Health First

The Nakula Portfolio - Investing in Health, Investing in the Future

Healthcare-Themed Equity Portfolio of Leading Pharmaceutical Companies

VOLATILITY
Low

TYPE	CONSTITUENTS	ASSET CLASS
Thematic	Stocks	Multi Cap
LAUNCH DATE	**BENCHMARK**	**REBALANCE**
Apr 01, 2025	NIFTY 500	Quarterly
INVESTMENT HORIZON	**RESEARCH ANALYST**	
Long Term	Streetgains (RA)	

Investment Objective

The Health First Portfolio focuses on building long-term wealth by investing in leading healthcare and pharmaceutical companies positioned to benefit from growing healthcare needs and global industry opportunities.

Portfolio Rationale

Designed to capture opportunities in India's growing healthcare ecosystem through investments in quality pharmaceutical and healthcare businesses with strong fundamentals and sustainable growth prospects.

01 - HIGHLIGHT
A concentrated portfolio hand-picked from the Nifty 500 universe, focusing on fundamentally strong companies.

02 - HIGHLIGHT
Designed for long-term growth with risk-managed exposure, leveraging fundamental analysis to capture high-quality opportunities.

03 - HIGHLIGHT
Dynamic weight allocation ensures balanced exposure across all holdings.

04 - HIGHLIGHT
Quarterly rebalancing allows the portfolio to adapt to changing market conditions and maintain optimal stock selection.

PHILOSOPHY ANCHOR

Nakula — vitality, skill and disciplined care

Nakula, prized among the Pandavas for vigour, skill and care, lends this portfolio its temperament: tend to what sustains you with discipline and foresight. Health First applies the same care to capital — favouring resilient, well-run businesses in the economy of health. The market tunes the portfolio; we tune the investor. Wisdom is used here as a behavioural anchor, never as worship.

Invest with philosophy. Grow with discipline.

Volatility & Risk Profile

Each Streetfolio is placed in one of three volatility buckets — Low, Medium or High — by comparing its daily value fluctuation against the Nifty 100 Index.The Health First Portfolio is categorised **Low Volatility**: investment values can move sharply and suddenly. It is suitable only for investors with a long horizon and the temperament to withstand interim drawdowns.

Low Moderate High

Holdings & Allocation Framework

SECTOR UNIVERSE

Healthcare

CONSTITUENT CATEGORIES

- Large Cap (Rank ≤ 100 by m-cap)
- Mid Cap (Rank 101–250)
- Small Cap (Rank > 250)
- Multicap ETFs
- Gold / precious-metal ETFs

Specific constituents, conviction weights and segment-wise holdings distribution are disclosed to active subscribers within the Streetfolio platform and are reviewed at each rebalance. Weights are assigned by conviction; where unspecified, equal weights are assumed for calculation.

Rebalance Schedule

Rebalance Frequency	Last Rebalance Date	Next Rebalance Date
Quarterly	April 01, 2026	July 01, 2026

Rebalancing is the periodic review and update of constituents so the portfolio continues to reflect its underlying theme and strategy.

Subscription Plans

3 MONTHS	12 MONTHS
₹2,400	₹6,000
	Best value • ₹500/mo

*Inclusive of all applicable taxes. Final payable amount is confirmed at checkout on folio.streetgains.in.

How to Subscribe

1. Add email address
2. Select a plan
3. Add billing information
4. Complete payment and subscribe

How to Invest

1. After choosing a portfolio, click "Invest Now"
2. Select Investment Type
3. Confirm your investment amount
4. Review the order details and place your order

RESEARCH ENTITY	SEBI RESEARCH ANALYST REG. NO.	RESEARCH ANALYST	PLATFORM
Streetgains Technologies Pvt. Ltd.	INH000017082	Streetgains (RA)	folio.streetgains.in

Definitions & Disclosures

PERFORMANCE DISCLOSURE — IMPORTANT

In line with SEBI's Performance Validation Agency (PaRVA) framework and the interim circular of October 2023, past performance figures (including CAGR and returns) are **not displayed publicly**. Live performance may be shared on a one-to-one basis upon a client's request, duly certified by a CA/CMA. Such figures are **not validated by a regulatorily-recognised performance validation agency**, as the framework is yet to be operationalised. Charts and performance numbers never include backtested data; only live data is considered.

