



## **Wealth management...a fresh perspective**

### **Portfolio Management Service of ICICI Prudential Asset Management Company**

#### **Portfolio Manager:**

The Fund Manager and his brief

**Mr. George Joseph** - George is an Associate Chartered Accountant and an Associate Cost and Management Accountant. He has done his graduation in Commerce from Calicut University.

George has an overall experience of 10 years across industry, especially in the equity and capital markets space, with firms such as DSP Merrill Lynch, Wipro Ltd, Metlife India and Cholamandalam Investment Finance Co Ltd. Prior to being a Portfolio Manager, George was responsible for investment analytics, performance measurement and investment risk management at ICICI Prudential Asset Management Company and was working as a sounding board for all the equity fund managers. In his earlier assignments he has managed equity funds and done equity research.

**Mr. Vinay Sharma** - Vinay is a CFA charter holder and holds Post Graduate Diploma in Computer Aided Management from IIM Calcutta. He has done his graduation in Architecture from MNIT Jaipur.

Vinay has an overall work experience of around 7 years. He has significant experience in Indian equities working as a research analyst and then as a Portfolio Manager in his earlier assignments at JP Morgan India, AIG Global Asset Management and Prudential Asset Management Company (Mutual Fund). At Prudential Asset Management Company (Mutual Fund), he was Fund Manager of the ICICI Prudential Banking and Financial Services Fund.

#### **Name of the Strategy:**

Bottom Up & Top Down

#### **Date of Inception:**

Date of launch of the flagship product

ICICI Prudential PMS – Aggressive Portfolio - Inception date is 22<sup>nd</sup> December 2000



**PMS Category:**

Equity/ Structured/ Hybrid

All

**Strategy Objective:**

Capital growth/regular income/absolute return/capital protection

Absolute Return, Capital Appreciation & Relative Outperformance vis-à-vis benchmarks

**Brief description:**

Medium-term investment of funds having potential for capital appreciation by managing cash and equity portfolio.

**Style of Investment:**

Fundamental driven

**Minimum Amount:**

Rs. 25 Lakhs

**Fee structure:**

Product Specific

**Exit Load:**

Product Specific

**What is unique about the service (not more than 50 words):**

ICICI Prudential Asset Management Company is amongst the pioneer of Portfolio Management Services in India. It is one of the largest PMS providers with an experience spanning over a decade. We have invested substantial bandwidth in catering our customized services to financial requirements of HNIs and UHNIs segment.