



by 5nance.com

Managed by AI.
Driven by Results.



Where Innovation meets Supremacy

Cracking the Ascend code

Ascend is an AI-powered, multi-asset investment portfolio carefully crafted to safeguard and exponentially grow your wealth. It is an intuitive and a self- evolving investment advisory platform. Ascend is the future of intelligent investing as it eliminates human biases & continuously adapts to the changing market cycles.

Ascend through Diversification

Embrace a smarter approach to investing with Ascend's multi-asset strategy. We allocate investments across a diverse range of asset classes, including -



This diversified approach across assets and geographies mitigates risks and enhances the potential for superior returns.

What sets Ascend apart?

We use Big Data analytics to evaluate all sorts of market cycles, plus we have over 18 years of backtested data to enhance portfolio performance.

Core Element: Ascending Performance



Over the last few years of rigorous backtesting, Ascend has consistently delivered **36% CAGR - With Absolute Capital Preservation.**

Who should invest with Ascend?

Ascend is for investors seeking exceptional growth. This exclusive platform is tailored for high-net-worth individuals, providing personalized wealth management solutions. Only the most astute individuals are invited.

"Make your portfolio smarter, bolder, and better with AI."

Why is Ascend the Game-Changer?

Ascend monitors market trends and stock performances seamlessly to make profitable decisions. Through advanced AI technology, our expert fund managers ensure that every decision is rooted in objective, data-driven insights.

Key Advantages of Ascend



Precision and Efficiency

Our algorithm analyzes the NIFTY500, classifying stocks into 46 distinct indices and identifying their current market phase. This precision allows us to make informed, data-driven investment decisions.



Intelligent Portfolio Construction

Ascend's AI-powered model handpicks stocks that exhibit consistent, long-term performance and offer an optimal risk-to-reward ratio.



Exceptional Returns

Over the last three years, Ascend has consistently outperformed NIFTY, delivering an impressive 35% CAGR.



Capital Preservation

Our commitment to capital preservation is unwavering. Ascend's intelligent algorithms are designed to protect your investments while optimizing returns.



Proactive Guidance

Ascend provides active rebalancing updates to ensure your portfolio remains aligned with your investment goals.

"We think of our customers first in every aspect of business."

We are revolutionizing the financial services eco-system with AI-powered innovative solutions. Our AI-based strategies help maximize financial profitability and deliver scalable investment solutions for businesses and individuals.

30.24%

3 Years Rolling
CAGR

100%

Capital
Preservation
(over 3 years)

18Yrs.

Back tested Data

100+

Team Experience
in Years

86%

Profitable
Investments

30-45

Securities in
Portfolio

18.2%

Average
Profit per Trade

7

Asset Classes
Diversification

"A strong foundation built with AI"

About Our Fund Management Team



Dr. Chintan Vora

Chintan has over 17 years of experience in personal financial management, and worked with ICICI Bank, HSBC and ICICI Securities. With a post graduate degree in Finance and Marketing and a Doctorate (Ph.D.) in Management, he is a CFPCM and an alumnus of IIM – Calcutta.



Rajendra Mangaonkar

Rajendra Mangaonkar has over 25 years of experience in Trading Systems Design & Development. Previously, he worked as a consultant for broking houses like Adita Birla and Angel Broking. Currently, he's responsible for delivering wealth management advisory. He is a Graduate in Computer Science from DY Patil, Mumbai

Ascend Year-On-Year Performance

Financial Year	Ascend		Nifty		Alpha	
2017-2018	48.87%	▲	10.25%	▲	38.62%	▲
2018-2019	17.16%	▲	14.93%	▲	2.23%	▲
2019-2020	10.22%	▲	-26.03%	▼	36.25%	▲
2020-2021	131.16%	▲	70.87%	▲	60.29%	▲
2021-2022	87.31%	▲	18.88%	▲	68.43%	▲
2022-2023	26.50%	▲	-0.60%	▼	27.10%	▲
2023-2024	77.45%	▲	28.62%	▲	48.83%	▲
2024-2025	5.96%	▲	5.34%	▲	0.62%	▲

"We let our actions speak in numbers."

