Achieve your
investment goals with

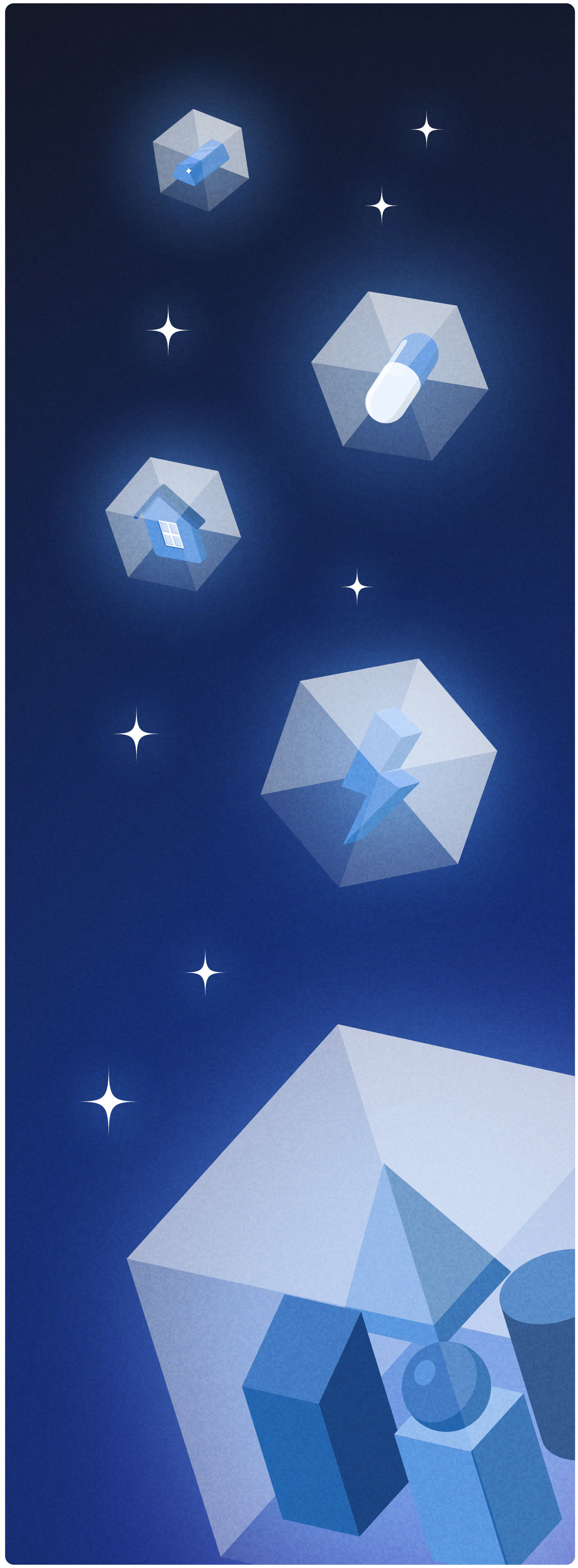
Premium smallcases

What Are Premium smallcases?

Premium smallcases represent curated portfolios of securities, including stocks, ETFs, REITs, etc. These portfolios are crafted by SEBI-registered professionals utilizing robust research methodologies. Aimed at catering to a wide spectrum of investors, premium baskets can be opted by users with varied risk tolerance and investment goals. They are made available to you through the smallcase platform, enabling accessible, research-backed investment opportunities.

Who Creates These smallcases?

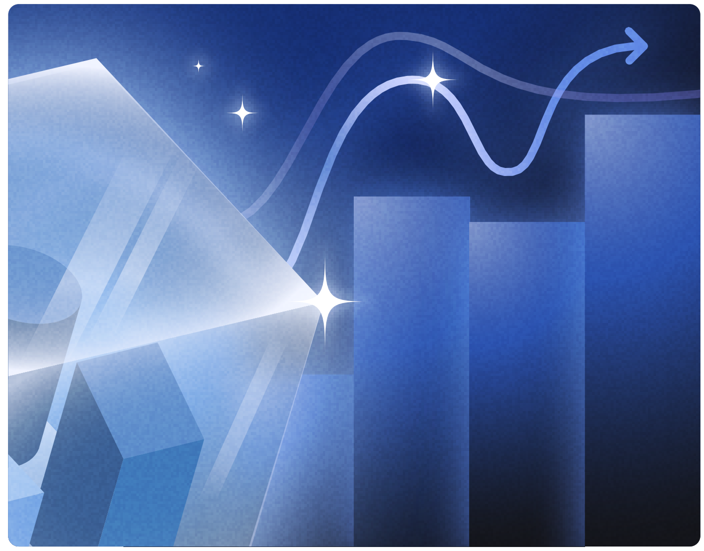
The architects behind premium smallcases are SEBI-registered professionals, commonly known as smallcase managers. These individuals are seasoned experts with extensive experience in equity markets. By leveraging tested investment strategies, quantitative models, and qualitative assessments, they design and manage portfolios that optimize risk-adjusted returns.



