



# Invest Smart Build Wealth Secure Future

Your Trusted Partner on the Investment Journey



Performance  
Tracking

Portfolio  
Analysis

Wealth  
Management

Risk &  
Returns

Portfolio  
Rebalancing

Asset  
Allocation



# We are your Trusted partner on your Investment Journey

Turning your Investment DNA to a super being  
with **Experience and Technology.**

Creating wealth since

**30** *years*  
**+**

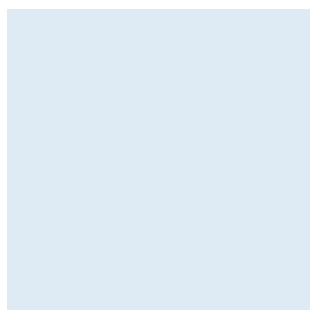
# Customer Centricity, Integrity and Sustainability

Bonanza Group was founded in the year 1994.

With a vision to make investing simpler,  
transparent and easily accessible for all.

Bonanza offers a one-stop solution for all wealth management needs, including equity, mutual funds, and depository services. With 700+ outlets and services in 600+ cities across India, Bonanza's widespread presence is increasing every year.

700+  
OUTLETS

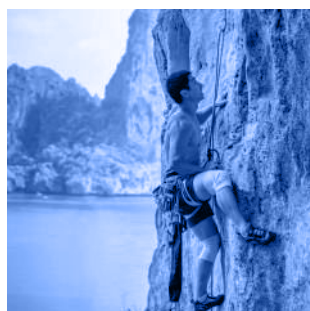


Strong infrastructure with

1200+  
TRADING  
TERMINALS

Team of

850+  
PROFESSIONALS



250+  
CITIES



500000+  
SATISFIED CLIENTS

24x7  
SERVICE AND  
SUPPORT

# Our Leaders

# Our Mentors

# Our Founders



## Satya Prakash Goel

The Founder Director of Bonanza who has been instrumental in chartering critical and strategic initiatives for the company. With 25 yrs of experience in the finance business, Mr. Goel has also been appointed as the director of the OTC Exchange of India. He represented NSEIL for the SEBI constituted Dr. J R Verma Advisory committee for the development of the derivatives market in India.



## Shiv Kumar Goel

Mr. Goel is a CA and CS by profession, and has nearly 35+ years' experience in financial services business. Mr. Goel, founder director, looks after technology, operations and RMS functions of the Company. He has been associated in the industry as President of Commodity Participants Association of India (CPAI). He has represented CPAI on the Commodity Derivative Advisory Committee of SEBI as well as on Risk Management Committee of SEBI. He is also a Member of the Advisory Committees NSE Clearing Limited.



## Vishnu Kumar Agarwal

The Founder Director of Bonanza with over 30 years of experience in bullion, commodity and real estate market. Mr. Vishnu has proficiently taken charge of Administration and Real Estate Investments Initiatives for all the group companies of Bonanza.



## Surendra Kumar Goel

Mr. Goel has been Bonanza's Founder Director and a prominent CA for more than 35 years. He has been mainly looking after growth and development of Bonanza's northern and eastern zone. He was formerly with the Modi's & Oswal's- one of the leading manufacturing companies in textiles.

# Bonanza Group

Our Group is a conglomerate of distinct services, each managed under a unified brand while offering specialized expertise in their respective areas.

Proud  
owner of

**Bonanza Commodity Brokers Pvt. Ltd.**

(Member: MCX, NCDEX)

**Bonanza Medical Tourism Pvt. Ltd.**

**Sunglow Fin Invest Pvt. Ltd.**

**Bonanza Portfolio (IFSC) Pvt. Ltd.**

**Bonanza Build Tech Pvt. Ltd.**

**Endura Soft Solution Pvt. Ltd.**

**Bonanza Bullion Pvt. Ltd.**



# Awards and Recognition

Throughout our journey in wealth management and financial expertise, we have celebrated numerous moments of happiness and success.

