VALUE STOCKS
Growth lena hai, Sasta lena hai

BLUECHIP HIGH GROWTH LOW VALUATION STRATEGY

This is a Multi cap strategy which has quality Large, Mid & Small Cap Stocks from Nifty Total Market 750 index with high Sales & Profit growth and low valuation.

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PMS MANAGER	TYPE OF REGISTRATION	SEBI REG NO.	INCEPTION DATE
Dynamic Equities Pvt Ltd.	**Non-Individual**	**INP000003468**	**19 March, 2024**

OBJECTIVE: To create long term wealth by investing in portfolio of quality stocks with good valuation and generate alpha both in rising and falling markets.

METHODOLOGY

Multi-factor investing is an investment strategy where you build and manage a portfolio based on multiple factors. Instead of relying on just one style—like “value investing” or “growth investing”—you blend several factors to improve diversification and potentially enhance risk-adjusted returns.

Key Factors Commonly Used

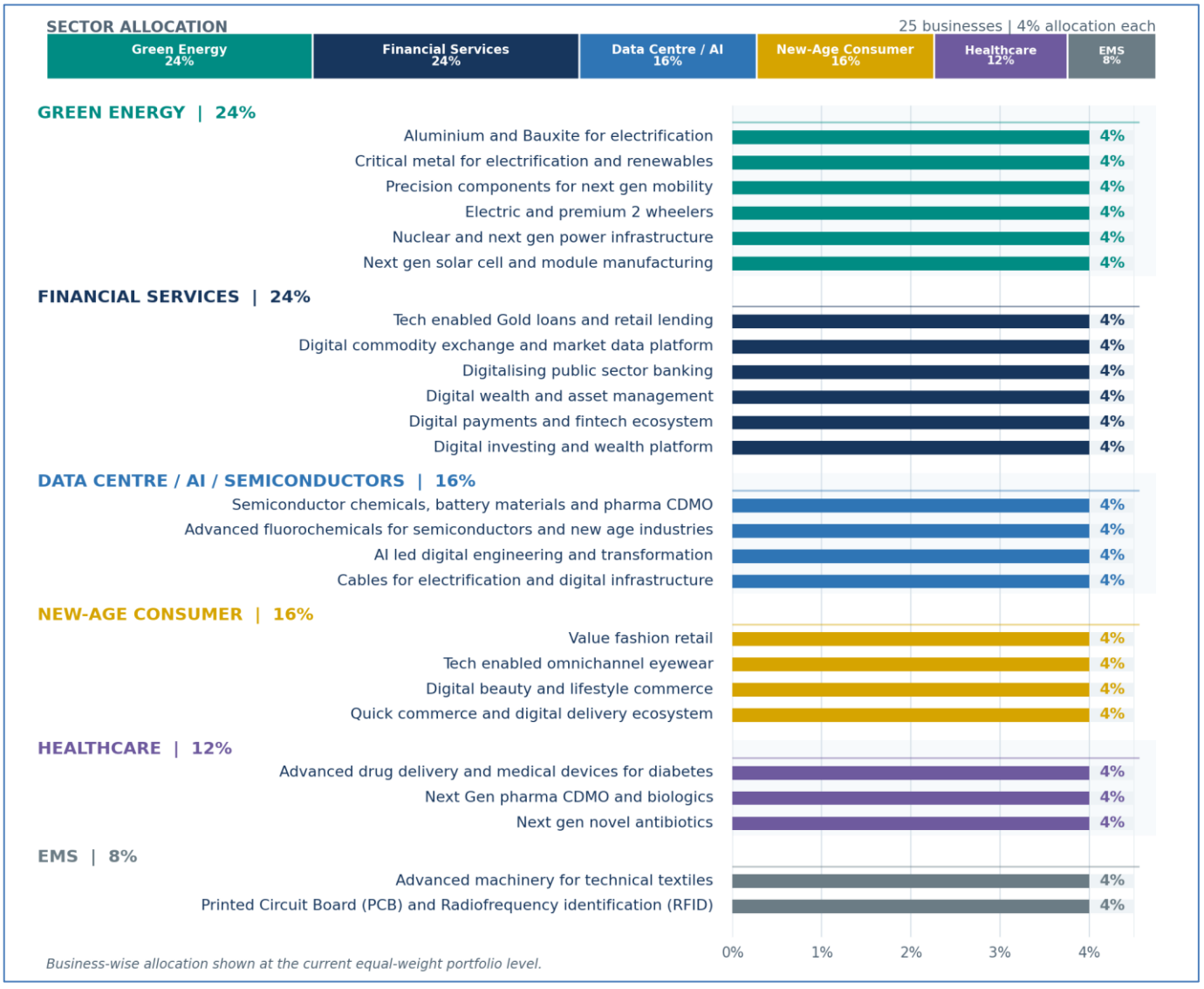
I. Stock Universe: Nifty Total Market (750 Stocks)
II. High Sales Growth (20% minimum) and High Profit Growth (40%)
III. Valuation – Portfolio PEG always maintain less than 1
IV. Risk Mitigation – Low SD and Low Beta stocks
V. Future outlook sectors which are growing

