



BREAKING NEWS

RELATIVE CHANGE IN THE BULL MARKET IN THE
LAST 6 MONTHS HAVE BEEN VERY STRONG



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Anirudh Garg, Fund Manager at INVasset PMS, has an insightful conversation with Sharan Hedge in this edition of the 1% CLUB for a deep dive into India's future as a wealth-building engine. In this video, Anirudh Garg discusses how INVASSET has provided 128% returns while NIFTY returns were at 29%. Discipline and quant being followed are the key factors for the tremendous growth. Anirudh shares raw, actionable insights that every retail investor needs today. He breaks down why capex and stock market infrastructure are future-ready sectors and how SIPs are the most underrated investing superpower. The real power of CAGR is explained and how it is effected in long term rather than short term benefits.



“
Power of CAGR is what matters in long term investment
”

“
Invest when it is right time and not when markets are very high
”



“
Good Scope in Fertilizer and Agrochemicals
”

For the complete interview click on the link : <https://youtu.be/oWbkdFlmzE>

बैंकिंग शेयरों में क्या करें निवेशक?



Nifty Midcap 100 53486.25 1189.55 ▼	BREAKING NEWS मिडकैप इंडेक्स में भारी गिरावट, 2.5% फिसला	Tue 6 May NIFTY 24391
Natural Gas MCX 9.9k 305.80 ▲ 5.80	GAIL ¹⁰ 5.1m 186.15 ▼ 5.04	Turmeric GdCons ¹ 939.

07 GAIL¹⁰ 5.1m 186.15 ▼ 5.04 GdCons¹ 939.

Anirudh Garg, Fund Manager at INVasset PMS, joins CNBC Awaaz to break down market resilience amid geopolitical tensions and sector shifts. He explains why his team is cautious despite market rallies: they completed positions by early March but remain fully prepared to pivot to cash if needed. He shares why disciplined SIPs into quality market leaders are the best path for new investors and highlights why INVasset focuses on sectors with real pricing power and leadership rather than chasing overheated or speculative areas.

For the complete interview click on the link : <https://www.youtube.com/watch?v=IGATVceZOPw>

Anirudh Garg on India's Next Bull Run and Sector Outlook with CNBC Awaaz 29th May, 2025

ITC	3.12%
420.35	13.55
INDUSIND BK	1.80%
805.90	14.80
NESTLE INDIA	1.71%
2418.90	42.00

Anirudh Garg, Fund Manager at INVasset PMS explains the market volatility and change behaviour of FI's. The relative changes in bull market from last 6 months have been very strong. He discusses how private banks, supported by reasonable valuations and strong management, are likely to lead the next bull run. He evaluates the real estate and auto sectors, preferring real estate given current market dynamics. Anirudh also highlights attractive long-term opportunities in market intermediaries and capex sectors such as defense and infrastructure. His disciplined approach stresses capital preservation and selective investing during volatile times.

For the complete interview click on the link : <https://youtu.be/MMwOraoMuzo>

ETMarkets Smart Talk | Dollar strength, geopolitics & yields – the triple threat roiling Indian markets: Anirudh Garg

Amid market volatility fueled by global factors like dollar strength and geopolitical tensions, Anirudh Garg of INVasset PMS offers insights on navigating Dalal Street. He suggests tactical portfolio shifts, highlighting opportunities in sectors like textiles, financials, and defence. Anirudh emphasizes a data-driven approach to managing risk and uncovering long-term value in a dynamic market.

For the complete interview click on the link : <https://economicstimes.indiatimes.com/markets/expert-view/etmarkets-smart-talk-dollar-strength-geopolitics-yields-the-triple-threat-roiling-indian-markets-anirudh-garg/articleshow/121587832.cms?from=mdr>

India still a top FII bet as Dollar cools; RBI may cut rates: Says Anirudh Garg on interaction with Money Control

According to Anirudh Garg of INVasset PMS, India is set to remain a preferred destination for global investors within emerging markets. "The US Dollar Index (DXY) has cooled significantly, which lowers the cost of capital and makes emerging markets more attractive for Foreign Institutional Investors (FIIs)," he said in an interview with Moneycontrol. He anticipates a stronger earnings trajectory in the latter half of FY26, driven by a combination of supportive macro and policy factors. "The structural growth themes such as defence modernisation, financialisation, and infrastructure spending continue to provide tailwinds," the Partner and Fund Manager at INVasset PMS said.

