

SINCE 2019

PRESENTATION TEMPLATE

PORTFOLIO MANAGEMENT

SERVICES

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# About

## MR WEALTH MANAGEMENT

MR WEALTH MANAGEMENT IS ONE OF THE FASTEST-GROWING COMPANIES IN THE FINANCIAL SERVICES SPACE IN INDIA WITH A TRUST OF MORE THAN 3 DECADES. SINCE ITS INCEPTION IN 2019, MR WEALTH MANAGEMENT HAS BEEN HELPING MILLIONS OF INVESTORS TO NAVIGATE THEIR INVESTING JOURNEY WITH EASE. MR WEALTH MANAGEMENT OFFERS A ONE-STOP SOLUTION FOR ALL INVESTING NEEDS RANGING FROM EQUITY, MUTUAL FUNDS, AND INSURANCE AND DEPOSITORY SERVICES, WE ARE COMMITTED TO PROVIDING INNOVATIVE AND RELIABLE SOLUTIONS IN BOTH TRADING AND INSURANCE SERVICES. WITH A STRONG FOUNDATION OF INTEGRITY, PROFESSIONALISM, AND CUSTOMER-FIRST VALUES, WE HELP INDIVIDUALS AND BUSINESSES SECURE THEIR INVESTMENTS AND SAFEGUARD THEIR FUTURE.



MR WEALTH  
MANAGEMENT



Growth Strategy  
Edge Strategy  
Aegis Strategy  
Value Strategy

**We Make The Best Service**

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# Why your Business Needs SEO

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presentation are tools that can be used as Irctures ,speeches,reports and more . it is mostly presented like before an audiance



**portfolio management service is a customized professional service where qualified and exoerenced portfolio management services (PMS) portfolio managers backed by a research team manage equity portfolio on behalf of clients with the objective of delivering consistent long -term returns while controlling the risk**

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# WHAT WE DELIVER ?

