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How to get higher Returns from Your Investment Holdings?

FINMO INVESTMENT
ADVISORS PVT LTD

Who Can Get this?

ONE WHO HAS FD OF MORE THAN 1.25CR IN BANKS

Your Bank FDs offers 5.5-6%, you can augment returns safely to 10% or more, without risking the volatility of Equity Markets

THOSE WHO HAVE CURRENT STOCKS & MUTUAL FUNDS PORTFOLIO OF MORE THAN 1.25CR

If you normally hold on to these portfolio for long term, you can gain additional returns without disturbing your current portfolio

THOSE WHO HAVE ESOP SHARES OF LISTED INDIAN COMPANIES

As such the shares of companies you work, you don't sell. Get additional returns using these ESOPs without selling them

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FINMO INVESTMENT ADVISORS PVT LTD

TWO Returns from ONE Investment



One Investment: 1.25Cr

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BASE PORTFOLIO: 1CR

This could be safe Debt Mutual Funds or Stocks that you have already invested, ESOPS that you are holding from many years, which is worth Rs.1Cr

Or

A new set of portfolio for 1Cr, based on our advice suitable to your risk profile

ENHANCED PORTFOLIO:1CR

"Interest Free" 75 Lakhs worth Collateral by pledging the Base Portfolio with NSE. The 75L collateral + Balance 25L cash =1Cr Capital, is invested in low risk, hedged trading strategy in Index Derivatives

The benefit of Leverage makes your total Capital 2Cr, while you have invested only 1.25Cr

Two Returns for 1.25Cr

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EXP. BASE RETURN: 15%

This is the returns what you get from growth of your stocks or ESOPS or Debt Mutual Funds