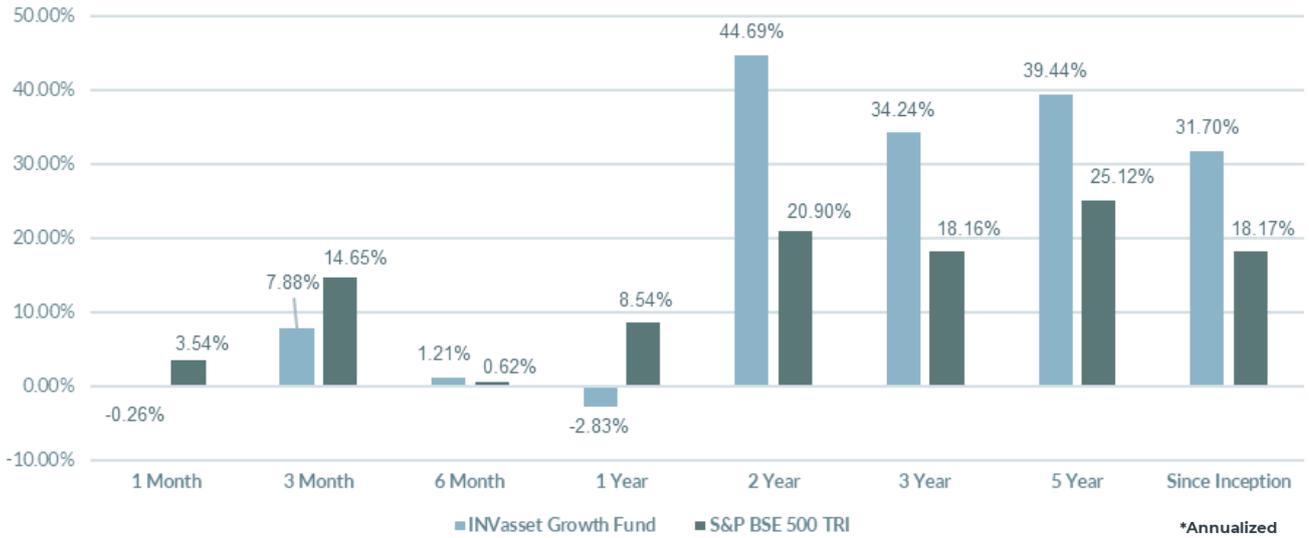
For the complete interview click on the link :

<https://www.moneycontrol.com/news/business/markets/daily-voice-india-still-a-top-fii-bet-as-dollar-cools-rbi-may-cut-rates-says-this-fund-manager-13083353.html/amp>

INVasset PMS | Growth Fund Performance – Absolute Basis

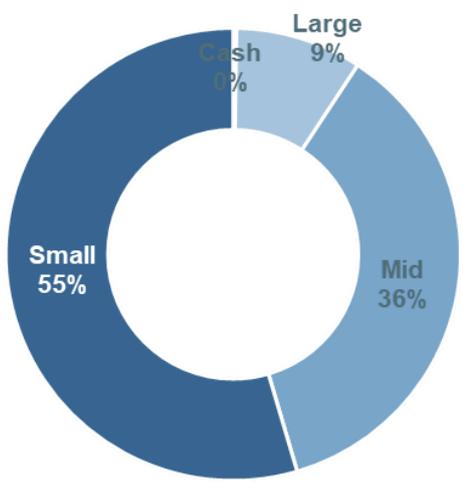


INVasset PMS | Growth Fund Performance – Period Wise



Top 3 Sectors	Assets%
Stock Market & Related	25.18%
Defence	24.43%
Fertilizers	11.24%

