Wealth1
PMS & AIF INVESTMENTS

AIF Newsletter

Issue #09 | April 2026

REFRAMING RISK IN A COMPLEX WORLD

Strategic Allocation in India's Alternative Landscape

From the Desk of the CEO

Narender Agarwal
CEO, Wealth1

FY 25-26 closed the way it had been building for months - not with a whimper, but with a sharp reminder that markets are never fully insulated from the world around them. The escalation of the Iran-Israel conflict in late February sent crude oil above $100 per barrel, triggered a broad risk-off move, and delivered the Nifty's worst monthly decline since March 2020. For large-cap indices, FY 25-26 ultimately ended roughly where it began; a year of zero headline returns despite an economy that continued to grow at nearly 8%.

What FY 25-26 reinforced, more clearly than any bull market could, is the value of strategy over exposure. Investors holding diversified, actively managed alternative allocations, particularly through Category III AIFs experienced this correction very differently from those in passive or concentrated long-only formats. The dispersion across strategies was significant, and that dispersion is precisely the point.

As FY 26-27 opens, the structural case for alternatives has never been stronger. India's growth trajectory remains intact, private capital formation is accelerating, and the ecosystem of sophisticated fund managers deploying differentiated frameworks across long-only, long-short, and structured strategies continues to deepen. The question for investors is no longer whether to allocate to alternatives — it is how to do so with clarity, conviction, and the right time horizon.

This edition explores that question through performance data, a conversation with Nishad Khanolkar on our Returns & Beyond podcast, and a focused article on why patient capital deployed through the right vehicles continues to be India's most reliable compounder.

FY 26-27 begins not with certainty, but with possibility and for disciplined, long-horizon investors in alternatives, that is often the more interesting starting point.

Warm Regards,

Narender Agarwal

CEO,
Wealth1

From the Desk of the Business Head

Charmi Shah
Business Head, Wealth1

The April edition of the Wealth1 AIF Newsletter arrives at a natural reset point, FY 25-26 behind us, FY 26-27 ahead, and a market that has just been tested in ways that reveal the real texture of every portfolio.

This issue brings together three things we believe are especially relevant right now: data that puts March's volatility in context, a conversation that goes behind the performance numbers, and a piece of writing that speaks to something larger than any single month's returns.

Our CAT III AIF performance snapshots cover the full range of strategies - Long Only, Long Short, and beyond — across 1M, 1Y, 3Y, 5Y, and Since Inception periods. In a month as sharp as March 2026, how different strategies behaved is at least as instructive as the numbers themselves.

Our latest Returns & Beyond podcast features Nishad Khanolkar in a conversation that covers fund management discipline, portfolio construction in volatile environments, and the principles that guide allocation decisions when markets are moving fast. It is the kind of perspective that adds depth to what performance tables alone cannot convey.

And finally, our article this month... India's Structural Growth Story: Why Patient Capital Continues to Win, steps back from the noise of a single quarter to examine the longer arc: why India's compounding story remains intact, and why alternatives, built for patient capital, are increasingly central to how sophisticated investors are positioning for that story.

As markets evolve and complexity deepens, our commitment stays simple: make the best of India's AIF universe accessible, transparent, and easy to act on — the Wealth1 way.

Warm Regards,

Charmi Shah

Charmi Shah

Business Head,
Wealth1

Table of CONTENTS

Macro & Market Commentary

What Moved the Market – March 2026

March 2026 will be remembered as the month geopolitics overwhelmed fundamentals. The escalation of the Iran-Israel conflict in late February, which accelerated sharply through March, sent crude oil above $100 per barrel for the first time since 2022, triggering a coordinated risk-off move across global equity markets. For India, with its structural dependence on imported energy, the consequences were disproportionate.

The Nifty 50 declined approximately 11.3% during the month - its worst monthly performance since March 2020. Financials were the largest contributors to the drawdown, with the Bank Nifty falling almost 17%, as foreign institutional investors rotated sharply out of high-weight, rate-sensitive exposures. Autos, consumption, and IT also saw broad selling pressure. The outliers were healthcare, which held up relatively well, and metals, which finished the month roughly flat, benefiting from supply-chain disruption narratives tied to the Middle East conflict.