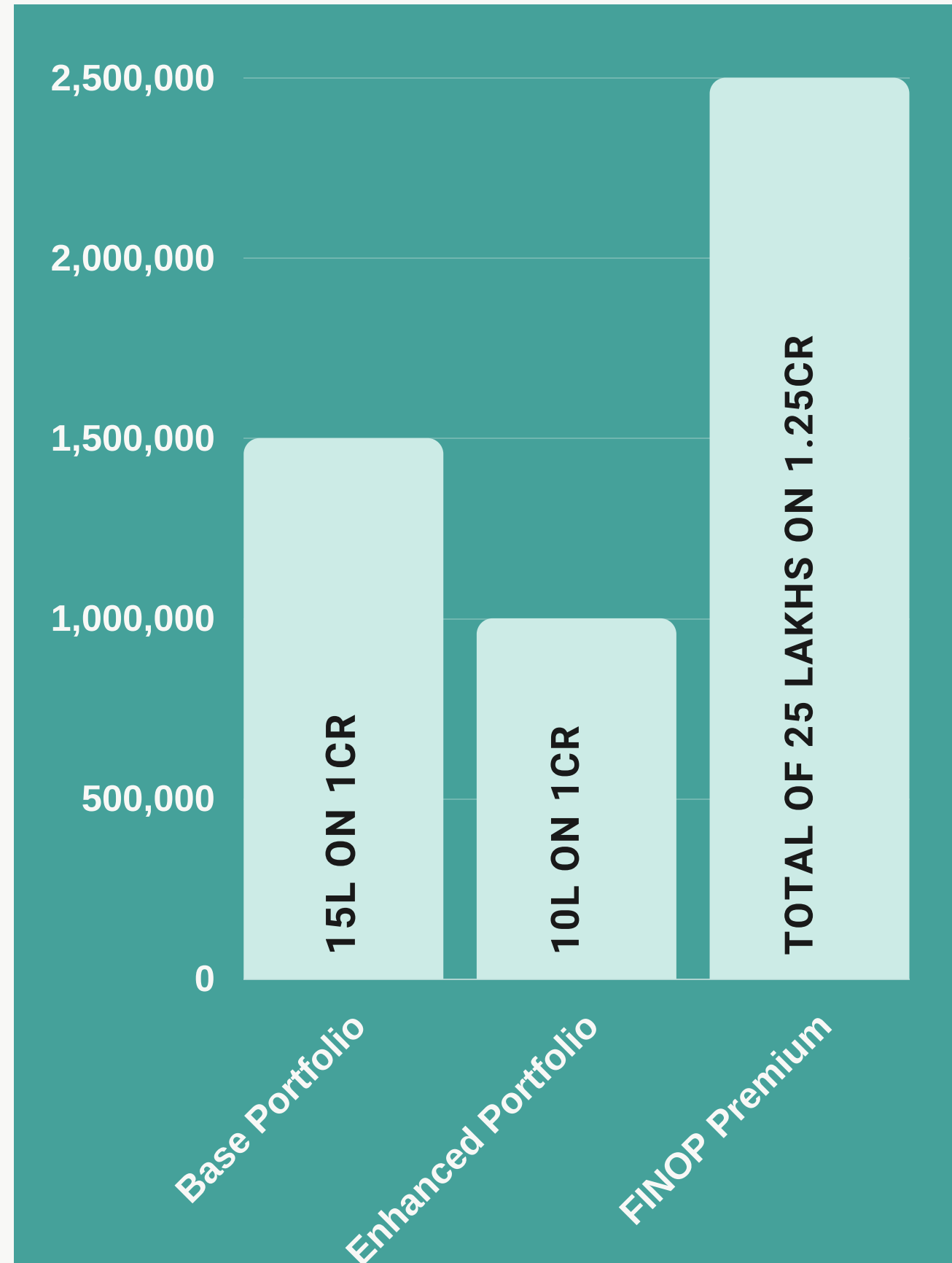
Or

If you are risk averse, you can invest only in Low Duration Debt Mutual Funds for a return like FD, 5.5% to 6%

ENHANCED RETURNS: 9-10%

This is the returns generated from Short Term Index Derivatives trades on a daily basis but accumulated to approximately 9-10% net of all fees & charges

This is done by using high-tech algorithmic execution in your own account, with our affiliated brokers.



Expected returns of 25L/yr on 1.25Cr

If you have Stocks and ESOPS and Equity component in the Base Portfolio of 1Cr, you can expect 15L and additional 10L from Enhanced Portfolio of 1Cr. This means you can expect to get a total of 25L on 1.25Cr per year.

YOU ARE FREE TO KEEP ANY STOCKS OR MUTUAL FUNDS in the Base Portfolio or You can seek our advice on this BASE portfolio for a separate fee



Expected Returns of 15L/y on 1.25Cr

If you are not willing to take Equity Risks and are looking for safety & short term fixed returns, your base portfolio can be just put in FD like Debt mutual Funds.

This gives roughly about 6L/yr on 1Cr Base Portfolio

In the Enhanced Portfolio you can still expect around 9-10%, on the lower side you can get about 9L & overall, you can get about 15L Vis-a-vis the bank FDs, this could be the better option

Enhanced Portfolio: Tracker

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FY 2021	Gross Return	
	Month	Cumm
Apr-20	0.4%	0.4%
May-20	0.4%	0.8%
Jun-20	0.5%	1.3%
Jul-20	1.3%	2.6%
Aug-20	0.9%	3.5%
Sep-20	1.2%	4.7%
Oct-20	1.3%	6.0%
Nov-20	1.0%	6.9%
Dec-20	1.7%	8.6%
Jan-21	1.2%	9.9%
Feb-21	1.4%	11.2%
Mar-21	1.2%	12.4%
Total	12.4%	

FY 2022	Gross Return	
	Month	Cumm
Apr-21	1.0%	0.4%
May-21	1.1%	1.5%
Jun-21	1.2%	2.7%
Jul-21		2.7%
Aug-21		2.7%
Sep-21		2.7%
Oct-21		2.7%
Nov-21		2.7%
Dec-21		2.7%
Jan-22		2.7%
Feb-22		2.7%
Mar-22		2.7%
Total	3.3%	

AVG RETURNS FOR
LAST 7 YEARS
(FY 2014 to 2021)
=
12.4%

FINOP PREMIUM ADVANTAGE

LEVERAGE

Take advantage of your idle holdings to generate extra returns

USE PROFITS

You can withdraw trading profits monthly or quarterly

ALL IN YOUR A/C

All transactions happen in your own demat account linked to your bank



0.5%
On the Portfolio
payable every six
months . For 1.25 Cr, it
is Rs.62500/-twice a
year for an Expected
Profit of 9-10L

What about the Fee?

You pay an Advisory Fee 0.5% of Invested Amount of 1.25Cr or more on subscription for a period of 6 months. Same is the Fee on Renewal Every Six months

An execution fee of 30% of the profit payable to broking partner is applicable on Enhanced Portfolio Profits, returns net of profit share would be 9-10% for a year

How it Works?

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For example: Mr.Sharma has 1.0 Cr worth of MFs, 50L in FD and 50L in Stocks. His Total Holdings is 2 Cr, which he originally invested is 80L 10 years back. He subscribes to FINOP Premium. Let us see how it works for Mr.Sharma

Mr.Sharma gives approval on collateral of his 1 Cr worth of MFs. The Value of Collateral comes to 75L.

