

INVESTMENT OBJECTIVE

Endeavor to consistently generate **ALPHA** by creating “**Bespoke Portfolios & investing in current & Emerging Leaders with a Turnaround Factor**” in common through **Turtle’s quant-based investing process**.

Driven by data, our investment strategy minimizes human bias through a structured, objective process.

INVESTMENT APPROACH

We create **Bespoke Portfolios**, tailoring each investment to meet specific client needs. We continuously Select, Allocate, and Review investments through our Trademark **P.P.P. (Price, Profit, and People)** investment process

PRODUCT FEATURES:

- Seeking personalized investment solution
- Direct Access to the Fund Manager
- Priority Access to Special Situation Opportunity

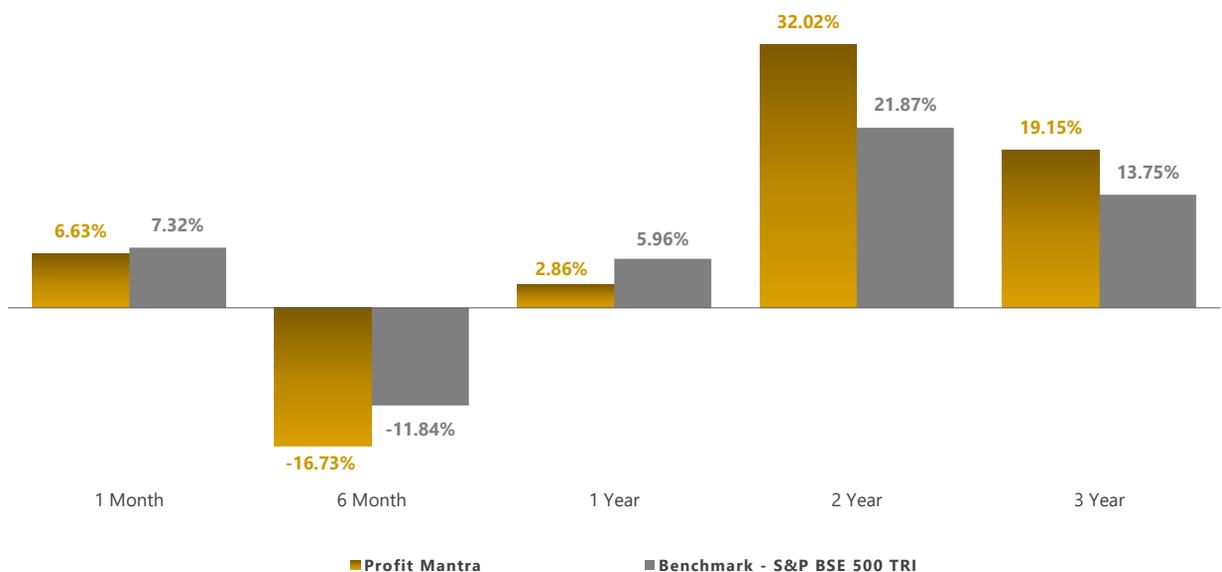
FEES: 0.5% Fixed Fee + 10% Profit Sharing at EOC (End of the Contract)