Importantly, the correction was not accompanied by systemic stress. Domestic institutional investors absorbed significant selling pressure as net inflows from DIIs during the month largely offset FPI outflows of comparable magnitude. The reset in valuations has been meaningful: the Nifty 50 now trades at approximately 19.5x one-year forward earnings, that's below its five-year averages, with the earnings yield spread over G-Sec yields moving into a range historically associated with strong forward return outcomes.

Globally, the picture was one of selective damage. The S&P 500 fell approximately 5.1%, as inflation expectations climbed on the oil shock and traders reassessed the pace of Federal Reserve easing.

The Nasdaq 100 declined in line with broad technology weakness, while the Dow Jones fell apprx 6%. Japanese equities were among the harder-hit developed market indices, with the Nikkei falling close to 10% as the yen strengthened and export earnings outlooks came under pressure.

The paradox of the month was in commodities. While crude oil posted one of its largest monthly gains on record - WTI rising from approximately $64/bbl at end-February to over $110/bbl by month-end; gold and silver sold off sharply. Gold declined approximately 12%, its worst month since 2008. The move reflected a shift in market narrative: the oil shock was increasingly read as inflationary rather than safe-haven inducing, raising the probability of Federal Reserve tightening and strengthening the US dollar. Higher real rate expectations pressured non-yielding assets, and gold bore the brunt of that repricing. India's 10-year G-Sec yield rose approximately 27 basis points through the month, closing near 6.93%, as fiscal and energy-driven inflation concerns clouded the domestic bond outlook.

March 2026 also marked the close of FY26, a year that ultimately delivered near-zero returns for large-cap indices despite strong economic fundamentals. The Nifty 50 ended FY26 roughly where it began, weighed down by persistent FPI outflows, valuation compression, and the geopolitical shock in the final month. Broader markets fared relatively better through much of the year before the March selloff erased gains. As FY27 opens, domestic macro conditions remain resilient - GDP growth at 7.8%, credit growth at 14.5%, and a capex cycle continuing to gain traction, setting up a potentially cleaner backdrop once geopolitical visibility improves.

Key Market Changes for February 2026

Indian Equities		Global Equities		Bond Market		Commodities	
Nifty 50	-11.31%	S&P 500	-5.09%	10Y G-Sec	+0.27%	Gold	-11.50%
Sensex	-11.49%	Dow Jones	-5.38%			Silver	-19.86%
Bank Nifty	-16.94%	Nasdaq	-4.89%			Crude Oil	+50.94%
Nifty MidCap 100	-10.94%	Nikkei	-9.71%				
Nifty SmallCap 100	-10.19%	*For Gold & Silver, we have taken US/OZ; and for Oil - WTI USOIL.					

Article

India's Structural Growth Story: Why Patient Capital Continues to Win

India's equity markets have delivered strong long-term returns, but more importantly, they have done so on the back of improving fundamentals rather than speculative excess. As of early 2026, India remains one of the fastest-growing major economies, with nominal GDP growth trending in the low double digits and corporate profitability at multi-year highs.

For investors, the key question is not whether India will grow but how to participate in that growth efficiently.

Earnings Growth is Doing the Heavy Lifting

Over the past few years, corporate India has seen a meaningful expansion in profitability:

- Nifty 50 earnings CAGR has averaged ~15–18% over FY20–FY25
- Corporate profit-to-GDP has risen from ~2.5% in FY20 to ~4.5%+ currently
- Banking sector ROAs are at decade highs (~1.2–1.5%), reflecting cleaner balance sheets

This marks a structural shift from the previous decade, where earnings growth lagged GDP due to high leverage and weak banking systems.

Today, with deleveraged corporate balance sheets and a healthier financial sector, incremental growth is translating more efficiently into profits.

