

VASUPRADAH INVESTMENT ADVISORY

# EQUITY ADVISORY SERVICES

OUR INVESTMENT PHILOSOPHY

## PROCESS OVER PREDICTION

At Vasupradah, we believe that sustainable wealth creation is the outcome of a disciplined, repeatable process — not speculation or market timing. Every stock that enters our advisory universe undergoes a rigorous multi-layered screening framework before being considered for recommendation.

As a SEBI-registered, fee-only fiduciary investment advisory firm, our interests are structurally aligned with yours. We do not earn commissions or trail fees on the securities we recommend. Our sole compensation comes from the advisory fee you pay us — ensuring that every recommendation is driven purely by merit and suitability.

We offer four distinct advisory baskets, each calibrated to a specific risk profile and investment horizon. The basket assigned to you is determined through a comprehensive risk profiling and suitability assessment, in accordance with SEBI (Investment Advisers) Regulations, 2013, as amended.

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## GOVERNANCE & QUALITY

### OUR SCREENING FRAMEWORK

Every security we recommend passes through a comprehensive, multi-dimensional screening process. Our proprietary filters are applied uniformly across all advisory baskets — ensuring that only companies meeting our stringent standards of financial integrity, governance, and operational quality are considered.

*The specific thresholds and parameters vary by risk category and are calibrated to the investment profile of each basket.*



#### FINANCIAL QUALITY

Revenue growth, profitability, return ratios, and margin stability across defined time horizons



#### BALANCE SHEET STRENGTH

Leverage limits, interest coverage, free cash flow discipline, and capital allocation prudence



#### GOVERNANCE & FORENSICS



#### OPERATIONAL TRACK RECORD

Promoter integrity, pledge checks,  
related-party scrutiny, and forensic  
audit history review

Minimum operating history,  
shareholder pattern analysis, and  
business continuity assessment

#### ADVISORY BASKETS

## OUR EQUITY ADVISORY PRODUCTS

*Each basket is assigned based on individual risk profiling, suitability assessment, investment horizon, and financial goals — as mandated by SEBI.*

# सुरक्षा वित्त — SURAKSHA VITTA

LOW RISK

*Protection of Finance*

Designed for investors who prioritise capital preservation with steady, reliable compounding and minimal portfolio volatility. The selection is confined to high-quality, well-established companies with demonstrated financial stability, consistent cash flows, and a proven track record of shareholder value creation.

Stock selection draws primarily from established large-cap indices with the most stringent fundamental and governance filters in our framework. The focus is on companies with minimal leverage, superior return ratios, and stable or expanding margins — leaders in sectors known for predictable earnings and cash flow visibility.

Capital Preservation Focus

Blue-Chip Quality

Low Volatility

Stable Cash Flows

TAKE THE FIRST STEP

# समान उत्पाद्य — SAMANA UTPADY

*Balanced Creation*

## MEDIUM TO LOW RISK

Built for investors seeking steady capital growth with moderate volatility, blending large-cap stability with select mid-cap growth opportunities. The portfolio targets businesses with demonstrable competitive advantages, predictable revenue streams, and strong earnings visibility.

Stock selection spans a broader index universe while maintaining a significant large-cap allocation. Screening criteria emphasise businesses with a discernible economic moat, healthy balance sheets without heavy capex stress, and diversified revenue sources.

Balanced Growth

Large & Mid-Cap Blend

Competitive Moat

Moderate Volatility

TAKE THE FIRST STEP

# स्थिर सम्पत्ति — STHIRA SAMPATTI

*Stable Assets*

## MEDIUM TO HIGH RISK

Crafted for growth-oriented investors willing to accept short-term volatility in pursuit of superior long-term returns. This basket actively seeks companies in high-growth sectors and scaling businesses with expanding margins, including selectively considered turnaround stories backed by demonstrated execution.

The advisory universe is broad, covering sector leaders across manufacturing, engineering, technology, and emerging industries. Financial screening thresholds are calibrated for growth — allowing for higher leverage where the deployment of debt demonstrably enhances equity returns. Emphasis is placed on expanding operating margins and strong promoter commitment.

Growth Focused

Scaling Businesses

Higher Volatility Tolerance

Execution-Backed Turnarounds

TAKE THE FIRST STEP

# साहस सम्पत्ति — SĀHASA SAMPATTI

HIGH RISK

*Wealth through Boldness*

Designed for investors with a high risk appetite and extended investment horizon, seeking aggressive growth and wealth creation. This basket extends across the full market-capitalisation spectrum — including small-caps, micro-caps, early-stage businesses, and deep cyclicals — applying strict forensic and governance filters to mitigate downside risk while maximising upside potential.

The advisory universe is the widest in our framework, encompassing emerging technologies, new listings with strong growth trajectories, niche engineering and manufacturing plays, and high-traction digital businesses. Financial screening is calibrated for early-stage and high-growth dynamics, with elevated promoter holding requirements for smaller companies and zero tolerance for fraud risk, unexplained related-party transactions, or dilution without growth.

Aggressive Growth

Full Market-Cap Spectrum

Emerging Opportunities

High Conviction

TAKE THE FIRST STEP

# नियमबद्ध प्रक्षेपक योजना — NIYAMABADHA PRAKSEPAKA YOJANA

*Systematic Investment Plan*

## DISCIPLINED INVESTING

Rooted in the principle of disciplined, periodic investing, this approach involves regular, systematic investments into carefully selected securities that demonstrate long-term compounding potential. By spreading investments over time, the strategy naturally averages acquisition costs and harnesses the power of compounding to build wealth progressively.

Each security recommended under this plan passes through our comprehensive screening framework — encompassing fundamental strength, growth trajectory, market standing, and technical analysis — ensuring that the compounding foundation is built on quality. This approach is particularly suited for investors who wish to build wealth methodically without the pressure of timing the market.

Periodic Investment

Cost Averaging

Long-Term Compounding

Quality Screened

TAKE THE FIRST STEP

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IMPORTANT DISCLOSURES & REGULATORY INFORMATION

- Investment in securities market is subject to market risks. Read all the related documents carefully before investing.
- Registration granted by SEBI, membership of BASL, and certification from NISM in no way guarantee performance of the intermediary or provide any assurance of returns to investors.
- Past performance is not indicative of future results. The value of investments and the income derived from them may go down as well as up.
- The advisory baskets described herein represent the general advisory framework and approach employed by Vasupradah Investment Advisory Services Pvt. Ltd. The actual securities recommended for each client may vary based on their individual risk profile, suitability assessment, investment horizon, and financial goals, as determined through our onboarding process in compliance with SEBI (Investment Advisers) Regulations, 2013, as amended.
- Vasupradah Investment Advisory Services Pvt. Ltd. operates as a fee-only investment advisory firm. We do not receive any commission, trail fee, or any form of consideration from any product manufacturer or distributor for the securities recommended under our equity advisory services.
- The screening framework, approach, and selection methodology described on this page are general in nature and may be updated from time to time at the discretion of the firm. These do not constitute a promise or guarantee of any specific investment outcome.
- The information provided on this page is for informational purposes only and should not be construed as investment recommendations, solicitations, or offers to buy or sell any securities.
- Clients are advised to consult separately for their tax and legal matters on investment.

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**Vasupradah Investment Advisory Services Pvt. Ltd.**

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