

# OUR PERFORMANCE

YEARLY RETURNS (%)	2020 1ST JAN- 31ST DEC	2021 1STJAN- 31ST DEC	2022 1STJAN- 31ST DEC	2023 1STJAN- 31ST DEC	2024 1ST JAN – 30 <sup>TH</sup> JUNE
NIFTY 50	14.76	23.79	2.72	18.88	10.48
NIFTY 100	14.75	24.62	2.15	19.40	14.09
MOAT PMS	22.24	31.32	4.95	32.45	21.67
Uppercrust Wealth Fund (MUCWF)	NIL	NIL	-12.50	40.41	42.07
Total Average Returns	22.24	31.32	-3.78	36.43	31.87

## 2020 - TILL DATE RETURNS (%)

1ST JAN 2020 – 30TH JUNE 2024

NIFTY 50	01ST JAN 2020	97.09
NIFTY 100	01ST JAN 2020	103.65
MOAT PMS	01ST JAN 2020	167.93
Uppercrust Wealth Fund	01ST JAN 2022	74.57

Disclaimer: Moat Financial Services Pvt Ltd does not guarantee the future performance to be same as the past performance  
Moat Financial Service Pvt Ltd the performance related information provided therein is not verified by SEBI

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MONTHLY RETURNS (%)	JAN	FEB	MAR	APR	MAY	2024
	2024	2024	2024	2024	2024	June
	NIFTY 50	-0.26	1.18	1.56	1.24	-0.32
NIFTY 100	0.61	2.15	1.75	2.25	0.34	6.33
MOAT PMS	2.03	-0.68	-0.23	4.53	7.32	7.90
Uppercrust Wealth Fund	7.42	1.30	1.48	11.25	8.24	7.41
Total Average Returns	4.73	0.31	0.62	7.89	7.78	7.65

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