Top 3 Stocks	Assets%
BSE Ltd.	5.94%
Mazagon Dock Shipbuilders Ltd.	5.23%
Nuvama Wealth Management Ltd.	4.70%



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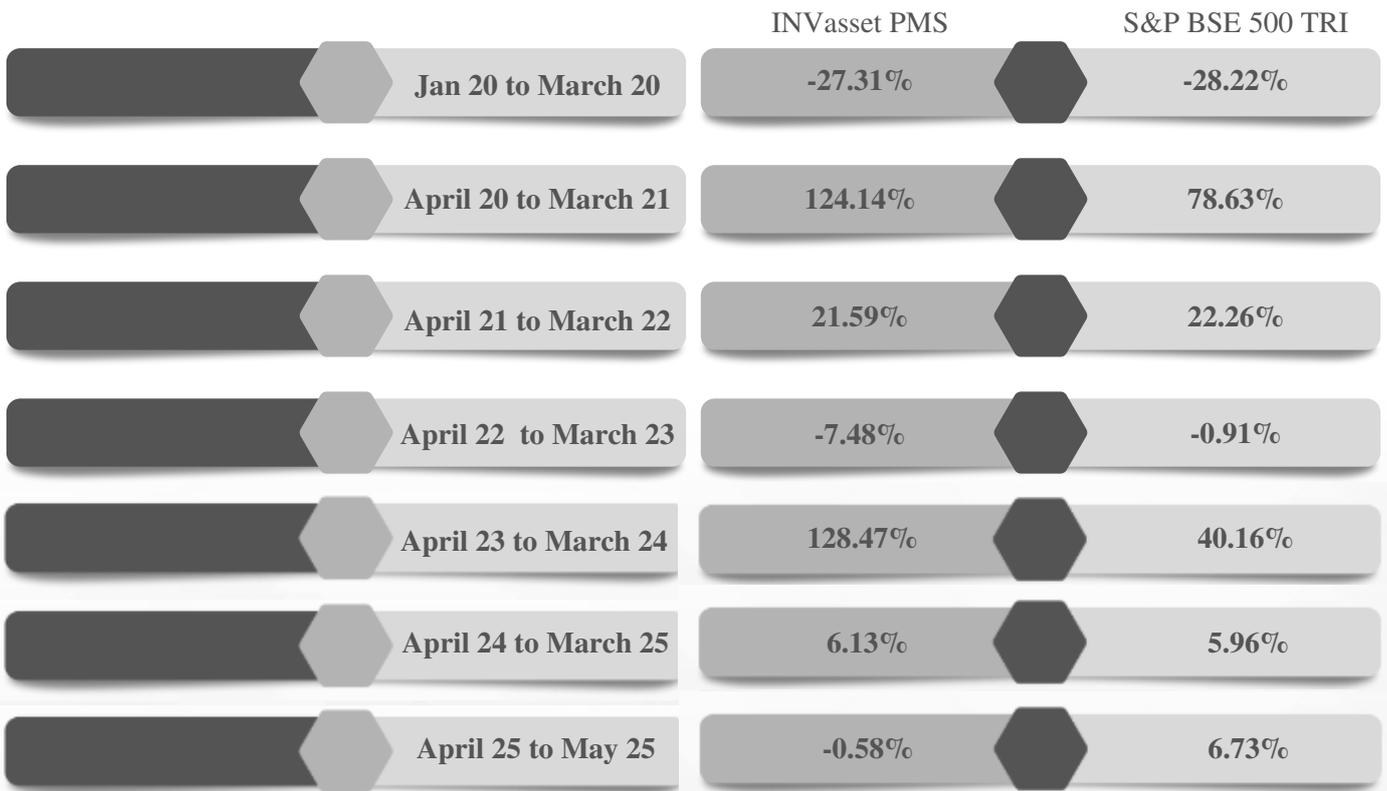
INVasset PMS		S&P BSE 500 TRI		INVasset PMS		S&P BSE 500 TRI	
Month	% Absolute Return	% Absolute Return	Month	% Absolute Return	% Absolute Return	Month	% Absolute Return
January - 20	100	100	August - 22	11.65% 211.01	4.81% 163.11	August - 22	11.65% 211.01
January - 20	2.97% 102.97	0.72% 100.72	September - 22	-2.71% 205.30	-3.22% 157.86	September - 22	-2.71% 205.30
February - 20	-4.63% 98.20	-6.42% 94.26	October - 22	3.20% 198.73	4.09% 164.31	October - 22	3.20% 198.73
March - 20	-25.98% 72.69	-23.85% 71.78	November - 22	3.63% 205.30	3.46% 170.00	November - 22	3.63% 205.30
April - 20	14.42% 83.18	14.63% 82.28	December - 22	-6.47% 192.62	-3.15% 164.64	December - 22	-6.47% 192.62
May - 20	0.79% 83.83	-2.32% 80.17	January - 23	-1.17% 190.36	-3.34% 159.15	January - 23	-1.17% 190.36
June - 20	4.88% 87.92	8.30% 87.04	February - 23	-6.19% 178.58	-2.75% 154.77	February - 23	-6.19% 178.58
July - 20	4.51% 91.89	7.10% 93.22	March - 23	2.64% 183.30	0.36% 155.33	March - 23	2.64% 183.30
August - 20	8.34% 99.56	3.91% 96.87	April - 23	11.82% 204.97	4.59% 162.45	April - 23	11.82% 204.97
September - 20	10.55% 110.06	-0.22% 96.66	May - 23	2.93% 210.97	3.77% 168.58	May - 23	2.93% 210.97
October - 20	2.70% 113.03	2.60% 99.17	June - 23	12.21% 236.72	4.28% 175.80	June - 23	12.21% 236.72
November - 20	15.73% 130.80	11.78% 110.85	July - 23	15.09% 272.44	3.80% 182.48	July - 23	15.09% 272.44
December - 20	3.40% 135.24	7.70% 119.39	August - 23	12.36% 306.12	-0.47% 181.62	August - 23	12.36% 306.12
January - 21	-3.02% 131.16	-1.75% 117.30	September - 23	9.83% 336.22	2.10% 185.44	September - 23	9.83% 336.22
February - 21	15.66% 151.70	7.93% 126.61	October - 23	-5.14% 318.93	-2.86% 180.14	October - 23	-5.14% 318.93
