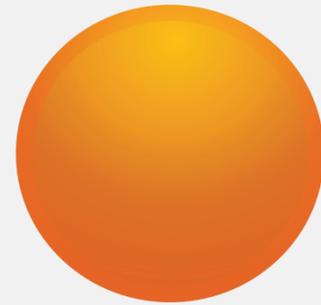


*Purnartha*

RESEARCH - RESULTS - RELATIONSHIPS



Purnartha

SAMPURNA

PURNARTHA INVESTMENT ADVISERS PVT LTD

**LAUNCHING  
SOON!**

# *Utthan*

[RISE]

By endeavouring to bring together ethics with profits, we aim to grow.

By striving to build wealth even without directly handling client funds, we aim to enrich.

By using intensive research we create journeys that aim to accomplish growth.



*Creating journeys that  
uplift you*

# Swagatam

## [THE FIRST STEP]

Purnartha started out with the simple intention of bridging the gap between what was and what could be.

A simple goal that has created and nurtured a unique equity investment advisory ecosystem, backed by the timeless concepts of trust and transparency.

Today, the **what could be** is finally echoing the **what is**.

Today we welcome you to Purnartha's journey. The journey that aims at wealth creation.

The journey that connects opportunities with confidence.

*'Vasudhaiva Kutumbakam.'*

*'The world is one family.'*

*With a greeting to the gods,  
we welcome you to the Purnartha family*



Companies that show strong fundamentals and are likely to witness robust growth in revenue

Companies that display margin expansion and net profit growth across cycles

Net Cash companies (zero net debt) i.e. growth funded by clients & internal accruals rather than debt

Companies with lower drawdowns and potential to recover quick

Use of a proprietary algorithm based quantitative model to select stocks from 10-year data across sectors to build a portfolio aimed at wealth creation

*The five petals of our investment philosophy*

# Chayan

## [INVESTMENT PHILOSOPHY]

We rigorously look for companies that satisfy all five of the above qualities. This universe of companies is filtered through our proprietary quantitative model to select stocks that could have the best potential for wealth creation.

***"In God we trust. All others must bring data."***

*- W. Edwards Deming, Statistician*



# Shodh

## [RESEARCH]

In a market that thrives on ambiguous investment tips and gut feelings, Purnartha uses a proprietary quantitative model powered by well thought-out algorithms that come up with possible investment opportunities which are further examined by the Research team.

We select stocks of companies that display strong fundamentals, are supported by business tailwinds, have potential for growth and show a resilience to bounce back in the face of adverse market conditions. In addition we also look at stock prices and performance trends.

### History

We look at stock performance across various data points for over a decade. For stocks that have been listed on the bourses relatively recently, we look for only those that have been listed for at least 5 years. This historical data allows us to examine the market's acceptance of such stocks, and see the stock performance beyond its initial price discovery stage. Such historical data also permits a better reading of stock price trends and refines the stock selection process.

### Proprietary Quantitative Model

Purnartha uses a proprietary quantitative model for stock selection that has been tested with raw data spanning over 10 years to arrive at a shortlist that is rigorously examined for investment. The algorithms built into this model then help select few stocks to arrive at a portfolio construct that has a good risk-reward balance. Such portfolios are also tested for their resilience to market downturns to check for quicker recovery from lows.

The quantitative model is also continually refined by incorporating learnings and parameters that make the stock selection sharper and better aligned to our requirements. This continuous upgradation of the algorithm assists the Research team in narrowing on the most suitable stocks that show a favorable risk reward ratio.



*With an intensive research process,  
nothing slips through our fingers*

# Shodh

[RESEARCH]

## Stock selection methodology

Our proprietary quantitative model is built on a data-driven algorithm that looks for growth-oriented companies in non-cyclical businesses that show consistent revenue and operations cash flow growth. Such parameters are indicative of the soundness of the company's operations, depth of management and demand for the company's products in the marketplace. These selected companies are then examined by the Research team to arrive at a collection of stocks across market capitalisation and sectors that could endeavour to create wealth in the future.

A company's growth if funded by clients and not debt, is a positive indication. A Net cash company possesses a brilliant competitive advantage in the market. A fairly unexplored avenue when it comes to deciding investments, being a cash rich business is an important part of our consideration as it tells us a lot about company stability during rocky market conditions.

