SHUBHAANG
Leveraging Investments with Quants & Algos

Update: 2026-2-8

Model Portfolio Report

Scripts with Assigned Weights	Use the command **/ms8_5_5220000_c_20** 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**
ms8	Code specific to the Stocks Group as per the subscription plan	**Mandatory - Static**
5	Number of scripts needed in the portfolio as per the subscription plan	**Mandatory - Static**
5220000	Portfolio Investment Value	**Mandatory - Dynamic**
c	ETFs composition code specific to the subscription plan. 'd' for Debt ETFs, 'e' for Equity ETFs, 'n' for all other scripts.	**Optional - Static**
20	ETFs composition percentage value specific to the subscription plan.	**Optional - Static**

Factsheet

Model Portfolio Title	5 Equity and ETF Scripts Long Term Growth Portfolio | Mixed Sectors 8 - Construction Materials - Industrial Manufacturing - Automobiles - Speciality Chemicals - Insurance | Rebalancing Monthly | Commodity ETFs Composition is 20% | 12 Months Subscription Plan
Launch Date	2025-11-23
Portfolio Type	Mixed Industries/Sectors Multi Asset Class Portfolio
Portfolio Constituents	Equities and ETFs
Asset Class	Multi Asset
Stocks Group	Mixed Sectors 8 - Construction Materials - Industrial Manufacturing - Automobiles - Speciality Chemicals - Insurance
Investment in ETFs	Commodity ETFs Composition is 20%
Number of Scripts In the Portfolio	5 Scripts {4 Equities and 1 Commodity ETF}
Portfolio Risk	Future Risk may Exceed 65% {Indicating potential risk exposure from a forward-looking perspective, while accounting for additional risk margin to accommodate unforeseen extreme volatile scenarios.}
Optimal Investment Horizon	13 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. 5220000
Subscription Fee	Rs. 130500 per annum {Excluding GST}

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Investment Objective	Invest in construction materials, manufacturing, automobiles, chemicals, and insurance for diversified growth driven by infrastructure and industrial development.
Investment Rationale	Robust Growth Driven by Infrastructure and Industrial Expansion: Increasing investments in infrastructure, urbanization, and manufacturing initiatives are fueling demand for construction materials, industrial goods, and automobiles, offering significant long-term growth and earnings potential. Emerging Opportunities in Specialty Chemicals and Automotive Innovation: Focus on advanced materials, electric vehicles, and environmentally sustainable chemicals positions these sectors for high-margin growth and competitive advantage compared to traditional industries. Financial Sector Growth and Risk Mitigation: The expanding insurance industry provides steady income streams and asset diversification, while policy reforms and digital adoption in these sectors enhance profitability and stability, making them attractive relative to other asset classes or industries.
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 5th Oct 2009 to 26th Dec 2025}

{ETFs - over the data of last 4 years between 15th Dec 2021 to 26th Dec 2025}

Average Monthly Returns	4.53%	**Annualised Returns**	70.09%
Maximum Drawdown	32.67%	**Annualised Risk**	33.58%
Maximum Recovery Period from Downturns	21 months	**Sharpe Ratio**	1.894

- This information does not represent actual past performance of this model portfolio and should never be used as a basis for comparing the actual performance of other intermediaries.
- This information is presented solely as factual data derived from the back-tested results of my quantitative and technical model, intended for educational purposes only. It highlights the model's potential according to the above mentioned methodology and parameters.
- This model have employed various assumptions throughout the back-testing process.

- It should not be interpreted as an endorsement, advertisement, or prediction of future performance.
- This information should not be relied upon for decision-making purpose.
- Users are strongly encouraged to exercise extreme caution and perform thorough due diligence when utilizing this information.
- **"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.

Portolio 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 500 Index Returns {Benchmark Index}	-0.69% {From 2025-11-10 to 2026-2-9}

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

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6. How to Subscribe to a Particular Model Portfolio Plan
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