

Mr. Mohmaad

Case Study by  MoneyDhan.

Mister Mohammad hired us.

He founded his own Motilal Oswal account with 5 lakh.

MoneyDhan

is a SEBI Reg investment advisor
with a unique offering.

Our distinctive product of derivatives gave a booster of additional rs 46,000 returns.

Extra 9% returns on his capital of the same 5 lakh.

In our strategy, we do far Out of the Money call options writing.

Mister Mohammad hired us. He founded his own Motilal Oswal account with 5 lakh.

This was in October month of the year 2020

today May 2022, one and half years later.

His equity return is just 17,300 rupees.

An 11 thousand profit in stock price + 5 thousand as a dividend.

This 17k is just 3.4% returns on the 5 lakh he kept in his own broker account.

The reason is the flat performance of large-cap equities like HDFC Bank, TCS, HUL, etc.

So far this is similar to what we can expect from a large cap-focused mutual fund or PMS service.

As a professional, we understand that these returns are acceptable given the market correction which we all are witnessing.

Eventually, we are confident that Mohammed's stock portfolio will make up for the lag in upcoming years.

As SEBI Registered Investment Advisor, we(Moneydhan) can advise our client via Email for the derivatives (Futures & Options) segment. Then the client gets it executed by his broker (Motilal Oswal).

We possess This double edge over other traditional products. Even if stocks perform poorly in the coming year, we have the confidence to compensate for this performance with derivatives profit.

We believe these stagnant years like 2022 are giving us a bargain price to accumulate good stocks in your portfolio.

If you hire us at this time, we know we can give an edge to your investments. There is no minimum level of investment. A college student with 10k from his savings is also welcome.

- ***We don't touch your money.***
- ***It stays in your Demat account, we just email.***
- ***We Raise an invoice once a year.***
- ***You pay us from your bank account.***

We don't touch your capital, no need to trust us.

We ask for a 10% profit share. You will pay 10 thousand only if you see 1 lakh profit, that too after a year. (A fair business model).

Equity Only Holdings

Equity ▾

Show 10 ▾ entries

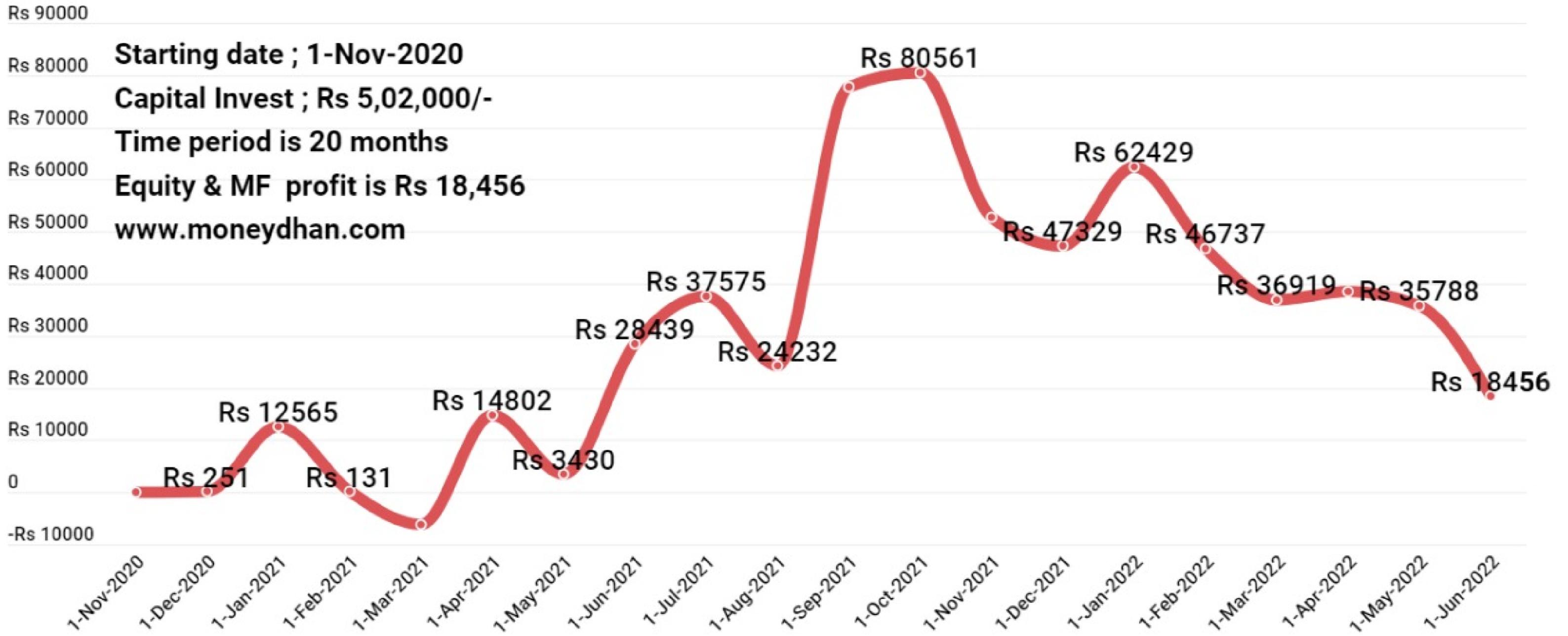
Search:

