

Meta

Microsoft

amazon



Google

DOWJONES

TESLA



STANDARD  
& POOR'S 500

NETFLIX



VISA



Coca-Cola

GOLD MINING  
CORPORATIONS



Disney



JPMorganChase

Nasdaq

**INVESTMENT OPPORTUNITY IN FOREIGN EQUITY**

## ❖ How can I invest in U.S. Market?

- **Option 1 - Investing through direct stocks & stock portfolios**
- **Option 2 - Investing through Exchange Traded Funds (ETFs)**



**How can I  
invest in U.S.  
Market?**





**Option 1:  
Investing through  
direct stocks &  
stock portfolios**



# How can I invest in U.S. Stocks?

- ✓ Investing through structured customised stock portfolios.
- ✓ **Portfolio Name: FAANG+MT**
- ✓ Theme: Investment in global technological leaders in innovation.

No.	Name	Holding Percentage
1	Facebook	10.00%
2	Amazon.com	20.00%
3	Apple	20.00%
4	Netflix	5.00%
5	Alphabet Inc. - Class C Shares	20.00%
6	Microsoft Corporation	20.00%
7	Tesla	5.00%

Our partner in foreign equity investment : Vested Finance Inc. – U.S.A.

# How can I invest in U.S. Stocks?

No.	Stocks	Weighted Returns as on 01-07-2024 (\$ terms) CAGR					
		1 M	3 M	6 M	1 Yr	3 Yr	5 Yr
1	Facebook	0.57%	0.27%	4.57%	7.64%	1.25%	2.12%
2	Amazon.com	2.12%	1.79%	6.31%	10.29%	0.95%	3.09%
3	Apple	2.34%	5.50%	3.35%	2.52%	3.29%	6.78%
4	Netflix	0.31%	0.48%	2.19%	2.63%	0.40%	0.62%
5	Alphabet Inc. - Class C Shares	1.15%	3.58%	6.44%	10.61%	2.69%	5.49%
6	Microsoft Corporation	2.09%	1.51%	4.63%	7.03%	3.78%	5.50%
7	Tesla	0.95%	0.99%	-0.78%	-1.25%	-0.12%	3.46%
	FAANG+MT	9.54%	14.12%	26.71%	39.47%	12.24%	27.05%
	Nasdaq 100 (USD)	6.51%	8.30%	19.76%	30.27%	10.81%	20.59%

Source: <https://app.vested.co.in/>

Our partner in foreign equity investment : Vested Finance Inc. – U.S.A.

# How can I invest in U.S. Stocks?

- ✓ Investing through structured customised stock portfolios.
- ✓ **Portfolio Name: FUTURETECH**
- ✓ Theme: Investment in companies engaged in disruptive technological themes such as AI, IoT, Cloud, 5G, Big Data, Robotics, Analytics, Cybersecurity, etc.
- ✓ The ideas are for futuristic innovations such as Battery Electric Vehicles (Evs), Industry 4.0, Autonomous Cars, Virtual Reality, Smart Wearables, etc.

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# How can I invest in U.S. Stocks?

No.	Stocks	Weighted Returns as on 01-07-2024 (\$ terms) CAGR					
		1 M	3 M	6 M	1 Yr	3 Yr	5 Yr
1	Goog Alphabet Inc Class C	0.40%	1.25%	2.25%	3.71%	0.94%	1.92%
2	Amazon.com	0.74%	0.63%	2.21%	3.60%	0.33%	1.08%
3	Microsoft Corporation	0.73%	0.53%	1.62%	2.46%	1.32%	1.92%
4	Meta Platforms	0.23%	0.11%	1.83%	3.06%	0.50%	0.85%
5	Apple	0.88%	2.06%	1.26%	0.95%	1.23%	2.54%
6	iRobot Corporation	-0.11%	0.11%	-1.93%	-2.01%	-1.35%	-0.93%
7	Take-Two Interactive Software	-0.14%	0.07%	-0.08%	0.11%	-0.12%	0.15%
8	Adobe Systems	0.69%	0.29%	-0.09%	0.39%	-0.04%	0.33%
9	Interdigital	0.04%	0.49%	0.24%	0.53%	0.42%	0.32%
10	Micron Technology	0.07%	0.15%	1.49%	2.65%	0.45%	0.67%
11	KYNDRYL HOLDINGS	0.02%	0.60%	0.83%	2.55%	#N/A	#N/A
12	Box	-0.12%	-0.19%	0.06%	-0.25%	-0.01%	0.21%
13	Qorvo	0.51%	0.08%	0.30%	0.20%	-0.09%	0.19%