Capex Cycle Revival is Real

One of the most significant changes in the Indian economy is the revival of the private capex cycle:

- Government capex has grown at ~20%+ CAGR over the last 3 years
- Capacity utilization in manufacturing is hovering around 74–76%, indicating room for expansion
- Sectors like defense, railways, renewables, and electronics manufacturing are witnessing multi-year order visibility

Companies are now reinvesting in growth after nearly a decade of balance sheet repair, creating a virtuous cycle of investment, income, and demand.

Domestic Flows Are Reshaping Markets

India's market structure has undergone a fundamental shift with the rise of domestic institutional investors:

- Monthly SIP inflows have crossed ₹18,000–20,000 crore consistently
- Demat accounts have grown from ~40 million in 2020 to 150+ million currently
- Domestic institutions have offset FII volatility in multiple phases

This steady flow of domestic capital has reduced market vulnerability to global shocks and improved stability during corrections.

Valuations: Elevated but Not Uniform

While headline indices may appear expensive:

- Nifty 50 trades at ~20–22x forward earnings, above long-term averages
- However, valuation dispersion is wide—many sectors remain reasonably priced relative to growth

For instance:

- Capital goods and manufacturing are supported by earnings visibility
- Financials remain attractive on a risk-reward basis
- Select consumption segments show premium valuations without commensurate growth

This divergence reinforces the importance of bottom-up stock selection over index-level views.

Where Alpha Lies Today

In the current environment, alpha generation is increasingly dependent on:

- Earnings durability over cyclical spikes
- Capital allocation discipline
- Ability to scale without balance sheet stress
- Participation in structural themes such as:

- Manufacturing (China+1 opportunity)
- Energy transition
- Financialization of savings
- Digital and premium consumption

Passive exposure may capture market returns, but differentiated performance will likely come from identifying businesses that can compound earnings at 18–20%+ over extended periods.

Conclusion

India’s growth story is no longer just a macro narrative—it is increasingly visible in corporate earnings, capital investment, and financial market depth.

However, higher participation and liquidity also mean that easy alpha is behind us. The next phase of wealth creation will likely belong to investors who combine data-driven insights with disciplined, bottom-up investing.

In this environment, patience is not just a virtue—it is a competitive advantage.

Nishad Khanolkar
President & Fund Manager
Bharat Value Fund | The Wealth Company

Narender Agarwal
CEO, Wealth1- PMS & AIF Investment

"An AIF Investment is not a T20, it is a Test Match...,"

-Says Nishad Khanolkar

Returns & Beyond Podcast #7

Episode Overview

In this episode of Returns & Beyond, Nishad Khanolkar, President and Fund Manager of Bharat Value Fund under The Wealth Company, the asset management arm of Pantomath Group, joins us for one of the most data-rich and conviction-driven conversations we have had on this show. With over 21 years of experience spanning asset management, investment banking, private equity, and M&A across India, Hong Kong, and Australia, Nishad currently manages close to ₹8,000 crore — nearly a billion dollars — across three SEBI-registered Category II AIFs, entirely in India's unlisted and pre-IPO space.

Nishad breaks down the evolving landscape of AIFs, PMS, and Mutual Funds, while giving a sharp, practical framework for investors navigating the unlisted space. The conversation spans across India's mid-market opportunity, the J-Curve thesis, active ownership, IPO exit mechanics, valuation arbitrage, and how a modern Category II AIF should be built — not just to generate returns, but to protect capital when things don't go according` to plan.

A practical, insight-heavy discussion, this episode goes beyond fund marketing to focus on conviction, portfolio construction, risk architecture, and the discipline required to back companies that haven't yet rung the listing bell — but are about to.

