

## INVESTMENT OBJECTIVE

Endeavor to consistently generate **ALPHA** by creating **bespoke portfolios** & investing in current & emerging leaders with a turnaround factor in common through **Turtle's quant-based investing process**.

## INVESTMENT APPROACH

We create **Bespoke portfolios**, tailoring each investment to meet specific client needs. Our investment decisions are guided by **Turtle's Quant Based Investment Process**, focusing on Data rather than Human Bias.

We continuously Select, Allocate, and Review investments through our Trademark **P.P.P. (Price, Profit, and People)** investment process.

With adhering to the following **NO's for our PMS:**

- **No Market Cap Bias**
- **No Sector Bias**
- **No Minimum Holding Bias**
- **No Model Portfolio Allocation**

## PRODUCT FEATURES:

**Compounding Benefits:** Enjoy the power of compounding on your investments.

**Bespoke Portfolio:** A tailored portfolio will be curated to match the risk tolerance of each investor

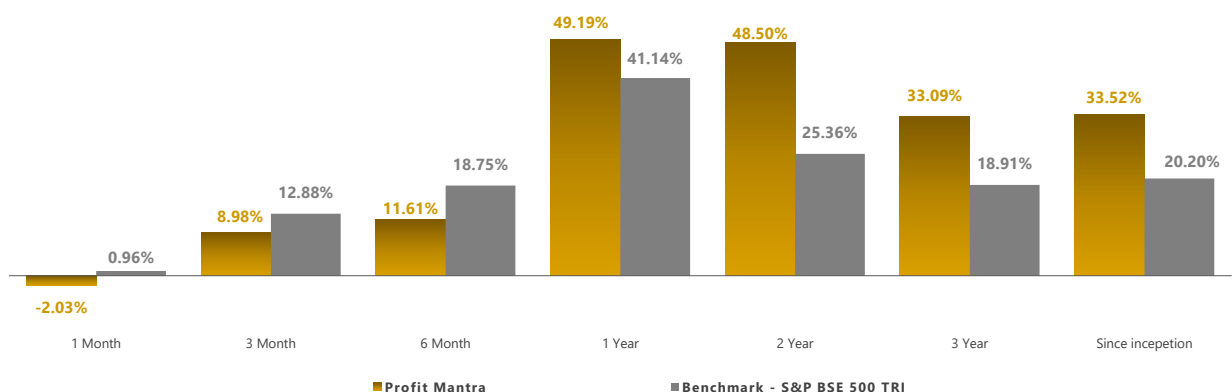
**FEES: 2% Flat Fees**

**MINIMUM INVESTMENT: ₹1 Crore**

**NO OF STOCKS: 25-30**

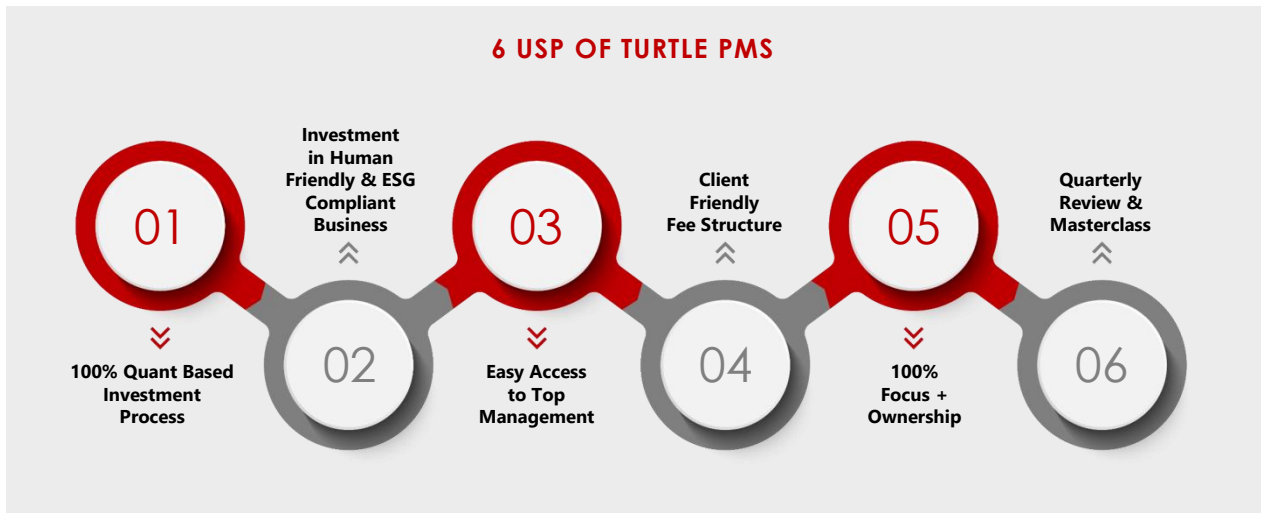
## PERFORMANCE CHART

PROFIT MANTRA PMS Fund VS S&P BSE 500 TRI

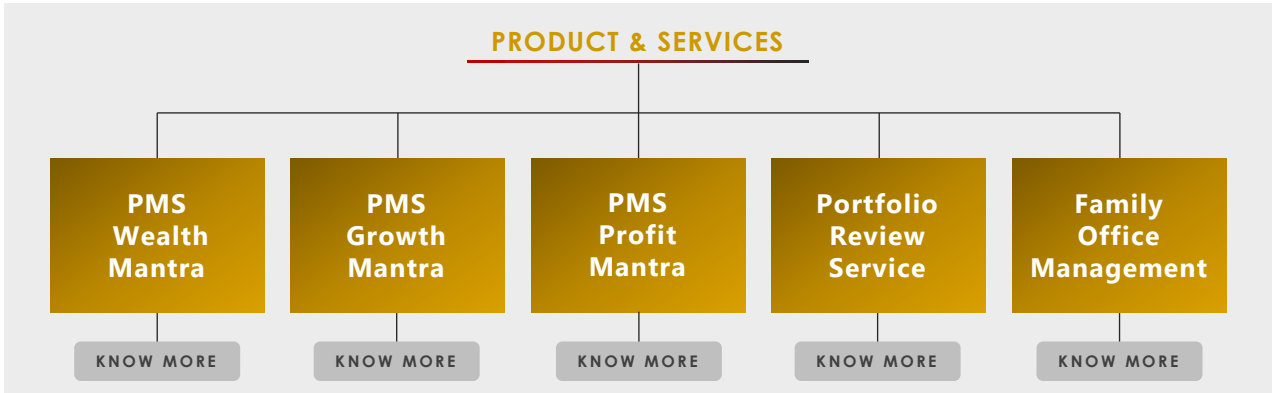


Performance Data is as on August, 31 2024. | Figures are Inclusive of Fees, Taxes and other charges. | Above performance data is not verified by SEBI | Past performance does not guarantee future returns. | SEBI Reg No: INP000006758 | For more details please visit <https://turtlewealth.in/>

## 6 USP OF TURTLE PMS



## PRODUCT & SERVICES



## 10 Reasons WHY you should NOT Invest with Turtle

[KNOW MORE](#)

### DISCLAIMER

Turtle Wealth Management Pvt. Ltd. (hereinafter referred to as "the Company") is a SEBI registered Portfolio Manager, SEBI Reg. No: INP000006758. The registered office of the Company is located at 1001, Rajhans Montessa, Dumas Road, near Airport, Surat, Gujarat 395007. The Company specializes in Portfolio Management Services (i.e. Discretionary and Advisory).

