



Investing, through cycles!

What is the Buoyant Opportunities Strategy?

A “good company” is different from a “good investment” - valuations matter. Different market-capitalization indices, sectors and stocks operate in cycles.

A simple ‘Buy and Hold’ framework misses out on the inevitability of cycles. Our Core & Satellite framework allows us to adopt as “Aggressive stance” when we intend to generate superior returns, and adopt a “Defensive stance” when we want to protect capital.

Overall, it results in superior risk-adjusted long-term returns.

Key Attributes



Investors First

Cat-III Open-ended AIF,
No entry/exit load,
Exit option every month



Cross-Cycle Investing

Beyond just ‘Buy and Hold’
Aggressive vs. Defensive
stance
Core and Satellite Approach



Skin in the Game

Over 6% of portfolio
Buoyant Capital and directors
We co-invest



Top performance

Over 20% CAGR
CRISIL 5-star rating
6+ years of alpha
compounding

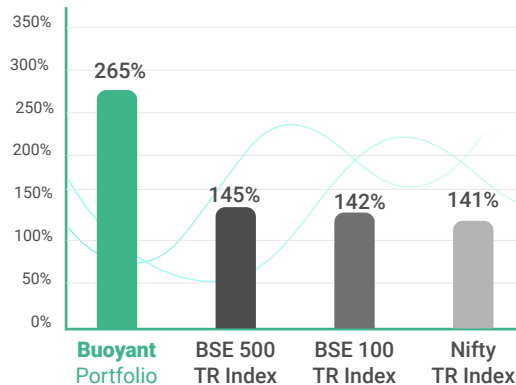
Performance at a Glance (PMS)

Total Returns(%)	Buoyant Portfolio	BSE 100 Index	Nifty 50 Index	BSE 500 Index
Since inception (1 June 2016 to date)	20.6%	13.9%	13.7%	13.6%
Last five years	12.7%	11.4%	11.9%	12.3%
Last two years	26.0%	12.3%	12.6%	12.4%
Last one year	12.5%	4.2%	5.8%	6.9%
Last month	8.4%	4.6%	4.2%	4.1%

Source: Bloomberg for BSE 100 Index, Nifty Index and BSE 500 Index.
Buoyant Portfolio is post-fees and expenses.

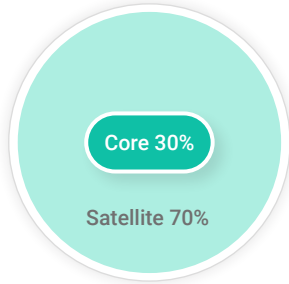
More than one year returns are annualised.

Cumulative Returns (PMS)



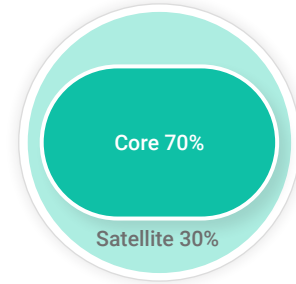
Different Stances

Aggressive cycle stance



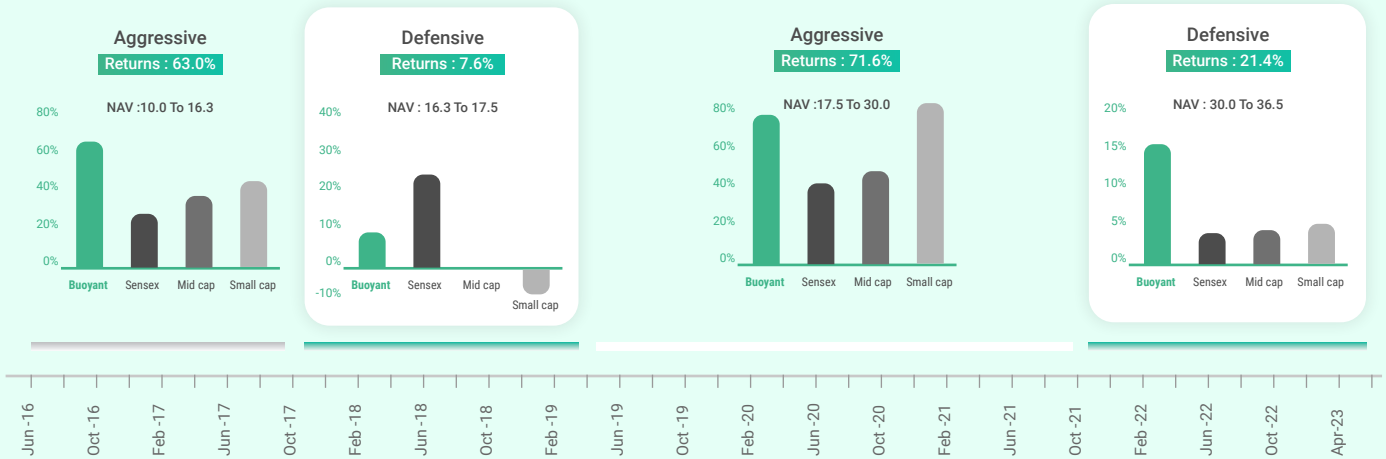
The end game **Generate superior returns**
Execution **Satellite allocation > Core allocation**

Defensive cycle stance



The end game **Protect capital**
Execution **Core allocation > Satellite allocation**

...and navigating through them!



Performance

As of 28-April-2023

Total Returns(%)	Buoyant Portfolio	BSE 100 Index	Nifty 50 Index	BSE 500 Index
Inception (Nov-22 to date)	1.3%	-2.0%	-1.3%	-1.2%
One month	3.9%	4.6%	4.2%	4.1%

Source: Bloomberg for Indices. HDFC Bank for Buoyant Portfolio. Buoyant Portfolio returns are **post-fees and expenses**.
More than one year returns are annualised.



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