

- 1. AIF***
- 2. PMS***
- 3. Mutual Funds***
- 4. IAP & Broking***
- 5. Gift City – International Investments***
- 6. Structured Products***
- 7. Unlisted Investments***



# Exploring AIF & PMS universe

Preferred investment avenue of wealthy individuals



## Alternative Investment Fund

AIFs are pooled investment funds that focus on alternative asset classes beyond traditional stocks and bonds, such as real estate, private equity, hedge funds, startups, and more.



## Portfolio Management Service

PMS provides tailored investment portfolios comprising equity, fixed income instruments and individual securities.

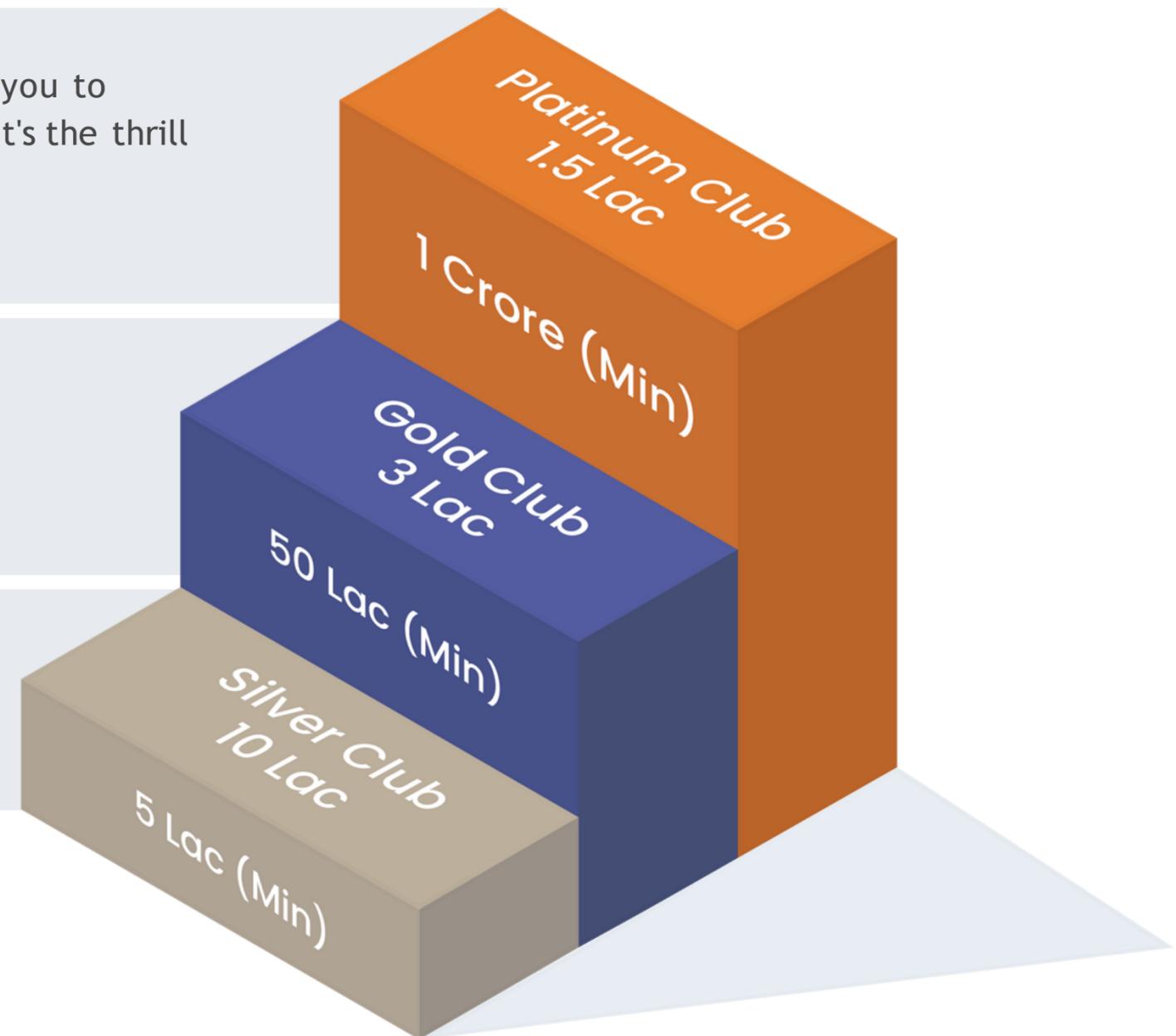
# Join the Elite Club of AIFs and PMS

Why settle for the ordinary when you can be extraordinary?

AIFs offer an exhilarating off-road adventure, allowing you to explore uncharted terrain in the world of investments. It's the thrill of navigating beyond the conventional.