Our team's dedication and proficiency have earned us several accolades and achievements, highlighted below:

## ▶ 2024

Recognized as **one of Best Brands in BFSI Segment**

Received Indian Affairs **Most Promising Wealth Management Company** of the year 2024

## ▶ 2013

Ranked 3rd in terms of trading terminals

Top 3 in **Best Equity Brokers**

# 1 Valuable **Financial Advisory & Stock Broking Company**

## ▶ 2012

**Top Equity Retail Performer**

**India's no 1 financial advisory** and stock broking company as per Business Leadership Awards

## ▶ 2008

Ranked amongst top 3 **best equity brokers** by UTIMF & CNBC TV 18

Top 3 **National Level Financial Advisors** – UTI MF & CNBC TV 18

Top Equity Broking House

**Major Volume Driver** BSE ('04-05 to 07-08)

Top 4 Commodity Segment – Bloomberg UTV



## ▶ 2019

**Excellent Depository Services** by CDSL

25 years with NSE

## Top 10 Best Performing PMSes in April

AMC	Strategy Name	Category	1-month returns
KOTAK	PHARMA	PHARMA	13.39%
SAGEONE	SMALL & MICROCAP	SMALL & MICROCAP	12.72%
ANVIL WEALTH MANAGEMENT PRIVATE LTD	LONG HOLDING STRATEGY	LONG HOLDING STRATEGY	12.44%
MASTER PORTFOLIO SERVICES	VALLUM INDIA DISCOVERY	VALLUM INDIA DISCOVERY	11.74%
BONANZA	VALUE	VALUE	11.56%

AMC	STRATEGY NAME	1 Year	Appraisal
GREEN PORTFOLIO	SUPER 30	136%	
COUNTER CYCLICAL INVESTMENT	LONG TERM VALUE INVESTMENT	121%	
RIGHT HORIZONS	MINERVA INDIA UNDER-SERVED	91%	
CARE PORTFOLIO MANAGERS	GROWTH PLUS VALUE	71%	
AEQUITAS INVESTMENT CONSULTANCY	INDIA OPPORTUNITIES PRODUCT	71%	
ARIHANT AMC	ELECTRUM LAUREATE PORTFOLIO	61%	
BONANZA	EDGE	60%	
NEGEN CAPITAL	SPECIAL SITUATIONS & TECHNOLOGY FUND	57%	
GREEN LANTERN CAPITAL LLP	GROWTH FUND	55%	
IJ ASSET MANAGEMENT	MULTICAP	52%	

Source: PMSBoazar

## TOP PERFORMING PMSes IN JULY

AMC	Strategy Name	Category	July Return (%)
Right Horizons	Minerva India Under-Served	Small Cap	22.95%
Aequitas Investment Consultancy	India Opportunities Product	Small Cap	14.98%
Green Lantern Capital Llp	Growth Fund	Small Cap	14.62%
Bonanza	Value	Multi Cap	14.41%
Icici Pru	Pipe	Small Cap	13.30%
Care Portfolio Managers	Growth Plus Value	Small & Midcap	13.20%
Agreya Capital Advisors Llp	Agreya Concentrated Value Discovery Strategy	Multi Cap	11.85%
Centrum Pms	Micro	Small Cap	11.63%
Qed Capital Advisors Llp	Alphabets	Large Cap	10.51%
Abakkus Asset Managers Llp	Abakkus Emerging Opportunities Fund	Small & Midcap	10.50%
Valentis Advisors	Rising Star Opportunity	Small & Midcap	10.40%
Alchemy	Alchemy Leaders	Large Cap	10.20%
Green Portfolio	Dividend Yield	Thematic	10.10%

Source: PMSBAZAAR.COM



## Top performing PMS schemes of January 2024



PMS Fund	Category	Returns in January
Invasset Growth Pro Max Fund	Multicap	17.1%
Asit C Mehta Ace Midcap	Midcap	16.9%
Molecule Growth	Smallcap	16.3%
Asit C Mehta Ace Multicap	Flexicap	16.2%
Wright Alpha Fund	Flexicap	15.2%
Bonanza Value	Multicap	14.1%
Systematix Dynamic Investment Portfolio	Multicap	14.0%
Wright Factor Fund	Flexicap	13.7%
Capitalmind Adaptive Momentum	Multicap	13.2%
Moneylife Mas Prime	Multicap	12.9%
Asit C Mehta Ace Regular Income	Multiasset	12.4%
Bonanza Edge	Multicap	12.3%
Qed Capital Alphabets	Small & Midcap	12.0%
Green Portfolio Dividend Yield	Thematic	11.9%
Wright Factor Fund - Hedged	Flexicap	11.3%
Badjate Aggressive	Small & Midcap	11.1%
O3 Securities Special Situations Portfolio	Smallcap	11.1%
Carnelian Yng Strategy	Multicap	11.0%
Green Portfolio Super 30 Dynamic	Thematic	10.8%
Motilal Oswal Multifactor Equity	Large and Midcap	10.7%
Green Portfolio Impact ESG	Thematic	10.5%
Icici Securities Ace Equity Portfolio	Multicap	10.2%