**Our partner in foreign equity investment : Vested Finance Inc. – U.S.A.**

# How can I invest in U.S. Stocks?

No.	Stocks	Weighted Returns as on 01-07-2024 (\$ terms) CAGR					
		1 M	3 M	6 M	1 Yr	3 Yr	5 Yr
14	Fabrinet	0.04%	0.72%	0.71%	2.21%	0.91%	0.90%
15	Diodes	-0.16%	-0.01%	-0.30%	-0.62%	-0.10%	0.35%
16	YELP	-0.04%	-0.22%	-0.55%	-0.02%	-0.10%	0.03%
17	Netflix	0.16%	0.24%	1.09%	1.31%	0.20%	0.31%
18	Cirrus Logic	0.28%	0.96%	1.40%	1.42%	0.37%	0.58%
19	Intel Corporation	0.05%	-0.77%	-0.89%	-0.21%	-0.45%	-0.21%
20	Qualcomm Incorporation	-0.07%	0.41%	1.07%	1.66%	0.31%	0.52%
21	Cisco Systems	0.05%	-0.13%	-0.15%	-0.21%	-0.10%	-0.07%
22	F5	0.06%	-0.25%	-0.07%	0.43%	-0.08%	0.07%
23	Lumentum Holding	0.41%	0.17%	-0.03%	-0.26%	-0.38%	-0.03%
24	Accenture	0.18%	-0.27%	-0.32%	-0.07%	0.01%	0.25%
25	International Business Machines Corp	0.15%	-0.19%	0.21%	0.77%	0.19%	0.14%
26	Lam Research Corporation	0.33%	0.20%	1.04%	1.57%	0.47%	1.02%

**Our partner in foreign equity investment : Vested Finance Inc. – U.S.A.**

# How can I invest in U.S. Stocks?

No.	Stocks	Weighted Returns as on 01-07-2024 (\$ terms) CAGR					
		1 M	3 M	6 M	1 Yr	3 Yr	5 Yr
27	Autodesk	0.42%	-0.13%	0.13%	0.52%	-0.14%	0.19%
28	Salesforce.com	0.21%	-0.38%	0.00%	0.53%	0.04%	0.27%
29	Intuit	0.37%	0.04%	0.19%	1.10%	0.25%	0.49%
30	Universal Display Corporation	0.44%	0.63%	0.30%	1.12%	-0.04%	0.04%
31	Adeia	-0.12%	0.09%	-0.27%	0.06%	0.61%	0.39%
32	Xperi	-0.11%	-0.79%	-0.73%	-1.00%	#N/A	#N/A
	<b>FUTURETECH</b>	<b>6.56%</b>	<b>6.51%</b>	<b>12.83%</b>	<b>28.26%</b>	<b>5.57%</b>	<b>14.50%</b>
	<b>Nasdaq 100 (USD)</b>	<b>6.51%</b>	<b>8.30%</b>	<b>19.76%</b>	<b>30.27%</b>	<b>10.81%</b>	<b>20.59%</b>

Source: <https://app.vested.co.in/>

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# How can I invest in U.S. Stocks?

- ✓ Investing through structured customised stock portfolios.
- ✓ **Portfolio Name: HEALTHMAGIC**
- ✓ Theme: Healthcare portfolio comprises of companies engaged in research for the much awaited Covid – 19 vaccine, along with several other healthcare companies. They are pioneers in medical innovation and therapies developed across the world in the pharmaceutical and biotechnology industry.
- ✓ There are 17 selected companies (having equal weights).

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# How can I invest in U.S. Stocks?

No.	Stocks	Weighted Returns as on 01-07-2024 (\$ terms) CAGR					
		1 M	3 M	6 M	1 Yr	3 Yr	5 Yr
1	Pfizer	-0.22%	0.11%	-0.30%	-1.35%	-0.63%	-0.44%
2	Moderna	-1.27%	0.58%	0.18%	-0.28%	-1.23%	3.00%
3	AstraZeneca	-0.08%	0.93%	0.82%	1.14%	0.52%	0.80%
4	Johnson & Johnson	-0.05%	-0.42%	-0.50%	-0.61%	-0.24%	0.06%
5	Novavax	-1.77%	10.22%	9.00%	4.26%	-3.59%	1.03%
6	GlaxoSmithKline	-0.36%	-0.56%	0.14%	0.51%	-0.12%	-0.08%
7	Sanofi S.A.	0.04%	0.16%	-0.05%	-0.44%	-0.11%	0.15%
8	Mckesson Corporation	0.14%	0.55%	1.40%	2.31%	2.64%	2.02%
9	Regeneron Pharmaceuticals	0.40%	0.53%	0.99%	2.78%	1.32%	1.60%
10	Amgen	0.07%	0.58%	0.27%	2.25%	0.47%	0.63%
11	Edwards Life Sciences Corp	0.16%	-0.25%	1.14%	-0.08%	-0.29%	0.46%
12	Abott Laboratories	0.02%	-0.47%	-0.36%	-0.22%	-0.24%	0.24%

Source: <https://app.vested.co.in/>

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# How can I invest in U.S. Stocks?

