

DEBT

Thematic

NASDAQ

REIT



Sectoral

beyondmf

AIF

SIF

NIKKEI

Flexicap

PMS

Research-backed.
Solution-focused.
Input-driven.



**The precise statement of
any problem is the most
important step in its
solution.**

~Ed Bliss

Our Philosophy

A close-up of a digital dashboard with various data visualizations. It includes a line chart with a green line, a bar chart with yellow bars, and several numerical metrics. One metric shows 'CTR 14.65%' with a sub-value of '10.6%'. Another shows 'Cost per conversion 673.27' with a sub-value of '10.6%'. A third shows 'Quality Score 9.38' with a sub-value of '-0.1%'.

**Data drives
Decision.**

A person with long, wavy brown hair is sitting at a wooden table. They are holding a coin over a small green and white toy car. The background is a bookshelf filled with books.

**Consistency
over
Intensity.**

A close-up of a wooden chessboard with several chess pieces. The pieces are made of light-colored wood, except for one dark-colored king piece in the foreground. The board is set up for a game.

**Productivity
trumps
Activity.**

Our Approach



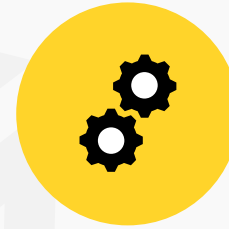
Comprehend

Understand
requirements



Discover

Solution discovery
based on
requirements



Implement

Execution of
solutions



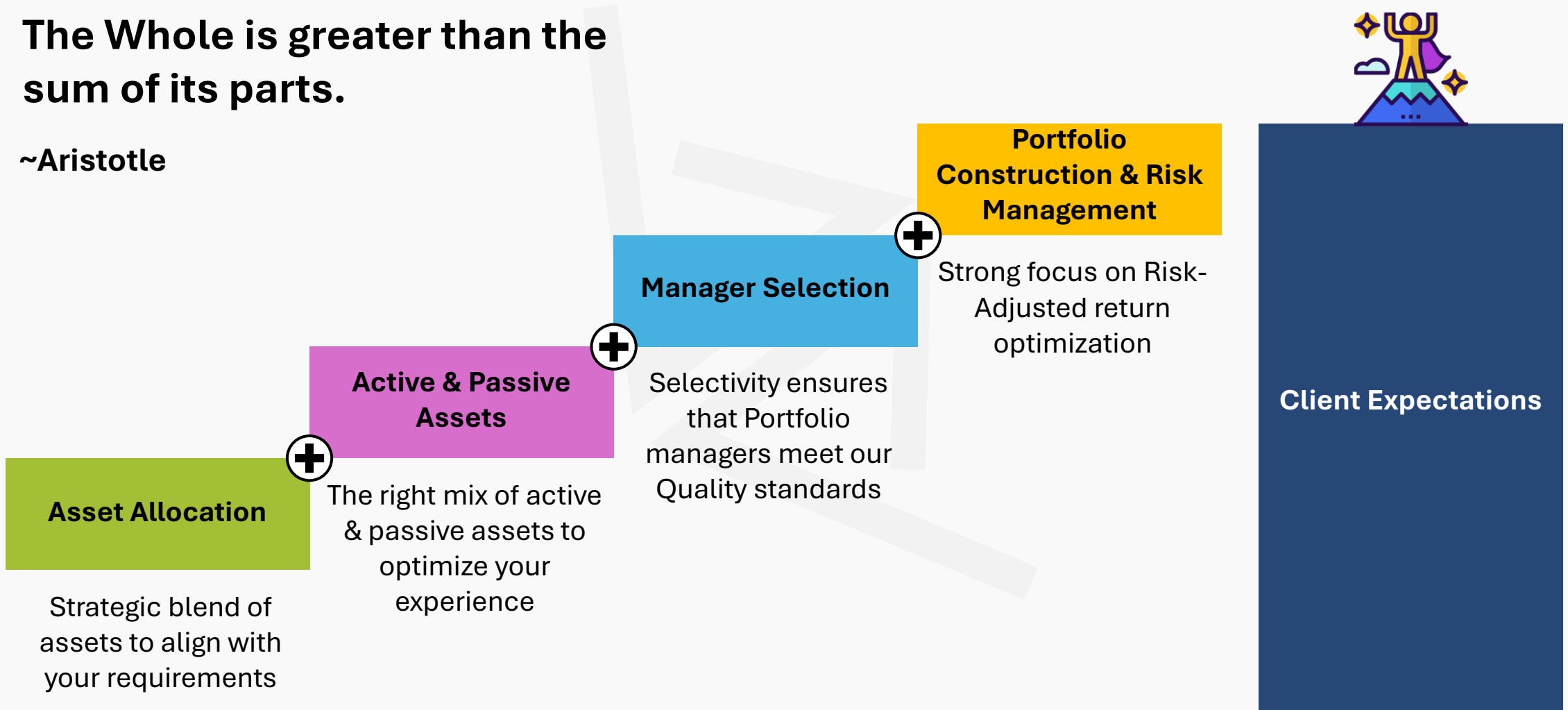
Review

Monitor and track
progress

Our Value Addition

The Whole is greater than the sum of its parts.

~Aristotle



Our Focus

When you focus on the **Output**, Input gets **ignored**.

When you focus on the **Input**, **Output gets taken care of**.

**Our Promise is to
Focus on the **Inputs****



Objectivity.

Evaluation.

Perpetuity.



Investors are spoilt for choice.

1,600+
MF Schemes

990+
PMS Strategies

1,400+
AIFs

..and so on

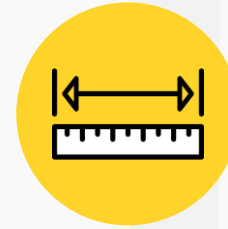
Which one to go for?

Source: Data taken from APMI and SEBI website – As on 30 November 2024

At **beyondMF**, our promise is to..



