

Investing, through cycles!



What is the Investment Approach- 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 endeavor to generate superior returns, and adopt a “Defensive stance” when we want to protect capital.

Overall, it has resulted in endeavouring risk-adjusted returns beyond the benchmark, consistently over the long term.

Basic Details

No. of stocks
upto 33

Benchmark
BSE 500 TRI

Risk
Aggressive

Timeframe
3-5 Years

Key Attributes



Investors First

- Non model portfolio
- Online disclosures
- Zero exit load



Cross-Cycle Investing

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



Skin in the Game

- Buoyant Capital, Directors & Family Members through the alternative framework.



Top performance

- Over 20% TWRR
- Beta: 0.9X (3Y), 95% consistent 5Y rolling outperformance.
- 8 years of alpha compounding

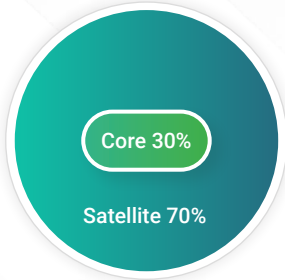
As of 28 Feb 2025	1 month	6 months	1 year	2 years	3 years	5 years	Since Inception
TWRR(%)							
Buoyant Portfolio	-6.9%	-10.6%	4.8%	24.1%	18.2%	24.5%	20.8%
BSE-500 TR Index	-7.7%	-16.1%	-0.4%	17.8%	12.6%	17.9%	14.4%
Absolute(%)							
Buoyant Portfolio				54%	65%	200%	421%
BSE-500 TR Index				39%	43%	128%	225%

Source: Bloomberg for Indices.

The performance data for the Portfolio Manager and Investment Approach provided above has not been verified by SEBI or any other regulatory authority. Performance data for periods up to 12 months is presented as absolute Returns, while data for periods exceeding 12 months is shown as TWRR. The TWRR figures provided above are net of expenses. Past performance is not indicative of future results and does not guarantee future returns.

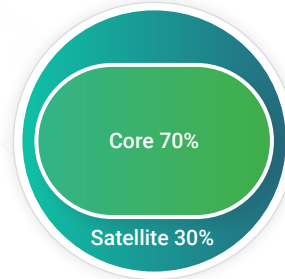
Anticipating Cycles...

Aggressive cycle stance



The end result
Endeavour to generate superior returns
Execution
Satellite allocation > Core allocation

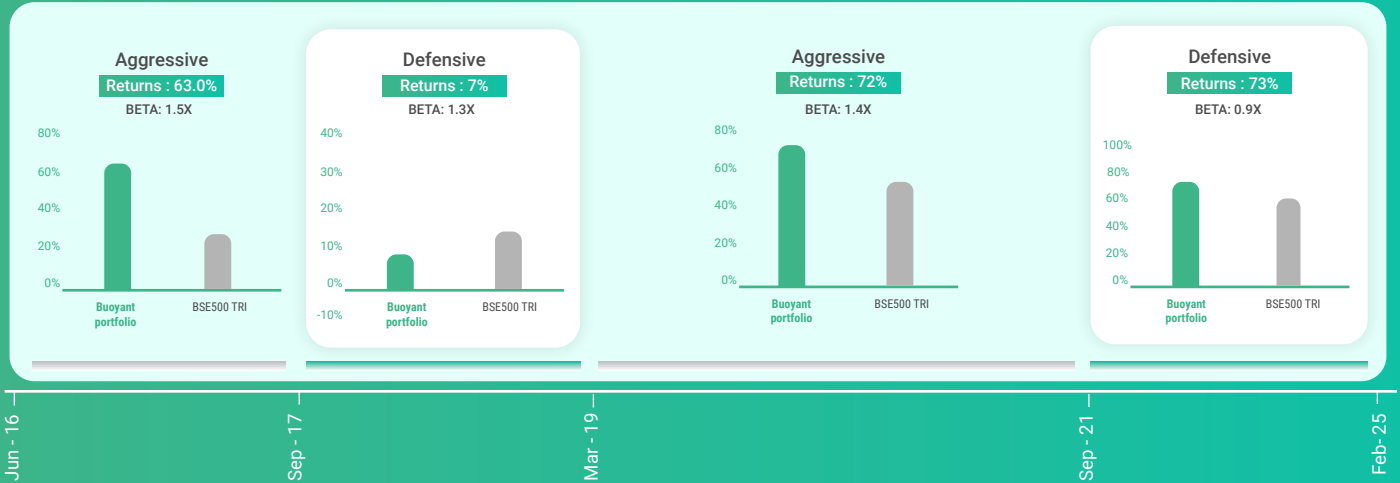
Defensive cycle stance



The end result
Endeavour to protect capital
Execution
Core allocation > Satellite allocation

Portfolio weightages may change at the discretion of the Portfolio Manager, based on market conditions, investment strategy, and other relevant factors.

...and navigating through them!



Top Holdings

State Bank of India

HDFC Bank

ICICI Bank Ltd

Axis Bank Ltd

Ramkrishna Forgings Ltd

The portfolio manager may or may not have exposure to these stocks in the portfolio. Investing in equities involves risks, including the potential loss of principal, as stock prices can fluctuate based on market conditions and company performance.

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