

ANANDRATHI
INVESTMENT SERVICES

OVER
25
YEARS OF
SERVICE

ONE STOP SOLUTION FOR ALL YOUR INVESTMENT NEEDS



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About us:

Anand Rathi Group is a reputed financial services conglomerate in India. We have 25+ years of research. Our services include Investment services across multiple asset classes, Wealth Management, NBFC, Insurance Broking, Institutional Equities & Investment Banking. We have been awarded Best Equity Advisor, Best Insurance Broker of the Year and Fastest Growing Wealth Management organisation of the year at ET NOW Presents World BFSI Congress & Awards 2020.

4+ Lakh
Customers

370+
Locations



Investment Products



Focused Equity Products

**VALUE
PICK**

ITF: 12 Months

INTELLECT
IDEAS

ITF: 12 Months

**PAIR TRADE
STRATEGY**

ITF: 1 Month

SHORT TERM
TECHNICAL TRADING

ITF: 3-15 Days

**STOCK
OPTIONS**

ITF: 3-15 Days

MOMENTUM BUY

ITF: 3-15 Days

**POWER
PICK**

ITF: T+5 Days

**PICK FOR
THE
MONTH**

ITF: 1 Month

T20

ITF: 1 Month

STOCK
MOVERS

ITF: 1-3 Months

**ETF
IDEAS**

ITF: 1-3 Months

INVESTMENT
 baskets

Short / Medium /
Long term

ITF = Investment Time Frame



Investment Baskets*



Investment Baskets are a Portfolio of Stocks with the blend of the Thematic Equities. Each basket differs in its Philosophy, Goals & Offerings & Stock Picking is done with high quality Fundamental & Tactical Strategies with Ideal Asset Allocation, a perfect blend of Large-Caps & Mid-Caps Stocks.

Types of Investment Baskets

Technical Baskets

Technical baskets are momentum & theme based investment baskets with medium to short term Investment horizon

Stocks are screened on the basis of technical & derivative parameters, considering overall market momentum

Quality stocks are picked by our technical research team & its been reviewed & rebalanced periodically

Investment time frame of upto 15 days - 6 months

Fundamental Baskets

Fundamental baskets are theme based investment baskets with medium to long term investment horizon

Stocks are screened on the basis of growth, quality of business, past performance, management strength

Quality stocks are picked by our research team & its been reviewed & rebalanced periodically

Investment time frame of upto 1-3 years

Features of our Investment Baskets



Dynamic Research Based Stock Allocation



Power of Discretion



No Lock-in period



Single click to invest



Periodic review



Live Performance tracking



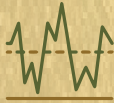
Fixed Income Instruments*

A fixed-income instrument is a debt instrument issued by a government, corporation or other entity to finance and expand their operations. Fixed-income instruments provide investors a return in the form of fixed periodic payments and eventual return of principal at maturity.

Key Benefits



Lower risk
v/s Equity



Lower volatility
v/s Equity



Stable
Return



Capital
Protection#



Diversification
across asset
classes

Fixed Income Instruments we offer



Corporate
Fixed Deposits



Market Linked
Debentures



Debt Mutual
Funds



Debt Alternative
Investment
Funds



Tax Free
Bonds



Corporate
Bonds



Capital Gain
Bonds



Sovereign
Gold Bonds

*Fixed income instruments carry credit risk



Portfolio Management Services*

PMS is a financial service provided to the clients by the fund manager where the fund manager designs a product that caters to the investment objectives and needs of the clients. The fund manager designs products on different categories of investors and their investment goals.

Key Benefits



Dedicated RM to advise and guide you



Periodic updates to review your investment portfolio



Diversified strategy to churn out maximum yield from your investments



Easy access to Fund Manager

Our Offerings

MNC
PORTFOLIO



Focus is on consistent return and risk moderation by investing in Multinational Companies listed in India.

