

WELCOME TO



**USER GUIDE**

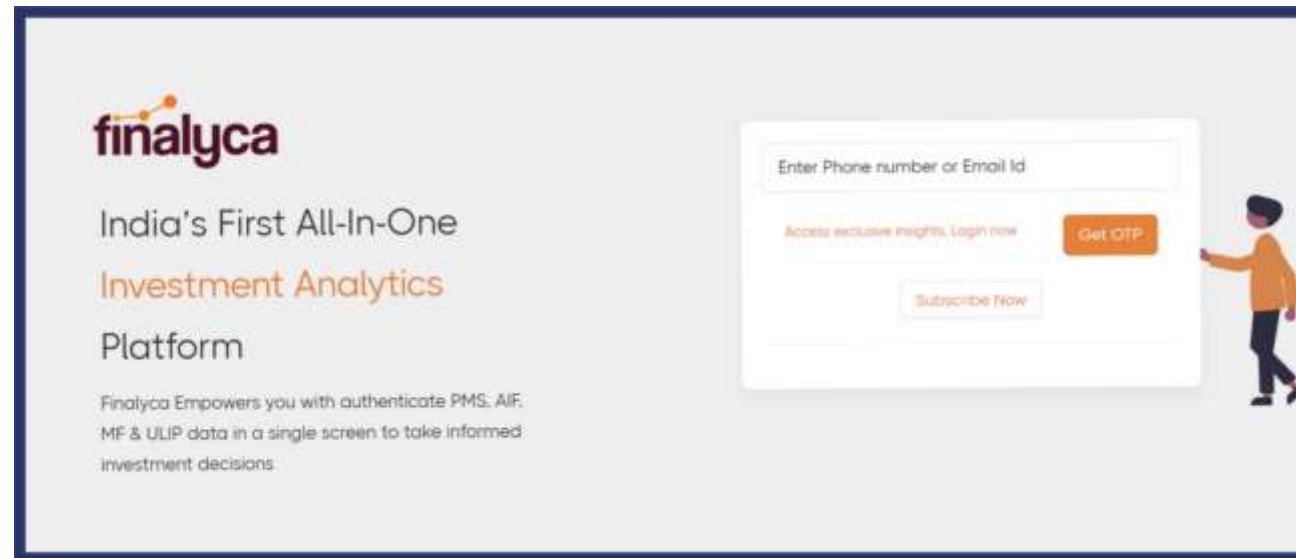
## **CONTENT**

## **PAGE**

Creating an account	3
Dashboard	4
Fund Coverage	5
Exploring Fund Coverage	6
Exploring a particular AMC	7
Exploring the schemes in an AMC	8-9
Exploring the overview tab in a scheme	10-12
Exploring the performance and risk analysis in a scheme	13-16
Exploring detailed portfolio in a scheme	17
Exploring trend analysis in a scheme	18
Exploring attribution in a scheme	19-20
Exploring Funds in this category	21
Exploring Directory on dashboard	22-23
Exploring Analytics on dashboard	24-38

## STEP 1

### Opening an account



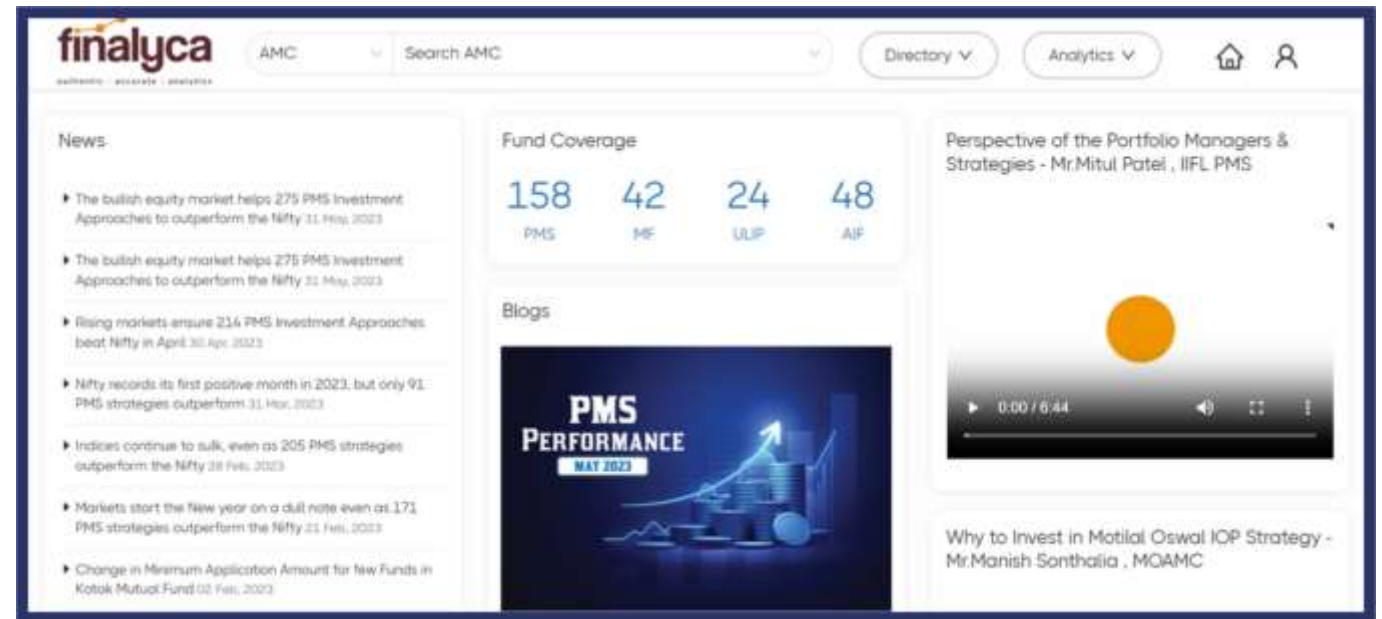
- Visit [www.finalyca.com](http://www.finalyca.com) to view our website.
- On the homepage's upper right corner, click the "Sign Up" button.
- Give the registration form your name, email address, and password along with other personal information.
- Click the "Create Account" button after you have accepted the terms and conditions.
- Congratulations! On our website, you have successfully made an account.

## STEP 2

### Exploring Dashboard Features

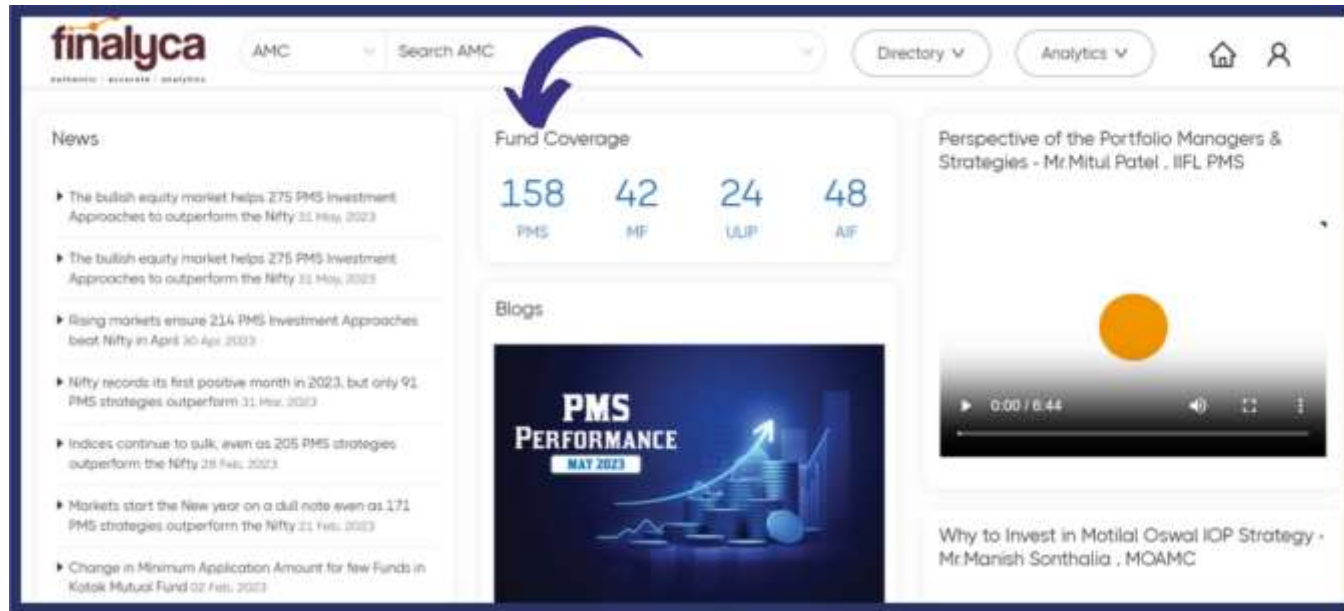


- Utilize the OTP you were sent to log into your account.
- The dashboard, which serves as the main hub for managing your financial operations, will be routed to you.
- Spend a moment becoming acquainted with the many elements offered, including news, fund coverage, a directory, and statistics.



## STEP 3

### Exploring Fund Coverage Part

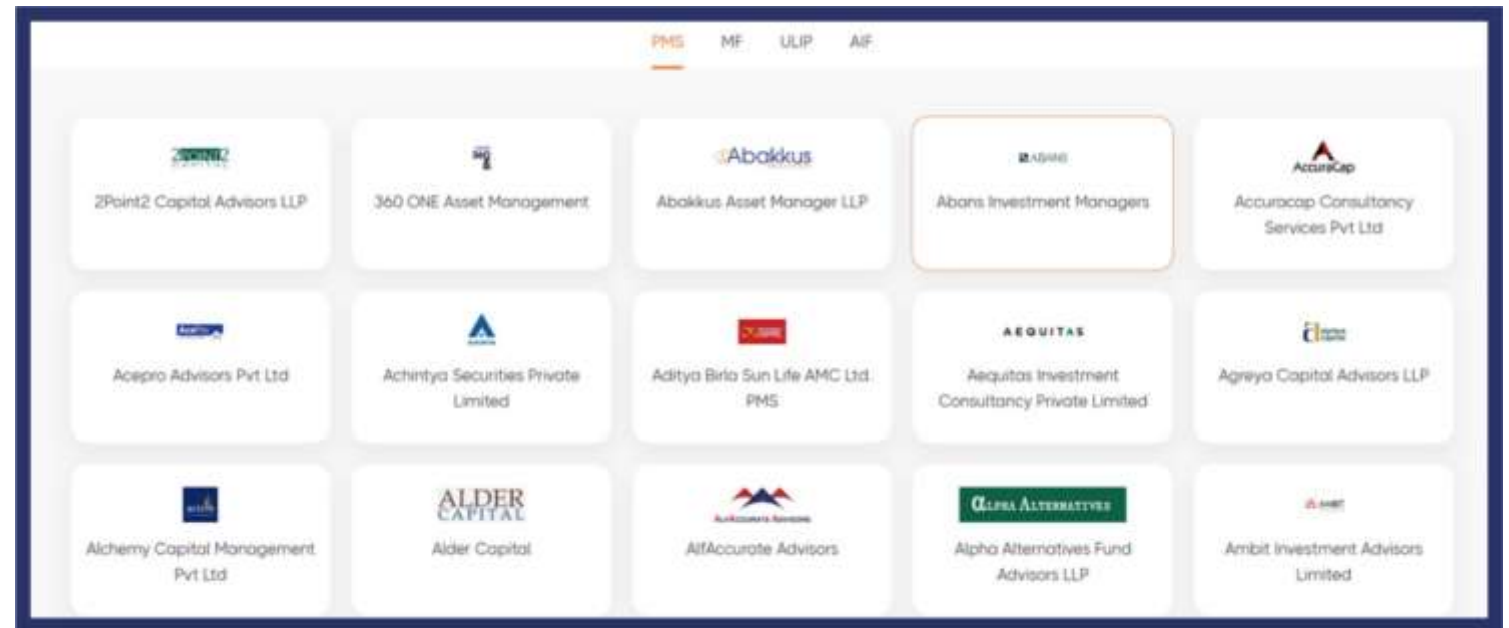


After exploring the dashboard, click the fund coverage area to learn more about all the Portfolio Management Services plans, Mutual Funds, Unit Linked Insurance Premiums, and Alternative Investment Funds.

