SCRIP SANCTUARIES

Protection Plans from the Wildlife in this Jungle of Indian Equities

Fundamental Equity Advisory Plans

Jeena Scriptech
ALPHA ADVISORS PVT LTD

Integrating Intellect with Instinct

www.jsalphaa.com

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Here's what we offer as a SEBI Registered Investment Adviser

An Exclusive Direct Equity Advisory Service for Investors

Clients on our Investment Advisory Service get significant added Value as below largely due to:

- One to One regular interaction on their Direct Equity Portfolio
- Advising based on their assessed Risk Profile and Asset Allocation, on Core & Non Core Equity Portfolio Selections with recommended weightages & when to disinvest in part or full
- Advising on tactical strategies with additional weightage & appropriate switches to maximise Portfolio gains
- Full Access to our SS Scrip Sanctuaries Modules

JS Royal

For High Networth Individuals

Annual Fees Rs 5,00,000

(incl 18% GST)

JS Equine

Annual Fees Rs 1,50,000

(incl 18% GST)

Scrip Sanctuaries - Stock Select Series

Protection Plans from the Wildlife in this Jungle of Indian Equities

SS 1 - Scrip

SS 2 - Scrip Sapling

SS 3 - Scrip Sparkle

SS 4 - Scrip Shield

Free Access Web modules

Scrip Scan

Scrip Standpoint

Scrip Watch

Scrip Tease

HERE'S WHY YOU SHOULD JOIN

CREDENTIALS

You don't need Insider Trading when you have Jeena Scriptech Alpha Advisors Pvt Ltd; a prestigious & exclusive Mumbai, India. A **SEBI Registered Investment Advisory, Equity Analysis** and a Fundamental Equity Training & Mentoring Entity led by ***Gaurav A Parikh***, recognized over the past three decades as one of India's pioneering & leading Fundamental Equity Stock Picker, Trainer & Mentor. He has been featured in **Outlook Business for the fifth year in a row including their April 2019 Special Annual Edition**.

Gaurav loves to quote George Patton, ***`If everybody is thinking alike... then somebody isn't thinking'*** & his strong assertion that ***"Wealth of Mind & Wealth of Monies should Move in Tandem"*** comes across passionately when you interact with him or read his popular blogposts on www.gauravblog.com. He has been a pioneering faculty since 1990 with the **BTI Institute Ltd of the Bombay Stock Exchange having co-structured the popular workshop on Fundamental Analysis** & specially conceived a **Workshop on "Equity Portfolio Structuring and Stock Analysis"**. In 2015 **NSE** i**nvited him to be a Mentor in their Equity & Wealth Management Training Programmes**. **He is the ideal *'Go to'* Man for both, for Mentoring Equity Minds & for Serious Wealth Creation through Direct Equity in India**. He can smell an Opportunity or Con even before any Analysis ~ Call it Intuition in a Hurry if you will! This is also reflected in our tag line ***Integrating Intellect with Instinct*****. His fundamental stock selections & full equity portfolios have consistently registered strong annual alpha returns in the past three decades. He's given innumerable Multi-baggers** as well. On the flip side his timely warning and contrarion sell calls going against popular tide at the time on Stocks that went on to strangle, reinforced his credibility to recommend without fear, favour, bias or vested interest.

INVESTMENT PHILOSOPHY & APPROACH TO CREATE & PROTECT ALPHA EQUITY WEALTH

While we do, of course, consider the prevailing influence & impact of the global & Indian macro investing environment & what could follow, especially in the short term ,our defined fundamental approach to identify Stock Selection Ideas to **CREATE & PROTECT ALPHA WEALTH** is a five step evaluation process that could lead from changing macro & sector dynamics or from standalone specific company analysis. It involves

