



BADJATE WEALTH
CREATE **WEALTH** | NOT JUST **PROFITS**



PRESENTING

BADJATE MULTICAP FUND

DRIVEN BY RESEARCH, POWERED BY POTENTIAL

A SEBI-Registered Portfolio Management Service



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Badjate Wealth Pvt. Ltd., formerly known as Badjate Stock & Shares PMS, has been a pioneer in the field of financial services in Nagpur for over five decades. Founded by Prof. Sir Shantilal Badjate in the year 1964 with a mere 10-12 investors, the company has become the choice of more than 9,000 clients across the country. Currently, it is spearheaded by Mr. Anuj Badjate, who has been in the business for over 35 years now.



OUR MANAGEMENT



MR. ANUJ BADJATE
MANAGING DIRECTOR
& FUND MANAGER



MR. TUSHAR BADJATE
DIRECTOR &
COMPLIANCE OFFICER



MR. MANGESH NARNAWARE
VICE PRESIDENT OF RESEARCH
& ASSOCIATE FUND MANAGER



FUND VISION

At Badjate, capital protection of clients is of foremost importance. The Multicap Fund focuses to capitalize on opportunities throughout the listed space in Indian Equity Markets and maximize profits for its investors. The fund manager looks to get the right portfolio mix by pricing the market and not timing it. The key lies in portfolio diversification and the fund management team is committed on making the right diversification into small, mid and large cap companies. The fund offers two types of strategies; one for investors with moderate to high risk and the other for investors with low to medium risk profiles.



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MARKET OUTLOOK

April 2025 in USA has been characterized by economic policy shocks and stock market volatility, each reinforcing the other's effect. The Indian markets have also experienced notable volatility. The index rallied mid-month, closing above 24,100 on April 21, driven by strong earnings in the banking sector and foreign inflows. However, by month-end, Nifty faced resistance near 24,400, consolidating and ending flat at 24,334 amid profit booking and geopolitical tensions.

KEY HIGHLIGHTS INCLUDE:

Indices Performance: the Nifty 50 surged by 3.46%, while the Nifty Midcap 100 and Smallcap 100 indices surged by 4.75% and 2.19%, respectively, reflecting positivity.

Investor Activity: Foreign institutional investors (FIIs) recorded net equity inflows of Rs.2,436cr, reflecting renewed optimism in Indian equities, especially in sectors linked to global trade. DIIs maintained strong net equity inflows of Rs.3,161cr, supporting market resilience.

Tariff Escalations: On 2 April 2025, US President Donald J. Trump signed executive orders to impose tariff. After declaring higher tariffs based on the trade deficit, Trump has paused the tariffs and will impose a blanket 10 percent on all except China which is facing 145%.



OUTLOOK FOR APRIL 2025

May 2025 is expected to be a volatile period for the market due the geopolitical tension in India and Pakistan and the ongoing trade war of USA with China. The US market are expecting the inflation to go up due to the tariffs. India is at an advantageous state as the talk for Bilateral trade agreement are advancing fast. The good relations of the India and USA will be helpful to get the deal signed fast. It will certainly benefit the domestic producers.

Trade Agreements: Regular talks with USA and UK are taking place to conclude the Bilateral Trade Agreement. This will help India to capture the market and have a first mover advantage.

Pahalgam Attack: The barbaric attack in Kashmir has left the global community deeply unsettled. Markets are anxiously awaiting a response to the terrorists responsible. Additionally, there is growing uncertainty about the possibility of war between the two nations. India has stated that its actions are aimed at combating terrorism, rather than targeting any specific country.

