




Research Scorecard

April 2024

Dedicated team for Fundamental, Derivative and Technical research in Retail research

Total 11 fundamental research analysts covering 130+ companies across sectors

Long term Investing	<ul style="list-style-type: none">Three to five years perspective – Equity model portfolioTwelve to 15 month perspective – Conviction IdeasOthers – Muhurat Picks, Annual Strategy Picks, event based picks...
Medium term Investing	<ul style="list-style-type: none">Three to Six months perspectiveShubh Nivesh, Quant Picks and Gladiator Stocks
Short term Trading	<ul style="list-style-type: none">Seven to 30 days perspectiveMonthly and Weekly Reports – Technical & DerivativesMomentum Pick, Positional Derivatives and Volatility Insight
Intra – day Trading	<ul style="list-style-type: none">One to three days perspectiveDaily Calls – Technical, Momentum and DerivativesIntra-day Calls – BTST, Margin and Derivatives

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Research Performance – Long Term Investing

Conviction Idea Report:

Conviction Idea is a fundamental investment recommendation report with an investment horizon of 12 months and return potential of ~25%. These stocks are across market cap category namely Large to mid to small caps.

- Released 42 reports in last 10 months.
- Average returns on closed recommendations: 27%.
- Some recommendations like Gabriel India, NRB Bearings, NCC, KSB Ltd, have generated returns >50% since inception

Top 10 Conviction Idea Reports

S. No	Company Name	Date	Report CMP	Target Price	% Return
1	Bharat Wire Ropes	31-Aug-23	225	300	33%
2	NRB Bearings	07-Jul-23	206	270	31%
3	HPL Electric & Power	29-Dec-23	233	305	31%
4	Ahluwalia Contracts	05-Jul-23	614	800	30%
5	Gabriel India	20-Jul-23	200	260	30%
6	NCC	14-Jul-23	131	170	30%
7	Mahindra Holidays	13-Jul-23	310	400	29%
8	Astra Microwave Products	15-Sep-23	399	510	28%
9	Star Cement	02-Aug-23	145	185	28%
10	Exide Industries	11-Aug-23	263	335	27%

*These are our top 10 Conviction Idea Reports

Shubh Nivesh Report:

Shubh Nivesh is a fundamental investment recommendation series wherein our endeavour will be to share one investment idea every week. These stocks are primarily in Mid Cap & Small Cap category

- Released 40 reports in last 10 months.
- Average returns on closed recommendations is 26%.
- Some recommendations like PCBL Ltd, South Indian Bank, Engineers India and HUDCO have turned multi-baggers and generated returns in excess of 100% since inception.

Top 10 - Shubh Nivesh Reports

S. No	Company Name	Date	Report CMP	Target Price	% Return
1	PCBL	13-Jun-23	145	200	38%
2	Steel Strips Wheels	26-Jun-23	192	260	35%
3	Sagar Cement	07-Aug-23	236	305	29%
4	HUDCO	14-Aug-23	67.4	85	26%
5	Engineers India	17-Jul-23	127	160	26%
6	Bank of India	11-Sep-23	93	117	26%
7	Indo Count	21-Aug-23	235	295	26%
8	Brigade Enterprises	04-Sep-23	595	745	25%
9	Karnataka Bank	18-Sep-23	228	285	25%
10	Birla Corp	03-Oct-23	1234	1540	25%

*These are our top 10 Shubh Nivesh Reports

Recommended on November 3, 2023

Company	Reco Price (₹)	Target Price (₹)	Return (%)	CMP	Status*	Comments
Larsen & Toubro Ltd.	2918	3560	22.0	3517	21%	Target Achieved
Coromandel International Ltd	1058	1330	25.7	1165	10%	
State Bank of India	572	725	26.7	637	11%	Target Achieved
Spandana Sphoorthy Financial Ltd.	867	1100	26.9	1195	38%	Target Achieved
Bharat Dynamics Ltd	1001	1260	25.9	1724	72%	Target Achieved
TV Today Networks Ltd.	193	260	34.7	260	35%	Target Achieved
Century Plyboards (I) Ltd.	607	750	23.6	765	26%	Target Achieved

