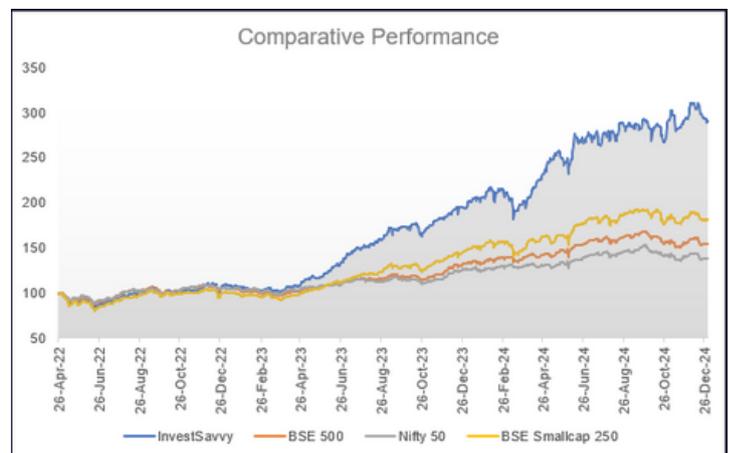


**DEC 2024**  
**OUTPERFORMANCE**  
**1M RETURN -1.2%**  
**1Y RETURN 49.8%**  
**2Y RETURN 64.1%**

We are happy to share with you that "InvestSavvy Portfolio Management LLP's" Alpha fund has given a return of -1.2% for the month of Dec, slightly better than benchmark and a one year return of 49.8% as on 31st Dec 2024. The fund is a flexicap fund - with focus on small, mid and microcap companies.

This is higher than the return of all but 1 mutual fund scheme out of 481, including ICICI, SBI, HDFC, Kotak etc., and far more than the average MF return of 30.8% for the same period. Given are the details of the fund houses and their best and worst scheme returns.

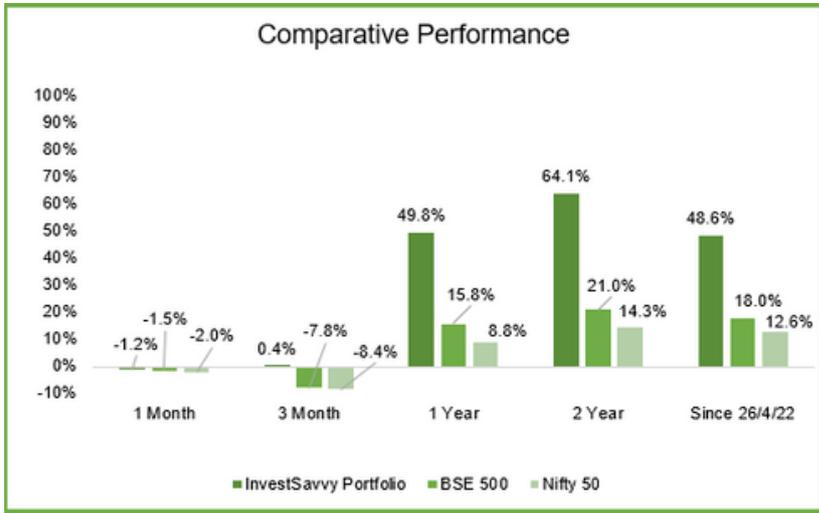
| Fund House             | Average of 1 Yr Ret (%) | Best Scheme Ret(%) | Worst Scheme Ret(%) | No. of Schemes |
|------------------------|-------------------------|--------------------|---------------------|----------------|
| Bandhan                | 20.1                    | 42.7               | 8.9                 | 17.0           |
| Motilal Oswal          | 24.7                    | 56.6               | 9.3                 | 23.0           |
| Invesco India          | 30.8                    | 42.7               | 9.8                 | 10.0           |
| Quant                  | 16.0                    | 23.9               | 9.2                 | 15.0           |
| UTI                    | 17.3                    | 28.0               | 9.0                 | 23.0           |
| Franklin India         | 20.3                    | 31.5               | 9.4                 | 8.0            |
| Kotak                  | 20.2                    | 33.2               | 9.1                 | 19.0           |
| DSP                    | 18.3                    | 26.8               | 9.1                 | 17.0           |
| SBI                    | 20.2                    | 43.0               | 8.9                 | 27.0           |
| Tata                   | 17.1                    | 31.4               | 8.7                 | 15.0           |
| Axis                   | 19.4                    | 32.0               | 9.2                 | 17.0           |
| LIC                    | 19.9                    | 39.6               | 8.2                 | 16.0           |
| <b>All 481 Schemes</b> | <b>19.5</b>             | <b>56.6</b>        | <b>9.9</b>          | <b>481.0</b>   |



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

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

## Consistent Outperformance



|                              | 1 Month | 3 Month | 1 Year | 2 Year | Since 26/4/22 |
|------------------------------|---------|---------|--------|--------|---------------|
| <b>InvestSavvy Portfolio</b> | -1.2%   | 0.4%    | 49.8%  | 64.1%  | 48.6%         |
| <b>BSE 500</b>               | -1.5%   | -7.8%   | 15.8%  | 21.0%  | 18.0%         |
| <b>Nifty 50</b>              | -2.0%   | -8.4%   | 8.8%   | 14.3%  | 12.6%         |

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
- No. 7 PMS in 1 year

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.

## Contact us

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