

WeekendInvesting.com Product Comparison

Feature/Product	Mi20	Mi25	Mi30	Mi40	Mi50
Stock Universe	Large + Mid CNX200	Small Cap All NSE	All cap CNX500	All cap CNX500	Small+ Mid cap All NSE
Exposure per stock	5%	4%	3%	2.5%	2%
Risk (drawdowns)	Low	High	Low	Low	Moderate
Momentum Type**	B	A	A	B	B
LIVE Portfolio Update	Weekly	Weekly	Weekly	Weekly	Weekly
Historical CAGR%*	>15%	>30%	>25%	>20%	>20%
Start Date	Nov 2018	Apr 2017	Feb 2018	Oct 2017	Apr 2016
Annual Flat fee # PF<25L with 8% SG	25000	24000	30000	32000	28000
Annual % Fee # PF>25L. No SG	1%	1%	1%	1%	1%
Annual % Fee # PF>25L with 8% SG	2%	2%	2%	2%	2%

*Conservative back test results over 15 years of historical studies for Mi20/Mi25 and Mi50. Over 5 years for Mi20, Mi30 and Mi40. Brokerages and slippages assumed. Fees and Cap Gain taxes not included. Worst Draw-down range from -25 to -35% in most products. Mi25 in 2018 is experiencing even more than this. All performance reports are available [here](#)

** Type A and B refer to Momentum Type as measured by early entry/exit (A) or late entry/exit (B) in the momentum cycle. Higher churn-lower drawdown in A /Lower churn-higher draw-downs in B. You may choose any of the three fee options. You may switch from one product to the other at any time using your un-used months of credit. You can suspend your account for few months if you so desire. The fees is non refundable in all cases. #GST applicable. Existing clients from other older fee options can move to these new ones if they wish.

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