CMP as on 9th April 2024

Muhurat Picks performance of previous year (October 2022)

- Recommendations: 10
- Success Rate: 80%
- Average return on positive calls: 19%

Yearly Strategy performance of previous year (CY23)

- Recommendations: 9
- Success Rate: 89%
- Average return on all calls: 17%

Recommended on December 29, 2023

Company	Reco Price (₹)	Target Price (₹)	Return (%)	CMP	Status*
UGRO Capital	269	350	30.1	255	-5%
SBI Cards	760	950	25.0	742	-2%
NMDC	207	250	20.8	204	Target Achieved
Uno Minda	670	810	20.9	757	13%
Greenply Industries	238	295	23.9	266	12%
Birla Corporation	1440	1755	21.9	1416	Target Achieved
Grindwell Norton	2259	2700	19.5	2076	-8%

CMP as on 9th April 2024

Nos	Basket / Benchmark	1 Year Return		Since Inception Return	
		Portfolio	Benchmark	Portfolio	Benchmark
1	Rising Capex: Gateway to 5 Trillion Economy	60.0%	39.0%	36.0%	11.5%
2	Leaders of Tomorrow	56.0%	39.0%	21.5%	17.0%
3	Momentum Smart Beta - Large and Midcap	65.0%	39.0%	20.0%	11.0%
4	All Weather Multi Cap	41.0%	39.0%	18.0%	10.0%
5	Equity Frontline	45.0%	39.0%	15.5%	14.8%
6	Capital Compounders	51.0%	39.0%	19.7%	10.4%
7	India Rising	45.0%	39.0%	12.4%	10.2%

Data as on April 9, 2023

Fundamental One Click Portfolio MIS

Nos	Name	Benchmark			Investments till date (Rs Cr)
		Portfolio Return	Return	Outperformance	
1	Best under 100	354%	130%	223.9%	167
2	Defence 2022	284%	46%	238.1%	98
3	Best under 200	256%	59%	196.4%	19
4	Stocks under 12 PE	197%	73%	124.1%	25
5	Aatmanirbhar Bhavishya	153%	132%	20.3%	22
6	Nano Basket - Capital Goods	130%	28%	102.2%	7
7	Power	126%	33%	93.2%	8
8	Nano Basket - IT Sector	101%	28%	73.5%	20
9	Nano Basket - Infra	100%	28%	71.8%	10
10	Dividend Stars	96%	116%	-20.3%	18
11	Potential Multibagger 3.0	92%	51%	40.6%	22
12	Emerging Hospitals	86%	35%	50.7%	4
13	Travel India	84%	35%	49.0%	3
14	Mangal Arambh	84%	-	-	100
15	Fab 5 Chemicals	83%	142%	-58.9%	28
16	Best under 500	74%	51%	23.0%	4
17	House of Mahindra	73%	73%	0.3%	7
18	Nano Basket - Metal	70%	28%	41.8%	1
19	Nano Basket - Textile	64%	28%	36.1%	2
20	Best of Tatas	58%	69%	-10.7%	45
21	Nano Basket - Healthcare	49%	28%	21.2%	2
22	Most Admired Brands	46%	107%	-61.2%	23
23	Nano Basket - BFSI	45%	29%	16.5%	3

Yearly Technical Recommendations for CY24

Rec. Date	Stock Recommended	Buying Range	Target	%Profit/Loss	Comment
22-Dec-23	Reliance	2565.00	3030.00	9	Book 50% profit at 2798.00
22-Dec-23	Hindalco	572.00	675.00		Open
22-Dec-23	Tech Mahindra	1235.00	1500.00	11	Book 50% profit at 1375.00
22-Dec-23	PNB	88.50	112.00	24	Target achieved
22-Dec-23	LIC Housing Finance	513.00	670.00	30	Target achieved
22-Dec-23	Tega	1072.00	1350.00	26	Target achieved
22-Dec-23	Arvind Fashion	401.00	525.00	31	Target achieved
22-Dec-23	Glaxo Pharma	1750.00	2180.00	25	Target achieved
22-Dec-23	CESC	119.00	160.00	16	Book profit at 137.50