- Assessing Promoter and Management Pedigree for their Mindset, Domain Expertise & Corporate Governance
- Examining the Business Model to sense Ability & Scalability to back Intention
- Reviewing Past, Present and Projected Financials to gauge potential & sustainable higher Returns on Equity & probability of non linear profitability going forward
- Arriving at an Equity Valuation based on Traditional & Contemporary, Relative & Absolute Valuation basis
- Pitching Value vs Share Price to conclude on a mispricing opportunity & any downside risk

We use this philosophy for vetting companies which we add to your **carefully constructed Direct Equity portfolios tailored to align with your risk profile.**

A FEW TESTIMONIALS FROM OUR CLIENTS

- *" Finding a multi-bagger is nice, having someone like Gaurav Parikh guide you on the journey... Priceless!"*
- *"Jeena Scriptech has become my Jaan"*
- *" Mandir may aa kay prasad ne miley, yeh hoh hee nahi sakta!"*
- *"You are a better Wealth Creator than Insider Trading!"*
- *"Ur our Santa sir, as long as you're with us no need of Santa"*

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Corporate Office

Elphinstone Bldg, 1st Floor
Above Starbucks & Croma
Veer Nariman Rd, Horniman Circle
Fort, Mumbai 400 001

Registered Office

Jeena House, Plot No 170
Om Nagar, off Pipeline Road
Andheri (E), Mumbai 400 099

Tel: +91 22 62999117 / 38 / 40
Email: care@jsalphaa.com

CIN: U74999MH2010PTC210730
SEBI Research Analyst Registration: INH000006907
SEBI Investment Adviser Registration: INA000013217

CLIENT REGISTRATION FORM

I/We would like to join your annual **Direct Equity Advisory Service** as under:

Type of Plan

☐ JS Equine Rs 1,50,000

☐ JS Royal Rs 5,00,000

Type of Client ____________________

Individual/Other

Date ____________________ Signature ____________________

Personal Details (Fields marked with * are mandatory)

Mr/Ms/M/s * ____________________

Last Name First Name Middle Name

Qualification ____________________ Occupation ____________________

Company ____________________ Designation ____________________

Address * ____________________

____

City * __________ Pin Code * __________ State * __________ Country * __________

Telephone ____________________ Mobile * ____________________

PAN No * ____________________ Email * ____________________

Self Assessed Risk Profile * ☐ Conservative ☐ Moderate ☐ Aggressive

Payment Details

All payments to be made in favour of **Jeena Scriptech Alpha Advisors Pvt Ltd**

For Direct Bank Transfer NEFT/RTGS:

Current Account No	054405011139
Bank Name	ICICI BANK LTD
IFS Code	ICIC0000544
Branch	Trans Trade Centre, Near SEEPZ, MIDC, Andheri (E), Mumbai - 400093

For Overseas Remittances:

SWIFT Code ICICINBBNRI

For Cheque / DD payment (Payable in Mumbai):

Cheque / DD No: __________ Dated: __________ For Rs : __________

Bank: ____________________ Branch: ____________________

Please send the Registration Form with Cheque/DD/Bank Transfer Intimation to the Corporate Office at Elphinstone Bldg, 1st Floor, Above Starbucks & Croma, Veer Nariman Road, Horniman Circle, Fort, Mumbai 400001

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Direct Equity Portfolio Details (or attach latest Demat Statement)
Name : **Date:**

Sr No	Company	Date of Purchase / Allotment	Holding Quantity	Unit Cost (Rs)	Total Cost (Rs)	Unit Value (Rs)	Total Value (Rs)
	Total						

Additional Information You Would Like To Convey
(Investment Objectives , Needs , Constraints etc)

Signature : **Place:**

Registered Office: Jeena House, Plot No 170, Om Nagar, Off Pipeline Road, Andheri East, Mumbai 400099
Tel: +91 22 62999117/38/40 ~ *Email:* care@jsalphaa.com ~ *Website:* www.jsalphaa.com
CIN: U74999MH2010PTC210730 *SEBI Investment Adviser Registration:* INA000013217

