

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.

Basic Details

No. of stocks
upto 25

Benchmark
BSE 100

Risk
Aggressive

Timeframe
3-5 Years

Performance at a Glance (as of April 2023)

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.

Key Attributes

Investors First

- Zero exit load
- Non model portfolio
- Online disclosures

Cross-Cycle Investing

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

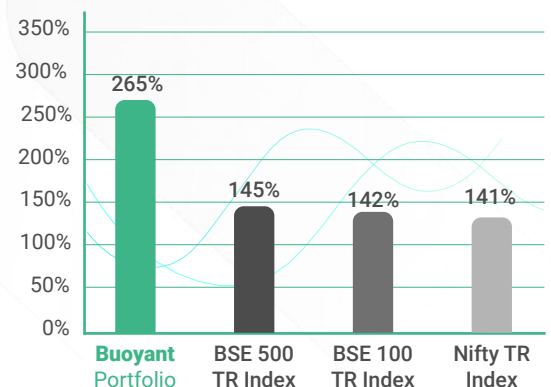
Skin in the Game

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

Top performance

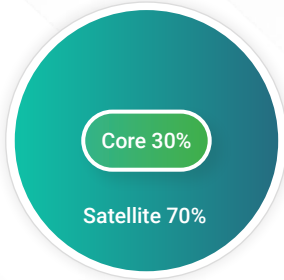
- Over 20% CAGR
- CRISIL 5-star rating
- 6+ years of alpha compounding

Cumulative Returns



Anticipating Cycles...

Aggressive cycle stance

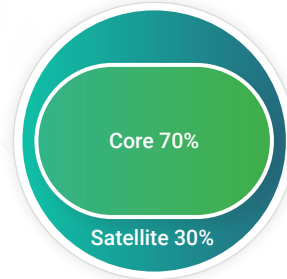


The end result
Generate superior returns

Execution

Satellite allocation > Core allocation

Defensive cycle stance

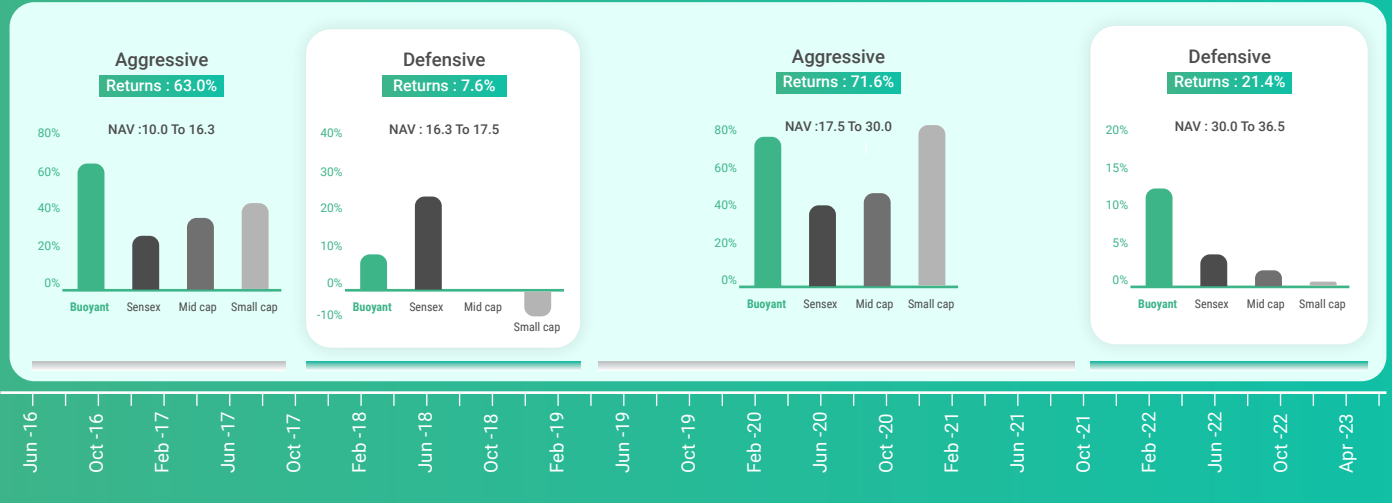


The end result
Protect capital

Execution

Core allocation > Satellite allocation

...and navigating through them!



Top Holdings

HDFC Bank

ICICI Bank

SBI

IDFC Ltd

Max Fin

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