

**REAL RESEARCH
TRUSTWORTHY RESEARCH**



PORTFOLIO MANAGEMENT SERVICES

PMS

Confidential for limited circulation only

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WHAT IS V.A.L.U.E INVESTING - OUR APPROACH



The Five Universal Truth "V A L U E"

Valuation

When to Buy

- DCF valuation
- Graham valuation
- Earning valuation
- Yearly PE ratio
- Quarter trailing PE
- Latest PB ratio
- Price/Sales
- Enterprise Value/EBIT
- EBIT/Enterprise Value

Using Growth

What & Why to Buy

- Sales
- EBIT
- Net Profit
- EPS
- EBIT Margin
- Net Profit Margin

Action Momentum

When to Buy

- 1M, 3M, 6M Performance
- Last 1 Year performance
- 1 Year performance ignoring last 1 month
- No. of days positive price performance in a Year
- Return from 52 week high
- Return from 52 week low
- Support & Resistance levels

Exit or Risk Parameters

What Not to Buy

- High DE ratio
- Promoter Pledge
- Very low Volume or turnover
- Yearly & Quarterly Net loss
- Negative Book Value
- MF Holding - 0 or very low
- Institution Holding - 0
- Quarterly degrowth in Sales & EPS

Long-term Quality

What & Why to Buy

- ROE & ROCE > 15
- Free cash flow > 0
- Debt to Equity Ratio < 0.30

4 GOLDEN RULES OF V.A.L.U.E INVESTING



ROE The key to finding stocks that are lucrative investments in the long run often involves finding companies capable of consistently generating an outsized return on equity over many decades.

FCF having an abundant FCF indicates that a company is capable of paying their monthly dues in case of any external or internal crisis.

DE RATIO A high debt to equity ratio is an indication of low liquidity. It means that the entity is unable to finance its obligations through the cash and reserves and is dependent on the creditors. The probabilities of the entity to go bankruptcy are high.

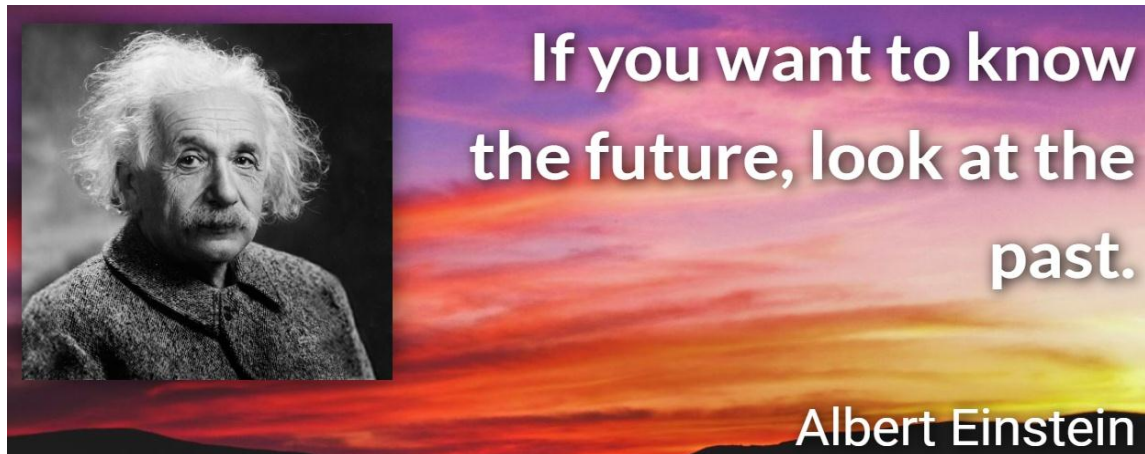
GROWTH of SALES AND EPS To be successful and remain in business, both profitability and growth are important and necessary for a company to survive and remain attractive to investors and analysts. Profitability is, of course, critical to a company's existence, but growth is crucial to long-term survival.

OUR V.A.L.U.E PMS IS BASED ON PREDICTIVE ANALYTICS



Predictive analytics is the use of data, statistical algorithms and machine learning techniques to identify the likelihood of future outcomes of great stocks portfolios based on historical data.