MR WEALTH MANAGEMENT  
DELIVERS



**Monthly reports, 24x7 online view of portfolio with 100% transparency**



**Prominent Business Updates**



**Professional Portfolio Management**



**Audited Tax Reports at FY End**

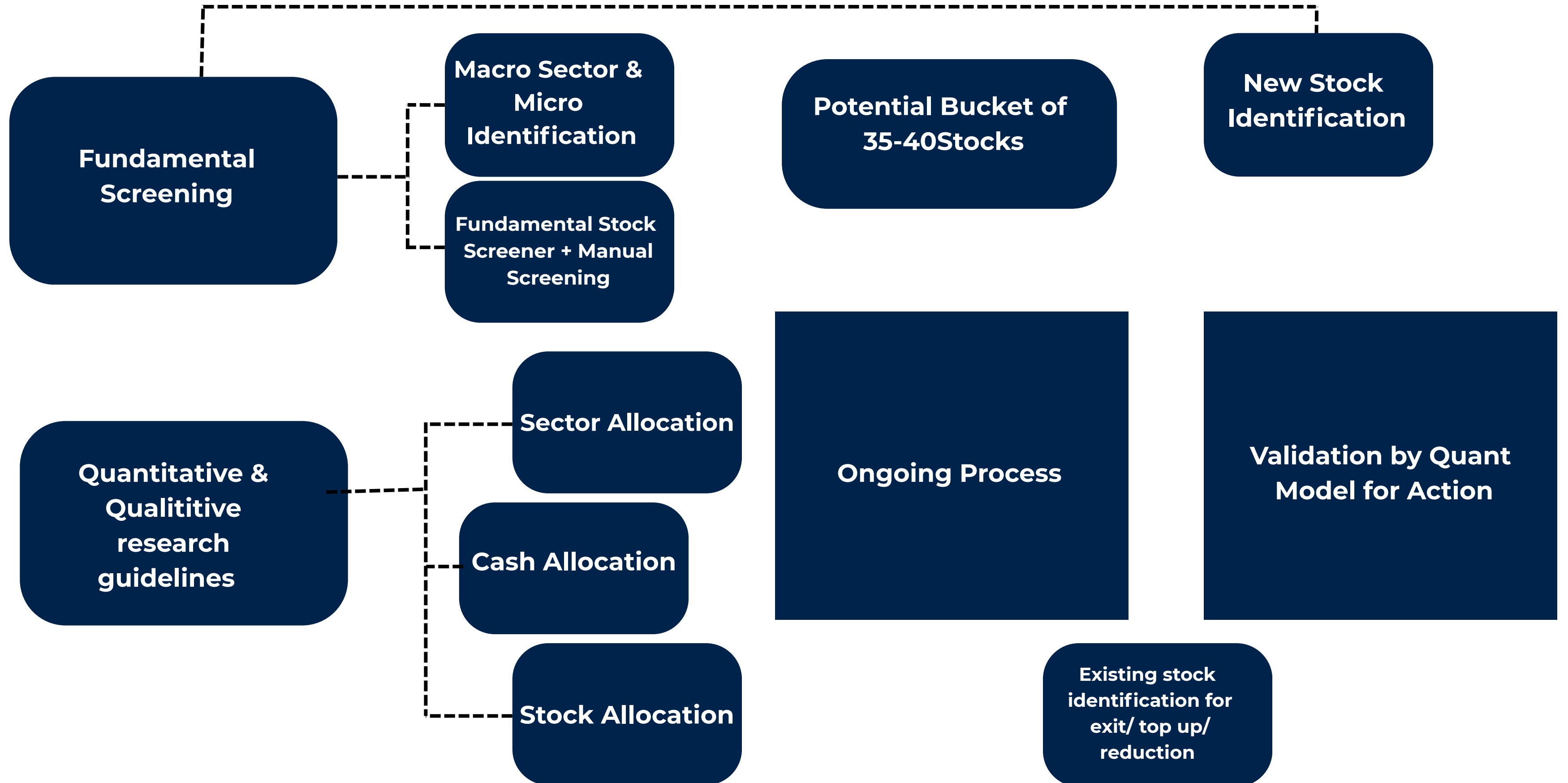


**Monthly Newsletter**



**24x7 End to End Support**

# Investment Process



# Technical Analysis

# Fundamental Analysis

MR WEALTH MANAGEMENT

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## Technical Analysis

Framework for diversification as a risk mitigation strategy. Portfolio construction matrix i.e. Portfolio stocks corelationship, percentage weightage. Entry and exit points. Focus on available data points and captures behavioural aspects. Price movement, beta, volatility, moving average, global macros – key parameters.

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## Fundamental Analysis

Top down approach. Mostly leader in their respective category. Recent or upcoming growth trigger point – stock specific/ industry specific. Focus on primarily growth aspect – ROE/ ROCE/ Profit ratio's.