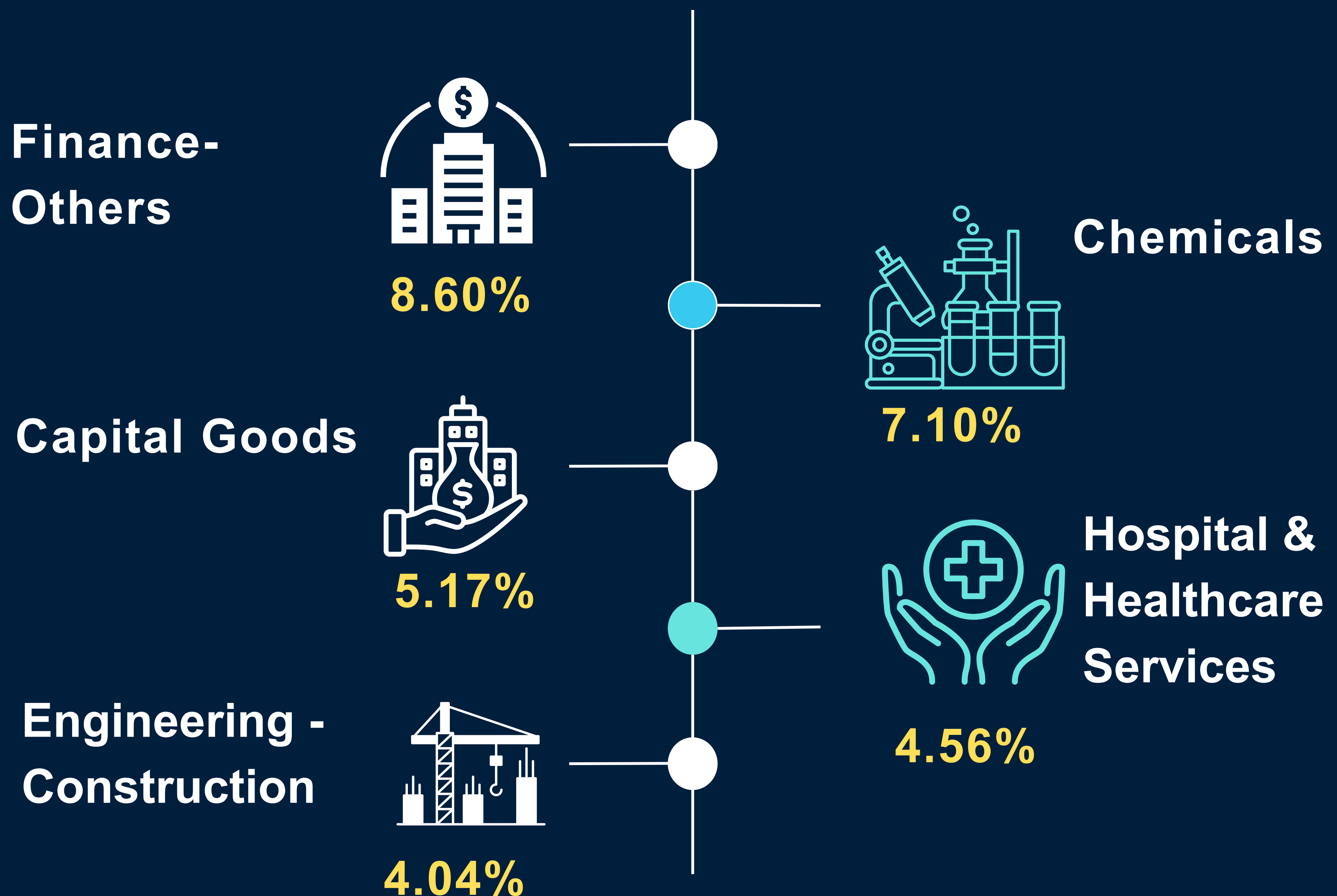


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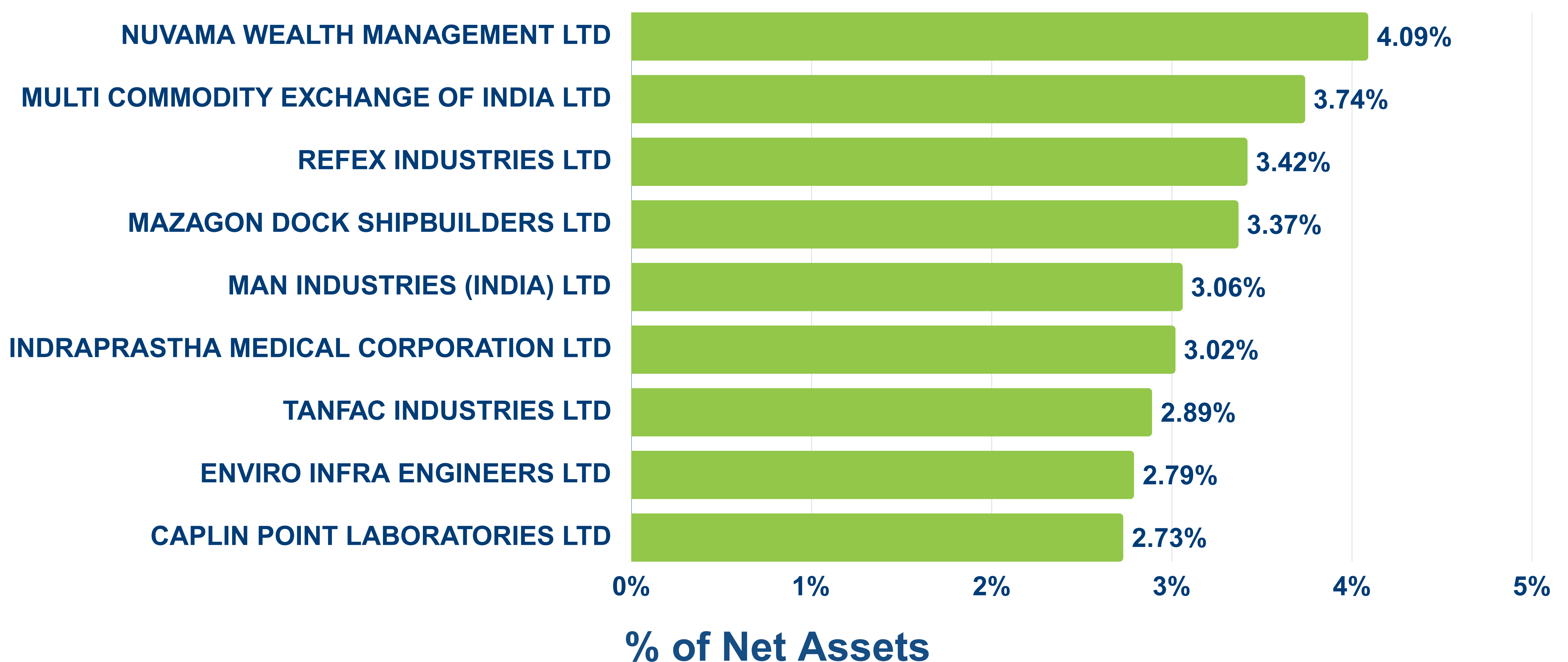
TOP 5 SECTOR ALLOCATION

These are the Top 5 sector allocations as on 30th April 2025



TOP 10 HOLDINGS

These are the Top 10 Holdings as on 30th April, 2025





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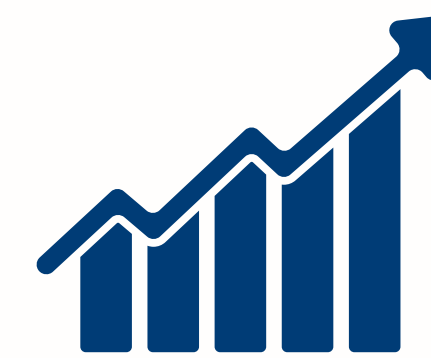
MULTICAP PMS STRATEGIES

CONSERVATIVE FUND



The fund aims to cushion investor's risk and generate decent returns at the same time. The fund manager seeks to invest into stocks which have a good dividend yield and have a stable growth prospect over the mid-long term horizon. The portfolio mix is weighed more towards large caps or value mid caps. The fund is suitable for an investor with a risk appetite ranging from low to moderate.

AGGRESSIVE FUND



The fund aims to generate higher alpha by investing into high beta stocks. The fund manager seeks to invest into stocks which are under-valued and have the capability of generating returns in the short-mid term horizon. The portfolio mix is weighed more towards the small and mid cap space and is suitable for an investor with a risk appetite ranging from moderate to high.



