MAS Prime Scheme

MONEYLIFE ADVISORY

Product Offering: MAS Prime
- Investments in select blue chip stocks.
- Investment Horizon: 5 Years +
- Ideal for businesses looking to invest surplus cash or those keen on wealth preservation with appreciation
- Investment Horizon: 5 Years +

Investment Objective: To be the best in class (among the top 10 percentile) under downside risk, returns and portfolio volatility

Expected Return Drivers
- Security Selection
- Timing
- Allocation to Cash
- Hedging

Investment strategy
- A framework to identify high quality stocks.
- A framework to identify downside risk.
- An exit strategy for high quality stocks.
- Stay in cash when conditions dictate.
- Hedge the stock portfolio against sharp declines and hedge the cash position against sharp rallies.

Investment Process
Step1 – Market Filters: Filter companies by volatility and liquidity across three types of market capitalization -- mega, large and mid. We avoid micro-cap companies.
Step 2 – Stock Filters: Filter and rank these stocks as per growth, returns and valuation.
Step 3 – Stock Research: In-depth analysis of highest-ranked companies for their competitive position, corporate governance, growth drivers, valuation and price strength. This list is reviewed every quarter.
Portfolio construction: Exposure limits and asset allocation based on a combination of valuation and price strength.
Monitor & Exits: Exit on changes of fundamentals, valuation and price indications.

Operations & Reporting
- Investments managed on individual basis
- Third party custodian for funds and securities
- Monthly performance statement
- Transaction, holding & corporate action reports
- Annual CA certified statement of account
- Portfolio Valuation: Closing NSE market prices of the previous day
- Web access for portfolio tracking

Fees
- Management fee: 1% asset under management
- Performance fee: 20% above the hurdle rate of 10%
- No upfront fees
- No lock-in
- No Exit load

Next Steps
- Contact us through the website (Get in Touch button), or over phone / email as mentioned in the footer. We will send you an account opening pack.
- Go through the documents in detail and sign at all marked places
- Send us the signed documents back along with signed copies of PAN, permanent address proof and passport size photographs
- We will open the account within a week
- Send us funds / transfer the stocks
- We start managing your portfolio

Moneylife Advisory Services is the third entity of the Moneylife group, founded by Debashis Basu and Sucheta Dalal, starting with Moneylife personal magazine in 2006, to offer unbiased information and analysis on stocks, mutual funds, fixed income, insurance and other financial products.

Alarmed by poor investor awareness and rampant mis-selling of financial products, we launched Moneylife Foundation, a non-profit entity in 2010, to take up issues on behalf of savers, investors and citizens. In 2014, we launched Moneylife Advisory, a SEBI registered investment advisor, to advise retail investors on personal finance products.

Our objective and philosophy is to help consumers choose the rights products and grow their wealth. We have walked this talk for 13 years now, which is well-documented in our websites, social media and across the Internet. In September 2019, we got registered as PMS, with SEBI.

Moneylife Advisory Services Private Limited
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