Key Themes & Insights

1. **The Big Picture: Where AIF Fits**

AIFs are the fastest-growing investment category, but not for everyone.
Ideal progression:

- Start with Mutual Funds
- Move to PMS as wealth grows (~₹3–5 Cr liquid)
- Enter AIFs only when you cross ₹6–7 Cr liquid net worth

2. **AIF = Test Match, Not T20**

AIF investing is a long-term game (5–9 years)
Category insights:
Cat I (VC/Startups): High risk, long horizon
Cat II (Private Equity/Unlisted): Balanced, most relevant
Cat III (Listed/Derivatives): Tactical, shorter-term

For most investors, Category II is the sweet spot

3. How to Select the Right AIF Fund Manager

Nishad simplifies it into 3 non-negotiable questions:

- **Exit Track Record:** Returns are real only when money hits your bank account.
- **Primary vs Secondary Strategy:** Prefer primary (growth capital) over secondary trades.
- **Promoter Quality (Jockey > Horse):** Bet on the promoter mindset, not just the business.

4. Hidden Gems Strategy (Unlisted Investing Playbook)

Nishad's fund follows a risk-first approach, focusing on:
IPO visibility within 30–36 months
Strong fundamentals:

- ₹1000Cr+ revenue (or strong scale)
- Asset-backed or strong order book
- Profitable & compliant
- Promoter skin in the game
- Second-generation involvement

5. "Low Risk, High Reward" Mindset

Contrary to market belief:

- Not about chasing 10x bets
- Focus on consistent 20–25% across portfolio companies
- Strategy = Minimize downside → returns follow

6. The Ecosystem Advantage

The Wealth Company operates like an "investment ecosystem":

- Capital + data + distribution + compliance + IPO execution
- Helps companies scale and reach IPO faster
- Ensures better control over outcomes, especially exits

7. Risk Management Framework

Max 10–12% per company
Max 20% per sector
Multiple exit routes:

- IPO
- OFS (Offer for Sale)
- Secondary deals
- Strategic exits

Even in worst-case scenarios, portfolio damage is contained.

8. Macro View & Investor Mindset

- India growth story is intact and globally recognized
- Market cycles are normal → don't panic
- Wealth is created at entry, not exit

3 golden rules:

- Trust the India story
- Focus on entry valuation
- Ensure compliance & governance

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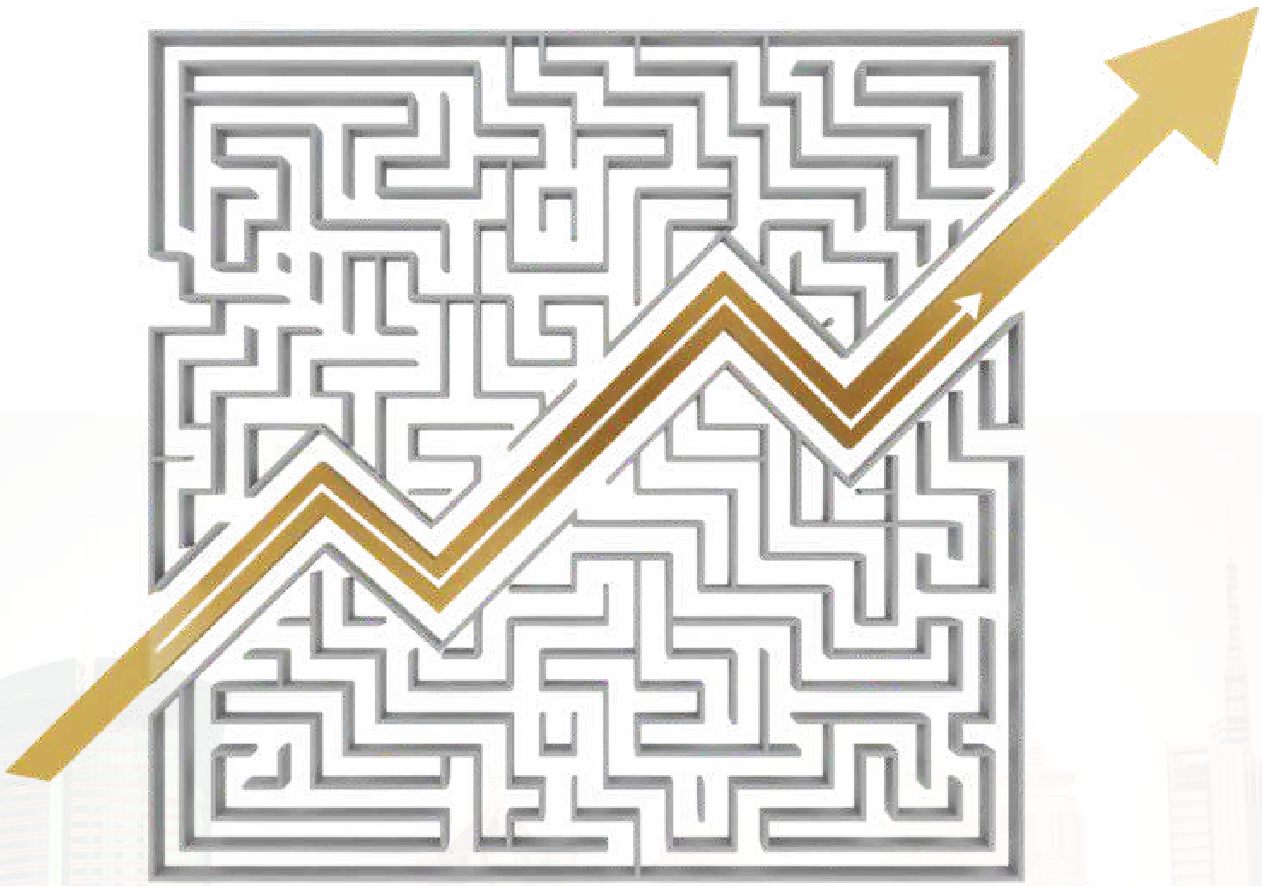
Navigating the complex world of PMS & AIF investments