Yearly Technical performance for CY24

- Total Recommendations: 9
- Open: 1
- Positive: 8
- Strike Rate: 100%
- Average return on positive calls: 21.5%

Yearly Quant Picks for 2024

- Recommendations: 6
- Profits booked : 6
- Stop loss Triggered: 0
- Open : 0
- Success Rate: 100
- Average return on positive calls: 25%

Yearly Quant Picks performance in CY23

Date	Scrip	Action	Price	Target	Stop Loss	Last close	Return (%)	Time Frame	Remark
14 Dec 22	State Bank of India	Buy	610-625	790	460	638	3.7%	12 months	Profit booked
14 Dec 22	Mcx	Buy	1610-1655	2150	1260	2150	31.5%	12 months	Target achieved
14 Dec 22	Bharat Forge	Buy	875-900	1150	730	1150	29.5%	12 months	Target achieved
14 Dec 22	Sun Pharma	Buy	970-1000	1260	830	1260	27.9%	12 months	Target achieved
14 Dec 22	Ltimindtree	Buy	4350-4450	5800	3620	5800	31.8%	12 months	Target achieved
14 Dec 22	Hindalco	Buy	455-470	590	380	566	21.7%	12 months	Profit booked

CY24 Performance

- Total Recommendations: 20
- Open: 6
- Positive: 13
- Strike Rate: 93%
- Average return of Portfolio: 15%
- Average return of Benchmark, during portfolio active period: 8%

Key Highlights:

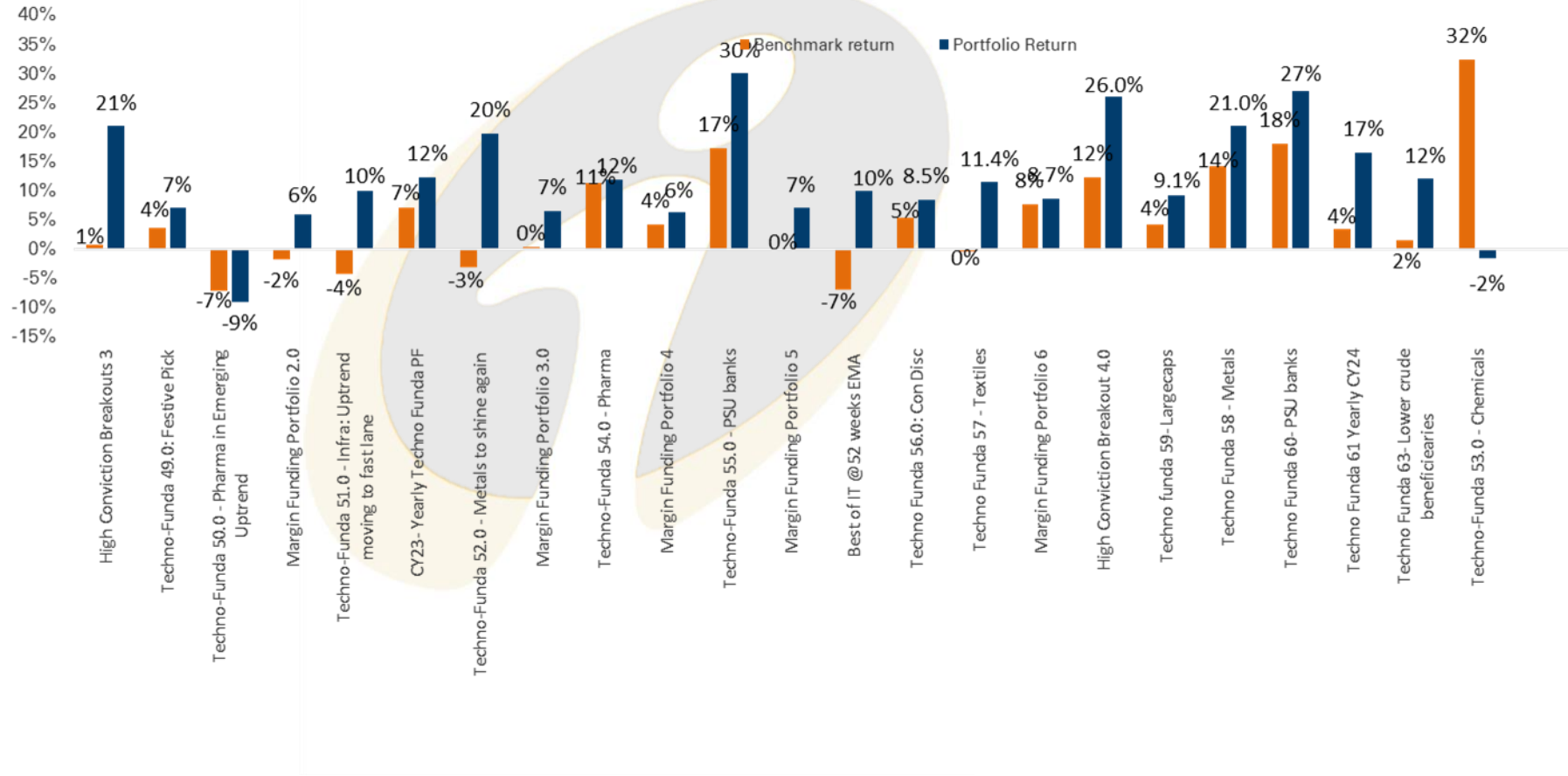
- PSU banks PF generated 27% returns in just 40 sessions
- Yearly Picks PF generated 17% returns in just one month
- High Conviction Breakout 3 generated 21% returns in less than 3 months
- Techno Funda Metal PF generated return of 20%
- All 13 portfolios outperformed respective benchmarks

