

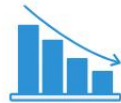
CLOVEK QUANT+

INTRODUCING CLOVEK QUANT+ PORTFOLIO: YOUR GATEWAY TO SMART INVESTING!

Clovek Quant+ helps you invest smarter, not harder. It's designed to empower you to achieve superior returns by blending data-driven insights with expert subjective analysis. Our innovative approach focuses on selecting top-performing, high-quality stocks to ensure your investments grow steadily and securely. Think of it like picking winning horses but with a secret formula!

For Subscriptions Visit www.clovek.in

KEY HIGHLIGHTS



Data-driven Quantitative Approach

Employs a data-driven approach to screen, score, and rank stocks objectively.



Factor-based Investing

Combines momentum and quality factors to enhance portfolio resilience and performance.



Subjective Analysis

Our research team conducts subjective analysis to refine and validate stock selections.

INVESTMENT OBJECTIVE

Quant+ leverages factor-based investing, focusing on momentum and quality, to deliver superior returns. It captures strong trends in high-quality stocks while maintaining balanced risk, ensuring consistent performance for long-term wealth creation.

INVESTMENT MECHANISM

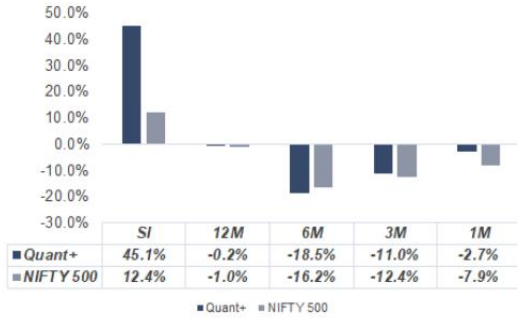
Quant+ uses a data-driven model to screen, score, and rank stocks, enhanced by subjective analysis for validation. It selects high-quality stocks with strong momentum, ensuring diversification across market caps and sectors while incorporating exit strategies to manage risk.



CLOVEKWEALTH

KEY PERFORMANCE (FEB' 25)

PERFORMANCE VS BENCHMARK



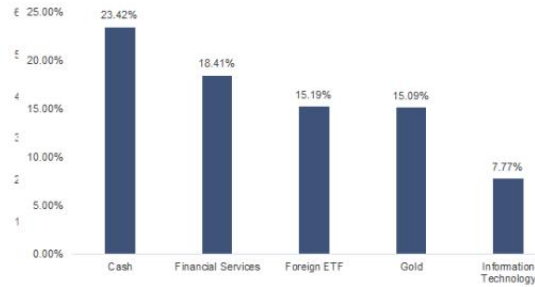
* SI is in CAGR, while the rest are in absolute terms.

* Returns are pre-fee.

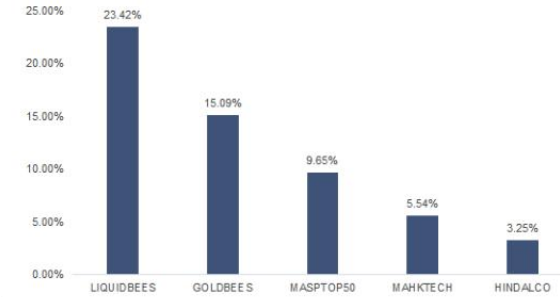
* Back tested results since inception (1st Jan' 23)

* Portfolio launched on 4th July 2024

TOP FIVE SECTORS



TOP FIVE COSTITUENTS



BETA

1.20

SHARPE

1.76

ANNUALIZED VOLATILITY

21.8% Vs 15.8% (NIFTY 500)

KEY INFORMATION

TICKET SIZE

Rs. 12 Lakhs
(+/- 5%)

BENCHMARK

NIFTY 500

TIME HORIZON

3+ Years

NO. OF STOCKS

50 Stocks

FEES

2.5% AUA + Taxes

PORTFOLIO ADVISORS



SACHIN KAPOOR, CFA

Founder & Chief Investment Officer
Clovek Wealth

He holds a CFA designation from the CFA Institute, USA, and an MBA from ICAI, with 17 years of experience in the Asset Management industry and Capital Markets.



ANKIT BHANJA

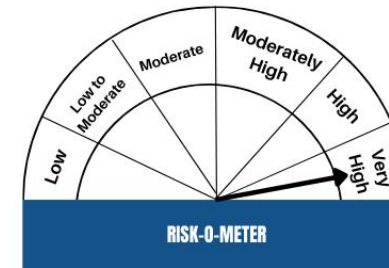
Quant Analyst
Clovek Wealth

He holds an MBA degree in Finance from IMT Ghaziabad and a Bachelor's degree in Computer Science from HITS, Chennai, with 3 years of experience in the BFSI segment with TCS.

PRODUCT LABEL

This product is suitable for;

- Long Term Capital Appreciation
- An actively managed thematic equity portfolio that invests in stocks exhibiting momentum & quality characteristics



DISCLOSURES

STATUTORY DETAILS | Name of the Investment Advisor: Clovek Wealth Management Pvt Ltd | Type of Registration: Non-Individual | Validity of Registration: July 27th 2020 to Perpetual | Registered Office Address: B-915, Tower B, Advant IT Park, Sector - 142, Noida, U.P. - 201305 | Contact No: 0120 - 4953325 | SEBI Registration No: INA100014879 | BASL Membership No: BASL1599 | CIN: U67100UP2019PTC118958 | **Details of Principal Officer** | Name: Sachin Kapoor | Contact No: 0120 - 4953325 | Mail ID: po@clovekwealth.com | **Details of Compliance Officer & Grievance Officer** | Name: Shubham Mathur | Contact No: 0120 - 4953325 | Mail ID: shubham.mathur@clovekwealth.com | **SEBI Local Office Address:** Eldeco Corporate Chambers II, 3rd Floor, Picup Bhawan Rd, Vibhuti Khand, Gomti Nagar, Lucknow, Uttar Pradesh - 226010

STANDARD WARNING: Investment in securities market is subject to market risks. Read all the related documents carefully before investing.

DISCLAIMER: Registration granted by SEBI, membership of BASL and certification from NISM in no way guarantee performance of the intermediary or provide any assurance of returns to investors.