

METHODOLOGY

SIP MODEL PORTFOLIO

GROWTH ORIENTED – MODERATELY
AGGRESSIVE RISK PROFILE

Investment objective

The aim is to generate long term returns by creating a large cap and mid cap stocks only portfolio with a SIP focus between INR 20,000 to INR25,000 per month.

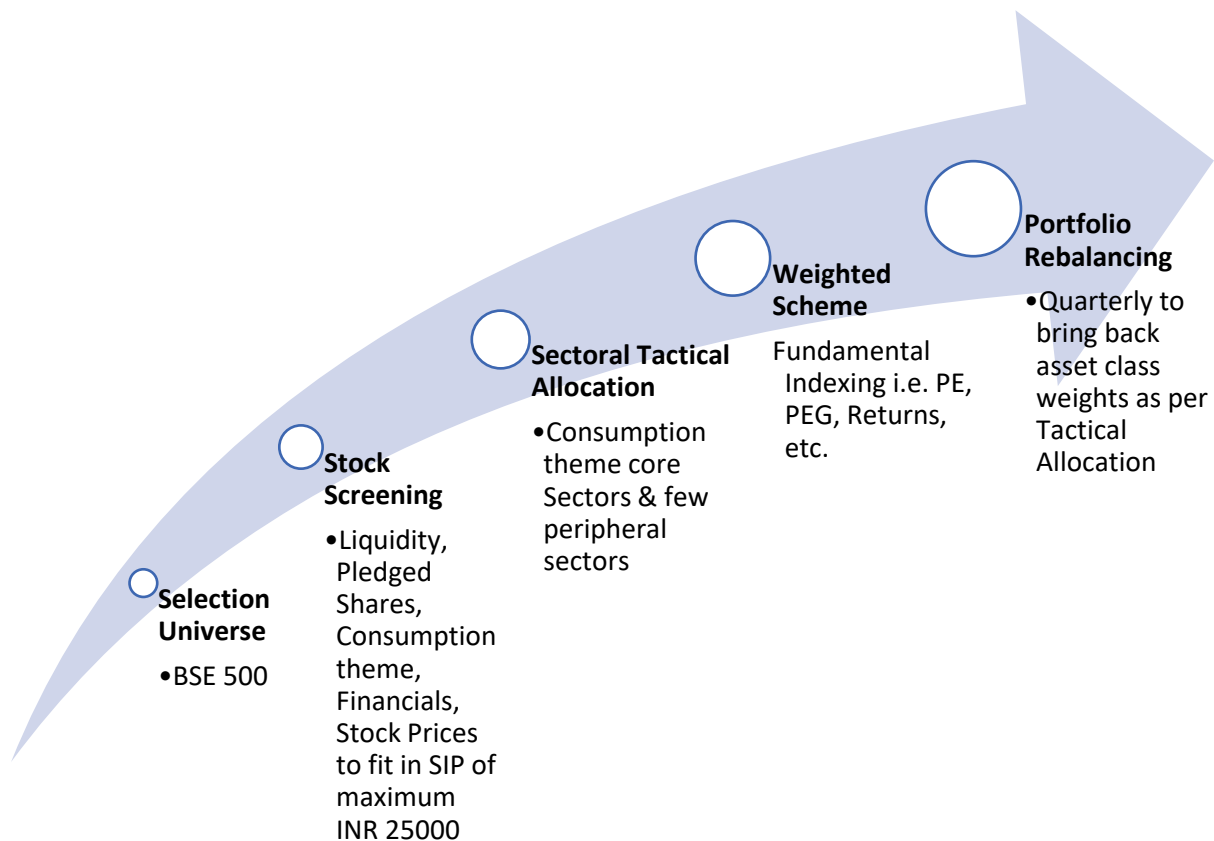
Strategy

Buy and Hold investments with a time horizon of at least 5 years in stocks with moderate to high risk and consistent performance.

Use Case

This model portfolio is useful for investors who have a periodic pool of money to invest in direct stocks for meeting long term investment goals. This portfolio comprises of investing into direct equities and is meant for investors with moderately high-risk appetite. The portfolio is built primarily from Large Cap stock; however, there is some allocation done to Mid Cap stocks as well.

Methodology



Rebalancing Frequency

Portfolio is rebalanced once in a quarter to bring back the sectoral allocation at desired level and for an in-depth stock level check.

