Growthfiniti Conservative PMS Strategy

20% Equity 80% Debt Tax Efficient Portfolio, using MF Direct Schemes

Aims to outperform the market through expert fund manager selection and dynamic asset allocation.

SEBI PMS Reg No - INP000009418

OUR MISSION

Building & Enduring Financial Legacies

WHO WE ARE

INCEPTION

Founded in 2019, our mission is to empower individuals and companies with tailored financial solutions for long-term wealth and security.

TEAM

A focused and experienced team of 25+ individuals.

VALUES

Reliability, Simplicity, Consistency, Mentorship

CLIENTELE

Serving business owners, professionals, CXOs, and senior management of renowned corporates in India.

LEADERSHIP

Bhavesh Sanghvi is a seasoned leader with over 36 years of experience, 20 of which are in financial services, having served as Executive VP & Head Wealth Management at Aditya Birla Capital. With leadership roles at Modi Xerox, Canon India, and Baazee.com, and education from Columbia Business School (EPM, 2014-15) and NMIMS (1999-2002). He has excelled in driving turnaround strategies and building customer-centric organizations.

MILESTONES

NOV **2019**

Commenced Operations

MAR **2022**

127 Crores AUD**

MAR **2023**

Launched The Growthfiniti Efficient Frontier

APR **2025**

SEBI Registered PM

Nov **2025**

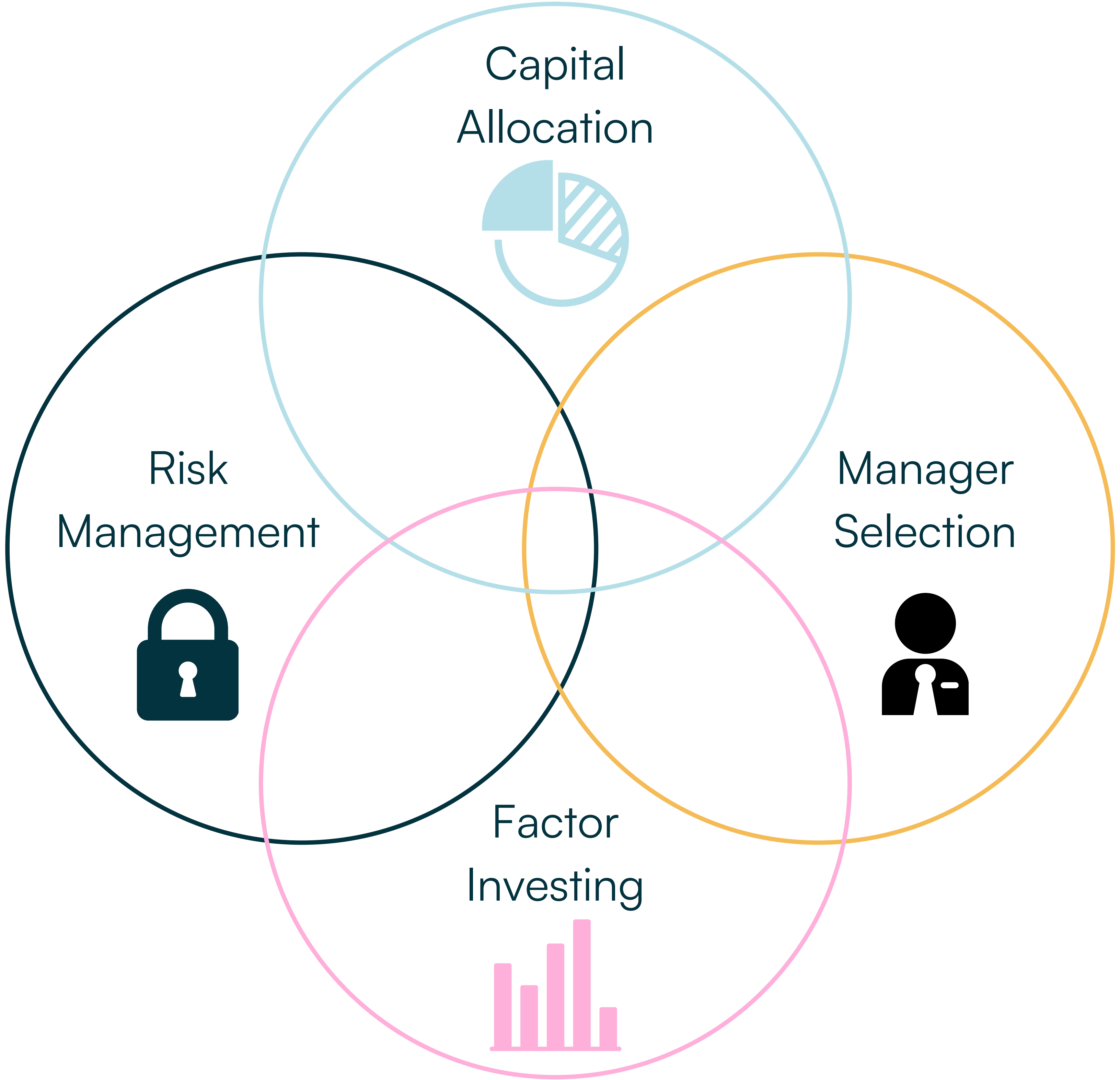
500+ Crores AUD**

****AUD stands for Assets Under Distribution.**

****AUD is the part of the wealth division.**

OUR CORE COMPETENCY

“Risk comes from not knowing what you're doing.” — Warren Buffett



THE EFFICIENT FRONTIER

The approach of Mean Variance Optimization is to maximize expected return for a given level of risk.

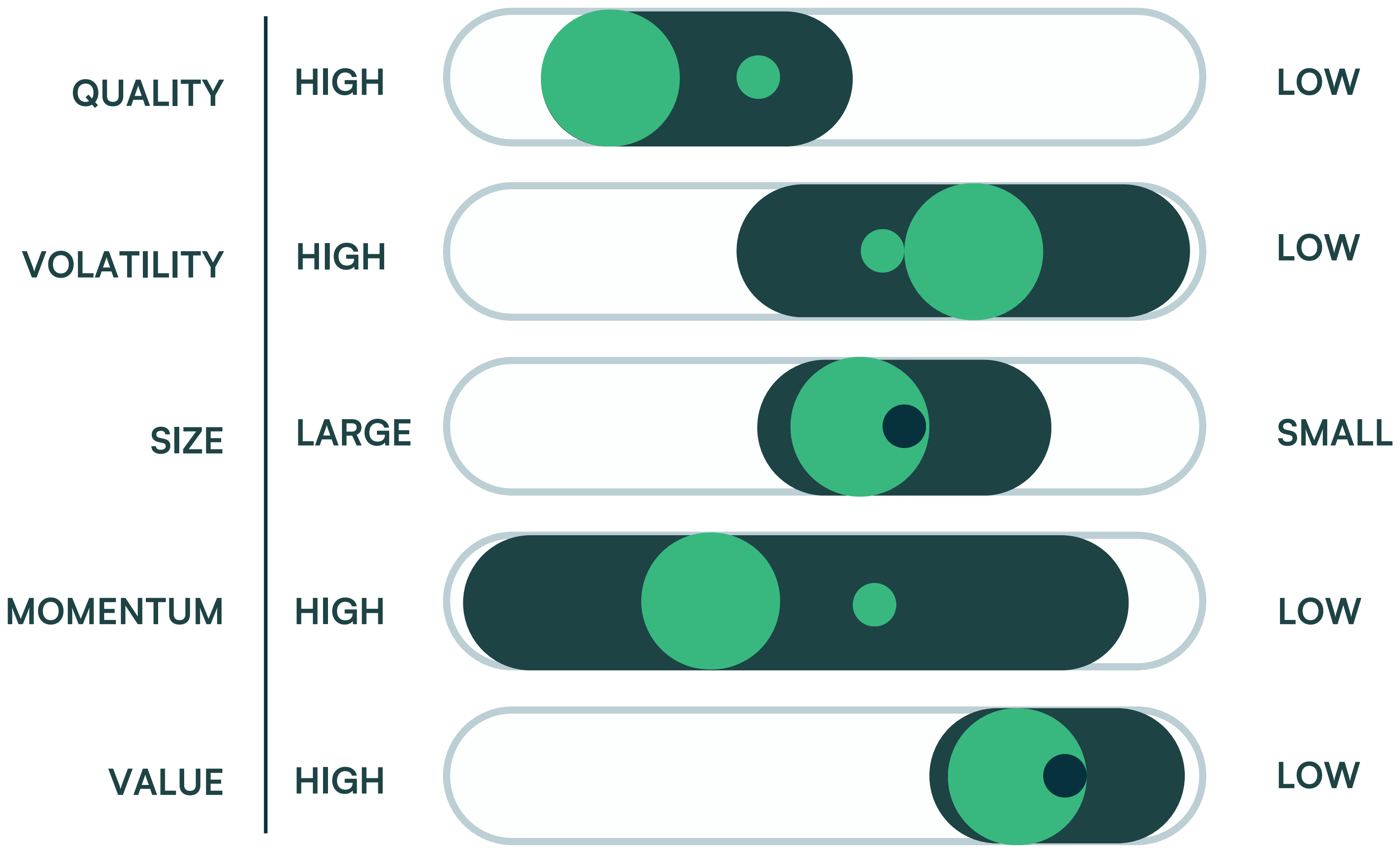
Modern Portfolio Theory suggests that an investment's risk and return should be assessed based on its impact on the overall portfolio.

