

Model Portfolio Report

Scripts with Assigned Weights	Use the command /inds_15_2930000_n_0 in the Telegram Bot @ShubhaangBot to access the most recent Model Portfolio Composition, including the list of scripts and their respective investment weightages, specific to this subscription plan.	
Bot Command Parameters		
/	Character to recognise the text as a Command in Telegram Bots	Mandatory - Static
inds	Code specific to the Stocks Group as per the subscription plan	Mandatory - Static
15	Number of scripts needed in the portfolio as per the subscription plan	Mandatory - Static
2930000	Portfolio Investment Value	Mandatory - Dynamic
n	ETFs composition code specific to the subscription plan. 'd' for Debt ETFs, 'e' for Equity ETFs, 'n' for all other scripts.	Optional - Static
0	ETFs composition percentage value specific to the subscription plan.	Optional - Static

Factsheet

Model Portfolio Title	15 Equity Scripts Long Term Growth Portfolio Industry - Industrials Rebalancing Monthly ETFs Composition is 0% 12 Months Subscription Plan
Launch Date	2025-11-23
Portfolio Type	Industry Specific Portfolio
Portfolio Constituents	Equities
Asset Class	Equity MultiCap
Stocks Group	Industry - Industrials
Investment in ETFs	ETFs Composition is 0%
Number of Scripts In the Portfolio	15 Scripts {15 Equities and 0 All ETFs}
Portfolio Risk	Future Risk may Exceed 60% {Indicating potential risk exposure from a forward-looking perspective, while accounting for additional risk margin to accommodate unforeseen extreme volatile scenarios.}
Optimal Investment Horizon	12 or more years {A higher risk exposure in the portfolio necessitates a longer investment commitment to achieve optimal growth.}
Rebalancing Frequency	Rebalancing Monthly {Monthly rebalancing typically occurs on the first Monday following the 3rd of each month. If this schedule is missed, the rebalancing will be initiated on the subsequent Monday.}
Minimum Investment	Capital above Rs. 2930000
Subscription Fee	Rs. 73250 per annum {Excluding GST}
Investment Objective	Capture growth in logistics, infrastructure, and manufacturing sectors driving economic expansion.

Investment Rationale	Driver of Economic Expansion: The industrial sector is crucial for India's infrastructure development and manufacturing growth, offering significant long-term prospects for revenue and profit expansion.		
	Beneficiary of Government Policies and Infrastructure Spend: Initiatives like 'Make in India' and increased public investments in infrastructure boost demand for industrial goods, supporting strong earnings growth.		
	Adoption of Technology and Sustainability: Advances in automation, green manufacturing, and Industry 4.0 increase efficiency and margins, positioning industrial stocks for higher returns compared to less technologically integrated sectors or asset classes.		
Investment Methodology	1. The broad universe for securities comprises of listed companies within the NSE 500 Index and all ETFs, which are meticulously filtered qualitatively in accordance with the predefined investment objective and investment rationale. 2. Proprietary algorithms, advanced quantitative models, and technical analysis are applied to systematically identify securities with the highest likelihood of delivering superior returns. 3. These models, extensively validated across various asset classes and time horizons, incorporate customized proprietary indicators of momentum, volume, volatility, and trend, ensuring that portfolio construction is entirely driven by objective data and high-quality signals, free from biases, prejudices, or emotional influence. 4. The selection of securities and their respective weightings within the model portfolio is further optimized based on factors including the target portfolio size, ETF allocation, average daily trading turnover, available investment capital, rebalancing frequency, as well as the number of quantitative and technical criteria met by each security.		
Backtest Results of this Model Portfolio as per my Investment Model			
{Equities - over the data of last 16 years between 5 th Oct 2009 to 26 th Dec 2025}			
{ETFs - over the data of last 4 years between 15 th Dec 2021 to 26 th Dec 2025}			
Average Monthly Returns	3.55%	Annualised Returns	51.92%
Maximum Drawdown	41.81%	Annualised Risk	28.88%
Maximum Recovery Period from Downturns	30 months	Sharpe Ratio	1.573

- **"Back-test results are not indicative of future performance and do not guarantee any future returns."**
- These back-test results have not been verified by PaRRVA {Past Risk and Return Verification Agency} or any other SEBI-recognized agency.
- The impact of periodic portfolio rebalancing and transaction costs has been factored into these back-test results.

Portfolio Actual Past Performance Vs Benchmark Index

In accordance with the SEBI circular SEBI/HO/MIRSD/MIRSD-PoD-1/P/CIR/2025/004 dated 8/Jan/2025 on "Model Portfolio Framework" for Research Analysts

Portfolio Returns {Since Launch Date}	This data shall be disclosed once SEBI-approved PaRRVA becomes operational and has certified the actual past performance of this Model Portfolio. However, upon request, all previous rebalancing changes related to this Model Portfolio can be shared with its subscribers. {From 2025-11-10 to 2026-2-9; Invested for 13 weeks}
Nifty India Manufacturing Index Returns {Benchmark Index}	1.27% {From 2025-11-10 to 2026-2-9}

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Important Links: <https://shubhaang.com/StandardDisclosures.pdf>

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