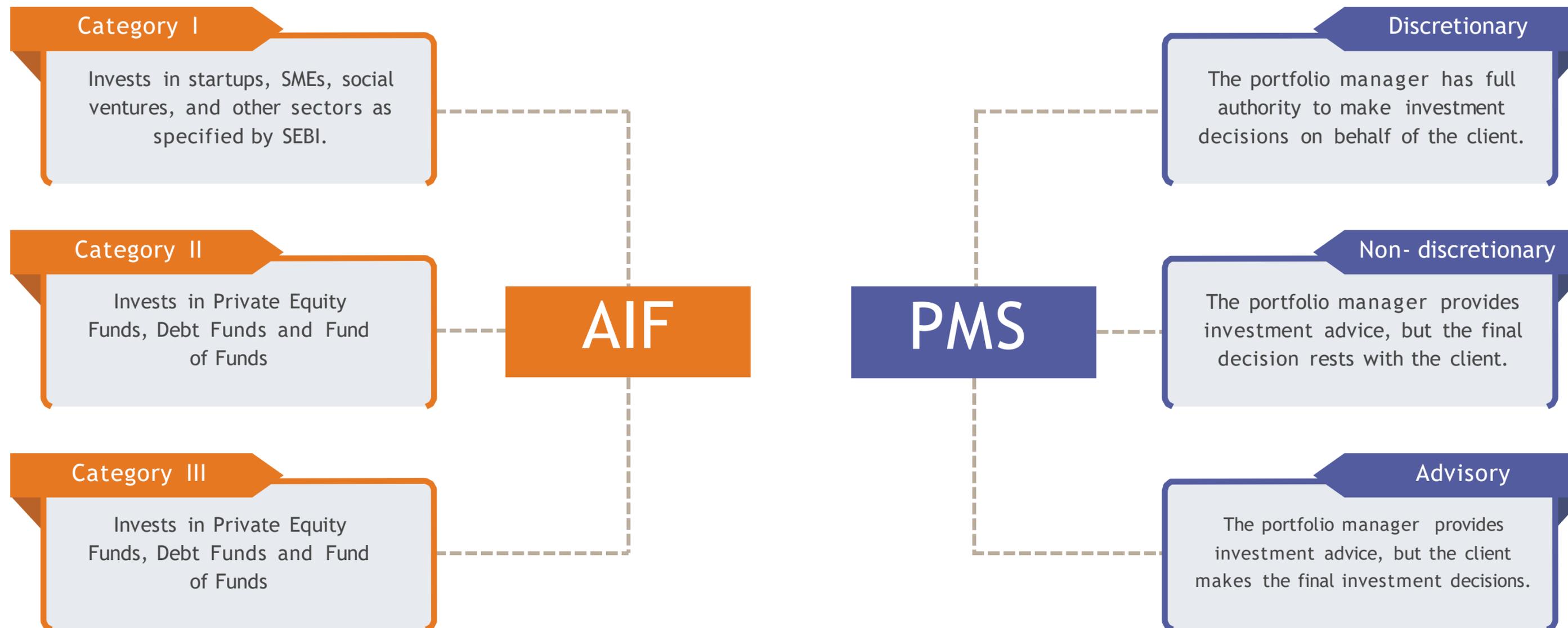
PMS is akin to having a luxury and personal chauffeur who tailors the entire investment journey just for you. It's the bespoke experience in wealth management.

Investing in Mutual Funds is like hopping on a bus. You're one of many passengers on a collective journey.



# Types of AIF & PMS

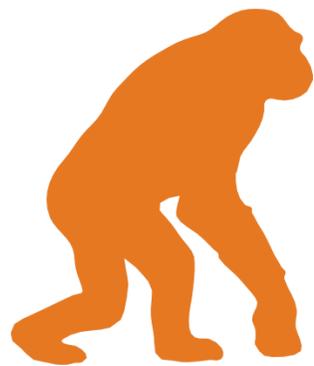
Exclusive investment opportunities tailored for elite investors