March - 21	7.40% 162.93	1.27% 128.21	November - 23	10.09% 351.10	7.06% 192.85	November - 23	10.09% 351.10
April - 21	13.79% 185.41	0.47% 128.82	December - 23	7.84% 378.64	8.04% 208.35	December - 23	7.84% 378.64
May - 21	9.15% 202.36	7.07% 137.93	January - 24	17.14% 443.53	1.92% 212.34	January - 24	17.14% 443.53
June - 21	-1.06% 200.21	2.12% 140.87	February - 24	-5.40% 419.57	1.66% 215.34	February - 24	-5.40% 419.57
July - 21	0.34% 200.89	1.52% 143.01	March - 24	-0.19% 418.78	0.86% 217.71	March - 24	-0.19% 418.78
August - 21	0.51% 201.91	6.60% 152.45	April - 24	2.73% 430.23	3.44% 225.19	April - 24	2.73% 430.23
September - 21	0.14% 202.20	3.41% 157.64	May - 24	5.70% 454.77	0.83% 227.07	May - 24	5.70% 454.77
October - 21	0.25% 202.71	0.30% 158.12	June - 24	13.11% 514.38	7.05% 243.09	June - 24	13.11% 514.38
November - 21	-2.11% 198.42	-2.90% 153.53	July - 24	7.88% 554.91	4.44% 253.89	July - 24	7.88% 554.91
December - 21	0.30% 199.01	2.36% 157.15	Aug - 24	-10.32% 497.63	0.96% 256.33	Aug - 24	-10.32% 497.63
January - 22	-7.41% 184.27	-0.38% 156.56	Sep - 24	-3.77% 478.87	2.09% 261.68	Sep - 24	-3.77% 478.87
February - 22	0.09% 184.45	-3.94% 150.38	Oct - 24	-7.94% 440.83	-6.45% 244.81	Oct - 24	-7.94% 440.83
March - 22	7.41% 198.11	4.24% 156.75	Nov - 24	-0.96% 436.61	0.06% 244.95	Nov - 24	-0.96% 436.61
April - 22	0.16% 198.42	-0.57% 155.86	Dec - 24	1.00% 440.96	-1.50% 241.28	Dec - 24	1.00% 440.96
May - 22	-7.97% 182.62	-4.16% 149.38	Jan - 25	1.10% 445.80	-3.43% 233.00	Jan - 25	1.10% 445.80
June - 22	-6.89% 170.03	-5.08% 141.80	Feb - 25	-8.12% 409.62	-7.74% 214.97	Feb - 25	-8.12% 409.62
July - 22	0.09% 189.00	9.76% 155.63	March - 25	8.50% 444.46	7.32% 230.69	March - 25	8.50% 444.46
			April - 25	-0.35% 443.06	3.18% 238.02	April - 25	-0.35% 443.06
			May - 25	-0.26% 441.90	3.54% 246.21	May - 25	-0.26% 441.90

