



Invest in India's
**TURNAROUND
BUSINESS**

Turtle's
**All – Season
Quantitative – PMS**

**"WHERE INVESTMENT DECISIONS ARE DRIVEN
BY DATA & PROCESSES, NOT BY INTUITION AND JUDGEMENTS."**

Inside The Presentation

01

ABOUT TURTLE
WEALTH

02

INVESTMENT
PROCESS

03

PRODUCTS
& SERVICES

01

About Turtle Wealth

“
At Turtle, our Core Purpose is to create Long Lasting Wealth in the most strategic way with the highest level of Probity, Discipline, and Transparency
”

OUR CORE VALUES



Shell to Success: The Story Behind Turtle Wealth

WHY NAME TURTLE

*We are Turtle,
not Tortoise,
we have Agility
with Longevity
and Inheritance
of Wealth and
Prosperity.*

VISION 2035

1. We are India's **Leading & Most Trusted** Brand In **WEALTH MANAGEMENT**
2. **10 YEARS x 10 WEALTH x 10 GROWTH**
3. We have **1Billion+\$AUM** With Innovative Investment Products
4. We have the **Best Workplace** In the Wealth Management Industry
5. We Are Adding Value to **Humanity**

Our Founders



CREATOR

GOD

Chief Result Officer



MAVERICK

ROHAN MEHTA
CEO & Fund Manager

MBA + 20 Years of
Experience in Investing &
Wealth Creation



VERSATILE

VIBHATI ARYA GANDHI
Chief Operating Officer

MBA (Finance) + 15 Years
of Experience in Equity
Operations.



THRIVING

HARDIK GANDHI
Chief Investment Officer

MBA (Finance) + 15 Years
of Experience in Equity
Market.

Portfolio Manager Profile

MBA with **20 Years**
of experience in Equity
Markets

Proficient in
Quant Investing,
generated more than **21%**
CAGR Returns

Author of **212°**
The Complete Trader



Managing more
than **636+ Cr. Funds**

Passionate for:
Spirituality, Stocks,
Squash & **Vision
Boards**

ROHAN MEHTA

CEO & FUND MANAGER OF TURTLE
WEALTH

Research Team



Sachi Shah

Sr. Research Analyst

Qualification: Cleared CFA (USA) Level II
Total Work Experience: 5 Years +



Kajal Jain

Sr. Research Associate

Qualification: MBA Finance, Cleared CFA (USA) Level I
Total Work Experience: 2 Years +



Muskan Kedia

Project Head

Qualification: BBA, MBA (Finance)
Total Work Experience: 4 Years +



Kirti Golicha

Research Analyst

Qualification: BBA, MBA (Finance)
Total Work Experience: 3 Years +



Jemish Naliyapara

Quant Strategist

Qualification: M.Sc. Physics
Total Work Experience: 1 Years



Harshraj Jadeja

Quant Research Analyst

Qualification: Cleared CFA (USA) Level II
Total Work Experience: 5 Years +



Bhumika Agarwal

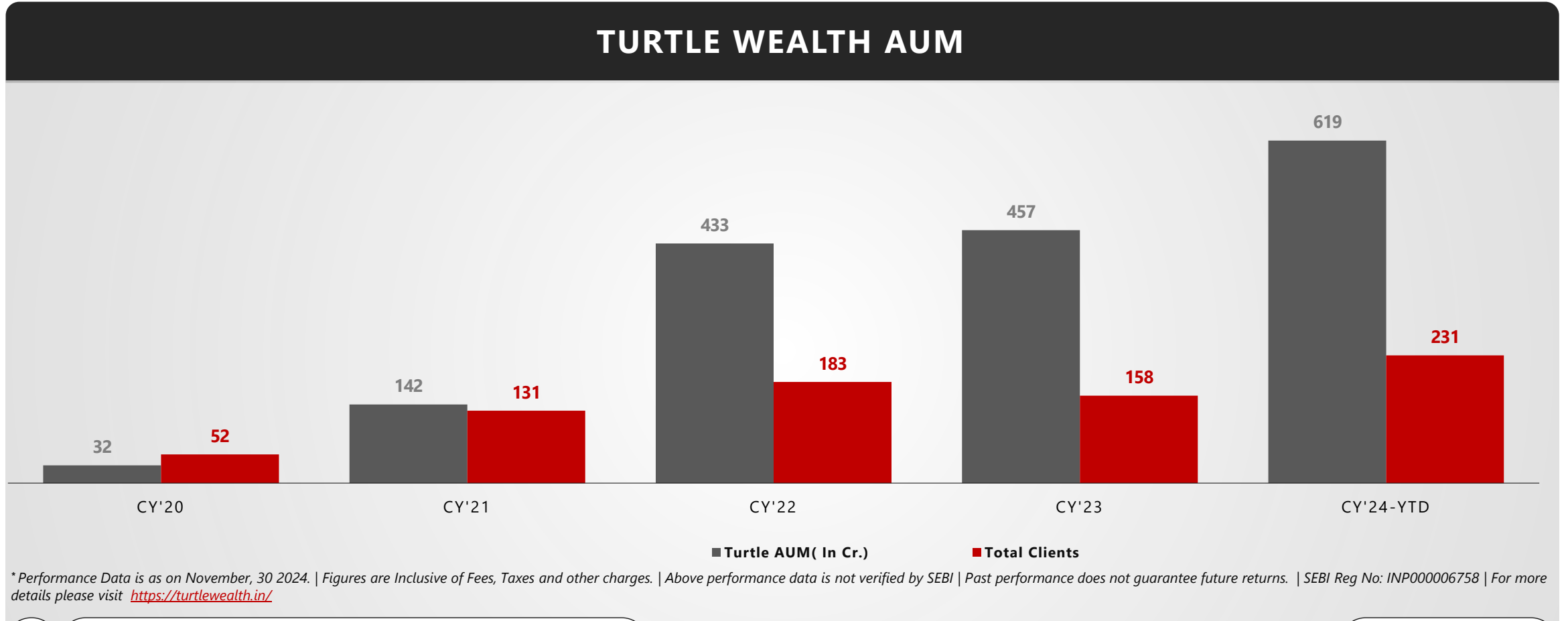
Jr. Research Analyst

Qualification: B.Sc. Finance
Total Work Experience: 1 Years

USP Of Turtle Wealth



Turtle Wealth - Asset Under Management



Our Achievements



TOP 10 PMS PERFORMANCE (year to date)			
AMC	Investment Approach	Category	YTD returns (up to Aug 31, 2024)
Pace Financial Investment Adviser	Tresor SKG	Multi Asset	69.38%
Wallfort PMS and Advisory Services	Diversified Fund	Small & Mid Cap	63.90%
Money Grow Asset	Small Midcap	Small & Mid Cap	59.16%
Turtle Wealth Management	Profit Mantra	Flexicap	54.83%
Green Lantern Capital	Growth Fund	Small & Mid Cap	50.03%
Stallion Asset	Core Fund	Multi Cap	48.93%
Valcreate Investment Managers	IME Digital Disruption	Thematic	45.25%
Moat Financial Services	UpperCrust Wealth Fund	Multi Cap	44.32%
NAFA Asset Managers	Clean Tech Portfolio	Mid Cap	41.84%
Green Portfolio	The Impact ESG Fund	Thematic	41.47%