No.	Stocks	Weighted Returns as on 18-06-2024 (\$ terms) CAGR					
		1 M	3 M	6 M	1 Yr	3 Yr	5 Yr
13	Zoetis	0.01%	0.20%	-0.72%	0.08%	-0.18%	0.51%
14	West Pharmaceuticals	-0.07%	-1.06%	-0.41%	-0.84%	-0.22%	1.24%
15	Eli Lilly and Company	0.59%	1.19%	3.20%	5.77%	3.42%	3.06%
16	Intuitive Surgical	0.47%	0.62%	1.87%	1.75%	0.72%	1.17%
17	Thermo Fisher Scientific	-0.29%	-0.36%	-0.03%	0.26%	0.12%	0.74%
	HEALTHMAGIC	-2.22%	12.53%	16.66%	17.30%	2.37%	16.20%
	S&P 500 Index (USD)	3.63%	4.41%	15.44%	22.88%	8.22%	13.06%

Source: <https://app.vested.co.in/>

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# How can I invest in U.S. Stocks?

- ✓ Investing through structured customised stock portfolios.
- ✓ **Portfolio Name: MOAT**
- ✓ Theme: Investment in companies with deep business barriers and leading market share.

No.	Name	Holding Percentage
1	Meta Platforms Inc	9.04%
2	Netflix, Inc.	9.07%
3	NVIDIA Corporation	7.47%
4	Shopify Inc.	6.13%
5	Intuit Inc.	4.59%
6	Spotify Technology SA	5.07%
7	Microsoft Corporation	4.46%

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# How can I invest in U.S. Stocks?

No.	Name	Holding Percentage
8	Advanced Micro Devices, Inc.	5.94%
9	JPMorgan Chase & Co.	4.39%
10	Apple, Inc.	3.90%
11	Salesforce.com, Inc	4.75%
12	ASML Holding NV	5.15%
13	Amazon.com Inc.	4.22%
14	Alphabet Inc. - Class C Shares	3.59%
15	MasterCard Inc.	3.86%
16	Taiwan Semiconductor Manufacturing Co.	3.63%
17	Visa, Inc.	3.28%
18	Bank of America Corp.	3.19%
19	Tesla, Inc.	1.79%
20	Walt Disney Company, The	2.99%
21	QUALCOMM Incorporated	3.50%

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# How can I invest in U.S. Stocks?

Schemes	Weighted Returns as on 01-07-2024 (\$ terms) CAGR					
	1 M	3 M	6 M	1 Yr	3 Yr	5 Yrs
MOAT portfolio	3.60%	3.25%	31.50%	47.42%	10.47%	25.08%
S&P 500 Index (USD)	3.63%	4.41%	15.44%	22.88%	8.22%	13.06%

Source: <https://app.vested.co.in/>

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# How can I invest in U.S. Stocks?

- ✓ Investing through structured customised stock portfolios.
- ✓ **Portfolio Name: SAAS (Software As A Service)**
- ✓ Theme: Investment in the most promising software companies of U.S.A.

No.	Name	Holding Percentage
1	HubSpot, Inc.	6.81%
2	Adobe Systems Inc.	6.53%
3	Workday, Inc.	5.88%
4	AppFolio, Inc.	5.92%
5	Microsoft Corporation	5.56%
6	ServiceNow, Inc.	6.08%
7	Salesforce.com, Inc	5.93%
8	Veeva Systems Inc.	3.95%
9	Qualys, Inc.	4.50%
10	Toast Inc	3.11%

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# How can I invest in U.S. Stocks?

No.	Name	Holding Percentage
11	Datadog Inc	4.44%
12	CloudFlare Inc.	4.18%
13	Square, Inc.	3.98%
14	Snowflake Inc.	3.63%
15	CrowdStrike Holdings, Inc.	5.22%
16	DigitalOcean Holdings, Inc.	4.07%
17	Atlassian Corporation PLC	3.56%
18	Five9 Inc	3.24%
19	Paycom Software, Inc.	1.88%
20	Paylocity Holding Corporation	2.16%
21	RingCentral, Inc.	2.90%
22	PayPal Holdings, Inc.	2.25%
23	Sprout Social Inc	2.22%
24	ZoomInfo Technologies	1.18%
25	Bill.com Holdings Inc	0.84%

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# How can I invest in U.S. Stocks?

Schemes	Weighted Returns as on 01-07-2024 (\$ terms) CAGR					
	1 M	3 M	6 M	1 Yr	3 Yr	5 Yrs
SAAS (Software As A Service) portfolio	8.68%	-7.11%	1.54%	15.47%	-5.00%	9.30%
Nasdaq 100 (USD)	6.51%	8.30%	19.76%	30.27%	10.81%	20.59%

Source: <https://app.vested.co.in/>

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# How can I invest in U.S. Stocks?