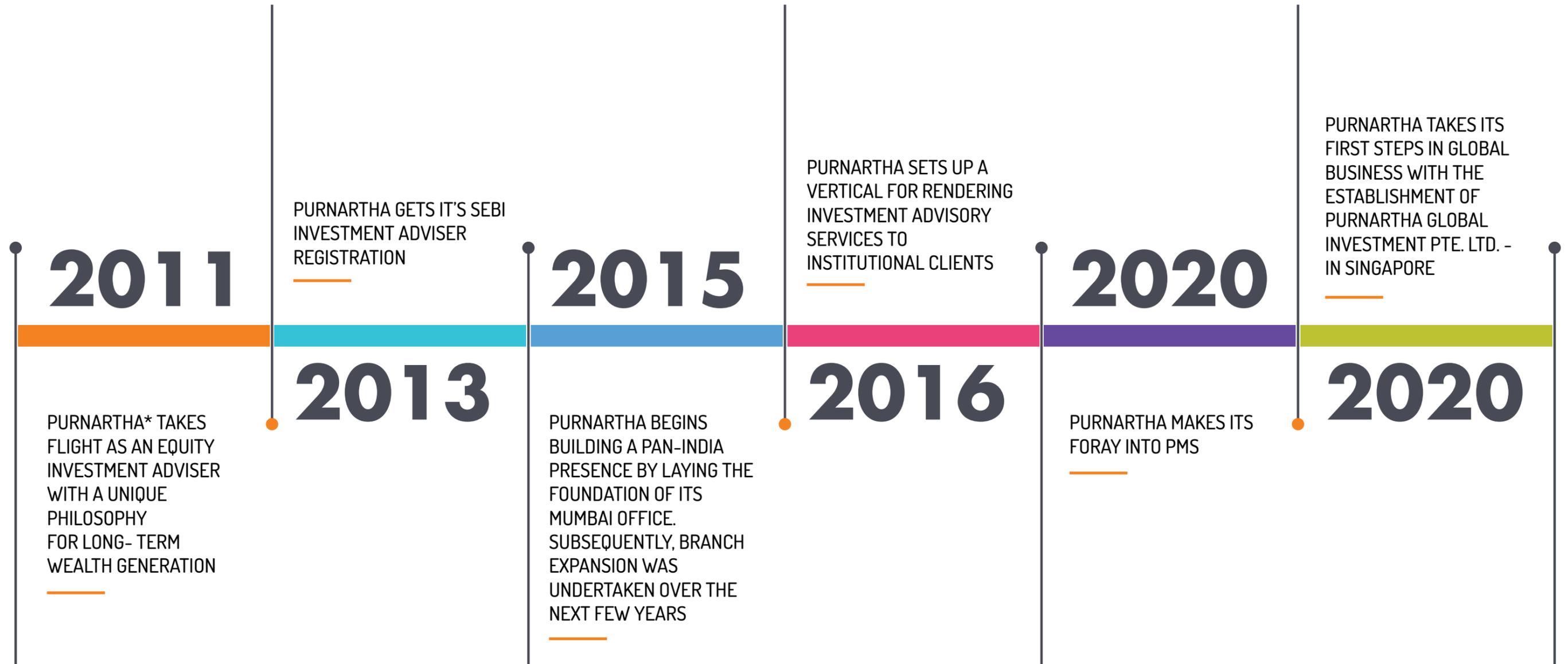
The resultant of philosophy is lower drawdown and faster recovery driven by strong fundamentals of the company.



*The journey with Purnartha  
is a path of clear direction*

# Yatra

## [THE JOURNEY]



\*The Company was formally incorporated in March 2011 as Capmetrics Technology Solutions Pvt. Ltd. The name of the company was later changed to Capmetrics Investment Advisers Pvt. Ltd. in July 2015 and to Purnartha Investment Advisers Pvt Ltd in September 2017.

“

WHAT IS GOOD FOR MY FAMILY AND ME IS WHAT WE RECOMMEND TO OUR CLIENTS, TRUE TO THE PHILOSOPHY OF 'VASUDHAIVA KUTUMBAKAM.'

”

- RAHUL RATHI



## *Netri*

### [LEADERS]

Introducing the team that passionately roots out the best the market has to offer.  
Introducing, the people of Purnartha.

### [RAHUL RATHI]

#### **Chairman**

Our overall extraordinaire-in-chief, Rahul Rathi has 15 years of investment and risk management experience gained from working with global investment institutions. His professional and personal legacy of creating wealth in the stock market has inspired Purnartha's fundamental investment philosophy. With a Master of Business Administration degree from Carnegie Mellon University, USA and a Polymer Engineering degree from the University of Pune, Rahul has groomed and led a qualified and experienced research team over the years.





