

Trade mark

IDEAL | Associates



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Profile



Our Profile

Since Oct 2016, We have been Certified by SEBI as Research Analyst

Successful 100+ clients with 20Cr+ portfolio



Our Business

We are providing Investment Portfolio advisory & Risk management

Analysis individual client portfolio & provide Recommendations

Philosophy



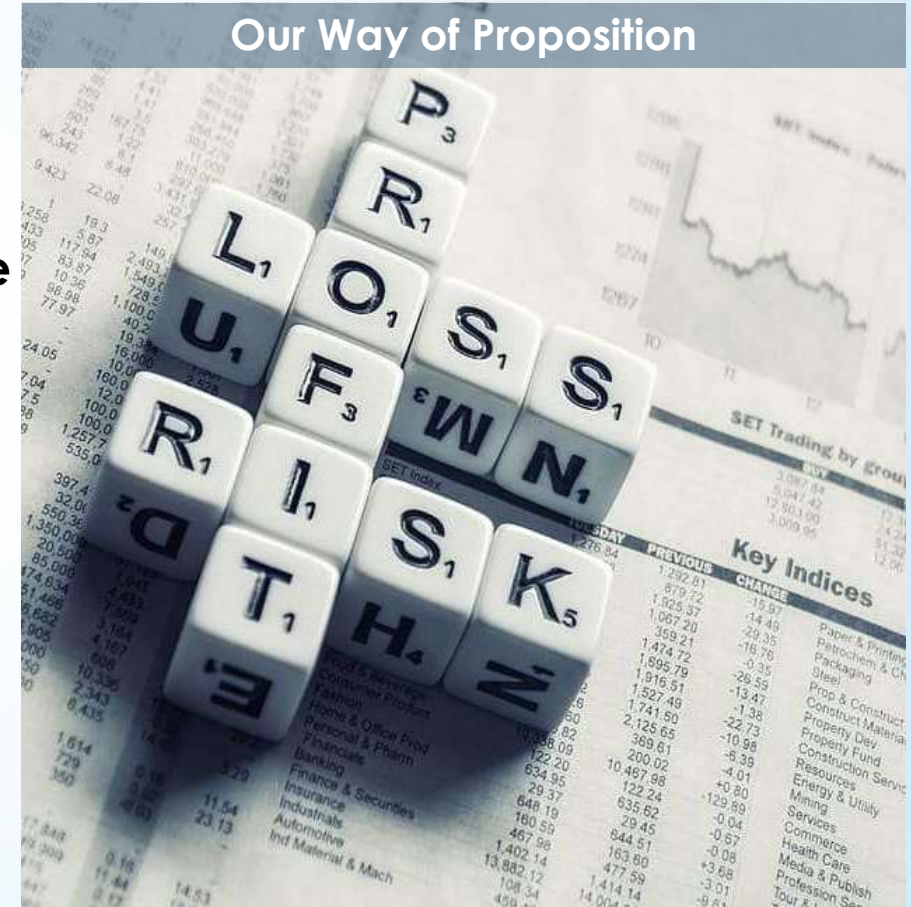
Our Investment Strategy

- ✓ **Long Term Focus**
- ✓ **Yearly Identification of Successful business**
- ✓ **Enhanced Portfolio Structuring**
- ✓ **High Focus Risk Management**
- ✗ **No Margin Trades or Speculation**
- ✗ **No Derivative Trading**

USP of Ideal

- ▶ Customized Portfolio Design
- ▶ Investing in Futuristic Sectors
- ▶ Stock Purchase made at Affordable Price
- ▶ Monitoring Portfolio Risk Regularly
- ▶ Buy & Hold Strategy
- ▶ Low Selling Activity
- ▶ Yearly Portfolio Restructuring
- ▶ Exploring New Opportunities

Our Way of Proposition



Systematic Analysis



Exploring growth Sector



Glimpse into Stock
History & Current
Books



Check Technical
indicators



Our Vision



Restructure as per Macro
Economic Trend



Discover Futuristic
Value



Investing in
Sectorial winners

Capitalization

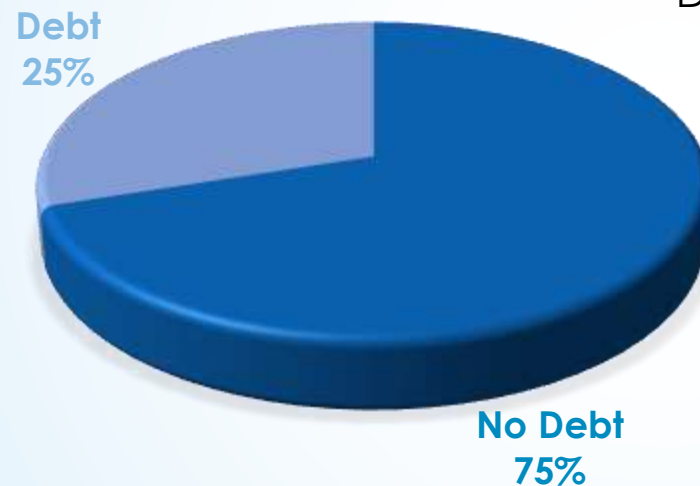
Mid & Small Cap companies are leaders in our portfolio

- ❖ These Cap Stocks offer plenty of upside potential
- ❖ Seek to gain a comparative advantage
- ❖ Lower level of investment risk associated with Mid/Small-sized companies
- ❖ Also they have a proven level of staying power

Market Cap	Count
Large Cap	3
Mid Cap	5
Small Cap	11

Leverage ratio

Out of 20 Stocks in our Holdings only 3 have debt in their book



Debt Free is biggest Valuation for any Firm

High Debt Stocks also have strong Financial base

Fundamentally Strong with Good technical rating

Our Stocks tends to Least Volatile with low financial risk

Top performers

These are the stocks we have invested
Now gave multiple returns in last two years



Benefits of RM

Risk and risk management is an inescapable part of economic activity.

- € Cultivate Risk awareness across the market
- € Easier to identify trouble stock exposure
 - € Helps for better investment
 - € Avoid high loss

Charges

Account
Maintenance Charge
3% + GST
(Annual Fee)

Our Charges



Disclaimer

- Past performance Does Not Guarantee future Performance, Kindly note Investing involve risks, the Value of the Investment will fluctuate time to time based on Market
- Conditions Our Report content to be used and must be used for information purposes only, it is important to do own research before making investment based decisions
- All Financial Opinions Expressed in this report are from Personal Financial Research and Experience Although Best efforts are made to make the information accurate., unintended errors or mis prints may occur
- Risk Assessment of the portfolio will different from Client to Client and suitability will change according to the client appetite The investments discussed or recommended in the market analysis, research reports etc., may not be suitable for all
- Investor statement declaring that there is an inherent risk in investing, and that the party facilitating the investment does not provide any guaranteed return on any investments made