# History of AIF and PMS

## Evolution of AIF & PMS

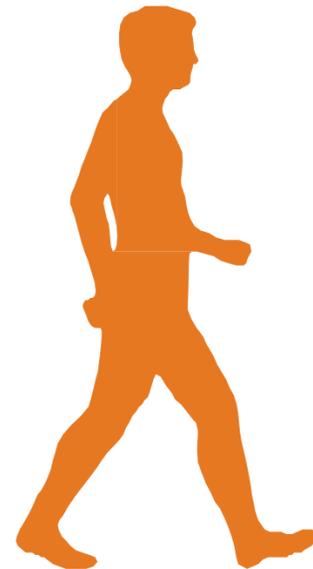
### AIF



AIF was regulated in 2012 by SEBI

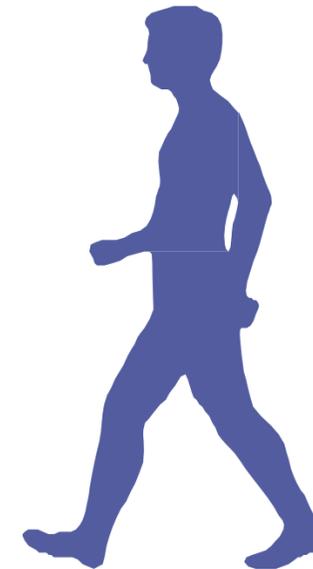


The first AIF was launched in India in 2012-13

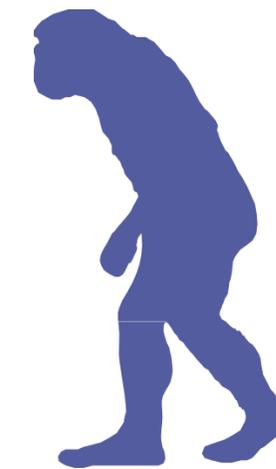


AIF has evolved under SEBI guidelines over 10 years

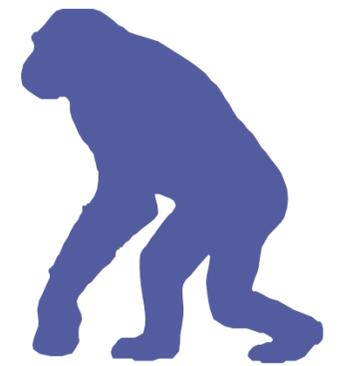
### PMS



PMS has evolved under SEBI guidelines over 30 years



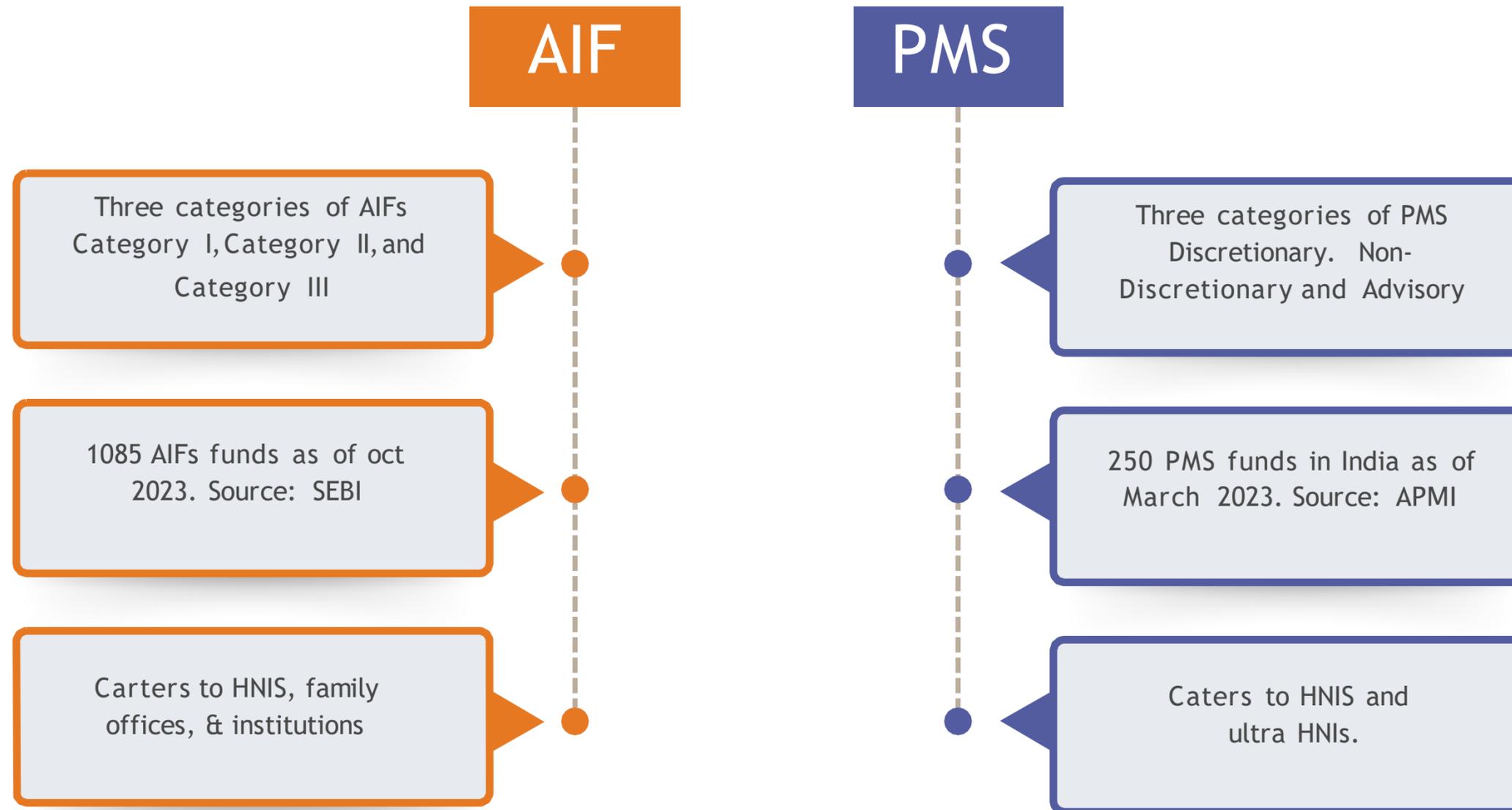
The first PMS was launched in 2000



PMS was regulated in 1993 by SEBI

# The Abundance of Funds in AIF and PMS

Shaping the financial journeys of affluent individuals



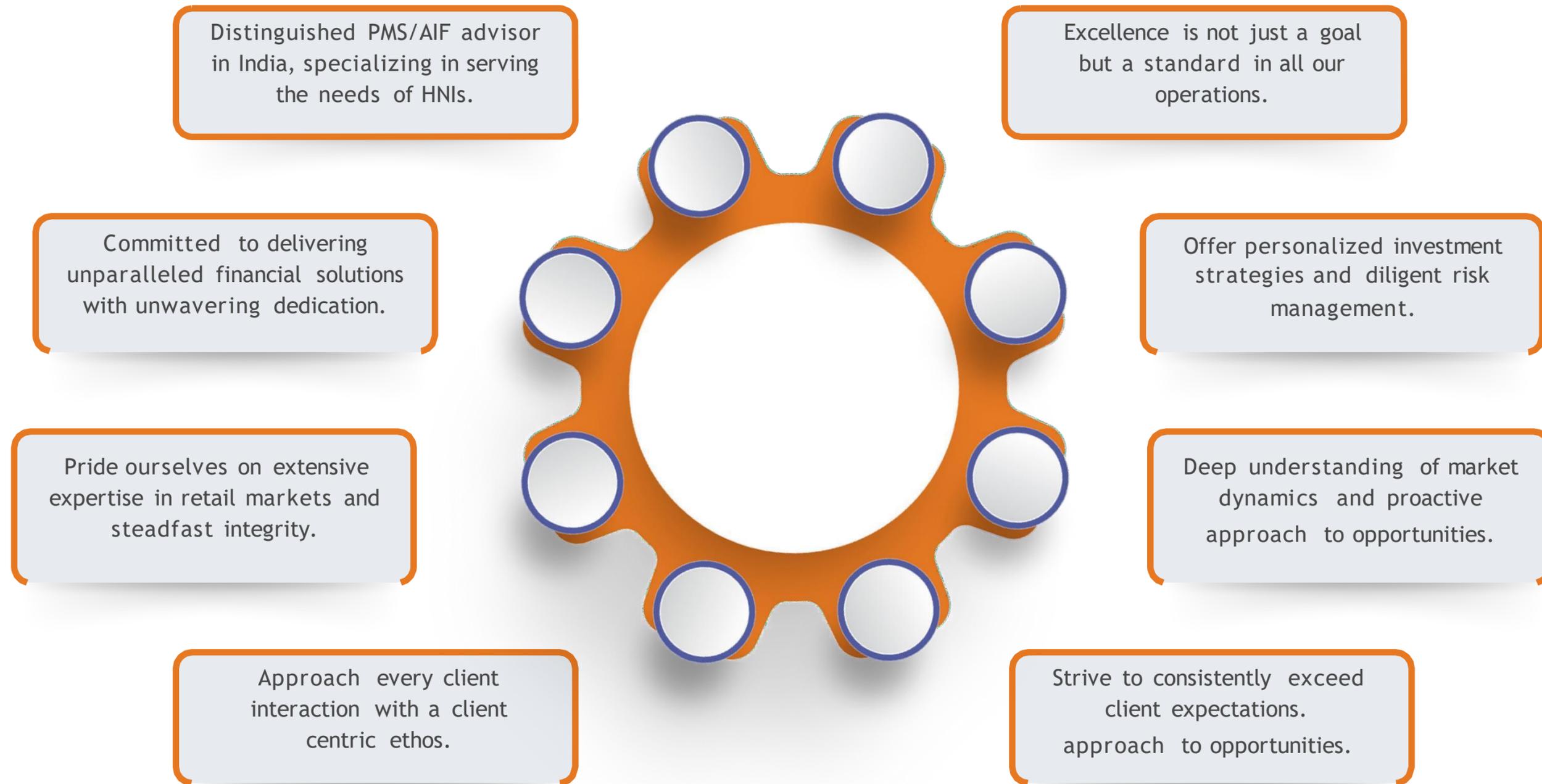
# ALTPORT

Process-driven wealth creation



# We elevate financial horizons for elites

Empowering affluent with tailored solutions



# Leverage our unparalleled investment capabilities

You entrust your wealth to seasoned professionals



Our investment prowess sets us apart in investment management, providing a unique advantage to our clients.

We excel in tailoring investment strategies to individual client needs, ensuring optimal alignment with their financial objectives.

With a comprehensive understanding of asset classes and market dynamics, we empower clients to make informed investment decisions.

Access to diverse asset classes- equities, fixed income, and alternatives-offers our ultra HNI clients unparalleled opportunities for portfolio diversification and wealth preservation.