## [RAGHU SUNDARAM]

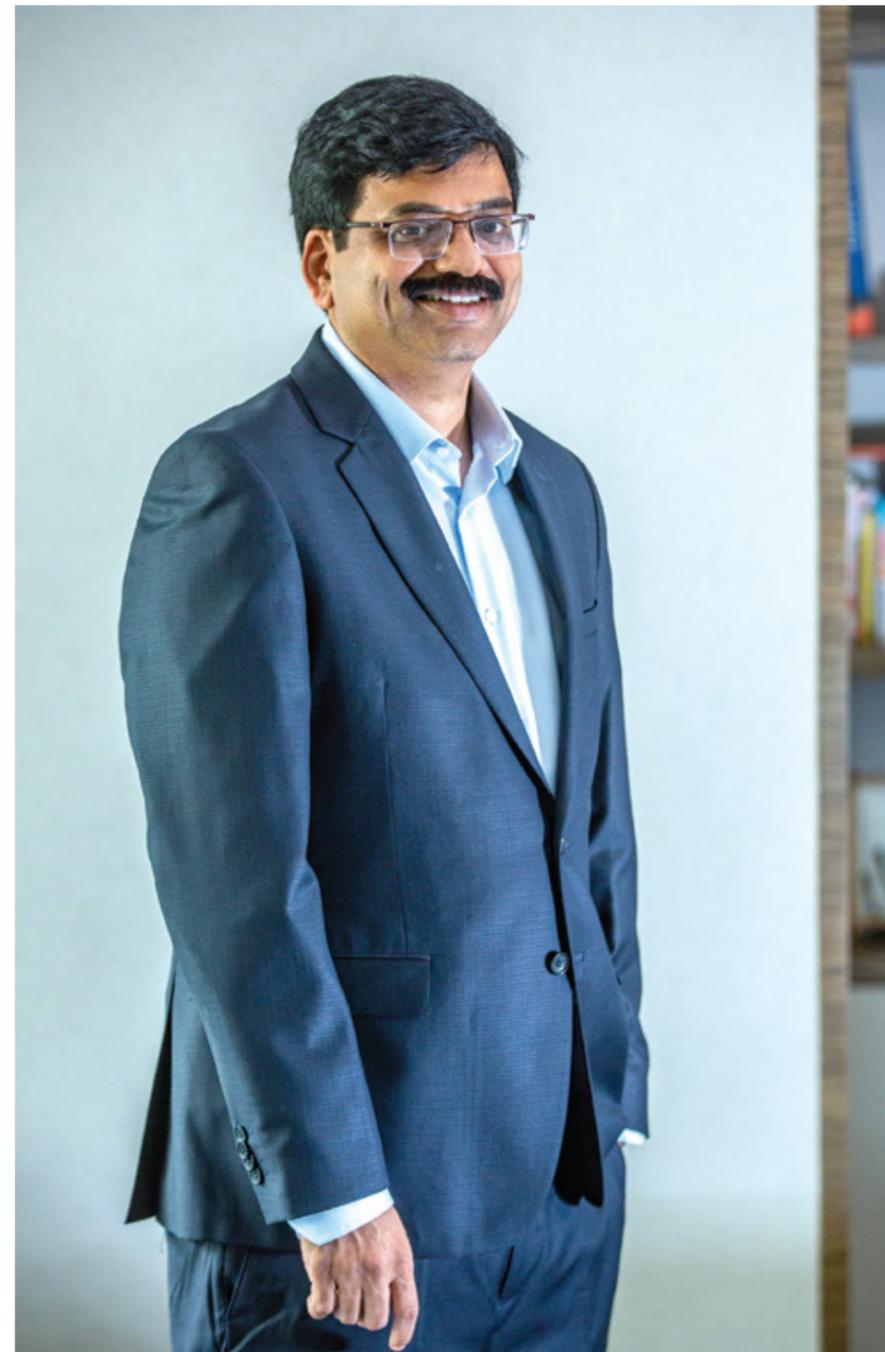
### **Co-founder**

An IIM graduate with a PhD from Cornell University, Raghu Sundaram is Dean, New York University's Stern School of Business. He has worked with major Wall Street firms and possesses an incomparable background in derivatives and credit research, providing finesse to the equity research at Purnartha.

## [HEMANT VISPUTE]

### **Managing Director**

As our Managing director, Hemant Vispute brings over 20 years of experience in consulting, strategic planning operations in India and overseas. The brain and heart of Purnartha, he has been an integral part of the journey from the very beginning. His leadership, vision and discipline has infused our teams with strategic guidance, helping conceptualize blueprints related to business development and expansion aspects.