Investments in the securities market are subject to market risks, and there is no assurance or guarantee that the objectives of any investment portfolio will be achieved. Past performance is not indicative of future results. Above performance data is not verified by SEBI. It is important for investors to consider their financial condition, risk tolerance, and investment objectives before making any investment decisions. The content provided by the Company, including but not limited to reports, research materials, and presentations, is for informational purposes only and should not be construed as an offer to buy or sell securities, or a solicitation of an offer to buy or sell securities, in any jurisdiction where such an offer or solicitation would be considered illegal.

The Company has not been suspended, debarred, or barred from doing business by any Stock Exchange, SEBI, or any other regulatory authority, nor has its certificate of registration been cancelled at any point in time. Information provided by the Company, including percentage returns and performance data, may include simulated or back-tested results, which have inherent limitations and may not reflect actual trading or the effect of material economic and market conditions on decision-making processes.

Investors are advised to conduct their own investigations, consider all risk factors including their financial condition and suitability to risk-return profile, and seek independent professional advice before investing. The opinions expressed by the Company are based on current market conditions and are subject to change without notice. The Company and its associates, officers, directors, and employees may have positions or other interests in securities mentioned in materials provided by the Company.

This material is intended for the personal information of the authorized recipient only and is not for public distribution. It must not be reproduced or redistributed without the express written consent of the Company. The Company makes no representations or warranties regarding the accuracy or completeness of the information provided and accepts no liability for any loss arising from the use of this material. Investors are cautioned that forward-looking statements are not guarantees of future performance and are subject to change without notice.

\*For more information, please visit our website [www.turtlewealth.in](http://www.turtlewealth.in)