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TOP PERFORMING FUNDS - BASED ON 1M RETURNS

AMC	Fund	CATEGORY	TYPE	RETURNS (%)					
				1M	6M	1Y	3Y	5Y	SI
ICICI Prudential AMC Ltd	Long Short Fund-I ^	EQUITY	Long Short	7.38%	6.58%	7.49%	6.69%	8.28%	10.77%
Geojit Financial Services Ltd	Geojit Yield Plus Fund *	EQUITY	Long Short	1.64%	7.72%	NA	NA	NA	10.36%
ASK Long Short Fund Managers Pvt Ltd	ASK Absolute Return Fund *	EQUITY	Long Short	1.04%	3.53%	7.58%	NA	NA	12.52%
Whitespace Alpha	Whitespace Fund II - Debt Plus *	DEBT	-	0.86%	4.82%	11.31%	12.59%	12.63%	13.32%
Northern Arc Investment Managers Pvt Ltd	Money Market Alpha Fund ^	DEBT	-	0.76%	4.49%	9.16%	9.64%	9.51%	9.49%
Neo Asset Management Pvt Ltd	Treasury Plus Fund *^	EQUITY	Long Short	0.70%	5.64%	12.00%	NA	NA	13.15%
Dolat Capital Market Pvt Ltd	Absolute Return LLP *	EQUITY	Long Short	0.67%	4.38%	7.52%	13.69%	10.95%	11.19%
YES Securities India Limited	Yes Alpha Plus Fund ^	EQUITY	Long Short	0.52%	4.99%	-0.21%	5.20%	7.10%	7.10%
Inquant Systematic Investment Managers LLP	Inquant Debt Plus *^	EQUITY	Long Short	0.28%	3.99%	9.74%	11.05%	NA	10.04%
Prajana Advisors Pvt Ltd	Stock Convertible Scheme ^	EQUITY	Long Short	-0.33%	1.68%	5.19%	NA	NA	4.79%