Source: PMS Bazaar; Data as of August 2024



SMALLCAP ADVANCES; MIDCAP TRADES FLAT

NTPC
443.70
Day's High: 447.75
Day's Low: 442.10
0.70
0.16%
Vol: 7.23 m

Godrej Prop: Approves Fund Raise For ₹6,000 Cr Via Debt, Equity

Godrej Prop
3191.40 ▲ 0.83%

Hot Money NTPC ARM SIGNS MoU WITH RAJASTHAN GOVT

STOCKS IN NEWS

MARKET ACTION

Nifty Midcap 150: 22310.65 ▼ -0.01%

Nifty Smallcap 250: 18500.05 ▲ 0.49%

USD-INR: 89.35 ▲ 0.0175

NDTV Profit

83.8100 ▲ 0.0175

I.T. BIGGIES LEAD NIFTY RALLY



Ask Profit SEND STOCK-RELATED QUERIES ON WHATSAPP AT 8169443399

TOPNEWS

AIRBUS

- Sets sales record in 2023 amid surging aircraft demand
- Read more on www.ndtvprofit.com

Forbes INDIA

RUSSIAN GAMBIT



Forbes INDIA

Making Rich, WEALTHY



02

Investment Process

Core Purpose:

To generate Alpha through a Quantitative Investment approach, ensuring that every decision is data-driven and without any human biases.

Selection

Allocation

Review

Turtle's PPP™ Investment Process

PRICE



- Stocks at **ATH Price**
- **Outperformance at ATH**
- Deciding **EXIT** before **ENTRY**

PROFITS



- Profits at **ATH**
- **Turnaround Businesses**

PEOPLE



- **Meeting Management**
- **Scuttlebutt Research**
- **Due Diligence**

Turtle Quant: Built for All Seasons

NO SECTOR BIAS

Invest in sectors showing a clear turnaround.

NO MARKET CAP BIAS

Shift between market caps when one leads the market.

NO AVERAGING LOSER

Exit underperformers of the market swiftly.

NO IF INVESTING

No hypothetical investing—invest in what's working now, not what might work in the future.

NO MARKET TIMING

Invest in top performers at any time, regardless of market conditions.

NO BLIND RISK-TAKING

Avoid concentrated bets; maintain a balanced approach to minimize impact when things don't work out.

Features of Turtle Quant Process

Investment happens only in



Turnaround & High Valued Business



Top 750 Companies of India



All- Time High Profit-Making Business



EXIT (Downside) is decided before ENTRY



Portfolio Allocation based on Risk Parameters

Investment only in Human Friendly Businesses

As we will avoid buying businesses which are in following business:



Animal Killing



Liquor - Tobacco



Leather Making



Hotels and Casinos



Non ESG Compliant

02

Turtle's Stock Selection Process

“Don't SELL North,
Don't HOLD South,
REPLACE East & West!”™

- Rohan Mehta

Turtle's Stock Selection Process

01



*All Time High
Price*

02



*All Time High
Profits*

03



*All Time High
Outperformance*

04



*Turnaround
Story*

05



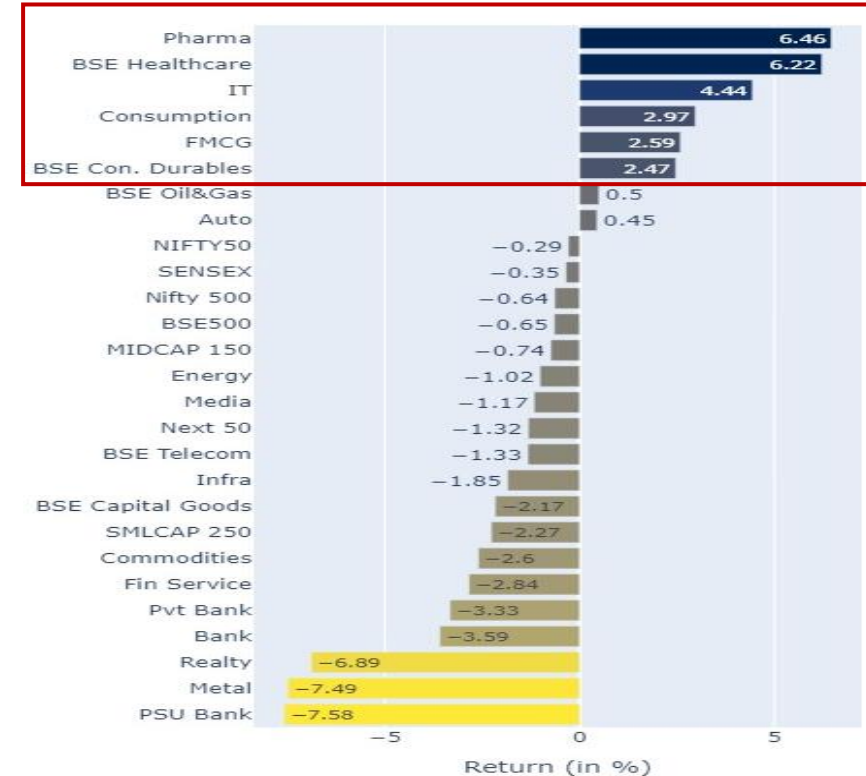
*Pre-Decided
Exit*

Turtle's Stock Selection Process – SCORING PROCESS

Daily Stock Prospect List	
STOCKS	SCORES
PHARM COMPANY*	3
PHARM COMPANY*	3
PHARM COMPANY*	3
PHARM COMPANY*	3
CONSUMER DURABLES COMPANY	3
CONSUMPTION COMPANY	3

FILTERS	SCORE	NOTE
ATH PRICE	1	HOLDING
ATH PROFIT	1	PROSPECT
ATH OUTPERFORMANCE	1	REJECTED

Indices Outperformance (MoM)



SIMPLIFY QUANTS.