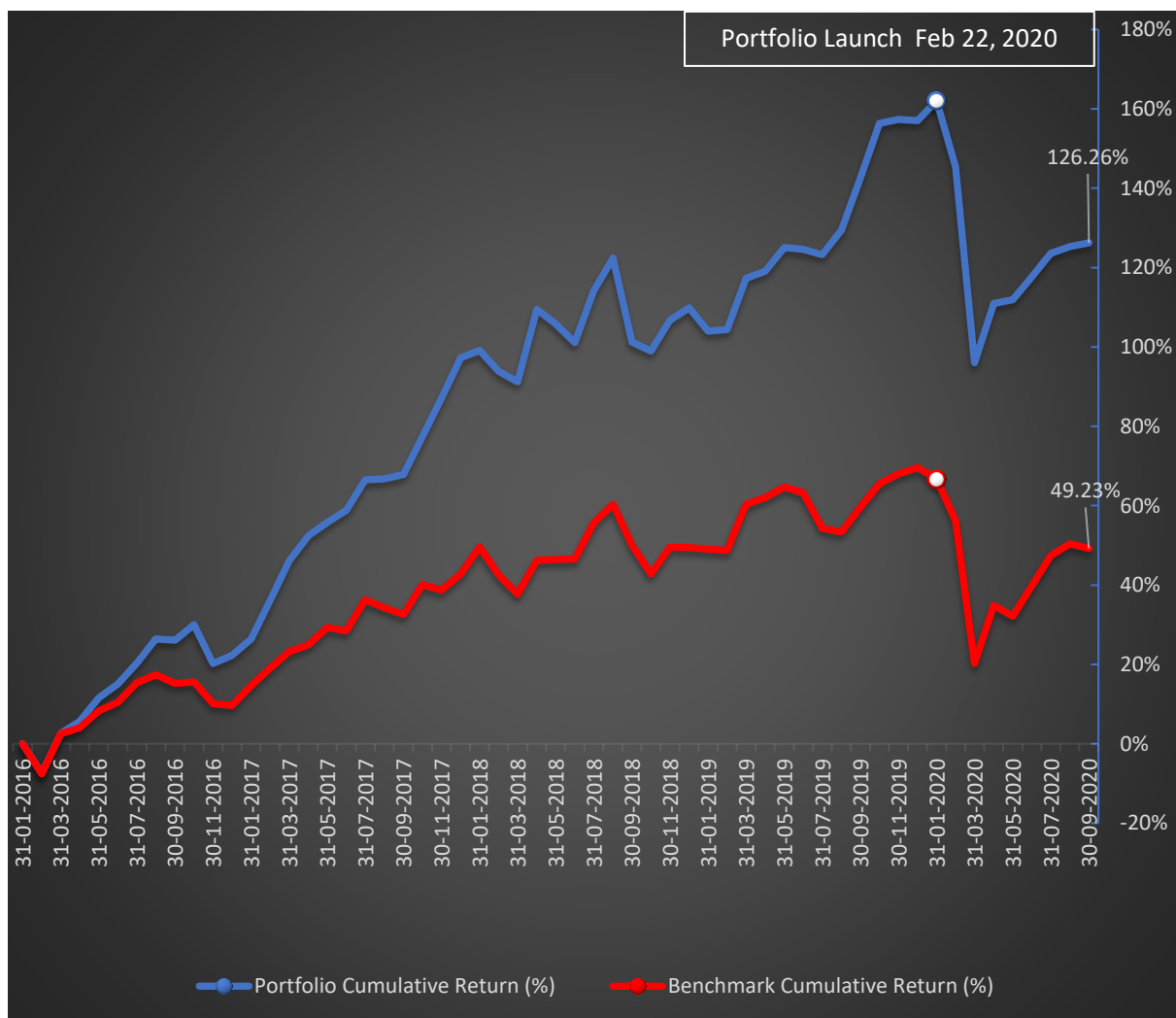
Portfolio Monitoring

Model Portfolios are monitored monthly to assess any exit/entry required based on market events, significant sector level changes, any company specific announcement, analyst reports or any corporate governance issue.