IMPRESS
PORTFOLIO



Focus is on optimizing returns by investing in multi-cap portfolio of rising enterprises with a sound corporate track record and sustainable business model keeping a balance between value and growth strategy.

DECENNIUM
OPPORTUNITY



The objective is to focus on return optimization by investing in multicap portfolio of companies with good corporate governance, strong emerging business or companies entering into next business upcycle.

Performance

PMS	6 M	1 Year	2 Years	3 Years	Since Inception	Inception Date
MNC Portfolio	13.10%	8.45%	25.23%	22.91%	13.93%	(28th March, 2018)
NIFTY MNC INDEX	7.70%	5.62%	19.57%	16.94%	8.51%	
Impress Portfolio	6.80%	5.66%	32.99%	30.10%	11.34%	31st May 2017
NIFTY 500 INDEX	7.10%	5.28%	27.87%	19.51%	12.30%	
Decennium Opportunity	4.77%	9.80%	13.06%	NA	3.39%	(12th Nov, 2021)
NIFTY 500 INDEX	4.50%	8.54%	7.11%	NA	-0.56%	

Disclaimer: Returns above one year are annualized. Returns shown are after fees and expenses. Past Performance is not necessarily indicative of likely future performance. Performance mentioned above are not verified by SEBI. We have shown the performance as Aggregate performance of all clients on TWRR basis.

Note: Returns as on 31st Aug' 22.

Such representations are not indicative of future results

Premium Subscription Services



Value Added Scheme (VAS)

VAS is a new and innovative scheme that is a win-win for us as well as clients. We win because we get fixed brokerage as subscription and clients win as they benefit from lower brokerage.



Exclusive access to our Telegram Channel



Exclusive access to every Research report that we publish



Exclusive Call & Trade Facility



Free One time Portfolio Evaluation Service



Stock Lab

Stock Lab is a subscription-based comprehensive evaluation and analysis tool that helps you evaluate your current holdings and highlights the nonperforming stocks in your portfolio.

Advantages of Stock Lab



Periodic
Review



Helps you
eliminate poor
performing stocks



Extensive
Analysis



Seamless
Execution

Funding Services

Loan Against Securities (LAS)*

With LAS investors could consider putting their securities in the capital market to use. Instead of monetizing investments in securities, the client can opt for LAS and leverage their investments. LAS is a secured lending product offered by our NBFC company - Anand Rathi Global Finance Limited - Registration No. B-13.01682.



Attractive
Interest
Rates



Optimum
Interest is
Charged



Acts as an
Overdraft
Facility



Enjoy
Dividends and
Other Benefits



Get Loans
upto 50%
of share value

Securities Lending and Borrowing Mechanism

Securities Lending and Borrowing Mechanism (SLBM) is a way through which investors can borrow or lend shares to other market participants. The platform provides a viable alternative to the derivatives market for purposes of hedging. All the borrowing and lending are Cleared, Settled & Guaranteed.

Benefits of Securities Lending and Borrowing Mechanism



Additional
Income



Enables
Short Sell



No Counter
Party Risk



No Physical
Settlement

Margin Trading Facility (MTF)#

Margin trading is a facility under which investor is allowed to buy stocks by paying a marginal amount of the actual value of shares. This margin can be paid either in cash or in shares as security. It is considered as leveraging positions where stock Brokers funds balance amount. Investors get opportunity to invest more than they could by using their own money and increase the potential returns.



Increases
Investment
Capacity



Additional
Exposure on
Investment



Easy
Online
Activation



Optimum
Interest is
charged



Enjoy
Dividends and
Other Benefits



Mutual Funds*

Mutual Fund is an investment pool wherein money is collected from various investors to make a pooled investment in various asset classes like equity stocks, bonds, money market instruments, commodities, etc. This enables retail investors to participate in the market in smaller denominations with the benefits of diversification.

Types of Mutual Funds



Equity Mutual Fund

These are funds that invest in the Equity market basis the objective of the fund. The primary objective of these funds is wealth creation or capital appreciation. Equity mutual funds can be categorized basis capitalization, themes, etc. namely Large Cap Fund, Mid Cap Fund, Small Cap Fund, Multi Cap Fund, Sectoral Fund, Thematic Fund, etc.