✓ Investing through structured customised stock portfolios.

✓ **Portfolio Name: Hidden Gems**

✓ **Theme: Investment in undervalued companies with low book value and that show strong future growth potential.**

✓ **There are 19 companies with equal weightage.**

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# How can I invest in U.S. Stocks?

No.	Stocks	Weighted Returns as on 01-07-2024 (\$ terms) CAGR					
		1 M	3 M	6 M	1 Yr	3 Yr	5 Yr
1	Teradyne	0.24%	1.54%	2.05%	1.62%	0.23%	1.24%
2	Pepsico	-0.24%	-0.29%	-0.29%	-0.61%	0.16%	0.22%
3	ServiceNow	1.17%	0.16%	0.89%	2.41%	0.79%	1.36%
4	Johnson & Johnson	-0.04%	-0.36%	-0.42%	-0.52%	-0.20%	0.05%
5	Hubspot	-0.05%	-0.42%	0.49%	0.76%	0.02%	1.66%
6	Graco	-0.09%	-0.78%	-0.44%	-0.46%	0.04%	0.43%
7	Floor & Décor Holding Class A	-0.90%	-1.24%	-0.67%	-0.42%	-0.17%	0.88%
8	Deckers Outdoor Corporation	-0.77%	0.10%	2.42%	4.68%	2.06%	2.40%
9	Boyd Gaming Corporation	-0.02%	-1.03%	-0.79%	-1.10%	-0.24%	0.74%
10	Best Buy Co	-0.27%	0.04%	0.33%	0.01%	-0.55%	0.13%
11	Bloomin Brands	-0.49%	-1.66%	-1.46%	-1.47%	-0.54%	0.05%
12	The Clorox Company	0.12%	-0.57%	-0.36%	-0.81%	-0.46%	-0.13%
13	DexCom	-0.13%	-0.93%	-0.44%	-0.58%	0.08%	1.21%

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# How can I invest in U.S. Stocks?

No.	Stocks	Weighted Returns as on 01-07-2024 (\$ terms) CAGR					
		1 M	3 M	6 M	1 Yr	3 Yr	5 Yr
14	Godaddy	0.04%	0.84%	1.87%	4.38%	0.85%	0.74%
15	Alphabet Class A	0.34%	1.06%	1.95%	3.16%	0.86%	1.63%
16	International Business Machines Corp	0.30%	-0.39%	0.42%	1.55%	0.38%	0.28%
17	LPL Financial Holding	-0.07%	0.30%	1.11%	1.40%	1.30%	1.40%
18	Palo Alto Networks	0.95%	1.32%	1.08%	2.03%	2.42%	2.27%
19	Shutterstock	-0.27%	-0.87%	-1.07%	-1.23%	-1.39%	-0.04%
	<b>Hidden Gems</b>	<b>-0.19%</b>	<b>-3.17%</b>	<b>6.65%</b>	<b>14.79%</b>	<b>5.66%</b>	<b>16.53%</b>
	<b>S&amp;P 500 Index (USD)</b>	<b>3.63%</b>	<b>4.41%</b>	<b>15.44%</b>	<b>22.88%</b>	<b>8.22%</b>	<b>13.06%</b>

Source: <https://app.vested.co.in/>

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# How can I invest in U.S. Stocks?

- ✓ Investing through structured customised stock portfolios.
- ✓ **Portfolio Name: FastMovers**
- ✓ **Theme: Investment in Equities with strong fundamentals as well as technical.**
- ✓ **There are 20 companies with equal weightage.**

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# How can I invest in U.S. Stocks?

No.	Stocks	Weighted Returns as on 01-07-2024 (\$ terms) CAGR					
		1 M	3 M	6 M	1 Yr	3 Yr	5 Yr
1	Vale S.A.	-0.26%	-0.38%	-1.44%	-0.93%	-1.01%	-0.21%
2	Metallus	-0.71%	-0.47%	-0.62%	-0.43%	0.67%	1.00%
3	Nexstar Media Group	0.10%	-0.11%	0.19%	-0.02%	0.16%	0.49%
4	Stride	0.02%	0.47%	0.70%	4.26%	1.41%	0.91%
5	H&R Block	0.45%	0.68%	0.58%	3.45%	1.60%	0.68%
6	Chart Industries	-0.31%	-0.62%	0.18%	-0.54%	-0.08%	0.66%
7	FMC Corporation	-0.20%	-0.49%	-0.63%	-2.33%	-0.98%	-0.39%
8	Companhia Paranaense de Energia	-0.32%	-0.58%	-0.98%	-0.09%	0.68%	0.30%
9	Cigna Corp	-0.22%	-0.52%	0.26%	0.82%	0.55%	0.77%
10	American Equity Investment Life Holding	0.42%	1.18%	2.18%	4.14%	0.75%	-0.60%
11	Acadia Healthcare Company	-0.11%	-0.60%	-0.72%	-0.77%	0.09%	0.72%
12	BJ's Wholesale Club Holdings	0.01%	0.81%	1.45%	1.91%	1.14%	1.35%
13	Commercial Metals Company	-0.14%	-0.44%	0.33%	0.00%	0.99%	1.21%