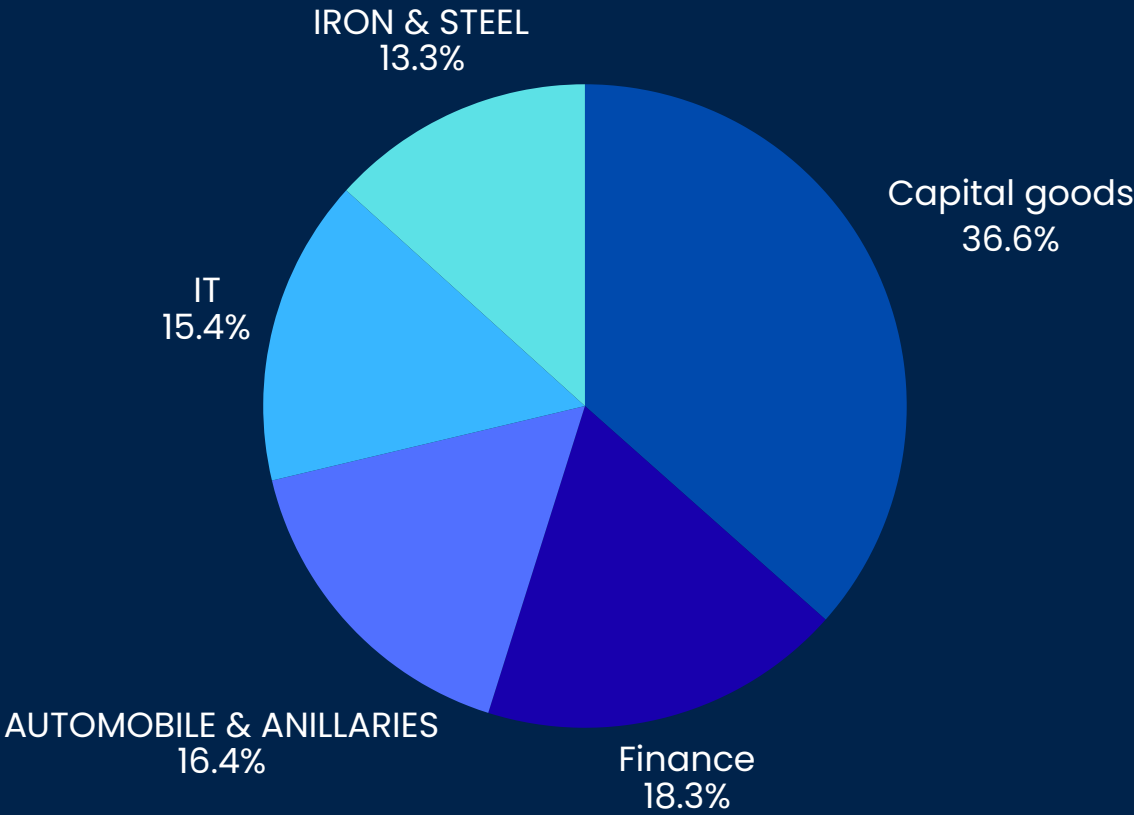
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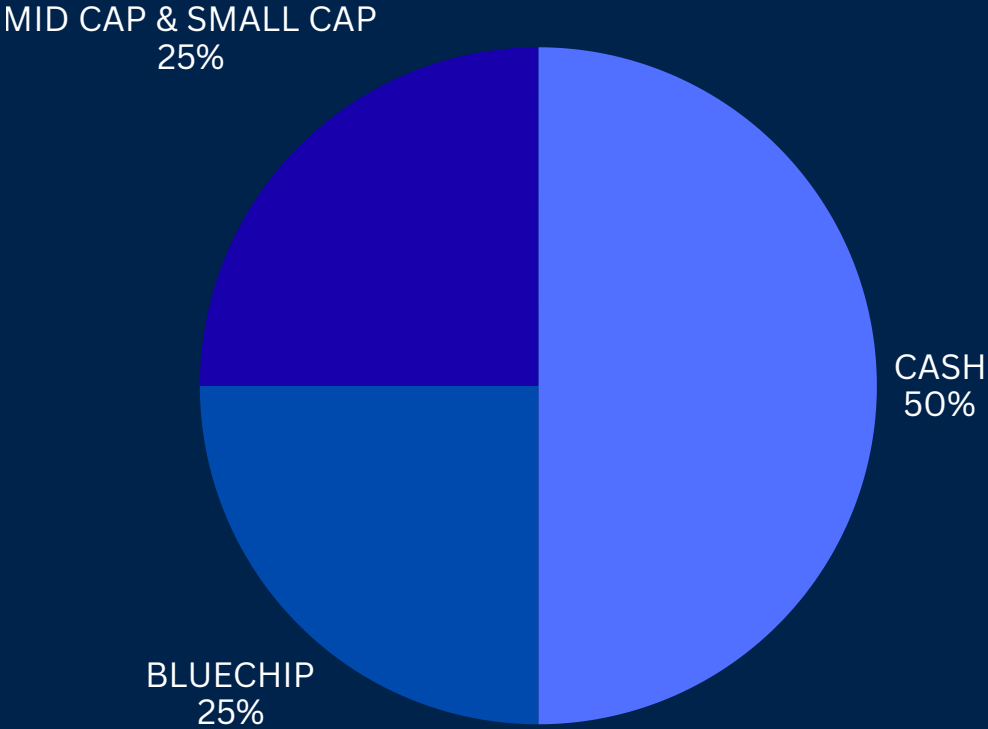
# Company Mission

Presentation Template

Top 5 Sector Holdings & Category Allocation



Top 5 Sector Holdings



Category - Wise Allocation

# Stock Selection Process

**Budding  
opportunity**

**Strong  
Fundamentals**

**Market outlook**



**More Info**

**About Us**

# Aegis Portfolio Composition

**A. TRENDING, QUALITY GROWTH  
BUSINESS (UP TO 90%)**

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**B. SP. OP/UNDERVALUED/TURNAROUND  
BUSINESS (UP TO 20%)**

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**C. TACTICAL/MOMENTUM  
PORTFOLIO (UP TO 10%)**

