

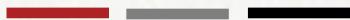


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**IFM** Investment  
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## INNOVATIVE FINANCIAL MANAGEMENT INVESTMENT ADVISORS



Innovative Financial Management Investment Advisors (IFMIA) is a leading Portfolio Management Services (PMS) firm, founded by seasoned investment professionals.



SEBI Reg. No. - INP000009436



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# **LARGE CAP INVESTMENT STRATEGY**



## FUND PERFORMANCE

Period	1 Month	3 Months	6 Months	1 Year	3 Years	5 Years	Since Inception
Fund Return	-3.10%	-2.62%	1.81%	NA	NA	NA	-0.10%
Nifty 50 TRI	-3.04%	-1.45%	2.64%	NA	NA	NA	3.99%
Out / Under Performance	-0.07%	-1.17%	-0.83%	NA	NA	NA	-4.10%
Beta	1.054	1.07	1.11				0.91
Jensen Alpha	0.13%	-0.95%	-0.77%				-4.10%

Data: as on 30<sup>th</sup> January 2026



## RISK ADJUSTED RETURN

PARTICULARS	IFM LARGE CAP STRATEGY	NIFTY 50 TRI
<b>Standard Deviation</b>	<b>9.96%</b>	<b>8.44%</b>
<b>Downside Deviation</b>	<b>6.91%</b>	<b>5.72%</b>
<b>Target Semi - Deviation (Based on Hurdle Rate)</b>	<b>7.14%</b>	<b>5.96%</b>
<b>Target Semi - Deviation (Based on Average Return)</b>	<b>6.92%</b>	<b>5.95%</b>
<b>Beta</b>	<b>0.91</b>	<b>1</b>
<b>Last 6 Months Return</b> (net of Management and Performance Fees)	<b>1.81%</b>	<b>2.64%</b>
<b>Jensen Alpha</b>	<b>-4.10%</b>	<b>-</b>

*Data: as on 30<sup>th</sup> January 2026*



# THANK YOU

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