

A NOTE FROM TEAM INVEST SEARCH

As we step into a new financial year, March gave us the opportunity to pause, reflect, and realign.

With changing market phases and evolving narratives, this month reinforced an important idea, clarity matters more than prediction.

As we begin FY 2026–27, our focus remains on helping you stay disciplined, aligned, and confident in your long-term journey.

Warm regards,
Team Invest Search

**#AdvisorLens:
Navigating the Current Market Phase**

Markets are currently going through a phase of uncertainty and shifting sentiment.

- What's happening right now:**
- Markets are experiencing phases of volatility
 - Global developments are influencing investor sentiment
 - Leadership across sectors may be shifting



- What investors often do:**
- Pause or stop SIPs
 - Wait for "clarity" before investing
 - Shift portfolios based on recent performance

- A more structured approach:**
- Continue SIPs consistently
 - Use volatility to invest gradually
 - Stay aligned with your asset allocation
 - Review goals, not daily market movements



*Simple perspective:
Short-term uncertainty is part of the journey.
Long-term wealth is built by staying through it.*

**#InvestorEducation:
Volatility & Long-Term Wealth**

Volatility can feel uncomfortable but it plays an important role in investing.

A simple truth: *If markets only moved upward smoothly, there would be fewer opportunities to build wealth effectively.*



- Understanding volatility:**
- It creates opportunities to invest at different levels
 - It reflects price discovery, not permanent loss
 - It separates emotional decisions from disciplined ones

*Investor insight:
Volatility is not a problem to avoid, it's a condition to accept and work with.*

**#PortfolioCheck:
A 1-Minute Health Check**

Take a moment to reflect on your portfolio:

- INVESTMENT DISCIPLINE**
 - Are you investing regularly (SIP/STP)?
 - Have you stayed consistent despite market noise?
- ASSET ALLOCATION**
 - Do you know your equity-debt mix?
 - Is it aligned with your goals and risk profile?
- BEHAVIOUR CHECK**
 - Are you following a structured plan?
 - Have you avoided impulsive decisions recently?
- GOAL ALIGNMENT**
 - Are your investments linked to specific goals?
 - Have you reviewed them in the last 6–12 months?

VERDICT: *If 2 or more answers are "No," it may be time for a portfolio review.*

**#MilestoneMoment:
Expanding Our Expertise (SIF Certification)**

We're proud to share that our founder, Himanshu Dani has cleared the Specialised Investment Funds certification.



What are SIFs?

- A SEBI-regulated category positioned between Mutual Funds and AIFs
- Designed for advanced investment strategies

Key features:

- Long-short strategies, sector rotation, tactical allocation
- Ability to short markets (up to 25%)
- Mutual fund-style taxation

Who is it for?

- HNIs and experienced investors
- Those seeking higher returns with higher risk tolerance

This milestone strengthens our ability to guide clients across a wider spectrum of investment solutions.

#TeamMoments:



Celebrating Sejal

March also brought a moment of celebration as we marked Sejal's birthday together.

With laughter, cake, and shared moments, it was a reminder that while we focus on financial goals, it's equally important to celebrate the people behind the journey.

**#ClosingNote:
Starting the Financial Year with Clarity**

A new financial year isn't about predicting markets, it's about preparing your portfolio.

**Markets will move. Narratives will change.
But disciplined investors focus on alignment, not noise.**



- What you can do this month:**
- Review your current investments
 - Check your asset allocation
 - Align investments with your goals
 - ✓ Continue or increase SIPs where appropriate

Quote of the Month

"Your future is built on the discipline of today, not the predictions of tomorrow."

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Operations Query support :
8355816883 / 9324971305 / 7208970616

✉ Help@investsearch-india.com

📱 @investsearch1

www.investsearchonline.com