

**Old Bridge Capital Management Private Limited**  
**Form CRS – Client Relationship Summary**

June 21, 2024

**Introduction**

Old Bridge Capital Management Private Limited ("the Firm"), is an investment adviser registered with the Securities and Exchange Commission. It is important for you to understand how advisory and brokerage services and fees differ in order to determine which type of account is right for you. There are free and simple tools available to research firms and financial professionals at [www.investor.gov/CRS](http://www.investor.gov/CRS), which also provides educational materials about investment advisers, broker-dealers, and investing.

**What investment services and advice can you provide me?**

The Firm offers a range of investment related services including but not limited to fee based advisory services, discretionary and non- discretionary portfolio management services, research services and sub-advisory services to Investment Managers. Currently, the Firm advises primarily on Indian securities. Our account minimum for discretionary/non-discretionary portfolio management services is \$59,949 (INR 5,000,000).

If you wish to avail any of our services, we will meet with you to understand your current financial situation, existing resources, goals, and risk tolerance. Based on what we learn, we'll recommend a portfolio of investments that is monitored at least annually, and if necessary, rebalanced to meet your changing needs, stated goals and objectives. We will offer you advice on a regular basis and contact you at least annually to discuss your portfolio.

If you wish to avail discretionary portfolio management services, you will not be consulted before buying and selling securities in your account. You will sign a portfolio management services agreement with our firm giving us this authority. This agreement will remain in place until you, or we, terminate the relationship. If you opt for non-discretionary services, you will make the ultimate decision regarding the purchase or sale of investments.

*Additional information about our advisory services is in Item 4 of our Firm Brochure, which is available online at <https://adviserinfo.sec.gov/firm/summary/299571>.*

**Conversation Starter****Ask your financial professional:**

- **Given my financial situation, should I choose an investment advisory service? Why or why not?**
- How will you choose investments to recommend to me?
- What is your relevant experience, including your licenses, education and other qualifications?
- What do those qualifications mean?

**What fees will I pay?**

The Firm receives compensation from you based both on the percentage of assets it manages and/or on performance achieved in your account. In case of discretionary / non-discretionary portfolio management services, the Firm deducts management fees from your account on a monthly basis and the performance fee as per terms of the agreement. In case of advisory services, the Firm will send invoices to you for the advisory fee for each month. The more assets you have in your advisory account, the more you will pay us. We therefore have an incentive to increase the assets in your advisory account in order to increase our fees.

In addition to the compensation payable to the Firm described above, clients pay their own ongoing direct investment and operating expenses.

You will pay fees and costs whether you make or lose money on your investments. Fees and costs will reduce any amount of money you make on your investments over time. Please make sure you understand what fees and costs you are paying.

The Firm does not participate in any wrap fee programs.

*Additional information about our fees is in Item 5 of our Firm Brochure, which is available online at <https://adviserinfo.sec.gov/firm/summary/299571>.*

**Conversation Starter. Ask your financial professional:**

- Help me understand how these fees and costs will affect my investments.
- If I give you \$10,000 to invest, how much will go to fees and costs and how much will be invested for me?

**What are your legal obligations to me when acting as my investment adviser? How else does your firm make money and what conflicts of interest do you have?**

*When we act as your investment adviser, we have to act in your best interest and not put our interest ahead of yours. At the same time, the way we make money creates some conflicts with your interests. You should understand and ask us about these conflicts because they can affect the investment advice, we provide you. Here are some examples to help you understand what this means:*

- Our Firm executes transactions through brokers (not affiliated with our Firm) to ensure best execution, not essentially meaning lowest execution price, but taking into consideration brokers' execution capability, financial responsibility etc.;
- Our Firm's revenue is derived from the fees we collect from your accounts;
- Neither the Firm nor any of its principals or employees receives any compensation for the sale of securities or other investment products, including charges or fees from the sale of mutual funds;
- Our Firm does not receive any compensation from any fund manager or other third-party for the investments that it selects for client accounts.

*Additional information about our conflicts of interest is in Item 11 and 12 of our Firm Brochure, which is available online at <https://adviserinfo.sec.gov/firm/summary/299571>.*

**Conversation Starter. Ask your financial professional:**

- How might your conflicts of interest affect me, and how will you address them?

**How do your financial professionals make money?**

Our financial professionals are employees of our firm and are paid a salary and performance linked incentive compensation based on the success of our firm and performance of the employees.

**Do you or your financial professionals have legal or disciplinary history?**

No, our firm and financial professionals do not have any legal and disciplinary history to disclose. Visit <https://www.investor.gov/CRS> for a free and simple search tool to research our firm and our financial professionals.

**Conversation Starter. Ask your financial professional:**

- As a financial professional, do you have any disciplinary history?
- For what type of conduct?

**Additional Information**

You can find additional information about our firm's investment advisory services on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by clicking on the FIRM tab and then searching CRD #299571. You may also contact our Firm at 91-22-62449191 (between 09.00 to 18.00 IST) to request a copy of this relationship summary and other up-to-date information.

**Conversation Starter. Ask your financial professional:**

- Who is my primary contact person?
- Is he or she a representative of an investment adviser?
- Who can I talk to if I have concerns about how this person is treating me?