



# Nebula Wealth



Managing Money Intelligently

# Overview

Nebula is a value investment strategy based on a proprietary algorithm which helps us with key questions at the core of any investment decision:

- When to invest? - Timing is the key to any investment decision for both investing and selling.
- Where to invest? - With so many investment avenues it is important to know where to invest.
- How much to invest? - Diversification is the key to minimize losses and maximize gains.

# Understanding how Nebula solves the key challenges

## When to invest?

Based on various factors including but not limited to market conditions, valuations, economic environment, Nebula decides when to invest in an asset class.

## Where to invest?

On the basis of the risk profiling score of an investment opportunity, Nebula invests in multiple asset classes:

- Stock Markets
- Commodity Markets
- Debt Markets

## How much to invest?

Based on the risk and return assessment, Nebula decides how much to invest in which asset class after considering various factors including but not limited to market conditions, valuations, economic environment.

# Our Objectives

- Protecting the downside risk
- Maximizing returns

# Our Performance

# Comparison of returns

The best way to know how well an investment has performed would be by comparing it against the most common and trusted investment avenues:

- Nifty Index
  - Gold
  - S&P 500
  - Fixed Deposits
  - Renowned mutual funds
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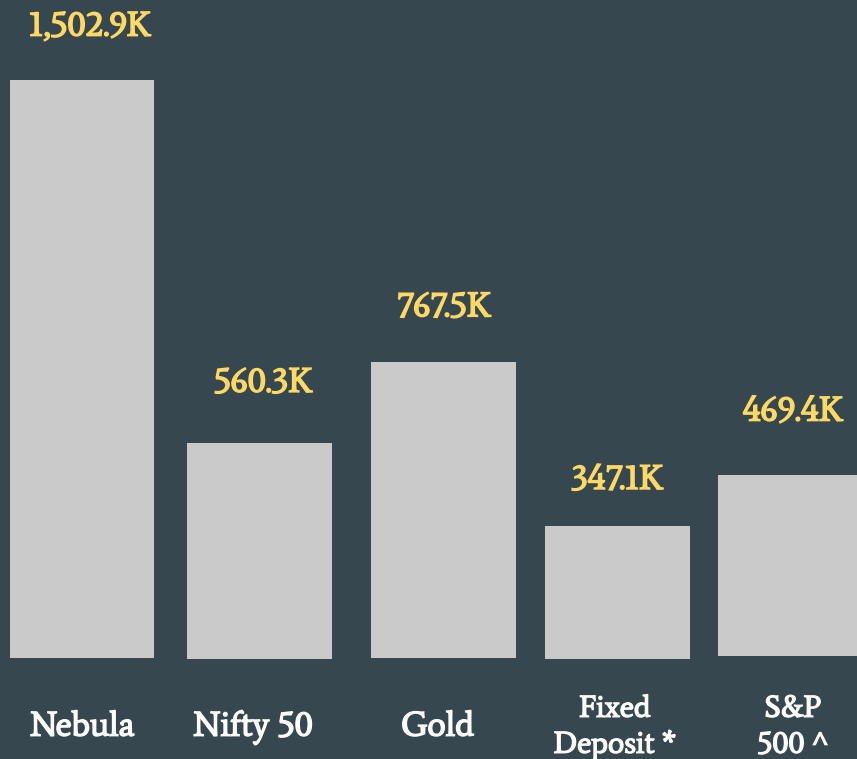
# Trend analysis: Long Term

## Key Takeaways

Nebula has outperformed every major investment asset class delivering a value which:

- Is 95.81% higher than the next best investment: Gold
- Commands CAGR of 18.56%
- Has grown wealth 15 times over 16 years

Value of your investment as on 31st May 2020  
had you invested ₹ 100,000/- on 1st April 2004



\* Fixed Deposits calculated at 8% p.a.

^S&P adjusted for INR-USD Exchange rate

# What did Nebula do right in the Long Term

## Preserved Wealth

The world saw a major economic recession of 2008 where all asset classes eroded investment value, Nebula focused on preserving wealth while steadily growing during that period.

### Implications:

- Nebula had not lost its appreciated value, so could get a greater return during good times
- Nebula allowed access to the investor to withdraw in case of an emergency without incurring a major loss

## Consistent Growth

Nebula did not miss on opportunities to generate returns and consistently invested in the right asset class, thus it grew to compound the returns.

