

# THE KEY TO MONEY IS TO STAY INVESTED.

- Suze Orman

Invest

Grow

Multiply



UpperCrust Wealth  
FAMILY WEALTH OFFICE

[www.uppercrustwealth.com](http://www.uppercrustwealth.com)

|                     | INVEST                                    | GROW  | MULTIPLY   |
|---------------------|---|---|--|
| Portfolio Name      | UPPERCRUST WEALTH FUND<br>(MULTICAP FUND) | UPPERCRUST GROWTH FUND<br>(MULTI-ASSET FUND)            | UPPERCRUST PROSPERITY FUND<br>(MULTIPLY WEALTH @ 10X FUND) |
| Investment Style    | Core- Satellite Active Strategy           | Rule Based Active – Passive Strategy                    | Highly Concentrated Bespoke Portfolio                      |
| Benchmark           | S&PBSE500TRI                              | Nifty Multi Asset Equity:<br>Arbitrage (50:40:10) Index | Nifty Small Midcap 400TRI                                  |
| Suitable Investor   | Aggressive                                | Moderate Plus   | Very Aggressive  |
| Minimum Ticket Size | ₹ 2Cr.   AED 1M   US\$ 250k               | ₹ 1Cr.   AED 0.5M   US\$ 125k                           | ₹ 5Cr.   AED 2M   US\$ 500k                                |
| Time Horizon        | 5+ years                                  | 5+ years  | 5–8 years  |
| Exit Load           | NIL                                       |   |  |
| Fees                | 2.75% p.a.                                |   |  |
| Banking Partner     | IndusInd Bank                             |   |  |
| Custodian           | Orbis Financial Corporation Limited       |   |  |



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