



# SMALLCASE INVESTING



By CA Jitendra Saglani  
Immediate Past Chairman  
ICAI – Nagpur Branch





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# UNDERSTANDING SMALL CASES

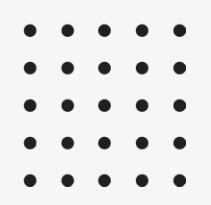


**Portfolio of  
stocks or ETFs**

**centered around  
a particular**



**Theme, idea  
or strategy**



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# KEY BENEFITS

01

Diversification

02

Transparency  
& low risk

03

Ease of  
Management

04

Educational  
Value



# BEST OPTIONS FOR SMALL CASE INVESTING



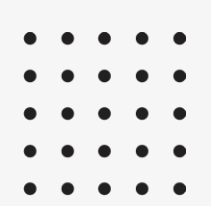
Green Energy



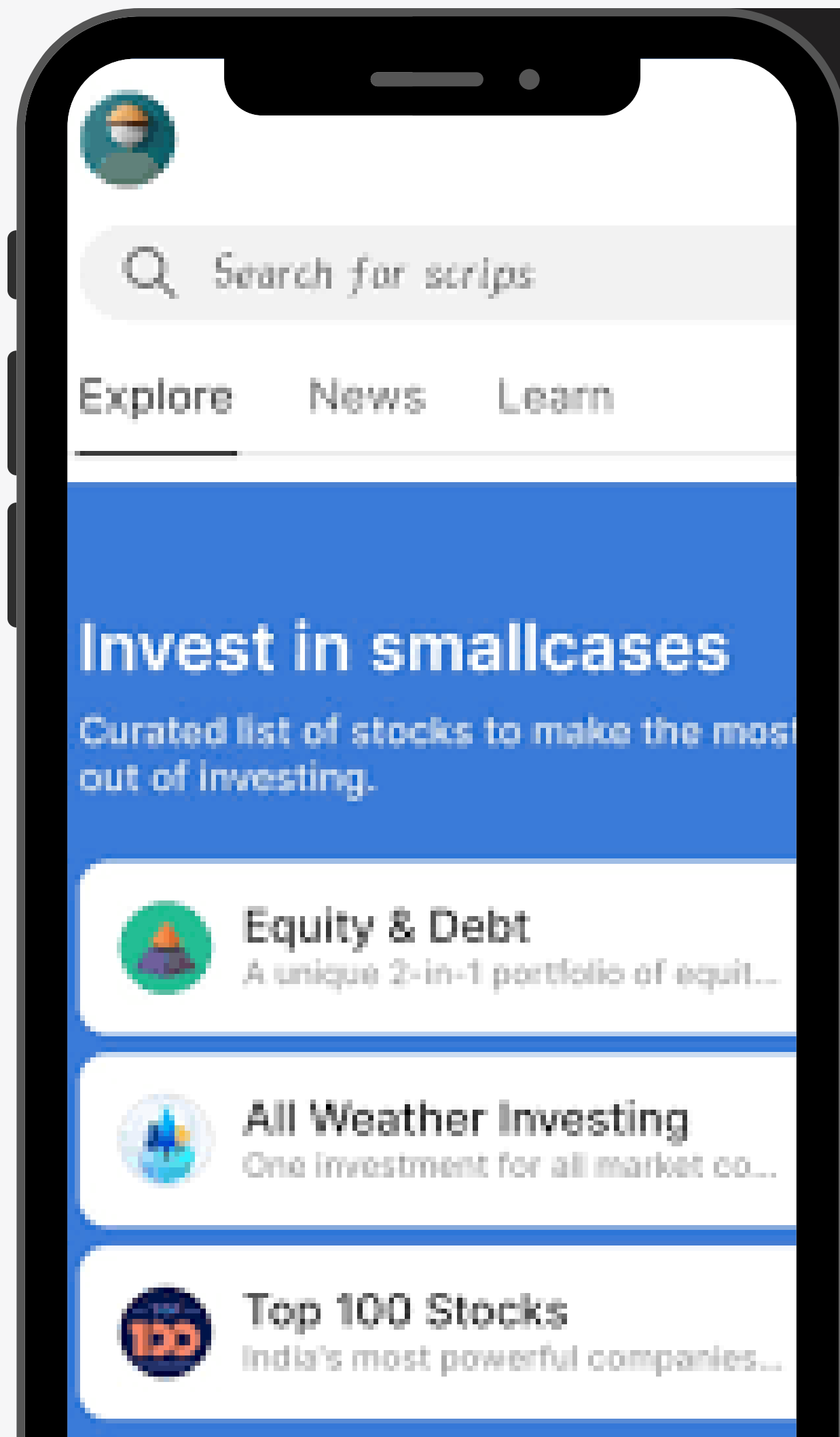
Healthcare



Tech-savvy



# PLATFORMS FOR INVESTING



# CHARGES AND MODES OF PAYMENT

**01**

**Payment mode**

**Lumpsum**

**SIP**

**02**

**Transaction fees**

**₹100 for a curated small case for  
Lumpsum investment**

**₹10 for SIP investments.**



# HOW TO INVEST?



Choose a brokerage or platform that offers small case investing.



