



1st Sep-2021

Portfolio Examination/Re-Construction/Advisory:

What you'd get?

- Review of your existing portfolio
- Analysis of your portfolio according to your risk profile
- Shuffle of stocks to meet your targets
- Monthly review of newly made portfolio
- Advice on buy/sell/reduce/add as and when needed or indicated
- 25% - 50% target return in the portfolio depending on beta and market conditions
- Investment period of 2 – 5 years (long-term)
- Recommendations via SMS and Email on real-time basis
- Follow up with all important news & information updating
- Dedicated support person
- Direct touch with Research Analysts

➔ Fee:

1. **Fixed Fee** as following:
 - A. Upto INR5 Lacs Portfolio, INR 20,000/- p.a.
 - B. 5.1 Lacs to 10 Lacs Portfolio, INR 25,000/- p.a.
 - C. 10.1 Lacs to 15 Lacs Portfolio, INR 30,000/- p.a.
 - D. 15.1 to 20 Lacs Portfolio, INR35,000/- p.a.
 - E. 20.1 Lacs to 25 Lacs, INR 40,000/- p.a.
 - F. 25.1 Lacs to 30 Lacs, INR45,000/- p.a.
 - G. 30.1 Lacs to 35 Lacs , INR50,000/- p.a
 - H. 35.1 Lacs to 70 Lacs, 1.5% of (portfolio size) p.a.
 - I. Above 70 Lacs – the fixed fee can be discussed
2. **Profit Sharing** of 20% above and beyond 10%** p.a. (i.e. 5% in six months). Profit Sharing would be done Bi-annually, (every six months); For instance at ten lacs rupees (INR10,00,000/-) if you made 2.0 lac profit in six months, then profit sharing fee will be – $20\% * [2,00,000 - (5\% * 10,00,000)] = \text{INR}30,000$
3. The Fixed Fee of INR20,000 to 50,000/- (depending on various portfolio size as mentioned in point 1) would be charged when you (the investor) have accrued profit of [at least equal to the fixed fee charged] in your portfolio, after the start of our advising the portfolio
4. A post-dated cheque equivalent of the relevant fixed fee of INR twenty to fifty thousand (INR20,000-50,000/-); dated one month ahead, will be collected at the start of work
5. The cheque will be put for clearing only when a profit of INR20,000/- to 50,000/- (equal to the amount of the cheque) or more is accrued and you'll be notified at least three days prior to putting the cheque for clearing

N.B. Minimum Acceptable Investment is INR5.0 Lacs

Any trouble in understanding the figures or any other query, pls WA or call at +91-8394955932

**** 10% benchmark is the return of average mutual fund in last 10 years**

Thanks,

Dr. Sandeep Gupta

MBBS, MBA, CAIA

For DVSCC

WA: +91-83949 55932

Info@dvsc.in

www.dvsc.in

We endeavour to deliver at least ~30% p.a. ex-fee, (i.e. net return after paying of our fees) or more to our investors, provided market conditions are stable and we experience no shake-down as we had in March 2020.

This is an expectation and **not a guarantee or promise of such returns