Debt Mutual Fund

These are funds that invest in fixed income instruments basis the investment tenor and credit risk objective of the fund. These funds are supposed to be lesser volatile than equity mutual funds. Fixed Income Securities like the government securities, Commercial Papers, Treasury Bills, corporate bonds, are usually available in larger multiples of 10 lakhs, however a debt mutual fund allows investors to participate in smaller denominations. The primary objective of these fund is income generation. Debt mutual funds are categorized basis the investment duration and risk, namely, Liquid Fund, Medium Term Funds, Floating Rate Fund, Credit Risk Fund, etc.



Hybrid Mutual Fund

These are funds that invest in both equity as well as debt, thereby catering to both income and wealth generation. The allocation to the asset class is basis the fund manager's outlook, however hybrid funds can also be classified basis the objective i.e. an Equity Oriented Hybrid Fund, Debt Oriented Hybrid Fund.

Ways of investing in Mutual Funds

Systematic Investment Plan (SIP)

A systematic investment plan allows the investor to invest a fixed amount in the selected Mutual Fund periodically, usually monthly on a specific date selected as per their convenience.

Benefits of investing via SIP



Rupee Cost Averaging

Consistently investing in Mutual Fund through SIP helps to average out the price at which we invest. The investor doesn't have to worry about entering the market at the correct time or at its low.



Convenience and Discipline

The SIP is automatically debited from the investor's account on the predetermined date, this approach of regular investments allows the investor a lot of convenience and discipline without having to actively track the market.



Power of Compounding

Investing in small denomination over a long period of time results into earning returns over your returns. Initially this compounding may look small but over a period of time it makes a huge difference.



Low Initial Investment

Investment in Mutual Fund through SIP enables an investor to invest in denominations as low as Rs 500.

Lumpsum Investment

This is a method of investment in which you invest a single sum of money in a Mutual Fund in one go.

Benefits of investing via Lumpsum



Beneficial for Long Term

Lumpsum investment in Mutual Fund should be made if the investment is for long term.



Market Timing

In addition to a regular SIP, if an investors could benefit from investing a lump sum amount on market dips, however it is difficult to time the market.



Commodities

Commodity derivatives are investment tools that allow investors to profit from certain commodities without possessing them. The buyer of a derivatives contract buys the right to exchange a commodity for a certain price at a future date. The buyer may be buying or selling the commodity.

Advantages of Investing in Commodity Markets:



Lower Margin

The margin can be close to 5-10% of the total value of the contract. This is much lower than the margin required for other asset classes.



Liquidity

Unlike investment in assets like real estate, investment in commodity futures offers high liquidity. It is easy to buy and sell commodity futures. An investor can liquidate his position whenever required.



High returns

Thus, the investor can take larger positions while investing lesser amounts of capital. This also helps increase the potential for higher profits.



Protection against inflation

As the demand for goods and services rise, it leads to an increase in the price of the goods and services as the cost of the raw materials i.e. commodity increases.



Diversification

Commodities have negative or low correlation with stocks. Hence, due to this negative correlation where an increase in the price of commodities drives the stock prices down, the losses incurred in stocks can be adjusted against the gains attained by commodity derivatives.



Currencies

Currency derivatives are contracts that derive their value from their underlying asset, the currency. Currency derivatives help protect against price volatility of the underlying asset in the future and are widely used by traders as a risk management financial instrument.

Benefits of Currency Derivatives



Hedging

The primary reason why people enter into an agreement is hedging. For the uninitiated, hedging is a risk management instrument against any undesirable fluctuations in currency rates in the future.



Highly Liquid

The most liquid market in the world is said to be the foreign exchange market. Traders have the ability to enter and exit the market whenever they want without worrying about the market conditions. This is due to the availability of numerous traders and buyers.