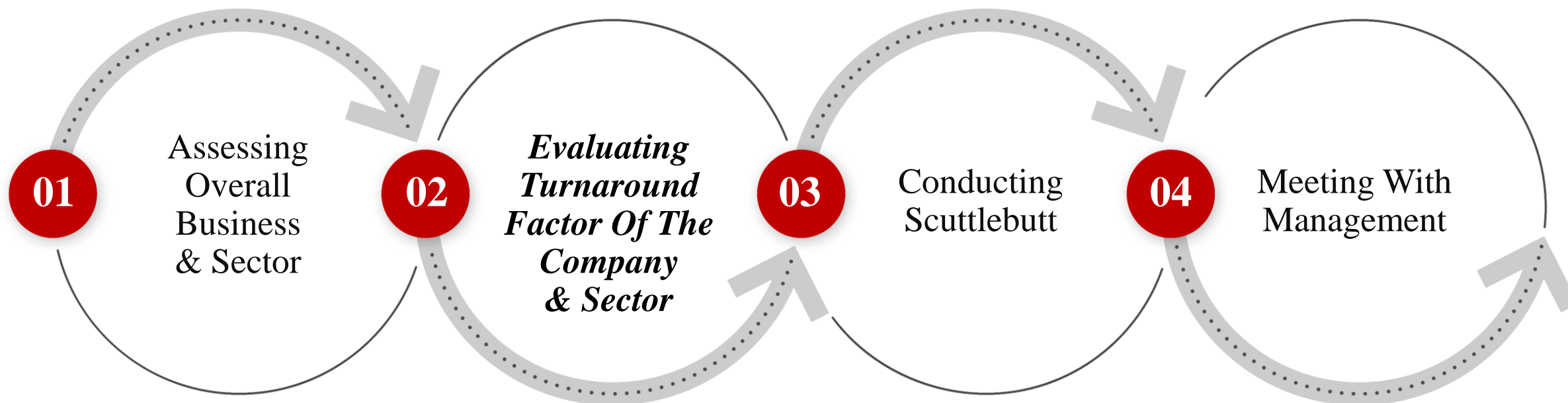
*ATH Price
ATH Profit
ATH Outperformance*

*Each Parameter accounts for 1 score.
We take Companies that score 3 for further research.*

Selection list:

stocks from current trending sectors + highest market outperformers

Turtle's Stock Selection Process – **TURNAROUND STORIES**



Turtle's Stock Selection Process - FINANCING COMPANY

STEP 1:
ALL Time High Stock after a long Consolidation

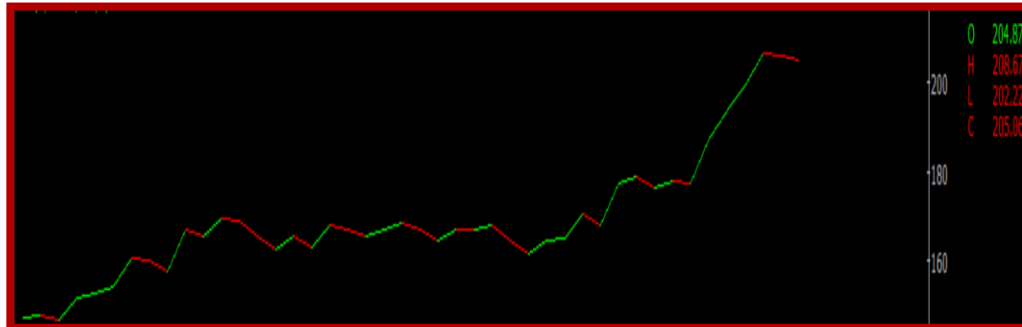


STEP 4:
VALUE VS PRICE (1/2)

STEP 2: ALL Time High Profit

FINANCE COMPANY	MAR -14	MAR -15	MAR -16	MAR-17	MAR-18	MAR-19	MAR-20	MAR-21	MAR-22	MAR-23	MAR-24
NET PROFIT (CRORE)	5,462	6,004	6,184	2,236	8,797	12,640	9,477	15,716	18,768	21,719	26,461

STEP - 3
Outperformance To BSE500

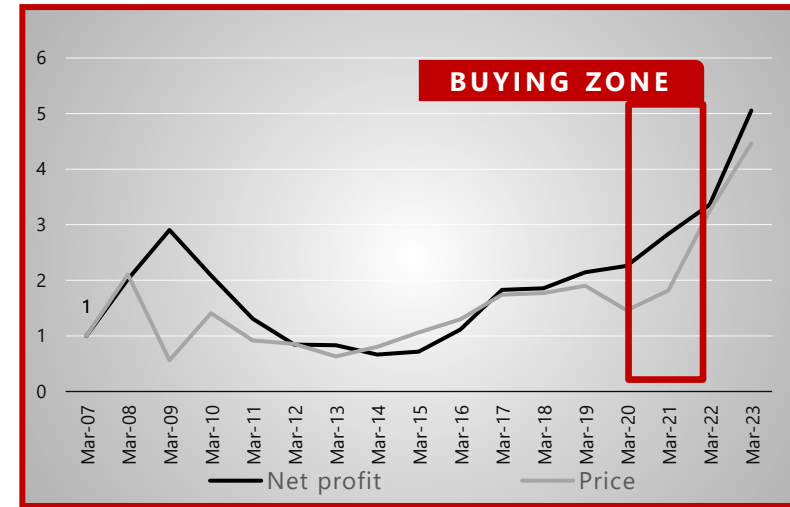


- Government initiatives boosting power generation and transmission capacities.
- Largest lender and the financial backbone of the Indian power sector.

STEP 5:
Turnaround Story (Examples)

Turtle's Stock Selection Process — TRANSFORMER MANUFACTURING COMPANY

STEP 1:
ALL Time High Stock after a long Consolidation

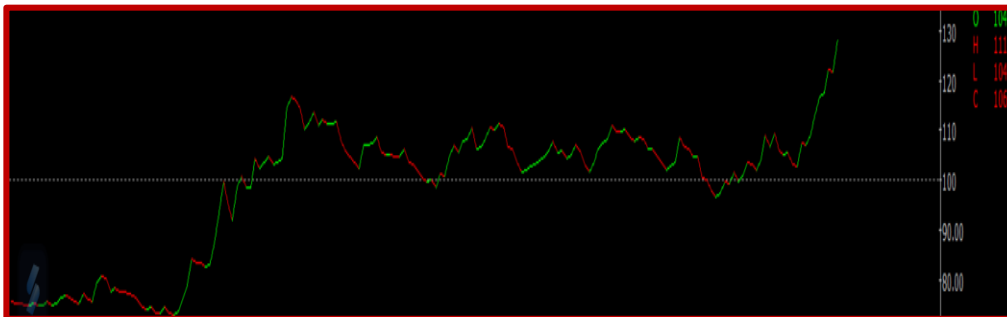


STEP 4:
VALUE VS PRICE (1/2)

STEP 2: ALL Time High Profit

FINANCE COMPANY	MAR -14	MAR -15	MAR -16	MAR-17	MAR-18	MAR-19	MAR-20	MAR-21	MAR-22	MAR-23	MAR-24
NET PROFIT (CRORE)	26	28	44	72	73	85	89	112	133	200	307

STEP - 3
Outperformance To BSE500

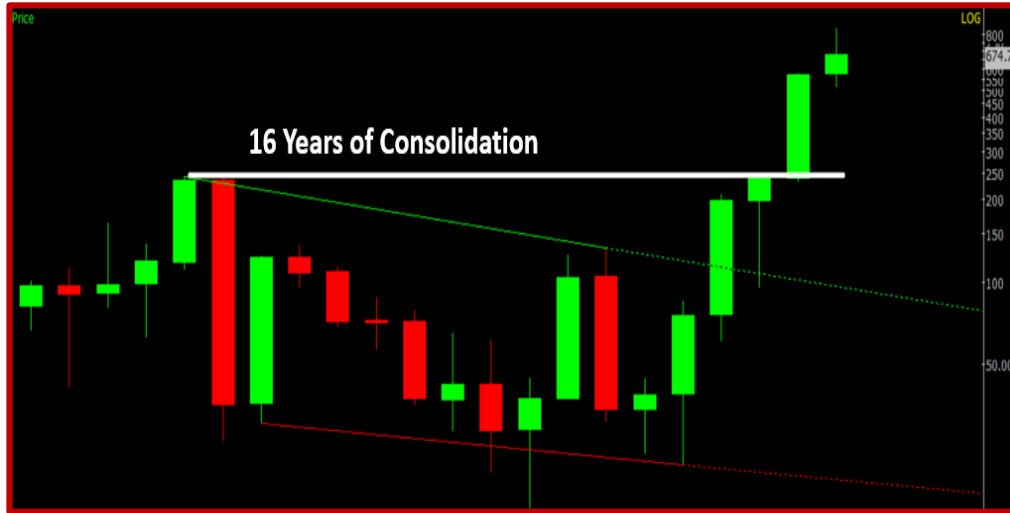


- Increasing power demands and infrastructure growth in India.
- Power sector reforms boosting the transformer industry.

