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# PMS Performance

Source: APMI | September 2026 Report



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SEPT 2026



## Top 10 PMS Strategies — Ranked by 1-Year Returns

Performancesnapshot across 1-month to since-inceptionhorizons

| PMS Provider Name                       | IA Name                                        | 1m     | 3m     | 6m      | 1y            | 2y     | 3y     | 5y     | SI     |
|-----------------------------------------|------------------------------------------------|--------|--------|---------|---------------|--------|--------|--------|--------|
| Amaltas Asset Management LLP            | AMALTAS STRATEGIC OPPORTUNITIES SERIES I       | 10.54% | 22.07% | 30.87%  | <b>48.38%</b> | NA     | NA     | NA     | 48.09% |
| Dezerv Investments Private Limited      | Strategic Holdings In Natural Elements (SHINE) | 0.95%  | -5.12% | -11.09% | <b>47.93%</b> | NA     | NA     | NA     | 40.62% |
| Sundaram Alternate Assets Limited       | Rising Stars                                   | -0.49% | 9.09%  | 30.42%  | <b>41.89%</b> | 19.07% | 16.29% | 15.65% | 15.19% |
| Sundaram Alternate Assets Limited       | S.E.L.F                                        | -1.98% | 8.10%  | 26.79%  | <b>35.56%</b> | 18.77% | 21.86% | 15.53% | 18.11% |
| AlfAccurate Advisors Pvt Ltd            | AAA Couture Portfolio                          | 0.11%  | 18.39% | 36.60%  | <b>32.87%</b> | 17.07% | NA     | NA     | 23.35% |
| Sundaram Alternate Service Private      | SISOP                                          | -2.07% | 7.76%  | 25.47%  | <b>32.61%</b> | 21.81% | 24.17% | 17.02% | 18.68% |
| Wallfort Fund Management LLP            | Wallfort Avenue Fund                           | 6.98%  | 6.91%  | 17.68%  | <b>31.43%</b> | 10.57% | 26.62% | NA     | 25.80% |
| East Green AdvisorsLLP                  | Quant Strategy                                 | -4.23% | 10.58% | 22.73%  | <b>31.23%</b> | 7.23%  | NA     | NA     | 12.96% |
| Vallum Capital Advisor Pvt Ltd          | Vallum Multi Activa Strategy                   | 1.19%  | 1.85%  | 1.40%   | <b>30.48%</b> | NA     | NA     | NA     | 24.01% |
| Aequitas Investment Consultancy Pvt Ltd | India Opportunities Product                    | 0.47%  | -5.41% | -10.48% | <b>30.09%</b> | 18.95% | 28.54% | 29.55% | 31.84% |

■ Bold column = ranking basis (1y)

Returns are as on 31st Jul 2026. Past performance may or may not sustain in future. Investment in AIF & PMS is subject to market risk; please read all the documents carefully before investing. ALTPORT does not guarantee any performance or return.



## Top 10 PMS Strategies — Ranked by 3-Year Returns

Performancesnapshot across 1-month to since-inceptionhorizons

| PMS Provider Name                         | IA Name                         | 1m     | 3m     | 6m      | 1y     | 2y     | 3y            | 5y     | SI     |
|-------------------------------------------|---------------------------------|--------|--------|---------|--------|--------|---------------|--------|--------|
| Wallfort Fund Management LLP              | Diversified Fund                | 4.44%  | 15.29% | 24.28%  | 8.26%  | 7.94%  | <b>34.27%</b> | 25.41% | 23.89% |
| Stallion Assets Pvt Ltd                   | Core Fund                       | 2.12%  | 12.61% | 18.32%  | 15.26% | 15.03% | <b>33.79%</b> | 23.96% | 28.10% |
| Incred Asset Management                   | Focused Healthcare Portfolio    | 4.05%  | 15.52% | 6.73%   | -2.26% | 24.83% | <b>32.06%</b> | NA     | 37.04% |
| White Pine Investments Management Pvt Ltd | White Pine India Emerging Stars | 0.57%  | 14.66% | 25.82%  | 19.79% | 14.96% | <b>31.24%</b> | NA     | 36.59% |
| Green Lantern LLP                         | Growth Fund                     | -1.38% | -0.09% | 9.17%   | 9.08%  | 2.08%  | <b>31.14%</b> | 29.07% | 22.71% |
| Aequitas Investment Consultancy Pvt Ltd   | India Opportunities Product     | 0.47%  | -5.41% | -10.48% | 30.09% | 18.95% | <b>28.54%</b> | 29.55% | 31.84% |
| Green Portfolio Pvt Ltd                   | Dividend Yield Fund             | 4.23%  | 8.93%  | 20.17%  | 23.99% | 11.85% | <b>27.20%</b> | 23.84% | 30.10% |
| Asit C Mehta Investment Intermediates Ltd | Ace Ten Trillion Opportunities  | 5.49%  | 18.49% | 29.69%  | 19.80% | 4.18%  | <b>26.73%</b> | 24.78% | 19.48% |
| Accuracap                                 | Dynamo                          | 1.29%  | 11.14% | 22.27%  | 6.85%  | 5.72%  | <b>26.71%</b> | 19.46% | 23.48% |
| Wallfort Fund Management LLP              | Avenue Fund                     | 6.98%  | 6.91%  | 17.68%  | 31.43% | 10.57% | <b>26.62%</b> | NA     | 25.80% |

