



Indian Stock Market Portfolio Analysis Report

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Alphalens - A product of Edhaz Financial Services Private Limited
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■ Executive Summary

| Metric | Value |
|-------------------------|----------------|
| Total Investment | ■19,441,523.00 |
| Current Portfolio Value | ■20,162,606.71 |
| Total Gain/Loss | ■+721,083.71 |
| Portfolio Return | +3.71% |
| Number of Stocks | 57 |
| Profitable Stocks | 47 (82.5%) |
| Loss-making Stocks | 9 (15.8%) |

■ Dividend Yield Metrics

| Metric | Value | Description |
|--------------------------|-------------|-----------------------------------|
| Portfolio Dividend Yield | 108.33% | Weighted average dividend yield |
| Expected Annual Dividend | ■21,843,153 | Projected yearly dividend income |
| Dividend-Paying Stocks | 46 | Stocks currently paying dividends |
| Non-Dividend Stocks | 11 | Stocks not paying dividends |
| Highest Yield Stock | GAIL | Yield: 768.00% |

■ Tax Implications (If Portfolio Sold Today)

| Tax Category | Amount | Rate/Notes |
|---------------------------------|----------|------------------------------|
| Short-Term Capital Gains (STCG) | ■927,395 | Holdings < 1 year |
| Long-Term Capital Gains (LTCG) | ■0 | Holdings ≥ 1 year |
| Estimated STCG Tax | ■185,479 | 20% flat rate |
| Estimated LTCG Tax | ■0 | 12.5% above ■1.25L exemption |
| Total Estimated Tax | ■185,479 | Combined tax liability |

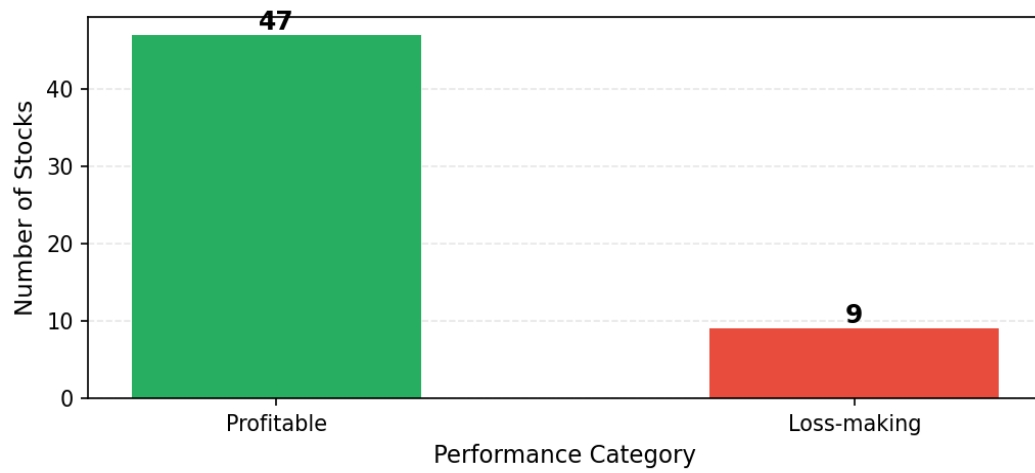
Transaction Costs & Charges

| Charge Type | Amount | Rate |
|----------------------------------|---------|----------------------|
| Securities Transaction Tax (STT) | ■20,163 | 0.1% on sell value |
| Stamp Duty | ■2,916 | 0.015% on buy value |
| Exchange Transaction Charges | ■1,366 | 0.00345% |
| SEBI Turnover Fee | ■40 | 0.0001% |
| Total Transaction Costs | ■24,485 | All charges combined |

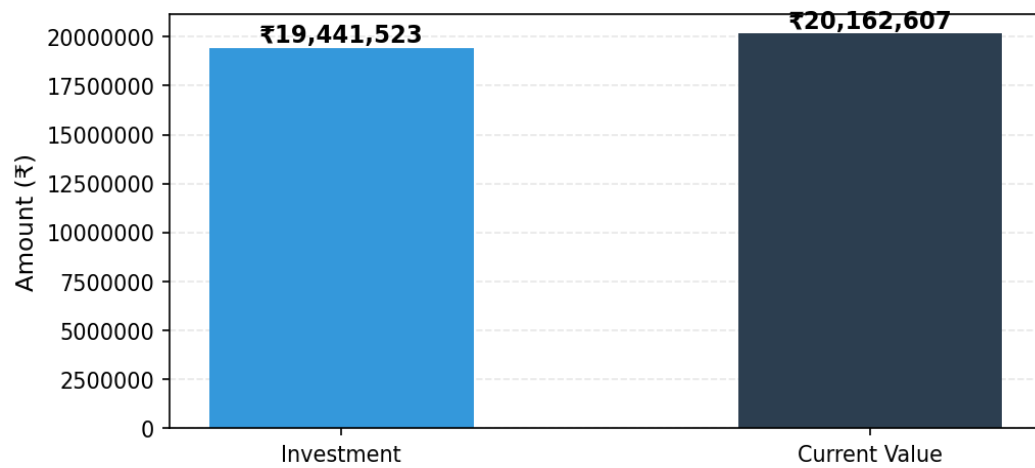
Note: Tax calculations are estimates based on Union Budget 2024 rates. LTCG exemption of ■1.25 lakh applies annually. Consult a qualified tax advisor for personalized advice.