Sectoral Allocation and Stock Selection

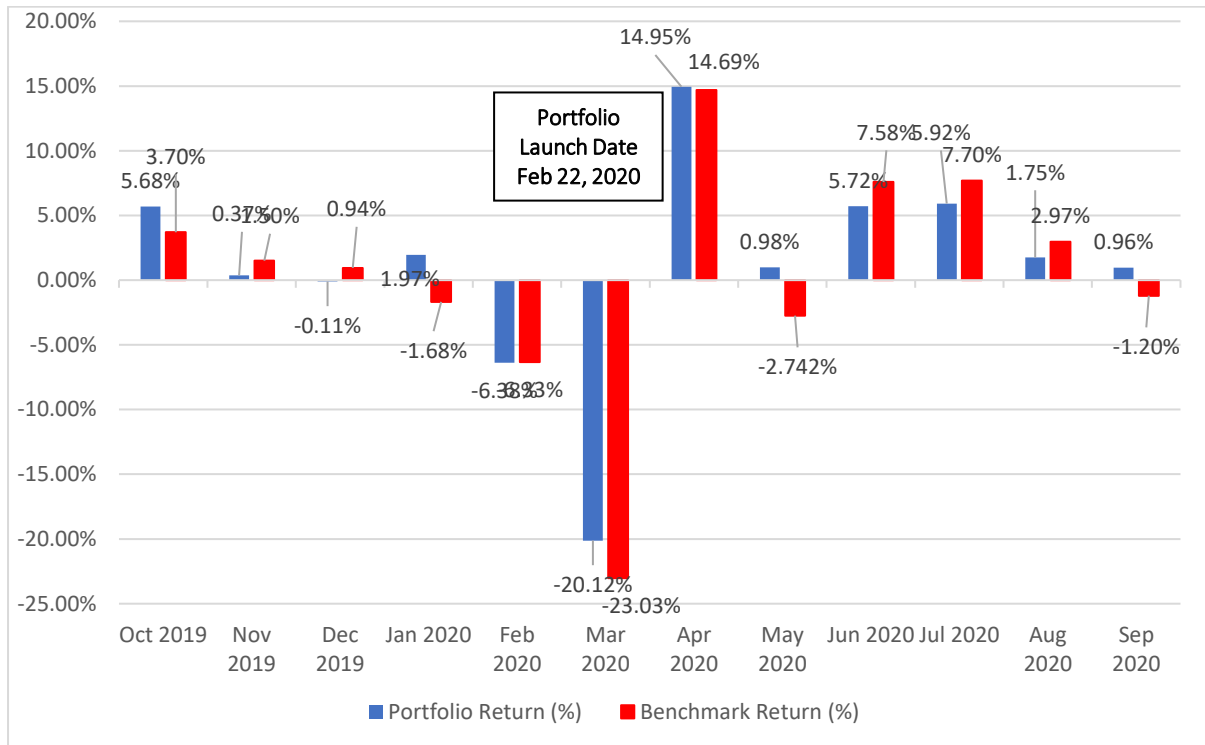
This model portfolios follow Warren Buffett’s principle where he says that an individual should invest only in the companies whose business they understand. And therefore, “Consumption” is the core theme for constructing this portfolio along with some peripheral sectors like Paints, Healthcare, Retails etc i.e. investing in companies that are into consumer centric businesses that grow with consumption and businesses that are into financing this retail consumption. There are a few peripherals stocks too that do not fit completely into the consumption theme, but their inclusion is driven by very strong fundamentals of the company and the company’s effort in making their brand and product visible to retail investors. The idea is to utilize quantitative and qualitative factors observed based on our extensive research for suggesting a SIP model portfolio that make sense for individual investors.

SIP Model Portfolio's performance against NIFTY50



SIP Model Portfolio's Last 1 Year Monthly Returns

The chart below shows last one year's monthly performance of the SIP Model Portfolio against the monthly returns of benchmark NIFTY50.



Guidelines

1. 10 - 15 stocks portfolio
2. Stock portfolio - Minimum exposure of 5% and maximum 15% to avoid concentration risk
3. Minimum investable amount per month between INR 20000 to INR 25000

Disclaimer: The information on this site is provided for reference purposes only and should not be misconstrued as investment advice. Under no circumstances does this information represent a recommendation to buy or sell stocks. All these portfolios are created based on our expert's experience in the market. These Model Portfolio are prepared by SEBI Registered RIA.