OUR MULTIBAGGER STOCKS

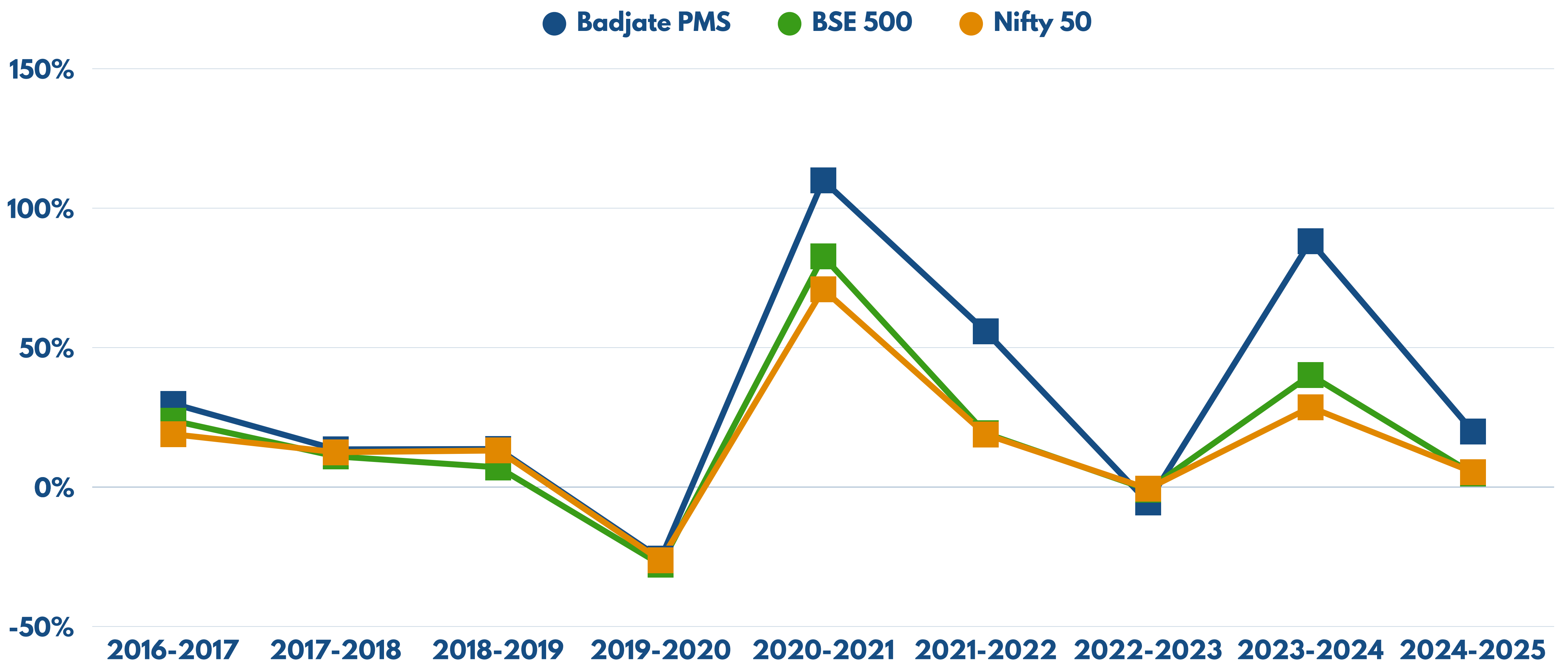
Stocks	Returns (%)	Year
Goldiam International Ltd	600%	2021-2022
Refex Industries Ltd	1475%	2021-2022
Shilchar Technologies Ltd	2050%	2022-2023
Olectra Greentech Ltd	266%	2022-2023
Mazagon Dock Shipbuilders Ltd	610%	2023-2024
Gravita India Ltd	395%	2023-2024
Suzlon Energy Ltd	344%	2023-2024