■ Performance Overview

Stock Performance Distribution



Investment vs Current Portfolio Value



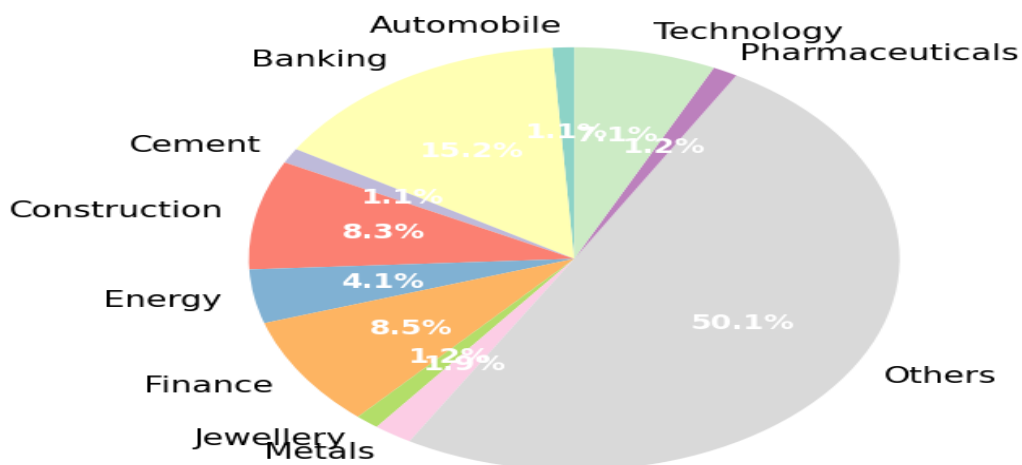
■ Detailed Portfolio Holdings

| Stock | Sector | Qty | Buy Price | Current | Investment | Current Value | Gain/Loss | Return % |
|------------|-----------------|-------|-----------|---------|------------|---------------|-----------|----------|
| BAJFINANCE | Finance | 1780 | ■916 | ■963 | ■1,630,480 | ■1,714,674 | ■+84,194 | +5.16% |
| ZEEL | Others | 800 | ■79 | ■85 | ■63,200 | ■67,848 | ■+4,648 | +7.35% |
| YESBANK | Others | 6360 | ■20 | ■22 | ■127,200 | ■137,058 | ■+9,858 | +7.75% |
| WIPRO | Technology | 1600 | ■233 | ■233 | ■372,800 | ■373,344 | ■+544 | +0.15% |
| IDEA | Others | 10000 | ■10 | ■11 | ■98,400 | ■113,500 | ■+15,100 | +15.35% |
| VMM | Others | 190 | ■125 | ■121 | ■23,750 | ■22,931 | ■-819 | -3.45% |
| V2RETAIL | Others | 5 | ■1,799 | ■2,078 | ■8,995 | ■10,392 | ■+1,397 | +15.53% |
| ULTRACEMCO | Cement | 18 | ■12,680 | ■12,806 | ■228,240 | ■230,508 | ■+2,268 | +0.99% |
| TRENT | Others | 50 | ■3,771 | ■4,013 | ■188,550 | ■200,630 | ■+12,080 | +6.41% |
| TITAN | Jewellery | 58 | ■4,007 | ■4,144 | ■232,406 | ■240,352 | ■+7,946 | +3.42% |
| TCS | Technology | 65 | ■3,147 | ■2,999 | ■204,555 | ■194,942 | ■-9,613 | -4.70% |
| TATASTEEL | Metals | 2000 | ■191 | ■195 | ■382,000 | ■390,800 | ■+8,800 | +2.30% |
| TATACONSUM | Others | 700 | ■1,169 | ■1,153 | ■818,300 | ■807,100 | ■-11,200 | -1.37% |
| TCS | Technology | 214 | ■3,146 | ■2,999 | ■673,244 | ■641,807 | ■-31,437 | -4.67% |
| SUZLON | Others | 2809 | ■45 | ■50 | ■126,405 | ■139,804 | ■+13,399 | +10.60% |
| SUNPHARMA | Pharmaceuticals | 148 | ■1,630 | ■1,693 | ■241,240 | ■250,623 | ■+9,383 | +3.89% |
| SUMICHEM | Others | 200 | ■415 | ■429 | ■83,000 | ■85,760 | ■+2,760 | +3.33% |
| SAIL | Others | 2500 | ■152 | ■157 | ■380,000 | ■393,225 | ■+13,225 | +3.48% |
| SRF | Others | 59 | ■2,687 | ■2,921 | ■158,533 | ■172,315 | ■+13,782 | +8.69% |
| SOBHA | Others | 268 | ■1,363 | ■1,500 | ■365,284 | ■401,893 | ■+36,609 | +10.02% |
| SBIN | Banking | 273 | ■1,040 | ■1,068 | ■283,920 | ■291,619 | ■+7,699 | +2.71% |
| SBICARD | Others | 19 | ■772 | ■750 | ■14,668 | ■14,244 | ■-424 | -2.89% |
| SAMMAANCAP | Others | 3200 | ■138 | ■150 | ■441,600 | ■480,736 | ■+39,136 | +8.86% |
| RELIANCE | Energy | 400 | ■1,388 | ■1,457 | ■555,200 | ■582,720 | ■+27,520 | +4.96% |
| RELIANCE | Energy | 170 | ■1,390 | ■1,457 | ■236,300 | ■247,656 | ■+11,356 | +4.81% |
| PFS | Others | 1000 | ■170 | ■34 | ■170,000 | ■34,470 | ■-135,530 | -79.72% |
| PFC | Others | 391 | ■362 | ■415 | ■141,542 | ■162,109 | ■+20,567 | +14.53% |

