

# Growthfiniti

## Secure

# PMS Strategy

40% Equity 60% 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.



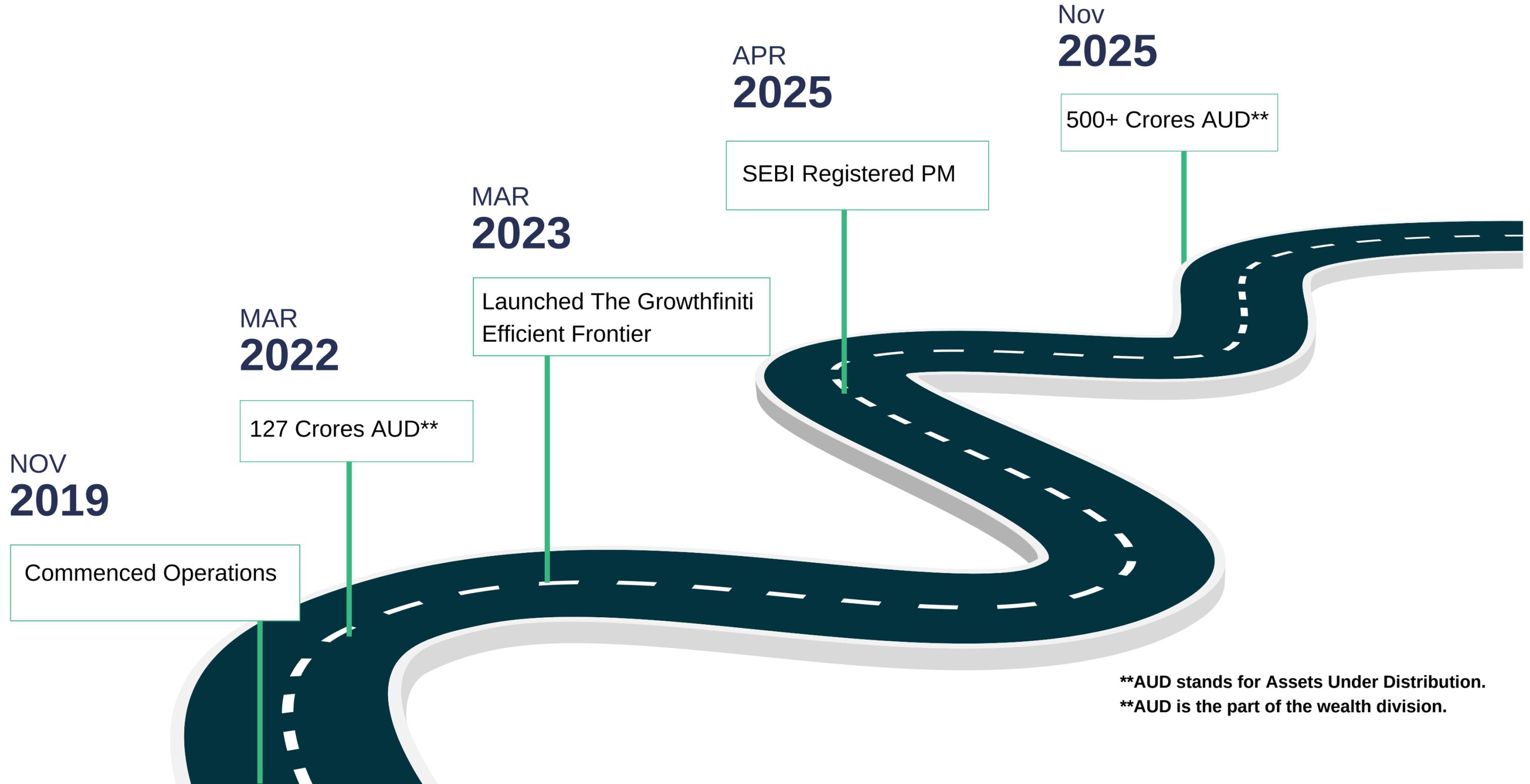