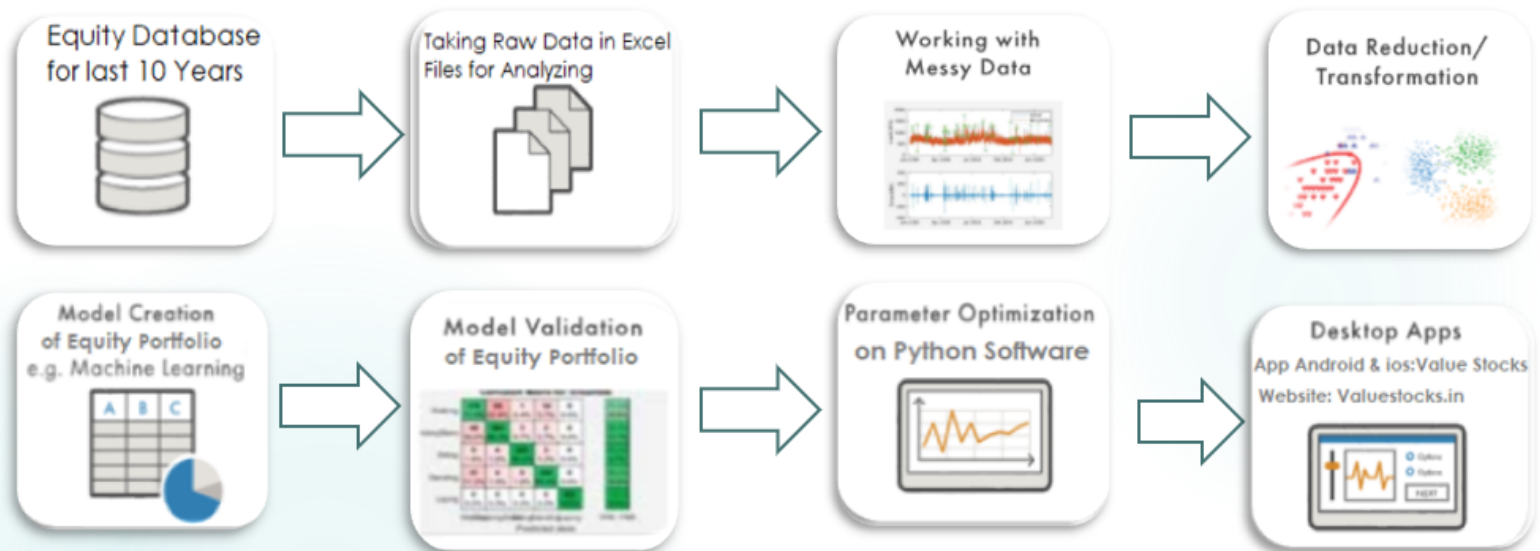
The goal is to go beyond knowing what has happened to providing a best assessment of what will happen in the future of these portfolio stocks.



OUR PREDICTIVE ANALYSIS PROCESS



Our Predictive Analysis Process



AN OVERVIEW OF THE PROCESS



BIG DATA AND PREDICTIVE ANALYSIS

By deeply analyzing financial market data and testing them over 5 years across all market scenarios (bearish, bullish, neutral) and studying investment philosophies of market gurus world over, we've found great stocks to invest in – no need to follow friends, tips, rumors and news

SMART BETA PORTFOLIO STRATEGIES

Our AI powered strategies are centred on basic but powerful fundamentals like RoE, FCF, Sales, Earnings, DE ratio, always giving you quality stocks to invest in. In a clear and transparent manner, know what to buy, when to buy and when to exit, systematically

HIGH RETURNS LOW DRAWDOWNS

The returns from our strategies have been great. This is due to the simple principle of following a time-tested process and repeating it over and over again. These stocks fall lesser when the markets fall and return higher when the indices gain.

BEAT MARKETS BENCHMARKS

The return capacity of our strategies are huge. Almost all our strategies have grown at a CAGR of over 20% and beating the index atleast twice over, in the 5 years we've tested it in.

MEET THE FUND MANAGER



Mr. Shailesh Saraf

Managing Director - Dynamic Equities Pvt Limited

Certification on Value Investing from Columbia University

More than 25 Years Experience



Mr. Shailesh Saraf focuses on generating high alpha at substantially lower risk through his excellently devised strategies and stocks. His emphasis on long term quality and growth as foundational principles for equity investing has greatly benefited the investor community.

Based on artificial intelligence with human touch, his unique predictive analysis gives what stocks to buy, when to buy, how much to buy and when to exit. This has been extensively researched and backtested to create confidence and remove greed and fear from investor mindset.

His YouTube channel has 16000+ subscribers, with 30+ videos & 6.9 lakh+views. His educative, practical & enriching 5 day Online Programme has benefitted many retail Investors and have empowered them with the right knowledge to create long term wealth from the stock market.