STEP 5:
Turnaround Story (Examples)

Turtle's Stock Selection Process — STAINLESS STEEL MANUFACTURING COMPANY

STEP 1:
ALL Time High Stock after a long Consolidation

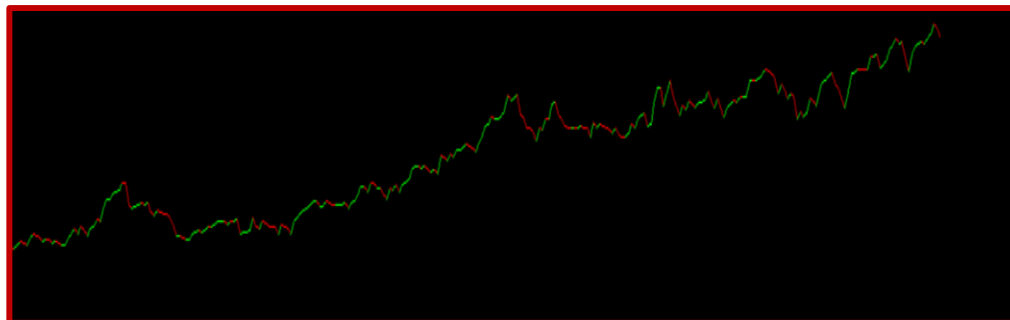


STEP 4:
VALUE VS PRICE (1/2)

STEP 2: ALL Time High Profit

FINANCE COMPANY	MAR -14	MAR -15	MAR -16	MAR-17	MAR-18	MAR-19	MAR-20	MAR-21	MAR-22	MAR-23	MAR-24
NET PROFIT (CRORE)	-1,367	253	-556	83	346	145	73	419	3,109	2,084	2,693

STEP - 3
Outperformance To BSE500



- Industry tailwinds in stainless steel.
- Dominates over 50% of domestic market share, far outpacing competitors.

STEP 5:
Turnaround Story (Examples)

Turtle's Stock Selection Process — OIL & GAS COMPANY

STEP 1:
ALL Time High Stock after a long Consolidation

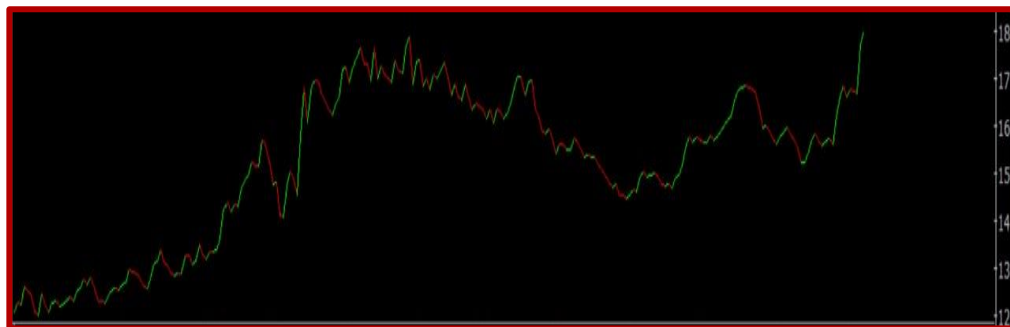


STEP 4:
VALUE VS PRICE (1/2)

STEP 2: ALL Time High Profit

FINANCE COMPANY	MAR -14	MAR -15	MAR -16	MAR-17	MAR-18	MAR-19	MAR-20	MAR-21	MAR-22	MAR-23	MAR-24
NET PROFIT (CRORE)	2,990	2,608	2,080	1,597	2,735	3,238	5,005	4,146	6,719	9,854	6,980

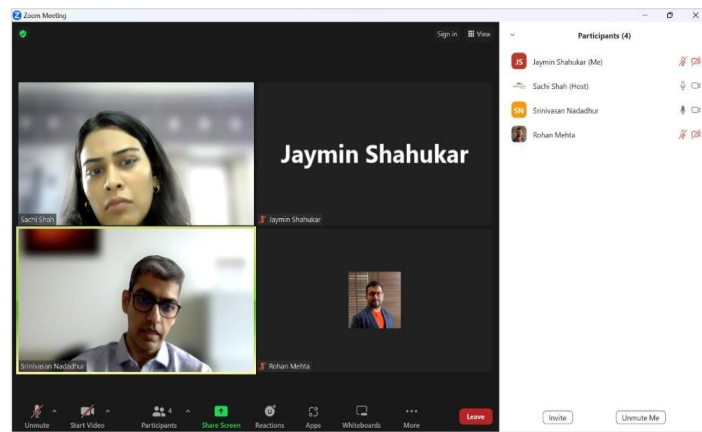
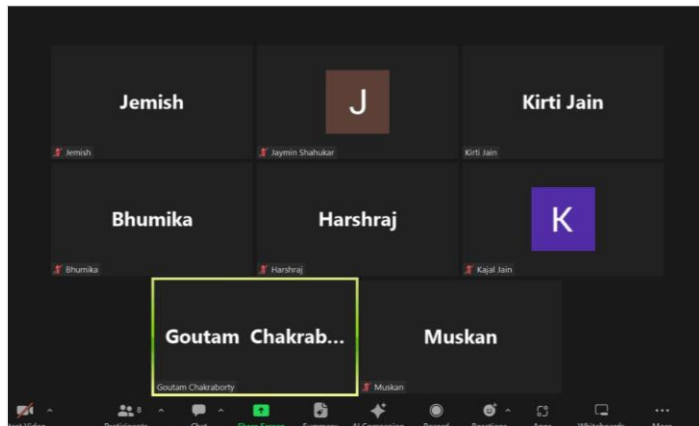
STEP - 3
Outperformance To BSE500



- India's economic growth is closely related to its energy demand, therefore, the need for oil and gas is projected to increase.
- Oil demand in India is projected to register a 2x by 2045.