## STEP 4

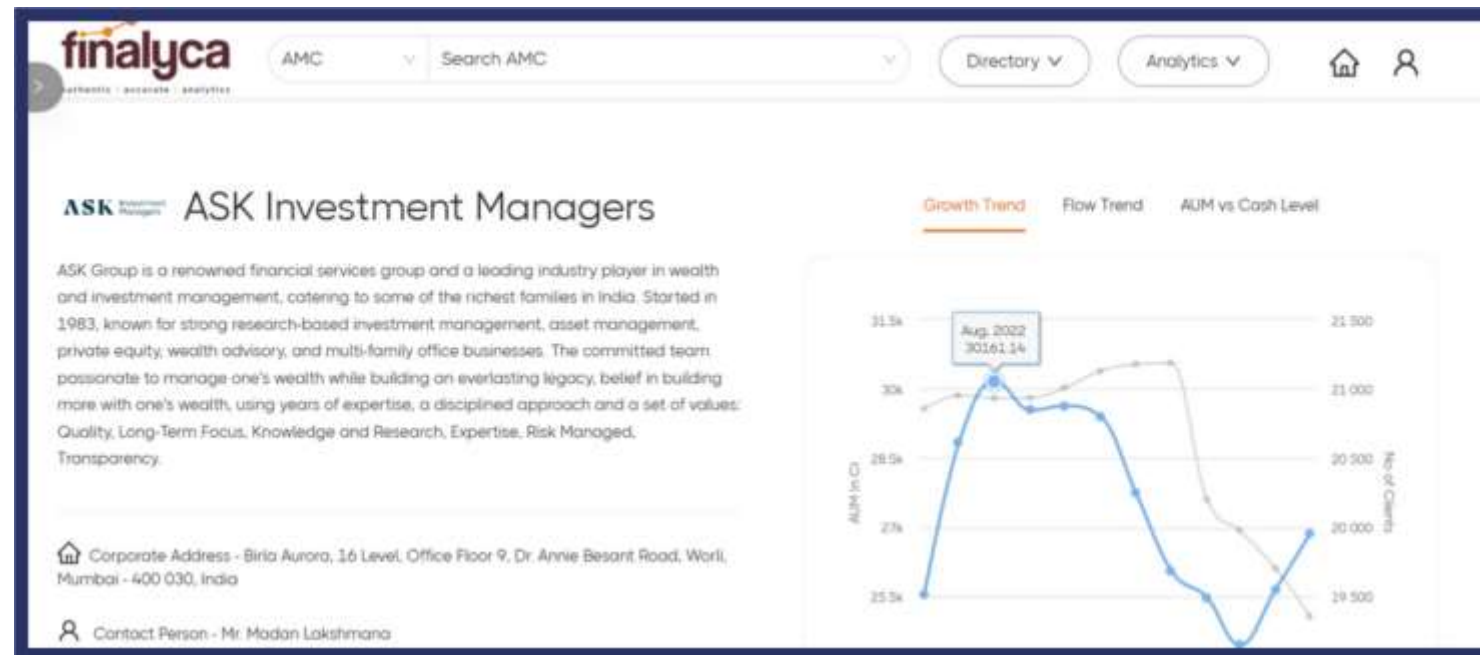
### Exploring Fund Coverage Part

After selecting the fund coverage section, you may view every Portfolio Management Scheme that the website offers.



## STEP 5

### Exploring a particular AMC

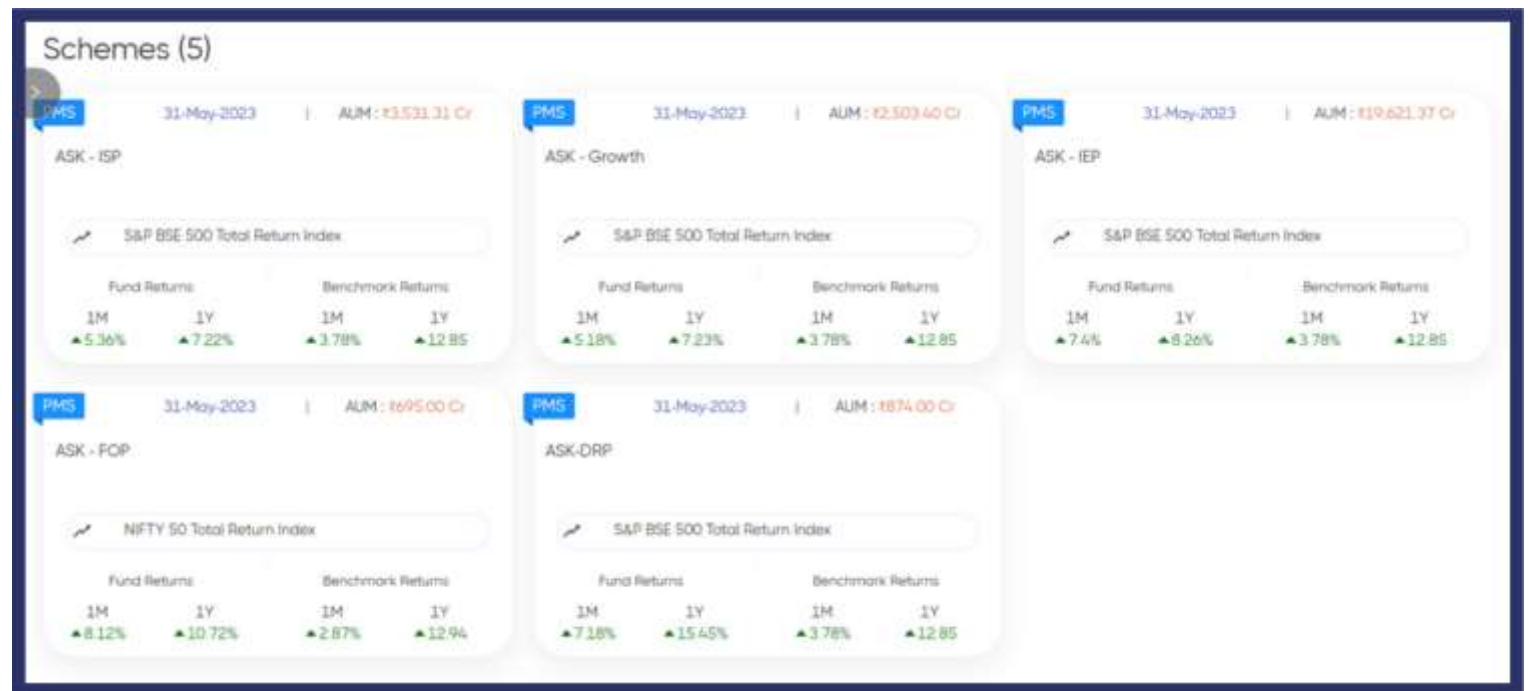


After seeing every fund house listed in the fund coverage section, you can click on a specific AMC to examine more information about it. Here, you can also check out the graphs on the dashboard of that AMC, which show discrepancies between AUM and Cash Level as well as graphs showing growth and flow trends.

## STEP 6

### Exploring the schemes in an AMC

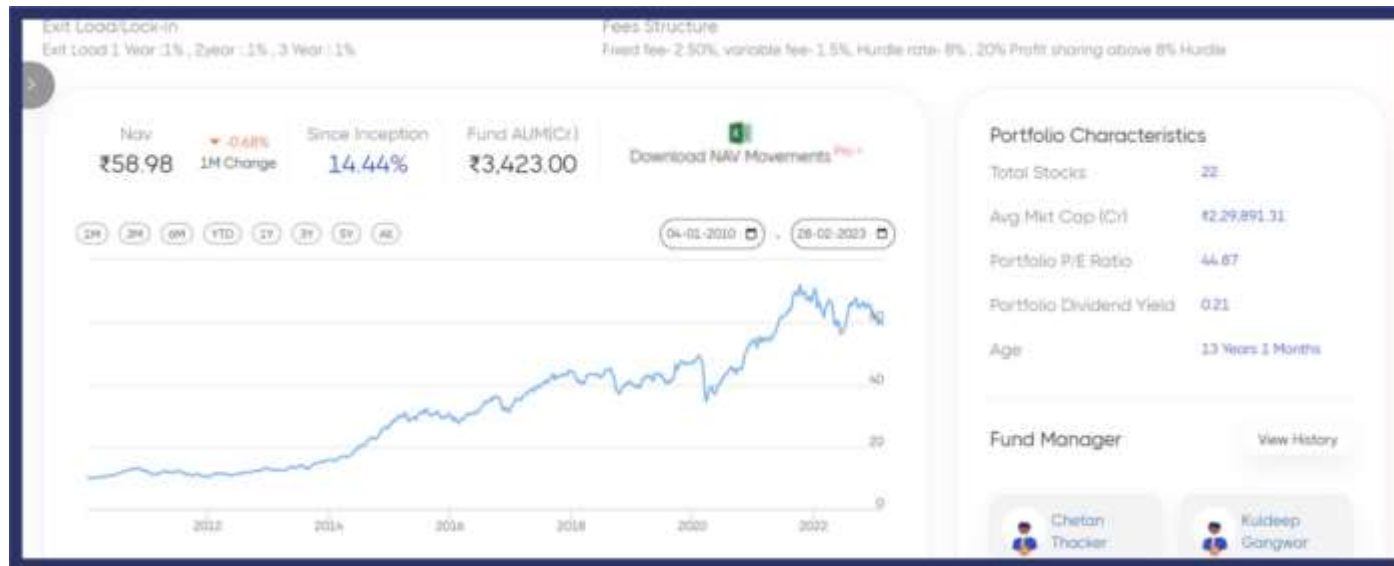
After learning more about a specific AMC, you may scroll down the page to see the specific schemes that AMC has to offer.





