



BADJATE WEALTH

CREATE WEALTH | NOT JUST PROFITS



PRESENTING

BADJATE MULTICAP FUND

DRIVEN BY RESEARCH, POWERED BY POTENTIAL

A SEBI-Registered Portfolio Management Service



BADJATE WEALTH

CREATE WEALTH | NOT JUST PROFITS

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.



BADJATE WEALTH

CREATE WEALTH | NOT JUST PROFITS



STOCK MARKET OUTLOOK: JUNE 2025

MAY 2025 RECAP

The Nifty 50 climbed 1.8% in May, buoyed by robust corporate earnings and upbeat domestic economic signals. Despite intermittent volatility, easing geopolitical tensions fueled investor confidence. Midcap and smallcap indices outperformed, with the Nifty Midcap 100 up 6.09% and Smallcap 100 soaring 8.72%.

KEY HIGHLIGHTS:

- Investor Flows: FIIs poured ₹18,082cr into equities, signaling renewed optimism, particularly in global trade-linked sectors. DIIs bolstered the market with ₹67,642cr in net inflows.
- Monetary Policy: On June 6, 2025, the RBI slashed the repo rate by 50 bps to 5.5% and shifted to a neutral stance, boosting rate-sensitive sectors like banking and real estate.

JUNE 2025 OUTLOOK

June 2025 promises volatility as global headwinds intensify. Geopolitical flare-ups, notably Russia's response to the June 1 Ukrainian attack on its airbases, could spike oil prices and unsettle markets. The US-China trade war, coupled with rising US inflation from tariffs, may trigger FII outflows from emerging markets like India. However, India's advancing trade talks with the US and UK position it to capitalize on new market opportunities, offering a first-mover advantage for domestic producers.

KEY EVENTS TO WATCH:

Trade Agreements: Progress in India-US and India-UK bilateral trade talks could unlock export potential for IT, pharmaceuticals, and textiles, boosting market sentiment.

Geopolitical Risks: Russia's reaction to recent escalations may roil global markets, impacting oil-sensitive sectors like aviation and logistics.

Market Dynamics: Nifty 50 faces resistance at 24,800–25,000. A breakout could target 25,600, while support lies at 24,400–24,600.



