

FEB 2025

1Y RETURN 3.8%
2Y RETURN 46.2%

InvestSavvy Portfolio Management LLP's Alpha fund has given a return of -16.2% for the month of Feb 2025, a one year return of 3.8% as on 28th Feb 2025. The fund is a flexicap fund - with focus on small, mid cap companies. Hence the Current Quarter has been challenging with the sharp correction in small & Mid cap stocks. We expect the market to form a bottom in March & rebound from there.

InvestSavvy 2-years return is 46.2% which is better than average 2 years return of all MF schemes across 446 listed scheme. Given are the details of the fund houses and their best and worst scheme returns.

Fund House	Average of 2 Yr Ret (%)	Best Scheme Ret(%)	Worst Scheme Ret(%)	No. of Schemes
Bandhan	19.4	36.4	12.3	15.0
Motilal Oswal	22.4	36.4	6.1	20.0
Invesco India	23.3	31.9	14.3	10.0
Quant	19.3	25.3	14.0	14.0
UTI	17.5	25.5	12.4	20.0
Franklin India	19.6	25.0	13.6	8.0
Kotak	18.9	28.7	12.5	17.0
DSP	19.2	23.7	13.9	15.0
SBI	19.1	28.8	12.7	25.0
Tata	17.1	25.7	10.3	15.0
Axis	19.3	29.7	13.3	16.0
LIC	16.0	23.9	10.7	16.0
All 446 Schemes	19.6	36.4	12.7	446.0



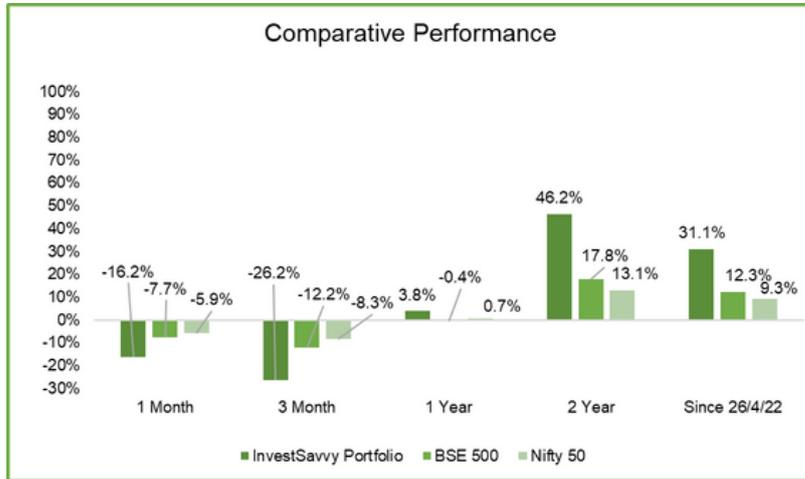
Source: www.investsavvy.in

Performance data and investment approach provided herewith, is not verified by SEBI



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Comparative Performance



	1 Month	3 Month	1 Year	2 Year	Since 26/4/22
InvestSavvy Portfolio	-16.2%	-26.2%	3.8%	46.2%	31.1%
BSE 500	-7.7%	-12.2%	-0.4%	17.8%	12.3%
Nifty 50	-5.9%	-8.3%	0.7%	13.1%	9.3%

The fund has outperformed benchmarks since inception.

As per PMSBazaar, one of the leading information provider for PMS and AIF offerings InvestSavvy has been Ranked

- As of Feb'25, we were ranked 7th, in 2 years.

We also Ranked in the top 5-10 funds for FY2023 and FY2024 by PMSbazaar and Moneycontrol.

Fund Manager



Ashish Goel, Managing Partner/Fund Manager, InvestSavvy was the topper at Carnegie Mellon University (MS in Computational Finance). He was a rankholder at IIM Calcutta, and did his B. Tech from IIT Kanpur. He has over 25 years of work experience in Financial Markets in India and overseas (Singapore, UK, USA) in top-tier financial institutions like Standard Chartered Bank (Managing Director), Bear Stearns, Dresdner Kleinwort Wasserstein, Safron (Hedge Fund) and ICICI Bank.

Investment Belief

It is our belief that companies with a compelling business story & having strong, competent and honest management are most likely to do well. We prefer investing companies that are valued reasonably with a MOS. Once we have identified prospective companies which meet the above criteria, we then use our internal metrics for our investment decisions.

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