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Calendar Year Returns



Financial Year Returns



Ratios & Risk (as on May, 2025)



CAGR (since inception)

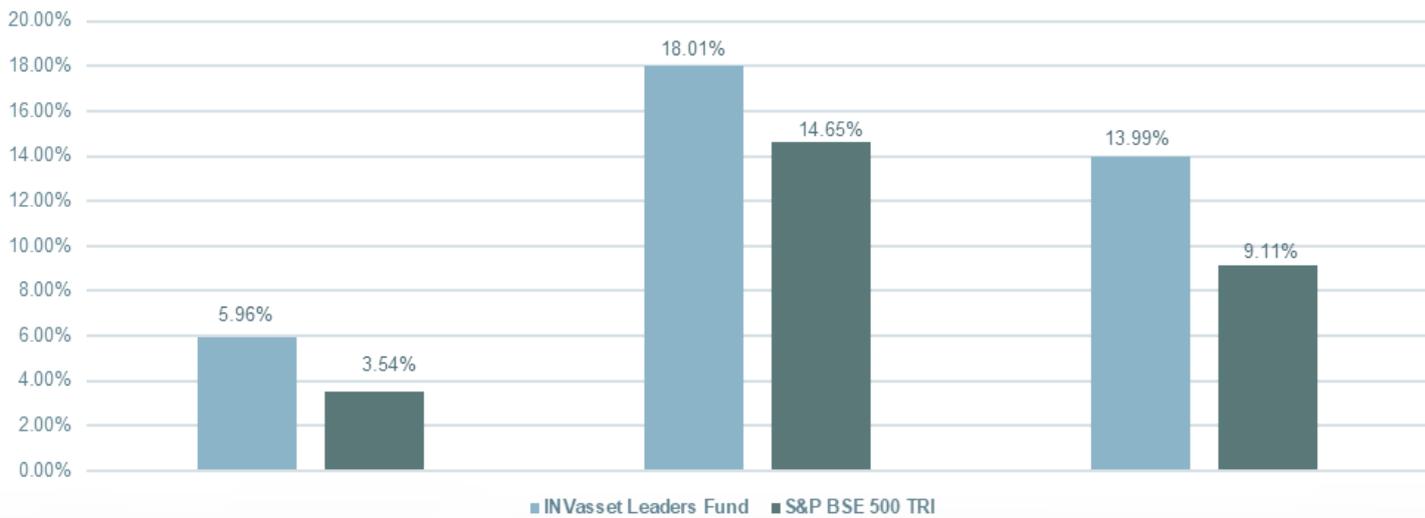


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INVasset PMS | Leaders Fund Performance – Absolute Basis

