

AAA - INDIA'S LEADING PORTFOLIO MANAGEMENT SERVICE PROVIDER



Why AAA?

1 FOUNDERS are the Fund Managers 	2 EASY ACCESS to the fund managers 	3 AWARD WINNING Investment Team and Track record 	4 COLLECTIVE Investment experience of more than 50 years 	5 NO CONFLICT OF INTEREST - we have only one line of activity - PMS and investment advisory 	6 ASSOCIATION with world class institutions - Deutsche Bank as Custodian and Fund Accountant; IL&FS as the DP
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Investment philosophy and the process

OUR BELIEF

“PROTECT CAPITAL, CREATE WEALTH”

Prudent risk management is the core of our investment philosophy. We do the risk management through:



DIVERSIFICATION



STAGGER INVESTMENT



DEFINED EXIT STRATEGY

Wealth Creation is done through “3M Stock Selection Process”

1 MARKET SIZE Identify the large business opportunities 	2 MARKET SHARE Identify the companies which are the leaders in their respective segments 	3 MARGIN OF SAFETY Buy the business/ stock at reasonable valuation
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Performance:

CAGR (%)	1 Year	2 Years	3 Years	5 Years	*Since Inception
AAA IOP Fixed Fee Plan	29.0%	18.7%	6.7%	17.1%	18.7%
BSE 500 Index	32.4%	16.8%	9.7%	16.0%	10.0%
BSE Midcap Index	36.8%	18.1%	6.5%	15.8%	10.5%
BSE Smallcap Index	47.0%	21.3%	3.6%	16.1%	9.1%
CNX Nifty	29.7%	16.0%	11.5%	15.8%	9.7%

*(23 November 2009 – 28 Feb 2021) (Performance after all expenses & fixed management fees)

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Equity Investments are subject to market risks, read all plan related documents carefully. Past performance may or may not be sustained in future and should not be used as a basis for comparison with other investments. Performance related information provided herein is not verified by SEBI.