Instrument Name	Quantity	Purchase Price	Purchase Value	Market Price	Market Value	ST Qty	ST G/L	LT Qty	LT G/L	Unrealised Gain/Loss	Unrealised Gain/Loss%
ASIAN PAINTS LTD	34	2,525.46	85,865.58	3,065.20	1,04,216.80	4	66.46	30	18,284.76	18,351.22	21.37
...	63	518.23	32,648.62	500.80	31,550.40	0	0.00	63	-1,098.22	-1,098.22	-3.36
HCL TECHNOLOGIES LTD	15	946.38	14,195.64	1,054.35	15,815.25	15	1,619.61	0	0.00	1,619.61	11.41
HDFC BANK LTD	98	1,450.28	1,42,127.41	1,291.35	1,26,552.30	16	-2,817.55	82	-12,757.56	-15,575.11	-10.96
...	27	2,300.32	62,108.58	2,194.35	59,247.45	6	-1,069.58	21	-1,791.55	-2,861.13	-4.61
NIPPON INDIA ETF GOLD BEES	238	41.08	9,777.87	43.47	10,345.86	0	0.00	238	567.99	567.99	5.81
TATA ...	26	2,998.92	77,971.85	3,414.90	88,787.40	0	0.00	26	10,815.55	10,815.55	13.87
Total			4,24,695.55		4,36,515.46					11,819.91	2.78

Showing 1 to 7 of 7 entries

Mr. Mohammad ; Equity & MF performance

● Demat long term Equity & MF



Dividend of 5k

Holding summary and performance Since Inception to 14-May-2022 

Individual Portfolio

(Amount in INR)

Member Name	% of Portfolio	Investment Cost	Market Value	Dividend	Unrealised Gain/Loss	Since Inception
				Since Inception	%	XIRR(%)
MOHAMMAD ..	100.00%	547,233.81	559,053.72	5,540.60	134,358.17	2.14%
					2.16%	