Performance Metrics & Transparency

Financial ratios and performance metrics, including CAGR, PB Ratio, PE Ratio, and Sharpe Ratio among others are available on the platform. Investors can access these details on the website against each smallcase.

Take me to Platform



Why Invest in Premium smallcases?

1 **Diversification**

Reduces unsystematic risk by including multiple stocks, protecting against sector or stock-specific volatility.

2 **SIPs**

Enables disciplined investing through Systematic Investment Plans, mitigating market timing risks.

3 **Convenience**

Fully digital process with minimal setup, allowing investments with a few clicks.

4 **Strategic Options**

Diverse strategies cater to varied goals like growth, income, or risk management.

5 **Flexibility**

Dividends are credited directly to the investor’s account.

6 **Ease of Tracking**

Integrated dashboards allow for real-time performance monitoring.

7 **Niche Opportunities**

Access to specialized themes or underrepresented sectors.

Alpha Masters of the Street Fundamental

A flexicap portfolio which strikes balance between risk and reward by investing across market cap.

Key Features

Fees Per Annum **2.50%** of **inv. value** + 18% GST subscription fees deducted monthly **₹5,900** advance fee adjusted against monthly subscription fee	Min Amount **₹2,00,000** Review Frequency **Need Basis**
Strategy **Quality, Growth**	Volatility **Medium**

Holdings Distribution

- Large Cap: **56.1%**
- Mid Cap: **18.2%**
- Small Cap: **24.1%**
- Gold: **0.0%**
- Debt: **1.6%**

Overview

Investment Philosophy

- Follows a flexicap strategy, investing across large, mid, and small-cap companies
- The core philosophy revolves around identifying high-quality, high-growth companies while maintaining an optimal balance between risk and reward.
- The goal is long-term wealth creation through a disciplined and flexible investment approach without any sectoral bias.

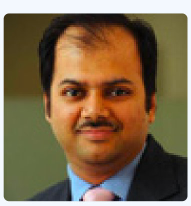
Key Characteristics

- Focuses on companies with strong competitive advantages, high ROCE, and leadership in their industries.
- Allows allocation across industries, benefiting from secular trends and cyclical opportunities.

Research Approach

- Uses fundamental analysis to identify industry-leading companies with sustainable competitive advantages and high long-term growth potential.
- Focuses on macro trends and sectoral rotation, investing in companies poised to benefit from favorable economic cycles.
- Regular rebalancing to retain strong performers and adjust sectoral exposure based on changing market conditions.

About Manager



Investment Advisor
Renaissance Smart Tech

Managed by
Pankaj Murarka

SEBI Registered
INA000016436

Experience
25+ years

Renaissance Smart Tech provides portfolios with long only strategies in Indian Equity market. Every portfolio is crafted keeping in mind client's expectation from investment. All stocks are selected & weighted periodically to deliver superior risk adjusted returns to clients consistently over medium to long term.

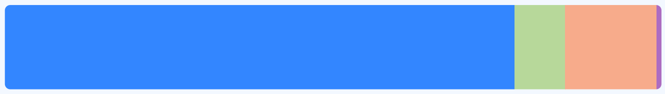
Alpha Core & Satellite Fundamental

A selection of competitive stocks that aim to give you superior risk adjusted returns.

Key Features

Fees Per Annum **2.50%** of **inv. value** + 18% GST subscription fees deducted monthly **₹7,375** advance fee adjusted against monthly subscription fee	Min Amount **₹2,50,000** Review Frequency **Need Basis**
Strategy **Quality, Growth**	Volatility **Medium**

Holdings Distribution



- Large Cap: **77.6%**
- Mid Cap: **7.7%**
- Small Cap: **13.8%**
- Gold: **0.0%**
- Debt: **0.9%**

Overview

Investment Philosophy

- Follows a Core & Satellite investment strategy, combining long-term wealth creation with tactical opportunities in the market.

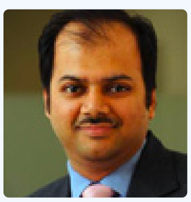
Key Characteristics

- Focuses on companies with strong competitive advantages, high ROCE, and leadership in their industries.
- Allows allocation across industries, benefiting from secular trends and cyclical opportunities.

