

PMS & AIF

SUMMIT 2018

26th OCT 2018 | TAJ SANTACRUZ, MUMBAI



From Left: Mr. Rajesh Kumar D, Mr. Hameed Rahman, Mr. Pallavarajan R, Mr. Daniel G M - Founders of PMSbazaar.com, Mr. Shahzad Madon, Head PMS and Alternate Asset, Reliance Nippon Asset Management Ltd. & Mr. E A Sundaram, CIO – Equities, DHFL Pramerica Asset Management - launching Special Edition & First PMSbazaar Newsletter.

The PMS & AIF Summit 2018 has been one of the prodigious events, with the credit of 23 leading AMC participants, 29 expert speakers & 400+ delegates.

Titans of Financial Galaxy converge at the PMS & AIF Summit debut

Portfolio Management Services (PMS) in India is still in its budding stage. There are about 275 SEBI-Registered PMS Managers and more than 150 strategies of “discretionary” PMS. It is a gargantuan process to gain exact knowledge on each strategy, leave alone selecting the apt strategy for one's risk appetite. It is quite common to witness a genuinely good investor is unsatisfied with a genuinely good PMS, just because apt risk-appetite was not matched. Customer education and awareness was the need-of-the-hour. PMSbazaar.com, has fulfilled the gap by launching its online platform first.

It was a welcome move initiated by PMSbazaar.com, when they announced their schedule to conduct a PMS & AIF Summit in Mumbai on 26 Oct 2018. The bookings appeared to have closed well before the Summit, and we could hear few murmurs of disappointment in the industry, from those who could not acquire a seat at the summit.

The PMS & AIF Summit 2018, commenced with overwhelming and over flowing response at 9:30 AM. The packed Summit hall filled with wonderfully attentive delegates.

Gone are the days of competition, we are in the era of contemporary evolution. The day was filled with presentations, orations, panel discussions, interviews and interactions, from the leading PMS & AIF industry doyens.

The deliberations of the summit were very re-assuring to the investors, who were confused and fearful due to the recent macro-economic imbroglio. The salient and common features insisted by every panelist/speaker/presenter, are; (1) Selection & filtering process is planned and meticulously followed before buying any stock. (2) Investors need to be patient enough to await the fruition of well conceived ideas of the PMS Manager. (3) Considering various macroeconomic factors and the correction in the equity markets during this calendar year, this is time to be cautiously-optimistic, and hence the right time to invest.

Very senior industry experts have expressed Indian structural growth story and that the stock market growth will be phenomenal to the level of “not-witnessed-before”. It is the eloquence of the oration, we find difficult to replicate.

Though we have narrated the PMS & AIF Summit 2018, conducted by PMSbazaar.com, it cannot match the experience of the delegates who attended it in person. We wish those, who missed the summit, to be lucky enough to attend the next summit by the PMSbazaar.com. We advise those who missed the summit, to try to get a copy of the “Special Edition” book released at the Summit, and the “First Newsletter” released. It is good news for the investor community that the newsletter of PMSbazaar.com is planned to be released monthly.

PMS & AIF Summit 2018, a need of the industry, conceived and presented brilliantly, will ever linger in our memories.

” Mr. Bharat Shah's important inculcating quote is “Investing is Partnering”; If added to “Uberrima Fides” (utmost good faith), can result wonderful achievements. He had differentiated between smart & wise, right & apt. His quite convincing reasoning of the topic “INDIA 2025 - A Golden Decade Ahead”; was fabulously woven to the current structural changes implemented to the effective conversion and to the ultimate fructification. His confident approach of seeing the opportunity in the current virulent macroeconomic situation was quite a consolation to the investors. His eloquent style of oration will ever linger in the hearts of every investor.

From the Founders of PMS BAZAAR



Daniel G M
Ideator & Founder - Director



Pallavarajan R
Founder - Director



Rajesh Kumar D
Founder - Director



Hameed Fiaz Rahman
Founder - Director



KNOWLEDGE SESSIONS



26.10.2018 was a day to reckon, when the grandiose-event, **PMS & AIF summit 2018**, was launched, where the doyens of the investment world, enthusiastically imbibed their knowledge & wisdom to the investors.



It wasn't surprising to note the overwhelming registration & the over-flowing participation at the summit.



Founder - Director **Mr. Pallavarajan R**, had been very swift in his welcome address. Observing the enthusiastic audience was quite felicitous.



Welcome address, was ensued, by the presentation of **Mr. Shahzad Madon**, Head PMS and Alternate Asset, Reliance Nippon Asset Management Ltd. It was quite grooming the audience on **Main Streaming of PMS & AIF**.



