

Investing, through cycles!



What is the Buoyant Opportunities Scheme?

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 33

Benchmark
BSE 500 TRI

Risk
Aggressive

Timeframe
3-5 Years

As of 30 Oct 2024

	1 month	6 months	1 year	2 years	3 years	5 years	Since Inception
TWRR(%)							
Buoyant Portfolio	-4.6%	10.0%	28.9%	30.0%	20.6%	27.1%	23.0%
BSE-500 TR Index	-6.4%	8.7%	35.9%	22.0%	15.7%	19.8%	16.8%
Absolute(%)							
Buoyant Portfolio				69%	76%	232%	472%
BSE-500 TR Index				49%	55%	147%	270%

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.

The performance related information provided herein is not verified with SEBI.

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

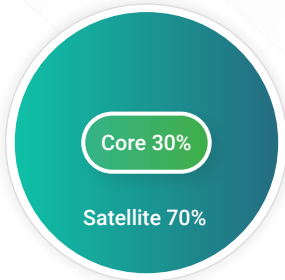
Top performance

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



Anticipating Cycles...

Aggressive cycle stance

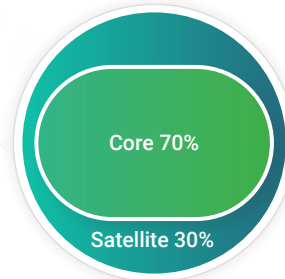


The end result
Generate superior returns

Execution

Satellite allocation > Core allocation

Defensive cycle stance

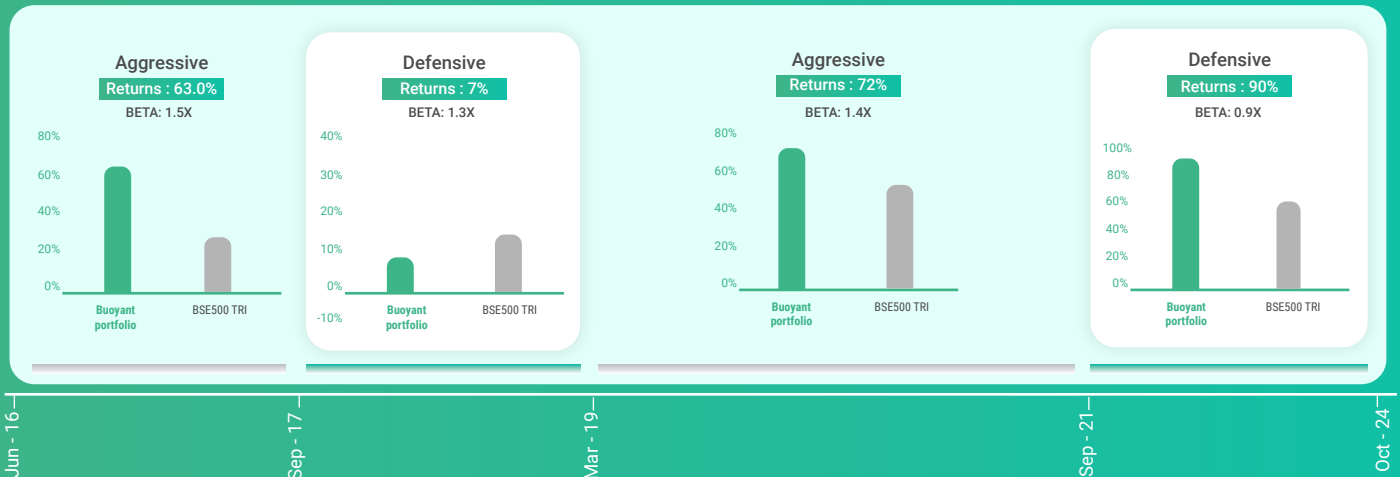


The end result
Protect capital

Execution

Core allocation > Satellite allocation

...and navigating through them!



Top Holdings

ICICI Bank

State Bank of India

HDFC Bank Ltd

Ramkrishna Forgings Ltd

Indegene Ltd

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Sakshi the chatbot

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