STEP 5:
Turnaround Story (Examples)

Management Meets



02

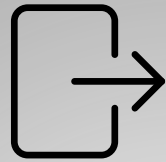
Turtle's Allocation Process

**"It's not what you buy,
but
it's how much you Buy"
- Rohan Mehta**

Quantitative Allocation Process



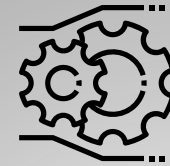
Risk per Stock
= Max of 1.2%
of Invested
Value



Deciding Exit
before we enter



No Model
Allocation
Approach



Allocation
based on the
Risk Approach,
is purely
dynamic



Re allocation
of stock is also
based on
Quants

Turtle Risk Management Framework for Allocation

CLIENT CODE	001	%	Per stock RISK	Total Portfolio
INVESTMENT	₹ 1,00,00,000.00	100	₹ 1.20	₹ 18,00,000.00
INVESTED	₹ 70,10,228.75	70.10		
CASH	₹ 29,89,771.25	29.90		
RISK	₹ 18,00,000.00	18.00		

RISK	INVEST	RISK_INR
18.00	₹ 70,10,228.75	₹ 18,00,000.00

DATE	SCRIPT	SYSTEM	RISK	ENTRY	EXIT	QUANTITY	RISK%	INV_VALUE	WEIGHTS
08-05-2024	Stock 1	PPP	₹ 1,20,000.00	9923.40	7000.00	41	29.46	₹ 4,07,336.66	4.07%
08-05-2024	Stock 2	PPP	₹ 1,20,000.00	350.90	250.00	1189	28.75	₹ 4,17,324.08	4.17%
08-05-2024	Stock 3	PPP	₹ 1,20,000.00	1482.65	1200.00	425	19.06	₹ 6,29,464.00	6.29%
08-05-2024	Stock 4	PPP	₹ 1,20,000.00	542.30	300.00	495	44.68	₹ 2,68,576.15	2.69%
08-05-2024	Stock 5	PPP	₹ 1,20,000.00	4302.65	2300.00	60	46.54	₹ 2,57,817.39	2.58%
08-05-2024	Stock 6	PPP	₹ 1,20,000.00	564.40	400.00	730	29.13	₹ 4,11,970.80	4.12%
08-05-2024	Stock 7	PPP	₹ 1,20,000.00	816.20	500.00	380	38.74	₹ 3,09,753.32	3.10%
08-05-2024	Stock 8	PPP	₹ 1,20,000.00	3703.65	3000.00	171	19.00	₹ 6,31,617.99	6.32%
08-05-2024	Stock 9	PPP	₹ 1,20,000.00	2861.70	1600.00	95	44.09	₹ 2,72,175.64	2.72%
08-05-2024	Stock 10	PPP	₹ 1,20,000.00	12846.85	10000.00	42	22.16	₹ 5,41,518.52	5.42%
08-05-2024	Stock 11	PPP	₹ 1,20,000.00	323.05	250.00	1643	22.61	₹ 5,30,677.62	5.31%
08-05-2024	Stock 12	PPP	₹ 1,20,000.00	503.45	400.00	1159	20.56	₹ 5,83,544.18	5.84%
08-05-2024	Stock 13	PPP	₹ 1,20,000.00	321.45	250.00	1679	22.23	₹ 5,39,874.04	5.40%
08-05-2024	Stock 14	PPP	₹ 1,20,000.00	843.90	700.00	834	17.05	₹ 7,03,738.71	7.04%
08-05-2024	Stock 15	PPP	₹ 1,20,000.00	86.58	66.00	5831	23.77	₹ 5,04,839.65	5.05%

Investing In Outperformers



Investing in the **top-performing** leaders within Auto sectors.

Investing In Outperformers



Investing in the **top-performing** leaders within Banking sectors.

02

Turtle Review Process

“
You've got to know when to **HOLD**,
Know when to **FOLD**,
Know when to **WALK AWAY**,
And know when to **RUN**
— Kenny Rogers”

Turtle Review Process

WM HOLDING STOCKS AS ON MAY 2024

STOCKS	SCORES
STOCK - 01	3
STOCK - 02	3
STOCK - 03	3
STOCK - 04	3
STOCK - 05	3
STOCK - 06	3
STOCK - 07	3
STOCK - 08	3
STOCK - 09	3
STOCK - 10	3
STOCK - 11	2
STOCK - 12	2
STOCK - 13	2
STOCK - 14	1
STOCK - 15	0
CONDITIONS	
STOCK ABOVE TURTLE EXIT PRICE	1
ATH TTM PROFIT	1
OUTPERFORMANCE at ATH	1