Oil price fluctuation & the US-Dollar appreciation, is a menace to the general public in India. **Mr. Madanagopal Ramu**, Fund Manager PMS & AIF, Sundaram Asset Management shared his views on **"Indian Equity's Tryst with \$ & Oil."**



The crux of the investment philosophy was revealed by, **Mr. E A Sundaram**, CIO - Equities, DHFL Pramerica Asset Management, when he was interviewed by **Mr. Pallavarajan R**, Founder-Director, PMS Bazaar.

KNOWLEDGE SESSIONS



Mr. Daniel G M, Founder – Director, PMS Bazaar interviewed **Mr. Taher Badshah**, CIO, Invesco Asset Management. The audiences were refreshed with insightful answers by him.



Mr. Aashish P Sommaiya MD&CEO Motilal Oswal Asset Management, delivered an address, on **"The need and importance of PMS"**. It was quite elucidating to the audience



"The Leaders Panel Discussion" by three of the Leaders, **Mr. Hiren Ved**, Co-Founder & CIO Alchemy Capital Management, **Mr. Manish Sonthalia**, Director & CIO – Head Equities – PMS, Motilal Oswal Asset Management, **Mr. G. Maran**, Executive Director, UNIFI Capital, was fabulously moderated by **Mr. Pankaj Poddar**, Research Analyst, ET Now. No wonder, the audience could comprehend the cure to the Indian market confabulations.



Mr. Shailendra Kumar, Co – Founder & CIO, Narnolia Financial Advisors Ltd. made a thought provoking talk on **"India Equity Opportunity – Investing Styles and Portfolio Risk-mitigation"**.



Mr. Muruga Prasath, Senior Research Analyst, PMS Bazaar interviewed **Mr. Ajay Bodke**, CEO & CIO – PMS, Prabhudas Lilladher and **Mr. Rajesh Kothari**, Founder & Managing Director, AlfAccurate Advisors, which confirmed to the investors that the colossal wealth creation through PMS is feasible.



The competence of the members of “Champions Panel Discussion” was evident, when, **Mr. Nimesh Mehta**, Director & Head – Sales & Products, ASK Investment Managers acted as the moderator. The panel members were, **Mr. Trideep Bhattacharya**, Senior Portfolio Manager – PMS & AIF, Axis Asset Management, **Mr. Varun Goel**, Fund Manager PMS & AIF, Reliance Nippon Life Asset Management, **Mr. Parag Thakkar**, Fund Manager – PMS, ICICI Prudential Asset Management, **Mr. Anshul Saigal**, Portfolio Manager – PMS, Kotak Asset Management, **Mr. Vishal Gajwani**, Head - Alternative Investments (Equity), Aditya Birla capital. We could feel the audience’s tempo during the panel discussions. On conclusion everyone expressed their improved trust towards the PMS managers.



There is always a vacuum in investment industry, which the conventional financial services cannot fill; and How rightly the AIF is fitting-in, is the crux of the address by **Mr. Nalin Moniz**, CIO, Alternative Equity and Business Head, Edelweiss Asset Management.



Mr. Bharat Shah, Executive Director, ASK Group, proved his might, by offering an eloquent lecture on “India 2025 - A Golden Decade Ahead”. The audience was exhilarated.



Elation caught the delegates, when **Mr. Saurabh Mukherjea**, Founder, Marcellus Investment Managers and Author of “Coffee Can Investing” took a different dimension and explained the Investment technique of **Robert Kirby’s “Coffee Can Investing”** and Mr. Mukherjea’s variation of the technique.

The arcane of the AIF was unveiled, when **Mr. Saurabh Mukherjea**, Founder, Marcellus Investment Managers moderated the panel discussion on “Opportunities in AIF”. The participating AIF experts were, **Mr. Prashasta Seth**, Senior Manager partner / CIO, IIFL Asset Management, **Mr. Pradeep Khanna**, Head real Estate Investment, Reliance Nippon Life Asset Management Ltd, **Mr. Vaibhav Sanghavi**, Co – CEO, Avendus Capital, **Mr. Chakri Lokapriya**, CIO, TCG Asset Management.



Valedictory address by **Mr. Daniel - G M**, Founder - Director, PMS Bazaar - was skillfully short & sweet, expressing thanks to all the sponsors & to those who helped to shape this event a grand success.

”

AIF Platform's various categories of I, II and III were explained. It was quite interesting to note the various approaches to scale the performance of AIF in the absence of apt benchmark. It was a good revelation that the freedom of the AIF Manager actually better the risk-mitigation process by innovative methodologies. The summit unveiled the real potential of the AIF platform.

”



Mr. Shahzad Madon

Head PMS and Alternate Asset
Reliance Nippon Asset Management Ltd

The PMS & AIF Summit 2018 is a wonderful platform and it is much needed. It is a great initiative taken by ET Now and PMS Bazaar in promoting the industry and bringing the industry to investors causing more transparency. The initiatives taken by PMS Bazaar and ET Now are superlative initiatives, much-called-for and will go a long way in promoting the growth of the industry.