**Our partner in foreign equity investment : Vested Finance Inc. – U.S.A.**

# How can I invest in U.S. Stocks?

No.	Stocks	Weighted Returns as on 01-07-2024 (\$ terms) CAGR					
		1 M	3 M	6 M	1 Yr	3 Yr	5 Yr
14	Ensign Group	0.18%	0.01%	0.41%	1.61%	0.59%	0.92%
15	Griffon Corp	-0.28%	-0.56%	0.39%	2.86%	1.77%	1.57%
16	Harmonic	-0.18%	-0.46%	-0.50%	-1.36%	0.63%	0.83%
17	Dorian LPG	-0.86%	0.10%	-0.24%	3.03%	2.19%	1.78%
18	Mueller Industries	-0.10%	0.24%	1.02%	1.42%	1.87%	1.53%
19	O'Reilly Automotive	-0.10%	0.24%	1.02%	1.42%	1.87%	1.53%
20	Targa Resource Corporation	0.63%	0.85%	2.59%	3.52%	2.16%	1.34%
	<b>FastMovers</b>	<b>-1.99%</b>	<b>-0.65%</b>	<b>6.19%</b>	<b>21.98%</b>	<b>17.04%</b>	<b>16.39%</b>
	<b>S&amp;P 500 Index (USD)</b>	<b>3.63%</b>	<b>4.41%</b>	<b>15.44%</b>	<b>22.88%</b>	<b>8.22%</b>	<b>13.06%</b>

Source: <https://app.vested.co.in/>

Our partner in foreign equity investment : Vested Finance Inc. – U.S.A.

# How can I invest in U.S. Stocks?

- ✓ Investing through structured customised stock portfolios.
- ✓ **Portfolio Name: Multicap**
- ✓ Theme: Investment in Equities with Multiple Sectors companies.
- ✓ There are more than 30 companies with different weightage.

Our partner in foreign equity investment : Vested Finance Inc. – U.S.A.

# How can I invest in U.S. Stocks?

No.	Stocks	Weighted Returns as on 01-07-2024 (\$ terms) CAGR					
		1 M	3 M	6 M	1 Yr	3 Yr	5 Yr
1	Amazon	0.48%	0.40%	1.42%	2.31%	0.21%	0.70%
2	Goog Alphabet Inc Class C	0.23%	0.72%	1.29%	2.12%	0.54%	1.10%
3	Microsoft	0.42%	0.30%	0.93%	1.41%	0.76%	1.10%
4	Adobe Systems	0.69%	0.29%	-0.09%	0.39%	-0.04%	0.33%
5	Align Technology	-0.16%	-0.63%	-0.28%	-0.77%	-0.68%	-0.06%
6	Apple	0.29%	0.69%	0.42%	0.32%	0.41%	0.85%
7	Autodesk	0.42%	-0.13%	0.13%	0.52%	-0.14%	0.19%
8	Best Buy Co	-0.13%	0.02%	0.16%	0.00%	-0.27%	0.06%
9	Buckle	-0.15%	-0.25%	-0.61%	0.07%	-0.26%	0.39%
10	Crocs	-0.10%	0.03%	1.44%	0.66%	0.20%	1.21%
11	Discover Financial Services	0.21%	0.07%	0.46%	0.31%	0.09%	0.28%
12	EBAY	-0.04%	0.02%	0.50%	0.41%	-0.22%	0.14%
13	Etsy	-0.31%	-0.34%	-0.74%	-0.83%	-0.85%	-0.04%

Source: <https://app.vested.co.in/>

Our partner in foreign equity investment : Vested Finance Inc. – U.S.A.

# How can I invest in U.S. Stocks?

No.	Stocks	Weighted Returns as on 01-07-2024 (\$ terms) CAGR					
		1 M	3 M	6 M	1 Yr	3 Yr	5 Yr
14	Fabrinet	0.04%	0.72%	0.71%	2.21%	0.91%	0.90%
15	Foot Locker	-0.43%	-0.40%	-0.63%	-0.33%	-0.71%	-0.28%
16	FORRESTER RESEARCH	-0.09%	-0.44%	-0.83%	-1.02%	-0.70%	-0.45%
17	Intel	0.05%	-0.77%	-0.89%	-0.21%	-0.45%	-0.21%
18	Gap	-0.50%	-0.37%	0.28%	4.04%	-0.29%	0.13%
19	Generac Holding	-0.15%	0.11%	0.11%	-0.29%	-0.79%	0.34%
20	G-III Apparel Group	-0.34%	-0.15%	-0.50%	0.86%	-0.16%	-0.05%
21	Hibbett	-1.72%	-1.60%	-1.56%	-0.67%	-0.85%	0.19%
22	Interdigital	0.04%	0.49%	0.24%	0.53%	0.42%	0.32%
23	International Business Machines Corp	0.15%	-0.19%	0.21%	0.77%	0.19%	0.14%
24	iRobot Corporation	-0.11%	0.11%	-1.93%	-2.01%	-1.35%	-0.93%
25	KYNDRYL HOLDINGS	0.02%	0.60%	0.83%	2.55%	#N/A	#N/A
26	Lam Research Corporation	0.33%	0.20%	1.04%	1.57%	0.47%	1.02%