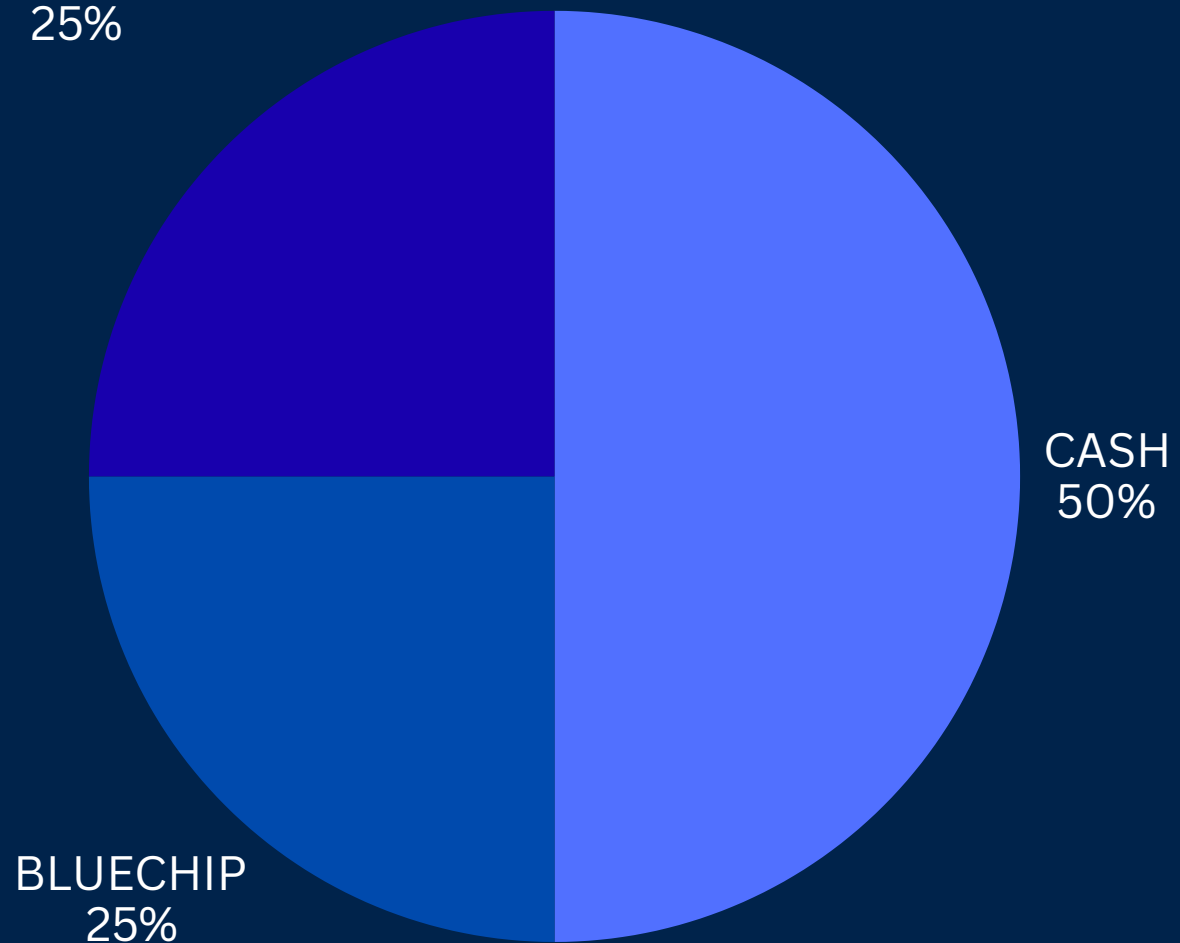
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# Top 5 Sector & Category Holdings Allocation