THE TEAM



Research and Market Analysis Team

Our dedicated in-house Research Team is passionately driven by Mr. Saraf himself. The team comprises of highly skilled and qualified personnel having specialized degrees in areas related to finance and analytics and stock markets. Great amount of effort and dedication from this team has ensured that our strategies and stock lists give the clients maximum return from the market making them outperform the market benchmarks.

Data Management Team

Data management is the cornerstone for any strategy making or stock filtering process and we have an extremely competent team for that. Data for all NSE listed stocks are sourced and transformed, from being messy to meaningful. Subsequently, parameter optimization is extensively done to give the final list of quality best performing stocks. This whole process is done seamlessly and automatically, everyday. In essence, it's a highly sophisticated robo advisory model system and process. It is functional based on the output which our data management systems give. The uniqueness of our systems lie in the fact that any data - fundamental or relating to price can be accessed by our research team at a click of the mouse making it highly accessible and organised. This in turn has made our research more accurate and efficient.

HOW CAN CUSTOMERS CHOOSE THE STRATEGIES FOR PMS



(A) On the basis of Market Cap

Smallcap, Midcap, Largecap, Multicap, Large and Mid, Mid and Small

(A) On the basis of Holding Period

Quarterly, Annual

(A) On the basis of themes

Highest Return Strategies

Lowest Risk Strategies

Quality stocks which are undervalued

Quality stocks with Growing companies

Quality stocks with high price performance

HOW CAN CUSTOMERS CHOOSE THE STRATEGY

(A) THEME - MARKET CAP



Smallcap – 2 Strategies

Strategies	5 Year Return%	5 Year CAGR	Market Type	Covid Drawdown in 5 Years	2nd Highest Drawdown in 5 Years
Small Cap Growth Strategy Quarterly	152.37%	30.42%	Smallcap	-44.57%	-18.91%
Small Cap Growth Strategy Inspired By William O Neil Quarterly	124.33%	22.45%	Smallcap	-43.28%	-23.57%

Midcap – 3 Strategies

Strategies	5 Year Return%	5 Year CAGR	Market Type	Covid Drawdown in 5 Years	2nd Highest Drawdown in 5 Years
Mid Cap Price Momentum	147.56%	29.52%	Midcap	-40.87%	-16.58%
Mid Cap Growth Strategy Quarterly	131.71%	25.91%	Midcap	-39.35%	-15.83%
Mid Cap Long Term Growth Strategy	86.65%	16.91%	Midcap	-20.95%	-17.79%

Largecap – 2 Strategies

Strategies	5 Year Return%	5 Year CAGR	Market Type	Covid Drawdown in 5 Years	2nd Highest Drawdown in 5 Years
Large Cap 100 Growth Strategy Quarterly	138.20%	28.43%	Largecap	-33.12%	-14.90%
Top 50 Large Cap Growth Strategy Quarterly	96.41%	17.62%	Largecap	-43.28%	-20.47%

HOW CAN CUSTOMERS CHOOSE THE STRATEGY

(A) THEME - MARKET CAP ... CONTD



Multicap – 3 Strategies

Strategies	5 Year Return%	5 Year CAGR	Market Type	Covid Drawdown in 5 Years	2nd Highest Drawdown in 5 Years
Valuation Strategy inspired by Kenneth Fisher	137.86%	26.03%	Multicap	-43.24%	-16.83%
Best As Per Mf Buying Multi Cap	132.87%	25.48%	Multicap	-38.89%	-20.30%
Multicap Growth Strategy	109.74%	21.58%	Multicap	-39.35%	-15.83%

Large and Mid – 6 Strategies

Strategies	5 Year Return%	5 Year CAGR	Market Type	Covid Drawdown in 5 Years	2nd Highest Drawdown in 5 Years
Long term Quality Startegy inspired by Warren Buffett-Large & Mid Cap	111.39%	21.69%	Large & Mid Cap	-18.00%	-7.55%
Momentum Strategy Inspired By George And Hwang- Large And Mid Cap	98.45%	19.09%	Large & Mid Cap	-31.28%	-6.94%
Momentum Strategy Inspired By Pim Van Vliet-Large And Mid Cap	82.59%	16.21%	Large & Mid Cap	-12.99%	-10.17%
Momentum Strategy Inspired By Wesley Gray- Large And Mid Cap	77.53%	15.03%	Large & Mid Cap	-17.82%	-14.78%
Momentum Strategy Inspired By Narsimhan Jagdish	74.03%	14.18%	Large & Mid Cap	-20.82%	-11.41%
Large Mid Coffee Can Strategy	53.64%	10.22%	Large & Mid Cap	-24.91%	-15.77%