## Six-month performance of PMS strategies

These mostly contain mid and smallcap focussed strategies, highlighting the outperformance of broader market stocks in the period.

AMC	STRATEGY NAME	AUM (in Rs cr)	CATEGORY	6-Month returns
VALENTIS ADVISORS	RISING STAR OPPORTUNITY	Undisclosed	SMALL & MIDCAP	68.05%
ROHA ASSET MANAGERS	EMERGING CHAMPIONS	Undisclosed	SMALL & MIDCAP	65.05%
NINE RIVERS CAPITAL	AURUM SMALL CAP OPP.	Undisclosed	SMALL CAP	61.32%
CARE PORTFOLIO MANAGERS	GROWTH PLUS VALUE	436	SMALL & MIDCAP	56.30%
ABAKKUS ASSET MANAGERS LLP	ABAKKUS EMERGING OPPORTUNITIES FUND	Undisclosed	SMALL & MIDCAP	55.90%
CARNELIAN ASSET ADVISORS	SHIFT STRATEGY	Undisclosed	MULTI CAP	54.29%
BONANZA	VALUE	Undisclosed	MULTI CAP	52.26%

In the last 5 years, Green Lantern's Growth Fund, Bonanza's Edge, and Sameeksha's India Equity Fund have performed well.



(Disclaimer: Recommendations, suggestions, views, and opinions given by the experts are their own. These do not represent the views of The Economic Times)





Computation & powered by



**Bonanza Multi Cap PMS Scheme has been Rated 3 Stars** for the year 2021-22 by CRISIL in PMS Bazaar



Proud moment for Bonanza for being recognized as **one of the Best Brand in BFSI Segment**

**Bonanza receive Indian Affairs Most Promising Wealth Management Company** of the year 2024 hosted by INDIA LEADERSHIP CONCLAVE 2024.



Bonanza SPOP



- Bonanza Growth
- Bonanza Value
- Bonanza Edge
- Bonanza Multicap
- Bonanza Aegis





## Achin Goel

Fund Manager

With over 14 years of hands-on experience in the capital markets, Achin is not just a fund manager — he's a visionary in wealth strategy, trusted by HNIs and institutions alike. At the helm of Bonanza's PMS vertical, he manages ₹350+ crore in client assets with a razor-sharp blend of conviction and research-led precision. Educated at ICT Mumbai and Eastern Michigan University, with designations including CFA, CFP, and PGDRM, Achin blends global perspectives with Indian market depth. From leading Bonanza's online broking expansion to overseeing its research, technical, and fundamental strategy teams, he has worn many hats — each with excellence. His edge? The ability to spot early signals in noise — unearthing turnaround stories, discovering high-growth disruptors, and mapping them against deep sectoral analysis. His focus spans India's economic engine: healthcare, IT, renewables, infra, and defense. But what sets Achin apart isn't just the process — it's the principle. He backs earnings, not euphoria. He respects capital, avoids leverage, and thrives on disciplined rebalancing even in turbulent times.

### Core Team



Kulwant Kumar



Avinash Rathod



Rajesh Sinha

### Product Team



Pournima Botle



Ashish Sanghavi



Dhara Shah

# Bonanza PMS Team



# Reasons To Count On Bonanza's Portfolio Management Service


Our expert analysts of the portfolio management team are continuously working on identifying businesses that present strong growth potential at the current valuations.


- ✓ **END-TO-END SUPPORT**
  - ✓ **EXPERIENCED INVESTMENT TEAM**
  - ✓ **UTMOST FLEXIBILITY**
  - ✓ **TRANSPARENCY**
- 
- Three thick, curved green lines that sweep upwards and to the right from the bottom right corner of the page, creating a sense of upward momentum.



## CONTACT US

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