Source: <https://app.vested.co.in/>

Our partner in foreign equity investment : Vested Finance Inc. – U.S.A.

# How can I invest in U.S. Stocks?

No.	Stocks	Weighted Returns as on 01-07-2024 (\$ terms) CAGR					
		1 M	3 M	6 M	1 Yr	3 Yr	5 Yr
27	Medifast	-0.40%	-1.10%	-1.75%	-1.94%	-1.45%	-0.74%
28	Meta Platforms	0.14%	0.07%	1.14%	1.91%	0.31%	0.53%
29	Micron Technology	0.07%	0.15%	1.49%	2.65%	0.45%	0.67%
30	Netflix	0.16%	0.24%	1.09%	1.31%	0.20%	0.31%
31	Paypal Holdings	-0.22%	-0.28%	-0.15%	-0.38%	-1.04%	-0.32%
32	Raymond James Financial	0.05%	-0.10%	0.24%	0.46%	0.30%	0.41%
33	Skechers USA INC	-0.10%	0.25%	0.22%	0.66%	0.25%	0.40%
34	Take-Two Interactive Software	-0.14%	0.07%	-0.08%	0.11%	-0.12%	0.15%
35	YELP	-0.04%	-0.22%	-0.55%	-0.02%	-0.10%	0.03%
36	YETI Holdings, Inc.	-0.29%	-0.09%	-0.67%	-0.12%	-0.66%	0.11%
37	Adeia	-0.12%	0.09%	-0.27%	0.06%	0.61%	0.39%
38	Xperi	-0.11%	-0.79%	-0.73%	-1.00%	#N/A	#N/A

Source: <https://app.vested.co.in/>

Our partner in foreign equity investment : Vested Finance Inc. – U.S.A.

# How can I invest in U.S. Stocks?

Schemes	Weighted Returns as on 01-07-2024 (\$ terms) CAGR					
	1 M	3 M	6 M	1 Yr	3 Yr	5 Yrs
Multicap	-1.89%	-2.21%	2.11%	18.62%	-4.80%	9.29%
Nasdaq 100 (USD)	6.51%	8.30%	19.76%	30.27%	10.81%	20.59%

Source: <https://app.vested.co.in/>

Our partner in foreign equity investment : Vested Finance Inc. – U.S.A.

# How can I invest in U.S. Stocks?

- ✓ Investing through structured customised stock portfolios.
- ✓ **Portfolio Name: FocusedTech**
- ✓ Theme: Investment in few companies by creating Focused Portfolio
- ✓ There are less than 20 companies with different weightage.

Our partner in foreign equity investment : Vested Finance Inc. – U.S.A.

# How can I invest in U.S. Stocks?

No.	Stocks	Weighted Returns as on 01-07-2024 (\$ terms) CAGR					
		1 M	3 M	6 M	1 Yr	3 Yr	5 Yr
1	Microsoft	2.09%	1.51%	4.63%	7.03%	3.78%	5.50%
2	Alphabet Class A	0.46%	1.43%	2.58%	4.24%	1.08%	2.19%
3	Amazon.com	1.27%	1.08%	3.78%	6.17%	0.57%	1.86%
4	Nvidia Corporation	1.05%	4.88%	20.55%	25.10%	10.82%	12.66%
5	Apple	0.41%	0.96%	0.59%	0.44%	0.58%	1.19%
6	Synopsys	0.47%	0.28%	1.34%	2.51%	1.92%	2.31%
7	Mercadolibre	-0.17%	0.13%	0.13%	1.01%	0.03%	0.63%
8	ServiceNow	0.59%	0.08%	0.44%	1.21%	0.39%	0.68%
9	Novo Nordisk A/S	0.40%	0.77%	2.33%	4.53%	2.81%	2.27%
10	T-Mobile US	0.17%	0.50%	0.53%	1.43%	0.36%	0.96%
11	Illumina Inc	0.09%	-0.31%	-0.36%	-0.72%	-0.66%	-0.37%
12	Intuit	0.44%	0.05%	0.23%	1.32%	0.30%	0.59%
13	Netflix	0.19%	0.29%	1.31%	1.58%	0.24%	0.37%

Source: <https://app.vested.co.in/>

Our partner in foreign equity investment : Vested Finance Inc. – U.S.A.