## STEP 7

### Exploring a scheme in an AMC

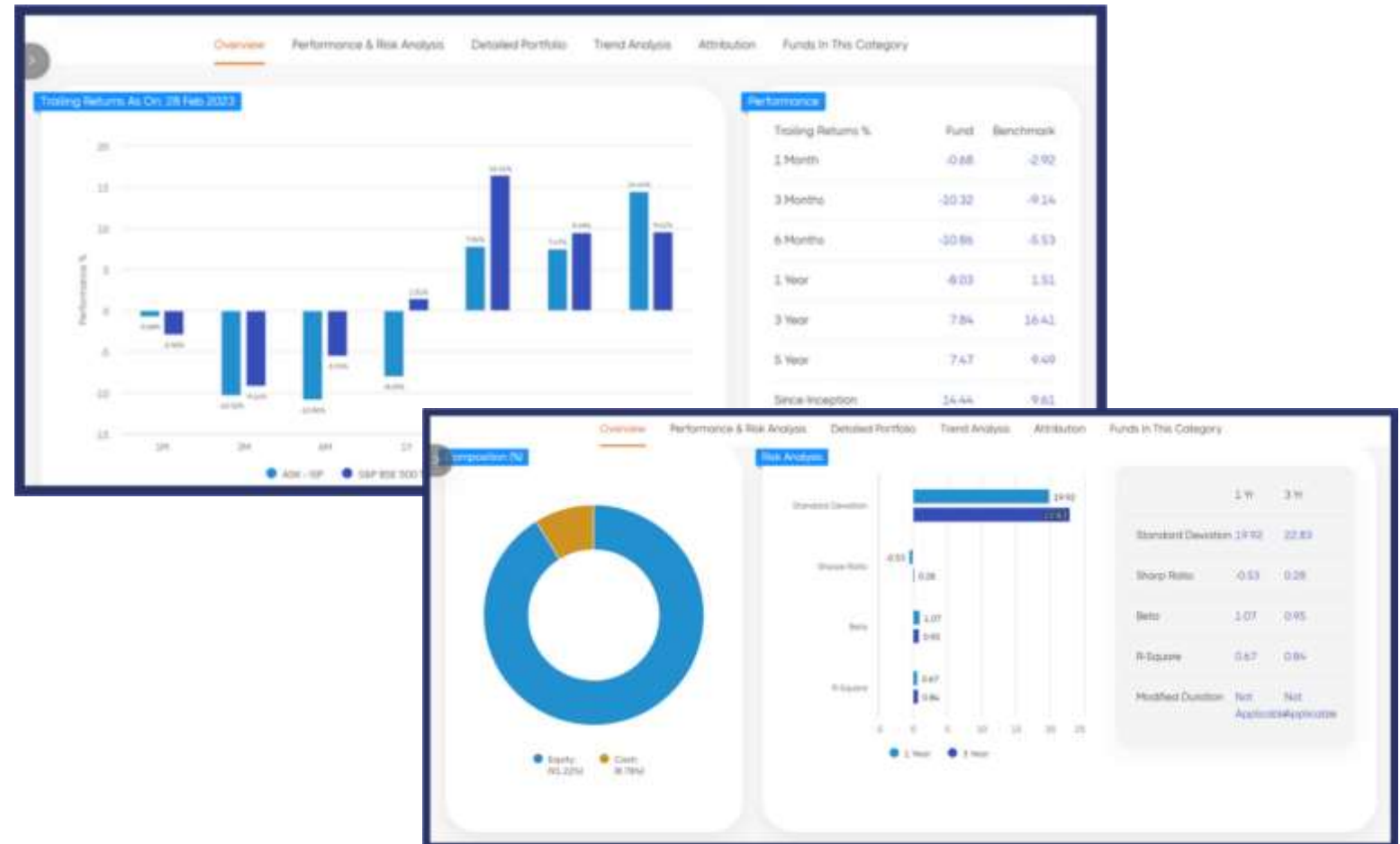


The full details of a scheme, including the NAV, fund AUM, total number of stocks in the scheme, average market cap, portfolio p/e ratio, portfolio dividend yield, scheme age, and fund managers, are now viewable once you click into a specific scheme.

## STEP 7

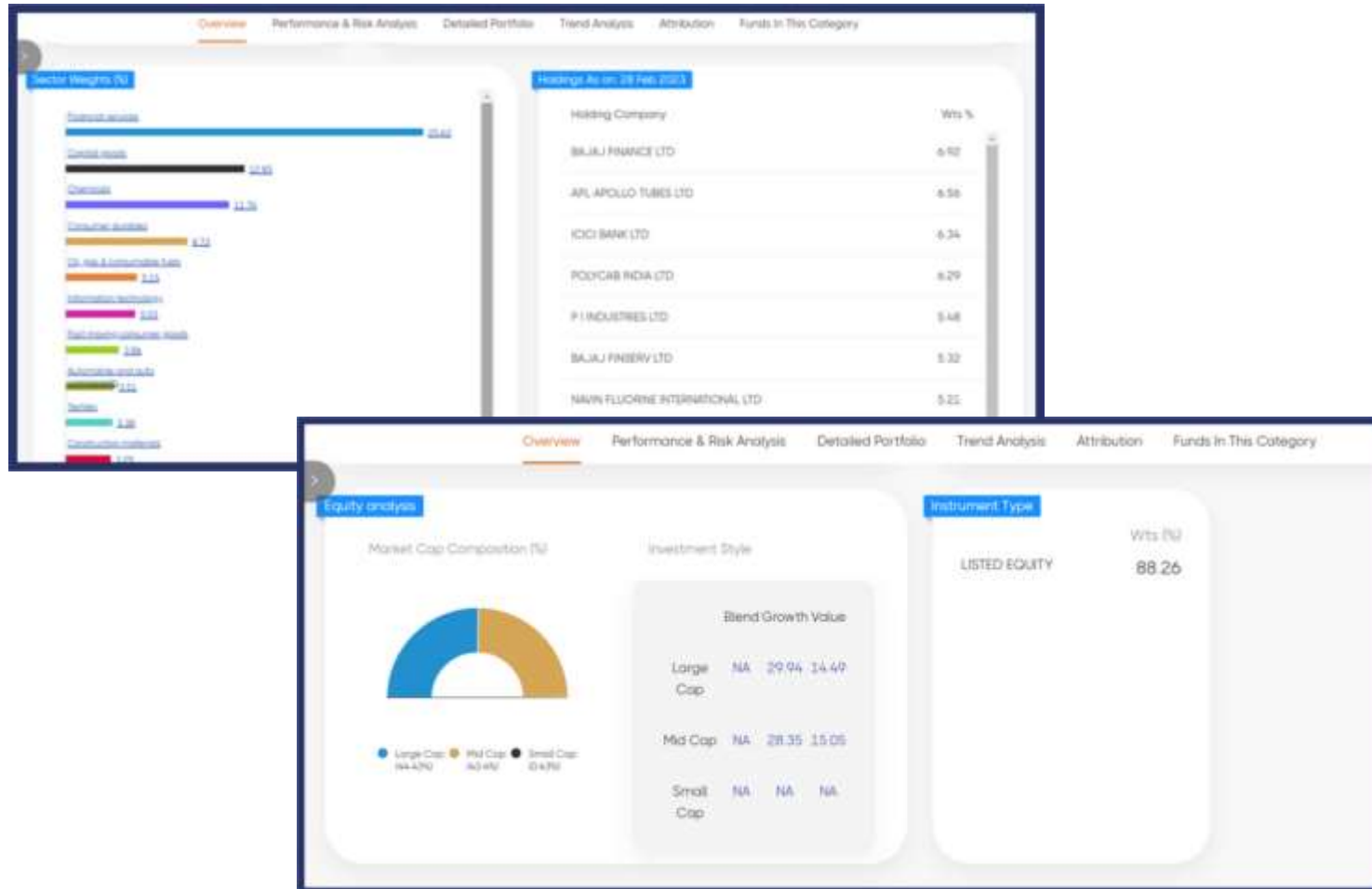
### Exploring the overview tab in a scheme

The overview tab, which is visible as you scroll down in the scheme, contains the trailing returns, performance returns, composition%, and risk analysis information of a certain scheme.



## STEP 7

### Exploring the overview tab in a scheme



The Overview page, which is visible as you scroll down in the scheme, displays the sector weights, holdings, equity analysis, and the type of instrument that the scheme is invested in.

## STEP 7

### Exploring the overview tab in a scheme

When you scroll down in the scheme, you'll notice the overview page, which shows the exposures' increase and decrease as well as any new entries and exits.

The screenshot displays the 'Overview' tab of a financial scheme's portfolio holdings. The main section is titled 'Change in Portfolio Holdings' and is divided into four panels:

- Increase in Exposure (%)**: A table showing the increase in current weight exposure for five securities.
- Decrease in Exposure (%)**: A table showing the decrease in current weight exposure for five securities.
- New Entrants**: A panel indicating 'No Data' with a printer icon.
- Complete Exit**: A panel showing one security, 'Dixon Technologies (India) Ltd'.

Below the tables is a disclaimer: 'Disclaimer & Risk Factors: Performance may or may not be sustained in future and should not be used as a basis for comparison with other investments. Theme of the Scheme/Strategies does not in any manner indicate its future prospects and returns. Data used is'.