### Implications:

- Nebula grew at a higher rate than most of the asset classes even after diversification
- Nebula grew even in largely stagnant years for most other asset classes



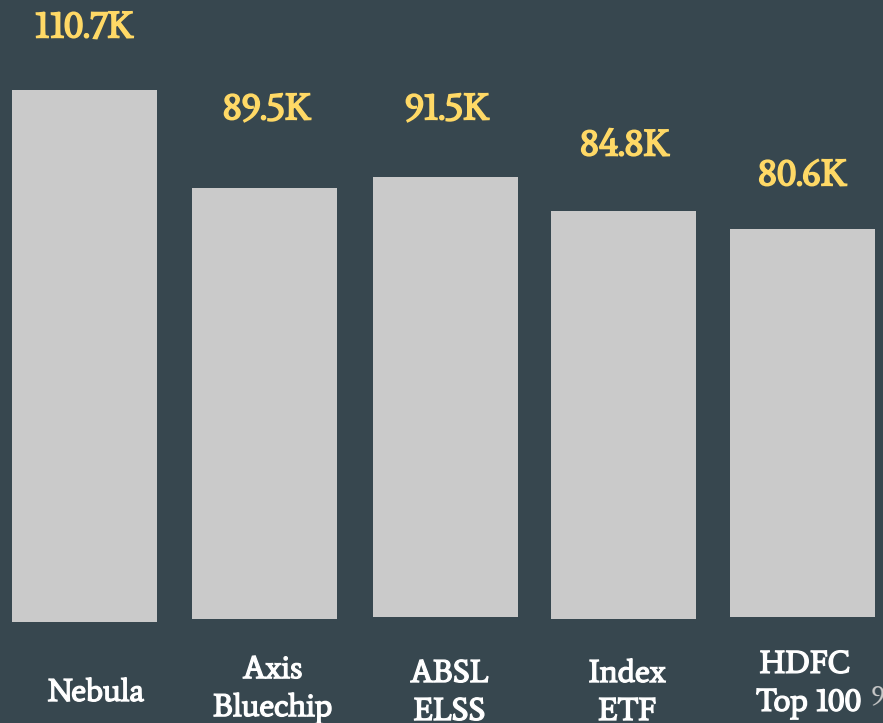
# Trend analysis: Short Term

## Key Takeaways

Covid-19 affected the performance of investments for all the top mutual fund schemes due to the market crash but Nebula sailed through with:

- A positive return of 10.7% (CAGR-22.8%)
- The next best scheme: ABSL ELSS will require another 21% growth to catch up to Nebula

Value of your investment on 30th June 2020 had you invested ₹ 100,000/- on 1st January 2020



# Strength of Nebula : Covid-19 Crash (Jan'20 - Jun'20)

Investment Protected	
Crash Period: Jan - Mar 20	
Nebula	₹ 1,016.47 (+16.47)
Axis Bluechip	₹ 811.23 (-188.77)
ABSL ELSS	₹ 772.50 (-227.50)
Index ETF	₹ 711.89 (-288.11)
HDFC Top 100	₹ 689.27 (-310.73)

Growth Achieved	
Recovery Period: Apr - Jun 20	
Nebula	₹ 1,107.11 (+107.11)
Axis Bluechip	₹ 895.16 (-104.84)
ABSL ELSS	₹ 914.96 (-85.04)
Index ETF	₹ 848.01 (-151.99)
HDFC Top 100	₹ 806.41 (-193.59)

Key Takeaways
On an investment of ₹ 1,000/- made on 1st Jan'20
<ul style="list-style-type: none"><li>Nebula managed to generate a gain in the crash period where rest of the investments eroded value heavily</li><li>Nebula was able to use the preserved investment value to further increase the lead with the rest</li></ul>

# What does Nebula Wealth offer

## Review of your Investment Portfolio

- We will review your investment portfolio, including a performance comparison with Nebula.

## Assessment of your Financial Health

- We will analyze your income, expenditure, liabilities and assets to help you get a better view of your financial health.

## Financial Plan Report

- On the basis of the review and assessment, we will help you set financial goals and prepare a systematic plan.

## Nebula Portfolio

- Our key offering Nebula Portfolio is based on an intelligent value investment strategy implemented on the basis of our proprietary algorithm.

# Contact us



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