HOW CAN CUSTOMERS CHOOSE THE STRATEGY

(A) THEME - MARKET CAP ... CONTD



Mid and Small – 2 Strategies

Strategies	5 Year Return%	5 Year CAGR	Market Type	Covid Drawdown in 5 Years	2nd Highest Drawdown in 5 Years
Valuation Strategy Inspired By Sunil Singhania-Mid & Small Cap	155.93%	29.19%	Mid & Small Cap	-47.25%	-6.26%
Valuation Strategy Inspired By Benjamin Graham (Father Of Value Investing)-Mid And Small Cap	134.72%	23.42%	Mid & Small Cap	-52.49%	-9.76%

HOW CAN CUSTOMERS CHOOSE THE STRATEGY

(B) THEME - HOLDING PERIOD



Quarterly holding period – 8 Strategies

Strategies	5 Year Return%	5 Year CAGR	Market Type	Covid Drawdown in 5 Years	2nd Highest Drawdown in 5 Years
Small Cap Growth Strategy Quarterly	152.37%	30.42%	Smallcap	-44.57%	-18.91%
Mid Cap Price Momentum	147.56%	29.52%	Midcap	-40.87%	-16.58%
Large Cap 100 Growth Strategy Quarterly	138.20%	28.43%	Largecap	-33.12%	-14.90%
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Small Cap Growth Strategy Inspired By William O Neil	124.33%	22.45%	Smallcap	-43.28%	-23.57%
Multicap Growth Strategy	109.74%	21.58%	Multicap	-39.35%	-15.83%
Top 50 Large Cap Growth Strategy Quarterly	96.41%	17.62%	Largecap	-43.28%	-20.47%

HOW CAN CUSTOMERS CHOOSE THE STRATEGY

(B) THEME - HOLDING PERIOD ...CONTD



Annual holding period – 10 Strategies

Strategies	5 Year Return%	5 Year CAGR	Market Type	Covid Drawdown in 5 Years	2nd Highest Drawdown in 5 Years
Valuation Strategy Inspired By Sunil Singhania-Mid & Small Cap	155.93%	29.19%	Mid & Small Cap	-47.25%	-6.26%
Valuation Strategy inspired by Kenneth Fisher	137.86%	26.03%	Multicap	-43.24%	-16.83%
Valuation Strategy Inspired By Benjamin Graham (Father Of Value Investing)-Mid And Small Cap	134.72%	23.42%	Mid & Small Cap	-52.49%	-9.76%
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Momentum Strategy Inspired By Narsimhan Jagdish	74.03%	14.18%	Large & Mid Cap	-20.82%	-11.41%
Large Mid Coffee Can Strategy	53.64%	10.22%	Large & Mid Cap	-24.91%	-15.77%

HOW CAN CUSTOMERS CHOOSE THE STRATEGY

(C) THEME – HIGHEST RETURNS



Highest Returns – 18 Strategies

No.	Strategies	5 Year Return%	5 Year CAGR	Holding Period	Market Type	Covid Drawdown in 5 Years	2nd Highest Drawdown in 5 Years
1	Valuation Strategy Inspired By Sunil Singhania-Mid & Small Cap	155.93%	29.19%	Annual	Mid & Small Cap	-47.25%	-6.26%
2	Small Cap Growth Strategy Quarterly	152.37%	30.42%	Quarterly	Smallcap	-44.57%	-18.91%
3	Mid Cap Price Momentum	147.56%	29.52%	Quarterly	Midcap	-40.87%	-16.58%
4	Large Cap 100 Growth Strategy Quarterly	138.20%	28.43%	Quarterly	Largecap	-33.12%	-14.90%
5	Valuation Strategy inspired by Kenneth Fisher	137.86%	26.03%	Annual	Multicap	-43.24%	-16.83%
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7	Best As Per Mf Buying Multi Cap	132.87%	25.48%	Quarterly	Multicap	-38.89%	-20.30%
8	Mid Cap Growth Strategy Quarterly	131.71%	25.91%	Quarterly	Midcap	-39.35%	-15.83%
9	Small Cap Growth Strategy Inspired By William O Neil	124.33%	22.45%	Quarterly	Smallcap	-43.28%	-23.57%
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16	Momentum Strategy Inspired By Wesley Gray- Large And Mid Cap	77.53%	15.03%	Annual	Large & Mid Cap	-17.82%	-14.78%
17	Momentum Strategy Inspired By Narsimhan Jagdish	74.03%	14.18%	Annual	Large & Mid Cap	-20.82%	-11.41%
18	Large Mid Coffee Can Strategy	53.64%	10.22%	Annual	Large & Mid Cap	-24.91%	-15.77%