Asset Allocation

The financial markets are dynamic, and so is Ascend. Our AI system adapts to changing market conditions in real time, optimizing asset allocation and risk management. This agility allows us to capitalize on emerging opportunities and navigate market volatility effectively.

Asset Allocation	Equity	Gold	Glit	Treasury/ cash	IT Nifty	Pharma Nifty	Nasdaq 100	Total
Jul-24	92%	0%	0%	8%	0%	0%	0%	100%
Aug-24	92%	0%	0%	8%	0%	0%	0%	100%
Sep-24	76%	0%	0%	24%	0%	0%	0%	100%
Oct-24	96%	0%	0%	4%	0%	0%	0%	100%
Nov-24	88%	0%	0%	12%	0%	0%	0%	100%
Dec-24	99%	0%	0%	1%	0%	0%	0%	100%
Jan-25	85%	0%	0%	15%	0%	0%	0%	100%
Feb-25	89%	0%	0%	11%	0%	0%	0%	100%
Mar-25	89%	0%	0%	11%	0%	0%	0%	100%
Apr-25	92.75%	0%	0%	7.25%	0%	0%	0%	100%
May-25	91%	0%	0%	9%	0%	0%	0%	100%
Jun-25	91.75%	8.25%	0%	0%	0%	0%	0%	100%

The primary purpose of asset allocation in Ascend is to reduce the risk associated with your investment and provide necessary downside protection.

Returns: Backtesting

We value transparency and accountability. Our investors get access to comprehensive performance reports and real-time insights into their portfolio. Our data-driven process ensures that every decision is backed by robust analytics and clear rationale.

Period	Lowest		Highest		Average	
	Ascend	Nifty	Ascend	Nifty	Ascend	Nifty
1 Month	-10.17%	-26.41%	14.21%	28.07%	3.70%	1.24%
3 Month	-8.65%	-36.81%	32.69%	60.98%	11.46%	3.63%
6 Month	-8.64%	-44.14%	64.13%	68.69%	24.21%	7.12%
1 Year	-0.93%	-52.19%	131.16%	82.67%	54.59%	13.98%
3 Year CAGR	24.34%	-3.88%	76.27%	26.39%	56.34%	10.50%

