



**Solid Research
Solid Relationships**

PMS Navigator

April 2025 | Issue 94



Offering Categories

Name	Type
MOAMC Founders	Multi Cap
MOAMC Value Migration	Multi Cap
MOAMC Mid to Mega	Mid & Small Cap
SBI AEON	Multi Cap
Abakkus AACA	Large & Mid Cap
Abakkus AEOA	Mid & Small
Renaissance India Next PMS	Flexi Cap
Renaissance Opportunity Portfolio	Large Cap
ICICI Pipe	Mid & Small Cap
ICICI Contra	Multi Cap
Marathon Trend Following	Multi Cap
Buoyant Opp Portfolio	Multi Cap
Alchemy Smart Alpha 250	Multi Cap
UNIFI Blended Rangoli	Multi Cap

Our bouquet of PMS offerings

Schemes	Fund Manager	Launch Date	Category	AUM (Rs cr)	Performance (%)					Factsheet	PPT
					1 Year	3 Years	5 Years	7 Years	Since Inception		
MOAMC Founders	Vaibhav Agrawal	16-Mar-23	Multi Cap	2,410	12.9	-	-	-	34.5	Link	Link
MOAMC Value Migration	Vaibhav Agrawal	18-Feb-03	Multi Cap	3,232	10.2	19.7	25.0	14.3	19.5	Link	Link
MOAMC Mid to Mega	Rakesh Tarway	24-Dec-19	Mid & Small Cap	1,625	12.6	15.8	31.9	-	24.4	Link	Link
SBI AEON	Gaurav Mehta	21-Jan-21	Multi Cap	647*	7.0	15.9	-	-	13.5	Link	Link
Abakkus AACA	Aman Chowhan	29-Oct-20	Large & Mid Cap	6,756	1.8	13.6	-	-	25.2	Link	Link*
Abakkus AEOA	Aman Chowhan	26-Aug-20	Mid & Small	4,859	17.9	20.2	-	-	31.9	Link	Link*
Renaissance India Next PMS	Pankaj Murarka	19-Apr-18	Flexi Cap	546	13.0	21.5	39.3		16.1	Link	Link
Renaissance Opportunity Portfolio	Pankaj Murarka	01-Jan-18	Large Cap	514	9.9	16.4	30.4	15.1	13.4	Link	Link
ICICI Pipe	Anand Shah	05-Sep-19	Mid & Small Cap	5,989	9.4	23.7	39.7	-	27.0	Link	Link*
ICICI Contra	Anand Shah	14-Sep-18	Multi Cap	10,297	7.0	20.5	33.3	-	19.7	Link	Link*
Marathon Trend Following	Atul Suri	01-Apr-23	Multi Cap	452	-2.7	-	-	-	24.8	Link*	Link
Buoyant Opp Portfolio	Sachin Khivasara	01-Jun-16	Multi Cap	4,383	15.6	21.2	40.2	17.6	21.7	Link	Link
Alchemy Smart Alpha 250	Alok Agarwal	10-Aug-24	Multi Cap	528	3.3	-	-	-	19.0	Link	Link
UNIFI Blended Rangoli	Prithvi Raj	01-Jun-17	Multi Cap	14,877*	-7.3	10.3	23.9	-	18.6	NP	Link*

Data as on 31st Mar 2025 | *Latest PPTs / Factsheets / Data will be updated as & when we receive it from the AMCs

Overlap of Stocks within offerings

Stock Universe	# of Stocks
Universe of Stocks	209
# of Stocks common (Count)	82

Strategies (Total No. of stocks)	Abakus AACA (28)	Abakus AEOA (30)	Buoyant Opportunities (36)	ICICI Contra (30)	ICICI Pipe (37)	Marathon Trends (19)	MOAMC Founders (24)	MOAMC Mid to Mega (26)	MOAMC Value PMS (25)	Renaissance India Next Portfolio (27)	Renaissance Opportunity (23)
Abakus AACA (28)	-	-	-	-	-	-	-	-	-	-	-
Abakus AEOA (30)	8(21%)	-	-	-	-	-	-	-	-	-	-
Buoyant Opportunities (36)	6(19%)	2(7%)	-	-	-	-	-	-	-	-	-
ICICI Contra (30)	7(31%)	3(7%)	5(27%)	-	-	-	-	-	-	-	-
ICICI Pipe (37)	2(6%)	2(12%)	1(2%)	10(39%)	-	-	-	-	-	-	-
Marathon Trends (19)	0(0%)	2(9%)	2(11%)	1(6%)	0(0%)	-	-	-	-	-	-
MOAMC Founders (24)	0(0%)	1(4%)	0(0%)	1(3%)	0(0%)	2(8%)	-	-	-	-	-
MOAMC Mid to Mega (26)	4(11%)	1(2%)	0(0%)	2(9%)	0(0%)	4(16%)	9(34%)	-	-	-	-
MOAMC Value PMS (25)	0(0%)	0(0%)	1(4%)	0(0%)	0(0%)	3(12%)	18(72%)	8(33%)	-	-	-
Renaissance India Next Portfolio (27)	3(17%)	1(4%)	2(12%)	5(25%)	1(3%)	0(0%)	1(2%)	0(0%)	1(2%)	-	-
Renaissance Opportunities (23)	4(23%)	1(3%)	3(18%)	7(35%)	0(0%)	3(11%)	0(0%)	0(0%)	0(0%)	15(73%)	-
SBI AEON (21)	1(6%)	0(0%)	4(24%)	2(13%)	0(0%)	1(6%)	0(0%)	0(0%)	0(0%)	2(9%)	4(21%)

Note: Unique Stocks along with Allocation are Highlighted in Black Colour Cell

Source: Respective AMCs | Data as on 28th Feb, 2025