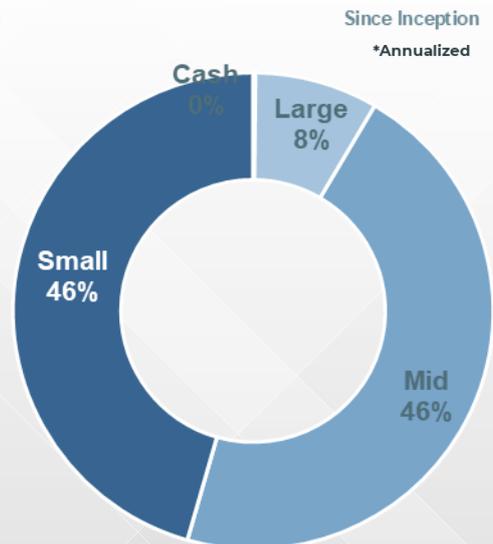


INVasset PMS | Leaders Fund Performance – Period Wise



Top 3 Sectors	Assets%
Defence	21.87%
Stock Market & Related	21.18%
PVT Capex	11.64%

Top 3 Stocks	Assets%
BSE Ltd.	5.68%
Mazagon Dock Shipbuilders Ltd.	4.88%
Bharat Electronics Ltd.	4.78%

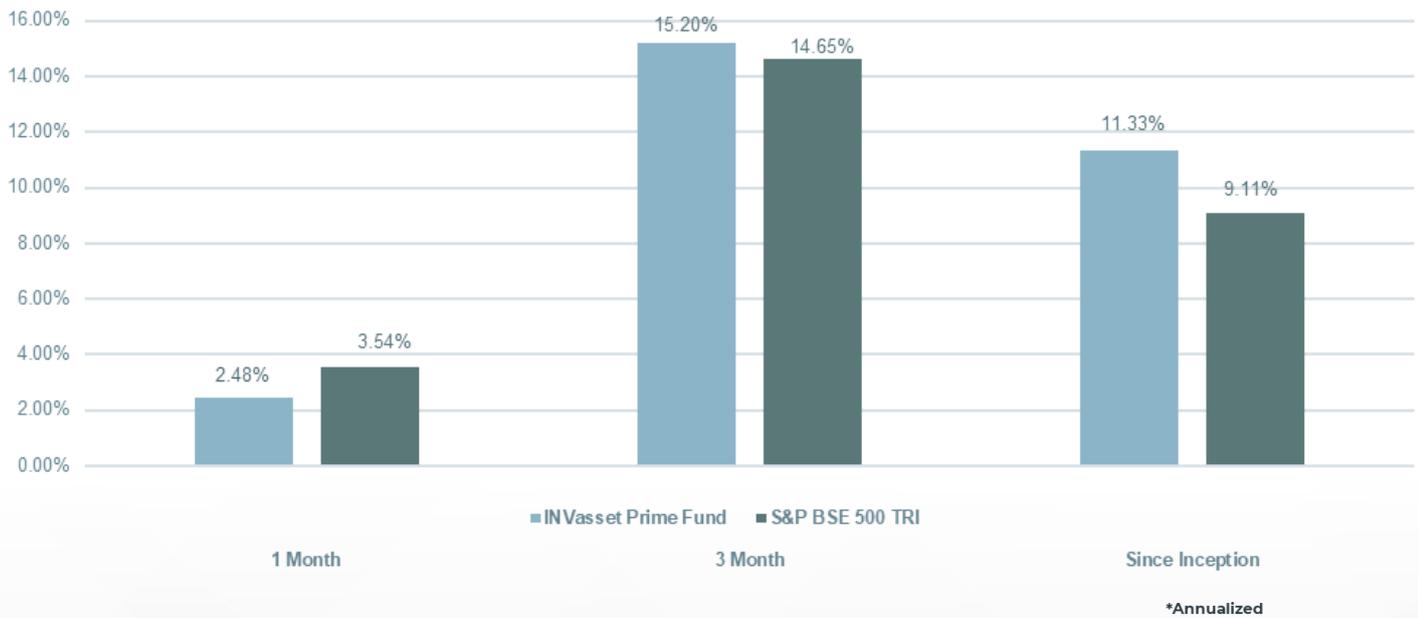


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INVasset PMS | Prime Fund Performance – Absolute Basis

