

BONANZA PMS – Fact Sheet

PULSE SECTOR STRATEGY

Inception Date: 02.02.2025 | Fact Sheet as 31.03.2026



INVESTMENT APPROACH

Strategy Name: Pulse Sector Strategy

Investment Objective:

The Bonanza Pulse Portfolio follows a disciplined investment approach focused on identifying sectors with the potential to outperform the broader market. Since market leadership is typically limited to a few sectors at any given time, the strategy aims to capture these opportunities using a combination of technical indicators, relative strength, and fundamental validation, with emphasis on sector rotation and selective stock picking.

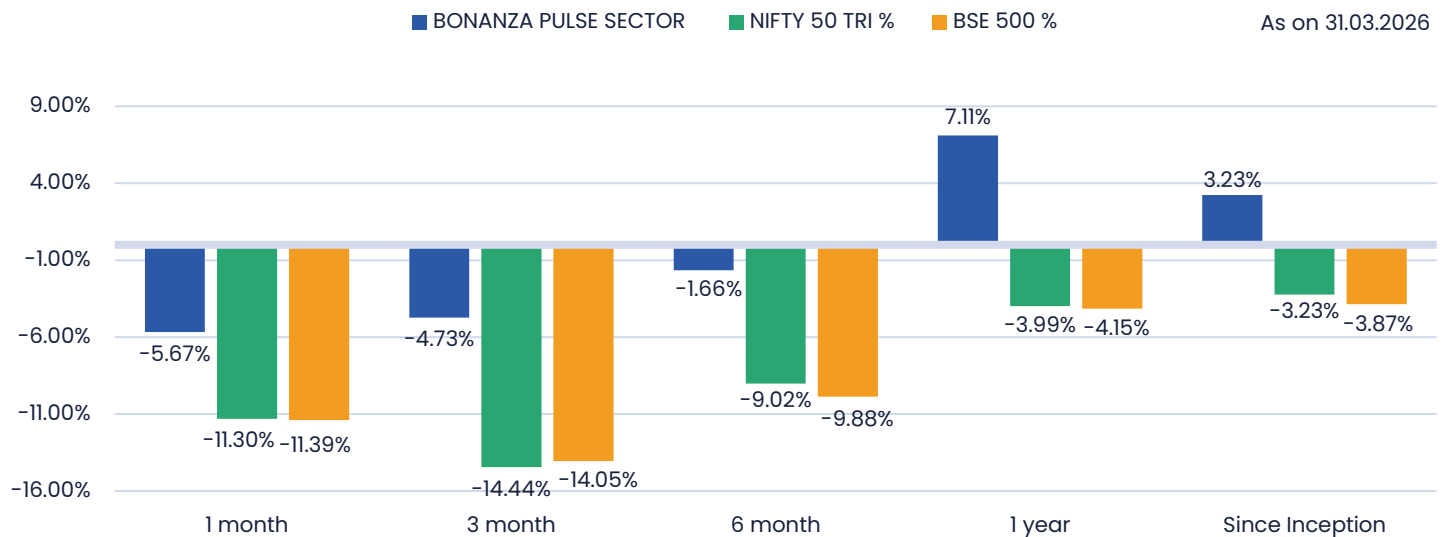
Benchmark:: Nifty 50 TRI

Investment Horizon: 5 year

KEY FEATURES & PORTFOLIO ATTRIBUTES

- Actively managed portfolio with flexibility to realign investments based on changing market conditions.
- Focus on stocks showing strong price trends and momentum, supported by sound business fundamentals.
- Investment decisions are primarily driven by technical analysis, with fundamentals used as a validation tool.
- Clearly defined risk management framework with a fixed stop-loss of 15% per stock.
- Exposure to any single stock is limited to 5% of the portfolio to manage concentration risk.
- Sector allocation is capped at 20–25%, ensuring diversification while capturing sector-specific opportunities.

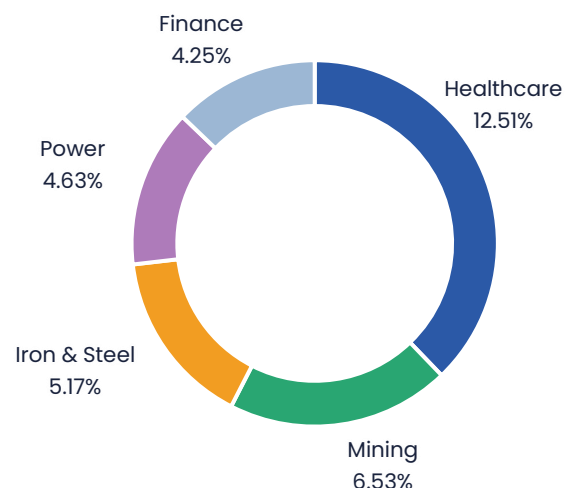
STRATEGY PERFORMANCE SINCE INCEPTION Vs BENCHMARK*



TOP 5 HOLDINGS (as on 31.03.2026)

1	COAL INDIA LTD	3.73%
2	IPCA LABORATORIES LTD	3.51%
3	NTPC LTD	3.31%
4	J & K BANK LTD.	3.12%
5	POWER FIN CORP LTD.	3.02%

TOP 5 SECTOR ALLOCATION



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RISK RATIO		
1 Year Data	Strategy	Benchmark
Standard Deviation	11.40%	10.86%
Beta	0.69	
Sharpe Ratio	-0.25	

ALLOCATION (%)	
Particulars	Percentage
Large Cap	21.17%
Mid Cap	12.07%
Small Cap	9.78%
Cash	56.98%

Disclaimers and Risk Factors: Bonanza Pulse Sector Strategy

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Please Note: Returns up to 1 year are absolute & over 1 year are Compounded Annualized. Returns calculated using Time Weighted Rate of Return (TWRR) at an aggregate strategy level. This document is neither approved, certified nor verified by SEBI. All portfolio related holdings and sector data provided above is for aggregate portfolio. Returns & Portfolio of client may vary vis-à-vis due to various factors viz. timing of investment/ additional investment, timing of withdrawals, specific client mandates, variation of expenses charged & dividend income. Past performance may or may not be sustained in future and should not be used as a basis for comparison with other investments. The Portfolio Manager manages allocations in all client portfolios which is in line with investment objectives of the portfolio strategy/ investment approach. Unless there are specific exclusion instructions by individual clients, all clients' portfolios are aligned which means replication and alignment of all clients' portfolios in terms of scrip and allocation. New clients entering the strategy/ investment approach as of a particular date are also aligned to the aggregate portfolio. Investment in securities is subject to market and other risks, and there is no assurance or guarantee that the objectives of any of the strategies of the Portfolio Management Services will be achieved. For the relative performance of a particular Investment Approach to other Portfolio Managers within the selected strategy, please refer APMI website. Under PMS Provider Name, please select Bonanza Portfolio Limited Company and select your Investment Approach Name for viewing the stated disclosure. The data for the previous month is usually available on the APMI portal on or after the 7th business day of the current month.