## MR WEALTH MANAGEMENT

MID CAP & SMALL CAP  
25%



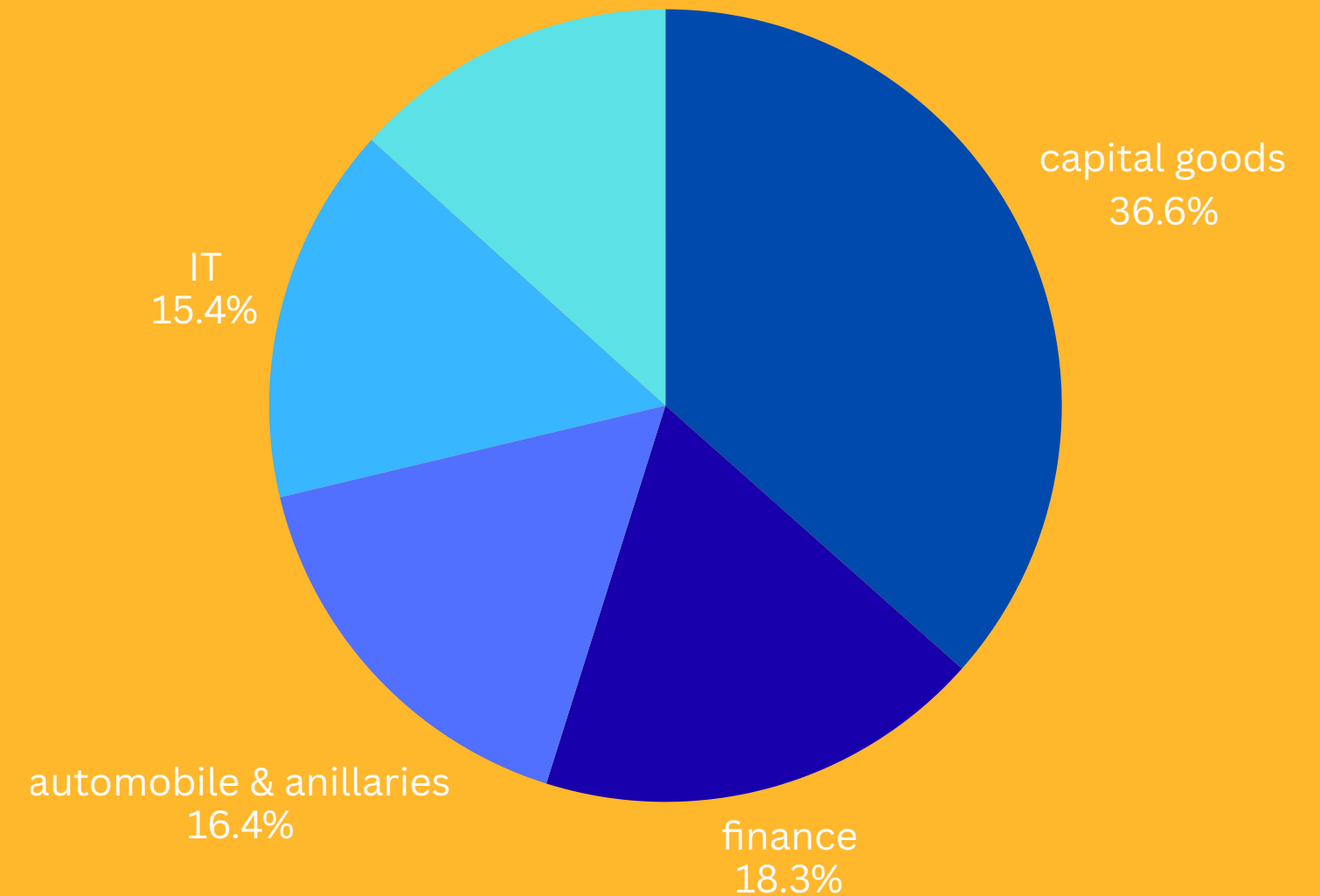
Category - Wise Allocation

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[More Info](#)