Key Features of Ascend



Exceptional Returns with
Capital Preservation



Data-Driven Decisions
with AI Precision



Diversification across
Asset Classes



Active
Rebalancing



Transparent
Communication



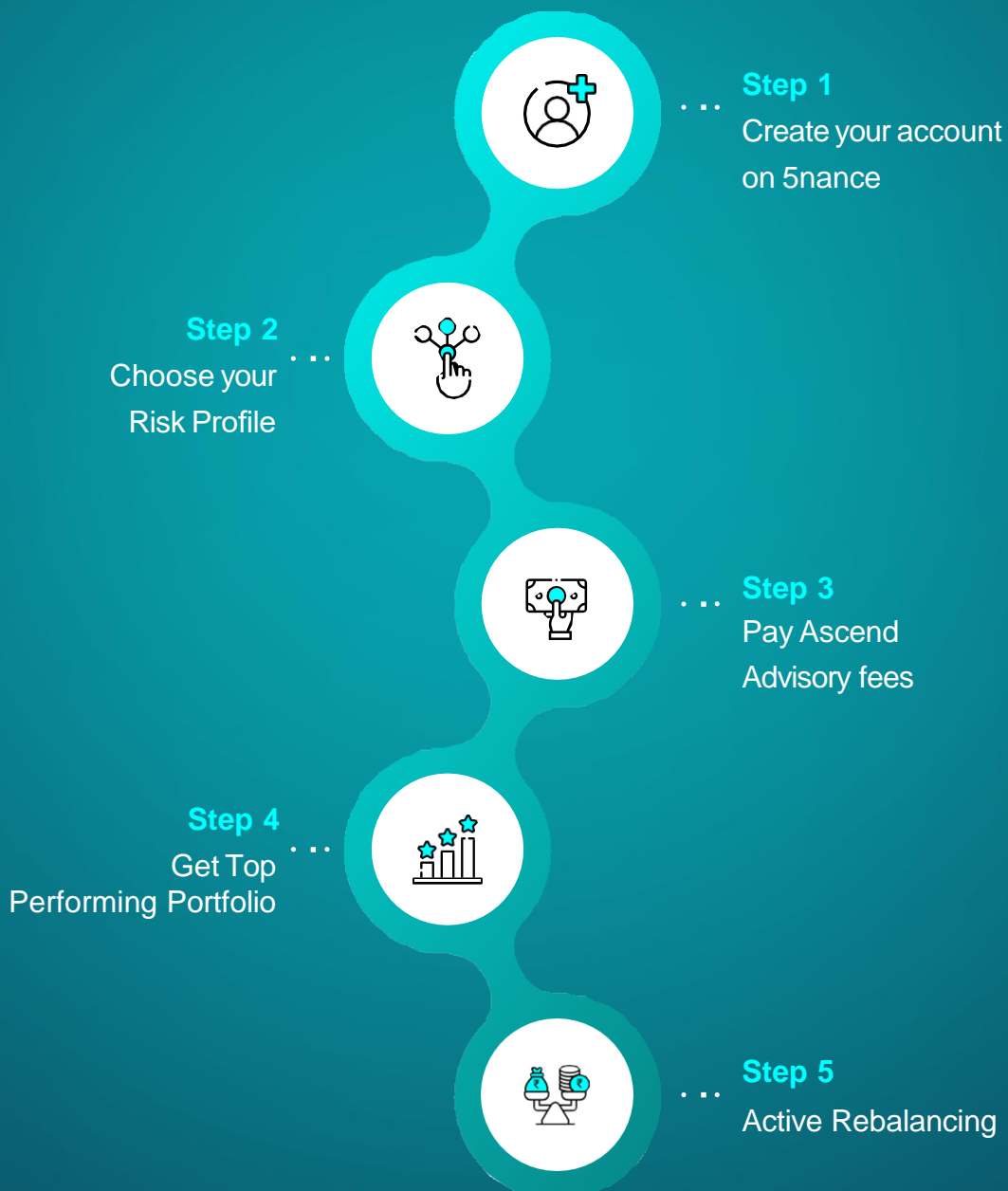
Risk Management
Framework

AI creates a watchlist of stocks that have been performing consistently well to deliver an optimal risk-to-reward ratio.

"To have a balanced investment portfolio, diversification is imperative."

Steps to start investing with Ascend

We offer the best User-Interface on our 5nance App. It is a smooth, hassle-free, and an efficient application where you can manage all your investment transactions for Ascend.



About 5nance

5nance is a SEBI-registered, AI-based Wealth Advisory Services Platform, that enables investors to take advantage of AI-powered Investment through products like All Rounder, Algrow, and FinScore.

Leveraging the capabilities of artificial intelligence, 5nance has engineered investment solutions designed to maximize your financial returns. Our AI-driven algorithms meticulously analyze vast datasets and continuously monitor market dynamics, providing real-time insights.

Through sophisticated machine learning techniques, these systems identify intricate patterns, uncover hidden correlations, and anticipate market movements with remarkable accuracy. The adaptive nature of our AI-powered platform ensures that your investments are expertly navigated even in the most volatile market conditions.



"We optimize operations and improve outcomes with streamlined processes."



Ascend with Confidence and the Power of AI.

The performance of All Rounder is exclusively shared with registered Business Partners of Innovage Investment Advisers Pvt. Ltd for internal circulation purposes only. This data is not intended for acquiring new customers.

DISCLAIMER AND COMPANY INFORMATION

Innovage Investment Advisers Private Limited

SEBI registered Investment Adviser having registration no. INA 000003809 (Valid from 13th Nov 2015 - Perpetual). AMFI Distributor Number: ARN No. 87155. (IRDAI) registration no. CA0339.

Mutual Fund investments are subject to market risks, read all scheme related documents carefully before investing.

Investments in the securities market are subject to market risks, read all the related documents carefully before investing.


Insurance is the subject matter of solicitation.

Registration granted by SEBI, membership of BASL and certification from NISM in no way guarantee performance of the intermediary or provide any assurance of returns to investors.

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