

Investment Objective:

The investment objective of POLARIS is to generate superior long-term capital appreciation by combining human discretionary macro and thematic insights with rule-based, algorithmically executed quantitative models. The strategy seeks to benefit from dynamic regime shifts while maintaining discipline in execution, risk control, and performance alignment.

Portfolio Inception Date 10 April 2026	Strategy Equity
Assets Under Management (AUM) 3.18 Cr	Benchmark NIFTY50TRI

Returns%:

	1 Month	3 Months	6 Months	1 Year	2 Year	3 Year	Since Inception
Polaris	9.44%	19.22%	-	-	-	-	23.68%
NIFTY50TRI	-1.14%	2.89%	-	-	-	-	2.09%

Monthly Performance Returns%:

Month	Polaris	Nifty50TRI
April 26	1.29%	0.96%
May 26	2.42%	-1.74%
June 26	8.18%	1.67%
July 26	0.74%	2.36%
August 26	9.44%	-1.14%

Major Holdings:

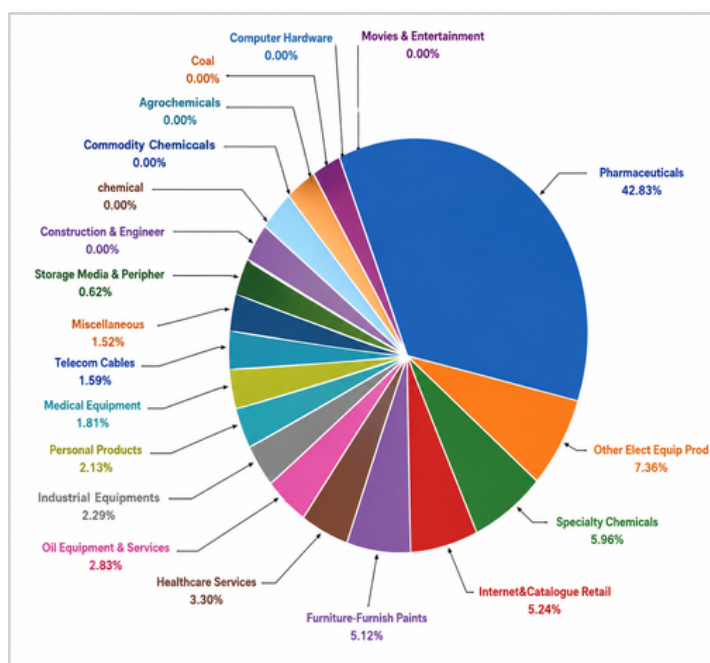
Security Name	Weight
Shilpa Medicare Ltd	25.01%
Rubicon Research Ltd	9.36%
Emmvee Photovoltaic Power Ltd	6.19%
Himadri Speciality Chemical Ltd	5.96%
FSN E-Commerce Ventures Ltd	5.24%
Sheela Foam Ltd	5.12%
Gland Pharma Ltd	3.38%
Thyrocare Technologies Ltd	3.30%
Navin Fluorine International Ltd	2.97%
Fujiyama Power Systems Ltd	2.83%

Major Sector allocation:

Sector Name	Weight
Pharmaceuticals	42.83%
Other Elect Equip Prod	7.36%
Specialty Chemicals	5.96%
Internet & Catalogue Retail	5.24%
Furniture-Furnish Paints	5.12%

Risk Ratios:

Factors	POLARIS	NIFTY50TRI
Ann. Standard Deviation	12.63	5.51
Beta	-0.61	1
Sharpe Ratio	4.19	0.93
Alpha	56	0
Tracking Risk	4.35	0



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POLARIS is a discretionary Portfolio Management Strategy that seeks long-term capital appreciation by combining human discretionary macro and thematic insights with rule-based, algorithmically executed quantitative models. The investment approach, portfolio composition, and securities selected may change depending on market conditions.

Investments in securities are subject to market risks. There is no assurance or guarantee that the investment objective of the Strategy will be achieved or that any specific return will be generated. Investors may incur losses, including loss of principal.

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