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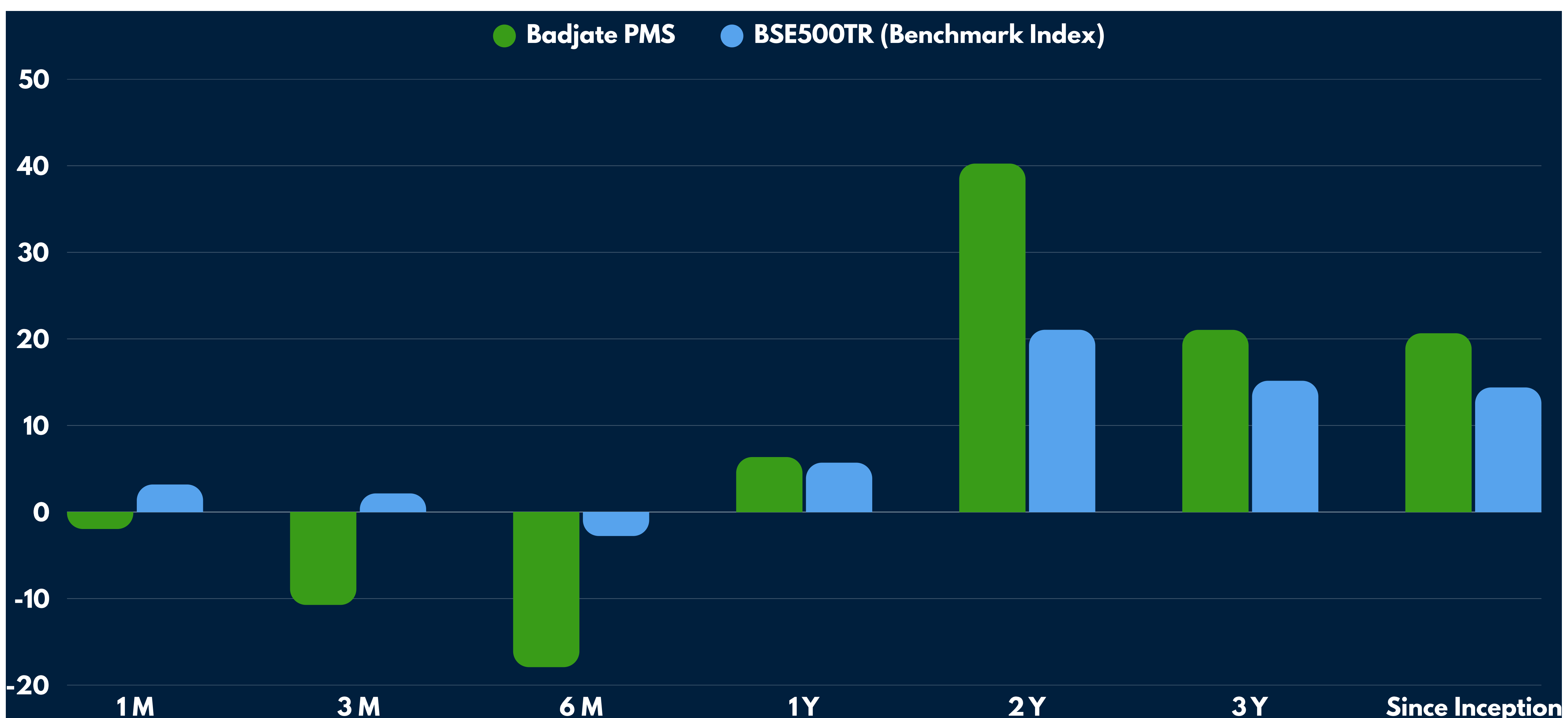
PERFORMANCE



9 Year's Fund Manager Performance



FUND PERFORMANCE



Disclaimer: Performance of Badjate Multicap Fund includes performance of Badjate Stock & Shares Pvt. Ltd. the PMS Business of which is moved to Badjate Wealth Pvt. Ltd



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DISCLAIMER & RISK FACTORS: Data Source: BWPL Internal Research; Please Note: Returns upto 1 year are absolute & over 1 year are Compounded Annualized. The performance related information is not verified by SEBI. All portfolio related holdings and sector data provided above is for model portfolio. Returns & Portfolio of client may vary vis-à-vis as compared to Investment Approach aggregate level returns due to various factors viz. timing of investment/ additional investment, timing of with drawals, specific client mandates, variation of expenses charged & dividend income. Past performance may or may not be sustained in future and should not be used as a basis for comparison with other investments. The Portfolio Manager manages allocations in all client portfolios by way of a model portfolio which is in line with investment objectives of the portfolio strategy/ investment approach. Unless there are specific exclusion instructions by individual clients, all clients' portfolios are aligned to a model portfolio; which means replication and alignment of all clients' portfolios in terms of scrip and allocation. New clients entering the strategy /investment approach as of a particular date are also aligned to the model portfolio.

It must be noted that there are certain circumstances in which clients' portfolio may deviate or differ from the model portfolios to a material extent. This may happen due to factors like liquidity and free floating consideration in some stocks, organization level exposure norms and related risk management, potential exit of a stock from the model portfolio thereby precluding it from buying in new client portfolios. The reasons quoted here are indicative but not exhaustive and the portfolio manager reserves the right to deviate from model portfolio for groups of clients depending on timing of their entry, market conditions and model portfolio construct at the time of their entry. Risk factors associated with the investment approach are Equity risk, Systematic risk, Concentration risk, Model portfolio risk, Mismatch risk and Execution risk. To know more about the risk factors, please refer disclosure document at www.badjategroup.com. Investment in securities is subject to market and other risks, and there is no assurance or guarantee that the objectives of any of the strategies of the Portfolio Management Services will be achieved. Please read Disclosure document carefully before investing.

DIRECT ON-BOARDING FOR PMS SERVICES:

Client has an option of direct on-boarding with the Portfolio Manager without intermediation of persons engaged in distribution services and no charges except statutory charges shall be levied at the time of such on-boarding. The client shall inform the Portfolio Manager if he wishes to avail the option of direct on-boarding



+91 8329046596



PMS@BADJATEGROUP.COM



WWW.BADJATEGROUP.COM