Derivatives Profit

Home > Capital Gains > Most > All

Family: Client: MOHAMMAD From: 01 May 2020 To: 15 May 2022

Include Speculative in Short-Term EXCLUDE STT

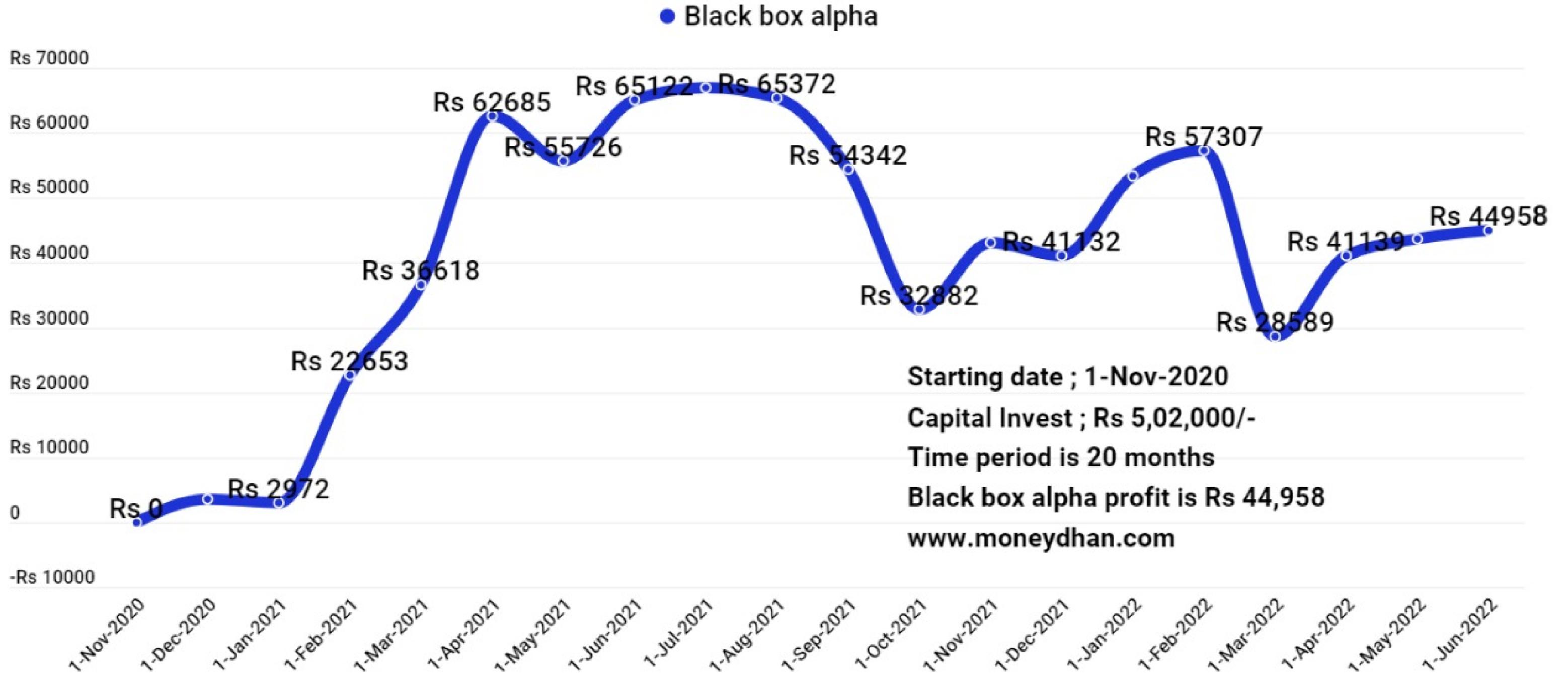
GrandFather GainLoss GrandFather GainLoss

Asset Wise Gain or Loss

Show entries Search:

Sr No.	Product	Interest	Accrued Interest	Dividend	Speculative Gain	ST Gain	LT Gain	Total Gain	STT
1	F & O	0.00	0.00	0.00	48008.73	0.00	0.00	48008.73	819.01

Mr. Mohammad ; Derivatives Black box alpha performance



Net 5 lakh Became

5,59,000+5500 = 5,65,000 (approx)

