

Invest in high potential stocks **Enjoy healthy returns**



TMB in association with Tulsian PMS offers you a truly attractive investment option through our Portfolio Management Services.

If past performance is any indicator, the scheme returned 24% (FY 24 till July) and consistently delivered results well above the NIFTY 50 TRI benchmark. (See table overleaf)

What's more,
it's the only Large Cap Scheme
with more than 40% return*
in 1 year and 2 year period.

Take advantage of powerful partnership between



Tamilnad Mercantile Bank

- ✓ 101+ years of trusted banking
- ✓ Total business of Rs.85000 cr and networth of Rs.7190 cr
- ✓ Strong presence in India through 540 branches

Tulsian PMS

- ✓ Fully-Digital and Discretionary PMS
- ✓ Backed by Tulsian Group, with 35+ years of market expertise
- ✓ AUM (as of June 2023): ~Rs. 110 cr
- ✓ In-house developed proprietary software and Algorithm

PMS Features

- ✓ Personalised Portfolios
- ✓ Online portal to review the performance at any time
- ✓ Independent Analysis and Active Management
- ✓ Min Investment: Rs. 50 lakhs
- ✓ Investment Horizon: 5+ years
- ✓ Custodian : Orbis Financial Corporation Limited

Past Performance

Performance Returns	FY 24 (Till July)	FY 23	FY 22	FY 21
Scheme Returns	24.00%	1.30%	46.00%	97.00%
Benchmark (Nifty 50 TRI)	14.00%	0.60%	20.00%	72.00%

* Scheme in current form exists since 1st April 2020.

Investment Approach

- ✓ Investment by STEM (Structural Timing Earnings Management) framework
- ✓ A diversified portfolio of 12-15 stocks
- ✓ Majority investment in Large Cap
- ✓ Stocks identified on the basis of high potential for growth
- ✓ Focus on Consistent performance and growth

Applicable Fee

- ✓ No upfront / Onboarding / Management Fees
- ✓ Performance Fees @ 15% sharing of the gains, based on High Water Mark Principle (annually)
- ✓ Exit load is chargeable, if exited within 3 years
- ✓ Brokerage, Custodian charges, Fund Accounting charges and any other charges are applicable

Disclaimer: The information contained herein should not be construed as forecast or promise.
Past performance of the Portfolio Manager may not be indicative of the performance in the future.

For further details, contact Treasury Department treasury@tmbank.in **Mobile : 75300 27774 / 91500 39613**

#ForwardTogether

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We are committed to treat our customers in a fair, transparent and non-discriminatory manner.