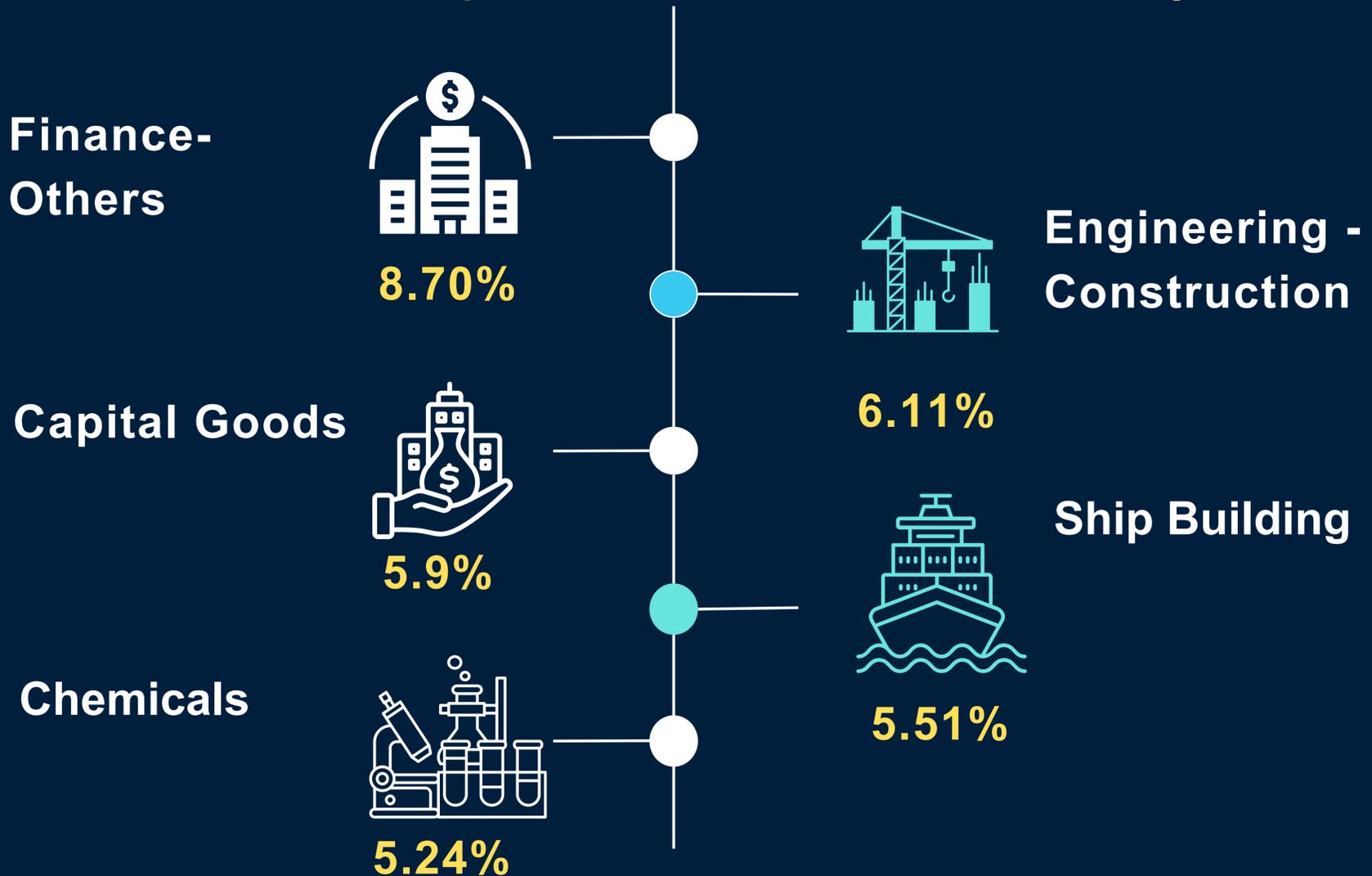
BADJATE WEALTH

CREATE WEALTH | NOT JUST PROFITS



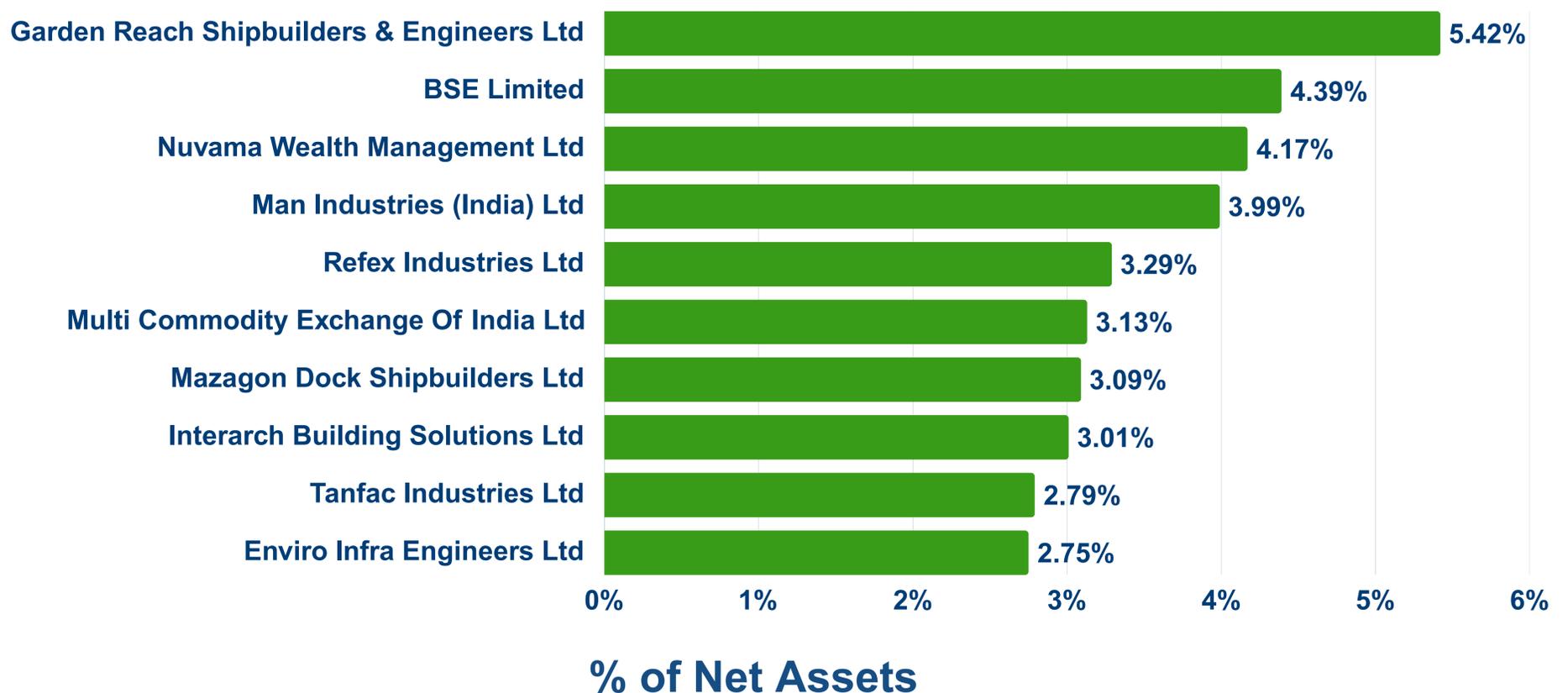
TOP 5 SECTOR ALLOCATION

These are the Top 5 sector allocations as on 31st May, 2025



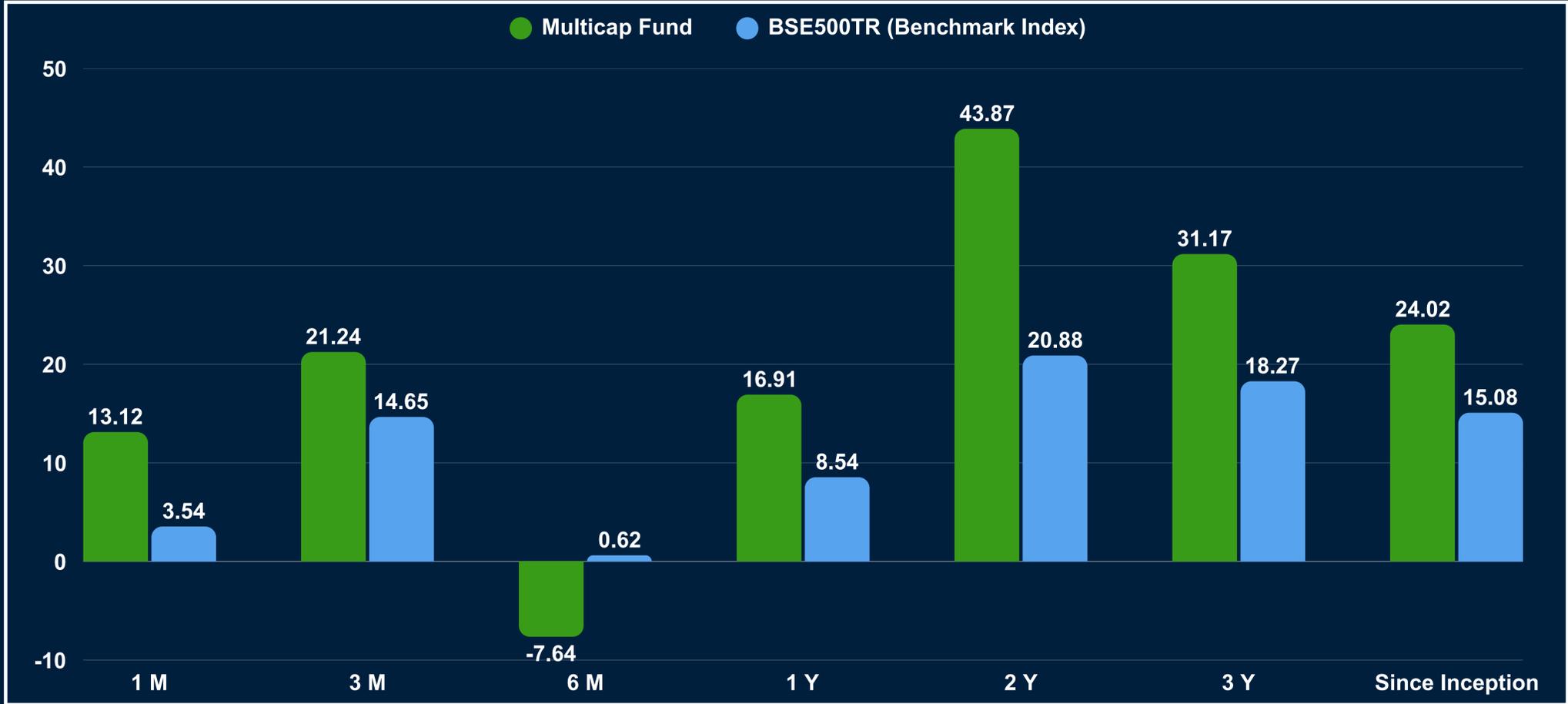