Our seasoned team adeptly navigates dynamic market conditions, discerns emerging trends, and capitalizes on lucrative investment opportunities domestically.

Our commitment to excellence in investment management is evident in our pursuit of innovative strategies and rigorous risk management practices.

# Why Choose ALTPORT?

A process-driven investment approach

Over 350  
investors have  
invested in our  
process.



Over ₹500 crores  
have been  
invested using  
our process.

Trusted by  
investors  
across 10  
countries.



Over 15,000  
investors use  
our tools before  
deciding to  
invest.

# Why we stand as the exclusive choice?

The panorama of benefits beyond returns



## Investment Committee

Our seasoned veterans, who have weathered multiple capital market cycles, scrutinize every portfolio.

## Guidance in Storms and Calms

We stand by you through market fluctuations, helping you stay focused on your objectives.

## Rigorous Selection Process

We meticulously handpick investments aligned with your goals using our 31s selection approach

## Consistency Score

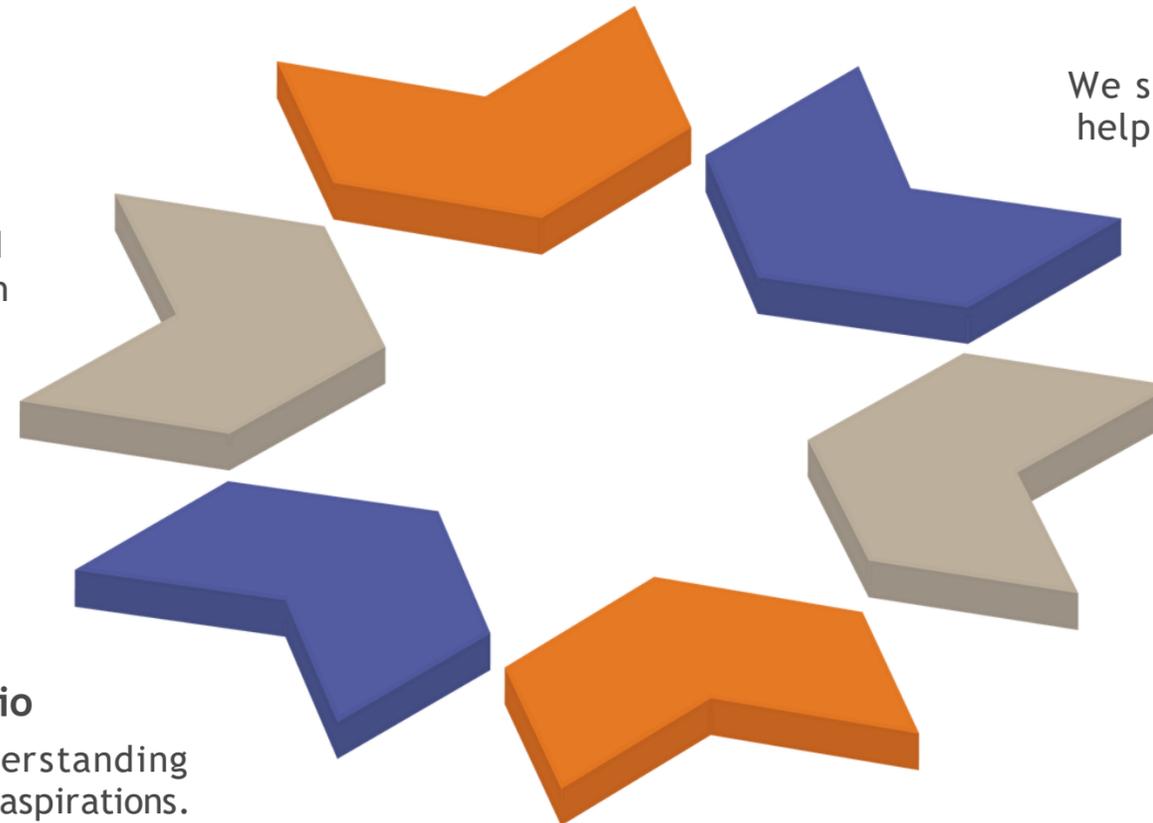
Our measurable consistency score delivers stability to your portfolio

## Personalised Portfolio

We craft your portfolio after understanding your risk appetite and financial aspirations.