Performance since inception (FY21 - till date)

- Total Recommendations: 85
- Open: 6
- Positive: 76
- Strike Rate: 96%
- Average return of Portfolio: 12.2%
- Average return of Benchmark, during portfolio active period: 6%
- 75% of the portfolios were closed within average 40 days

One Click Technical Portfolio return Vs Benchmark return since FY23

Techno Funda & Momentum Portfolio return Vs Benchmark return during the Portfolio active period



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Research Performance – Medium Term Investing

FY24 Performance

- Recommendations: 134
- Open: 4
- Exit at cost: 8
- Strike Rate: 89%
- Average return on positive calls: 8.7%
- Average return on negative calls: -7%

Key Highlights FY24:

- Recommendations were focused around outperforming sectors like PSU, Defense, PSU banks, Oil & Gas, Capital goods and BFSI
- 70% of our recommendations were in mid/small cap stocks which outperformed in FY24

Performance since inception (FY15 - till date)

- Recommendations: 959
- Open: 4
- Exit at cost: 32
- Strike Rate: 78%
- Average return on positive calls: 14.4%
- Average return on negative calls: -8.3%

FY23-24- Performance

- Number of Calls recommended: 46
- Positive payoff: 40
- Open: 2
- Success rate: 91%
- Average return on positive calls: 10%

Performance since 2018

- Recommendations: 433
- Positive payoff: 317
- Open: 2
- Exit at cost: 8
- Success Rate: 75%
- Average return on positive calls: 11.5%



Research Performance – Short Term Trading

December Performance

- Recommendations : 9
- Open: 0
- Exit at cost: 0
- Strike rate: 100%
- Average return on positive calls: 8.2%

FY24 Performance

- Recommendations : 78
- Open: 0
- Exit at cost: 0
- Strike rate: 97%
- Average return on positive calls : 7.5%

March Performance

- Recommendations : 9
- Open: 1
- Exit at cost: 0
- Strike rate: 75%
- Average return on positive calls: 5.5%
- Average return on Negative calls: -5%

FY24 Performance

- Recommendations : 339
- Open: 1
- Exit at cost: 15
- Strike rate: 87%
- Average return on positive calls : 6%
- Average return on Negative calls: -4%

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Research Performance – Intra Day Trading

March Performance

Trading	Margin Calls & Derivative calls
Total Calls	274
Positive Payoff	183
Open	0
Strike Rate	67%

March Performance

- No. of Calls : 34
- Profits Booked : 21
- Exit in loss : 1
- Exit at cost : 0
- Open/Not Initiated : 0
- Success rate: 62%

