



IFM Investment advisors

INNOVATIVE FINANCIAL MANAGEMENT INVESTMENT ADVISORS



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

LARGE CAP INVESTMENT STRATEGY



FUND PERFORMANCE

Period	1 Month	3 Months	6 Months	1 Year	3 Years	5 Years	Since Inception
Fund Return	-0.68%	-5.13%	3.22%	NA	NA	NA	-0.90%
Nifty 50 TRI	-0.51%	-3.80%	3.36%	NA	NA	NA	3.46%
Out / Under Performance	-0.17%	-1.33%	-0.14%	NA	NA	NA	-4.36%
Beta	1.07	1.07	1.10				0.96
Jensen Alpha	-0.09%	-0.95%	-0.15%				-4.41%

Data: as on 28th February 2026



KEY PERFORMANCE & RISK METRICS

PARTICULARS	IFM LARGE CAP STRATEGY	NIFTY 50 TRI
Standard Deviation	11.00%	9.54%
Downside Deviation	7.69%	6.62%
Target Semi - Deviation (Based on Hurdle Rate)	7.91%	6.84%
Target Semi - Deviation (Based on Average Return)	7.67%	6.79%
Beta	0.96	1
Last 6 Months Return (net of Management and Performance Fees)	3.22%	3.36%
Jensen Alpha	-4.41%	-

Data: as on 28th February 2026





THANK YOU

IFM INVESTMENT ADVISORS PRIVATE LIMITED

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