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?

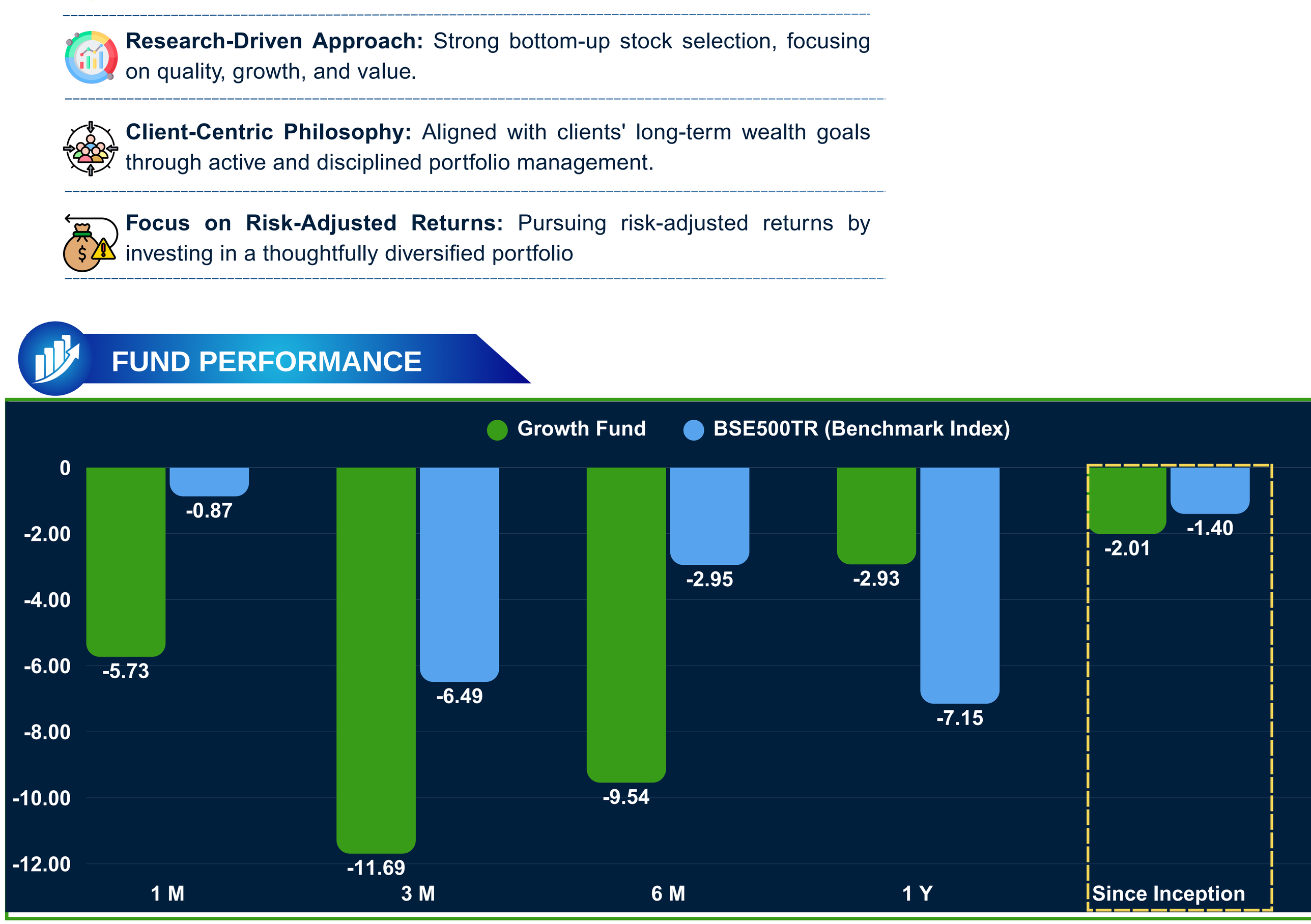
Experienced Management: Led by Mr. Anuj Badjate, with a proven track record in equity investing and wealth creation.