Analyse



Measure

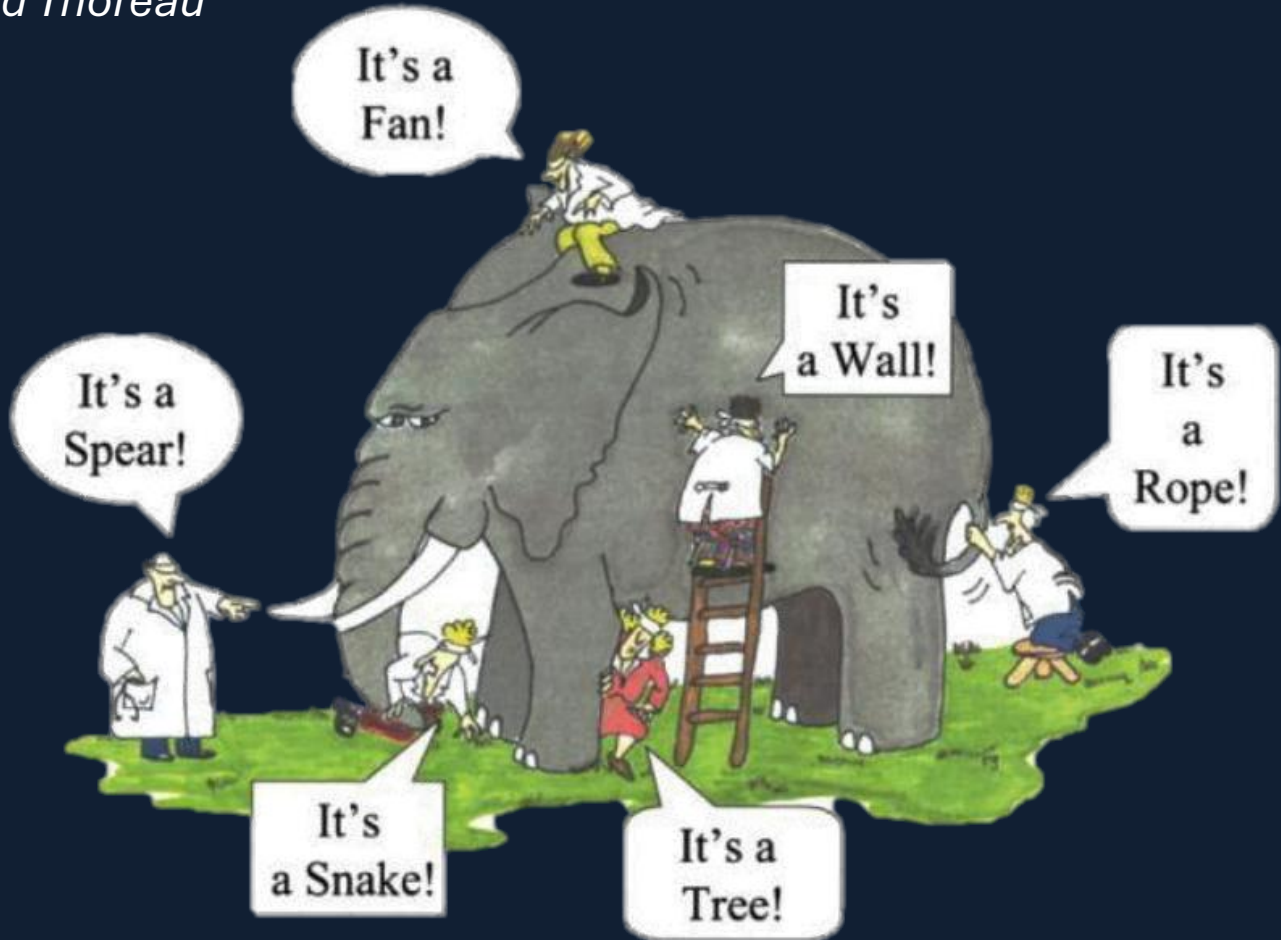


Evaluate

..financial products with the highest level
of **Objectivity**.