No Manipulation

Due to the giant size of the market and numerous players involved, it's impossible to manipulate the market. Forget a single entity, even centralized banks with their high-volume of transactions can't make any favored altercations.



Fixed Lot Size

A lot size means the number of currency units per lot. The biggest advantage to this is that traders who participate in these contracts can trade multiple lots per contract.



Low Margin

You can just pay 2-3% of the value while trading currency derivatives instead of the full traded value. The percentage value is called the margin amount.



TradeMobi App

Our **TradeMobi App** helps you to
Invest in **Equities & Derivatives**
with utmost ease and convenience



Features of TradeMobi App



Live Portfolio
Tracking and Control



Real-time Quote,
Charts and Analytics



Secured Two Factor
Authenticated Login



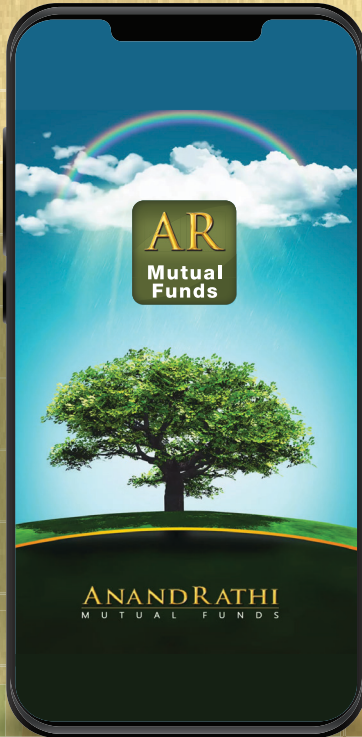
Easy, Quick and
Stable User Interface

Available on





Mutual Funds App



Our **MF App** helps you to Invest in **Mutual Funds** with utmost ease and convenience



Dematless Mutual Fund Investments



4000+ Mutual Fund schemes



Mutual Fund investments in just 15 Minutes



Paperless Mutual Fund investments



Invest in Mutual Fund Baskets

Available on



AWARDS & ACCOLADES

**Best Equity
Advisors** (Analyst)

World BFSI Congress
and Awards' 22

Anand Rathi
Advisors Ltd.
Best Equity Advisor

ET Now World BFSI
Congress Awards' 20

**CEO of the year
Roop Bhootra**

World BFSI Congress
and Awards' 20

**BFSI Digital
Innovation
Award for**

Analytics / Data

**Best BFSI
Brand 2022**

The Economic Times

**Great Place
To Work**

Feb 2022 - 2023

Great Place To Work
Institute (India)



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Regd. Office: Express Zone, 10th Floor, A Wing, Western Express Highway, Goregaon (E), Mumbai - 400 063, Maharashtra. Tel: (022) 6281 7000. Registration No.: INZ000170832 (BSE-949 | NSE-06769 | MSEI-1014 | MCX-56185 | NCDEX-1252), Research Analyst - INH000000834, Depository Participant: CDSL & NSDL- (IN-DP-437-2019) | AMFI Registered Mutual Fund Distributor, ARN-4478 is Registered under "Anand Rathi Share & Stock Brokers Ltd." Mutual Fund investments are subject to market risks, read all scheme related documents carefully before Investing. | PMS: INP000000282 is Registered under "Anand Rathi Advisors Limited" | SEBI INV. ADV. - INA000000268 is Registered under "Anand Rathi Advisors Limited." LAS is a secured lending product offered by our NBFC company - Anand Rathi Global Finance Limited.*These are not Exchange traded product and "ARSSBL" is just acting as distributor. All disputes with respect to the distribution activity, would not have access to Exchange investor redressal forum or Arbitration mechanism. #MTF subject to the provisions of SEBI Cir. CIR/MRD/DP/54/2017 dt June 13, 2017 & terms and conditions mentioned in rights and obligations statement issued by the ARSSBL" **Disclaimer:** Investment in securities market are subject to market risks, read all the related documents carefully before investing.

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