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

FUND PERFORMANCE



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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

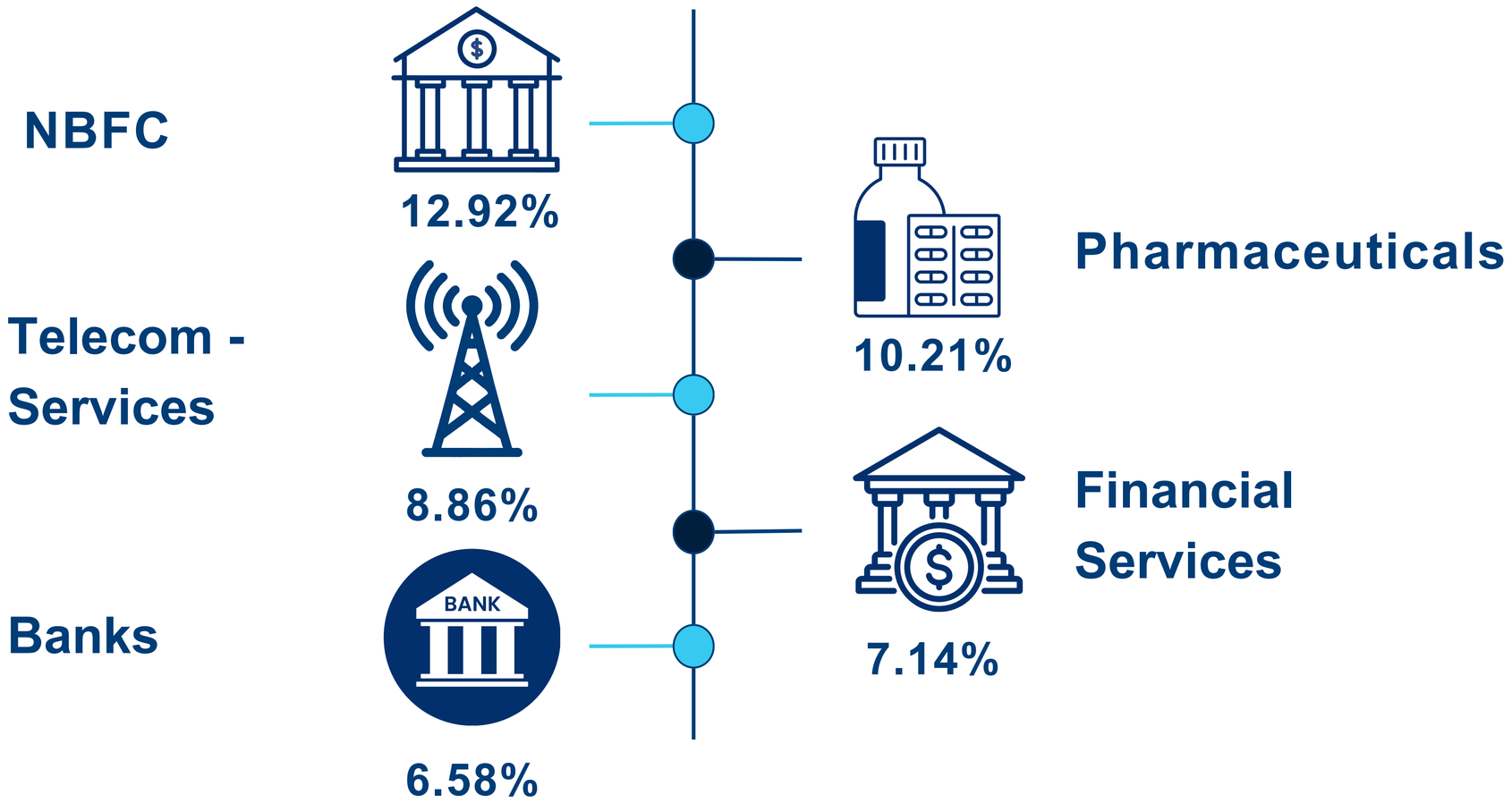
- Targeted portfolio of **20–25 stocks**, allowing deep conviction and active position sizing.
- No **closet indexing** — each company is chosen for its unique value proposition.

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 October, 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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WWW.BADJATEWEALTH.COM

Disclaimer: Investments in securities are subject to market risks. There is no assurance or guarantee that the objectives of the portfolio management service will be achieved. Past performance does not indicate future returns. The value of the investment may fluctuate and can go up or down depending on various factors. Investors are advised to read the Disclosure Document carefully before investing. Badjate Growth Fund is registered with SEBI under the PMS Regulations. SEBI Registration No.: INP000006527.

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.

Badjate Wealth Pvt. Ltd. is a unit of Badjate Stock & Shares Pvt. Ltd. which is a registered member of NSE, BSE, MCX, CDSL and AMFI