TOP PERFORMING FUNDS - BASED ON 1Y RETURNS

AMC	Fund	CATEGORY	TYPE	RETURNS (%)					
				1M	6M	1Y	3Y	5Y	SI
Sundaram Alternate Assets Ltd	Opportunities Series - ACORN ^	EQUITY	Long Only	-6.57%	5.59%	22.07%	23.58%	16.42%	18.22%
Abakkus Asset Manager Private Limited	Growth Fund - 1 ^	EQUITY	Long Only	-10.15%	-6.15%	13.22%	17.07%	15.74%	17.21%
Pluswealth Capital Management LLP	Pluswealth Assets LLP *	EQUITY	Long Short	-2.51%	1.57%	12.44%	12.86%	NA	15.46%
Neo Asset Management Pvt Ltd	Treasury Plus Fund *^	EQUITY	Long Short	0.70%	5.64%	12.00%	NA	NA	13.15%
Whitespace Alpha	Whitespace Fund II - Debt Plus *	DEBT	-	0.86%	4.82%	11.31%	12.59%	12.63%	13.32%
Singularity AMC LLP	Singularity Equity Fund I *	EQUITY	Long Only	NA	-11.12%	10.64%	NA	NA	34.06%
SageOne Investment Managers LLP	SageOne Flagship Growth OE fund ^	EQUITY	Long Only	-10.20%	-3.90%	10.40%	NA	NA	-2.00%
Inquant Systematic Investment Managers LLP	Inquant Debt Plus *^	EQUITY	Long Short	0.28%	3.99%	9.74%	11.05%	NA	10.04%
ICICI Prudential AMC Ltd	Growth Leaders Fund - 1 ^	EQUITY	Long Only	-2.92%	2.52%	9.34%	23.18%	NA	18.30%
Northern Arc Investment Managers Pvt Ltd	Money Market Alpha Fund ^	DEBT	-	0.76%	4.49%	9.16%	9.64%	9.51%	9.49%

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*Gross of expenses and taxes
^ Post Expesnes, Pre-taxes
^^ Post Expenses and taxes, Pre-Performing Fees
*^ Post Expenses, Pre-Tax & Performing Fees
** Net of expenses and taxes

TOP PERFORMING FUNDS - BASED ON 3Y RETURNS

AMC	Fund	CATEGORY	TYPE	RETURNS (%)					
				1M	6M	1Y	3Y	5Y	SI
Shepherd's Hill Financial Advisors LLP	Shepherd's Hill Private Investment Fund ^^	EQUITY	Long Only	-3.15%	-1.54%	6.85%	31.98%	27.00%	18.83%
Carnelian Asset Management and Advisors Pvt Ltd	Capital Compounder Fund - 1 *^	EQUITY	Long Only	-11.07%	-6.60%	7.34%	27.22%	19.49%	19.81%
Prudent Equity Pvt Ltd	ACE Fund *	EQUITY	Long Only	-9.60%	-10.40%	-8.00%	24.80%	NA	21.30%
I Wealth Management LLP	I Wealth Fund **	EQUITY	Long Only	-1.37%	-0.14%	6.29%	24.11%	19.00%	17.68%
Sundaram Alternate Assets Ltd	Opportunities Series - ACORN ^	EQUITY	Long Only	-6.57%	5.59%	22.07%	23.58%	16.42%	18.22%
ICICI Prudential AMC Ltd	Growth Leaders Fund - 1 ^	EQUITY	Long Only	-2.92%	2.52%	9.34%	23.18%	NA	18.30%
Aequitas Investment Consultancy Pvt Ltd	Equity Scheme I **	EQUITY	Long Only	-0.58%	-0.45%	1.62%	22.52%	33.26%	21.78%
Sameeksha Capital Pvt Ltd	India Equity Fund *	EQUITY	Long Only	-11.00%	-13.90%	-4.80%	22.40%	NA	18.20%
Motilal Oswal Asset Management Company Ltd	Motilal Oswal Founders Fund Series 1 ^	EQUITY	Long Only	-5.63%	-12.66%	-3.48%	21.73%	NA	19.04%
Ampersand Capital Trust	Growth Opportunities Fund Scheme - I **	EQUITY	Long Only	-9.90%	-12.40%	-5.80%	21.70%	19.50%	17.20%