## Domain Expertise in AIF & PMS

Our highly qualified team, with over 16 years of capital market experience, steers your investments.



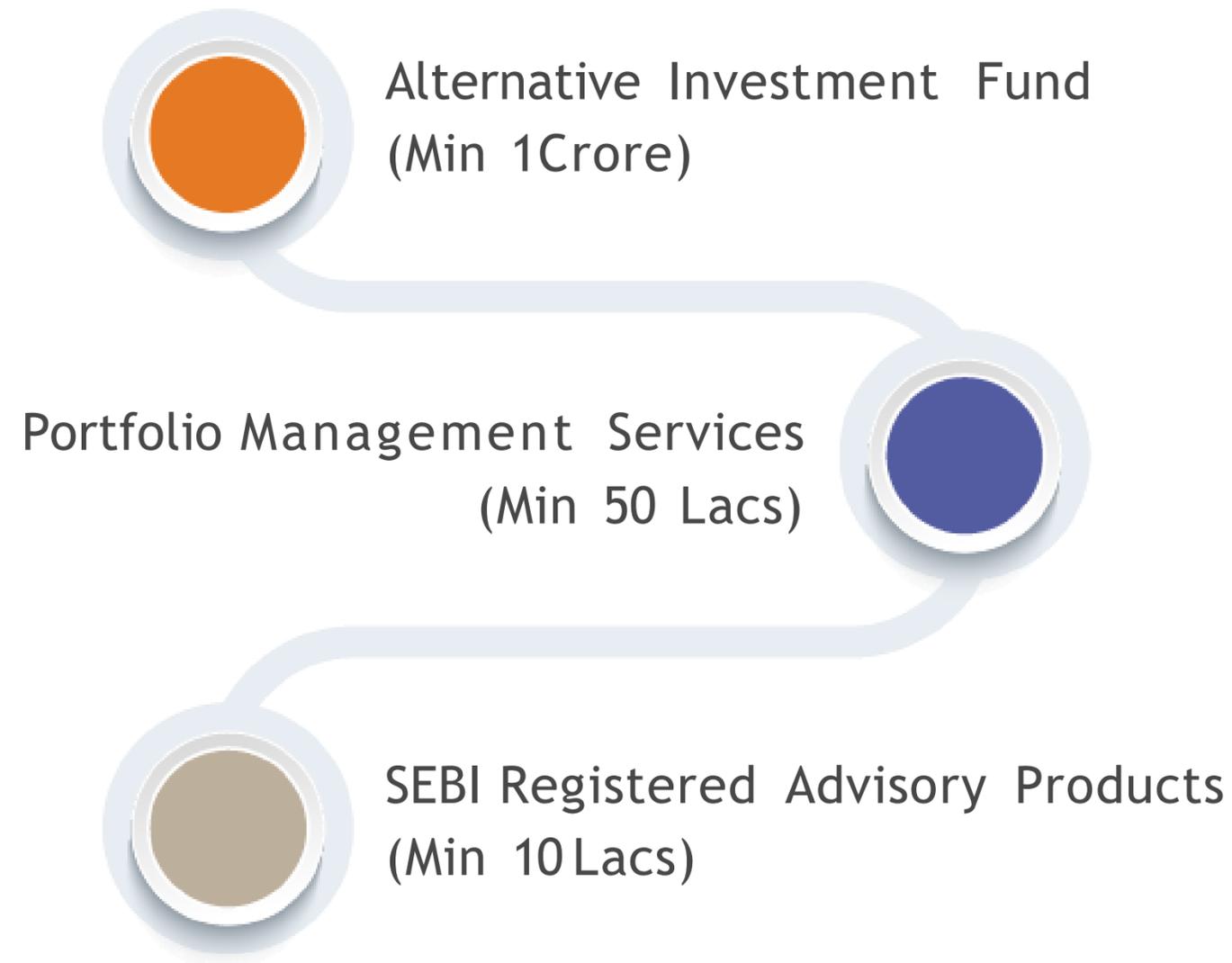
# Strategic fund selection for portfolio optimization

Finding the right match for your financial goals



# Diverse investment avenues tailored for you

Divided by category, united by our investing process



# Media Interactions



Featured on Zee Business

Featured on  
News Channel



Featured on Zee Business



[Equity Market Outlook And Opportunity](#)

Featured on  
YouTube



[Make Strategic Investments](#)