HOW CAN CUSTOMERS CHOOSE THE STRATEGY

(C) THEME – LOWEST RISK



Lowest Risk – 18 Strategies

No.	Strategies	5 Year Return%	5 Year CAGR	Holding Period	Market Type	Covid Drawdown in 5 Years
1	Momentum Strategy Inspired By Pim Van Vliet-Large And Mid Cap	82.59%	16.21%	Annual	Large & Mid Cap	-12.99%
2	Momentum Strategy Inspired By Wesley Gray- Large And Mid Cap	77.53%	15.03%	Annual	Large & Mid Cap	-17.82%
3	Long term Quality Startegy inspired by Warren Buffett-Large & Mid Cap	111.39%	21.69%	Annual	Large & Mid Cap	-18.00%
4	Momentum Strategy Inspired By Narsimhan Jagdish	74.03%	14.18%	Annual	Large & Mid Cap	-20.82%
5	Mid Cap Long Term Growth Strategy	86.65%	16.91%	Annual	Midcap	-20.95%
6	Large Mid Coffee Can Strategy	53.64%	10.22%	Annual	Large & Mid Cap	-24.91%
7	Momentum Strategy Inspired By George And Hwang- Large And Mid Cap	98.45%	19.09%	Annual	Large & Mid Cap	-31.28%
8	Large Cap 100 Growth Strategy Quarterly	138.20%	28.43%	Quarterly	Largecap	-33.12%
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HOW CAN CUSTOMERS CHOOSE THE STRATEGY

(C) THEME - QUALITY STOCKS WHICH ARE UNDERVALUED



Quality Stocks which are undervalued – 3 Strategies

Strategies	5 Year Return%	5 Year CAGR	Holding Period	Market Type	Covid Drawdown in 5 Years
Valuation Strategy Inspired By Sunil Singhanian-Mid & Small Cap	155.93%	29.19%	Annual	Mid & Small Cap	-47.25%
Valuation Strategy inspired by Kenneth Fisher	137.86%	26.03%	Annual	Multicap	-43.24%
Valuation Strategy Inspired By Benjamin Graham (Father Of Value Investing)-Mid And Small Cap	134.72%	23.42%	Annual	Mid & Small Cap	-52.49%

HOW CAN CUSTOMERS CHOOSE THE STRATEGY

(C) THEME – QUALITY STOCKS WITH HIGH PRICE PERFORMANCE



Quality Stocks with High Performance – 5 Strategies

Strategies	5 Year Return%	5 Year CAGR	Holding Period	Market Type	Covid Drawdown in 5 Years
Mid Cap Price Momentum	147.56%	29.52%	Quarterly	Midcap	-40.87%
Momentum Strategy Inspired By George And Hwang- Large And Mid Cap	98.45%	19.09%	Annual	Large & Mid Cap	-31.28%
Momentum Strategy Inspired By Pim Van Vliet-Large And Mid Cap	82.59%	16.21%	Annual	Large & Mid Cap	-12.99%
Momentum Strategy Inspired By Wesley Gray- Large And Mid Cap	77.53%	15.03%	Annual	Large & Mid Cap	-17.82%
Momentum Strategy Inspired By Narsimhan Jagdish	74.03%	14.18%	Annual	Large & Mid Cap	-20.82%

HOW CAN CUSTOMERS CHOOSE THE STRATEGY

(C) THEME – QUALITY STOCKS OF GROWING COMPANIES



Quality Stocks of Growing companies – 10 Strategies

Strategies	5 Year Return%	5 Year CAGR	Holding Period	Market Type	Covid Drawdown in 5 Years
Small Cap Growth Strategy Quarterly	152.37%	30.42%	Quarterly	Smallcap	-44.57%
Large Cap 100 Growth Strategy Quarterly	138.20%	28.43%	Quarterly	Largecap	-33.12%
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Large Mid Coffee Can Strategy	53.64%	10.22%	Annual	Large & Mid Cap	-24.91%

OUR PMS RETURNS COMPARED TO BENCHMARK



Year	Dynamic PMS Small cap Return	Benchmark - Nifty Small cap Return
2017-2018	28.08%	12.74%
2018-2019	-15.79%	-11.25%
2019-2020	-3.56%	-51.28%
Total	8.79%	-49.79%

OUR CUSTODIAN



- As per SEBI, all PMS clients' funds and securities have to be administered by Custodians only.
- There are 19 SEBI Registered Custodians .
- Our Custodian is Orbis Financial Corporation Limited.