Research Approach

- Uses fundamental analysis to identify industry-leading companies with sustainable competitive advantages and high long-term growth potential.
- Focuses on macro trends and sectoral rotation, investing in companies poised to benefit from favorable economic cycles.
- Regular rebalancing to retain strong performers and adjust sectoral exposure based on changing market conditions.

About Manager



Investment Advisor
Renaissance Smart Tech

Managed by
Pankaj Murarka

SEBI Registered
INA000016436

Experience
25+ years

Renaissance Smart Tech provides portfolios with long only strategies in Indian Equity market. Every portfolio is crafted keeping in mind client's expectation from investment. All stocks are selected & weighted periodically to deliver superior risk adjusted returns to clients consistently over medium to long term.

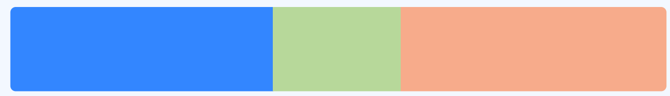
Marcellus MeritorQ- AuA based Fee plan Quant

A Rules-Based Strategy which seeks to identify Quality companies that are relatively Undervalued.

Key Features

Fees Per Annum **2.25%** of **inv. value** + 18% GST subscription fees deducted monthly **₹1,179** advance fee adjusted against monthly subscription fee	Min Amount **₹4,37,310** Review Frequency **Need Basis**
Strategy **Quantitative, Value**	Volatility **Medium**

Holdings Distribution



Large Cap: **40.1%**
Gold: **0.0%**
Mid Cap: **19.4%**
Debt: **0.0%**
Small Cap: **40.5%**

Overview

Investment Philosophy

- Avoids stocks that appear undervalued but have poor fundamentals.
- Uses a structured, rules-based methodology to remove bias.

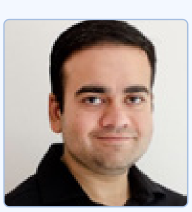
Key Characteristics

- Relatively undervalued stock selection, avoiding businesses with weak fundamentals.
- Strict risk management to avoid downside from fundamentally weak stocks

Research Approach

- Fundamental screening to filter high-quality businesses with strong financials & governance.
- Valuation filters to identify mispriced opportunities while avoiding deep-value traps.
- Factor-based ranking using historical data to optimize the portfolio.
- Rules-based portfolio construction to ensure consistency and objectivity in stock selection.

About Manager



Investment Advisor
Marcellus

Managed by
Manish Hemnani

SEBI Registered
INA000017204

Experience
10+ years

Manish comes from quantitative data analytics and research background, and has more than 12 years of experience working with banks and financial institutions across east-Asia, India and Europe. Prior to founding Marcellus, he founded Crosstab Limited (2011), a London based quantitative data analytics outfit. Prior to that he worked with a Mumbai based boutique analytics consulting firm. Manish holds an MBA from University of Warwick – Warwick Business School (UK)

 | data as of **7th May 2026**.

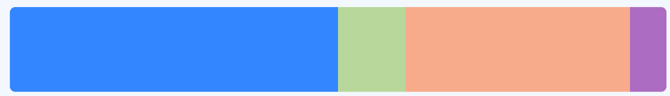
AAA Emerging Business Opportunities Fundamental

Portfolio of companies that are big beneficiaries of secular trends in the sector.

Key Features

Fees Per Annum **2.50%** of **inv. value** + 18% GST subscription fees deducted monthly **₹1,845** advance fee adjusted against monthly subscription fee	Min Amount **₹4,27,918** Review Frequency **Need Basis**
Strategy **Momentum, Quality, Growth**	Volatility **High**

Holdings Distribution



Large Cap: **50.0%**
Mid Cap: **10.3%**
Small Cap: **34.1%**
Gold: **0.0%**
Debt: **5.6%**

Overview

Investment Philosophy

- Aims to capture long-term growth by investing in emerging business themes shaping India's future.
- Focuses on structural trends like rising consumer demand, digital transfformalisation economic formalization.

Key Characteristics

- Exposure to niche segments with scalable business models and strong earnings visibility.
- Designed for long-term wealth creation through forward-looking sectoral themes.

Research Approach

- Thematic analysis to identify evolving macro trends.
- Stock selection based on growth potential, scalability, and competitive edge.
- Monitoring consumer, tech, and economic shifts to stay ahead of the curve.

