

# JAN 2025

## OUTPERFORMANCE

### 1Y RETURN 23.6%

### 2Y RETURN 55.7%

InvestSavvy Portfolio Management LLP's "Alpha fund has given a return of -10.9% for the month of Jan 2025, a one year return of 23.6% as on 31st Jan 2025. The fund is a flexicap fund - with focus on small, mid cap companies.

This is higher than the return of all but 1% mutual fund scheme out of 486, and far more than the average MF return of 10.8% for the same period. Given are the details of the fund houses and their best and worst scheme returns.

Fund House	Average of 1 Yr Ret (%)	Best Scheme Ret(%)	Worst Scheme Ret(%)	No. of Schemes
Bandhan	10.3	20.7	1.3	17.0
Motilal Oswal	12.0	29.7	-1.1	24.0
Invesco India	18.2	27.3	9.4	10.0
Quant	6.8	16.3	-1.4	15.0
UTI	11.3	19.2	2.4	23.0
Franklin India	12.6	19.2	8.6	8.0
Kotak	11.3	21.2	2.3	19.0
DSP	11.7	18.1	4.5	18.0
SBI	12.4	34.5	4.5	27.0
Tata	9.5	13.5	2.2	15.0
Axis	12.3	19.8	6.1	17.0
LIC	13.2	19.0	8.1	16.0
<b>All 486 Schemes</b>	<b>10.8</b>	<b>34.5</b>	<b>6.9</b>	<b>486.0</b>



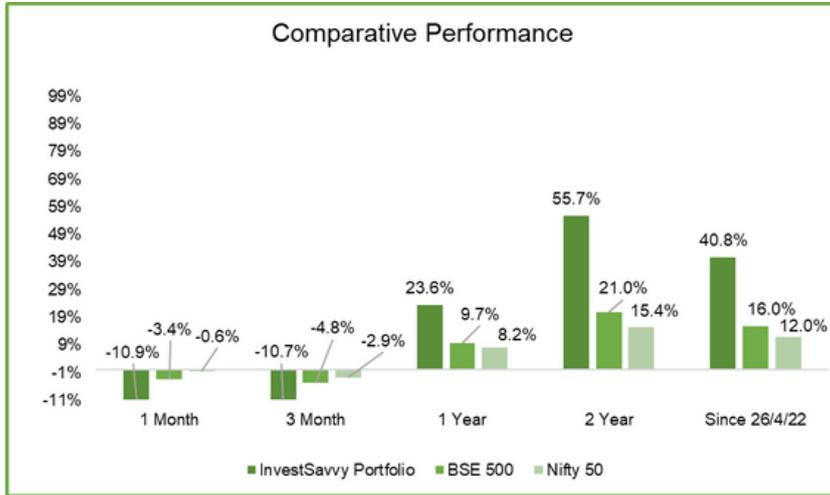
Source: [www.investsavvy.in](http://www.investsavvy.in)

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



B1404 Naman Midtown, S.B.Marg, Dadar(W), Mumbai

## Consistent Outperformance



The Alpha fund has outperformed the benchmark indices in all time frames respectively.

\*Returns of less than 1 year are absolute, and rest are annualised.

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

- No. 6 PMS in 2 year

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

	1 Month	3 Month	1 Year	2 Year	Since 26/4/22
<b>InvestSavvy Portfolio</b>	-10.9%	-10.7%	23.6%	55.7%	40.8%
<b>BSE 500</b>	-3.4%	-4.8%	9.7%	21.0%	16.0%
<b>Nifty 50</b>	-0.6%	-2.9%	8.2%	15.4%	12.0%

## 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.

## Contact us

+91 22 4013 5121

+91 89282 93936

www.investsavvy.in

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