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Risk Profile of :	**Date:**

Investment Mindset

☐ Conservative ☐ Moderate ☐ Aggressive

Dependants

☐ Spouse ☐ Children ☐ Others

Percentage of Investment Income used for Normal Expenditure

☐ None ☐ Upto 25% ☐ 26% - 50% ☐ 51% - 75% ☐ Over 75%

Annual Investible Surplus currently generated after meeting all Expenses

☐ Less than Rs 1,00,000 ☐ Rs 1,00,001 – Rs 5,00,000

☐ Rs 5,00,001 – Rs 10,00,000 ☐ Over Rs 10,00,000

Current Portfolio Value

Indian Equity: Rs ____________________

Fresh Funds available for Equity: Rs ____________________

All Other Assets: Rs ____________________

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Investor Profile Questionnaire and Risk Assessment

The first step in the Asset Management Process is to determine your investor profile. This profile will help define important factors such as your *investment objectives*, *time horizon*, and your *attitude toward investing*.
This profile will help build the base of information needed for you to progress to the next step in the asset management process - the development of an appropriate asset allocation policy.
To complete this profile, answer each question by checking the button that best matches your personal situation. The point value of each answer is shown at the right in parenthesis.

Investment Objectives

1. Which choice best describes your investment objectives?

- ○ Preserving principal and earning a moderate amount of current income (1)
- ○ Generating a high amount of current income (2)
- ○ Generating some current income and growing my assets (3)
- ○ Growing my assets substantially (4)

2. Five years from now, what do you expect your standard of living to be?

- ○ The same as it is now (1)
- ○ Somewhat better than it is now (2)
- ○ Substantially better than it is now (3)

3. Ten years from now, what do you expect your portfolio value to be?

- ○ The same as or a little more than it is today (1)
- ○ Moderately greater than it is today (2)
- ○ Substantially greater than it is today (3)

4. What is your current income requirement (interest plus dividends) from this portfolio?

- ○ More than 4% (1)
- ○ 2% - 4% (2)
- ○ 0% - 2% (3)

5. What do you want to do with the income generated by your portfolio?

- ○ Receive all income (1)
- ○ Receive some and reinvest some (2)
- ○ Reinvest all income (3)

Risk Tolerance

1. You just received a substantial sum of money. How would you invest it?

- In something that offers moderate current income and is very safe (1)
- In something that offers high current income with moderate risk (2)
- In something that offers high total return (current income plus capital appreciation) with moderately high risk (3)
- In something that offers substantial capital appreciation even though it is high risk (4)

2. Which of the following statements best describes your reaction if the value of your portfolio suddenly declined 15%?

- Very concerned - I cannot accept fluctuations in the value of my portfolio (1)
- Would not bother me if the amount of income I received is unaffected (2)
- Be concerned about a temporary decline even though I invest for long-term growth (3)
- Accept temporary changes due to market fluctuation (4)

3. Which of the following investments would you feel most comfortable owning?

- Treasury Bonds (1)
- Other Bonds (2)
- Stocks of older, established companies (3)
- Stocks of newer, growing companies (4)

4. How optimistic are you about the long-term prospects for the economy?

- Pessimistic (1)
- Unsure (2)
- Somewhat optimistic (3)
- Very optimistic (4)

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Time Horizon

1. What is the time frame for you to achieve your financial goals?
- 0 - 5 years (1)
- 5 - 10 years (2)
- 10 - 15 years (5)
- 15 years or longer (10)

2. What is your primary financial goal?
- Wealth preservation (1)
- Education funding (2)
- Retirement planning (5)
- Long-term wealth accumulation (10)

3. What is your age?
- Over 55 (1)
- 45 - 55 (2)
- 30 - 45 (5)
- Under 30 (10)

Investor's Score	Actual	Maximum
Investment Objectives Total		16
Risk Tolerance Total		16
Time Horizon Total		30
Total Score		62