About Manager

Investment Advisor
AlfAccurate

Managed by
AlfAccurate Advisors Pvt Ltd

SEBI Registered
INA000015701

Experience
25+ years

Set up by Rajesh Kothari in 2009, AlfAccurate Advisors (AAA) is one of the leading investment management firms in India. Prior to AAA, Rajesh was Fund Manager with DSP MF. He received CNBC TV18 - CRISIL Mutual Fund of the Year Award & Platinum Fund Manager Award for DSP EQUITY FUND.

Care Large & Midcap Fundamental

15 -20 Companies Portfolio from Top 250 Companies by Market Cap

Key Features

Fees Per Annum **2.00%** of **inv. value** + 18% GST subscription fees deducted monthly **₹2,950** advance fees adjusted against monthly subscription fee	Min Amount **₹10,00,000** Review Frequency **Need Basis**
Strategy **Fundamental, Value**	Volatility **High**

Holdings Distribution

- Large Cap: **59.0%**
- Gold: **0.0%**
- Mid Cap: **41.0%**
- Debt: **0.0%**
- Small Cap: **0.0%**

About smallcase

Investment Philosophy

- Invests in a concentrated, high-conviction portfolio.
- Combines stability of large caps with growth potential of mid caps.
- Prioritizes low-volatility, consistent return generation.

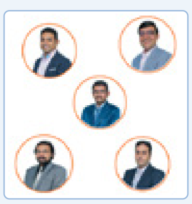
Key Characteristics

- 15-20 stock portfolio from India's top 250 companies by market cap.
- Fundamental stock selection with a focus on long-term wealth creation.

Research Approach

- Thorough fundamental analysis to select financially sound companies.
- Focus on business strength, profitability, and valuation to identify undervalued growth opportunities.

About Manager



Investment Advisor
CARE PORTFOLIO MANAGERS PRIVATE LIMITED
Managed By
Team Care PMS

SEBI Registered
INA000017444

Experience
15+ years

We are a Team of Experienced Chartered Accountants with a common vision of creating wealth for our investors through investments into Indian Listed Equities. Our core investment team is led by Mr. Jayant Mamania (CIO & Fund Manager) with a rich experience of more than 25 years into Research and Fund Management.

 | data as of **7th May 2026.**

Care Growth Plus Value Fundamental

Invest in companies with higher exposure towards SmallCaps with a long-term vision of 3-5 years.

Key Features

Fees Per Annum
2.50% of **inv. value** + 18% GST
subscription fees deducted monthly

₹2,950 advance fees
adjusted against monthly subscription fee

Min Amount
₹10,00,000

Review Frequency
Need Basis

Strategy
Fundamental, Growth

Volatility
High

Holdings Distribution

Large Cap: **8.0%**
Mid Cap: **15.0%**
Small Cap: **76.0%**
Gold: **0.0%**
Debt: **1.0%**

About smallcase

Investment Philosophy

- Investing in companies with strong fundamentals and growth potential that are available at a reasonable valuation.
- Excludes sectors like distilleries, meat, leather, and tobacco.
- Prefers companies with low debt and strong cash flow generation.

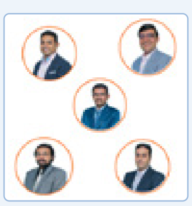
Key Characteristics

- Concentrated portfolio of 18-20 stocks, with higher allocation to top 5-8 holdings.
- Small-cap bias but invests across market caps based on merit.
- Bottom-up stock selection for long-term wealth creation.
- Avoids highly leveraged businesses to ensure financial stability.

Research Approach

- Fundamental analysis-driven selection focusing on strong financials, profitability, and cash flows.
- Long-term growth potential assessment rather than short-term price movements.

About Manager



Investment Advisor
CARE PORTFOLIO MANAGERS PRIVATE LIMITED

Managed By
Team Care PMS

SEBI Registered
INA000017444

Experience
15+ years

We are a Team of Experienced Chartered Accountants with a common vision of creating wealth for our investors through investments into Indian Listed Equities. Our core investment team is led by Mr. Jayant Mamania (CIO & Fund Manager) with a rich experience of more than 25 years into Research and Fund Management.

How to Subscribe & Invest in smallcases?

1. Log in to your Fundzbazar (Prudent) account through the **FundzBazar app** or **https://smallcases.fundzbazar.com/**
2. Choose a smallcase to subscribe to & click **Subscribe Now**
3. Select a plan and enter your details, including **PAN, DOB, phone number, etc.**
4. Complete your risk profiling & sign the agreement using **Aadhaar-based OTP**
5. Create a bank mandate using debit card/ net banking and complete the subscription fee payment
6. Click on **Invest Now**. Confirm the amount to invest, for the chosen smallcase
7. Place orders, set up SIP and start tracking your investment