Security Name	Increase in Current Wts. Exposure (%)	(%)
Bajaj Finance Ltd	▲ 0.30%	6.92%
APL Apollo Tubes Ltd	▲ 0.27%	6.56%
Navin Fluorine International Ltd	▲ 0.26%	6.21%
P J Industries Ltd	▲ 0.22%	5.48%
Asian Paints Ltd	▲ 0.28%	5.9%

Security Name	Decrease in Current Wts. Exposure (%)	(%)
Aarti Industries Ltd	▼ -1.94%	1.07%
Divis Laboratories Ltd	▼ -1.29%	2.83%
Polycab India Ltd	▼ -0.98%	6.29%
ICICI Bank Ltd	▼ -0.43%	6.34%
Patanjali Foods Ltd	▼ -0.42%	3.86%

Security Name
Dixon Technologies (India) Ltd

## STEP 8

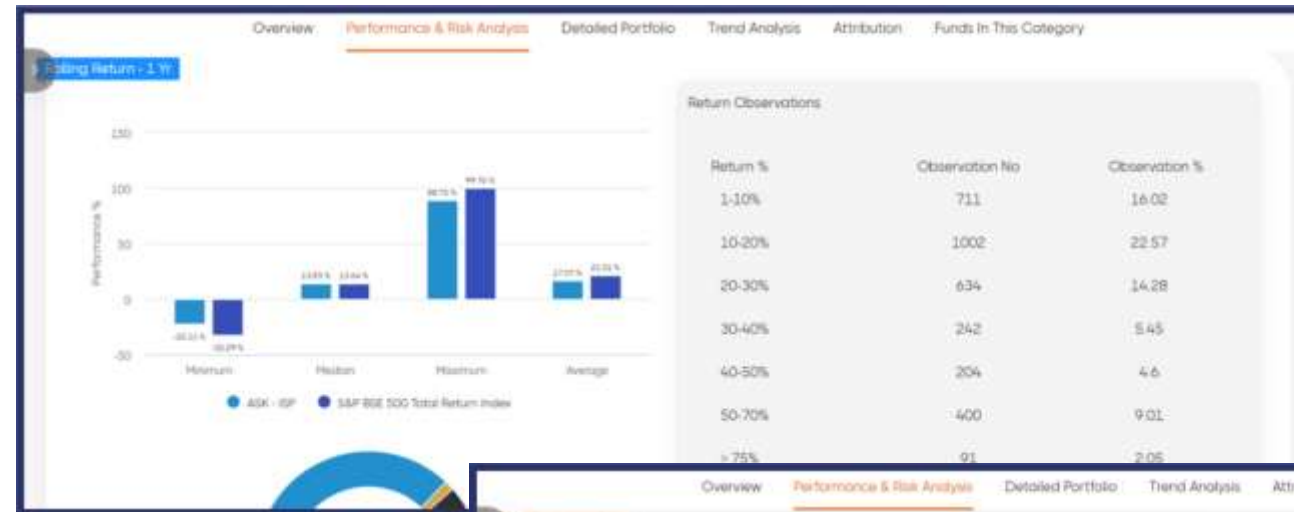
### Exploring the performance and risk analysis tab in a scheme



Now, we switch to the performance and risk analysis tab, where you can observe the scheme's performance trend.

## STEP 8

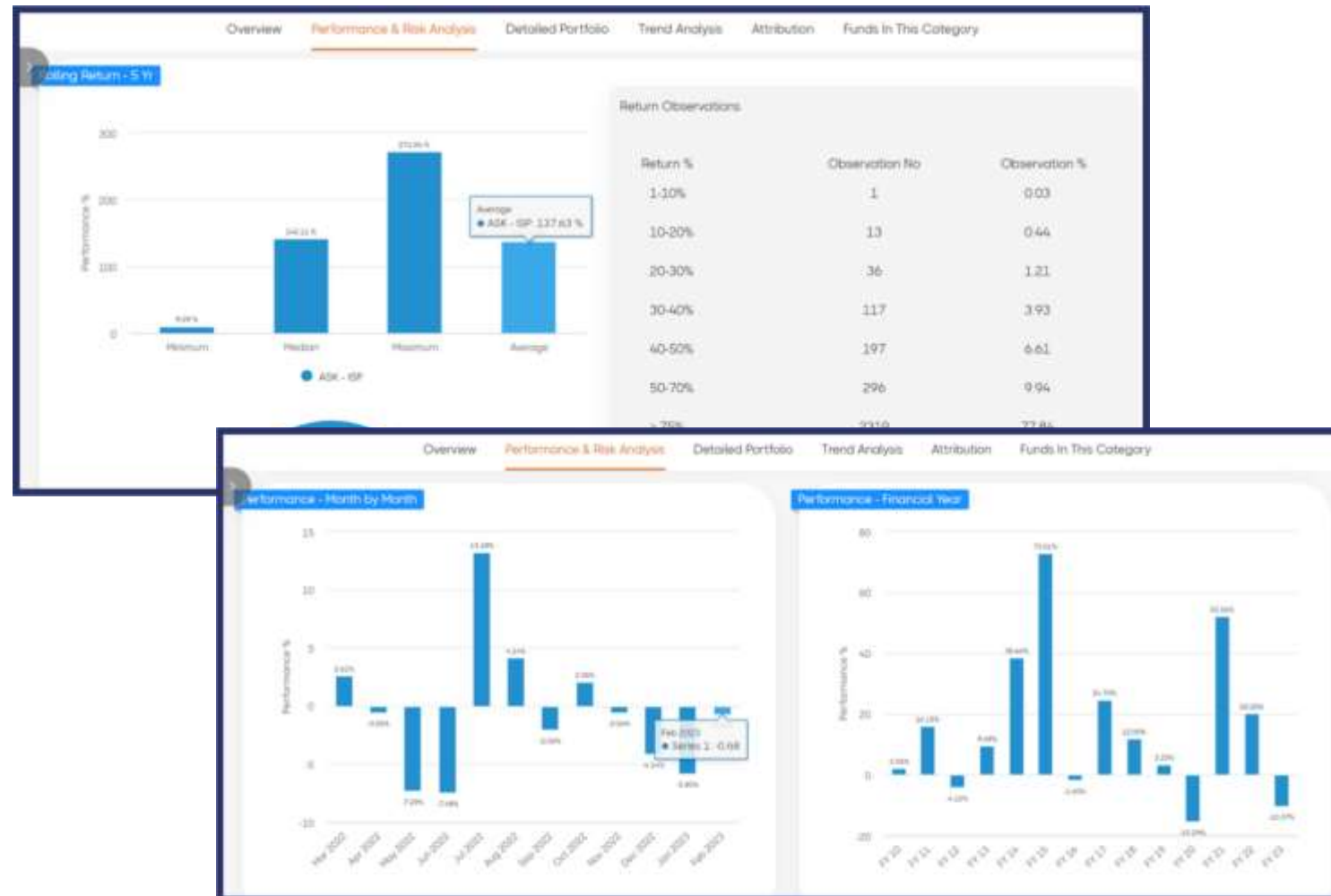
### Exploring the performance and risk analysis tab in a scheme



The rolling returns for the scheme's first and third years are visible when you scroll down to the performance and risk analysis page.

## STEP 8

### Exploring the performance and risk analysis tab in a scheme

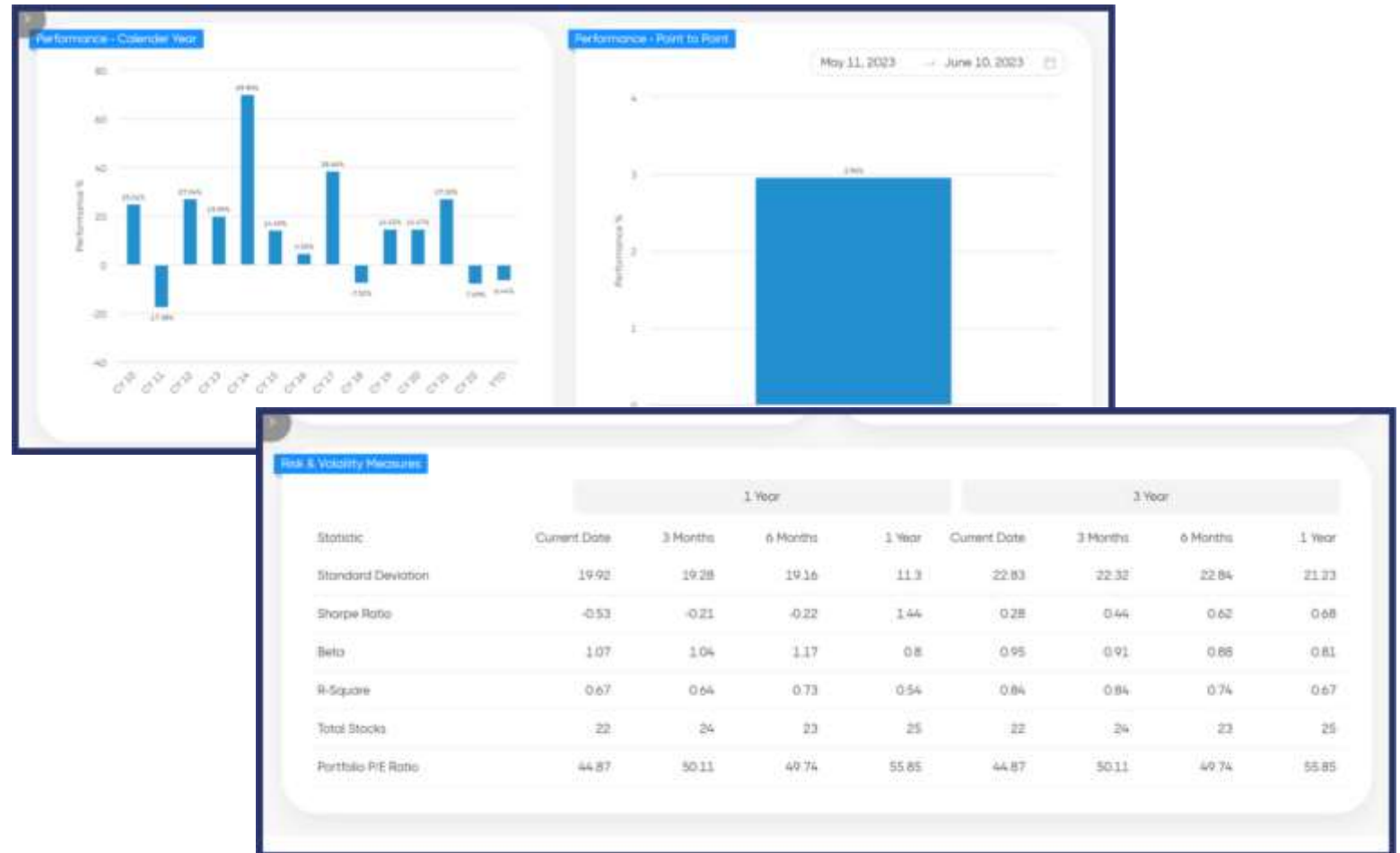


You may view the rolling 5-year returns as well as the performance on a month-to-month and financial-year basis by scrolling down to the performance and risk analysis page.

## STEP 8

### Exploring the performance and risk analysis tab in a scheme

You can view the performance on a year-over-year, point-to-point, and risk and volatility measures basis by scrolling down to the performance and risk analysis page.