The interest free Tradable margin of 75L on pledged MFs is seen in Sharma's Demat account, with FinMo affiliated broker

FinMo Analyses his portfolio and liquidates the non-performing stocks for a value of 25L

Mr.Sharma transfers this 25L to cash to demat account with FinMo affiliated broker. This cash is required for daily MTM requirements

How it Works..Cashflow

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Mr.Sharma confirms 75L Collateral on 1Cr worth of MF Holding from NSE

Investment= Rs.0/-

Mr.Sharma transfers 25L cash created from closing non-performing stocks

Investment= Rs.25,00,000/-

Suppose the Index Derivatives Strategy generates 13% profits in 1 year on 1Cr Capital

Gross Profits = Rs.13,00,000

- **Execution fee by broking partner 30% of Profit share payable every Quarter**
- **FinMo Strategy Advisory Fee 0.5% every six months, 1% per year**

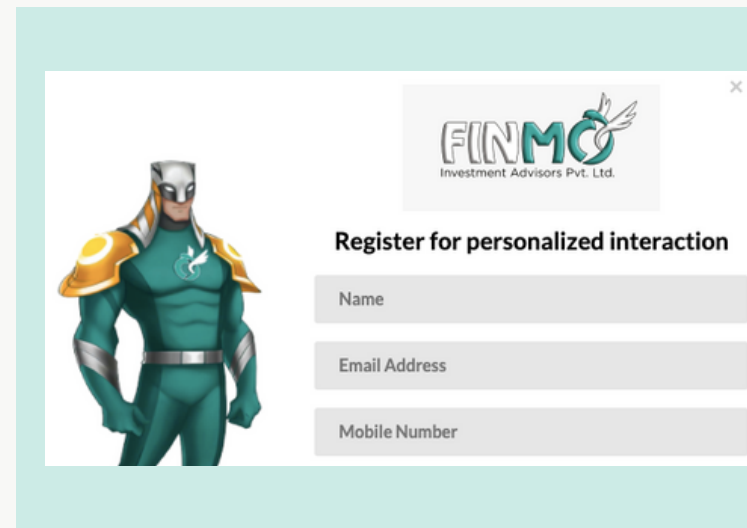
- **Rs.3,90,000**
- **Rs. 1,25,000**

Total Expenses: Rs. 5,15,000

Net Returns = Rs.13L - Rs.5.15L=Rs.7.85 L on 25L investments that is 31.4%

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How to Subscribe?



STEP 1

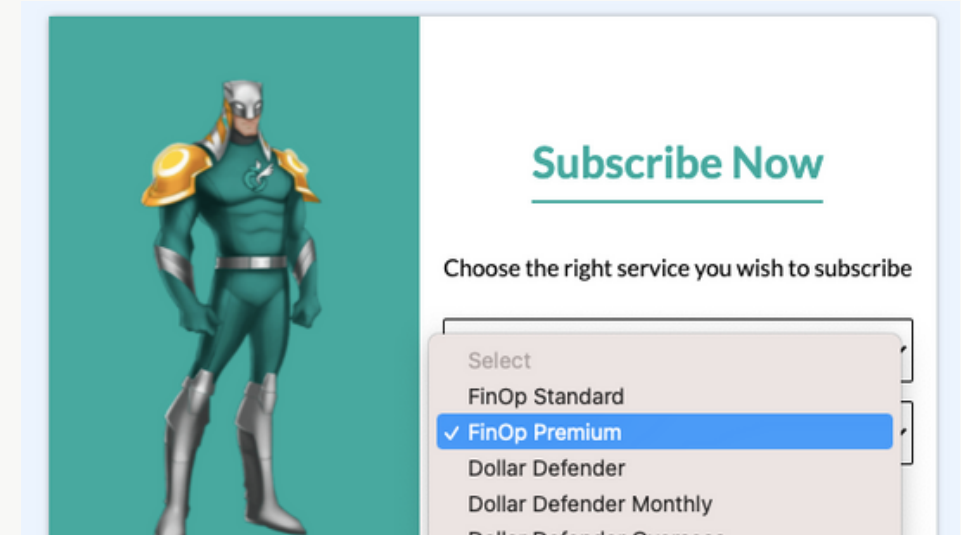
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STEP 2

Discuss your requirements & current holdings with our Experts



STEP 3

Subscribe to FINOP PREMIUM on our portal and get started

Thank you!

**DO LET US KNOW IF YOU HAVE
QUESTIONS OR CLARIFICATIONS.**



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