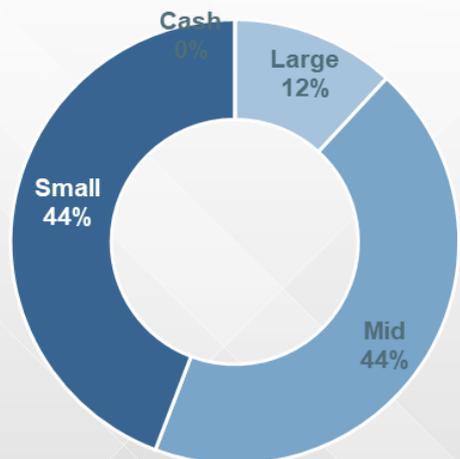


INVasset PMS | Prime Fund Performance – Period Wise



Top 3 Sectors	Assets%
Defence	23.98%
Stock Market & Related	20.41%
PVT Capex	19.89%

Top 3 Stocks	Assets%
BSE Ltd.	4.39%
Deepak Fertilisers And Petrochemicals Corporation Ltd.	4.28%
Suzlon Energy Ltd.	4.23%



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In May 2025, the National Stock Exchange (NSE) of India witnessed a historic surge in trading volumes—an inflection point in the country's capital market evolution. This remarkable upswing, possibly triggered by monsoon-linked commodity speculation and renewed post-budget optimism, provides a rich context for investors to decode underlying trends and realign their strategies.

A key catalyst was the heightened focus on agriculture and energy sectors, both of which become central during the pre-monsoon period. A favorable monsoon forecast can significantly uplift farm output—especially staples like soybean and rice—thereby reducing import dependency and strengthening the rupee through enhanced agri-exports. This seasonal optimism often finds its way into equity markets, as investors anticipate improved earnings for companies linked to rural demand, agri-inputs, and energy supply chains.



Adding to the momentum were policy incentives likely stemming from the Union Budget presented earlier in February. May is typically when several budgetary allocations begin to take operational shape. Tax incentives, rural spending outlays, and infrastructure push—all contribute to sectoral bullishness and higher market participation.

A striking feature of the May 2025 surge was the exceptionally high deliverable quantities reported by the NSE—an indicator that the buying interest was not just speculative but backed by strong conviction. Such patterns often reflect investor confidence in sustained price rallies rather than short-term trades.

Concurrently, structural developments in India's commodity markets played a supporting role. The Multi Commodity Exchange (MCX) was reportedly advancing its electricity derivatives framework around this time, a significant reform later approved in June 2025. Volatility in the power sector—owing to coal shortages and peak summer demand—may have drawn market participants to hedge their exposure using proxies in equity markets, thus indirectly elevating NSE volumes. According to a 2022 International Energy Agency study, well-designed derivatives can reduce price risk by up to 25%, which likely encouraged broader participation.

However, this spike in trading activity is a double-edged sword. While increased volumes improve liquidity and market efficiency, they may also heighten short-term volatility. Retail investors, in particular, need to tread carefully. Past research, including a 2021 SEBI study, has cautioned that a significant portion of retail participants in derivatives tend to incur losses, underlining the need for informed participation and risk containment.

For investors, the takeaway is strategic: leverage liquidity while staying grounded in fundamentals. Diversification, consistent monitoring of sectoral cues, and guidance from credible financial advisors are essential to navigating such high-velocity phases.

Ultimately, the May 2025 surge serves as a reminder that Indian markets remain highly sensitive to macroeconomic cues and seasonal triggers. For those who stay informed and maintain disciplined investing frameworks, such episodes offer more than just excitement—they offer opportunity.

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