

# 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 33

Benchmark  
BSE 500 TRI

Risk  
Aggressive

Timeframe  
3-5 Years

## Key Attributes



### Investors First

- Non model portfolio
- Online disclosures
- Zero Exit Load



### Cross-Cycle Investing

- Beyond just ‘Buy and Hold’
- Aggressive vs. Defensive stance
- Core and Satellite Approach



### Skin in the Game

- Buoyant Capital, Directors & Family Members through the alternative framework.



### Top performance

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

As of 31 Dec 2024	1 month	6 months	1 year	2 years	3 years	5 years	Since Inception
<b>TWRR(%)</b>							
<b>Buoyant Portfolio</b>	-1.2%	3.3%	18.8%	29.1%	19.8%	26.6%	22.6%
BSE-500 TR Index	-1.5%	-0.7%	15.8%	21.0%	15.4%	19.1%	16.2%
<b>Absolute(%)</b>							
<b>Buoyant Portfolio</b>				67%	72%	225%	474%
BSE-500 TR Index				47%	54%	139%	264%

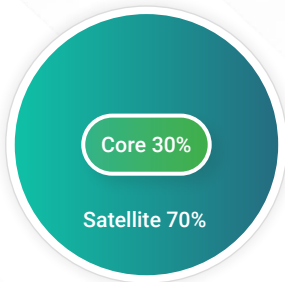
Source: Bloomberg for Indices.

The performance data for the Portfolio Manager and Investment Approach provided above has not been verified by SEBI or any other regulatory authority. Performance data for periods up to 12 months is presented as absolute Returns, while data for periods exceeding 12 months is shown as TWRR. The TWRR figures provided above are net of expenses. Past performance is not indicative of future results and does not guarantee future returns.



## Anticipating Cycles...

### Aggressive cycle stance

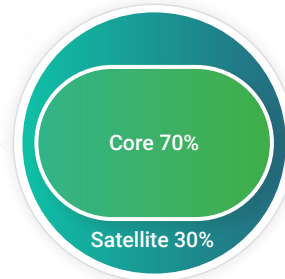


The end result  
Generate superior returns

Execution

Satellite allocation > Core allocation

### Defensive cycle stance

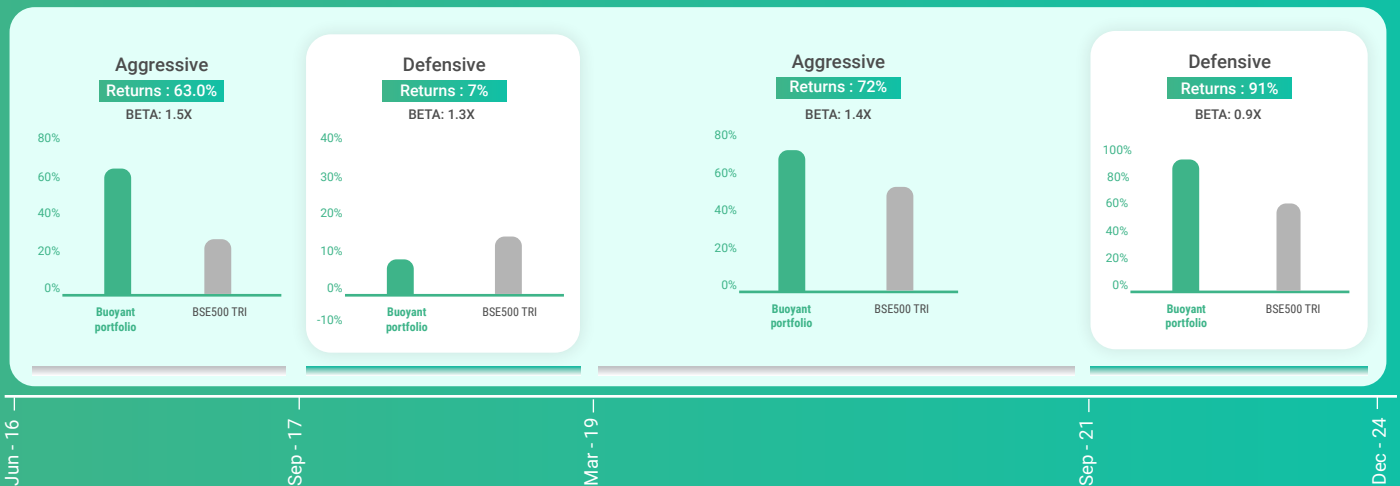


The end result  
Protect capital

Execution

Core allocation > Satellite allocation

## ...and navigating through them!



## Top Holdings

State Bank of India

ICICI Bank

HDFC Bank Ltd

Ramkrishna Forgings Ltd

One 97 Communications

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