IRON & STEEL  
13.3%



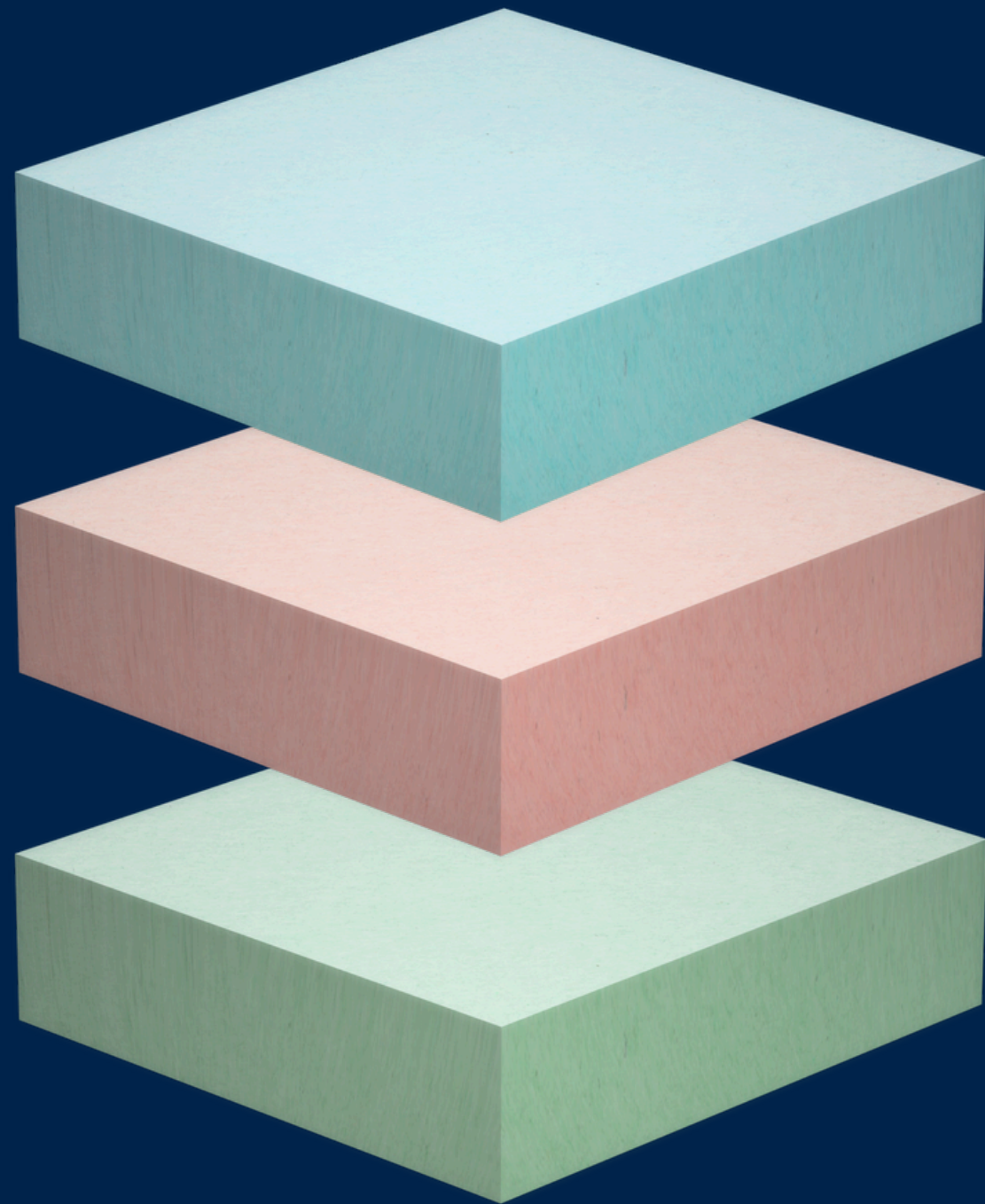
Top 5 Sector Holdings

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# Stock Selection Process

- Identifying Sectors/ Scripts based on Fundamental and Technical Screeners
- Greater than Mcap of 500 Crores and preferably below 50000 Crore
- Consistently improving Top Line growth preferably 10% plus (YOY).
- Expected Profit Growth of 25% plus (YOY)
- Individual Growth Triggers.
- Long Term opportunities
- Strong Market Position ,MOAT
- Business with Compounding Characteristics

# Stock Selection Process



- **60-70 companies complying our qualitative framework with business growth catalyst sustainable over 6 - 8 quarters**

- **Evaluation Process.**
- **Efficiency in use of Capital**
- **Valuations with good margin of safety.**
- **Liquidity.**

