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PMS
Performance

Source: APMI | November 2026 Report

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NOVEMBER 2026

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PMS Performance

Top 10 PMS Strategies — Ranked by 1-Year Returns

Performance snapshot across 1-month to since-inception horizons

Scheme Name	PMS Provider Name	1m	3m	6m	1y	2y	3y	5y	10y	SI
Quant Strategy	East Green Advisors	-4.36%	15.56%	27.78%	49.00%	17.87%	NA	NA	NA	18.23%
Emerging Leaders	Solidarity Advisors	-10.95%	3.95%	37.68%	37.15%	14.58%	17.61%	NA	NA	17.33%
Keystone Fund	Amaltas AMC	-11.04%	-0.69%	24.37%	34.51%	NA	NA	NA	NA	17.43%
AAA Couture	AlfAccurate Advisors	-8.13%	1.97%	20.72%	32.31%	18.16%	24.39%	NA	NA	22.08%
Lifesciences and Specialty Opportunities	Valcreate Investment Managers	-0.76%	5.83%	16.58%	27.37%	8.16%	20.79%	NA	NA	18.24%
BB Money Plant	Bharat Bhushan Equity Traders Limited	-10.06%	4.18%	18.26%	25.87%	NA	NA	NA	NA	31.14%
Ameya Fund	Wallfort Fund Management	-5.67%	7.71%	27.47%	24.24%	7.69%	23.65%	NA	NA	36.89%
Momentum 20 PMS Fund	Atlas Integrated Finance Limited	-11.29%	6.86%	19.79%	24.16%	1.10%	NA	NA	NA	0.61%
Prudence	Solidarity Advisors	-8.64%	0.81%	18.26%	24.05%	15.39%	17.06%	10.76%	17.04%	17.49%
The Opportunistic	JM Financial Limited	-1.31%	4.17%	13.05%	22.56%	11.69%	27.59%	17.55%	NA	9.90%

■ Bold column = ranking basis (1y)

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PMS Performance

Top 10 PMS Strategies — Ranked by 3-Year Returns

Performance snapshot across 1-month to since-inception horizons

Scheme Name	PMS Provider Name	1m	3m	6m	1y	2y	3y	5y	10y	SI
Core Fund	Stallion Asset Pvt Ltd	-4.36%	0.97%	13.71%	11.20%	8.57%	29.83%	22.89%	NA	27.26%
The Opportunistic	JM Financial Limited	-1.31%	4.17%	13.05%	22.56%	11.69%	27.59%	17.55%	NA	9.90%
Diversified Fund.	Wallfort Fund Management LLP	-5.53%	-3.66%	11.06%	-2.43%	4.24%	25.70%	25.68%	NA	22.44%
India Resurgent	JM Financial Limited	-0.28%	5.99%	19.66%	17.58%	12.60%	25.32%	17.02%	15.17%	14.17%
AAA Couture	AlfAccurate Advisors	-8.13%	1.97%	20.72%	32.31%	18.16%	24.39%	NA	NA	22.08%
Ameya Fund.	Wallfort Fund Management LLP	-5.67%	7.71%	27.47%	24.24%	7.69%	23.65%	NA	NA	36.89%
SISOP	Sundaram Alternate Assets Ltd	-3.96%	-5.56%	1.78%	13.00%	15.83%	23.20%	13.02%	14.95%	17.97%
Avenue Fund.	Wallfort Fund Management LLP	-4.15%	0.22%	7.14%	14.35%	13.16%	22.09%	NA	NA	24.28%
Long Term Capital Compounding Approach	Fortuna Asset Managers LLP	-5.88%	-0.51%	7.69%	4.05%	11.79%	21.99%	NA	NA	24.35%
Growth Fund	Green Lantern Capital LLP	-5.43%	-5.53%	-5.61%	3.12%	1.79%	21.83%	27.61%	NA	21.22%

■ Bold column = ranking basis (3y)

