



Purnartha

EQUITY RESEARCH AND INVESTMENT ADVISORY

PORTFOLIO MANAGEMENT SERVICES

What is good for my family and me is what we
recommend to our clients, true to the philosophy of
'Vasudhaiva Kutumbakam'.

PURNARTHA

[THE FIRST STEP IN A FRESH, NEW DIRECTION]

Purnartha started out on a journey with the simple intention of bridging the gap between what was and what could be. A simple goal that has created and nurtured a unique equity investment advisory ecosystem, backed by the timeless concepts of trust, transparency and quality relationships.

Our growing family of domestic and overseas clients has been the best reinforcement that we have set out on the right path with doing the right things for our clients !

Our journey, guided by the vision of 'Vasudhaiva Kutumbakam' – doing for our clients what we would do for ourselves – has inspired us to take the next big step in our journey to create wealth for our clients. Keeping the client at the core of our universe. And doing all that we can to help our clients achieve their financial goals.

Today, we have taken the next big step with the launch of Portfolio Management Services – with an aspiration to outperform the NIFTY 500 index in the long run. By being eclectic and choosing the best that the stock markets have to offer and invest for the long term.

Over the years, Purnartha has consistently outperformed benchmarks such as NIFTY 500 and helped several families grow and prosper together with research-backed, clear and unbiased advice.

[THE CORE THEME]

By keeping the client at the centre of our universe, we create.

By bringing together ethics with profits, we grow.

By building wealth for our clients we enrich.

By managing clients as family, we connect.

By using intensive research to provide long-term gains, we create journeys that accomplish growth.

[OUR INVESTMENT PHILOSOPHY]

Our Investment Approach is to build a broad-based portfolio of selected Equities of Companies based on our very robust research process. Typically, we hand-pick stocks of:

- Companies that are likely to show volume growth typically across all cycles
- Companies having owners' skin in the game
- Companies that have strong balance sheet

We are market cap agnostic and sector agnostic and we typically create a "Multi-Cap Portfolio" with a potential for growth.

Purnartha, its directors and employees have full conviction in its investment philosophy and invest in the same securities that are recommended for the clients.

[RESEARCH PROCESS]

We aim to build a broad-based portfolio of selected Equities of Companies based on our very robust research process, comprising:

History

We would look at operating history that shows performance including positive cash flows across business cycles.

Business Model

We would analyse why the company does not depend upon large borrowing to grow its business (excluding BFSI sector).

Volume Growth

We would also articulate what are the structural drivers for the volume growth of the company for the next few years.

Management Interaction and Channel Checks

Good history and the reason why the company is poised to grow is the output of the business owners thought process and interest. We would identify the person responsible for the company's future & find out if his interests are aligned for future growth.

Valuation

We will build a portfolio that is suitable, based on internal valuation matrix.

[LEADERS]

Introducing the team that passionately roots out the best the market has to offer.
Introducing, the people of Purnartha.



[RAHUL RATHI]

Chairman and Principal Officer

Our overall extraordinaire-in-chief, Rahul Rathi has 15 years of investment and risk management experience gained from working with global investment institutions. His professional and personal legacy of creating phenomenal wealth in the stock market has inspired Purnartha's fundamental investment philosophies. With a Master of Science in Industrial administration from Carnegie Mellon University, USA and a Polymer Engineering degree from the University of Pune, from the University of Pune, Rahul has groomed and led a qualified and experienced research team with a stellar performance track record.

[RAGHU SUNDARAM]

Director

An IIM graduate with a PhD from Cornell University, Raghu Sundaram is the Dean, New York University's Stern School of Business. He has worked with major Wall Street firms and possesses an incomparable background in derivatives and credit research, providing finesse to the equity research at Purnartha.

[HEMANT VISPUTE]

Managing Director

As our Managing director, Hemant Vispute brings over 20 years of experience in consulting, strategic planning and operations. The brain and heart of Purnartha, he has been an integral part of the journey from the very beginning. His leadership, vision and discipline has infused our teams with strategic guidance, helping conceptualize blueprints related to business development and expansion aspects that have seen Purnartha extend its reach across India and overseas.

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Purnartha

Purnartha Investment Advisers Pvt. Ltd
Equity Research & Investment Advisory

“We partner with our clients in their wealth creation journey by choosing the right stocks that could generate good returns in the long run.”

WE PROVIDE PORTFOLIO MANAGEMENT SERVICES

**We are registered as Portfolio Managers with SEBI
Registration No. INP000007021 dated 23rd July 2020**

Pune :

32/33 Rachna,
Dr Ketkar Road, Off Karve Road,
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