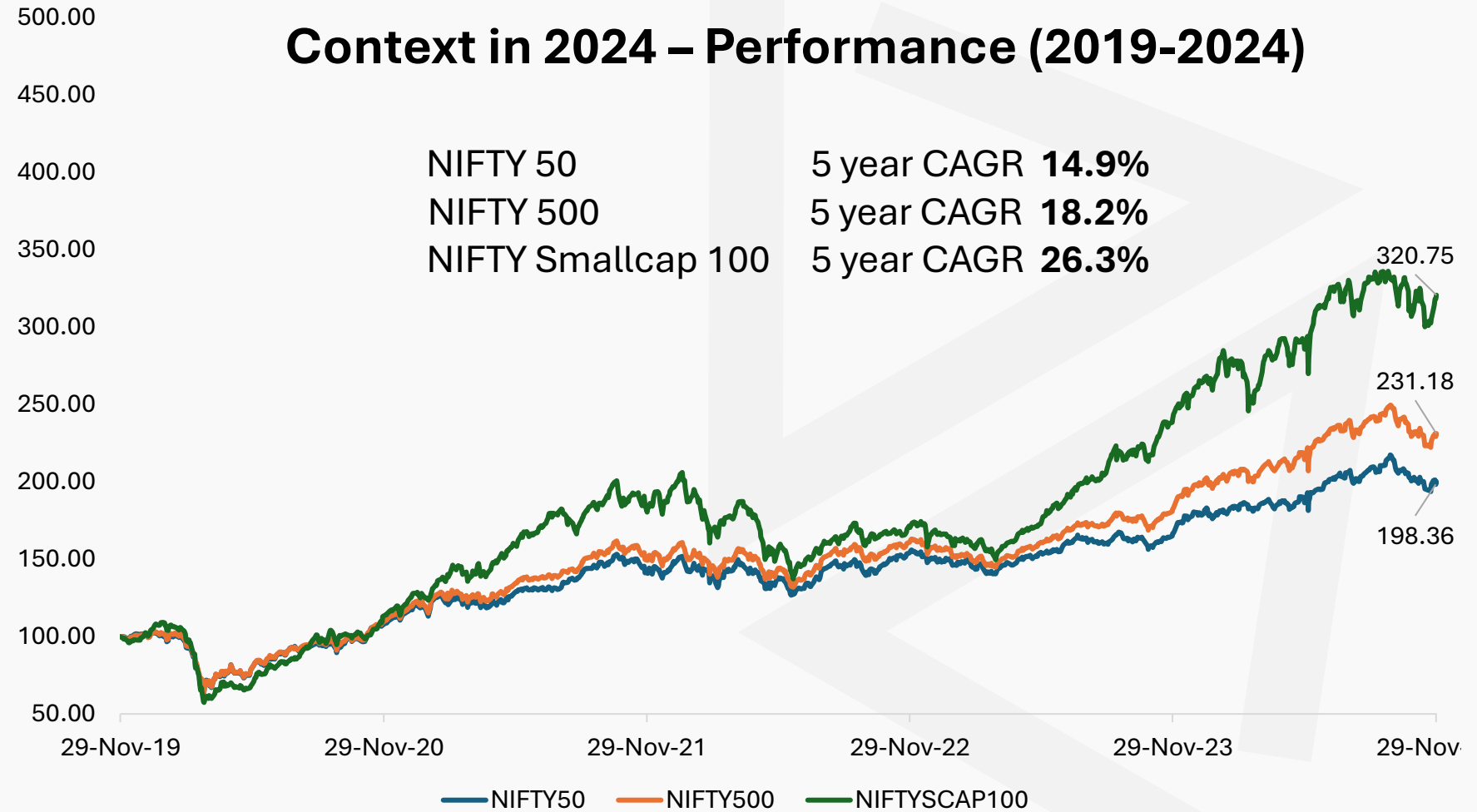
Context matters.

“It’s not what you look at that matters, it’s what you see.”
– Henry David Thoreau