# How can I invest in U.S. Stocks?

No.	Stocks	Weighted Returns as on 01-07-2024 (\$ terms) CAGR					
		1 M	3 M	6 M	1 Yr	3 Yr	5 Yr
14	Airbnb	0.07%	-0.14%	0.26%	0.29%	-0.01%	#N/A
15	KLA Tencor Corporation	0.52%	0.87%	2.53%	3.75%	2.04%	2.48%
16	Veeva System	0.33%	-1.16%	-0.22%	-0.41%	-0.92%	0.12%
	FocusedTech	7.35%	11.88%	38.09%	59.69%	24.76%	33.90%
	S&P 500 Index (USD)	-0.04%	2.36%	1.67%	22.02%	-3.19%	10.08%

Source: <https://app.vested.co.in/>

Our partner in foreign equity investment : Vested Finance Inc. – U.S.A.

# How can I invest in U.S. Stocks?

- ✓ Investing through structured customised stock portfolios.
- ✓ **Portfolio Name: EVTECH**
- ✓ **Theme: Investment in companies which is working on Electric Vehicle Theme.**
- ✓ **There are 10 companies with different weightage.**

**Our partner in foreign equity investment : Vested Finance Inc. – U.S.A.**

# How can I invest in U.S. Stocks?

No.	Stocks	Weighted Returns as on 01-07-2024 (\$ terms) CAGR					
		1 M	3 M	6 M	1 Yr	3 Yr	5 Yr
1	Tesla	3.24%	3.36%	-2.64%	-4.25%	-0.41%	11.76%
2	Ameren Corporation	-0.66%	-0.54%	-0.70%	-2.34%	-0.69%	-0.19%
3	Eaton Corporation plc	-0.56%	0.02%	4.61%	8.35%	4.15%	4.54%
4	Taiwan Semiconductor Manufacturing Co	1.35%	2.62%	8.37%	8.05%	1.60%	3.96%
5	Plug Power Inc	-3.05%	-3.03%	-4.53%	-7.01%	-5.32%	0.03%
6	NIO Inc	-1.35%	-0.34%	-3.78%	-4.46%	-4.45%	0.90%
7	Amphenol Corporation	0.17%	1.29%	2.76%	4.24%	1.76%	1.58%
8	Albemarle Corporation	-1.36%	-1.72%	-2.36%	-4.03%	-1.21%	0.47%
9	General Motors Co	0.10%	0.14%	1.47%	0.99%	-0.38%	0.19%
10	Modine Manufacturing Co	0.11%	0.37%	2.83%	7.87%	3.34%	1.92%

Source: <https://app.vested.co.in/>

Our partner in foreign equity investment : Vested Finance Inc. – U.S.A.

# How can I invest in U.S. Stocks?

Schemes	Weighted Returns as on 01-07-2024 (\$ terms) CAGR					
	1 M	3 M	6 M	1 Yr	3 Yr	5 Yrs
EVTECH	-2.00%	2.15%	6.04%	7.42%	-1.61%	25.17%
Nasdaq 100 (USD)	6.51%	8.30%	19.76%	30.27%	10.81%	20.59%

Source: <https://app.vested.co.in/>

Our partner in foreign equity investment : Vested Finance Inc. – U.S.A.

# How can I invest in U.S. Stocks?

- ✓ Investing through structured customised stock portfolios.
- ✓ **Portfolio Name: BrandFocus**
- ✓ **Theme: Investment in few companies of different sectors.**
- ✓ **There are less than 10 companies with same weightage.**

**Our partner in foreign equity investment : Vested Finance Inc. – U.S.A.**

# How can I invest in U.S. Stocks?

No.	Stocks	Weighted Returns as on 01-07-2024 (\$ terms) CAGR					
		1 M	3 M	6 M	1 Yr	3 Yr	5 Yr
1	Wells Fargo & Co.	0.21%	0.52%	2.28%	3.96%	1.01%	0.49%
2	Teradyne	0.48%	3.08%	4.10%	3.25%	0.45%	2.48%
3	Microsoft	1.04%	0.76%	2.32%	3.51%	1.89%	2.75%
4	Masco Corporation	-0.58%	-1.67%	-0.28%	1.38%	0.32%	1.03%
5	Alphabet INC Class A	0.57%	1.77%	3.24%	5.26%	1.43%	2.72%
6	Comcast Corporation	-0.36%	-0.97%	-1.26%	-0.86%	-1.29%	-0.22%
7	Intel Corporation	0.18%	-3.07%	-3.55%	-0.83%	-1.80%	-0.85%
8	Merck & Co. Inc.	-0.04%	-0.24%	1.29%	1.19%	1.79%	0.96%
9	Rockwell Automation Inc	0.29%	-0.63%	-1.33%	-1.94%	-0.24%	1.00%
10	T. Rowe Price Group, Inc	-0.26%	-0.54%	0.55%	0.05%	-1.71%	0.09%

Source: <https://app.vested.co.in/>

Our partner in foreign equity investment : Vested Finance Inc. – U.S.A.