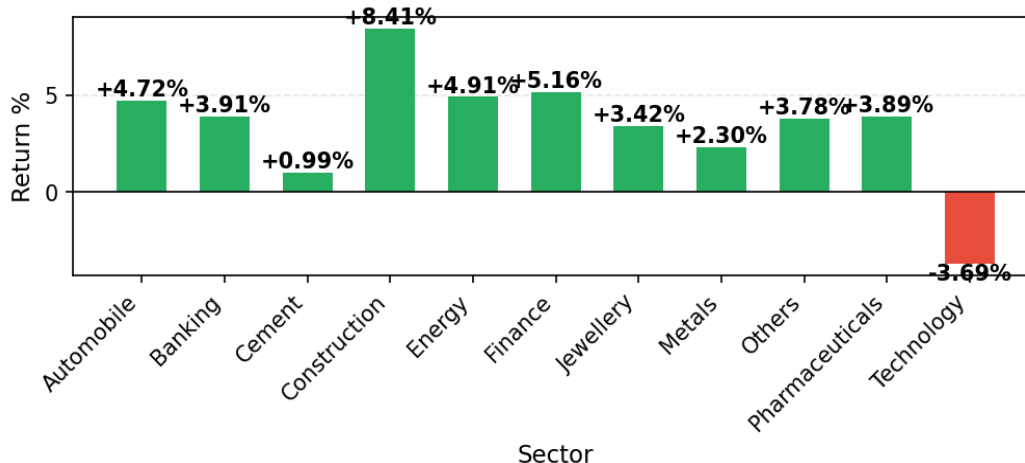
| | | | | | | | | |
|--------------|--------------|-------|--------|--------|------------|------------|-----------|---------|
| ORIENTCEM | Others | 100 | ■164 | ■165 | ■16,400 | ■16,502 | ■+102 | +0.62% |
| NUVAMA | Others | 120 | ■1,280 | ■1,392 | ■153,600 | ■167,028 | ■+13,428 | +8.74% |
| NHPC | Others | 3000 | ■74 | ■78 | ■222,000 | ■235,440 | ■+13,440 | +6.05% |
| NATCOPHARM | Others | 100 | ■814 | ■841 | ■81,400 | ■84,110 | ■+2,710 | +3.33% |
| INF769K01JP9 | Others | 10000 | ■154 | ■154 | ■1,540,000 | ■1,540,000 | ■+0 | +0.00% |
| MAXHEALTH | Others | 150 | ■975 | ■1,025 | ■146,250 | ■153,817 | ■+7,567 | +5.17% |
| M&M | Automobile | 61 | ■3,413 | ■3,574 | ■208,193 | ■218,014 | ■+9,821 | +4.72% |
| LICI | Others | 77 | ■807 | ■835 | ■62,139 | ■64,318 | ■+2,179 | +3.51% |
| LGEINDIA | Others | 46 | ■1,396 | ■1,526 | ■64,216 | ■70,205 | ■+5,989 | +9.33% |
| LT | Construction | 411 | ■3,770 | ■4,087 | ■1,549,470 | ■1,679,798 | ■+130,328 | +8.41% |
| LALPATHLAB | Others | 114 | ■1,395 | ■1,403 | ■159,030 | ■159,976 | ■+946 | +0.59% |
| JSWENERGY | Others | 550 | ■436 | ■469 | ■239,800 | ■257,868 | ■+18,068 | +7.53% |
| JIOFIN | Others | 627 | ■253 | ■268 | ■158,631 | ■168,036 | ■+9,405 | +5.93% |
| JINDALSAW | Others | 1400 | ■178 | ■188 | ■249,200 | ■263,494 | ■+14,294 | +5.74% |
| IRCON | Others | 300 | ■153 | ■157 | ■45,900 | ■47,226 | ■+1,326 | +2.89% |
| INOXINDIA | Others | 22 | ■1,086 | ■1,130 | ■23,892 | ■24,864 | ■+972 | +4.07% |
| INFY | Technology | 33 | ■1,680 | ■1,536 | ■55,440 | ■50,681 | ■-4,759 | -8.58% |
| ICICIGI | Others | 100 | ■1,795 | ■1,854 | ■179,500 | ■185,400 | ■+5,900 | +3.29% |
| ICICIBANK | Banking | 825 | ■1,350 | ■1,408 | ■1,113,750 | ■1,161,930 | ■+48,180 | +4.33% |
| HINDOILEXP | Others | 700 | ■147 | ■156 | ■102,900 | ■109,060 | ■+6,160 | +5.99% |
| HDFCLIFE | Others | 175 | ■716 | ■722 | ■125,300 | ■126,438 | ■+1,138 | +0.91% |
| HDFCBANK | Banking | 1700 | ■918 | ■953 | ■1,560,600 | ■1,620,270 | ■+59,670 | +3.82% |
| HCLTECH | Technology | 100 | ■1,715 | ■1,622 | ■171,500 | ■162,180 | ■-9,320 | -5.43% |
| GAIL | Others | 2000 | ■159 | ■160 | ■318,000 | ■320,820 | ■+2,820 | +0.89% |
| ETERNAL | Others | 2500 | ■252 | ■294 | ■630,000 | ■735,375 | ■+105,375 | +16.73% |
| DLF | Others | 1200 | ■599 | ■660 | ■718,800 | ■791,820 | ■+73,020 | +10.16% |
| COALINDIA | Others | 300 | ■424 | ■435 | ■127,200 | ■130,470 | ■+3,270 | +2.57% |
| BHEL | Others | 1000 | ■244 | ■273 | ■244,000 | ■272,700 | ■+28,700 | +11.76% |
| BANKINDIA | Others | 3000 | ■162 | ■161 | ■486,000 | ■482,790 | ■-3,210 | -0.66% |
| DMART | Others | 120 | ■3,655 | ■3,824 | ■438,600 | ■458,916 | ■+20,316 | +4.63% |