Sign up and create an account on the chosen platform. This involves providing personal details, verifying identity, and linking a bank account for transactions.



Explore the available small cases. Platforms offer various themes and strategies. Evaluate based on your investment goals, risk tolerance, and the performance history of each small case.



Once you've selected a small case, navigate to the investment section on the platform. Enter the amount you wish to invest in the chosen small case. Confirm the investment to initiate the transaction.



# LET'S EXPLORE SOME SMALLCASES



Discover Watchlist

For Business

More ▾

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Registration

## Invest in ideas with smallcases

Build your diversified long-term portfolio of  
stocks & ETFs

Login with Broker

Discover smallcases

Supported on India's largest brokers



Don't have a broker account? [Open Broker Account](#)





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# INVESTMENT STRATEGIES



START WITH A SMALL INVESTMENT



DIVERSIFY ACROSS DIFFERENT SMALL CASES



MONITOR THE PERFORMANCE AND MAKE ADJUSTMENTS







# TAX IMPLICATIONS

Securities	12 months holding period	
	STCG	LTCG
Small cases	15%	10% (Exemption upto 1 Lakh)



# FEW EXAMPLES



**Popular** - Viewed over 40K times in the last month



## Equity & Gold

Create wealth with equities, stay protected with Gold. The sweet spot

Min. Amount

₹ 346

5Y CAGR

16.10%



Low Volatility

Source: [smallcase.com](https://smallcase.com)

Click on the link & Explore

# FEW EXAMPLES



## IT Tracker

Free Access

Managed by Windmill Capital

Companies to efficiently track and invest in the IT sector

8Y CAGR

22.91%

High Volatility

Overview

Stocks & Weights

### About the smallcase

India remains one of the world's top sourcing destination with a share of 55%. Indian IT exports touched a peak of US \$670 billion in FY22. The contribution of the IT sector to India's GDP stood at 7.7% in 2020.

- Indian IT & ITeS companies have set up over 1,000 global delivery

[Read more](#) ▾



#### Blog Post

Read more about IT Tracker



#### Methodology

Know how this smallcase was created



#### Factsheet

Download key points of this smallcase

Minimum Investment Amount ⓘ

₹ 86,628 ↻

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# FEW EXAMPLES



## Rising Rural Demand

Free Access

Managed by Windmill Capital

Companies that stand to benefit from increasing rural consumption

8Y CAGR

17.32%

Med. Volatility

Overview

Stocks & Weights

### About the smallcase

With 64% of India's population living in rural areas, the rural sector is one of the major driving forces behind India's economy. Nearly 55% of the population relies on agriculture for their livelihood and it contributes 17% to the nation's GDP. The rural sector has been a key driver of the Indian economy.

[Read more](#) ▾



#### Blog Post

Read more about Rising Rural Demand



#### Methodology

Know how this smallcase was created



#### Factsheet

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Minimum Investment Amount ⓘ

₹ 67,220 ↻

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# FEW EXAMPLES



## Emerging Global Giants - Global Compa...

Managed by Green Portfolio

Invest in the best MNC's following our High-Quality Right Price philosophy (Rec amt 5-10 lakhs)

3Y CAGR

30.26%

High Volatility

Overview

Stocks & Weights

### About the smallcase

Multinational stocks have moats of having a strong global presence, access to global business

learnings, access to cheaper funds, better technology and resources, professional management,

strong products and service offerings.

[Read more](#) ▾



#### Blog Post

Read more about Emerging Global Giants - Global Companies



#### Methodology

Know how this smallcase was created



#### Factsheet

Download key points of this smallcase

Minimum Investment Amount ⓘ

₹ 58,452 ↻

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# FEW EXAMPLES



## Green Energy

Managed by Niveshaay

A portfolio of stocks, which will get benefit from the RE sector development. Rec amount > 4 lac

3Y CAGR

78.34%

High Volatility

### Trending

₹35,000 crores allocated to this industry at Union Budget 23

Minimum Investment Amount ⓘ

₹ 1,24,771 ↻

Get access for ₹2999/3m

[See all plans & benefits](#)

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Add to Watchlist

Overview

Stocks & ETFs

### About the smallcase

This is a portfolio of stocks, which will get benefit from the energy transition. Energy transition refers to the global energy sector's shift from fossil-based systems of energy production and consumption —



#### Blog Post

Read more about Green Energy



#### Methodology

Know how this smallcase was created

[Source: smallcase.com](https://smallcase.com)

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# GOT QUESTIONS?

Reach out.

Prepared by - CA Jitendra Saglani



9405912445



ca.jiten.saglani@gmail.com



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