TOP PERFORMING FUNDS - BASED ON 5Y RETURNS

AMC	Fund	CATEGORY	TYPE	RETURNS (%)					
				1M	6M	1Y	3Y	5Y	SI
Aequitas Investment Consultancy Pvt Ltd	Equity Scheme I **	EQUITY	Long Only	-0.58%	-0.45%	1.62%	22.52%	33.26%	21.78%
Shepherd's Hill Financial Advisors LLP	Shepherd's Hill Private Investment Fund ^^	EQUITY	Long Only	-3.15%	-1.54%	6.85%	31.98%	27.00%	18.83%
Abakkus Asset Manager Private Limited	Emerging Opportunities Fund - 1 ^	EQUITY	Long Only	-9.28%	-10.66%	3.20%	16.50%	19.87%	25.06%
First Water Capital Advisors LLP	First Water Capital Fund *^	EQUITY	Long Only	-13.08%	-19.21%	-12.53%	21.45%	19.80%	24.85%
Ampersand Capital Trust	Growth Opportunities Fund Scheme - I **	EQUITY	Long Only	-9.90%	-12.40%	-5.80%	21.70%	19.50%	17.20%
Carnelian Asset Management and Advisors Pvt Ltd	Capital Compounder Fund -1 *^	EQUITY	Long Only	-11.07%	-6.60%	7.34%	27.22%	19.49%	19.81%
I Wealth Management LLP	I Wealth Fund **	EQUITY	Long Only	-1.37%	-0.14%	6.29%	24.11%	19.00%	17.68%
Whitespace Alpha	Whitespace Fund I - Equity Plus *	EQUITY	Long Short	-11.41%	-7.37%	5.52%	15.06%	17.58%	20.84%
Sundaram Alternate Assets Ltd	Opportunities Series - ACORN ^	EQUITY	Long Only	-6.57%	5.59%	22.07%	23.58%	16.42%	18.22%
Abakkus Asset Manager Private Limited	Growth Fund - 1 ^	EQUITY	Long Only	-10.15%	-6.15%	13.22%	17.07%	15.74%	17.21%

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TOP PERFORMING FUNDS - BASED ON SI RETURNS

AMC	Fund	CATEGORY	TYPE	RETURNS (%)					
				1M	6M	1Y	3Y	5Y	SI
A9 Finsight Pvt Ltd	Finavenue Growth Fund *	EQUITY	Long Only	-8.95%	-20.77%	-1.28%	NA	NA	43.77%
Singularity AMC LLP	Singularity Equity Fund I *	EQUITY	Long Only	NA	-11.12%	10.64%	NA	NA	34.06%
Aarth AIF	Aarth Growth Fund *^	EQUITY	Long Only	-7.85%	-17.54%	5.82%	NA	NA	33.02%
Swyom Advisors Ltd	India Alpha Fund *	EQUITY	Long Short	-3.16%	-13.84%	-1.53%	NA	NA	29.04%
White Oak Capital Management Consultants LLP	India Equity Fund VI **	EQUITY	Long Only	-11.81%	-13.98%	-7.36%	11.94%	NA	27.60%
Guardian Capital Partners	Opportunities Scheme *	EQUITY	Long Only	-12.29%	-10.46%	-0.91%	14.51%	0.1372	25.53%
Abakkus Asset Manager Private Limited	Emerging Opportunities Fund - 1 ^	EQUITY	Long Only	-9.28%	-10.66%	3.20%	16.50%	19.87%	25.06%
First Water Capital Advisors LLP	First Water Capital Fund *^	EQUITY	Long Only	-13.08%	-19.21%	-12.53%	21.45%	19.80%	24.85%
Rational Equity Trust	Rational Equity Flagship Fund I ^^	EQUITY	Long Only	-12.53%	-16.65%	-9.61%	NA	NA	22.21%
Aequitas Investment Consultancy Pvt Ltd	Equity Scheme I **	EQUITY	Long Only	-0.58%	-0.45%	1.62%	22.52%	33.26%	21.78%

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