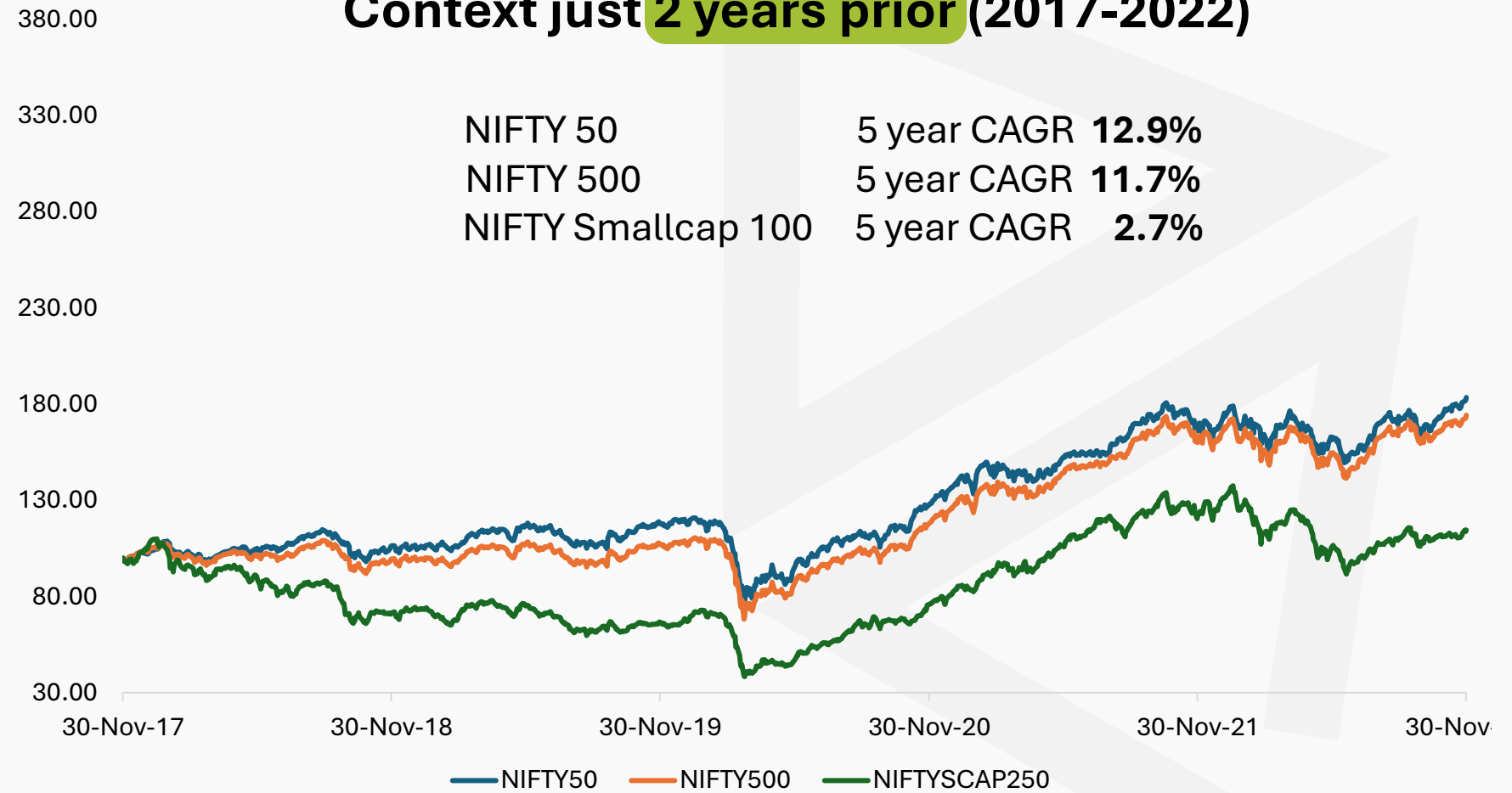
Source: Medium.com

Context in 2024 – Performance (2019-2024)



Source: Data taken as on 30 November 2024 | Data taken from investing.com | Prices rebased to 100

Context just 2 years prior (2017-2022)



Source: Data taken as on 30 November 2022 | Data taken from investing.com | Prices rebased to 100

Let's consider Equity schemes with

Track record of more than 5 years ✓

Asset AUM of more than ₹ 500 Crores ✓

300+

Equity MF Schemes

~ 50% of the above schemes have **outperformed** the respective benchmarks (**Last 5 Year CAGR**)

90+

Equity PMS Strategies

~ 85% of the above strategies have delivered returns of **more than 15%** (**Last 5 Year CAGR**)

Source: Data taken from APMI and ACE MF – As on 30 November 2024 | Data not available for AIF | 5 year CAGR

In Conclusion,

~ 3/4th of the entire market, including the **broader indices** have delivered favourable returns in the **last 5 years.**

Now could be the time for **Revisiting Context.**
Quality evaluation becomes necessary.

Source: Data taken from APMI and ACE MF – As on 30 November 2024 | Data not available for AIF | 5 year CAGR

At **beyondMF**, our promise is to follow a
TWO-WAY EVALUATION MODEL.



FUND CENTRIC

(5-Point Attribute Checklist)

- Fund Manager **track record**
- **Consistency** in Investment Philosophy & Strategy
- **Stability** of the Investment team
- **Risk Management**
- **Fee** structure & charges, lock-in, etc.



