

# 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 30

Benchmark  
BSE 500 TR

Risk  
Aggressive

Timeframe  
3-5 Years

## Performance at a Glance (as of Apr 2024)

Total Returns(%)	Buoyant Portfolio	BSE 500 TR Index	BSE 100 TR Index	NIFTY TR Index
Since inception (1 June 2016 to date)	22.9%	16.7%	15.7%	15.1%
Last five years	24.6%	18.2%	16.4%	15.3%
Last three years	30.6%	20.5%	18.6%	16.9%
Last one year	40.2%	38.6%	31.4%	26.5%
Last month	6.5%	3.4%	2.0%	1.2%

Source: Bloomberg for BSE 500 TR Index, BSE 100 TR Index and NIFTY TR 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

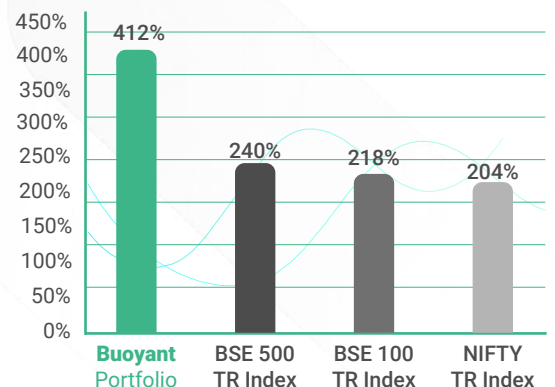
### Skin in the Game

- Significant
- Buoyant Capital and directors
- We co-invest

### Top performance

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

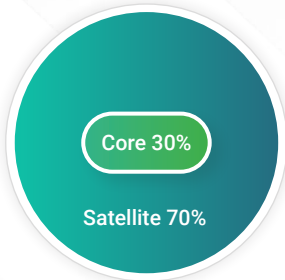
## Cumulative Returns





## Anticipating Cycles...

### Aggressive cycle stance

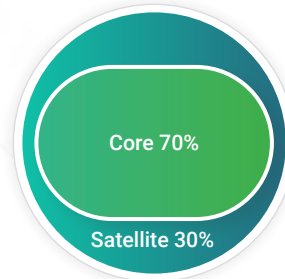


The end result  
Generate superior returns

Execution

Satellite allocation > Core allocation

### Defensive cycle stance

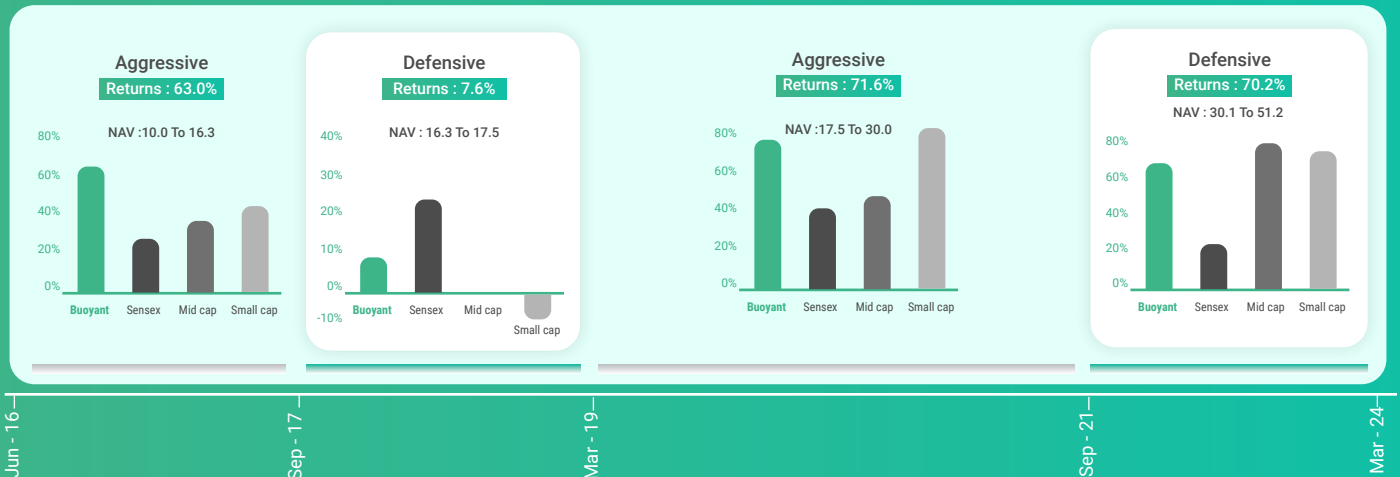


The end result  
Protect capital

Execution

Core allocation > Satellite allocation

## ...and navigating through them!



## Top Holdings

HDFC Bank

ICICI Bank

SBI

Axis Bank

Ramakrishna  
Forgings

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