FEE STRUCTURE – PMS CHARGES



Options	Only Management Fees (Option 1)			Only Profit Sharing (Option 2)			Both Management Fees & Profit Sharing (Option 3)		
Investment Amount (Rs)	Upto 1cr (Min 50 Lakhs)	Upto 2 Crore	Above 2 Crores	Upto 1cr (Min 50 Lakhs)	Upto 2 Crore	Above 2 Crores	Upto 1cr (Min 50 Lakhs)	Upto 2 Crore	Above 2 Crores
Annual Management Fees to be levied monthly	3.00% pa	2.50% pa	2.00% pa	-	-	-	1.50% pa	1.25% pa	1.00% pa
Performance Fee (Over and Above Hurdle Rate-10%)	-	-	-	20%*	17.5%*	15%*	15%**	12.5%**	10%**
Exit Fees	No Exit Fees								

* In Only Profit Sharing no hurdle rate will be applicable straight profits will be shared

** If Client opt for both Management fees & Profit Sharing 10% hurdle rate will be applicable

Brokerage will be applicable as per actual

PMS CUSTODY AND OTHER CHARGES

Sr.	Particulars	Rates
1.	Annual custody charges (calculated on average Asset under Custody) Annual Maintenance Charges for DP Demat Transaction Fees –Market Sale	0.05% p.a. Rs. 500/- pa for Individual Rs. 1000/- pa for Non-Individual Rs. 8/- per ISIN
2.	Clearing, Settlement and subscription Charges <ul style="list-style-type: none"> · Cash Market · Derivatives (F&O) · Liquid Bees · Mutual Funds · Others (IPO, Debt, etc) 	0.01% of transaction value 0.0005% of transaction value NIL Rs. 100/- per txn Rs. 100/- per txn
3.	SEBI Charges (At actuals)	0.0005% on AUC p.a.
4.	Misc. Expenses (viz. charges for CA certificate, consultant fees, courier charges, stamp paper charges etc.)	To be reimbursed on actual basis subject on production of bills (The CA fees is Rs. 1500/- plus taxes)
5.	Taxes, Regulatory levies	Actuals, as applicable

GETTING STARTED!



How does Dynamic Equities (Value stocks) PMS Work-

- Step 1 Meeting between the Fund Manager Shailesh Saraf and Client to finalise Strategy
- Step 2 The Portfolio of Stocks will be discussed with the customer according to the strategy decided by the customer
- Step 3 Demat Account of customer will be opened with the custodian
- Step 4 PMS Account will be opened with Dynamic Equities – Portfolio Manager
- Step 5 The client needs to give funds directly to custodian at "Dynamic Equities Pvt Ltd" bank account operated and managed by custodian only.
- Step 6 The broker will execute the trades
- Step 7 Reports and trading data can be accessed anytime via custodian provided online portal

CONTACT US



DYNAMIC EQUITIES PVT. LTD.

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Youtube : Shailesh Saraf

App : Value Stocks (Android, iOS)

Twitter : Dynamiclevels

Facebook: Dynamic Levels for Investing

SEBI Registration No. : INZ000193533(NSE/BSE/MCX)

Investment Advisory Reg : INA300002022

PMS Reg. No : INP000003468

DP Reg. No : IN-DP-CDSL-192-2002

CIN :U67190WB1999PTC090087

Mutual Fund -

ARN No : 124058

ARN Name : Dynamic Equities
Pvt Ltd

EUIN No : E197719

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There is no guarantee of profits or no exceptions from losses. The investment advice provided are solely the personal views of the research team. You are advised to rely on your own judgment while making investment / Trading decisions. Past performance is not an indicator of future returns. Investment is subject to market risks. You should read and understand the Risk Disclosure Documents before trading/Investing.

Disclosure: We, Dynamic Equities Private Limited are also engaged in Proprietary Trading apart from Client Business. In case of any complaints/grievances, clients may write to us at compliance@dynamiclevels.com