CLIENT CENTRIC

(5-Point Assessment Checklist)

- Portfolio **review**
- **Risk** Assessment
- Long-term **Goal** mapping
- Asset **Allocation**
- **Periodic Review**

The Journey from Start to Finish..
..can be Quite **Challenging!**

INPUT 3

PERPETUITY



It is important to have a partner that remains with you for
PERPETUITY.

Once established, **beyondMF's** relationship with you
would be **forever.**

We win,
when YOU win.

Our Offerings

PMS/AIF

Mutual Funds

REITs & more

SCOPE OF ANALYSIS



- Fund Manager Track record
- Deployment Strategy
- Portfolio Efficiency
- Investment Team Stability
- Corporate Governance

KEY DELIVERABLES



Five-Point Output Reporting Kit

- Monthly 'Know Your Market (KYM)' Report
- Quarterly **Quality Assurance Report**
- Portfolio **Deviation Report** (if any)
- Quarterly **Portfolio Key Changes Report**
- **Peer Performance** reporting

PMS/AIF

PMS/AIF	PMS Aggregators	beyondMF	What we offer
Aggregated Index of all PMS/AIFs in the country	✓	X	Limited number of carefully curated high-quality products.
Past-performance driven fund suggestions	✓	X	Potential to deliver sustainable risk-adjusted returns in the future.
Holistic and Client-centric Assessment	X	✓	Investor's overall financial health is taken into account.
Focus on Investor Risk-appetite	X	✓	Product alignment with Risk appetite and Risk capacity of the investor.

Mutual Funds

SCOPE OF ANALYSIS



- Fund Manager Track record
- Portfolio Positioning
- Portfolio Strategy
- Corporate Governance

KEY DELIVERABLES



Five-Point Output Reporting Kit

- Monthly 'Know Your Market (KYM)' Report
- Quarterly **Quality Assurance Report**
- **Periodic Communication** from Fund Managers/Industry experts
- Quarterly **Portfolio Key Changes Report**
- **Peer Performance** reporting

Meet the **Team**





Ganesh A

Founder and Chief Navigator

- Qualified Cost and Management Accountant (CMA) and affiliated to the Association of Chartered Certified Accountants (UK) with a decade of professional experience across Equity Research, Wealth Management and FP&A.
- Experienced at handling diverse core organizational functions concurrently.
- Last role was as part of the Investment Team (Product & Strategy - PMS) of ithought Financial Consulting LLP (a boutique Investment Management firm with a PMS Asset base of over ₹ 2,500 Crores). Joined the organisation in 2021 as a Product Manager when the firm's PMS AUM was less than ₹ 100 Crores.
- Was instrumental in building systems across various functions like Product, Operations, Sales and Compliance. Individually developed and managed an B2C asset base of ₹ 200+ Crores (200+ HNI clients) over a period of 3+ years.
- Developed strong professional relationships with NRIs (> 20% of the asset base) over the last 3 years.



Poonam Thadani

Co-founder and Brand Specialist

- Masters' Degree (Bioinformatics) from Stella Maris
- 6+ years of experience in Communication, Branding, Design & Product Marketing at ithought Financial Consulting LLP (a boutique Investment Management firm).
- Experienced at handling a team of digital media professionals working towards core organisational objectives like Lead generation, Social Media presence and communication
- Hands-on experience with working on other Branding Projects for spaces like AI, FMCG, Architectural etc.



Balaji Parthasarathy

Expert Consultant

- Chartered Accountant with over a decade of experience in the financial services industry.
- Started his career as a rating analyst at Crisil (an S&P company) and evolved to roles of CFO for NBFCs.
- Last role was at Anicut Capital (> 5 years), Private Credit fund leading investments in private credit, managing ~ ₹ 3,000 Crs of Investments across tenor
- Specializes in CFO & Support services, Investment Banking, Fixed Income securities, PE/VC, Equity/Seed/Angel Fund Raise.

Contact Us





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