How It Works:

Portfolio Construction: Stocks are screened and ranked according to those factor scores and weighted equally

Diversification: By blending multiple factors, the strategy reduces the risk that any single factor underperforms for too long.

Market Cap Category - **Nifty Total Market 750**	Average Sales Growth TTM – **41.35**
No. of Sectors & Subgroups – **8 & 20**	Average Profit Growth TTM – **81.62**
Total No. of Shares - **25**	Review Frequency – **Quarterly**
Average Market Cap – **87,740 Cr (25 Shares)**	Last Reviewed – **25th Aug, 2026**
Average Price to Earning – **48.01**	Next Review on – **25th Nov, 2026**
Average Daily Volume – **236 Cr.**	Portfolio PEG – **0.59**
VOLATILITY MEASURES	
Standard Deviation– 19.70%	Beta– 1.04
Treynor Ratio– 1.75	Sharpe Ratio– 0.90



RETURNS OVER VARIOUS PERIODS (As on 31st October, 2026)

	Returns since Inception (19 Mar 2024)	2Yr	1 Yr.	6 M	3 M	1 M
Bluechip High Growth Strategy	18.07	9.51	13.59	7.97	3.18	-3.02
Nifty 50 TRI	3.38	-1.30	-9.45	-3.13	-5.29	1.95

Note :

Data as on 31st Aug, 2026 All returns are net of fees and expenses (TWRR). Returns of 1 Year and below 1 Year are absolute and all other returns are annualized. All data points shared are since inception or otherwise mentioned.

FUND MANAGER & PRINCIPAL OFFICER

Mr. Shailesh Saraf

Managing Director - Dynamic Equities Pvt Limited, Certification on Value Investing from Columbia University More than 25 Years' Experience.

Mr. Shailesh Saraf focuses on generating high alpha at substantially lower risk through his excellently devised strategies and stocks. His emphasis on long term quality and growth as foundational principles for equity investing has greatly benefited the investor community.

REGISTERED ADDRESS

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- Prospective Clients are expected to take into consideration all the risk factors including financial conditions, Risk-Return profile, tax consequences, etc.

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- Prospective Clients further understand that all such products are subject to various Market Risks, Settlement Risks, Economical Risks, Political Risks, Business Risks, and Financial Risks etc.

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- Data shown in past performance is as uploaded on SEBI website. Individual performance would differ as or per joining date.

- This document is neither been approved nor disapproved by SEBI, nor has SEBI certified the accuracy adequacy of the contents of the Document.

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- For more risks and Disclosure Document, please click Disclosure Document. Securities investments are subject to market risks, please read the Disclosure Document carefully before investing, please click Disclosure Document.
- Please note that performance of your portfolio may vary from that of other investors and that generated the Investment Approach across all investors because of 1) the timing of inflows and outflows of funds; and2) differences in the portfolio composition because of restrictions and other constraints.
- For performance relative of other Portfolio Managers within the selected Strategy, please refer this link : APMI