Sector Analysis

Sector Allocation by Value



Sector-wise Returns (%)



Sector Insights

| Insight | Details |
|-------------------------|-----------------------------|
| Best Performing Sector | Construction (+8.41%) |
| Worst Performing Sector | Technology (-3.69%) |
| Most Allocated Sector | Others (■10,110,688, 50.1%) |
| Total Sectors | 11 sectors |

Diversification Analysis

| Metric | Value | Assessment |
|--------------------------|-------|------------|
| Number of Sectors | 11 | Excellent |
| Max Sector Concentration | 50.1% | High Risk |

■ Sector Recommendations

- Consider reducing exposure to Others (currently 50.1%)

■ Detailed Sector Breakdown

| Sector | Stocks | Investment | Current Value | Gain/Loss | Return % | % of Portfolio |
|-----------------|--------|------------|---------------|-----------|----------|----------------|
| Automobile | 1 | ■208,193 | ■218,014 | ■+9,821 | +4.72% | 1.1% |
| Banking | 3 | ■2,958,270 | ■3,073,819 | ■+115,549 | +3.91% | 15.2% |
| Cement | 1 | ■228,240 | ■230,508 | ■+2,268 | +0.99% | 1.1% |
| Construction | 1 | ■1,549,470 | ■1,679,798 | ■+130,328 | +8.41% | 8.3% |
| Energy | 2 | ■791,500 | ■830,376 | ■+38,876 | +4.91% | 4.1% |
| Finance | 1 | ■1,630,480 | ■1,714,674 | ■+84,194 | +5.16% | 8.5% |
| Jewellery | 1 | ■232,406 | ■240,352 | ■+7,946 | +3.42% | 1.2% |
| Metals | 1 | ■382,000 | ■390,800 | ■+8,800 | +2.30% | 1.9% |
| Others | 40 | ■9,742,185 | ■10,110,688 | ■+368,503 | +3.78% | 50.1% |
| Pharmaceuticals | 1 | ■241,240 | ■250,623 | ■+9,383 | +3.89% | 1.2% |
| Technology | 5 | ■1,477,539 | ■1,422,954 | ■-54,585 | -3.69% | 7.1% |

■ Category Analysis (Large/Mid/Small Cap)

| Category | Stocks | Investment | Current Value | Return % | % of Portfolio |
|-----------|--------|------------|---------------|----------|----------------|
| Large Cap | 17 | ■9,699,338 | ■10,051,918 | +3.64% | 49.9% |
| Mid Cap | 40 | ■9,742,185 | ■10,110,688 | +3.78% | 50.1% |

■ Benchmark Comparison

■ Portfolio vs Market Indices

| Index | Return | vs Portfolio |
|------------------|--------|--------------|
| Portfolio | +3.71% | - |
| NIFTY50 | -0.64% | +4.35% |
| NIFTY_MIDCAP_100 | +0.15% | +3.55% |

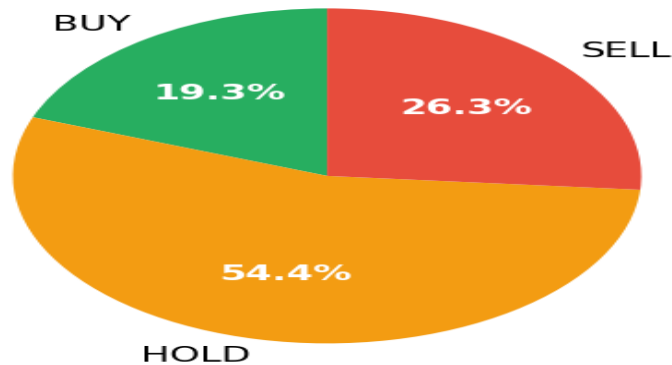
■ Benchmark Insights

- Your portfolio is outperforming NIFTY 50 by +4.35%
- Your portfolio is generating positive returns

■ Investment Recommendations

■ Recommendation Distribution

Recommendation Distribution



| Action | Count | Description |
|--------|-------|---------------------------------------|
| BUY | 11 | Stocks recommended for accumulation |
| HOLD | 31 | Stocks to maintain current position |
| SELL | 15 | Stocks recommended for exit/reduction |

■ Value Investing Perspective

| Stock | Action | Key Rationale |
|------------|--------|---|
| BAJFINANCE | HOLD | Provides steady income through dividends |
| ZEEL | BUY | Potentially undervalued based on earnings |
| YESBANK | HOLD | Trading below book value - good value |
| WIPRO | HOLD | Provides steady income through dividends |
| IDEA | BUY | Potentially undervalued based on earnings |
| VMM | SELL | May be overvalued based on earnings |
| V2RETAIL | SELL | High debt levels may be risky |
| ULTRACEMCO | SELL | May be overvalued based on earnings |
| TRENT | SELL | May be overvalued based on earnings |
| TITAN | SELL | May be overvalued based on earnings |
| TCS | HOLD | Provides steady income through dividends |