# Process-driven returns

A proven process for consistency



# Process-driven wealth creation

We meticulously follow our investing process

## Investment Style

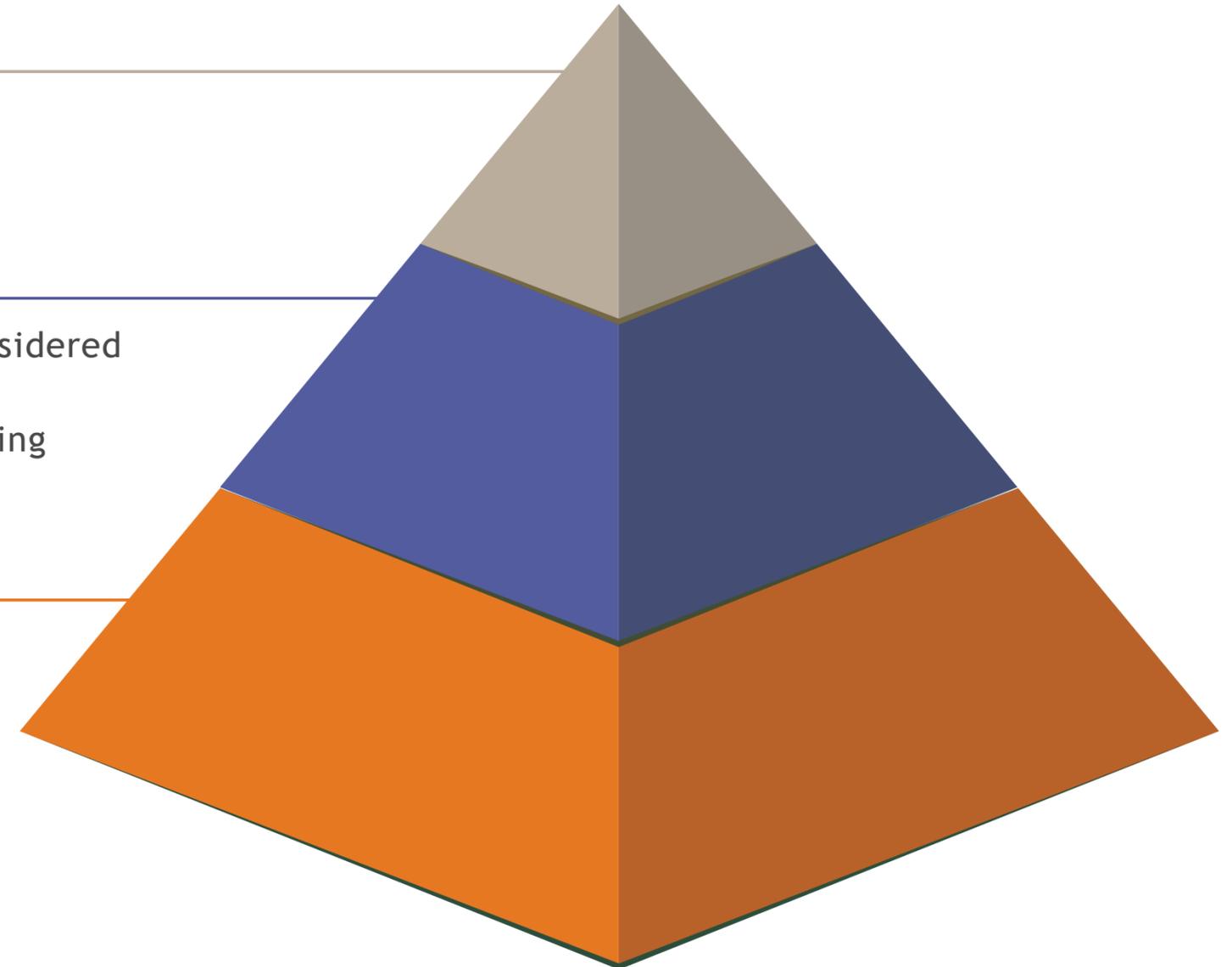
Clear, adaptable strategies aligned with investor goals, crucial for navigating market fluctuations and capitalizing on opportunities.

## Investment Quality

Focusing on the intrinsic value and fundamentals of the assets being considered for investment. Exploring the qualitative aspects such as management competence, competitive advantage, and financial health of the underlying companies or assets.

## Investment Performance

Emphasizing consistent, risk-adjusted returns and effective draw down management to achieve long-term growth while preserving capital.



# The imperative of an investing process

A compass for systematic wealth creation



## Guidance Amidst Uncertainty

An investment process acts as your compass especially during uncertain times.

## Avoiding Emotional Pitfalls

A well-defined process helps you stay rational, preventing knee-jerk reactions based on fear or greed.

## Consistency in Decision-Making

An investment process ensures you make informed choices consistently, regardless of market noise.

## Customization to Your Goals

An investment process tailors strategies to your unique financial objectives, whether it's retirement, or wealth accumulation.

## Risk Management

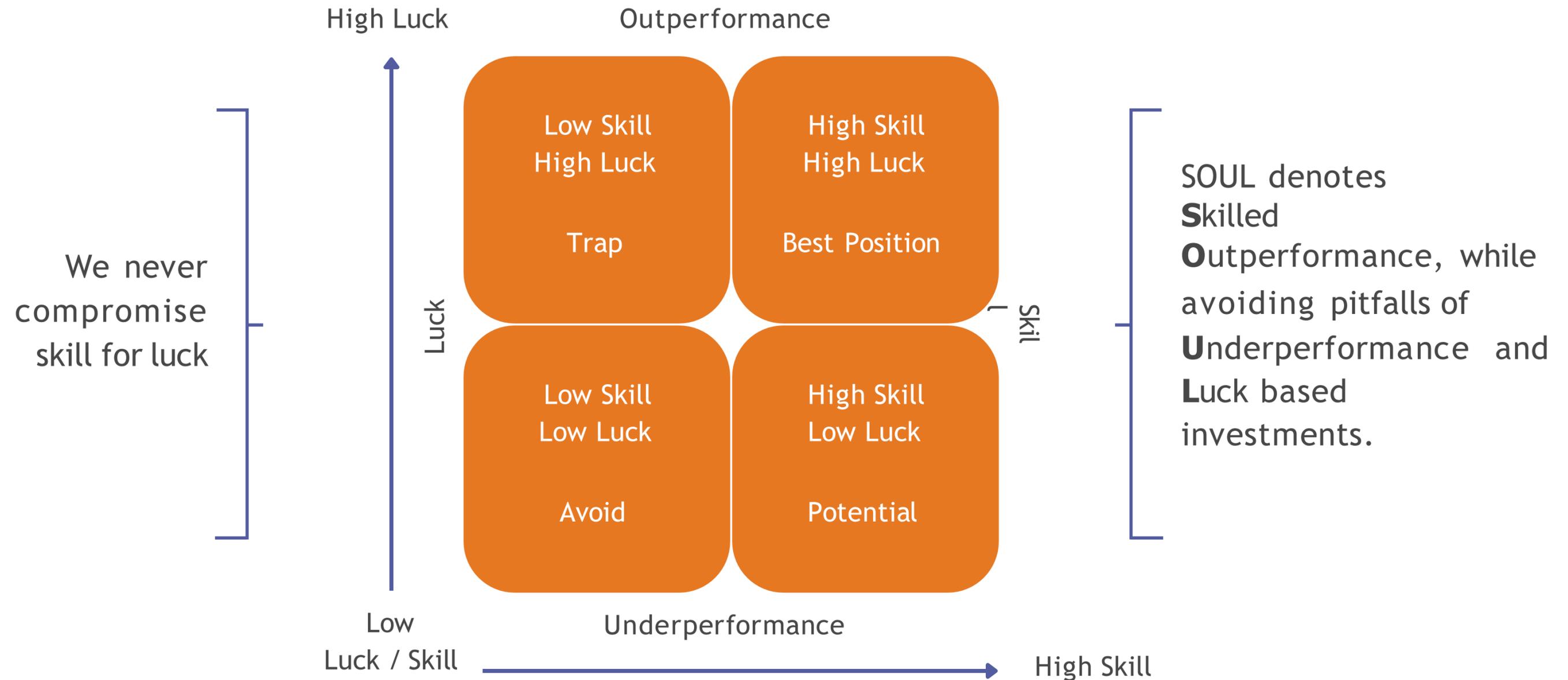
Like a safety net, a process assesses and manages risks. It helps you strike a balance between growth and protection.