- **20 - 30 stocks having best possible growth scenarios.**

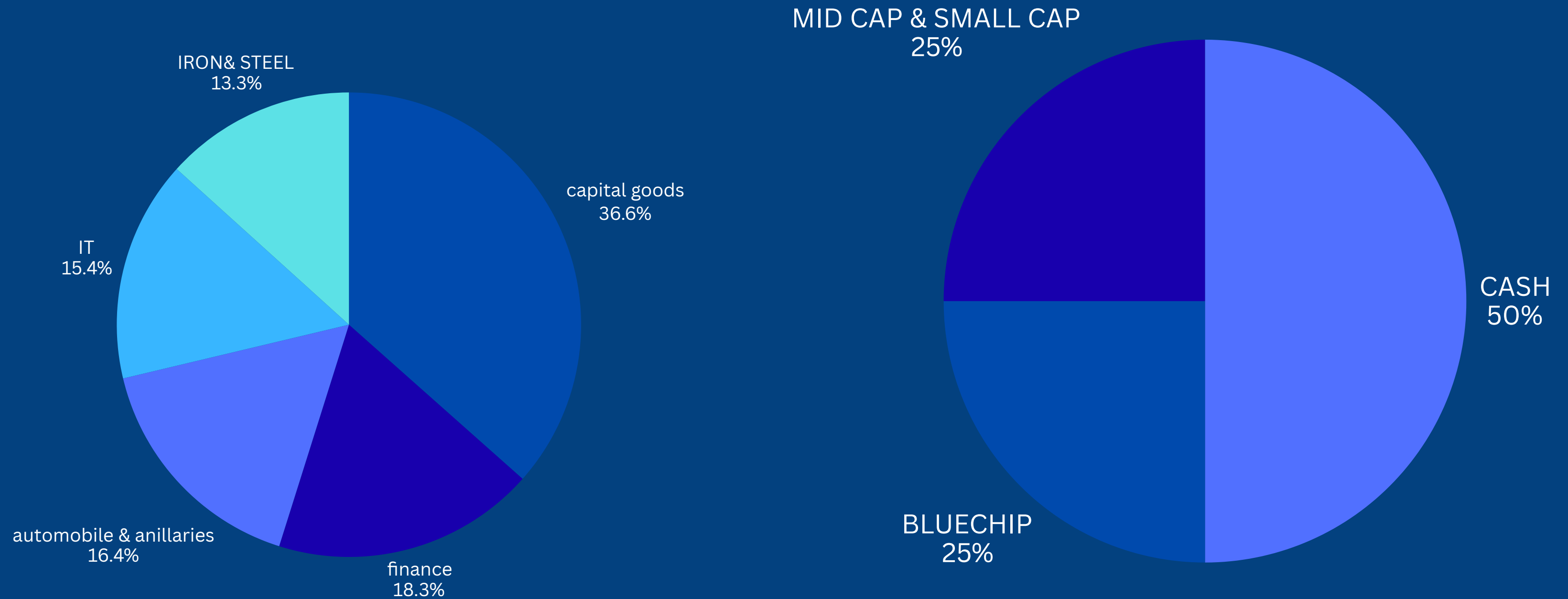


- **Stock Ideas Mining**
- **Continuous Review of holdings**
- **Returns**
- **Incubation Period to grow**
- **Gradual and staggered manner allocation**
- **Investment Committee review & Decision**
- **Screening with our quality framework**

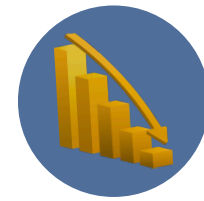


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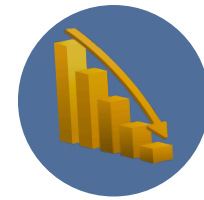
# Top 5 Sector Holdings & Category Allocation



# Exit Strategy



**Management Deviation  
from Plan**



**Sector headwind is on**



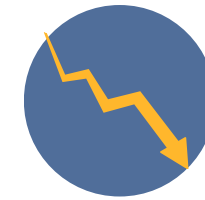
**Earning growth catalyst  
is saturated**



**Change in macros**



**Changes in Macro /fundamentals that  
makes the sector/ stocks at risk**



**If valuations have reached levels  
which may compromise outperformance**



**Relative better opportunities  
– Cost of opportunity**

# Contact Information

Presentation Template



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