Holding summary and performance

Since Inception to
14-May-2022



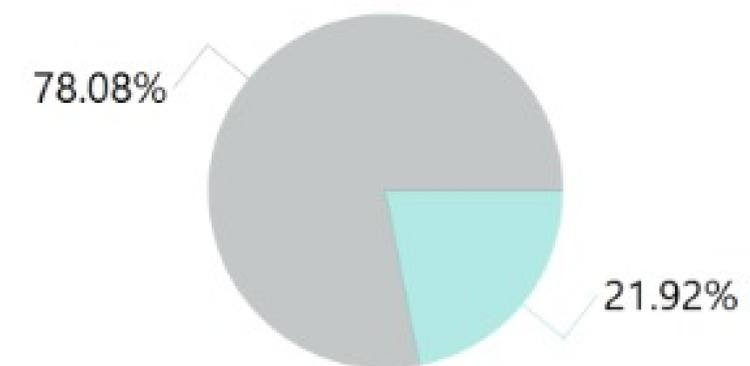
Investment Summary

(Amount in INR)

Asset Class	% of Portfolio	Investment Cost	Market Value
CASH/LIQUID	21.92%	122,538.26	122,538.26
EQUITY	78.08%	424,695.55	436,515.46
PORTFOLIO TOTAL	100.00%	547,233.81	559,053.72

