

Equirus Long Horizon Fund



Our Investment Philosophy

Equirus PMS investment philosophy is based on the synergies of value & quality. We intend to invest in undiscovered business leaders with long term potential growth. To be suitable for our Portfolio, business must have some strong merits most relevant to long term investing-qualities recognized over time by investors and are selling it at a price below the intrinsic value.

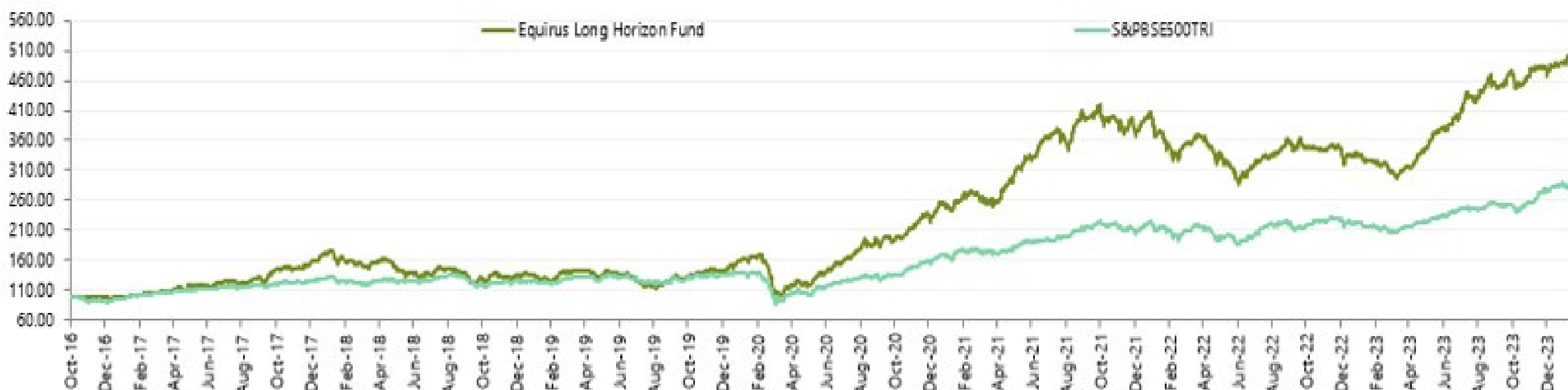
LAUNCHED IN 2016

Outshining the S&P BSE 500 Market Benchmarks

Duration	1 M	3 M	6 M	1 Y	3 Y	5 Y	Since Inception
Equirus Long Horizon Fund	3.99%	9.92%	14.22%	52.56%	27.31%	31.37%	24.80%
S&PBSE500TRI	1.92%	17.88%	16.20%	33.42%	21.87%	18.49%	15.65%

Recorded an Exceptional Performance since Inception

Comparative performance of ELHF vs. Benchmark Draw



<https://www.apmiindia.org/apmi/welcomeiaperformance.htm?action=PMSmenu>

Note: Return figures are post fees and as of Jan 31st, 2024. Return data disclosed above in the table is TWRR.

Disclaimer: Return data is net of fees and is calculated as per TWRR method as specified in the SEBI regulations. TWRR is calculated based on daily valuation of all the clients. This may differ from individual client return as return of Investment Approach is combined for all the clients. Performance related information provided herein is not verified by SEBI. Trading and investments in equities are subject to market risk, there is no assurance or guarantee of the returns, it will be purely a target return rather than guaranteed return. Please read the Disclosure Document carefully before investing.

Mastermind behind the Stellar Performance



Viraj Mehta

Managing Director & Head - PMS
Equirus

- Honoured by Wall Street Journal as an "Asia's Master Stock Picker" series for India
- **13 years** of investing experience with a proven track record of success in the financial markets
- Led the Small Companies Fund at Franklin Templeton as a as lead analyst; Fund awarded as **the best small cap MF scheme** by CRISIL & Business Standard

Awards & Recognitions



Awarded **Rank 1** in 5-year Performance in Small-cap Category- 2024 by PMS AIF WORLD



Awarded **Rank 1** in 5-year Performance across **All Categories** by IIM Ahmedabad and PMS AIF WORLD



Awarded **Rank 3** as the **Best Performing Fund in Small and Mid-cap Strategy** by CRISIL and PMSBAZAAR

Awarded as the **Best Performing Fund in Small and Mid-cap Strategy** for a Three-Year period by CRISIL and PMSBAZAAR

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