## STEP 9

### Exploring the detailed portfolio tab in a scheme



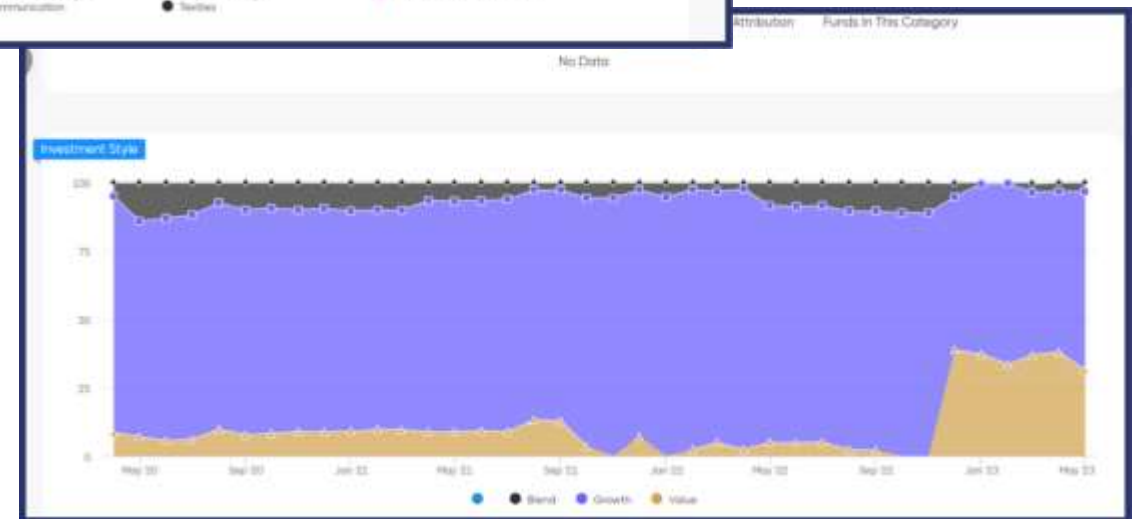
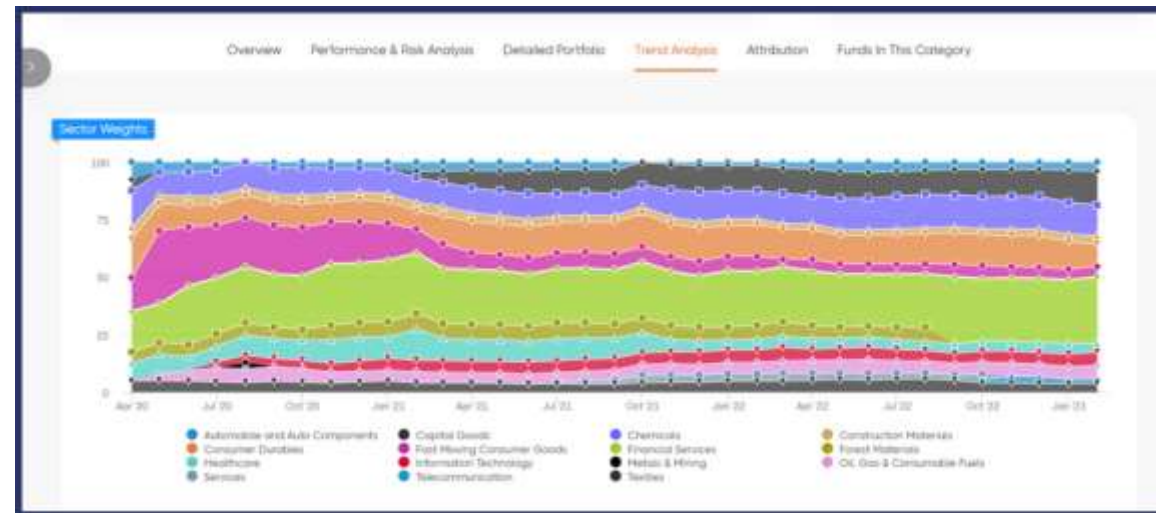
Overview Performance & Risk Analysis <b>Detailed Portfolio</b> Trend Analysis Attribution Funds In This Category							
21 Portfolio Found							
Search Sector	Search Market Cap	Search Instrument Type	Search Investment Style	Apply	Reset		
Security Name	Wts (%)	Sector	Market Cap	Instrument Type	Risk Rating	Investment Style	Held Since
BAJAJ FINANCE LTD	6.92%	Financial Services	Large Cap	Equity	N/A	Growth	30 Apr 2020
APL APOLLO TUBES LTD	6.56%	Capital Goods	Mid Cap	Equity	N/A	Growth	28 Feb 2021
ICICI BANK LTD	6.34%	Financial Services	Large Cap	Equity	N/A	Value	31 May 2020
POLYCAB INDIA LTD	6.29%	Capital Goods	Mid Cap	Equity	N/A	Growth	30 Apr 2021
P I INDUSTRIES LTD	5.48%	Chemicals	Mid Cap	Equity	N/A	Growth	30 Apr 2020
BAJAJ FINSERV LTD	5.32%	Financial Services	Large Cap	Equity	N/A	Value	30 Apr 2020
NAVIN FLUORINE INTERNATIONAL LTD	5.21%	Chemicals	Mid Cap	Equity	N/A	Value	30 Nov 2021
RELIANCE INDUSTRIES LTD	5.15%	Oil, Gas & Consumable Fuels	Large Cap	Equity	N/A	Growth	31 May 2020

The amount of equities that the company has added to or invested in for this specific plan is listed on the detailed portfolio tab.

## STEP 10

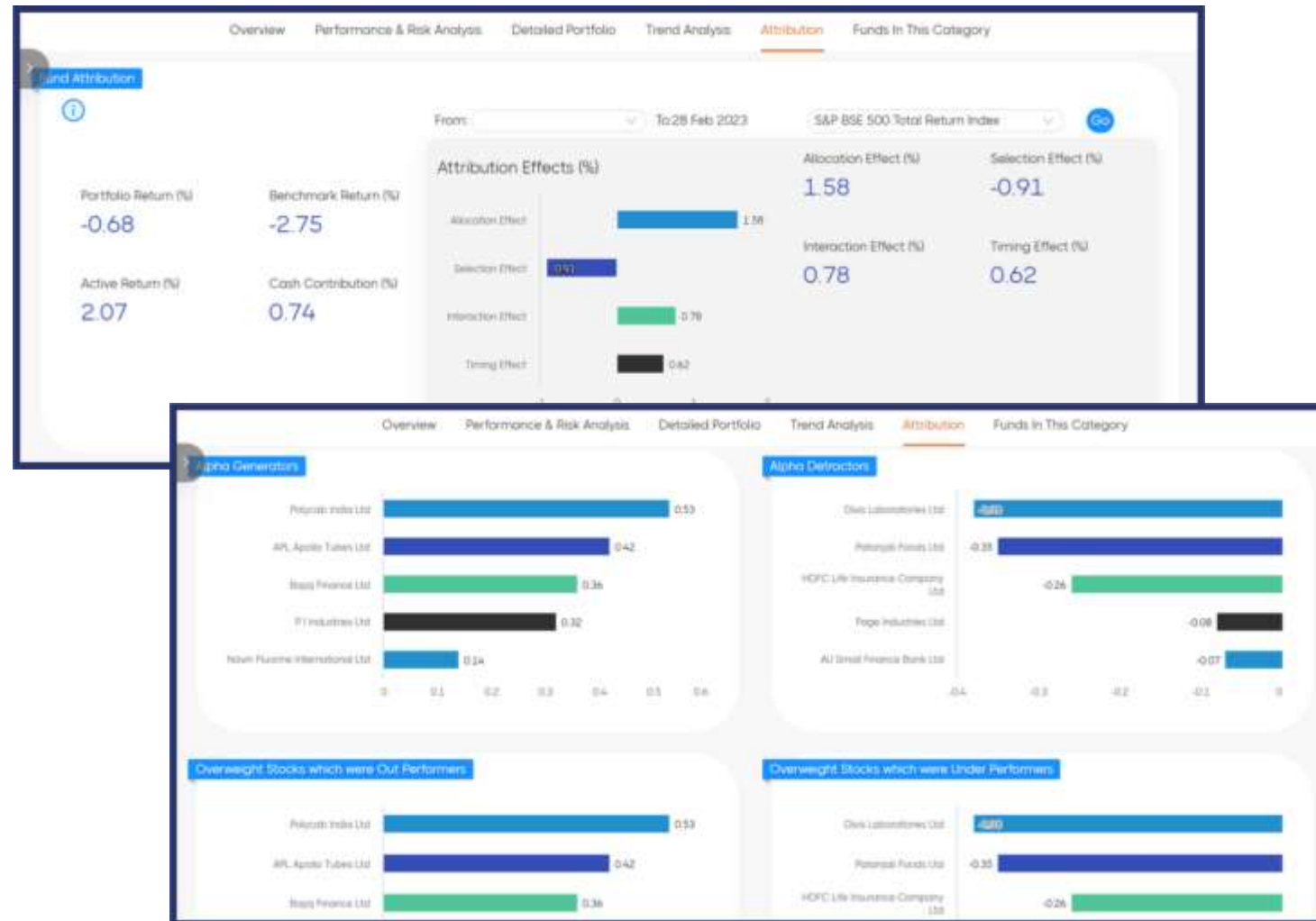
### Exploring the trend analysis tab in a scheme

The focus now shifts to the trend analysis section, where a chart based on a trend analysis allows us to see the sector weights and investment approach.



## STEP 10

### Exploring the attribution tab in a scheme



Moving on, we can see the fund attribution, alpha generators, alpha detractors, overweight stocks that underperform, and overweight stocks that under perform in the attribution section.

## STEP 10











### Exploring the attribution tab in a scheme

Moving on, the attribution section shows the BM Stocks not invested that under perform, BM Stocks not invested that outperform, and a heat map of the stocks.



## STEP 11

### Exploring the funds in this category in a scheme

Overview Performance & Risk Analysis Detailed Portfolio Trend Analysis Attribution Funds In This Category										
AMC	Fund Name	Product	Fund AUM (Cr)	Returns 1M	Returns 3M	Returns 6M	Returns 1Y	Returns 3Y	Returns 5Y	
<input checked="" type="checkbox"/>	 ASK - ISP	 Multi Cap	₹1,531.31	▲5.36%	▲10.3%	▼-1.08%	▲7.22%	18.94%	▲8.27%	
<input type="checkbox"/>	 Basant Maheshwari - Equity Fund	 Multi Cap	₹226.03	▲2.66%	▲9.53%	▼-9.51%	▼-10.07%	21.66%	▲7.55%	
<input type="checkbox"/>	 Piper Serico Advisors - Leader Portfolio	 Multi Cap	₹479.60	▲2.4%	▲7.1%	▼-2%	▼-8.1%	▲15.8%	Not Available	
<input type="checkbox"/>	 PRP - Indian Exports Momentum Portfolio	 Multi Cap	₹0.64	▼-4.22%	▼-0.57%	▲9.38%	▼-8.04%	Not Available	Not Available	
<input type="checkbox"/>	 Narnolia - MultiCap Strategy	 Multi Cap	₹340.51	▼-1.68%	▼-5.66%	▼-3.37%	▼-7.26%	20.34%	13.78%	