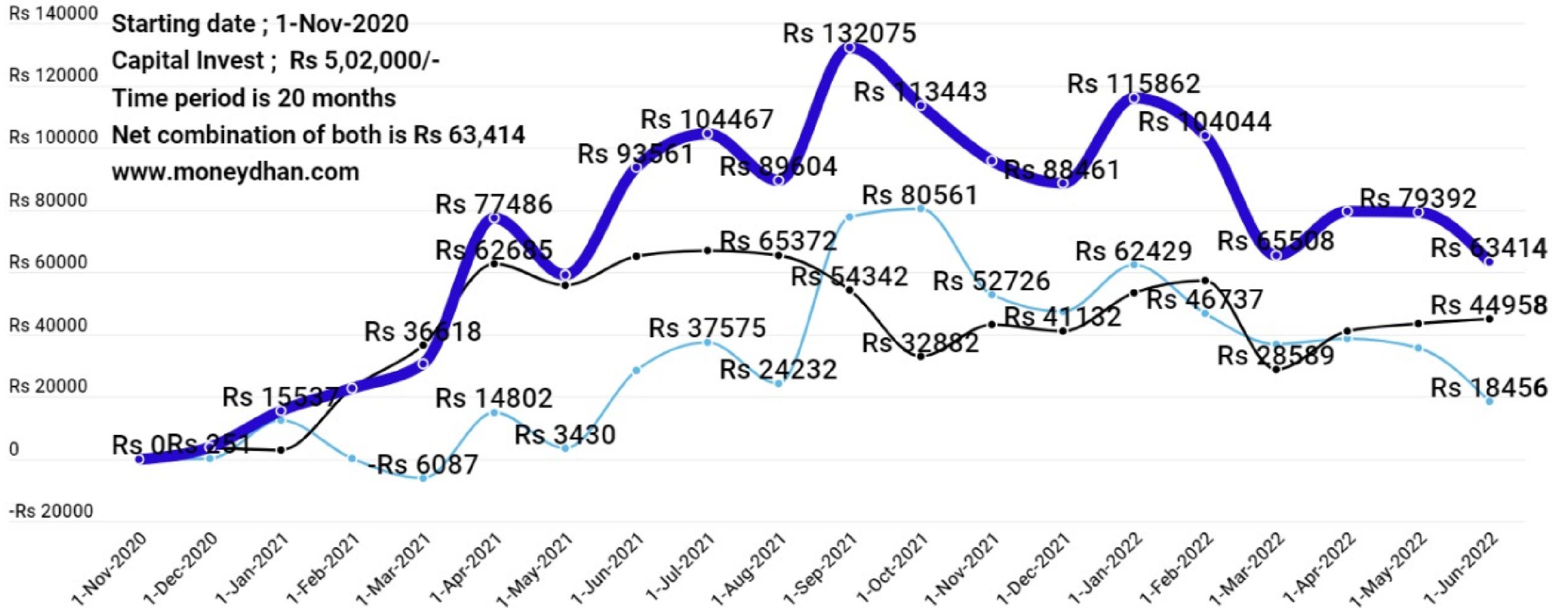
Current Allocation

CASH/LIQUID
EQUITY



Mr. Mohammad ; Net combination of both

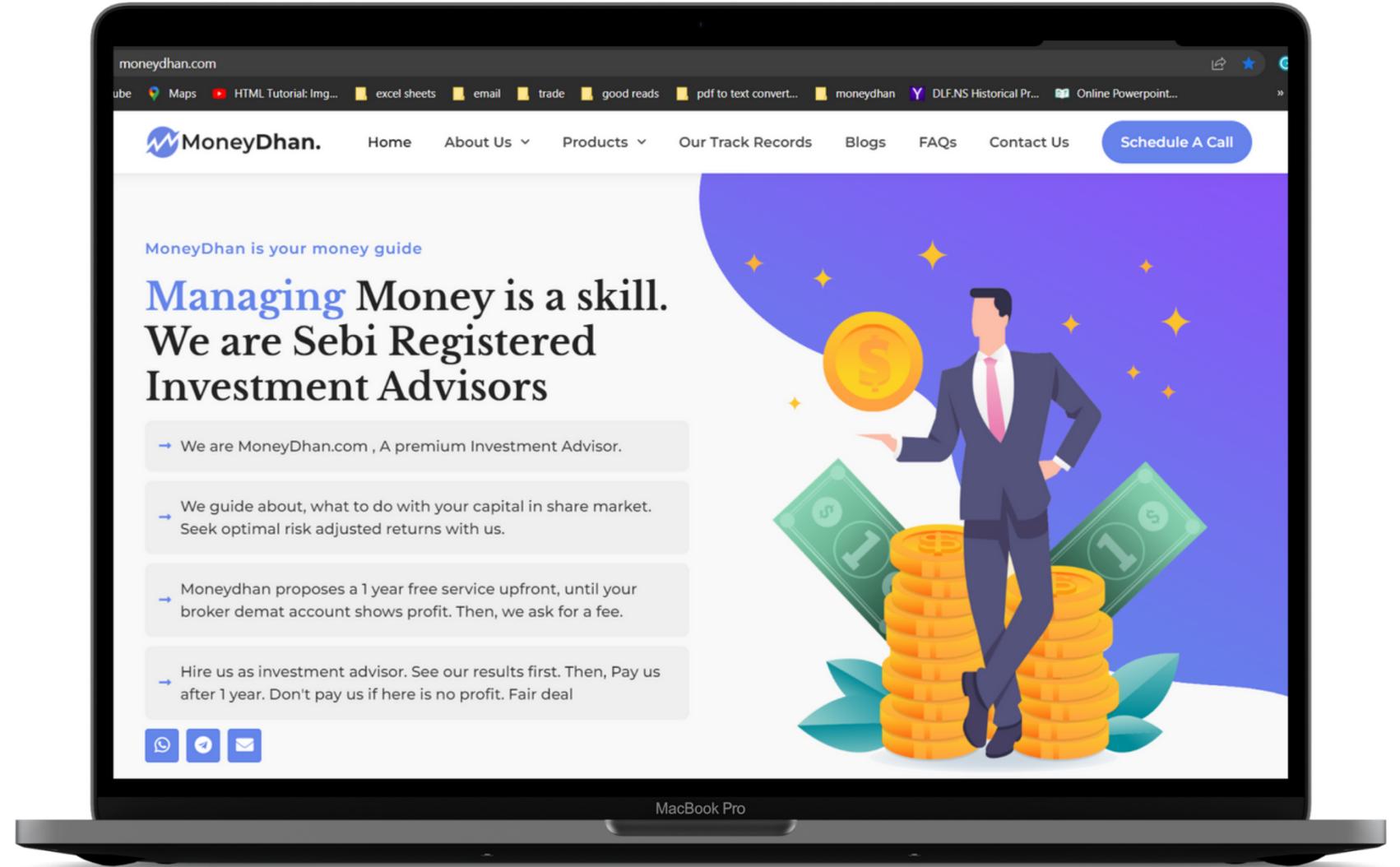
● Demat long term Equity & MF ● Black box alpha ● Net combination





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Or



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