EXIT DECISION PROCESS

SCORES	ACTION
3	HOLD
2	REVIEW
1	REPLACE
0	EXIT

Past Exit – SPECIALITY FLUOROCHEMICAL COMPANY



Price < Long term Average

Drop in Profits

Underperformance to Benchmark

Past Exit – SPECIALITY CHEMICAL COMPANY



Price < Long term Average

Drop in Profits

Underperformance to Benchmark

Past Exit – CONSTRUCTION MATERIAL MANUFACTURING COMPANY

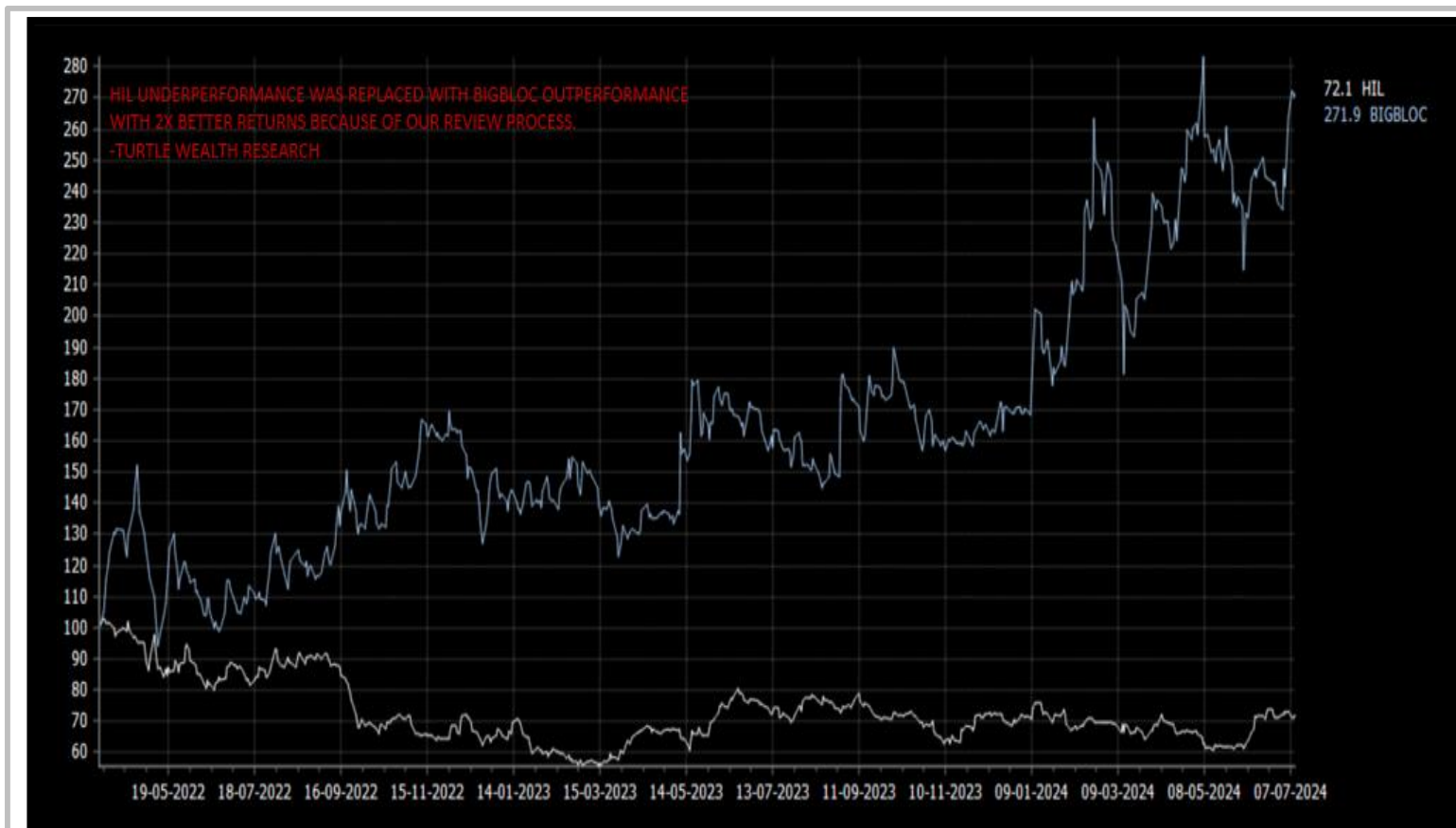


Price < Long term Average

Drop in Profits

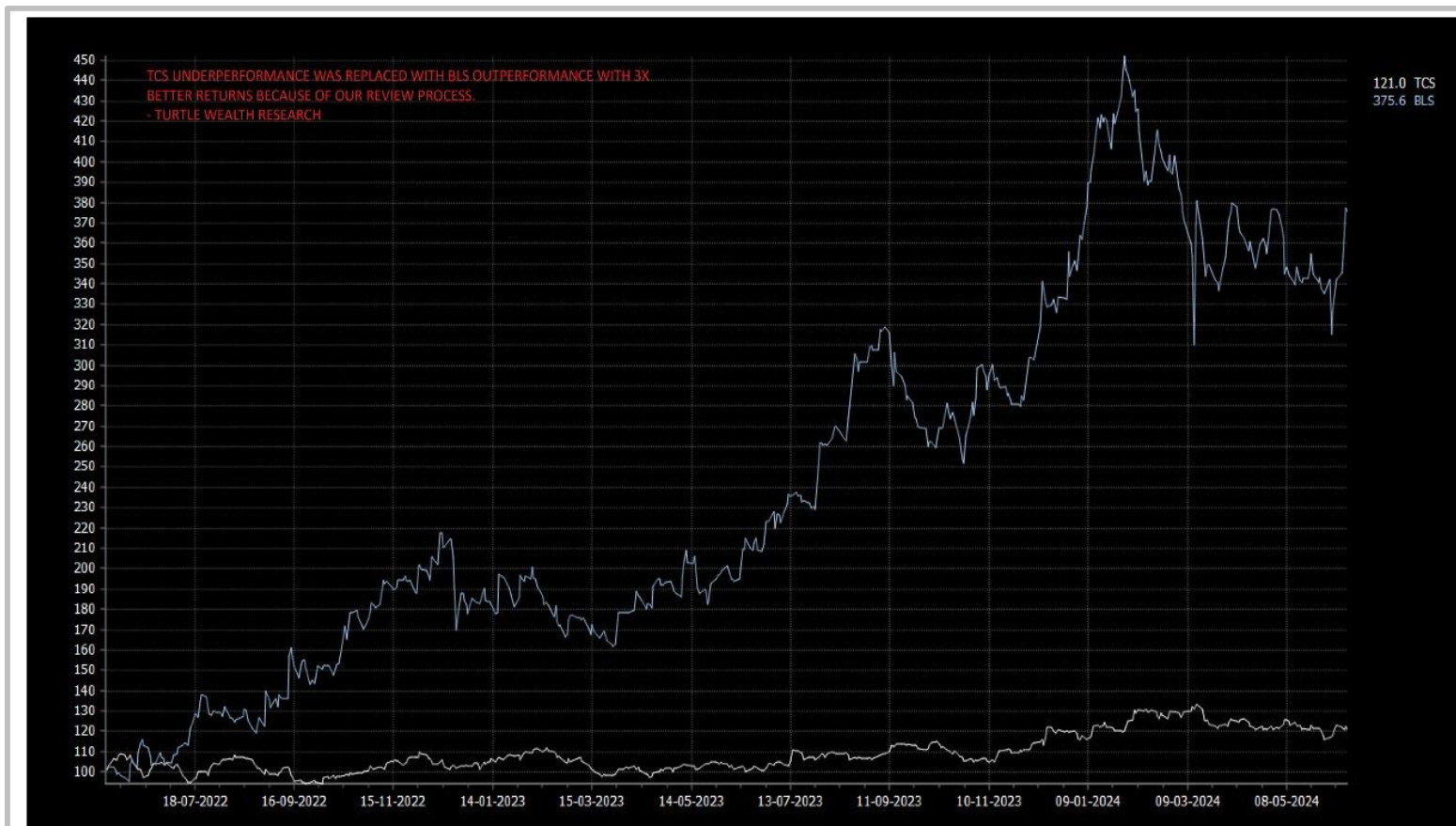
Underperformance to Benchmark

Strategic Swap: For 2x Returns By Replacing Underperformers



HIL Underperformance was replaced with **BIGBLOC** with 2X better returns because of **Turtle's Review Process**

Strategic Swap: For 3x Returns By Replacing Underperformers



TCS Underperformance was replaced with **BLS International** with 3X better returns because of **Turtle's Review Process**

03

Products & Services

Core Purpose

We endeavor to make the most Investor Friendly Products & Services, where Clients Win is Top Priority.

Product & Services



Portfolio Management Services

We endeavour to create 10x Wealth in 10 Years with a CAGR of 25%+ with our Turtle Quant Process.

[Know More](#)



Portfolio Review Services

Get your Investment Portfolio Checkup, professionally backed by logic, not emotions!

[Know More](#)



Family Office Management

Appoint a CIO who works for the overall development of your Family Goals and Objectives under one Umbrella.