Stock Recommendations

- No. of Calls : 14
- Profits Booked : 8
- Exit in loss : 0
- Exit at cost : 0
- Open/Not Initiated : 0
- Success rate: 57%

Index Recommendation

- No. of Calls : 20
- Profits Booked : 13
- Exit in loss : 1
- Exit at cost : 0
- Open/Not Initiated : 0
- Success rate: 68%

Performance since 2018 (Stocks and Index combined)

- No. of Calls : 1601
- Profits Booked : 1092
- Exit in loss : 360
- Exit at cost : 21
- Open/Not Initiated : 31
- Success rate: 70.49%

March Performance

- Recommendations: 81
- Exit at cost : 1
- Profits Booked: 49
- Success Rate: 61%

Performance since FY22

- Recommendations: 2899
- Exit at cost : 82
- Profits Booked : 1982
- Success Rate: 70.35%

Mutual Funds: All One Click Portfolios beating Category Avg.

Core Wealth Creation			1 Yr Return			Comments
Nos.	Basket Name	Composition	Portfolio	Benchmark	Outperformance	
1	Star Performing Funds	Multicap	44.4%	40.2%	4.1%	-
2	Bluechip Wealth Creators	Largecap	42.1%	34.8%	7.3%	-
3	Star Small Cap Funds	Smallcap	48.1%	64.0%	-15.8%	Category Avg. (47%)
4	Star Midcap Funds	Midcap	54.7%	58.5%	-3.8%	Category Avg. (50%)
5	Emerging Mid & Small Caps	Midcap + Smallcap	50.5%	61.2%	-10.7%	Category Avg. (48%)
Thematic						Comments
Nos.	Basket Name	Composition	Portfolio	Benchmark	Outperformance	
1	ACE IT Funds	Sector	31.4%	26.3%	5.1%	-
2	Save Taxes	ELSS(Tax Saving)	38.8%	40.2%	-1.4%	-
3	All Seasons Equity	Top AMCs Flagship funds	46.6%	40.2%	6.4%	-
4	Tactical Asset Allocator	Equit+Debt+Gold	33.3%	25.0%	8.4%	-
5	ACE Pharma Funds	Sector	58.5%	61.2%	-2.7%	-
6	Best Passive Index Funds	Passive	48.9%	30.1%	18.8%	-
7	Gems from ICICI Pru	ICICI Pru Funds	-	-	-	-
8	ACE US Funds	International	37.3%	-	-	-
9	Star Banking Funds	Sector	30.4%	17.4%	13.0%	-
10	Dynamic Absolute Return Portfolio	Smallcap + Sector Funds	56.4%	34.8%	21.6%	
11	IDirect Research Equity Model Port	Model Portfolio	-	-	-	
Low Volatile						Comments
Nos.	Basket Name	Composition	Portfolio	Benchmark	Outperformance	
1	Equity & Debt Balanced	Balanced Advantage Fund	25.5%	25.0%	0.5%	-
2	Beat Saving Account	Debt: Ultra/Low Duration	7.5%	7.4%	0.1%	-
3	Stable Debt Funds	Debt: Medium Term	7.7%	7.5%	0.3%	-
4	Arbitrage Tax Advantage	Arbitrage	7.5%	-	-	-
Financial Goal						
Nos.	Basket Name	Composition	Portfolio	Benchmark	Outperformance	Objective
1	Retire Rich	Equity: 90%, Gold: 10%	42.4%	-		
Low Investment						Comments
Nos.	Basket Name	Composition	Portfolio	Benchmark	Outperformance	Ticket Size
1	SIP Shubh-Aarambh	Largecap + Flexicap	42.6%	34.8%		500

March Performance

- Recommendations: 50
- Exit at cost : 1
- Profits Booked : 35
- Success Rate: 70%

Performance since April 2020

- Recommendations: 2478
- Exit at cost : 30
- Profit Booked : 1712
- Success Rate: 69.06%

March Performance

- Recommendations: 195
- Exit at cost : 2
- Profits Booked : 137
- Success Rate: 70.25%

As on Date Performance

- Recommendations: 6089
- Exit at cost : 43
- Profit Booked : 4104
- Success Rate: 67.40%

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