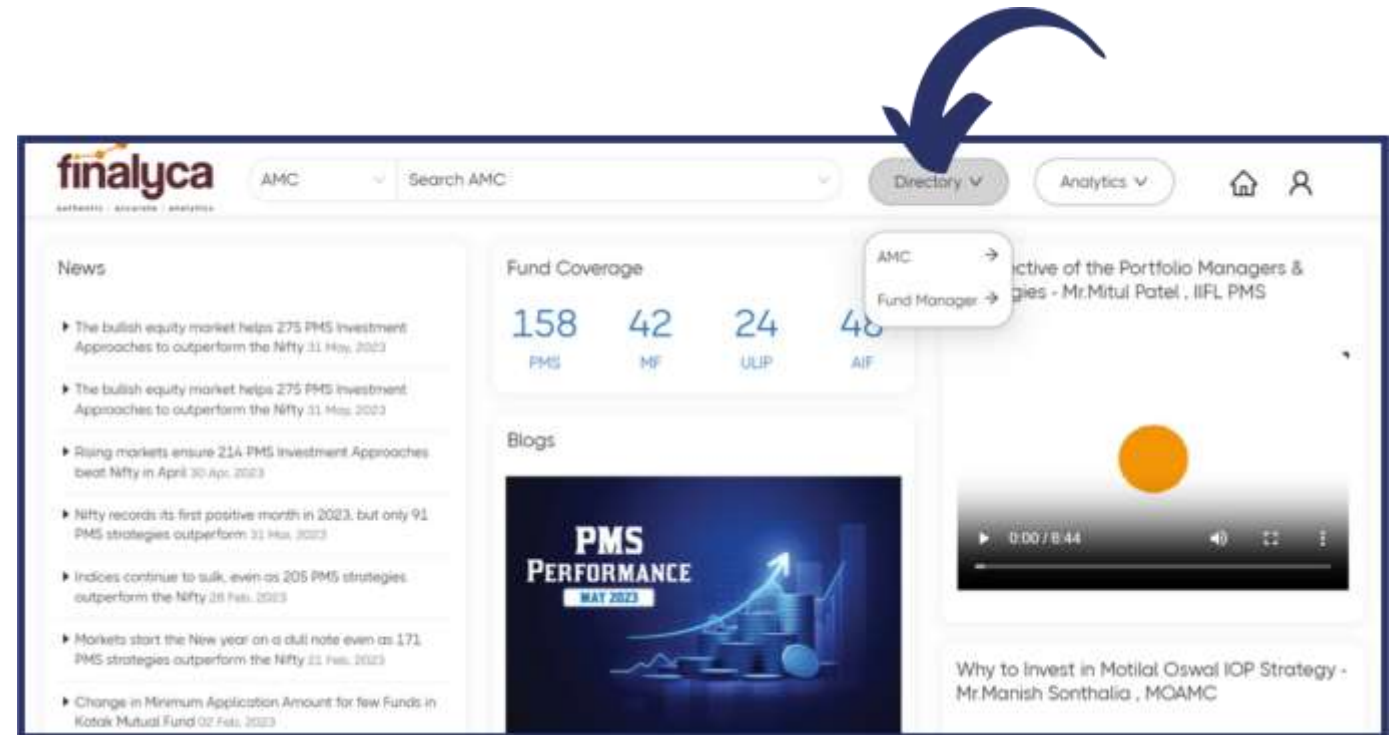
## STEP 12

### Exploring the directory feature on the dashboard



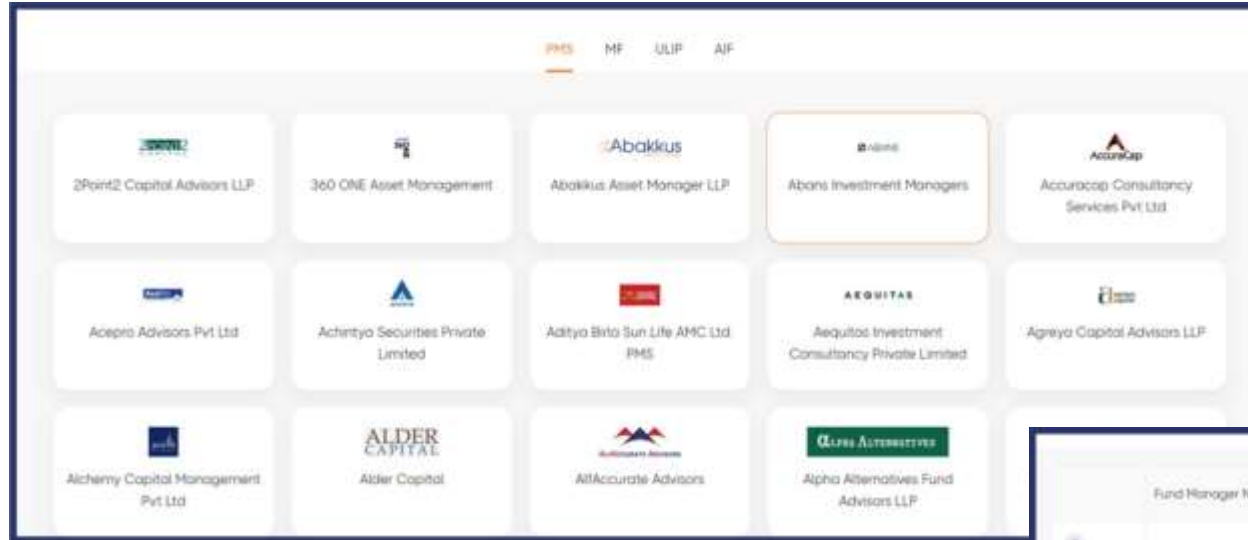
Under the dashboard, we can observe that there are two features for AMC\* and Fund Managers.

You can see a list of all active AMCs under "AMC," and you can get information about each AMC's fund manager under "Fund Manager."



## STEP 12

### Exploring the directory feature on the dashboard



List of AMC's

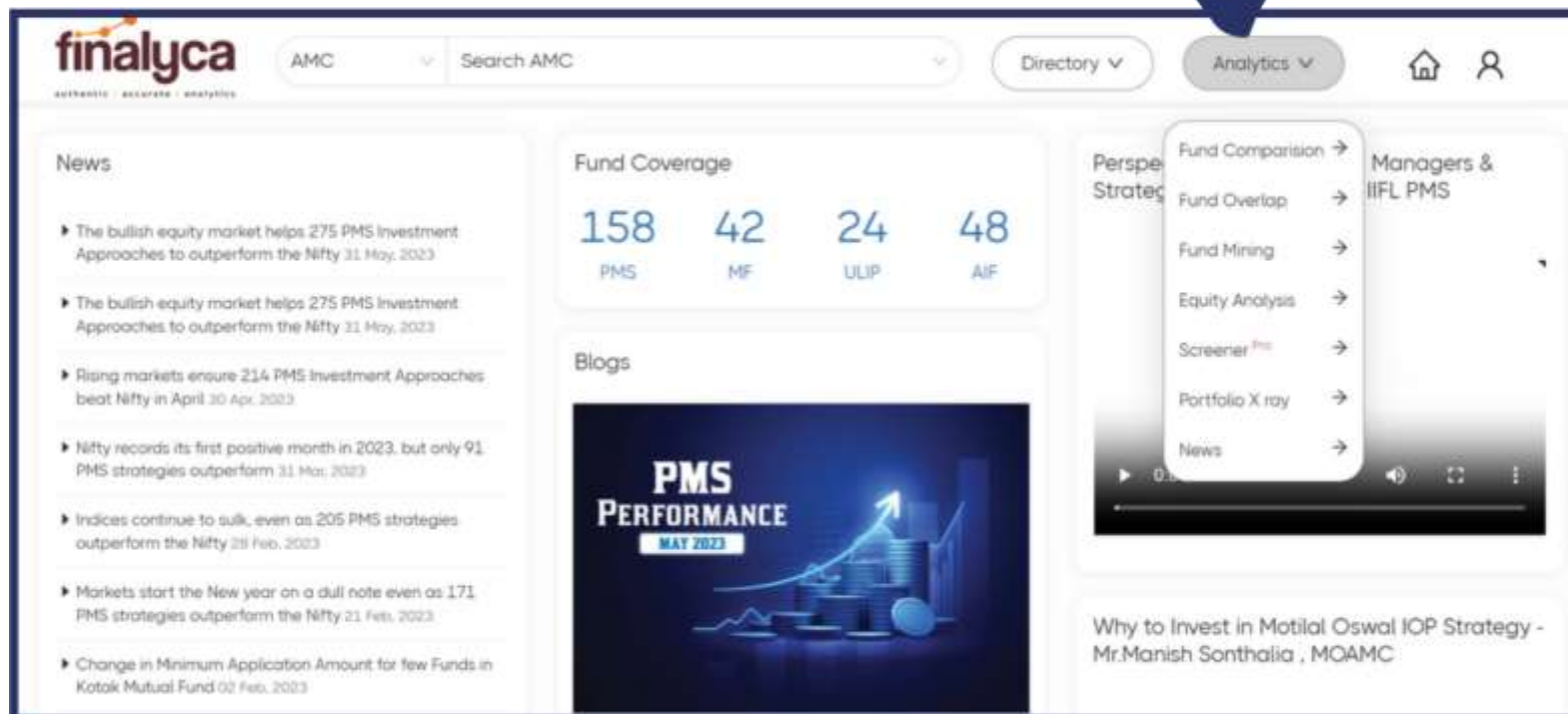
List of Fund Manager's

	Fund Manager Name	AMC	Product	AUM Managed (Cr)	No of Funds Managed
	Credent Asset Management		PMS	1.71	1
	Arun Subramanyam	AMBERSAND-CAPITAL TRUST	AP	329	1
	"Mr Sarvesh Gupta "	Maximal Capital	PMS	61.31	2
	"Sarvesh Gupta "	Maximal Capital	PMS	61.31	2
	Aakash Manghani	BOI AXA Mutual Fund	Multi Fund	1249.76	2
	Aashish Agarwal - CFA	Crescent Investment Management Pvt Ltd	PMS	11.11	2
	Aayush Ganerwala	DSP Mutual Fund	Multi Fund	2029.18	2
	Aditya Agarwal	Piper Sierce Advisors Pvt Ltd	PMS	479.6	1
	Abhay Lajwalia	Aventus Capital Markets	AP	1267	2
	Abhay Lajwalia	Aventus Capital Markets	AP	1267	2



## STEP 13

### Exploring the Analytics feature on the dashboard




Now let's move on to the Analytics feature, where we offer a variety of functions like Fund Comparisons, Fund Overlaps, Fund Mining, Equity Analysis, Screener (available on the pro edition), Portfolio X-Ray, and News.



## STEP 13

### Exploring the Fund Comparison of the Analytics the dashboard

When we check at the portal's fund comparison feature, we can see that we may compare up to three funds—any three—and they don't just have to be mutual funds or PMSs.