MINIMUM INVESTMENT: ₹5 Crore

NO OF STOCKS: 25-30

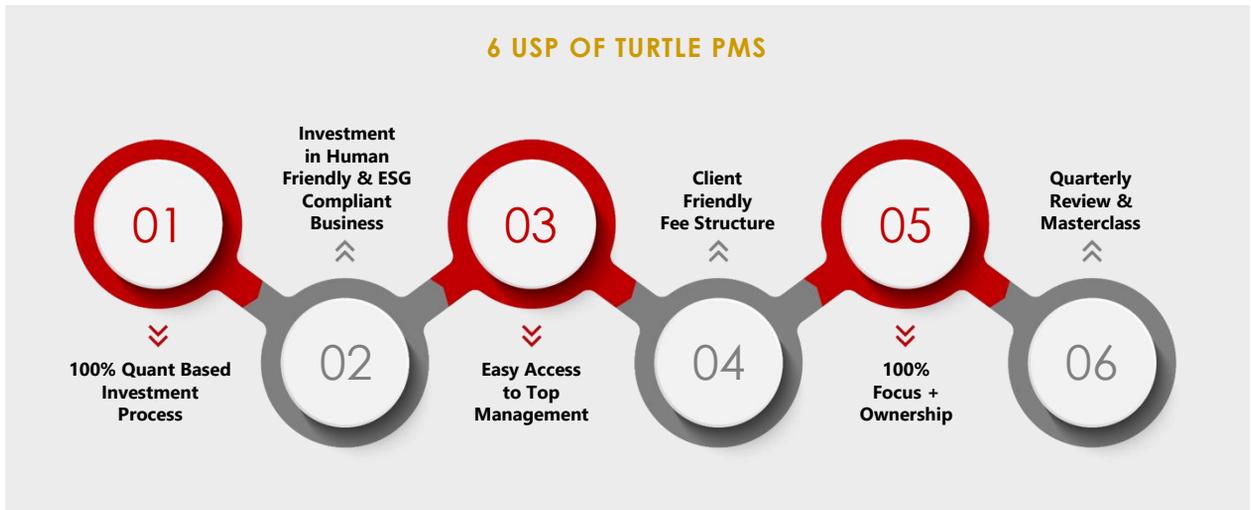
PERFORMANCE CHART

PROFIT MANTRA PMS Fund VS S&P BSE 500 TRI

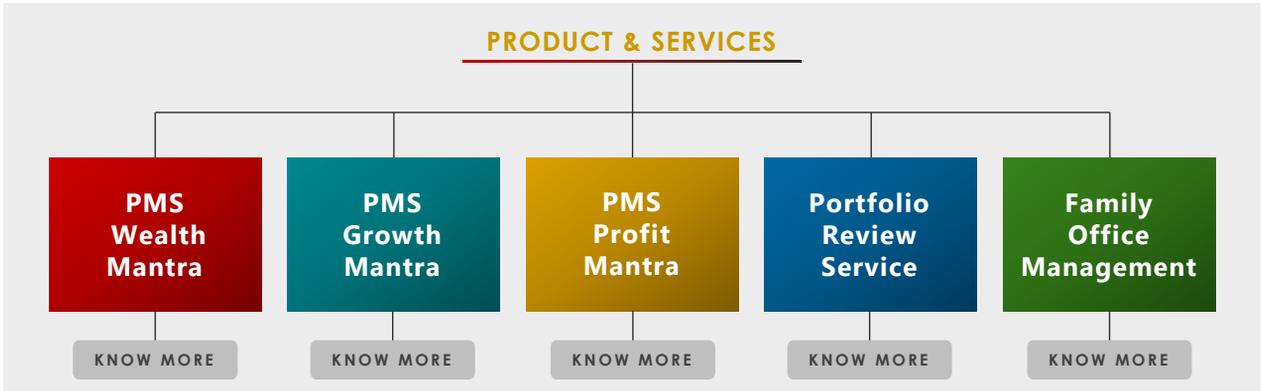


Performance Data is as on March 31, 2025. | Figures are Inclusive of Fees, Taxes and other charges. | Above performance data is not verified by SEBI | Past performance does not guarantee future returns. | SEBI Reg No: INP000006758 | For more details please visit <https://turtlewealth.in/>

6 USP OF TURTLE PMS



PRODUCT & SERVICES



10 Reasons WHY you should NOT Invest with Turtle

[KNOW MORE](#)

DISCLAIMER

Turtle Wealth Management Pvt. Ltd. (hereinafter referred to as "the Company") is a SEBI registered Portfolio Manager, SEBI Reg. No: INP000006758. The registered office of the Company is located at 1001, Rajhans Montessa, Dumas Road, near Airport, Surat, Gujarat 395007. The Company specializes in Portfolio Management Services (i.e. Discretionary and Advisory).

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