| | | |
|--------------|------|---|
| TATASTEEL | HOLD | Potentially undervalued based on earnings |
| TATACONSUM | SELL | May be overvalued based on earnings |
| TCS | HOLD | Provides steady income through dividends |
| SUZLON | SELL | High debt levels may be risky |
| SUNPHARMA | SELL | May be overvalued based on earnings |
| SUMICHEM | HOLD | May be overvalued based on earnings |
| SAIL | BUY | Potentially undervalued based on earnings |
| SRF | SELL | May be overvalued based on earnings |
| SOBHA | SELL | May be overvalued based on earnings |
| SBIN | BUY | Potentially undervalued based on earnings |
| SBICARD | HOLD | Provides steady income through dividends |
| SAMMAANCAP | BUY | Potentially undervalued based on earnings |
| RELIANCE | HOLD | Provides steady income through dividends |
| RELIANCE | HOLD | Provides steady income through dividends |
| PFS | BUY | Potentially undervalued based on earnings |
| PFC | BUY | Potentially undervalued based on earnings |
| ORIENTCEM | HOLD | Potentially undervalued based on earnings |
| NUVAMA | HOLD | Provides steady income through dividends |
| NHPC | HOLD | Potentially undervalued based on earnings |
| NATCOPHARM | HOLD | Provides steady income through dividends |
| INF769K01JP9 | HOLD | Analysis based on fundamentals |
| MAXHEALTH | SELL | May be overvalued based on earnings |
| M&M | SELL | May be overvalued based on earnings |
| LICI | BUY | Potentially undervalued based on earnings |
| LGEINDIA | SELL | May be overvalued based on earnings |
| LT | SELL | May be overvalued based on earnings |
| LALPATHLAB | SELL | May be overvalued based on earnings |
| JSWENERGY | HOLD | May be overvalued based on earnings |
| JIOFIN | HOLD | May be overvalued based on earnings |
| JINDALSAW | BUY | Potentially undervalued based on earnings |

| | | |
|------------|------|---|
| IRCON | HOLD | Provides steady income through dividends |
| INOXINDIA | SELL | May be overvalued based on earnings |
| INFY | HOLD | Provides steady income through dividends |
| ICICIGI | HOLD | May be overvalued based on earnings |
| ICICIBANK | HOLD | Provides steady income through dividends |
| HINDOILEXP | HOLD | Potentially undervalued based on earnings |
| HDFCLIFE | SELL | May be overvalued based on earnings |
| HDFCBANK | HOLD | Provides steady income through dividends |
| HCLTECH | HOLD | Provides steady income through dividends |
| GAIL | BUY | Potentially undervalued based on earnings |
| ETERNAL | SELL | May be overvalued based on earnings |
| DLF | SELL | May be overvalued based on earnings |
| COALINDIA | HOLD | Potentially undervalued based on earnings |
| BHEL | SELL | May be overvalued based on earnings |
| BANKINDIA | BUY | Potentially undervalued based on earnings |
| DMART | SELL | May be overvalued based on earnings |

■ Growth Investing Perspective

| Stock | Action | Key Rationale |
|------------|--------|--|
| BAJFINANCE | HOLD | Analysis based on growth metrics |
| ZEEL | SELL | Analysis based on growth metrics |
| YESBANK | BUY | Strong revenue growth indicates business expansion |
| WIPRO | HOLD | Analysis based on growth metrics |
| IDEA | HOLD | Analysis based on growth metrics |
| VMM | HOLD | Strong revenue growth indicates business expansion |
| V2RETAIL | BUY | Strong revenue growth indicates business expansion |
| ULTRACEMCO | BUY | Strong revenue growth indicates business expansion |
| TRENT | HOLD | Strong revenue growth indicates business expansion |
| TITAN | BUY | Strong revenue growth indicates business expansion |
| TCS | HOLD | Efficient use of shareholder equity |

| | | |
|--------------|------|--|
| TATASTEEL | HOLD | Excellent earnings growth potential |
| TATACONSUM | BUY | Excellent earnings growth potential |
| TCS | HOLD | Efficient use of shareholder equity |
| SUZLON | BUY | Strong revenue growth indicates business expansion |
| SUNPHARMA | HOLD | Stock showing strong price momentum |
| SUMICHEM | SELL | Analysis based on growth metrics |
| SAIL | BUY | Excellent earnings growth potential |
| SRF | HOLD | Excellent earnings growth potential |
| SOBHA | SELL | Analysis based on growth metrics |
| SBIN | HOLD | Stock showing strong price momentum |
| SBICARD | BUY | Strong revenue growth indicates business expansion |
| SAMMAANCAP | SELL | Analysis based on growth metrics |
| RELIANCE | HOLD | Stock showing strong price momentum |
| RELIANCE | HOLD | Stock showing strong price momentum |
| PFS | SELL | Poor performance may indicate growth challenges |
| PFC | HOLD | Efficient use of shareholder equity |
| ORIENTCEM | HOLD | Excellent earnings growth potential |
| NUVAMA | HOLD | Analysis based on growth metrics |
| NHPC | SELL | Analysis based on growth metrics |
| NATCOPHARM | SELL | Analysis based on growth metrics |
| INF769K01JP9 | HOLD | Analysis based on growth metrics |
| MAXHEALTH | BUY | Strong revenue growth indicates business expansion |
| M&M | BUY | Strong revenue growth indicates business expansion |
| LICI | HOLD | Efficient use of shareholder equity |
| LGEINDIA | HOLD | Analysis based on growth metrics |
| LT | HOLD | Stock showing strong price momentum |
| LALPATHLAB | HOLD | Analysis based on growth metrics |
| JSWENERGY | BUY | Strong revenue growth indicates business expansion |
| JIOFIN | HOLD | Strong revenue growth indicates business expansion |
| JINDALSAW | SELL | Analysis based on growth metrics |