## Long-Term Perspective

An investment process ensures you make informed choices consistently, regardless of market noise.



# The soul of our fund selection philosophy is SOUL



# Skill and luck jointly shape alpha

We never compromise skill for luck

## Luck

- Not always reliable
- Investments based solely on luck lack consistency and sustainability

## Skilful Investments

- Provide better risk-adjusted returns historically
- Indicate promising future outcomes

## Fund Selection Process

- Emphasizes funds with proven returns from robust investment processes by Portfolio Managers

## Skill

- Key attribute for generating consistent alpha
- Drives successful investment outcomes

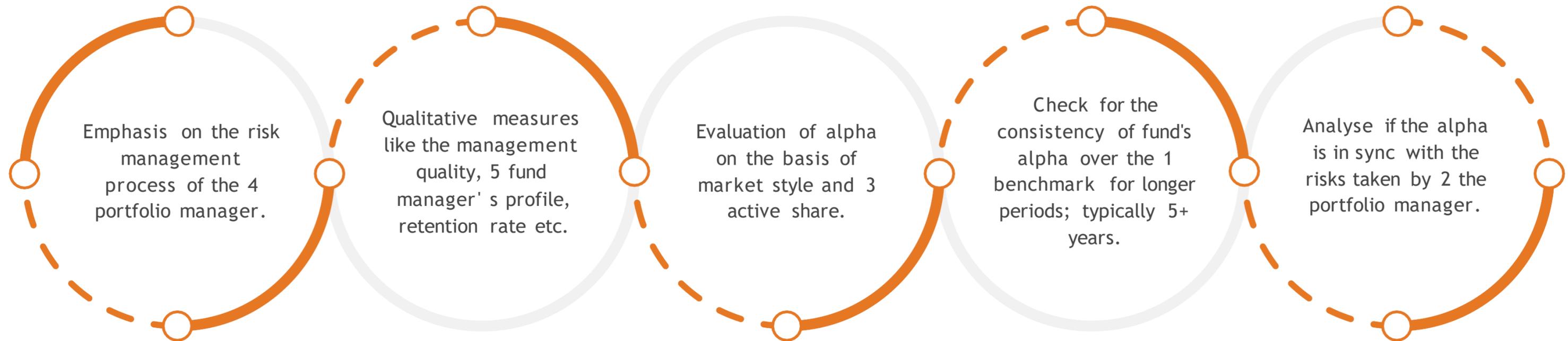
## Analyzing Fund Allocation

- Considers the balance between luck and skill in our investors' fund allocations



# Fund selection process

Our rigorous fund manager selection process ensures that you have the best fund managers In your portfolio



**A Once-in-a-Lifetime Opportunity: Our founder  
Mr. Vikas Agarwal Meets Warren Buffett  
and Charlie Munger at  
Berkshire Hathaway  
AGMI 2016**



# Validations of our unique investing process



**Avinash Bhandari**

Founder and Managing Partner  
Think North Management Consultants

## Testimonial from our investor

Before discovering ALTPORT and meeting Vikas, I had consulted with numerous prominent wealth managers, yet none could tailor a portfolio to match my unique needs. Frustrated by the lack of suitable solutions from leading wealth management firms, I was skeptical about finding the right fit.

However, upon meeting Vikas, I was impressed by his meticulous approach. He took the time to thoroughly profile me from various angles, ensuring a deep understanding of my financial objectives. Utilizing his innovative investing process, Vikas crafted a personalized portfolio tailored to my specific requirements. Despite having to forego some trending funds that didn't align with his investing philosophy, Vikas's commitment to my long-term financial success was evident from the start.

5 years later, I am still with ALTPORT, entrusting them with my entire investment portfolio. Vikas and his team have consistently demonstrated their unwavering support, guiding me through both prosperous and challenging times. Thanks to their expertise and dedication, I have been able to stay focused on my financial goals, tuning out the distractions of short-term market fluctuations. My journey with ALTPORT has been nothing short of transformative, and I am grateful for their continued partnership.

