

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 25

Benchmark
BSE 500 TR

Risk
Aggressive

Timeframe
3-5 Years

Performance at a Glance (as of Jan 2024)

Total Returns(%)	Buoyant Portfolio	BSE 500 TR Index	BSE 100 TR Index	NIFTY TR Index
Since inception (1 June 2016 to date)	22.6%	16.4%	15.5%	15.0%
Last five years	24.9%	18.5%	16.8%	16.3%
Last two years	17.8%	16.5%	14.6%	13.3%
Last one year	37.5%	33.4%	27.3%	24.3%
Last month	0.4%	1.9%	0.6%	0.0%

Source: Bloomberg for BSE 500 TR Index, BSE 100 TR Index and NIFTY TR Index. Buoyant Portfolio is post-fees and expenses.

More than one year returns are annualised.

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

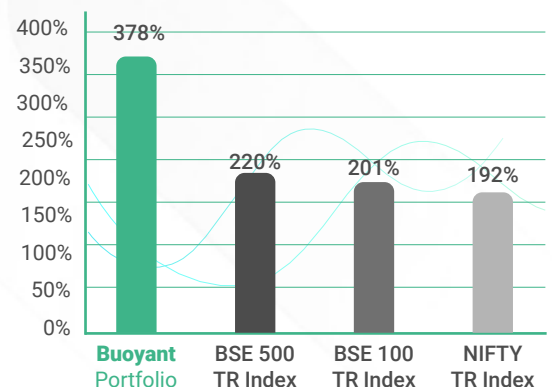
Skin in the Game

- Significant
- Buoyant Capital and directors
- We co-invest

Top performance

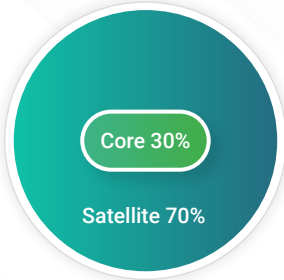
- Over 20% CAGR
- CRISIL 5-star rating
- 7 years of alpha compounding

Cumulative Returns



Anticipating Cycles...

Aggressive cycle stance

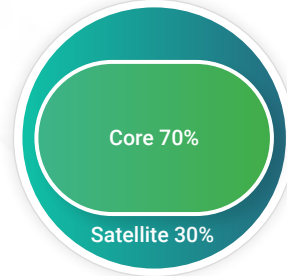


The end result
Generate superior returns

Execution

Satellite allocation > Core allocation

Defensive cycle stance

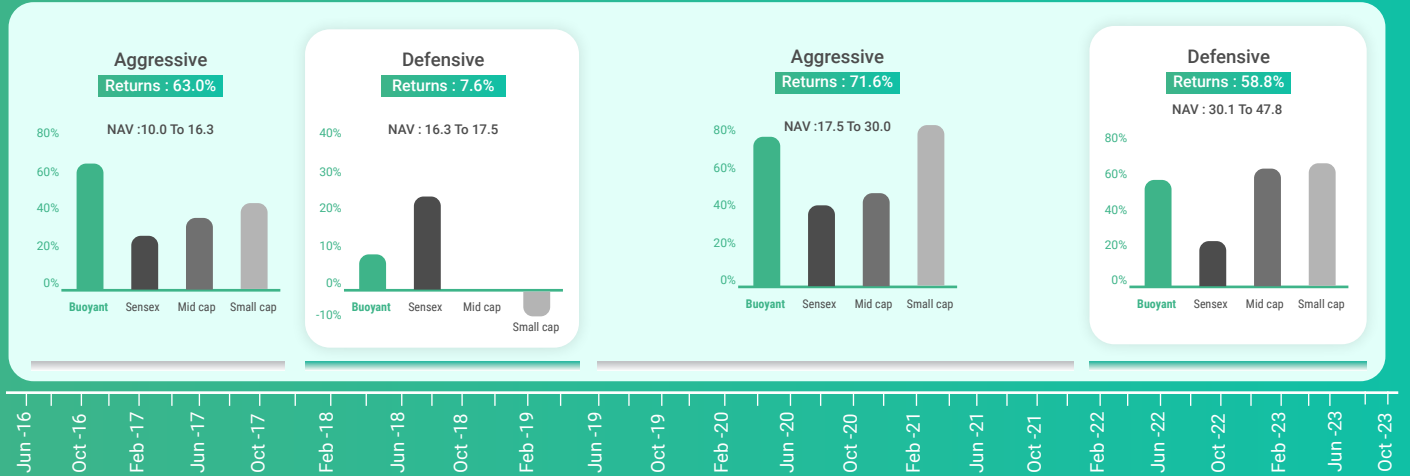


The end result
Protect capital

Execution

Core allocation > Satellite allocation

...and navigating through them!



Top Holdings

HDFC Bank

ICICI Bank

SBI

Ramkrishna
Forgings

ICICI Lombard
General Insurance

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Sakshi
the chatbot

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BUOYANT CAPITAL PVT LTD

3501 Kohinoor Square, N C Kelkar Marg,
Shivaji Park, Dadar West, Mumbai 400028

✉ info@buoyantcap.com ☎ +91 22 6931 9999

📘 🌐 📺 📱 buoyantcap.com