

CAPITAL INVESTMENT ADVISORS

(a division of Buoyant Capital Pvt Ltd)

Uncertainty on the horizon


We live in uncertain times...

A graphic of a double-lined arrow pointing to the right, with a dark blue outer line and a teal inner line.


Will **India** go to war? Is **World War III** on the horizon?

A graphic of a double-lined arrow pointing to the right, with a dark blue outer line and a teal inner line.


Can **Trump's tariffs** derail the global economy?

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Will the US-led **isolation of China** help India's economy?

A graphic of a double-lined arrow pointing to the right, with a dark blue outer line and a teal inner line.


What does it take for **Indian manufacturing** to take off?

A graphic of a double-lined arrow pointing to the right, with a dark blue outer line and a teal inner line.

How do **falling crude and commodity prices** help India?

A graphic of a double-lined arrow pointing to the right, with a dark blue outer line and a teal inner line.

Is it possible that **interest rates rise** as the US debt cliff hits us?

A background of crumpled, textured paper in shades of grey and white.

How should you manage your equity exposure?



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***Uncertainty is what makes
investing interesting!***

Uncertainty...



...hits low-quality, over-hyped businesses the most



...exposes promoters low on corporate governance



...removes irrational froth from markets



...brings stratospheric valuations to reasonable levels



...scares away sentimental, weak investors!

***Invariably, uncertainty creates
rational and sustainable
investment opportunities...***

BUOYANT OPPORTUNITIES PORTFOLIO



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Investing is all about uncertainty!



Investing involves navigating sensibly, through uncertainty.



The only two certainties are death and taxes!



Nobody knows everything, and yet we have to make decisions.



So we pick a bunch of ideas based on what we know, to the best of our abilities.



We take some calculated risks, knowing that not all outcomes may be good.

***This calculated risk taking
is precisely how we construct the
Buoyant OPPORTUNITIES portfolio!***

BUOYANT OPPORTUNITIES PORTFOLIO



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Portfolio stance

1

Exited two high-beta stocks recently

2

Large caps + cash is now **55%**

3

Banks, NBFCs + insurance = **24%**

4

Raised cash to a high of **17%**

5

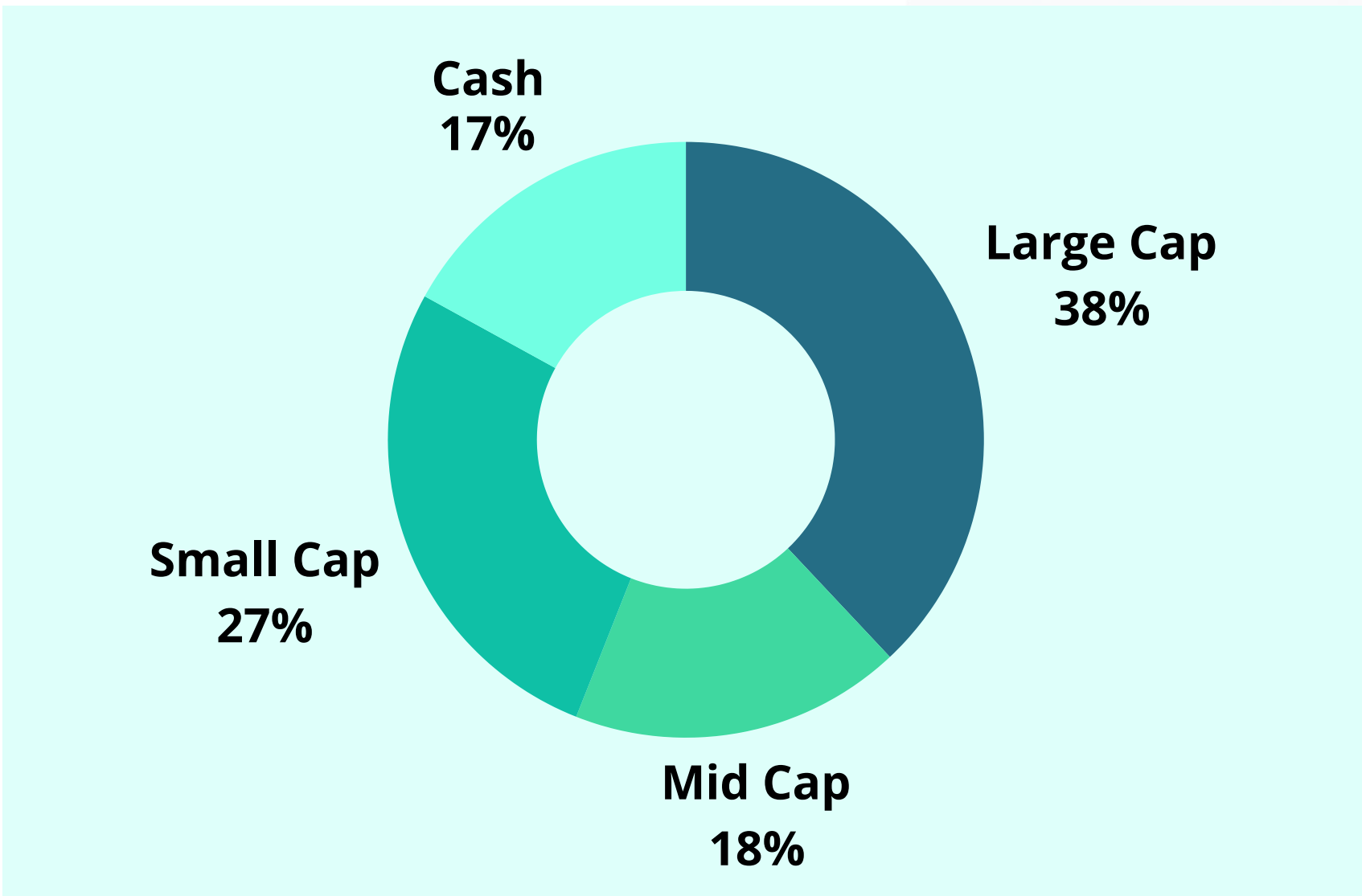
Expecting a sector rotation in market leadership