# LEADERSHIP



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

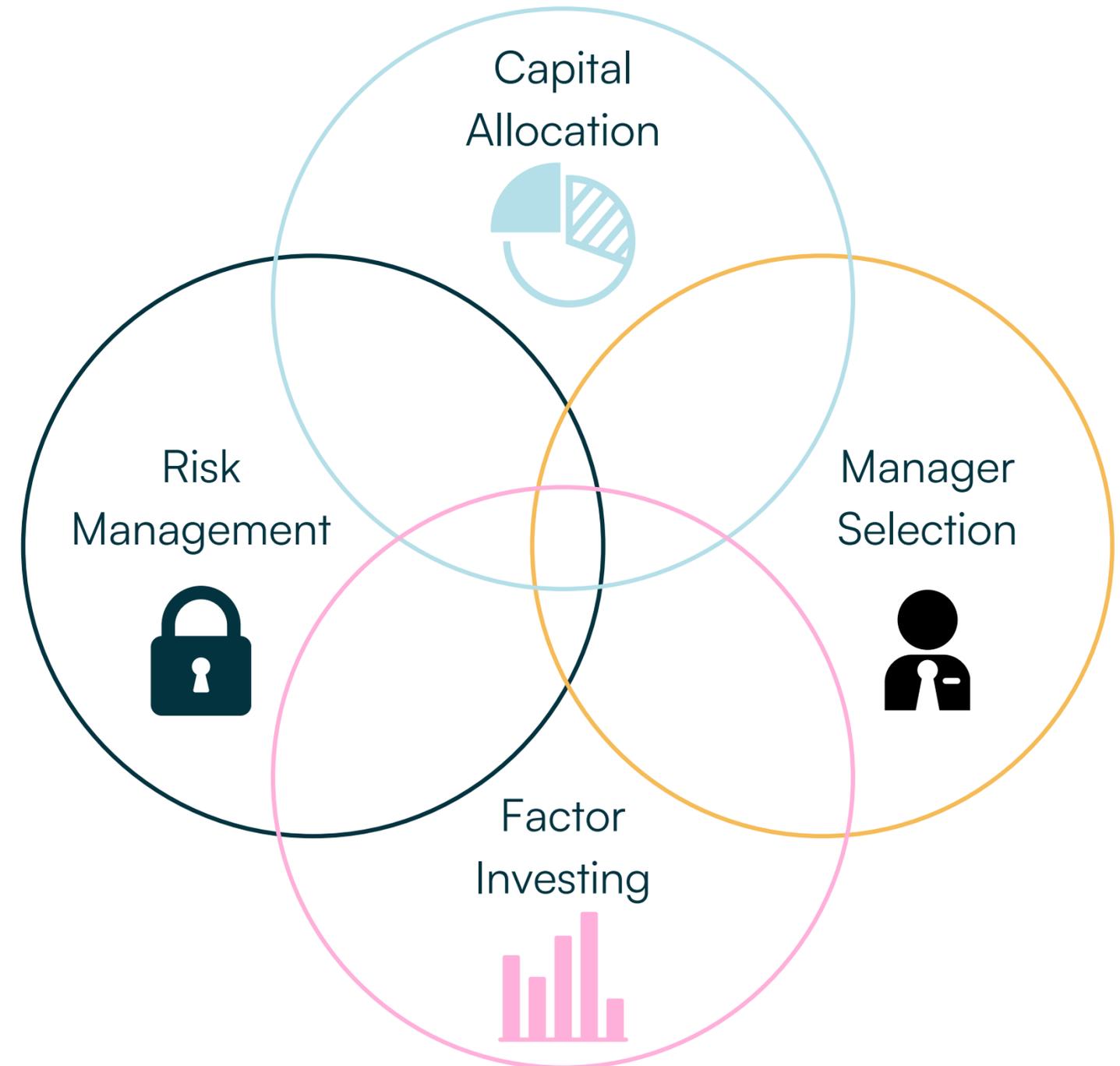


\*\*AUD stands for Assets Under Distribution.  
\*\*AUD is the part of the wealth division.



