BADJATE WEALTH

CREATE WEALTH | NOT JUST PROFITS

PRESENTING

BADJATE GROWTH FUND

HARNESSING STABILITY, CAPTURING GROWTH

A Large Cap & Mid Cap oriented

Portfolio Management Service Fund

A product of Badjate Wealth Pvt. Ltd.

PMS registration no. INP000006527

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"At the heart of Badjate Wealth is a belief in the power of disciplined investing. Our Growth Fund endeavors to offer a balanced portfolio, combining large-cap stability with mid-cap growth opportunities.

WHY INVEST IN LARGE & MID CAP?

Largecaps

- Bluechip companies
- Market leaders in the segment
- Established track record

Midcaps

- Emerging Businesses
- Above average growth profile
- Effective managment and smart capital deployment.

Large and Midcaps

- A strategic mix of Large and Midcaps aiming to balance long-term capital appreciation with moderated volatility.

Stability of Large Caps + **Growth potential of Mid Caps** = **Better risk adjusted returns**

WHY INVEST IN BADJATE GROWTH FUND?

Experienced Management: Led by Mr. Anuj Badjate, with a proven track record in equity investing and wealth creation.

Research-Driven Approach: Strong bottom-up stock selection, focusing on quality, growth, and value.

Client-Centric Philosophy: Aligned with clients' long-term wealth goals through active and disciplined portfolio management.

Focus on Risk-Adjusted Returns: Pursuing risk-adjusted returns by investing in a thoughtfully diversified portfolio

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INVESTING PROCESS

HYBRID METHOD

- The strategy follows a mix **of top-down and bottom-up** approaches based on market conditions and views.
- Focus on stocks with a market capitalization **above ₹5,000 Crores** to ensure liquidity and scalability.

VALUATION-CONSCIOUS, RETURN OPTIMIZATION

- Companies selected will typically have return ratios (**ROCE/ROE**) above market averages.
- Emphasis on buying quality at **reasonable valuations**, ideally below broader market valuation multiples.

QUALITY + GOVERNANCE FIRST

- The portfolio will focus on high-quality companies with a proven track record of corporate governance and sustainable business practices.

ACTIVE, HIGH-CONVICTION PORTFOLIO

- Targeted portfolio of **20–25 stocks**, allowing deep conviction and active position sizing.
- No **closet indexing** — each company is chosen for its unique value proposition.

QUARTERLY RESULTS /CONCALLS TRACKING

- Thoroughly scrutinize the results of the companies under the radar.
- Listen and analyse the Concall of the company in detail.

TOP 5 SECTOR ALLOCATION

These are the Top 5 sector allocations as on 31st January, 2026

Sector	Allocation
Precious metals	17.45%
Financial Services	16.71%
Oil,Gas & Consumable Fuels	11.51%
Pharmaceuticals	7.90%
Defence	6.86%

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WHO SHOULD INVEST?

Growth-oriented investors who value stability and prudence

Investors who prefer a proactive, research-driven investment strategy

Those aiming to capture the growth potential of India's Large and Mid-cap companies.

FUND FACTS

Category
Large and Mid Cap PMS

Fund Manager
Mr. Anuj Badjate
Mr. Mangesh Narnaware

Minimum Investment
₹ 50 lacs

Benchmark
BSE 500 TRI

Portfolio Strategy
Research-driven investment strategy across large and mid-cap stocks, targeting quality companies with growth potential and attractive valuations.

+91 8329046596 | PMS@BADJATEGROUP.COM

WWW.BADJATEWEALTH.COM