We will use cash opportunistically...

BUOYANT OPPORTUNITIES PORTFOLIO

OPPORTUNITIES
PORTFOLIO

MARKET-CAP ALLOCATION



Source : Buoyant Capital IA
Data as at end-April 2025

TOP 5 HOLDINGS*

Cash	17%
ITC	8%
State Bank of India	7%
Indegene	6%
Dalmia Bharat	6%

Source : Buoyant Capital IA

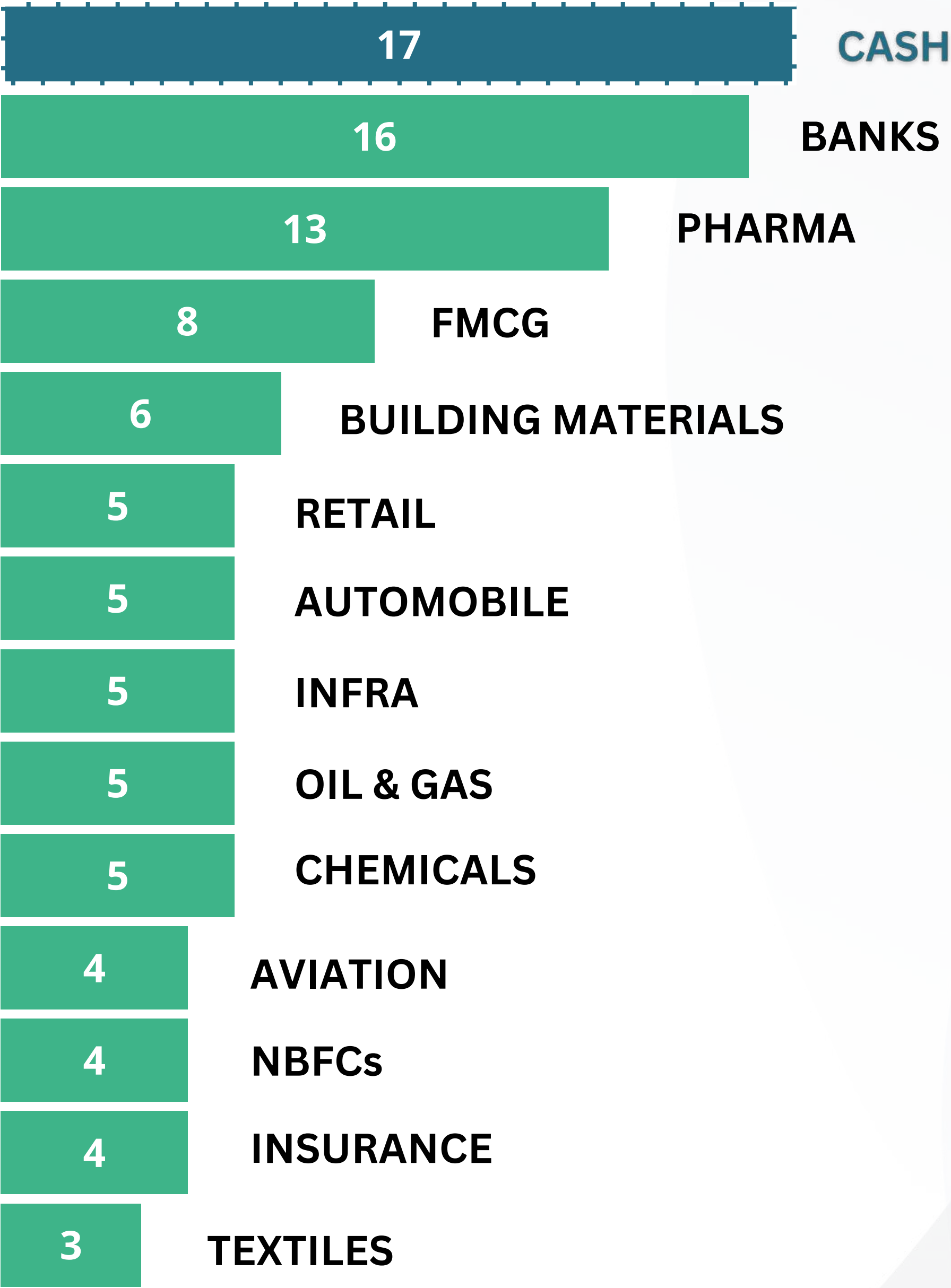
* Holdings may or may not be a part of all client portfolios. The securities quoted are for illustration only and are not recommended.
Data as at end-April 2025