## [TAUSIF AHMED]

### Head of Sales

A student of Economics, Tausif Ahmed has a postgraduate in Advanced Economic Theory from the University of Calcutta and an MBA in Finance. Previously, he headed the business for Kotak in the Maharashtra region for 11 years. Tausif joined Purnartha as head of Sales and has led the development and expansion of the business by building a dedicated and passionate sales team with an orientation towards client satisfaction.

## [DEVENDRA PHADKE]

### Principal Officer - Investment Advisory

A Chartered Accountant and a commerce graduate from Pune University, Devendra Phadke has over 18 years of experience in Equity Research. He is a proficient analyst with more than a decade of experience in buy-side equity research spanning emerging and developed markets such as India, China, Brazil and US and Europe. Previously, he has worked with Morgan Stanley, Thomas Weisel International and Multi-Act Asset Management. Devendra has been instrumental in building the proprietary quantitative model for stock selection and has used his experience extensively in rigorously testing the data to ensure that the model selects the most suitable stocks for inclusion in the Purnartha portfolio.



## WEALTH PLAN TO SUIT YOUR GOALS

### 3 YEAR PLAN - Fees(Rs)

#### Year 1



#### Year 2

Rs 2,500 per quarter

#### Year 3

Rs 2,500 per quarter

Fees are payable for two quarters in advance  
GST and applicable taxes will be charged extra.



# PURNARTHA SAMPURNA

## WE PROVIDE EQUITY INVESTMENT ADVISORY

**Purnartha Investment Advisers Pvt. Ltd.**  
**SEBI Registered Investment Advisory**  
**(Registration No. INA000000672)**

**Pune :**  
32/33 Rachna,  
Dr Ketkar Road, Off Karve Road,  
Erandwane,  
Pune - 411 004

**New Delhi :**  
Plot No-3E/10, Ground Floor,  
Jhandewalan Extension,  
New Delhi - 110 055.

**Kolkata :**  
A-9, 4th Floor,  
Chatterjee International Centre 33A,  
Jawaharlal Nehru Road,  
Kolkata - 700 071

**Chennai :**  
Shakti Towers, 4th Floor,  
A block, 766, Anna Salai,  
(Mount Road),  
Chennai - 600 102

**Nashik :**  
Vijay Villa, 1st Floor,  
Behind Vijan Hospital,  
Vise Mala College Road,  
Nashik - 422 005

**Mumbai :**  
Office no. 301, C wing, 3rd Floor,  
Marathon Futurex, N. M. Joshi Marg,  
Lower Parel,  
Mumbai - 400 013,

**Hyderabad :**  
302, Ashoka Vishnu Capitol,  
3rd Floor, Annapurna Studios Lane,  
Off, Road No.2, Banjara Hills, Hyderabad,  
Telangana - 500 033

**Bengaluru :**  
Office Number 001/002, Palms Square  
Building, Opp Brigade Tower, Brigade Road,  
Bangalore - 560 025

**Ahmedabad :**  
A705, Mondeal Heights,  
Near Iscon Cross Road,  
SG Highway,  
Ahmedabad - 380 015

[www.purnartha.com](http://www.purnartha.com)

CIN No.: U 72200 PN 2011 PTC 138994

1 800 102 6975 (Toll Free)  
servicedesk@purnartha.com



Visit Our Website

### Disclaimers & Risk Factors:

Investments in securities markets are subject to market risks and there is no assurance or guarantee that the objectives of the investments / investment products / clients will be achieved. Prospective investors are advised to review the Client Agreement and other related documents carefully and in its entirety and consult their legal, tax and financial advisers to determine possible legal, tax and financial or any other consequences of investing as per the investment advisory of Purnartha Investment Advisers Pvt.Ltd. ("Investment Adviser"), before making an investment decision. Past/simulated performance of the Investment Adviser does not indicate the future performance of the Portfolio or performance of any other future portfolio(s) or stocks recommended by the Investment Adviser. Nothing contained in this document is verified or approved by Securities and Exchange Board of India (SEBI). The stock(s)/Sector(s) mentioned in this material do not constitute any recommendation of the same and the portfolios may or may not have any present / future positions in these Stock(s)/Sector(s). In preparation of this document, the Investment Adviser has relied upon an algorithm based model and data/inputs from some external parties. The Investment Adviser does not assure the accuracy or adequacy of such data/information. Nothing contained in this document shall be construed as an investment advice and the Investment Adviser shall not be responsible or liable for any loss or damage arising from the use of this material by anybody in any manner.