# Validations of our unique investing process



**Bipinchandra Dugam**

Senior Drilling & Completions Manager

## Testimonial from our investor

I used to distribute my investments among various wealth managers, resulting in a fragmented and challenging tracking process. The frequent turnover of relationship managers (RMs) added to the instability, while unwanted fund sales and excessive portfolio churn led to subpar performance. Poor client service further eroded my confidence, leaving me feeling adrift and unsupported in my financial journey.

However, upon meeting Vikas, my investment experience underwent a remarkable transformation. He not only guided me through the process of portfolio construction but has continued to provide unwavering support ever since. Consolidating my investments under his stewardship, Vikas ensured a stable relationship by retaining my RM, fostering a bond that transcended mere investment transactions.

AIF & PMS Experts demonstrated a commitment to my financial well-being by conducting periodic portfolio reviews and making adjustments only when aligned with my goals and their investing process. This approach eliminated the need for frequent churn, resulting in improved portfolio performance.

Over the past nine years, my journey with ALTPORT has been nothing short of delightful. I commend Vikas and his team for their dedication and wish them continued success.

# Process-oriented portfolios

Unbiased and customized portfolios



# Funds that undergo rigorous scrutiny

We only recommend funds aligned with our 31 criteria



Fund selection at our firm is more than a process; it's an art dedicated to maximizing returns and minimizing risks.

Our methodical approach integrates rigorous research, competitive analysis, and a forward-thinking investment philosophy.



We employ a comprehensive methodology, including thorough due diligence, quantitative and qualitative assessments, performance evaluations and continuous monitoring of fund managers and strategies.

Our commitment to excellence in fund selection is evident in our dedication to staying abreast of market trends and adapting strategies accordingly.



Each fund undergoes meticulous scrutiny to ensure alignment with clients' objectives and our high performance standards.

We optimize investment outcomes by combining empirical data with astute judgment, resulting in a robust and dynamic fund selection process.



# Awards and recognitions

Our commitment to excellence has been honoured with prestigious awards and accolades.



# Our trusted investment partners

Curated through our rigorous Investing process



# Process-driven product selection

Curated through our rigorous investing process



## AIF Products

Abakkus Emerging Opportunity Fund

First Water Capital Fund

Emerging Leaders Of Tomorrow Series 2

First Water Capital Fund - I

Carnelian Structural Shift Fund

## PMS Products

Abakkus Emerging Opportunity Fund

Carnelian Shift Strategy

Green Lantern Capital Alpha

ICICI Contra & Pipe

Motilal Oswal Mid To Mega

# Process-driven performance: AIF



Product Name	1yr (%)	3yr (%)	5yr (%)	Inception
Abakkus Emerging Opportunity Fund	12.3	25.9	42.6	32.1
First Water Capital Fund	6.1%	28.7%	NA	35.5%
Emerging Leaders Of Tomorrow Series 2	5.1%	NA	NA	28.8%
First Water Capital Fund - I	7.6%	NA	NA	27.5%
Carnelian Structural Shift Fund	16.3%	27.7%	NA	26.8%

Data as on : 31/05/2025

Disc: Past returns may not guarantee future returns

# Process-driven performance: PMS



Product Name	1yr (%)	3yr (%)	5yr (%)	Inception
Green Lantern - GL Alpha Fund	10.29	36.38	40.99	34.82
ICICI Prudential PMS Contra Strategy	4.28	26.53	30.13	20.27
Carnelian Shift Strategy	21.71	32.94	NA	38.12
Abakkus Emerging Opp Approach	17.89	26.97	NA	32.74
Motilal Oswal Mid To Mega Strategy	21.04	25.86	31.62	26.16

Data as on : 31/05/2025

Disc: Past returns may not guarantee future returns

# Integrated financial solutions

Solutions extending beyond investments



## Family Office

We offer personalized financial management, ensuring the preservation and growth of your family's wealth for current and future generations.



## Estate Planning

We work closely with you to create a comprehensive plan that safeguards your assets, minimizes tax implications, and ensures a smooth transition for your loved ones.



## Trust Formation

We guide you through the intricacies of trust creation, providing a secure framework for wealth transfer while aligning with your values and aspirations.



## Taxation Consultancy

Through our empaneled Chartered accountant, we devise tailored strategies for optimal tax management.

# Process-oriented team

We live by our process



## About the Founder



Vikas Agrawal | Founder & CEO

Mr. Vikas Agrawal is a Founder and CEO of ALTPORT

He is a MBA graduate with specialization in finance. He has also pursued the various investment courses from Flame University Pune. With over two decades of expertise in the Asset & Wealth Management Industry. Mr. Vikas Agrawal India's most trusted voice on Investments in Alternative investment fund & Portfolio Management Services. Mr. Vikas Frequently appears on Zee Business, ET Market, and ET Now Channels to offer his perspectives on capital markets. Additionally, he has attended Berkshire Hathaway AGM's where he had the opportunity to meet Warren Buffet and Charlie Munger in person. Vikas consistently share his learnings from these experiences with his investors.

# Solutions extending beyond investments

The guardians of our investing process



Samir Kumar | Chief Business Officer

Mr. Samir Kumar is a seasoned professional with over 20 years of extensive experience in the share market and currently serves as the Chief Business Officer (CBO) at AIF & PMS. Holding an MBA in Marketing & HR and a Professional Trader Certification from the prestigious Online Trading Academy (OTA), he possesses in-depth knowledge of financial markets and trading strategies. Specializing in driving business growth, optimizing revenue streams, and developing client-centric strategies for high-net-worth individuals (HNIs) and ultra-HNIs, Mr. Kumar focuses on key investment offerings such as Mutual Funds, Portfolio Management Services (PMS), Alternative Investment Funds (AIF), and Gift City accounts. He is a proven leader with a strong focus on leading high-performance sales teams, fostering collaboration, and aligning organizational goals with evolving market trends to ensure sustainable growth and profitability.



Let's embark on a journey to create wealth

We live by our process!

Follow us :



Alport for HNIS



Altport Experts



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**Thank You**

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