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PMS Performance

Top 10 PMS Strategies — Ranked by 5-Year Returns

Performance snapshot across 1-month to since-inception horizons

Scheme Name	PMS Provider Name	1m	3m	6m	1y	2y	3y	5y	10y	SI
India Opportunities Product	Aequitas Investment Consultancy	-4.49%	-4.42%	-9.59%	7.35%	18.25%	21.61%	29.22%	24.07%	30.74%
Growth Fund	Green Lantern Capital	-5.43%	-5.53%	-5.61%	3.12%	1.79%	21.83%	27.61%	NA	21.22%
Seeking Alpha	New Berry Capitals Private Limited	-6.11%	-0.71%	-3.60%	-1.66%	3.29%	15.11%	26.93%	NA	5.84%
Bespoke Strategy	Carnelian AMC	-4.41%	-2.38%	10.46%	7.59%	10.39%	21.56%	26.93%	NA	24.55%
Diversified Fund	Wallfort Fund Management	-5.53%	-3.66%	11.06%	-2.43%	4.24%	25.70%	25.97%	NA	22.44%
Diversified Long Term Value	Counter Cyclical Investments	-6.37%	-2.56%	10.20%	4.23%	0.76%	14.64%	25.68%	NA	42.64%
Core Fund	Stallion Asset	-4.36%	0.97%	13.71%	11.20%	8.57%	29.83%	22.89%	NA	27.26%
Dividend Yield Fund	Green Portfolio	-8.21%	-7.29%	0.09%	5.89%	8.79%	18.99%	22.44%	NA	27.53%
PMS Active Alpha Multicap	Samvitti Capital	-4.51%	3.36%	15.19%	12.00%	0.66%	16.38%	22.34%	NA	25.82%
Alpha Fund	Green Lantern Capital	-3.67%	-6.58%	-6.84%	2.76%	2.43%	18.91%	20.88%	NA	27.44%

■ Bold column = ranking basis (5y)

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PMS Performance

Top 10 PMS Strategies — Ranked by 10-Year Returns

Performance snapshot across 1-month to since-inception horizons

Scheme Name	PMS Provider Name	1m	3m	6m	1y	2y	3y	5y	10y	SI
India Opportunities Product	Aequitas Investment Consultancy	-4.49%	-4.42%	-9.59%	7.35%	18.25%	21.61%	29.22%	24.07%	30.74%
Long Horizon Fund	Equirus Wealth	-10.50%	-7.44%	11.57%	8.64%	1.22%	8.56%	8.28%	19.39%	19.26%
India Equity Fund	Sameeksha Capital	-5.88%	-9.09%	1.17%	-4.94%	0.19%	11.82%	13.59%	18.51%	19.29%
Opportunities	Buoyant Capital	-2.54%	-5.96%	-2.73%	-2.98%	5.73%	12.95%	14.44%	18.42%	19.50%
Long Term Value Fund	2Point2 Capital	-6.10%	-11.40%	-7.50%	-9.70%	2.30%	9.00%	12.30%	17.80%	17.20%
Rising Star Opportunity	Valentis Advisors	-5.11%	1.50%	7.97%	12.05%	0.13%	11.44%	13.14%	17.26%	17.03%
Prudence	Solidarity Advisors	-8.64%	0.81%	18.26%	24.05%	15.39%	17.06%	10.76%	17.04%	17.49%
Platinum	Valuequest Investment Advisors	-6.01%	-6.59%	3.05%	0.47%	-2.52%	9.14%	13.27%	16.61%	17.62%
Picopower	Accuracap	-4.44%	-3.25%	5.15%	4.74%	0.65%	13.70%	12.97%	16.17%	21.29%
Master Trust India Growth Strategy	Master Portfolio	-6.67%	-2.48%	3.43%	-0.76%	2.39%	11.11%	11.08%	16.07%	23.35%

■ Bold column = ranking basis (10y)

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