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## Top 10 PMS Strategies — Ranked by 5-Year Returns

Performancesnapshot across 1-month to since-inceptionhorizons

| PMS Provider Name                        | IA Name                        | 1m     | 3m     | 6m      | 1y     | 2y     | 3y     | 5y            | SI     |
|------------------------------------------|--------------------------------|--------|--------|---------|--------|--------|--------|---------------|--------|
| New Berry Capital Private Limited        | Seeking Alpha                  | 2.81%  | 6.77%  | 9.91%   | 14.93% | 8.70%  | 17.47% | <b>32.92%</b> | 7.20%  |
| Green Lantern Capital LLP                | Growth Fund                    | -1.38% | -0.09% | 9.17%   | 9.08%  | 2.08%  | 31.14% | <b>29.70%</b> | 22.71% |
| Aequitas Investments Consultancy Pvt Ltd | India Opportunities Product    | 0.47%  | -5.41% | -10.48% | 30.09% | 18.95% | 28.54% | <b>29.55%</b> | 31.84% |
| Counter Cyclical Investment Pvt Ltd      | Diversified Long Term Value    | 4.38%  | 13.09% | 18.78%  | 4.00%  | 3.61%  | 20.04% | <b>28.21%</b> | 44.99% |
| Wallfort Fund Management LLP             | Diversified Fund               | 4.44%  | 15.29% | 24.28%  | 8.26%  | 7.94%  | 34.27% | <b>25.41%</b> | 23.89% |
| Asit C Mehta Investment Intermediates    | Ace Ten Trillion Opportunities | 5.49%  | 18.49% | 29.69%  | 19.80% | 4.18%  | 26.73% | <b>24.78%</b> | 19.48% |
| Stallion Assets Pvt Ltd                  | Core Fund                      | 2.12%  | 12.61% | 18.32%  | 15.26% | 15.03% | 33.79% | <b>23.96%</b> | 28.10% |
| Green Portfolio Pvt Ltd                  | Dividend Yield Fund            | 4.23%  | 8.93%  | 20.17%  | 23.99% | 11.85% | 27.20% | <b>23.84%</b> | 30.10% |
| AlfAccurate Advisors                     | AAA Budding Beasts             | 0.70%  | 12.51% | 20.67%  | 15.88% | 9.29%  | 21.76% | <b>22.61%</b> | 25.90% |
| Samvitti Capital Pvt Ltd                 | PMS Active Alpha Multicap      | -0.39% | 11.44% | 25.38%  | 8.32%  | -2.06% | 20.55% | <b>22.22%</b> | 26.41% |

■ Bold column = ranking basis (5y)

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## Top 10 PMS Strategies — Ranked by 10-Year Returns

Performance snapshot across 1-month to since-inception horizons

| PMS Provider Name                        | IA Name                            | 1m     | 3m     | 6m      | 1y     | 2y     | 3y     | 5y            | 10y    | SI     |
|------------------------------------------|------------------------------------|--------|--------|---------|--------|--------|--------|---------------|--------|--------|
| Aequitas Investments Consultancy Pvt Ltd | India Opportunities Product        | 0.47%  | -5.41% | -10.48% | 30.09% | 18.95% | 28.54% | <b>29.55%</b> | 26.16% | 31.84% |
| Sameeskha Capital Pvt Ltd                | India Equity Fund                  | 3.32%  | 11.29% | 11.20%  | 4.43%  | 6.56%  | 18.57% | 17.50%        | 20.96% | 20.96% |
| Buoyant Capital Pvt Ltd                  | Opportunities                      | 1.73%  | 3.44%  | 2.87%   | 8.13%  | 8.48%  | 16.18% | 18.39%        | 20.35% | 20.76% |
| 2Point2 Capital                          | Long Term Fund                     | 3.20%  | 4.30%  | -0.80%  | 5.00%  | 10.70% | 15.10% | 16.00%        | 18.90% | 19.10% |
| Valuequest Investment Advisors Pvt Ltd   | Platinum                           | 2.62%  | 10.32% | 20.31%  | 5.50%  | 1.15%  | 14.22% | 16.13%        | 18.39% | 18.70% |
| Accuracap                                | Picopower                          | -0.24% | 8.68%  | 19.03%  | 7.96%  | 1.98%  | 17.52% | 13.57%        | 17.95% | 21.96% |
| Master Portfolio Services Ltd            | Master Trust India Growth Strategy | -1.27% | 6.07%  | 12.80%  | 0.16%  | 2.43%  | 12.97% | 13.31%        | 17.76% | 24.00% |
| Globe Capital Market Ltd                 | Arbitrage                          | 2.42%  | 8.57%  | 5.72%   | 7.56%  | 0.93%  | 12.97% | 12.70%        | 17.50% | 14.46% |
| Solidarity Advisors Pvt Ltd              | Prudence                           | 2.19%  | 17.31% | 26.78%  | 22.91% | 15.45% | 16.06% | 11.47%        | 17.27% | 17.87% |
| Moneybee Securities Pvt Ltd              | Queenbee                           | 2.08%  | 8.44%  | 13.63%  | -7.45% | -5.56% | 13.96% | 19.79%        | 17.11% | 19.44% |

■ Bold column = ranking basis (5y)

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