

## 10 MOST PROMISING PORTFOLIO MANAGEMENT - 2021

Management	Company	Description
<b>Valentis Advisors</b> Mumbai valentisadvisors.com	Jyotivardhan Jaipuria, Founder	SEBI licensed Portfolio Management Services (PMS) provider offering both discretionary and non-discretionary PMS services, and stock advisory services
<b>Sameer Capital,</b> Noida sameercapital.com	Sameer Tyagi, Founder	Specializes in Equities, Mutual Funds & SIP, Commodities, Demat/Trading Account, Banking Investment
<b>Joindre Portfolio Management</b> Mumbai joindrepm.com	V Jayaram, CIO & Fund Manager	Offers discretionary and advisory Portfolio Management Services (PMS) to HNIs, Corporates, NRIs, family offices and more
<b>Impetus Arthasutra</b> Mumbai impetusindia.in	P.R. Dilip, Founder	Known for its craftsmanship in designing investor-specific investment portfolios with precision and quality
<b>AlfAccurate Advisors</b> Mumbai alfaccurate.com	Rajesh Kothari, Founder	Uses a disciplined, fundamental, research-driven approach to identify well managed, shareholder-friendly companies with sound business models with a strong likelihood of profitability and positive shareholder returns
<b>Shepherd's</b> Pune shepherdshill.in	Rishi Gupta, Managing Partner	Offers investors in India and around the world a way of achieving superior long-term returns on their savings
<b>Bonanza Portfolio</b> Mumbai bonanzaonline.com	Atul Parakh, CEO	Specializes in the areas of Online Trading, Fixed Income, Investment Banking and Insurance
<b>Motilal Oswal Financial Services</b> Mumbai motilaloswal.com	Aashish P. Somaiyaa, CEO	Offering a wide range of financial services to both businesses and individuals
<b>Kotak PMS</b> Mumbai kotakpms.com	Anshul Saigal, Head & Portfolio Manager	Enabling customers to have an efficient investment options through its suite of services
<b>Alchemy Capital</b> Mumbai alchemycapital.com	Viren Ved, Co-Founder & Director	India's leading asset management company that offers the best portfolio management services

# Valentis Advisors : Generating Wealth Through Deep Fundamental Research on Undervalued Stocks



**Jyotivardhan Jaipuria,**  
**Founder**

**I**n the stock exchange, prices of stocks are determined when seller supply meets buyer demands. However, there are innumerable factors that ultimately drive the stock markets and stock price. It could be the history of a company's earning, growth, and return ratios, the prevailing industry trends, the global indicators, amongst several others. Therefore, amidst such market noise, selecting the right stock for aspiring investors that would generate a healthy return turns out to be a tricky choice. In-depth research on all the market parameters turns out to be essential in such a situation. Thankfully, Mumbai-based Valentis Advisors does precisely that through its total commitment and focus towards long-term fundamental research on the various market parameters.

Valentis Advisors was founded by Jyotivardhan Jaipuria, a stalwart in the Indian capital market with an overall experience of over 35 years, which includes 21 years at DSP Merrill Lynch, where Jyotivardhan was Head of Research and strategist for India at Bank of America Merrill Lynch. Jyotivardhan has also served as a member of the Board of Directors of DSP Merrill Lynch, the Asia Pacific Research Executive Committee and Operating Committee, the India Country Leadership Team (CLT), and various other management committees.

Through Valentis Advisors, Jyotivardhan channels his vast, in-depth knowledge as one of India's top strategist advisors on institutional investments. Together with a team of veteran market analysts and fund advisors, Jyoti and co deliver a unique investment philosophy. The team of experts at Valentis follows the 3'US" philosophy - looking at undervalued, under-owned, and undiscovered stocks having great

potential in the long run. Valentis Advisors have a knack for going out of the non-consensus route by looking beyond just the flavor of the season, whether the markets are acting 'bullish' or 'bearish.' Valentis Advisors looks at the global macro effects on stocks very closely, which is most often ignored or the last thing on the mind for most of the investors. And, the most reassuring feature of the PMS is that the Founders put their own 'skin in the game' alongside its valued investors.

## Sound Investments Based on a Quasi Private Equity Approach

At Valentis Advisors, clients are guided towards a buy-and-hold strategy. Just like private equity investors, the team at Valentis buys stocks and holds them for more than three to four years through a staggered investment approach that brings out the best value for its investors. The approach Valentis Advisors take resonates with what former American Billionaire investor Charlie Munger said years ago - "The big money is not in the buying and the selling, but in the waiting."

At the moment, Valentis Advisors caters to domestic investors who are high networth individuals. In the PMS sector, one can only do more than 50 lakh worth of investments. The next thing on the company's plate is to cater to international investors as well. There are a lot of pension funds and institutional funds outside of India, which Valentis has access to. The idea is to cater to a different segment from the HNI investors the company is currently doing in India.



## Valentis Advisors have a knack for going out of the non-consensus route by looking beyond just the flavor of the season

The proof of the pudding is in the eating. The Valentis approach has worked wonders for investors. In the 5 years since the flagship Valentis Rising Stars Opportunity Fund started, investors have seen their money increase a staggering 2.5 times giving a compounded return of over 21% one of the best in the country. Fund managers are evaluated on the alpha (return over the index) and here Valentis with a 1000 bps stands well over its peer group.





## **siliconindia** 10 MOST PROMISING PORTFOLIO MANAGEMENT SERVICE PROVIDERS - 2021

**S**electing right investment policy could be a cumbersome task for any individual who are from outside the financial sector. Making profits from stocks, shares, mutual funds, bonds and others may not be an easy task for layman, especially when they have too little time to dedicate to observe and predict fluctuations of stock market and mutual funds. Portfolio managers help to find the best investment for an individual based on his or her income and budget such that one could get maximum return at minimum risk. Portfolio managers understand the client's financial needs and suggest the best and unique investment policy for them with minimum risks involved.

There are mainly four types of portfolio management. They are active portfolio management, passive portfolio management, discretionary portfolio management services and non-discretionary portfolio management services. The asset management business under private sector took root in India in the year 1993 under Security Exchange Board of India (SEBI). At present, there are 28 mutual funds in India offering different schemes tailored to meet investors' growth, safety and income requirements. Today assets contribute to sic

percent of India's GDP.

At the beginning portfolio services were popular investment route for only wealthy man, but today even layman is investing in portfolios due to the ease of doing things through mobile apps and other modern methods. The mutual funds started to launch schemes starting from even Rs. 500, so that it could be more inclusive to all economic profiles of society. Good education and ability to understand financial matters have also increased the number of people investing in portfolios. For those who find difficult to take a proper decision in investing money, portfolio managers will provide tailor-made solutions for them.

Understanding the ample opportunities in this sector, this issue of Silicon India magazine brings you a list of '10 Most Promising Portfolio Management Service Providers - 2021'. These platforms were selected by comprehensive examination by industry CEOs, VCs, CXOs and our editorial board. We truly expect these institutions to meet your needs as we recognize their valuable contribution to the ever expanding and competitive market and their ability to sustain themselves and emerge as top contestants through their reliable services.