

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 TRI

Risk
Aggressive

Timeframe
3-5 Years

As of 31 July 2024

	1 month	6 months	1 year	2 years	3 years	5 years	Since Inception
CAGR(%)							
Buoyant Portfolio	4.1%	18.3%	33.3%	34.7%	25.5%	29.3%	24.0%
BSE-500 TR Index	4.4%	19.6%	38.9%	27.7%	21.1%	22.5%	17.9%
Absolute(%)							
Buoyant Portfolio				81%	98%	262%	478%
BSE-500 TR Index				63%	78%	176%	283%

Source: Bloomberg for Indices. Buoyant portfolio returns are post-fees and expenses. Returns are for Buoyant Opportunities Scheme - Discretionary portfolio. More than one year returns are annualized.

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

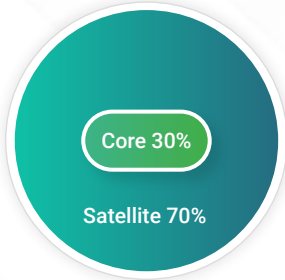
Top performance

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



Anticipating Cycles...

Aggressive cycle stance

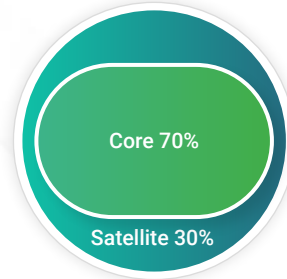


The end result
Generate superior returns

Execution

Satellite allocation > Core allocation

Defensive cycle stance

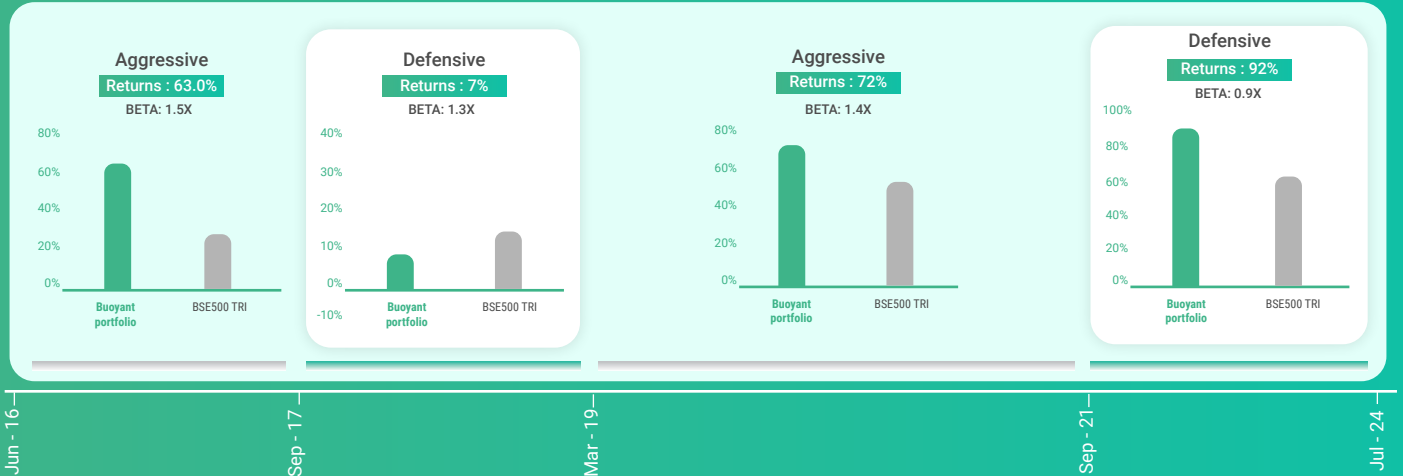


The end result
Protect capital

Execution

Core allocation > Satellite allocation

...and navigating through them!



Top Holdings

ICICI Bank

HDFC Bank

SBI

Ramkrishna
Forgings

Max Financial
Services

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