

# 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 TR

Risk  
Aggressive

Timeframe  
3-5 Years

## As of 31 May 2024

31-May-24	1 month	6 months	1 year	2 years	3 years	5 years	Since Inception
<b>CAGR(%)</b>							
<b>Buoyant Portfolio</b>	0.0%	9.9%	31.9%	29.6%	26.6%	24.0%	22.7%
BSE-500 TR Index	0.8%	17.7%	34.7%	23.3%	18.1%	18.0%	16.7%
<b>Absolute(%)</b>							
<b>Buoyant Portfolio</b>				68%	103%	193%	413%
BSE-500 TR Index				52%	65%	129%	242%

Source: Bloomberg for Indices. Buoyant portfolio returns are post-fees and expenses. Return 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

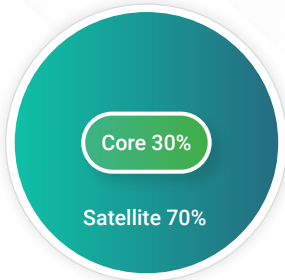
- Over 20% CAGR
- CRISIL 5-star rating
- 8 years of alpha compounding





## Anticipating Cycles...

### Aggressive cycle stance

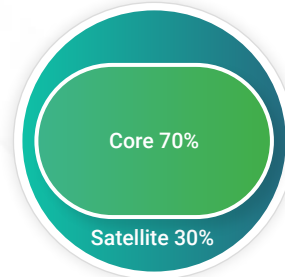


The end result  
Generate superior returns

Execution

Satellite allocation > Core allocation

### Defensive cycle stance

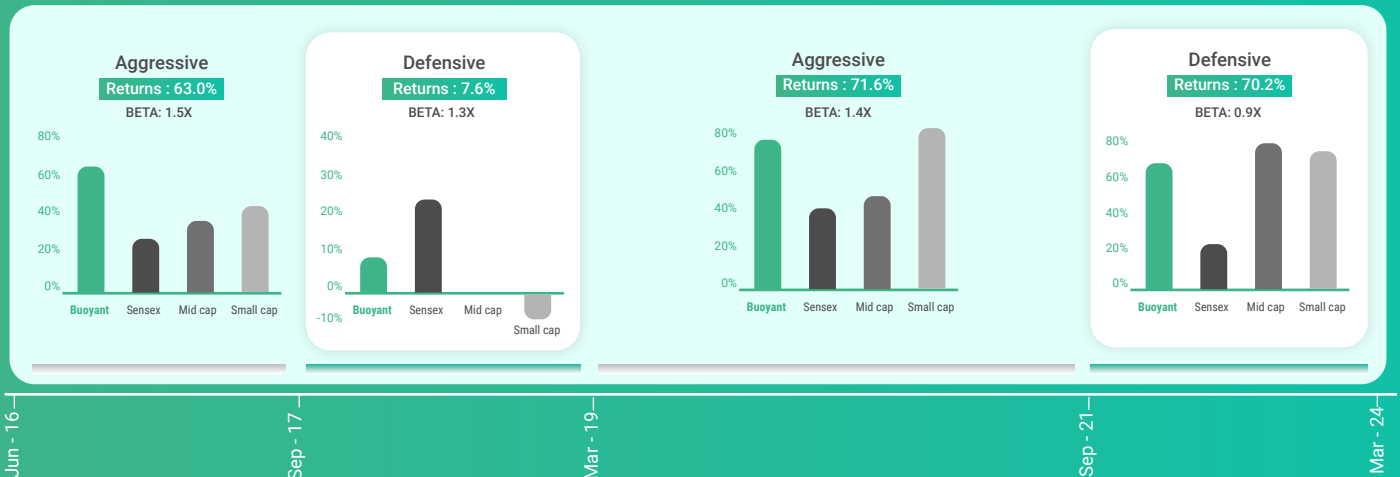


The end result  
Protect capital

Execution

Core allocation > Satellite allocation

## ...and navigating through them!



## Top Holdings

HDFC Bank

ICICI Bank

SBI

Axis Bank

Ramakrishna  
Forgings

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