Funds To Compare			
AMC			
Product Name	MF	PMS	ULIP
Fund Name	HDFC Large and Mid Cap Fund (IDCW)	ASK - ISP	Reliance Life Super Growth Fund 2
As On Date	28 Feb 2023	28 Feb 2021	06 Feb 2023
NAV	25.67	52.81	₹1.00
Net Assets (cr.)	₹7,911.00	₹3,918.00	11 Jan 2010
Inception Date	19 Jan 2009	04 Jan 2010	Not Applicable
Risk Meter		Not Applicable	Not Applicable

## STEP 13

### Exploring the Fund Comparison of the Analytics on the dashboard



Portfolio Characteristics					
Total Stocks	156	22		44	
Avg Mkt Cap (Rs.Cr)	N/A	₹2,36,515.47		₹4,22,926.95	
Portfolio P/E Ratio	43.05	58.26		22.4	
Risk Analysis		1 Yr	3 Yr	1 Yr	3 Yr
Standard Deviation	1.08	1.41	33.1	23.32	
Sharpe Ratio	0.01	0.05	0.4	0.31	
Beta	0.92	0.9	1.01	0.63	
R-Square	0.84	0.86	0.16	0.18	
Alpha	0.01	0.02	-53.49	-7.78	
Modified Duration	N/A	N/A	N/A	N/A	N/A

Here, we can see that there is a comparison between the specific MF, PMS, and ULIP schemes based on the standard deviations, sharpe ratio, beta, r-squared, alpha, and modified duration of the schemes, which enables us to choose which scheme is the best for the individual to select.

## STEP 13

### Exploring the Fund Comparison of the Analytics on the dashboard

Top Holdings %	Security Name	Wts(%)	Security Name	Wts(%)	Security Name	Wts(%)
	HDFC BANK LTD	4.79 %	BAJAJ FINANCE LTD	7.14 %	RELIANCE INDUSTRIES LTD	7.38 %
	ICICI BANK LTD	3.83 %	ICICI BANK LTD	6.36 %	HDFC BANK LTD	6.67 %
	STATE BANK OF INDIA	2.69 %	POLYCAB INDIA LTD	6.34 %	ICICI BANK LTD	5.91 %
	INFOSYS LTD	2.58 %	P I INDUSTRIES LTD	5.87 %	GOI GOI SEC 6.79 15/05/2027	5.65 %
	RELIANCE INDUSTRIES LTD	2.48 %	APL APOLLO TUBES LTD	5.67 %	INFOSYS LTD	5.46 %
	ITC LTD	1.89 %	AU SMALL FINANCE BANK LTD	5.61 %	HOUSING DEVELOPMENT FINANCE CORPORATION LTD	4.63 %
	LARSEN & TOUBRO LTD	1.81 %	NAVIN FLUORINE INTERNATIONAL LTD	5.32 %	GOI SEC 7.26 22/08/2032	3.92 %
	TATA CONSULTANCY SERVICES LTD	1.72 %	BAJAJ FINSERV LTD	5.24 %	TATA CONSULTANCY SERVICES LTD	3.42 %
	MAHINDRA & MAHINDRA FINANCIAL SERVICES LTD	1.53 %	TITAN COMPANY LTD	5.18 %	ITC LTD	3.2 %
	MARUTI SUZUKI INDIA LTD	1.54 %	RELIANCE INDUSTRIES LTD	5.06 %	GOI GOI SEC 7.94 23/05/2036	2.85 %

## STEP 13

### Exploring the Fund Comparison of the Analytics on the dashboard







Exit Load			Year : 1%			
Trailing Returns (%)	Fund	Category	Fund	Benchmark	Fund	Category
1-Month	-11%	-0.2%	4.1%	7.8%	1.1%	N/A
3-Month	-5.8%	-5.7%	4.0%	14.0%	-0.2%	N/A
6-Month	-0.8%	-1.8%	20.0%	30.1%	3.0%	N/A
1-Year	8.7%	4.5%	12.3%	32.4%	3.4%	N/A
3-Year	21.5%	17.5%	8.7%	9.7%	13.6%	N/A
5-Year	11.3%	10.5%	14.1%	16.1%	9.8%	N/A
Since Inception	13.1%	N/A	16.1%	9.7%	9.8%	N/A

Here, we can see that the specific MF, PMS, and ULIP schemes are compared based on trailing returns that are offered for durations of one month, three months, six months, one year, three years, five years, and from inception.

## STEP 13

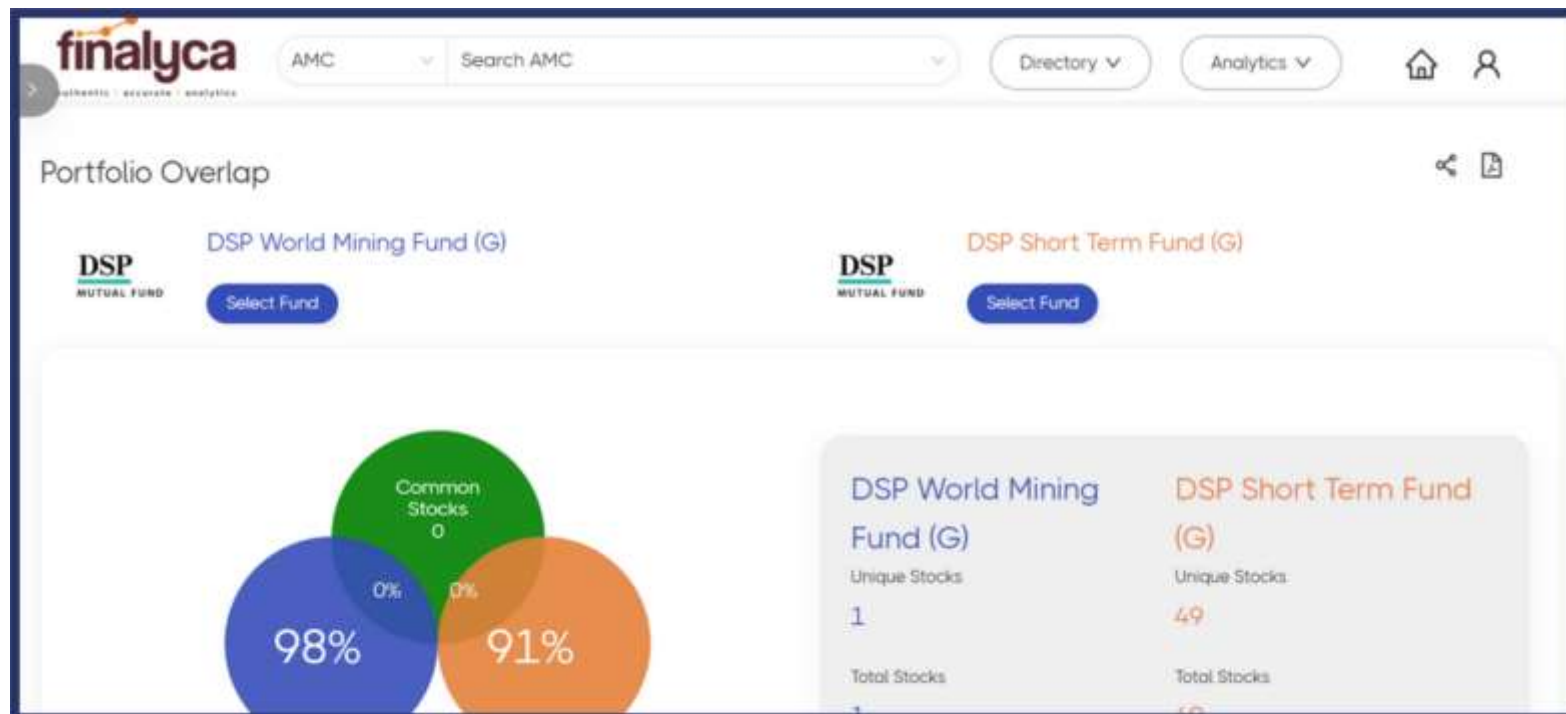
### Exploring the Fund Comparison of the Analytics on the dashboard

The reports and comparisons can be downloaded in pdf format or sent through email.

Funds To Compare			
AMC			
Product Name	MF	PMS	ULIP
Fund Name	HDFC Large and Mid Cap Fund (IDCW)	ASK - ISP	Reliance Life Super Growth Fund 2
As On Date	28 Feb 2023	28 Feb 2021	06 Feb 2023
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Net Assets (cr.)	₹7,911.00	₹3,918.00	11 Jan 2010
Inception Date	19 Jan 2009	04 Jan 2010	Not Applicable
Risk Meter		Not Applicable	Not Applicable

## STEP 13

### Exploring the Fund Comparison of the Analytics on the dashboard





## STEP 15

### Exploring the Equity Analysis of the analysis on the dashboard

Here, we can obtain an overview of equity analysis in terms of the total number of funds, investment philosophy, and stock distribution across various AMCs.

Overview Increase Decrease in Exposure New & Exited Stock by Funds										
Security Name	Market Cap	Investment Style	No of funds	MF	PMS	ULIP	AIF			
ICICI Bank Ltd	Large Cap	Value	1137	551	123	449	14			
HDFC Bank Ltd	Large Cap	Growth	1134	528	96	496	14			
Infosys Ltd	Large Cap	Growth	1110	493	85	519	13			
Reliance Industries Ltd	Large Cap	Growth	1082	467	60	545	10			
Larsen & Toubro Ltd	Large Cap	Growth	1029	436	69	515	9			
Housing Development Finance Corporation Ltd	Large Cap	Growth	933	377	43	507	6			
Axis Bank Ltd	Large Cap	Value	915	447	67	388	13			
State Bank of India	Large Cap	Value	872	470	86	311	5			
ITC Ltd	Large Cap	Growth	868	348	52	461	7			



## STEP 15

### Exploring the Equity Analysis of the analysis on the dashboard



Overview										
Increase Decrease in Exposure										
New & Exited Stock by Funds										
Security Name	Market Cap	Investment Style	No of funds	MF	PMS	ULIP	AIF			
ICICI Bank Ltd	Large Cap	Value	1137	551	123	449	14			
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Reliance Industries Ltd	Large Cap	Growth	1082	467	60	545	10			
Larsen & Toubro Ltd	Large Cap	Growth	1029	436	69	515	9			
Housing Development Finance Corporation Ltd	Large Cap	Growth	933	377	43	507	6			
Axis Bank Ltd	Large Cap	Value	915	447	67	388	13			
State Bank of India	Large Cap	Value	872	470	86	311	5			
ITC Ltd	Large Cap	Growth	868	348	52	461	7			

Here, we can obtain an overview of equity analysis, including the total number of funds, the investment approach, and the allocation of stocks across various AMCs.

## STEP 15

### Exploring the Equity Analysis of the analysis on the dashboard

Here, we may observe the growth and decline of equity stocks across various AMCs.