Mr. Anshul Saigal

Portfolio Manager - PMS
Kotak Asset Management

I would like to thank PMS Bazaar for bringing me here, I was pleasantly surprised to find that it was a full house, and there was active participation at all levels. For the first time the entire PMS & AIF industry is in one platform. It is quite a unique event and I wish PMS Bazaar and the entire industry all the best for the future.



Mr. Aashish P Sommaiya

MD & CEO
Motilal Oswal Asset Management

I would like to compliment PMS bazaar for fantastic organization of the event, it is a first of its kind but long overdue somebody had to take this initiative to create more awareness about PMS & AIF. I would like to wish them all the success.



Mr. Varun Goel

Fund Manager - PMS & AIF
Reliance Nippon Life Asset Management

It is a great platform for lot of people in the industry such as investors fund managers, distributor partners, IFAs and the analyst community who came to share their views about the industry and market. It's a great platform which we believe will help in standardization and encourage more authentic research on PMS products in the market. I wish PMS Bazaar all the very best and hope to see the event happen on recurring basis bigger and bigger with every passing year.



Mr. Vishal Gajwani

Head - Alternative Investments (Equity)
Aditya Birla Capital

The event by PMS Bazaar is the first in the industry which covers extensively all the PMS strategies. This is a good initiative as it helps the investor to know about the pros and cons of PMS. Lot of good work by PMSbazaar, keep it up.



Mr. Trideep Bhattacharya

Senior Portfolio Manager - PMS & AIF
Axis Asset Management

This being first in the industry event organized for PMS & AIF investors has definitely been a great success and I am feeling great to be a panelist here. And I look forward to participating in further conferences in upcoming years. I hope and believe that success will multiply from today.

“The PMS & AIF Summit 2018 has been one of the prodigious events, with the credit of 23 leading AMC participants, 29 expert speakers & 400+ delegates.”

“Over every cycle of ups and downs and huge inflows and outflows, ultimately a constant PMS portfolio outperforms almost the entire peer set of comparable Mutual Funds.”

“Only a mythical time-machine can go back-and-forth, unfortunately, we humans cannot time the market. Hence, staggered investment through STP/SIP/TOP-UP in PMS and the Bottom-up approach are the best alternatives for a cautious investor. However, the current market condition assessed by almost all the experts suggest us “This is the time to be Greedy”

“Wealth Management industry is thriving with numerous innovative conceptualized strategies. Gone are the days of vanilla offerings, we are in the era of differentiated offerings.”

“AIF is one of the rapidly growing industries for the past five years. The abundant growth of the Funds-raised-by-the-AIF-industry, is 139% CAGR over the past five years. About 462 AIFs have been set-up and operational so far, with regulatory nod from the SEBI. The entire gamut of financial services industry, namely, AMCs, Private Equity, Venture Capital Firms, Hedge Funds, Corporate, Boutique investment funds, and individuals, have all ventured into the AIF platform..”

“Investors seeking a Quality portfolio with patience to wait for 5 years, should prefer PMS, because, PMS offers limited churn and High conviction, and structurally suited to outperform all other actively Managed Financial products.”

“PMS has become the first choice of the most-affluent & HNI investors. PMS in Listed-Equity-Discretionary portfolios have grown at the rate of CAGR 50% in the last five years. The transparency in the PMS is the maximum compared to any other investment vehicle, as the PMS reveals trade-data (day-to-day), brokerage costs, STT, taxation, monthly-expenses-debit-note etc..”

INVESTOR CONNECT INITIATIVES



BEST MOMENTS





We're pmsbazaar.com (PMS Wealth Advisors Pvt Ltd), India's first online portal for investors looking for Portfolio Management Services (PMS) comparisons, investment, information, analytics and investment advice. We cover nearly the entire range of PMS avenues available in India, including discretionary and non-discretionary investment options. PMS Bazaar is one destination for all Portfolio Management Services needs of investors.



First of it's kind in India for PMS



Best Financial Services Award 2018



4000+ Registered Investors



10+ Countries Support

PMS WEALTH ADVISORS PVT LTD

CHENNAI

Old 24, New 53, 2nd Floor, 1B, Wellington Estates
Ethiraj Salai, Egmore - Chennai - 600 008.

MUMBAI

91Springboard Lotus, 1st Floor, Plot D-5, Road No. 20
Marol MIDC, Andheri East, Mumbai - 400 069.

Get PMS Advice

+91 98840 88886 / info@pmsbazaar.com
www.pmsbazaar.com

Platinum Sponsor



Gold Sponsors



Silver Sponsors