CAGR

CAGR (Compounded Annual Growth Rate) expresses the single annual rate that would produce the same terminal value as a portfolio's actual year-on-year returns. It indicates the annualised return generated by a Streetfolio from its date of launch. For Streetfolios live for less than one year, absolute returns for the applicable period are used. Only live data is considered; CAGR numbers exclude backtested data. (The CAGR calculation methodology was updated on 25 April 2022 across all Streetfolio platforms.)

Volatility Label

Daily changes in stock/ETF prices cause fluctuations in a portfolio's value. To help investors gauge the extent of fluctuation, every Streetfolio is categorised — High, Medium or Low Volatility — by comparing its volatility against the Nifty 100 Index. High-volatility Streetfolios can move suddenly and sharply; low-volatility Streetfolios are expected to fluctuate less.

Investment Horizon

For each portfolio the manager provides a recommended holding duration to realise the best outcomes:

- **Short Term** — recommended duration of less than 1 year
- **Medium Term** — 1 to 3 years
- **Long Term** — greater than 3 years

Asset Class

The constituent universe from which a portfolio's holdings are selected is its Asset Class — e.g. Equity Large Cap (top 100 by m-cap on the NSE), Equity Mid Cap (rank 101–250), Equity Small Cap (rank > 250), Multi Cap, Debt, Commodity, or Multi-Asset (a mix of equity, gold, silver, commodity, debt or REIT/INVIT constituents). The HNI Wealth Builder is a Multi-Asset portfolio.

Categorisation & Holdings Distribution

All NSE-listed stocks are ranked in decreasing order of market capitalisation: rank ≤ 100 is Large Cap, 101–250 is Mid Cap, and > 250 is Small Cap. Each constituent is grouped into a segment (Large Cap, Mid Cap, Small Cap, Multicap ETFs, Gold); a segment's weight is the sum of the weights of its constituents. Where the manager prescribes no weights, equal weights are assumed.

Determination of Comparable Index

The comparable index is determined from segment weights — e.g. Large Cap > 50% → Equity Large Cap; Mid Cap > 50% → Equity Midcap; Small Cap > 50% → Equity Smallcap; blended thresholds map to Equity Large & Midcap or Equity Mid & Smallcap; failing all, Equity Multi-Cap. Where the non-equity (gold/silver/commodity/debt/REIT-INVIT) weight is dominant, the portfolio is benchmarked against the relevant equity reference for comparison purposes.

Comparison of Live Performance

The platform lets investors compare a Streetfolio's live performance against Bank FD returns (RBI 1–3 year deposit rates), Inflation (IMF average consumer-price change), the Equity large-cap segment (Nifty 100) and the determined comparable index. This comparison communicates factual, verifiable returns on behalf of the Streetfolio creator and is not an advertisement, promotion or claim. Performance is not validated by a regulatorily-recognised validation agency, as that framework is yet to be operationalised.

General Investment Disclosure

All information (including charts, ratios and performance) is provided only for Streetfolios created by SEBI-registered entities authorised to do so. The platform does not, on its own, make any claim of performance or returns; it merely provides tools for performance calculation based on a defined returns methodology. All research and recommendation services are provided by the respective SEBI-registered entity. Investment in the securities market is subject to market risks — read all related documents carefully before investing, and consider consulting your financial advisor before any investment decision.

Risk Disclosure

Investing in securities involves various risks that may impact investments, including changes in: (1) market volatility; (2) general market conditions; (3) trading volumes, liquidity and settlement periods; (4) interest rates; and (5) the rate of inflation, alongside domestic and global political, economic and financial developments.

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