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SECTOR ALLOCATION



Data as at end-April 2025

Source : Buoyant Capital IA



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OPPORTUNITIES PORTFOLIO

- A **cross-cycle, flexi-cap, moderately diversified** portfolio of listed stocks benchmarked with a broad market index.
- Model portfolio advisory service by **Buoyant Capital**, a SEBI-licensed Investment Advisor.
- Available via our **digital advisory platform**.



PORTFOLIO STRATEGY

- Aggressive during good times / favourable cycle, defensive in tough times.
- **Cross cycle investing philosophy** to reduce volatility and manage risks in line with macro, market, market-cap and sector cycles.
- Flexible, bottom-up portfolio construction that is **industry and market cap agnostic**.
- No permanent bias towards market cap (large/mid/small), sector or theme.



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DIGITAL, AFFORDABLE & CONVENIENT!



Investor, broker and advisor linked on a digital platform for trade execution with **minimal effort for the investor***!



100% digital sign-up, risk profiling and onboarding via PAN & Aadhar OTP.



PMS/AIF-like portfolio strategy now available at min. Rs. 2 lacs ticket size with top ups in multiples of Rs. 50K.



REBALANCING STRATEGY



In line with Advisor's research view on cycles, stocks and sectors.



Churn will also follow a flexible dynamic, with heavy churn when cycles change.



****Disclaimer : Right of Execution of Investments remains with the Investor only.***



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Risk Category

Aggressive (high risk)

Advisor

Dipen K Sheth

Benchmark

NIFTY 500 TRI

Min. investment

Rs. 2 lacs

Advisory fees

2% p.a. of AUA + GST

Fees collection

Every six months

Investment Style

Cross cycle, Flexicap

Recommended Time Horizon

3-5 Years

No of Stocks

12-18

A background image for the Opportunities Portfolio section, showing a close-up of a hand using a calculator and a pen, with a laptop screen visible in the background.

OPPORTUNITIES PORTFOLIO

USP

**A cross-cycle strategy
that uses a combination
of aggressive or
defensive stance
depending on the
cycle at play.**

**Flexi-cap portfolio
construction across small,
mid and large caps to
balance risk vs. reward at
different points
of time in the cycle.**



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Contact us

For more information on our
cross cycle investing framework,
or to start an advisory relationship with
Buoyant Capital Investment Advisors,
write to us at

advisory@buoyantcap.com

or WhatsApp us at
+91-81695-15927

***Start your Digital Advisory
Portfolio today!***



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Disclosures & disclaimers

Name of Investment Adviser as registered with SEBI: Buoyant Capital Private Limited.
Type of Registration: Non-Individual. **SEBI Registration number:** INA000016995.
Validity of SEBI registration: 13th June 2022 - Perpetual. **BSE IA Enlistment Number (BASL membership ID)-1844. CIN of the IA** U65990MH2014PTC253. **Registered office address:** 3501, B- Wing, Kohinoor Square, N C Kelkar Marg, R G Gadkari Chowk, Shivaji Park, Dadar West, Mumbai 400028. INDIA. **Phone:** +91-22-6931-9994. **Separately Identifiable division of IA/Trade name:** Buoyant Capital Investment Advisors (a division of Buoyant Capital Private Limited).

Standard Warning: Investments in securities markets are subject to market risks. Read all the related documents carefully before investing.

Standard Disclaimer: Registration granted by SEBI, enlistment as IA with Exchange and certification from National Institute of Securities Markets (NISM) in no way guarantee performance of the intermediary or provide any assurance of returns to investors.

BASL Advertisement Approval No: 15907