| | | |
|------------|------|--|
| IRCON | SELL | Analysis based on growth metrics |
| INOXINDIA | BUY | Strong revenue growth indicates business expansion |
| INFY | HOLD | Efficient use of shareholder equity |
| ICICIGI | HOLD | Analysis based on growth metrics |
| ICICIBANK | HOLD | Stock showing strong price momentum |
| HINDOILEXP | HOLD | Strong revenue growth indicates business expansion |
| HDFCLIFE | HOLD | Strong revenue growth indicates business expansion |
| HDFCBANK | BUY | Strong revenue growth indicates business expansion |
| HCLTECH | HOLD | Efficient use of shareholder equity |
| GAIL | SELL | Analysis based on growth metrics |
| ETERNAL | BUY | Strong revenue growth indicates business expansion |
| DLF | HOLD | Strong revenue growth indicates business expansion |
| COALINDIA | BUY | Strong revenue growth indicates business expansion |
| BHEL | BUY | Strong revenue growth indicates business expansion |
| BANKINDIA | HOLD | Stock showing strong price momentum |
| DMART | HOLD | Analysis based on growth metrics |

■ Performance Highlights

Top 5 Performers

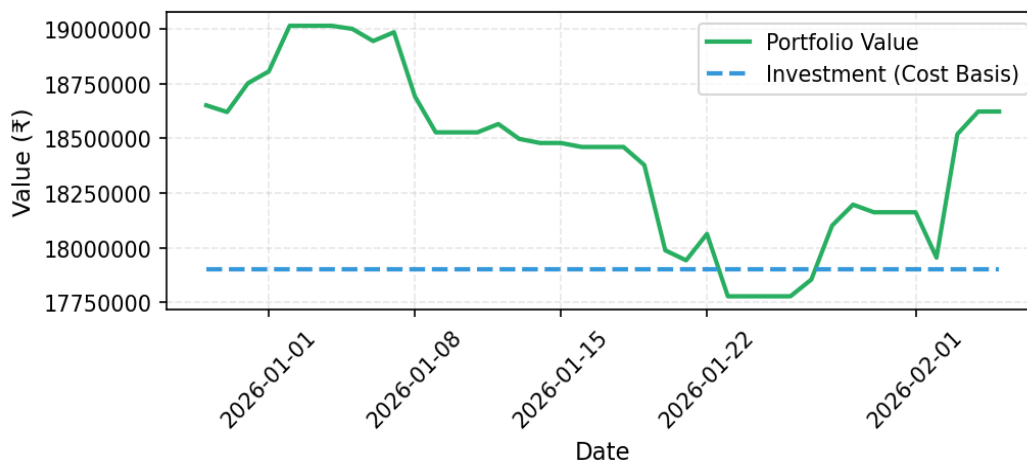
| Stock | Investment | Current Value | Gain/Loss | Return % |
|----------|------------|---------------|-----------|----------|
| ETERNAL | ■630,000 | ■735,375 | ■+105,375 | +16.73% |
| V2RETAIL | ■8,995 | ■10,392 | ■+1,397 | +15.53% |
| IDEA | ■98,400 | ■113,500 | ■+15,100 | +15.35% |
| PFC | ■141,542 | ■162,109 | ■+20,567 | +14.53% |
| BHEL | ■244,000 | ■272,700 | ■+28,700 | +11.76% |

Worst 5 Performers

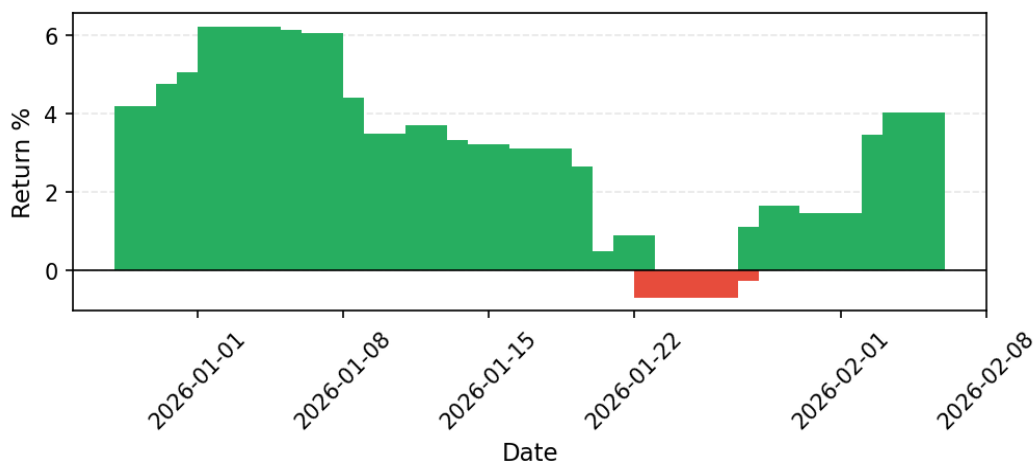
| Stock | Investment | Current Value | Gain/Loss | Return % |
|---------|------------|---------------|-----------|----------|
| PFS | ■170,000 | ■34,470 | ■-135,530 | -79.72% |
| INFY | ■55,440 | ■50,681 | ■-4,759 | -8.58% |
| HCLTECH | ■171,500 | ■162,180 | ■-9,320 | -5.43% |
| TCS | ■204,555 | ■194,942 | ■-9,613 | -4.70% |
| TCS | ■673,244 | ■641,807 | ■-31,437 | -4.67% |

