

CAPITAL INVESTMENT ADVISORS
(a division of Buoyant Capital Pvt Ltd)



What are our investors thinking?

***Is the great Indian
bull market over?***

***Will India stumble
yet again?***

***What is Buoyant's
portfolio stance?***



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Is the great Indian bull market over?

A confluence of positives is certainly not visible any more. A confluence of near term negatives has hit investor sentiment...

History teaches us that nothing lasts forever. In retrospect, nothing is as good (or as bad) as it seemed when it happened! To savour the good times, we need to ride out the difficult times gracefully...

India is currently struggling on many fronts - trade barriers, geo-politics, domestic cycle, FPI flows.

But we are also 'rising to the occasion'. We have maintained in recent Investor Memos that India's policy responses - PLI, infra spend, income tax/GST cuts, recalibrating relations with the US, China and Russia are boosters that promise better outcomes.



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Will India stumble, yet again?

Cynics argue India consistently ‘flatters to deceive’ suggesting it often promises success without delivering at crucial times.

Despite repeated ‘trysts with destiny’ in geopolitical, economic, and military spheres, India has failed to fully capitalise on opportunities that would change its fortunes.

Optimists assert that India's moment has arrived, believing the dramatic changes of the last decade have made the country's path toward global prominence irreversible.

India is uniquely positioned, armed with deft international diplomacy, a young and motivated population, improving governance, new digital/physical infra and the world's largest workforce.



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The stumble may not happen!

Supported by rapid advancements in infrastructure, governance, energy, and financial/tech innovation, the country is set to overtake Germany and become the world's third-largest economy in the next few years.

The realists believe that India will move forward, but the move will not be linear.

Near term challenges can sometimes lead to bouts of disappointment, even as the overall direction remains unchanged.

This will offer patient investors plenty of opportunity to capitalise on periods of wavering sentiment in stock markets. **We are perhaps in the midst of one such mood swing.**



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Our Portfolio stance

Markets are range bound as global uncertainty and Trump's tariff tantrum have collided with the India story

We have increased allocation to large caps, in an attempt to decrease risk in the portfolio

We are monitoring global / national data and newsflow closely

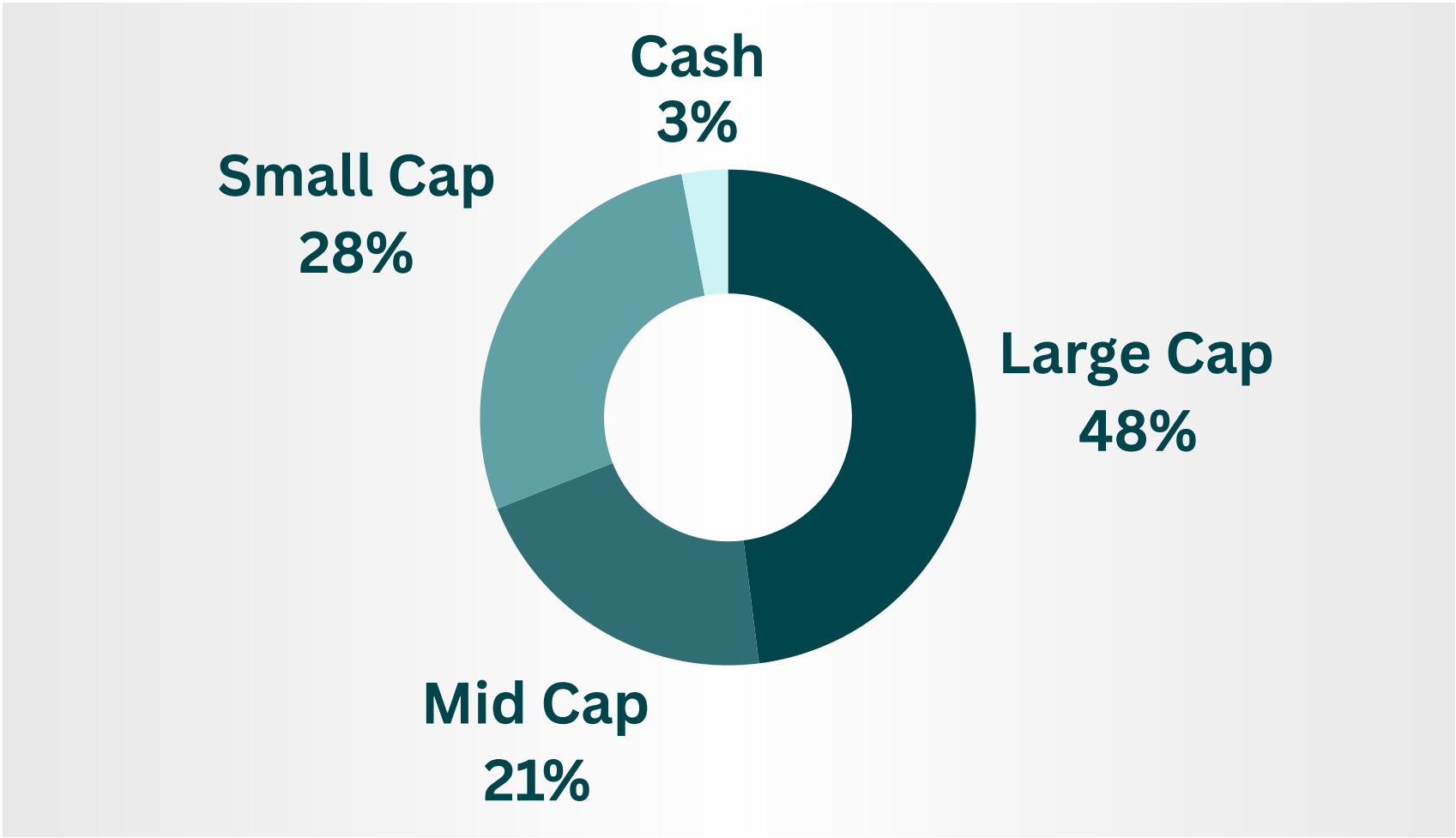
When we sense the tide changing, we will turn aggressive and increase small/mid caps



