

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 31

Benchmark
BSE 500 TRI

Risk
Aggressive

Timeframe
3-5 Years

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

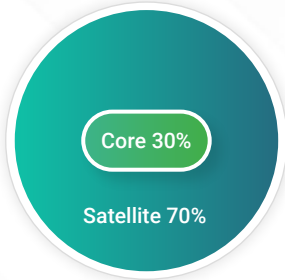
As of 31 August 2024

	1 month	6 months	1 year	2 years	3 years	5 years	Since Inception
CAGR(%)							
Buoyant Portfolio	0.8%	17.3%	29.7%	32.3%	24.6%	31.1%	23.8%
BSE-500 TR Index	1.0%	18.7%	41.1%	25.3%	18.9%	22.9%	17.8%
Absolute(%)							
Buoyant Portfolio				75%	93%	228%	483%
BSE-500 TR Index				57%	68%	180%	287%

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.

Anticipating Cycles...

Aggressive cycle stance

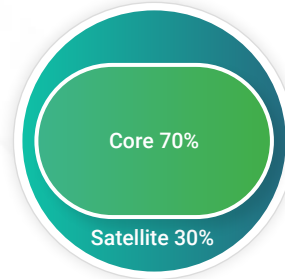


The end result
Generate superior returns

Execution

Satellite allocation > Core allocation

Defensive cycle stance

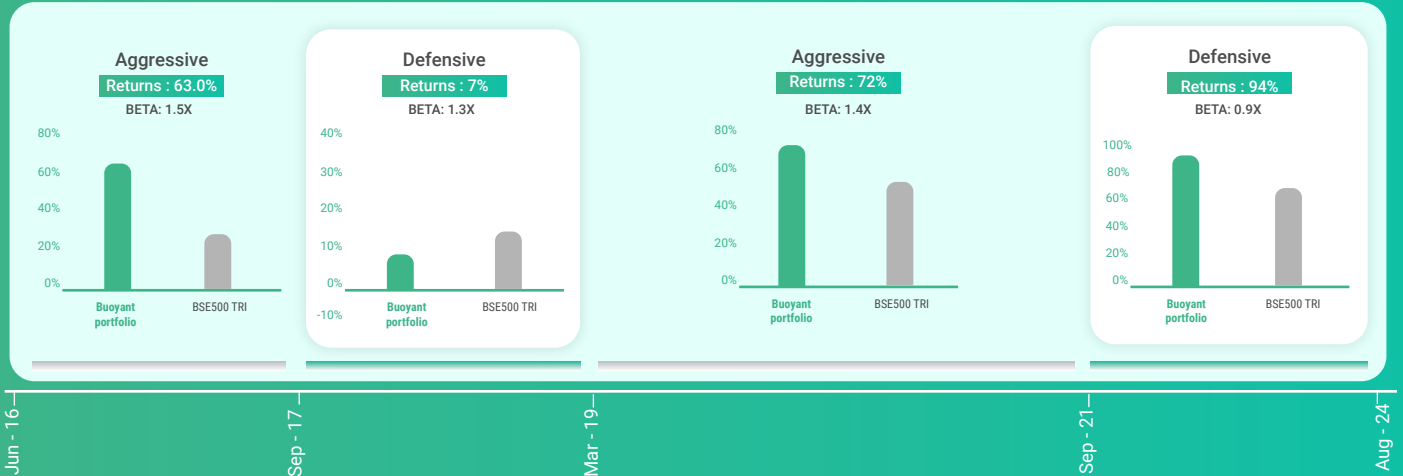


The end result
Protect capital

Execution

Core allocation > Satellite allocation

...and navigating through them!



Top Holdings

ICICI Bank

Ramakrishna
Forgings

SBI

HDFC Bank

Indegene

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