CAPITAL ALLOCATION

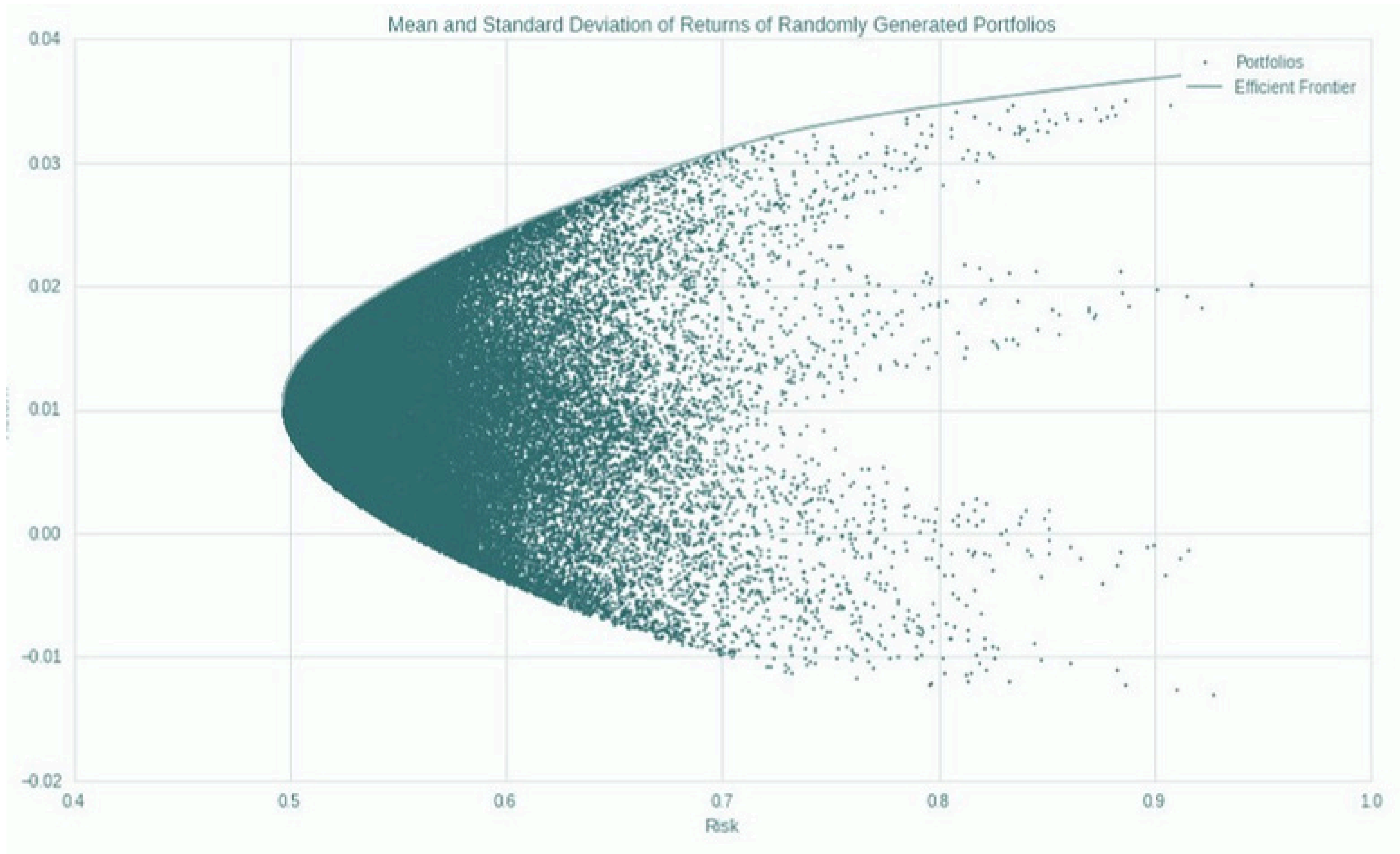
MANAGER SELECTION

- Customised scorecard assessing managers on quantitative parameters.
- Conduct on-site meetings & factor correlation analysis to further enhance the qualitative assessment.