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OPPORTUNITIES
PORTFOLIO

MARKET-CAP ALLOCATION



*Source : Buoyant Capital IA
Data as at end-September 2025*

TOP 5 HOLDINGS* (EX CASH)

ITC	8%
AXIS BANK	8%
STATE BANK OF INDIA	7%
INDEGENE	6%
INFOSYS	6%

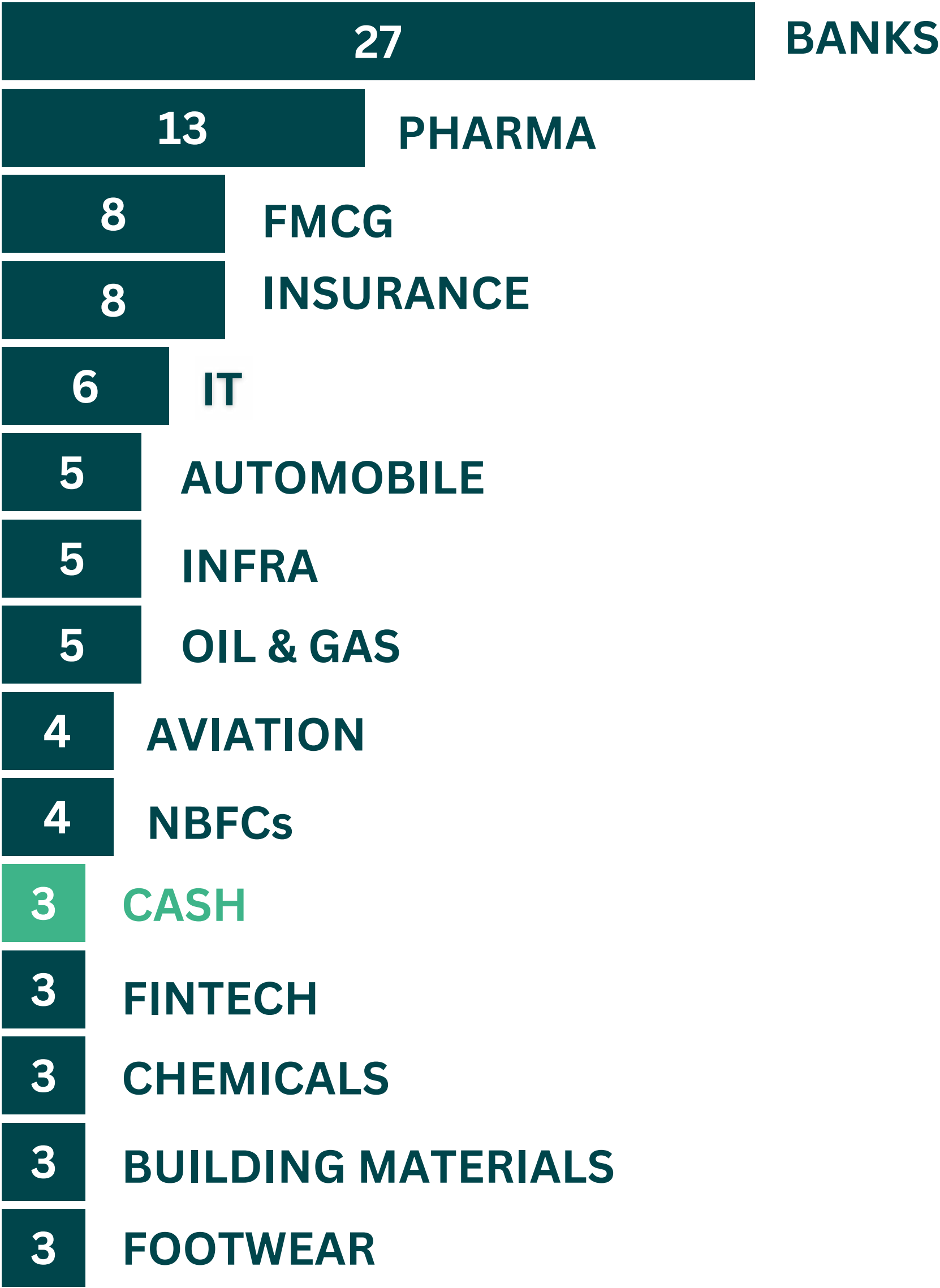
Source : Buoyant Capital IA

** 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-September 2025*



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SECTOR ALLOCATION



Data as at end-September 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.

BUOYANT OPPORTUNITIES PORTFOLIO



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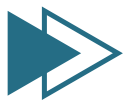
DIGITAL, AFFORDABLE & CONVENIENT!



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



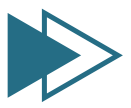
100% digital sign-up, risk profiling and onboarding via PAN & Aadhar OTP.



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.***

BUOYANT OPPORTUNITIES PORTFOLIO



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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



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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:** INA0000016995.
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