[Know More](#)

Comparison - PMS Schemes

Point Of Difference	<u>Wealth Mantra PMS</u>	<u>Growth Mantra PMS</u>	<u>Profit Mantra PMS</u>
Investment Rational	Curated for Investors Looking for Leader Companies with Low Volatility.	Curated for Investors Looking for High-Growth and Emerging Leader Companies with a Pinch of Volatility.	BESPOKE Investment in Leader & Emerging Leaders. Seeking personalized investment solution. ❖ Direct Access to the Fund Manager ❖ Priority Access to Special Situation Opportunity
Investment Strategy	Turtle's Quant – Based	Turtle's Quant – Based	Turtle's Quant – Based
Minimum Investment	50 Lakh	50 Lakh	5 Cr.
Risk Profile	Balanced	High	Elevated
Number of stocks (Max.)	15-20	15-20	30
Exit Load	Nil	Nil	Nil
Fees	<ul style="list-style-type: none"> ➤ Below 1cr. 2% Fixed ➤ Above 1cr. 1% Fixed + 10% Profit Sharing at EOC (End of the Contract) ➤ Fixed Fees charged Will be adjusted against Profit sharing amount at the time of any redemption. 	<ul style="list-style-type: none"> ➤ Below 1cr. 2% Fixed ➤ Above 1cr. 1% Fixed + 10% Profit Sharing at EOC (End of the Contract). ➤ Fixed Fees charged Will be adjusted against Profit sharing amount at the time of any redemption. 	0.5% Fixed Fee + 10% Profit Sharing at EOC (End of the Contract)

*All the above Fees are exclusive of 18% GST.

Investment Summary Reports



TURTLE WEALTH MANAGEMENT PRIVATE LIMITED



Investment Summary As on 31-Jul-2024

Amount in (₹)

OFIN Code :

GROWTH MANTRA FUND

Portfolio Summary

Date Of Inception	26/09/2022
Initial Investment (Cash/Stocks)	12,500,000
Additional Investment (Cash/Stocks)	36,881,000
Withdrawal (Cash/Stocks)	-71,592
Net Capital	49,309,408
Realised Gain/Loss	178,649
Unrealized Gain	43,678,594
Other Income Received	829,434
Fees & Expense	-917,053
Market value of Investment	93,079,031

Portfolio Allocation

Asset Class	Market Value	% Asset
Equity	89,083,654	95.71%
Exchange Traded Fund	3,669,599	3.94%
Receivable	67,718	0.07%
Cash and Equivalent	258,060	0.28%
Current Portfolio Value	93,079,031	100%

Portfolio Performance

Particulars	MTD	QTD	YTD	Since Inception
% Returns (Absolute) on WA Capital	10.65%	10.65%	33.47%	129.65%
% Returns (Absolute) on TWRR	10.65%	10.65%	33.47%	93.02%
% Returns on XIRR	10.62%	10.62%	33.36%	145.20%
S and P BSE 500 Total Return Index	4.44%	4.44%	16.62%	58.41%

*Auto-generated report will be shared via email on a monthly basis.

Detailed Stock Portfolio Report



Detailed Portfolio Report

As on 31-Jul-2024

Amount in (₹)

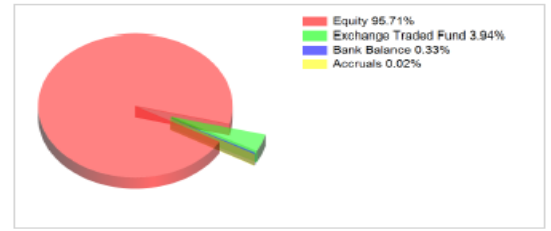
GROWTH MANTRA FUND

Date of Investment : 26-Sep-2022

Asset Class	Item Description	ISIN	Quantity	Unit Cost	Total Cost	Market Price	Market Value	Unrealized Gain	Holding %	% Gain To Cost
Equity										
			5,313	529.5948	2,813,737.17	829.60	4,407,664.80	1,593,927.63	4.735 %	56.65 %
			495	3,094.0129	1,531,536.39	4,621.35	2,287,568.25	756,031.86	2.458 %	49.36 %
			2,083	1,602.8431	3,338,722.18	1,626.30	3,387,582.90	48,860.72	3.639 %	1.46 %
			1,237	2,035.1898	2,517,529.78	4,565.20	5,647,152.40	3,129,622.62	6.067 %	124.31 %
			36,746	139.3783	5,121,594.77	265.97	9,773,333.62	4,651,738.85	10.500 %	90.83 %
			4,662	339.0480	1,580,641.89	1,122.90	5,234,959.80	3,654,317.91	5.624 %	231.19 %
			3,140	747.8527	2,348,257.35	1,387.65	4,357,221.00	2,008,963.65	4.681 %	85.55 %
			4,980	523.6362	2,607,708.28	608.80	3,031,824.00	424,115.72	3.257 %	16.26 %
			4,200	530.4751	2,227,995.42	609.30	2,559,060.00	331,064.58	2.749 %	14.86 %
			66	15,352.9805	1,013,296.71	15,634.15	1,031,853.90	18,557.19	1.109 %	1.83 %
			7,747	329.7634	2,554,676.84	914.90	7,087,730.30	4,533,053.46	7.615 %	177.44 %
			10,407	280.4881	2,919,039.34	357.95	3,725,185.65	806,146.31	4.002 %	27.62 %
			31,725	207.9716	6,597,899.13	577.55	18,322,773.75	11,724,874.62	19.685 %	177.71 %
			352	7,562.6687	2,662,059.38	11,044.85	3,887,787.20	1,225,727.82	4.177 %	46.04 %
			1,413	1,157.8781	1,636,081.82	2,531.00	3,576,303.00	1,940,221.18	3.842 %	118.59 %
			572	2,890.0544	1,653,111.09	13,506.70	7,725,832.40	6,072,721.31	8.300 %	367.35 %
			192	12,208.8144	2,344,092.36	15,832.40	3,039,820.80	695,728.44	3.266 %	29.68 %
Total :					45,467,979.90		89,083,653.77	43,615,673.87	95.71 %	95.93 %
Exchange Traded Fund										
			1,694	1,000.0000	1,693.80	999.99	1,693.78	-0.02	0.002 %	0.00 %
			44,818.000	80.4361	3,604,985.13	81.84	3,667,905.12	62,919.99	3.941 %	1.75 %
					3,606,678.93		3,669,598.90	62,919.97	3.94 %	1.74 %
Bank Balance										
BALANCE WITH BANKS					307,298.63		307,298.63	0.00	0.330 %	0.00 %
Total :					307,298.63		307,298.63	0.00	0.33 %	0.00 %
Accruals										
CUSTODY/DP/OTHER CHARGES PAYABLE							-49,238.16	-49,238.16	-0.053 %	
DIVIDEND RECEIVABLE					67,718.30		67,718.30		0.073 %	
Total :					18,480.14		18,480.14		0.02 %	0.00 %
Grand Total :					49,400,437.60		93,079,031.44		100.00 %	

Investable Surplus	Amount
Custody/DP/Other Charges Payable	(49,238)
Balance with Banks	307,299
Net Investible Surplus	258,060

Investment Summary	Amount
Cost of Current Portfolio	49,400,438
Realized Gain / (Loss) on Investment	178,649
Account Related Income/(Expenses)	(87,620)
MTM on Derivatives Trades	0
Total Cost of Investment	49,309,408
Current Value of Investment	93,079,031



PMS Fees Calculation



TURTLE WEALTH MANAGEMENT PRIVATE LIMITED



Fee Detail
For the period to

Amount (₹)

WEALTH MANTRA FUND

OFIN Code:

OFIN Code	Calculation Date	Posting Date	Document No.	Net Asset Value	Management Fee %	Fee Inclusive of GST
00020120	23-Sep-2024	30-Sep-2024	FEES-0000261704	5,355,908.04	2.360	346.29
00020120	24-Sep-2024	30-Sep-2024	FEES-0000261704	5,373,063.74	2.360	347.40
00020120	25-Sep-2024	30-Sep-2024	FEES-0000261704	5,372,869.57	2.360	347.39
00020120	26-Sep-2024	30-Sep-2024	FEES-0000261704	5,403,105.52	2.360	349.35
00020120	27-Sep-2024	30-Sep-2024	FEES-0000261704	5,409,836.07	2.360	349.79
00020120	28-Sep-2024	30-Sep-2024	FEES-0000261704	5,409,836.07	2.360	349.79
00020120	29-Sep-2024	30-Sep-2024	FEES-0000261704	5,409,848.23	2.360	349.79
00020120	30-Sep-2024	30-Sep-2024	FEES-0000261704	5,373,137.83	2.360	347.42
Total Management Fees(Inclusive of GST)						46,566.24

PMS Fund Details

MINIMUM INVESTMENT	50 Lakhs
NO. OF STOCKS	Max 18
PORTFOLIO MANAGER	Mr. Rohan Mehta
BENCHMARK	BSE 500 TRI
CUSTODIAN	Orbis Financial Corporation Limited
AUDITOR	SecMark Consultancy Limited

BACK-OFFICE SUPPORT

Name : Chirag Shah
 Mobile : +91 78742 46790
 Email : info@turtlewealth.in

PMS REGISTRATION DETAILS

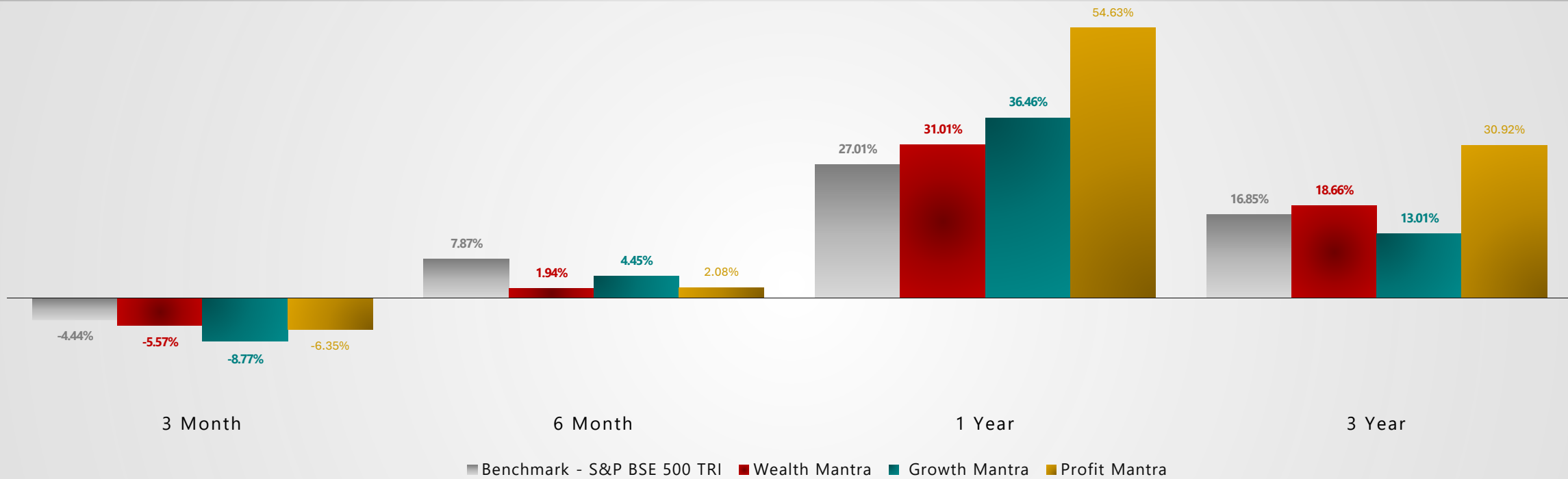
PMS Registered Under : SEBI
 PMS Registration Number : INP00006758

BENEFITS

- Dedicated web login to monitor your portfolio
- Dedicated service manager & business coordinator for queries
- Audited statement at the end of the year

Turtle Wealth PMS Fund Performance

TURTLE WEALTH PMS VS BSE 500 TRI



* Performance Data is as on November, 30 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/>

Value Added Services



01

**Investing
Masterclass**



02

**WhatsApp Investor
Community**



03

**Entry & Exit
Note of Stocks**



04

**PMS Quarterly
Review**



05

**Dedicated
Service Manager**



06

**Digital
Onboarding**



07

**Quarterly Result
Update With
Commentary**



08

**We love our
Clients more than
our Companies**

Portfolio Review Services

Get your Investment
Portfolio Checkup,
Professionally!

*You've got to
know when to HOLD,
Know when to FOLD,
Know when to WALK AWAY,
And know when to RUN*

- **KENNY ROGERS**
- **THE GAMBLER**



Turtlewealth[®]
beyond profits...

Customize
**PORTFOLIO
REVIEW SERVICES**

2 WORKING DAYS
PORTFOLIOS ONLY ABOVE 50 LAKH

For disclaimer visit:
www.turtlewealth.in

SEBI Registration no. Portfolio Manager: INP000006758

Portfolio Review Video

Media Coverage Highlights



Reasons WHY you should NOT Invest with Turtle

1.

If your investment horizon is **lesser than 2100 Days**, you should not invest

2.

If you can't see your portfolio **Down by 21%**, you should not invest

3.

If you expect **High returns** before 1000 days of investment, you should not invest.

4.

If you have **taken loan/bank CC** and doing investments to get the difference of returns, you should not invest.

5.

If your love for **Profits** is higher than the **Process** or **Quality of Business** we have invested, you should not invest.

6.

If you expect we will **ALWAYS** be in profits and **ALWAYS** outperform the benchmark, you should not invest.

7.

If you can't wait for last **20%** of the time for **80%** of the returns, you should not invest

8.

If you expect we will **always** outperform Interest rates every month, and every year there would be profits, you should not invest.

9.

If you are going to continuously compare Our Portfolio with other or different Asset class, you should not invest.

10.

If any of this point you **don't** agree, on a serious note you should not invest with us.

Corporate Social Responsibility – CSR

VISION BOARD

*We help people dive
into an incredible
World of self-discovery
& Personal Growth*



Invest with Us

TURTLE WEALTH HEAD OFFICE

1001, Rajhans Montessa
Dumas Road, Magdalla
Surat , Gujarat 395007

E: contact@turtlewealth.in

M: +91 9510569934

GET IN TOUCH

Also find us social media below



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).

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*The exit point mentioned here is from the current perspective and may change depending on market conditions, stock results, and other sector-specific news. The exit point may be higher or lower than the given price, depending on the situation.

For further details, please visit <https://turtlewealth.in>.