	Fund A	Fund B	Fund C	Quality Index
Fund A	1			
Fund B	0.35	1		
Fund C	0.61	0.43	1	
Quality Index	0.76	0.56	0.62	1



CAPITAL ALLOCATION



Mean Variance Optimization
Black Litterman Model

- Utilise long-term historical data, projected forecasts, and specified constraints
- Optimize the weights assigned to each factor

PORTFOLIO CONSTRUCTION FRAMEWORK

Build the Efficient Frontier

Identify and plot optimal portfolios using asset returns, risk estimates, and correlations.

Quantitative Proprietary Ranking Model

Evaluate and rank investment funds based on performance, risk, and potential.

Qualitative Due Diligence

Combine qualitative insights with quantitative rankings for a holistic view of fund managers.

Manager Selection & Diversification

A selective & a continuous process to identify and chose managers across bespoke portfolios.

Continuous Monitoring & Adaptation

The Growthfiniti Efficient Frontier is monitored at regular intervals to align portfolios for incremental contributions.

FACTOR PERFORMANCE

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	YTD 2025	Return Annualized	Volatility	Cumulative Return
Quality	20%	40%	2%	1%	30%	9%	6%	26%	26%	-4%	32%	18%	1%	16.41%	14.30%	206%
Low Volatility	7%	37%	10%	3%	30%	7%	5%	24%	24%	2%	32%	12%	5%	16.04%	12.50%	199%
Value	-16%	75%	-9%	23%	42%	-29%	-16%	6%	52%	19%	63%	18%	3%	14.91%	33.50%	231%
Momentum	13%	50%	11%	10%	57%	-2%	11%	20%	54%	-5%	42%	21%	-8%	20.89%	21.80%	273%
Nifty 500	5%	39%	0%	5%	38%	-2%	9%	18%	32%	4%	27%	16%	3%	15.36%	14.70%	194%
Size (Midcap)	-1%	63%	10%	7%	56%	-13%	1%	26%	48%	4%	45%	24%	1%	20.17%	25.10%	269%
Dividend Yield	-5%	37%	-9%	13%	29%	1%	1%	16%	34%	5%	44%	19%	-5%	13.68%	17.50%	179%
Size (Smallcap)	-6%	72%	11%	1%	58%	-26%	-7%	26%	63%	-3%	49%	27%	-3%	17.96%	32.20%	263%

OUR TEAM

Bhavesh Sanghvi

Bhavesh Sanghvi is a seasoned leader with over 36 years of experience, 23 of which are in financial services, having served as Executive VP & Head Wealth Management at Aditya Birla Capital. With leadership roles at Modi Xerox, Canon India, and Baazee.com, and education from Columbia Business School (EPM, 2014-15) and NMIMS (1999-2002). He has excelled in driving turnaround strategies and building customer-centric organizations.

Aditya Padman, CFA

Aditya was part of a U.S.-based investment team managing ~$13 billion in discretionary mutual fund portfolios, working closely with institutions like BlackRock and Goldman Sachs. During this tenure, he conducted over 400 fund manager interviews, gaining deep qualitative insights into performance drivers and manager styles. His experience has been instrumental in building high-conviction, research-backed portfolios.

Talzeem Sansare
Research

Kanan Trivedi
Research

Grishma Shah
Compliance

Nilesh Mirgh
Dealing & Technicals

Raj Gala

Raj brings over 15 years of experience in Indian equity markets, advising wealth clients and family offices across PMS, ND-PMS, and direct equities. He was previously Fund Manager at Emkay Investment Managers and Senior Equity Analyst at Edelweiss Capital, where he led event-driven strategies across sectors. Raj is valued for his strategic insights and active portfolio management style.

Private Wealth to Global Indian Families

**Clients part of our wealth division

TRUSTED BY CXOs & SENIOR MANAGEMENT OF

ADITYA BIRLA CAPITAL
VPD CONSULTANTS PVT. LTD
RELIANCE NIPPON LIFE INSURANCE
SHOPPERS STOP
ONE Silverbullet
LEO9 STUDIO
DYNA CORP
Carlsberg
NAVIN FLUORINE INTERNATIONAL LIMITED
ICICI Lombard Nibhaye Vaade
MARATHON TRENDS
इंडियनऑयल IndianOil
Kokilaben Dhirubhai Ambani hospital & medical research institute Every Life Matters
Cipla Foundation
CSB Bank
BOEING
P. D. HINDUJA HOSPITAL & MEDICAL RESEARCH CENTRE
LEXUS
HDFC Life Sar utha ke jiyo!
ASK
omam Consultants Complete HR Solutions
IPS

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