Historical Performance Charts

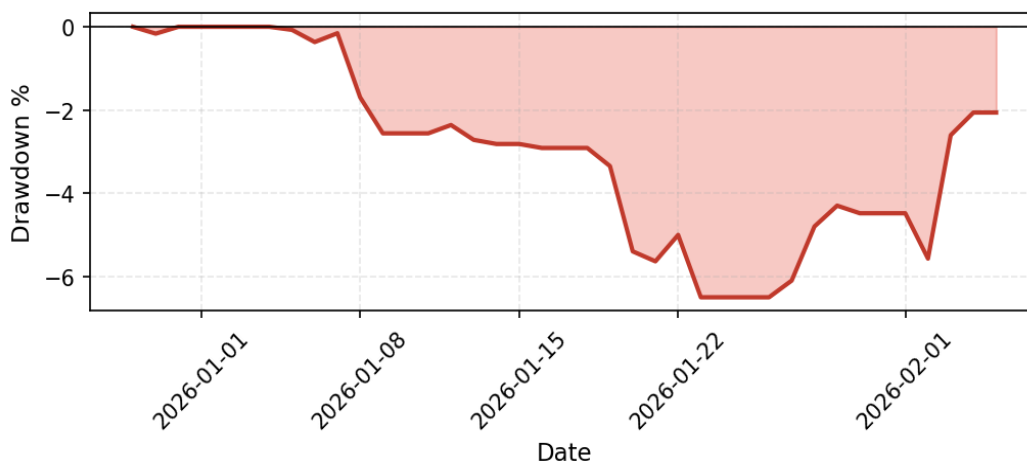
Portfolio Value Over Time



Cumulative Returns Over Time



Drawdown Analysis (Decline from Peak)



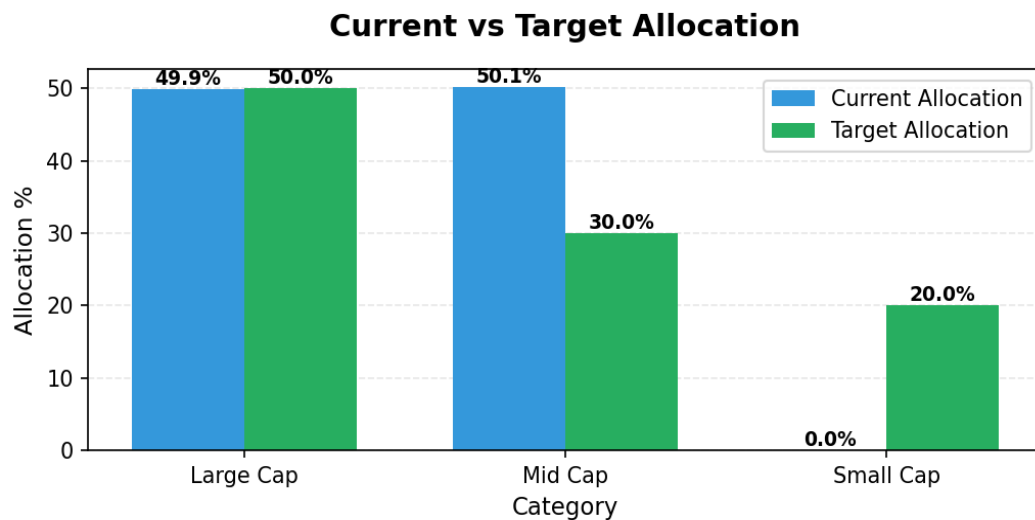
Performance Summary Table

| Metric | Value |
|-------------------------|----------------|
| Initial Portfolio Value | ■18,651,095.87 |
| Current Portfolio Value | ■18,622,606.71 |
| Total Return | -0.15% |
| Peak Portfolio Value | ■19,014,148.57 |
| Current Drawdown | -2.06% |
| Annualized Volatility | 13.53% |

Enhanced Portfolio Rebalancing

Recommended Strategy: Balanced

The Balanced strategy allocates: 50% Large Cap (stability), 30% Mid Cap (growth), 20% Small Cap (high growth potential)



Detailed Rebalancing Actions

| Category | Action | Amount | Description |
|-----------|--------|------------|--|
| Mid Cap | SELL | ■4,061,906 | Reduce Mid Cap allocation by 20.1% |
| Small Cap | BUY | ■4,032,521 | Increase Small Cap allocation by 20.0% |

Implementation Tips

- Rebalance gradually over 2-3 months to minimize market timing risk
- Consider tax implications before selling profitable positions
- Use SIP (Systematic Investment Plan) for accumulating new positions
- Review and rebalance quarterly or when allocation drifts by >5%
- Maintain emergency fund before aggressive rebalancing

Sector Rebalancing Analysis

Recommended Strategy: Balanced

| Category | Current % | Target % | Difference |
|-----------|-----------|----------|------------|
| Large Cap | 49.9% | 50.0% | +0.1% |
| Mid Cap | 50.1% | 30.0% | -20.1% |

| | | | |
|-----------|------|-------|--------|
| Small Cap | 0.0% | 20.0% | +20.0% |
|-----------|------|-------|--------|