# How can I invest in U.S. Stocks?

Schemes	Weighted Returns as on 01-07-2024 (\$ terms) CAGR					
	1 M	3 M	6 M	1 Yr	3 Yr	5 Yrs
BrandFocus	1.54%	-0.99%	7.37%	14.98%	1.86%	10.45%
Nasdaq 100 (USD)	6.51%	8.30%	19.76%	30.27%	10.81%	20.59%

Source: <https://app.vested.co.in/>

Our partner in foreign equity investment : Vested Finance Inc. – U.S.A.

# How can I invest in U.S. Stocks?

## INVESTMENT HORIZON FOR DIRECT STOCKS & STOCK PORTFOLIOS

- ✓ **Worthwhile to hold investments for a period of 5 years & beyond ideally to fetch the best returns.**
- ✓ **Converting funds back to INR within 3 years can affect overall the returns due to transaction costs for fund transfer.**

**Our partner in foreign equity investment : Vested Finance Inc. – U.S.A.**



**Option 2:  
Investing through  
Exchange Traded  
Funds (ETFs)**



# How can I invest in U.S. ETFs?

Our partner in foreign equity investments : Vested Finance Inc. – U.S.A.

Invest in U.S. ETFs of  
YOUR CHOICE from a  
wide universe of ETFs.

# How can I invest in U.S. ETFs?

- ✓ Investing in precious metals through international Exchange Traded Funds (ETFs).
- ✓ **ETF Name: Silver Trust ETF iShares**
- ✓ Theme: The ETF invests 100% in silver metal in the international markets.

Schemes	Returns as on 01-07-2024 (\$ terms) CAGR				
	1 M	3 M	1 Yr	5 Yrs	10 Yrs
Silver Trust ETF iShares	-3.73%	17.45%	27.80%	13.78%	2.95%

Source: <https://app.vested.co.in/>

Our partner in foreign equity investment : Vested Finance Inc. – U.S.A.

# How can I invest in U.S. ETFs?

- ✓ Investing in precious metals through international Exchange Traded Funds (ETFs).
- ✓ **ETF Name: Aberdeen Standard Physical Platinum Shares ETF**
- ✓ **ETF Theme: The ETF invests 100% in platinum metal in the international markets.**

Schemes	Returns as on 01-07-2024 (\$ terms) CAGR				
	1 M	3 M	1 Yr	5 Yrs	10 Yrs
Aberdeen Standard Physical Platinum Shares ETF	-7.59%	3.02%	-2.34%	3.01%	-4.51%

Source: <https://app.vested.co.in/>

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# How can I invest in U.S. ETFs?

- ✓ Investing in Debt Funds through international Exchange Traded Funds (ETFs).
- ✓ **ETF Name: Schwab Short-Term U.S. Treasury ETF**
- ✓ **ETF Theme: The ETF invests at least 90% in United States Treasury Notes.**

Schemes	Returns as on 01-07-2024 (\$ terms) CAGR				
	1 M	3 M	1 Yr	5 Yrs	10 Yrs
Schwab Short-Term U.S. Treasury ETF	0.68%	0.82%	4.04%	0.97%	1.05%

Source: <https://app.vested.co.in/>

Our partner in foreign equity investment : Vested Finance Inc. – U.S.A.

# How can I invest in U.S. ETFs?

- ✓ Investing in Debt Funds through international Exchange Traded Funds (ETFs).
- ✓ **ETF Name: iShares 1-3 Year Treasury Bond ETF**
- ✓ ETF Theme: The ETF invests at least 90% in United States Treasury Notes.

Schemes	Returns as on 01-07-2024 (\$ terms) CAGR				
	1 M	3 M	1 Yr	5 Yrs	10 Yrs
iShares 1-3 Year Treasury Bond ETF	0.74%	0.75%	4.18%	0.90%	0.99%

Source: <https://app.vested.co.in/>

Our partner in foreign equity investment : Vested Finance Inc. – U.S.A.

# How can I invest in U.S. Stocks?



Our partner in foreign equity investment : Vested Finance Inc. – U.S.A.

# How can I invest in U.S. Stocks?

## INVESTMENT HORIZON FOR U.S. ETFs

- ✓ **Worthwhile to hold investments for a period of 5-10 years & beyond ideally to fetch the best returns for such investments.**
- ✓ **Converting funds back to INR within 3 years is can affect the returns due to transaction costs for fund transfer.**

**Our partner in foreign equity investment : Vested Finance Inc. – U.S.A.**