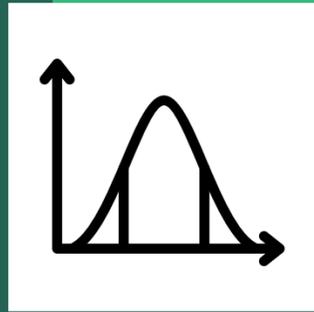
# OUR CORE COMPETENCY

**“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

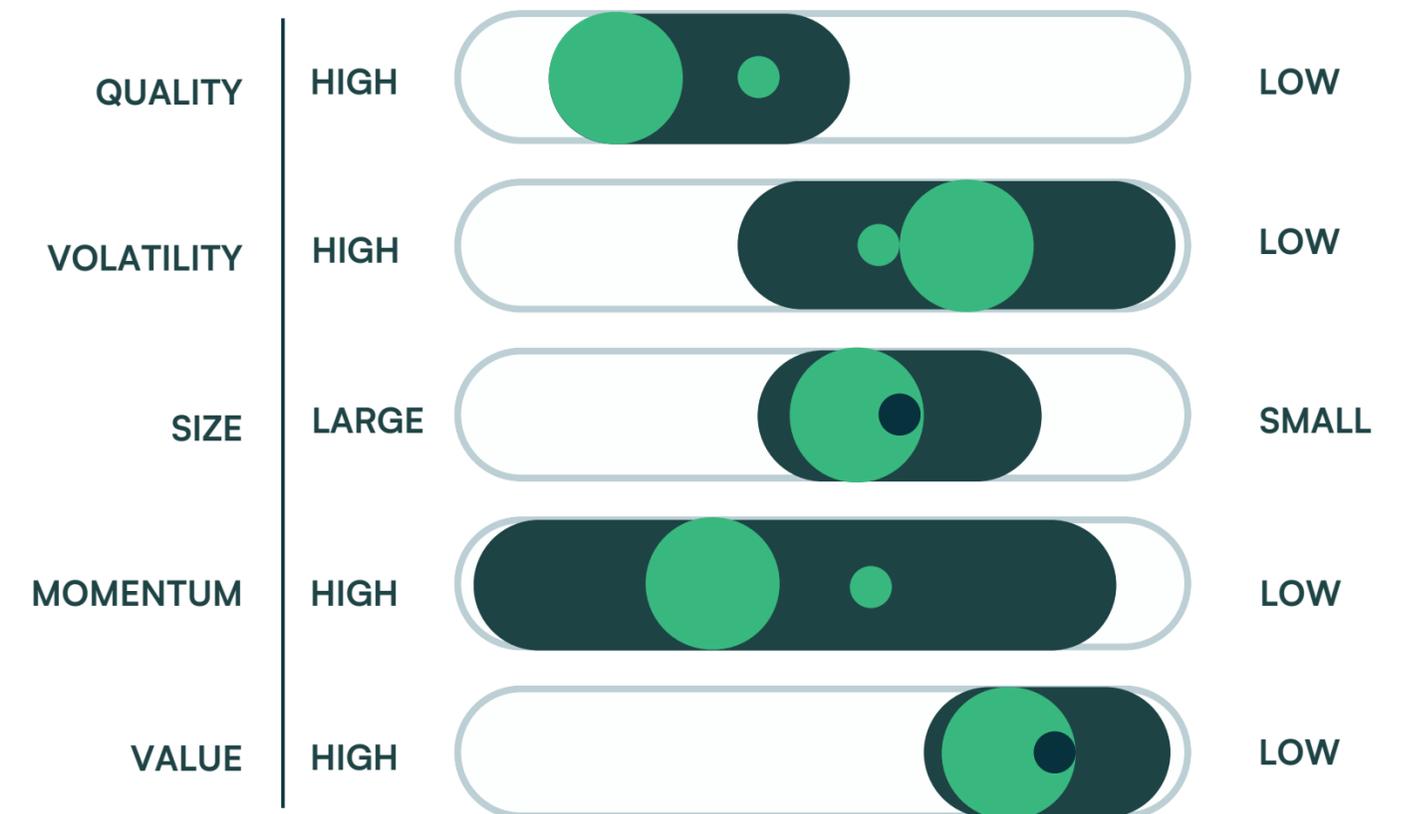




# MANAGER SELECTION

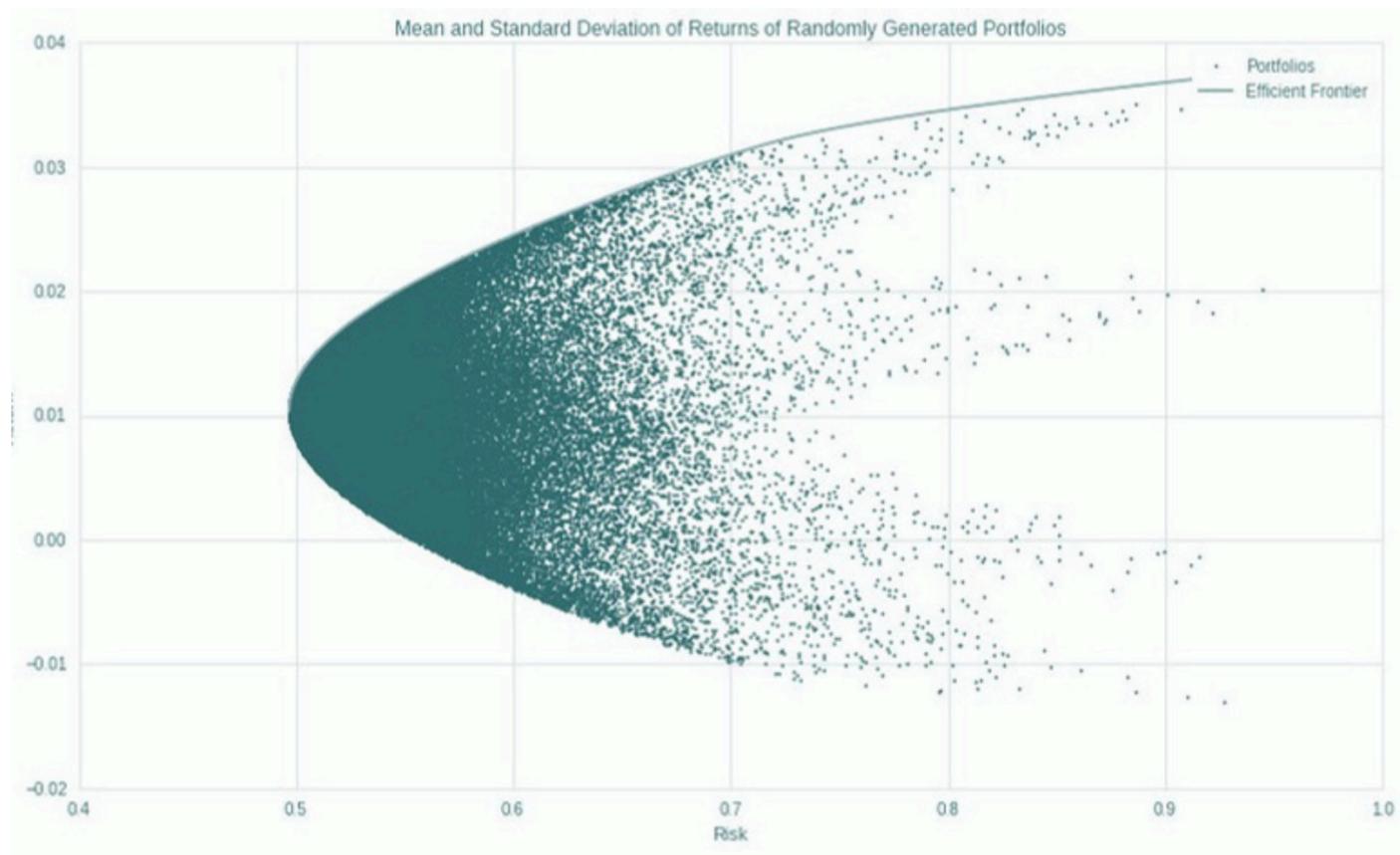
- Customised scorecard assessing managers on quantitative parameters.
- Conduct on-site meetings & factor correlation analysis to further enhance the qualitative assessment.

	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 choose 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

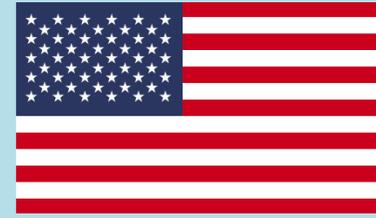


## Raj Gala

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.



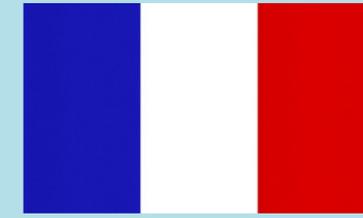
# Private Wealth to Global Indian Families



USA



GERMANY



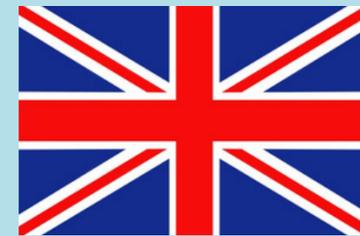
FRANCE



HUNGARY



SWEDEN



GREAT BRITAIN



IRELAND



AUSTRALIA



NEW ZEALAND



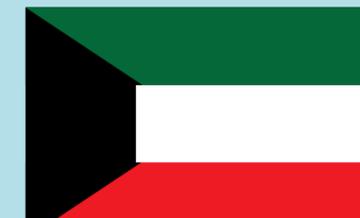
SINGAPORE



OMAN



UAE



KUWAIT



INDIA

\*\*Clients part of our wealth division



# TRUSTED BY CXOs & SENIOR MANAGEMENT OF





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# Thank You!

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