TOP 10 HOLDINGS

These are the Top 10 Holdings as on 31st May, 2025





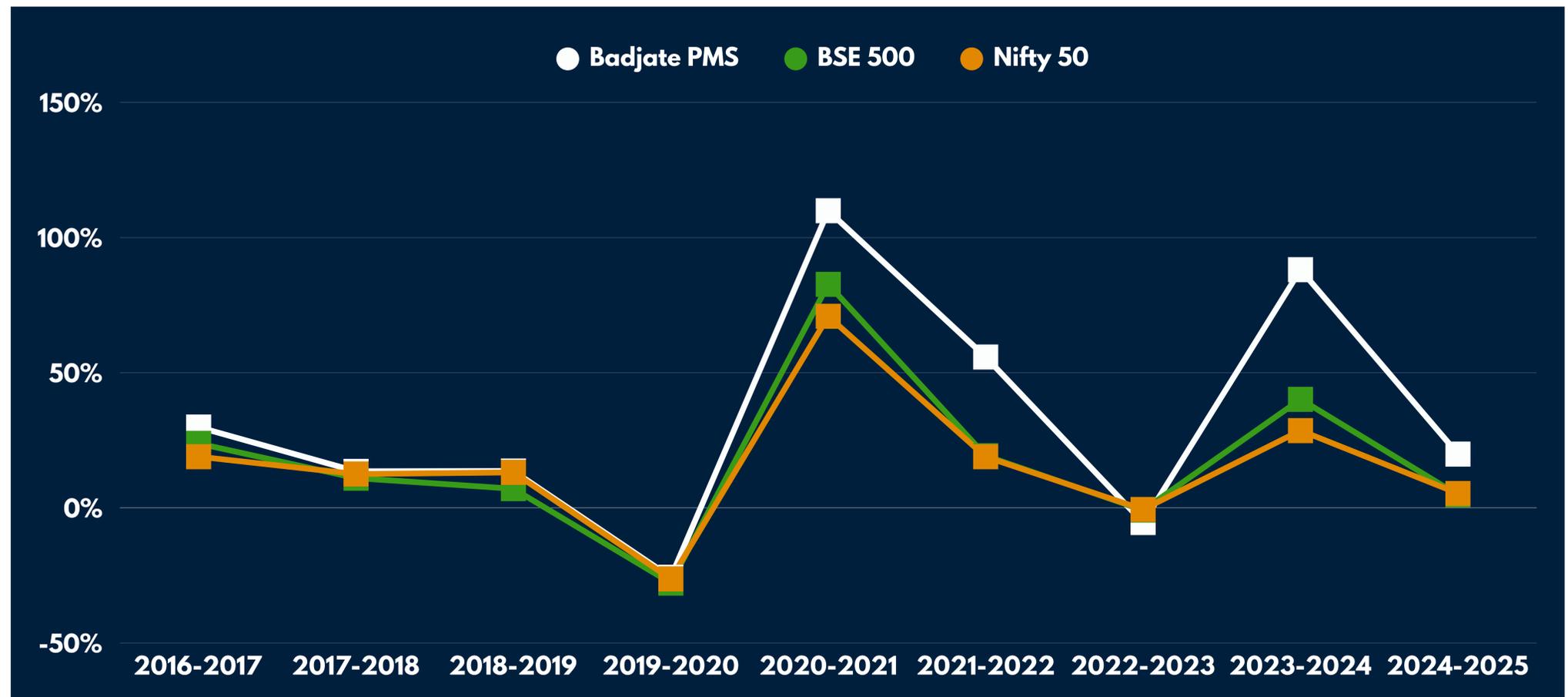
FUND PERFORMANCE



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



PERFORMANCE



9 Year's Fund Manager Performance



BADJATE WEALTH
CREATE WEALTH | NOT JUST PROFITS



OUR MULTIBAGGER STOCKS

Stocks	Returns (%)	Year
Goldiam International Ltd	600%	2021-2022
Refex Industries Ltd	1475%	2021-2022
Silchar 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

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