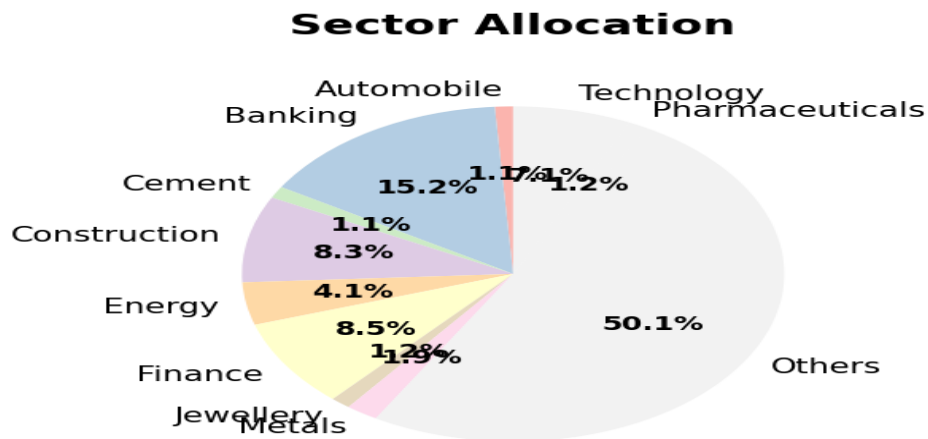
■ Recommended Actions

| Category | Action | Amount | Description |
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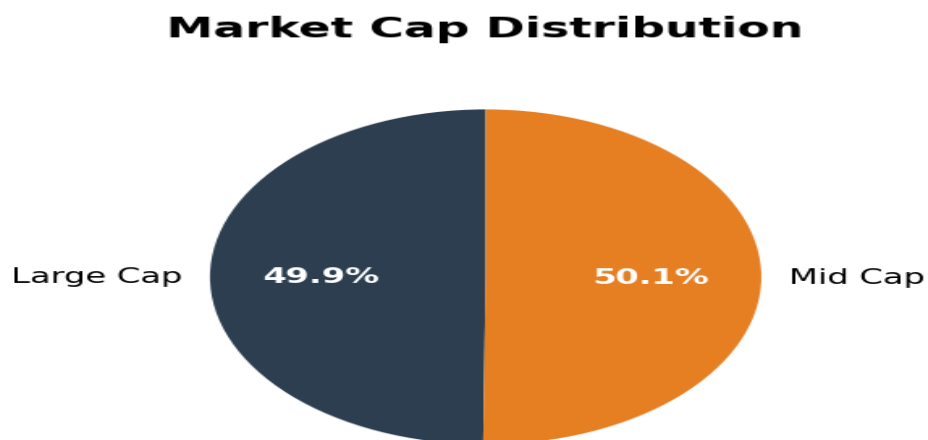
Enhanced Investment Profile

Investment Style Analysis

Sector Allocation Preferences



Market Cap Allocation



Personalized Strategy Recommendations

- Consider alternative investments and international diversification
- Consider consolidating holdings to improve portfolio management

Additional Portfolio Details

| Aspect | Assessment |
|----------------|----------------|
| Portfolio Size | ■20,162,606.71 |

| | |
|--------------------|----------------|
| Investor Category | High Net Worth |
| Number of Stocks | 57 |
| Experience Level | Experienced |
| Overall Return | +3.71% |
| Performance Status | Positive |

■ Investment Style Analysis

| Style Aspect | Analysis |
|-----------------------|---------------------------------------|
| Primary Style | Growth Investor |
| Style Description | Focus on high-growth potential stocks |
| Value-oriented Picks | 11 stocks |
| Growth-oriented Picks | 16 stocks |

■ Portfolio Health Score

| Metric | Score/Status |
|----------------------|--------------|
| Overall Health Score | 75/100 |
| Health Status | Good |
| Diversification | 11 sectors |
| Profitable Holdings | 47/57 stocks |

■ ■ Important Disclaimers

General Disclaimer

This portfolio analysis report is generated for informational purposes only and should not be construed as financial, investment, tax, or legal advice. The information contained in this report is based on historical data and current market conditions, which are subject to change without notice. **Past performance is not indicative of future results.**

All investments involve risk, including the potential loss of principal. The analysis, recommendations, and insights provided in this report are based on quantitative analysis and do not account for all market factors, individual circumstances, or personal financial situations.

Investment Risk Disclaimer

Individual stock recommendations in this report reflect statistical analysis and market trends but should not be considered as guarantees of future performance. Before making any investment decisions, we strongly recommend consulting with a SEBI-registered investment advisor who can assess your individual financial situation, risk tolerance, and investment objectives.

Market conditions, economic factors, regulatory changes, and company-specific events can significantly impact stock performance. Diversification and regular portfolio review are essential components of sound investment management.

Tax Disclaimer

Tax calculations presented in this report are estimates based on prevailing tax rates as per Union Budget 2024. Actual tax liability may vary based on individual circumstances, applicable exemptions, and deductions. The LTCG exemption of ₹1.25 lakh applies annually and may change with future budgets.

We strongly recommend consulting with a qualified Chartered Accountant or Tax Advisor for personalized tax planning advice.

Data Accuracy Disclaimer

Stock prices and market data are sourced from third-party providers and may be delayed or subject to errors. While we strive to provide accurate information, we do not guarantee the accuracy, completeness, or timeliness of any data presented. Dividend yields are based on trailing twelve-month data and may not reflect future dividend payments.

Regulatory Compliance

Alphalens is a portfolio analysis tool and does not provide investment advisory services as defined under SEBI (Investment Advisers) Regulations, 2013. We do not execute trades, manage portfolios, or provide personalized investment recommendations. All investment decisions are the sole responsibility of the user.

About Alphalens

Alphalens is a comprehensive portfolio analysis platform developed by **Edhaz Financial Services Private Limited**. We provide investors with advanced analytical tools to make informed investment decisions through data-driven insights, dual-perspective recommendations, and comprehensive portfolio tracking.

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