Overview		Increase Decrease in Exposure						New & Exited Stock by Funds					
Security Name		Increase Exposure						Decrease Exposure					
		MF	PMS	ULIP	AIF	Total Funds		MF	PMS	ULIP	AIF	Total Funds	
ICICI Bank Ltd	<a href="#">View Funds</a>	274	29	283	4	590		255	61	124	0	440	
HDFC Bank Ltd	<a href="#">View Funds</a>	43	8	13	4	68		475	65	453	8	1001	
Infosys Ltd	<a href="#">View Funds</a>	365	32	431	2	830		99	24	46	9	178	
Reliance Industries Ltd	<a href="#">View Funds</a>	133	12	250	3	398		311	34	226	7	578	
Larsen & Toubro Ltd	<a href="#">View Funds</a>	41	5	24	2	72		380	47	460	7	894	
Housing Development Finance Corporation Ltd	<a href="#">View Funds</a>	64	6	74	0	144		293	20	395	3	711	
Axis Bank Ltd	<a href="#">View Funds</a>	349	31	247	6	633		78	19	94	6	197	

## STEP 15

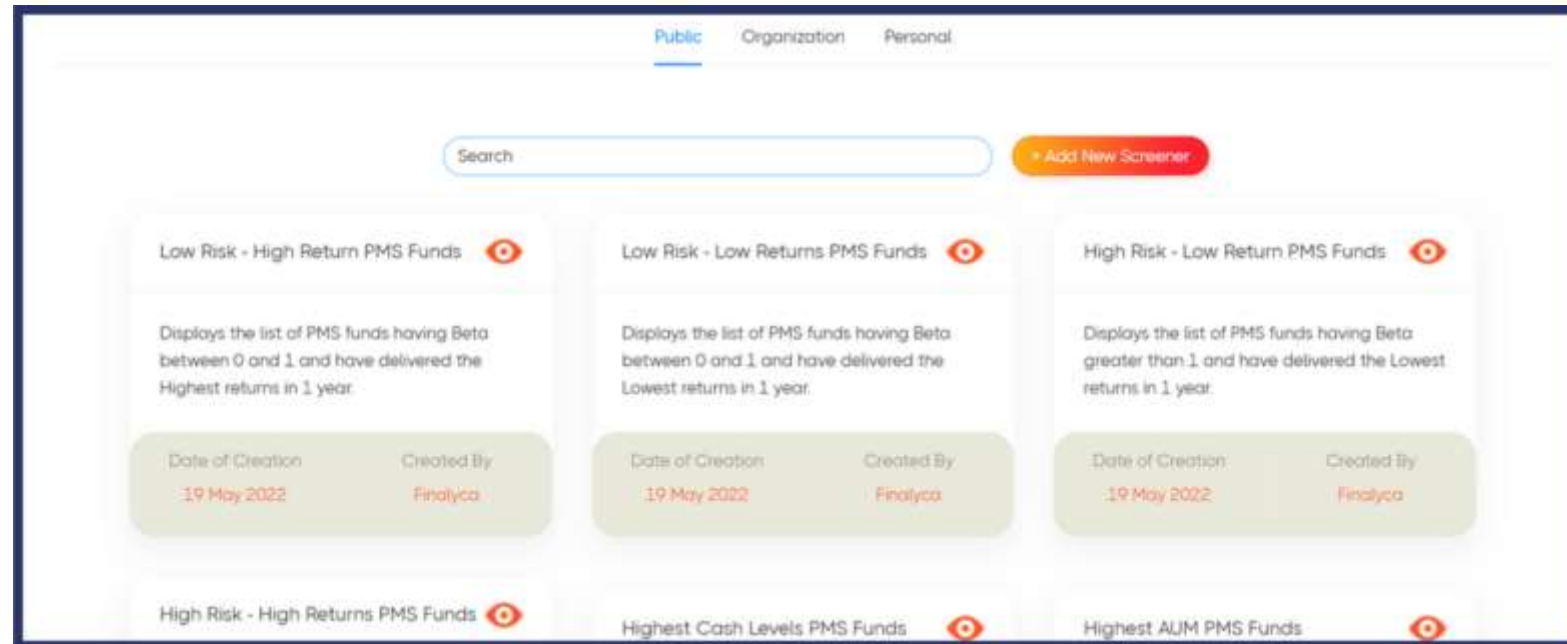
### Exploring the Equity Analysis of the analysis on the dashboard

		Overview	Increase		Decrease in Exposure		New & Exited Stock by Funds							
Security Name		New Funds						Exited Funds						
		MF	PMS	ULIP	AIF	Total Funds	MF	PMS	ULIP	AIF	Total Funds			
ICICI Bank Ltd	<a href="#">View Funds</a>	8	24	20	0	52	1	20	2	0	23			
HDFC Bank Ltd	<a href="#">View Funds</a>	8	19	20	1	48	3	13	9	0	25			
Infosys Ltd	<a href="#">View Funds</a>	19	21	25	1	66	6	12	3	0	21			
Reliance Industries Ltd	<a href="#">View Funds</a>	10	8	20	0	38	5	8	1	0	14			
Larsen & Toubro Ltd	<a href="#">View Funds</a>	15	12	19	0	46	3	9	11	2	25			
Housing Development Finance Corporation Ltd	<a href="#">View Funds</a>	19	11	28	2	60	4	10	15	0	29			
Axis Bank Ltd	<a href="#">View Funds</a>	11	10	28	0	49	16	8	16	1	41			

Here, we may see the most recent entries and departures of equity stocks from various AMCs.

## STEP 16

### Exploring the Screener Pro of the analysis on the dashboard



## STEP 16

### Exploring the Screener Pro of the analysis on the dashboard

The image shows a screenshot of the Finalyca dashboard with a blue arrow pointing from the 'Add New Screener' button to a detailed view of the 'Create screener' interface.

**Dashboard Overview:**

- Search bar
- + Add New Screener** button
- Three pre-defined screener cards:
  - Low Risk - High Return PMS Funds**: Displays the list of PMS funds having Beta between 0 and 1 and have delivered the Highest returns in 1 year. Created by Finalyca on 19 May 2022.
  - Low Risk - Low Returns PMS Funds**: Displays the list of PMS funds having Beta between 0 and 1 and have delivered the Lowest returns in 1 year. Created by Finalyca on 19 May 2022.
  - High Risk - Low Return PMS Funds**: Displays the list of PMS funds having Beta greater than 1 and have delivered the Lowest returns in 1 year.

**Create screener Interface:**

- Header: finalyca, AMC, Search AMC, Directory, Analytics, Home, User icon.
- Section: **Create screener** (Back to Dashboard button)
- Steps: 1. TRY, 2. SAVE
- Instruction: Add the rules in the rule builder below
- Rule Builder Table:

Field	Operator	Value	Action
Product	in	AIF x PMS x ULIP x	X
	*	Mutual Fund x	X
- Buttons: +Rule, +Group, Try

## STEP 16

### Exploring the Screener Pro of the analysis on the dashboard

**finalyca**  
Authentic | Accurate | Analytics

Search AMC

Directory Analytics

News

- As markets surge 246 PMS June 30 Jun, 2023
- The bullish equity market is Approaches to outperform
- The bullish equity market helps 275 PMS investment Approaches to outperform the Nifty 31 Mar, 2023
- Rising markets ensure 214 PMS investment Approaches beat Nifty in April 30 Apr, 2023
- Nifty records its first positive month in 2023, but only 91 PMS strategies outperform 31 Mar, 2023
- Indices continue to sulk, even as 205 PMS strategies outperform the Nifty 28 Feb, 2023
- Markets start the New year on a dull note even as 171 PMS strategies outperform the Nifty 21 Feb, 2023

Fund Coverage

158 43 24 48  
PMS MF ULIP AIF

Blogs

PMS PERFORMANCE  
JUNE 2023

Perspective of the Portfolio Managers & Strategies - Mr.Mitul Patel , IIFL PMS

**finalyca**  
Authentic | Accurate | Analytics

Issuer **HDFC Bank Ltd**

Directory Analytics

HDFC Bank Ltd

No of Funds Invested: 1268

Highest Holding by Portfolio Weights (%): 27.74 %  
AXIS Nifty Bank ETF

Highest Holdings by Investment Value: 13470.65 Cr  
SBI Nifty 50 ETF

Search AMC Search Product Search Classification Apply Reset

Funds Holding the Sector

<input type="checkbox"/>	AMC	Fund Name	Product	Classification	In This Fund	Amount Invested (Cr)	Held Since
<input type="checkbox"/>	Axis	Axis Nifty Bank ETF	Mutual Fund	Other: ETFs	27.74 %	45.65	30 Sep 2022
<input type="checkbox"/>	Edelweiss	Edelweiss ETF - Nifty Bank	Mutual Fund	Other: ETFs	27.7 %	0.47	30 Sep 2022
<input type="checkbox"/>	HDFC	HDFC Nifty Bank ETF	Mutual Fund	Other: ETFs	27.63 %	631.52	31 Aug 2020

You can search for an issuer here to examine the amount of money invested, the highest holdings by investment value and by portfolio weight percentage.

## STEP 16

### Exploring the Screener Pro of the analysis on the dashboard



The screenshot displays the finalyca dashboard with the 'Screener Pro' section active. The 'Issuer' dropdown is set to 'HDFC Bank Ltd'. The dashboard shows the following summary data:

Issuer	No of Funds Invested	Highest Holding by Portfolio Weights (%)	Highest Holdings by Investment Value
HDFC Bank Ltd	97	21.21 %	654.43 Cr

Below the summary, there are filters for 'Search AMC', 'PMS' (selected), and 'Search Classification'. The 'Apply' button is highlighted in orange. The table below lists the funds holding the sector:

AMC	Fund Name	Product	Classification	In This Fund	Amount Invested (Cr)	Held Since
Trivantage Capital	Trivantage Capital - Focussed Corp Lenders (Plan B)	PMS	Thematic	21.21 %	5.61	31 Oct 2022
Marcellus	Marcellus - Kings of Capital	PMS	Multi Cap	14.89 %	84.22	30 Nov 2020

We can also check only for PMS's and not for all AMC to understand what no of PMS's have HDFC in their scheme, highest holdings in a particular PMS Scheme and holding by investment value.

## STEP 16

### Exploring the Screener Pro of the analysis on the dashboard

Here we can check that which sector has the no of funds invested in it and also the highest holding in portfolio weightage along with the highest holding by investment value.

The screenshot shows the finalyca dashboard with the 'Screener Pro' section active. A blue arrow points to the 'Sector' dropdown menu in the top navigation bar. The main content area displays 'Fund Coverage' statistics, a 'PMS PERFORMANCE' chart, and a video player. Below this, the 'Screener Pro' section is visible, showing search filters for 'Sector' (set to Chemicals) and 'Product' (set to PMS). The results table lists funds holding the sector, including Green Portfolio - MNC Advantage, Aditya Birla SL CEF - Global Agri Plan IGI, and Marcellus - Little Champs.

AMC	Fund Name	Product	Classification	In This Fund	Amount Invested (Cr)	Held Since
	Green Portfolio - MNC Advantage	PMS	Thematic	32.13 %	4.41	30 Apr 2021
	Aditya Birla SL CEF - Global Agri Plan IGI	Mutual Fund	Equity: Sectoral : Thematic	28.19 %	3.66	30 Sep 2022
	Marcellus - Little Champs	PMS	Small Cap	27.5 %	229.25	31 Jul 2020





Schedule an appointment

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