

# Investing, through cycles!



## What is the Buoyant Opportunities Scheme?

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 TRI

Risk  
Aggressive

Timeframe  
3-5 Years

As of 30 Sept 2024

	1 month	6 months	1 year	2 years	3 years	5 years	Since Inception
<b>TWRR(%)</b>							
Buoyant Portfolio	2.9%	22.8%	33.6%	35.6%	23.6%	30.1%	24.0%
BSE-500 TR Index	2.1%	20.2%	41.1%	28.7%	18.4%	22.4%	17.9%
<b>Absolute(%)</b>							
Buoyant Portfolio				84%	89%	272%	500%
BSE-500 TR Index				66%	66%	175%	295%

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.

The performance related information provided herein is not verified with SEBI.

## 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

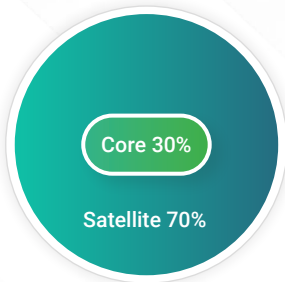
### Top performance

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



## Anticipating Cycles...

### Aggressive cycle stance

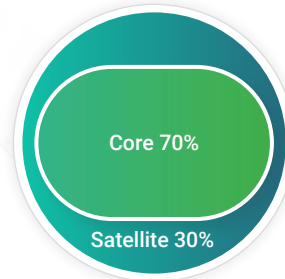


The end result  
Generate superior returns

Execution

Satellite allocation > Core allocation

### Defensive cycle stance

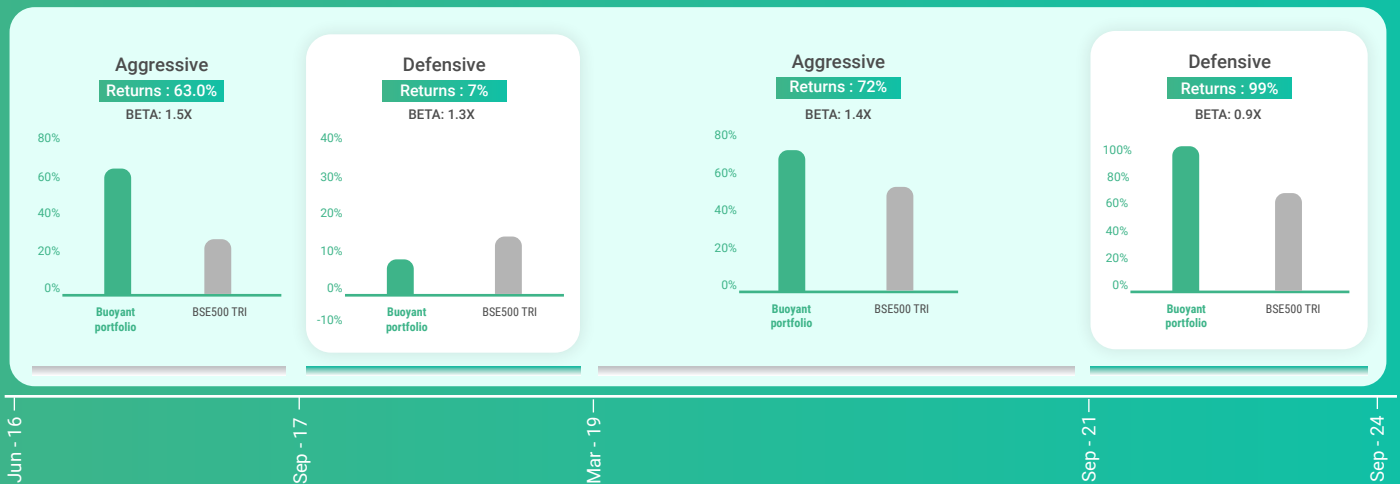


The end result  
Protect capital

Execution

Core allocation > Satellite allocation

## ...and navigating through them!



## Top Holdings

ICICI

Ramkrishna  
Forgings

HDFC

SBI

Indegene

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