



# 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



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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

Stability of Large Caps

### Midcaps

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

Growth potential of Mid Caps

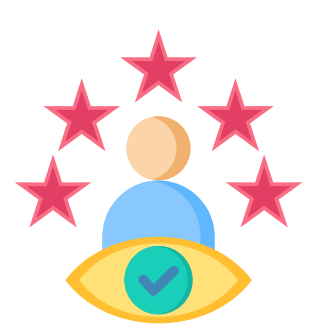
### Large and Midcaps

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

Better risk adjusted returns



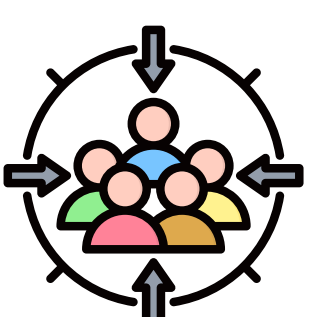
## WHY INVEST IN BADJATE GROWTH FUND?



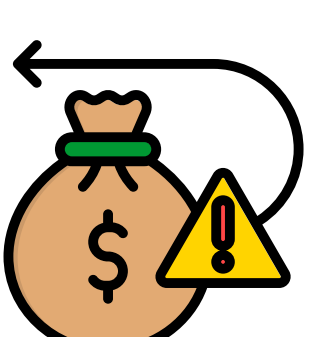
**Experienced Management:** Led by Mr. Anuj Badjate, with a proven track record in equity investing and wealth creation.



**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

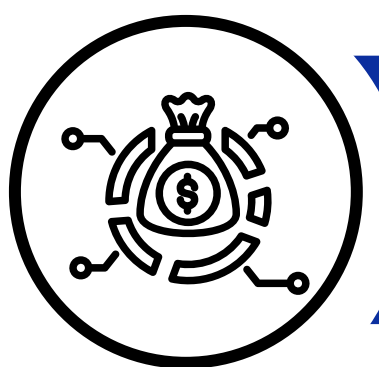
- The portfolio will focus on high-quality companies with a proven track record of corporate governance and sustainable business practices.

### 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.

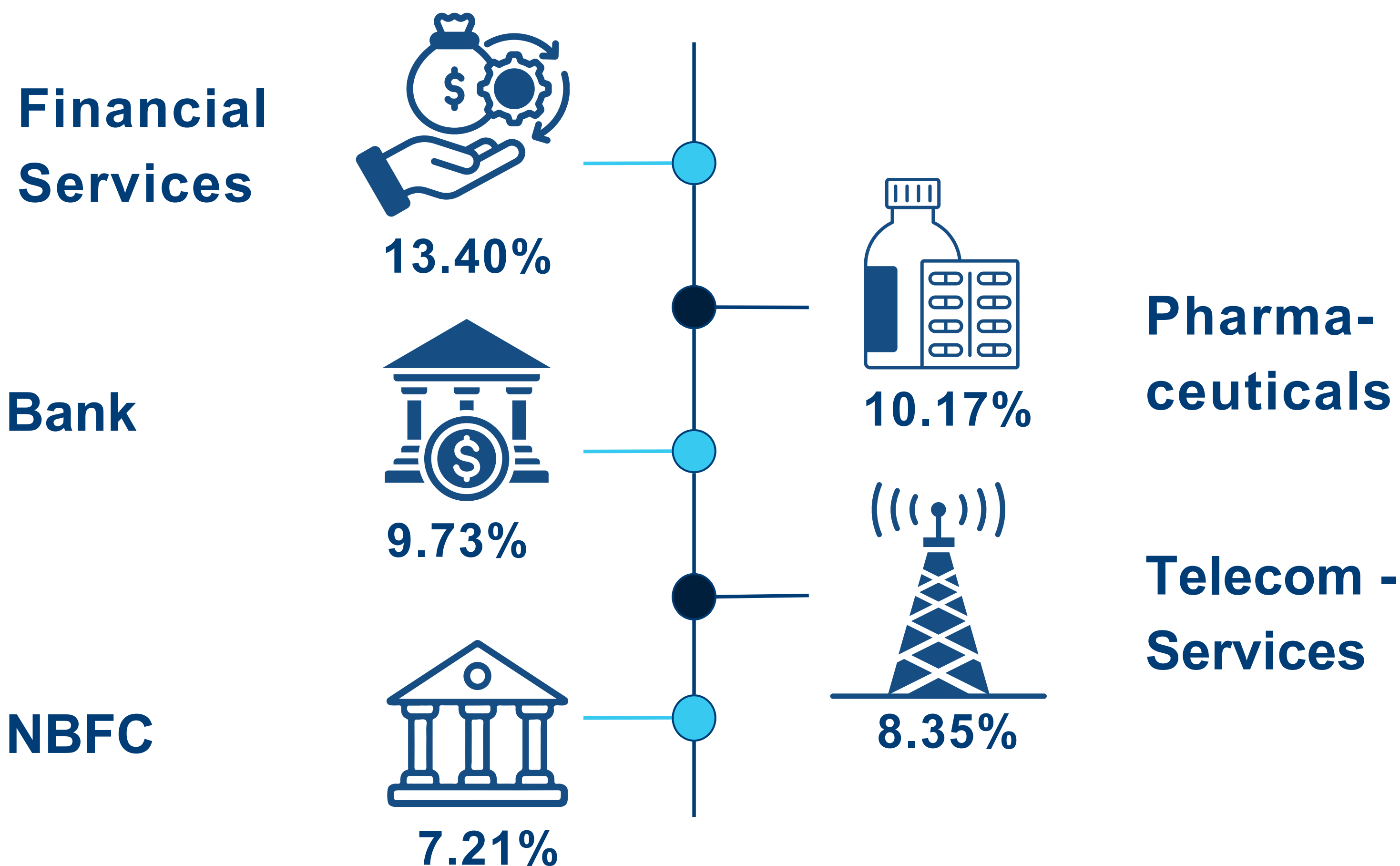
### QUARTERLY RESULTS /CONCALLS TRACKING

- 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 30<sup>th</sup> June, 2026





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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



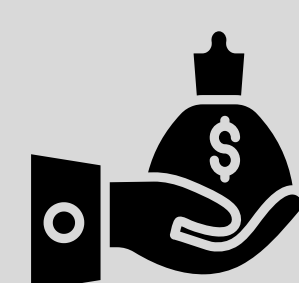
### Minimum Investment

₹ 50 lacs



### Portfolio Strategy

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



### Fund Manager

Mr. Anuj Badjate

Mr. Mangesh Narnaware



### Benchmark

BSE 500 TRI



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#### 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.

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