

PROGENY

A Portfolio Management Scheme
for Mutual Funds

All of us have seen Mutual Funds advertisements saying..... "Planning for your Child's Future?", "Want to buy a House?", "How are you going to prepare for your child's education abroad?", "Papa, will you help me to be someone big when I grow up?", "Invest early for a bright future".

True, but is it as easy as it appears. Well, probably no.

The world of finance is becoming increasingly complex by the day. The investor today has a plethora of options to choose from. Equity, debt, futures, options etc. are some of them. Even amongst Mutual Funds, there are various options - a diversified equity fund, a sector specific equity fund (IT, Pharma, FMCG, Services, etc), debt funds like Income Funds, Liquid Funds, G-Sec Funds, Money Market Mutual Funds, Monthly Income Funds and Balanced Funds.

Mutual Funds definitely give great flexibility to investors such that one can create and balance a portfolio to suit the risk and return expectations. But, the key to creating wealth over long-term is to select the right funds, keep a constant tab on these investments, identifying what works and what does not in this fast changing world, and change with change.

The quintessential problem, which fund to choose from? India today has over 40 fund houses that offer over 540 different schemes. As can be seen this motley of funds is sure to confuse even the most savvy of investors. Complexity and confusion calls for an explicit investment design.

Progeny - the way out. Progeny is a Portfolio Management Scheme for investment in Mutual Funds. It was registered with SEBI in Dec 2000. Our team of analysts identifies excellence in investment management through cutting edge research of various schemes and fund houses. The team evaluates the performance of a scheme and the consistency of that performance relative to other schemes. Supported by this expertise we make intelligent investments for you in different funds with impressive track record and a disciplined approach. Transparency is given by half- yearly review and yearly audit by Deloitte Haskins & Sells, auditors of international repute.

The methodology we follow. We will interact with you to understand and also help you define your investment goal. Based on these goals we evolve an investment philosophy and strategy suitable to your requirement. Depending on your profile we will invest in mutual funds and therefore structure a portfolio most appropriate for you. We will see that your investment is continuously aligned with your goals and strategy from time to time. We even maintain a proper debt equity ratio to suit the risk profile Of the client and keep his asset allocation in place. Transparency is maintained with weekly updates on your portfolio through the Net.

What is the cost involved?

We charge fixed fee 0.25% per annum of NAV subject to a minimum of Rs. 10,000/-.

Progeny...an excellent way to manage your Mutual Fund Investments.

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