

ASK Emerging Opportunities Portfolio (EOP)

KEY PORTFOLIO ATTRIBUTES

ABOUT ASK INVESTMENT MANAGERS PMS

ASK Group is a renowned financial services group and a leading industry player in wealth and investment management, catering to some of the most affluent families in India. Started in 1983, it is known for strong research-based investment management, asset management, private equity, wealth advisory and multi-family office businesses.

KEY PEOPLE



(https://www.pmsaifworld.com/team_mf/bharat-shah/)

Mr. Bharat Shah
Executive Director

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(https://www.pmsaifworld.com/team_mf/nimesh-mehta/)

Mr. Nimesh Mehta
Director & Country
Head- Sales &
Products

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Investment Objective

ASK Emerging Opportunities Portfolio or ASK EOP PMS is designed to build a concentrated portfolio of quality businesses across range of market capitalization (Large, Mid and Small cap) that have superior long-term compounding potential.

The two core objectives of this ASK Emerging Opportunities Portfolio or ASK EOP PMS are: Capital Preservation and Capital Appreciation over a period of time. This is achieved through long-term investments in high-quality companies with strong growth prospects.

Investment Attributes

The investment attributes of ASK Emerging Opportunities Portfolio or ASK EOP PMS are:

Size of the Opportunity

- Size of pond v/s size of fish
- Dominance
- Resilience
- Liquidity

Earnings Growth

- Quantum
- Consistency
- Durability
- Predating (Early v/s Later)
- Compounding power

Quality of the business

- High quality of business (Superior RoCE)
- Strong moat. Impregnability
- Sustainability
- Key pivot of strong wealth creation

Value

- Favorable Price-Value Gap
- Margin of safety

Investment Philosophy

ASK's Advantage "Investing", as Buffett says, "is simple but not easy". It is the implementation of the simple things consistently and with discipline during all market conditions, that requires character, which makes all the critical difference. Core advantage lies in the disciplined and consistent execution of these 'simple' things and doing them well. Core philosophy at ASK Investment Managers revolves around two key aspects:

1. First achieve capital protection (over time) and
2. Follow it with capital appreciation.

Overarching Investing Philosophy and Principles


- Greater certainty of earnings v/s. mere quantum of earnings growth
- Superior and consistent quality of earnings v/s. mere quantum of earnings growth
- High quality at a reasonable price v/s. inferior quality at an arithmetically 'cheap' price

Investment Approach

- Concentrated investment approach of 20-25* carefully identified businesses across range of market capitalization
- Focused portfolio of mid-sized businesses with a proven track record which could go on to become much larger thereby creating significant investment returns
- Buying businesses with a large competitive advantage & capital efficiency in industries with a large size of opportunity, that offer superior growth over long period of time
- Largely complementary portfolio to ASK Indian Entrepreneur Portfolio, ASK India Select Portfolio and ASK Growth Portfolio

Awards & Achievements

- In 2023, ASK Indian Entrepreneur Portfolio or ASK IEP PMS was awarded Rank #3 as the Best PMS across all categories , on a 10Y Risk-Adjusted Returns. These Awards were hosted by PMS AIF WORLD, in association with IIM-Ahmedabad.
- In 2021, ASK Indian Entrepreneur Portfolio or ASK IEP PMS was awarded Rank #2 as the Best PMS across all categories , on a 10Y Risk-Adjusted Returns. These Awards were hosted by PMS AIF WORLD, in association with IIM-Ahmedabad.
- In 2021, ASK Indian Entrepreneur Portfolio or ASK IEP PMS was awarded Rank #2 as the Best PMS across all categories , on a 5Y Risk-Adjusted Returns. These Awards were hosted by PMS AIF WORLD, in association with IIM-Ahmedabad.

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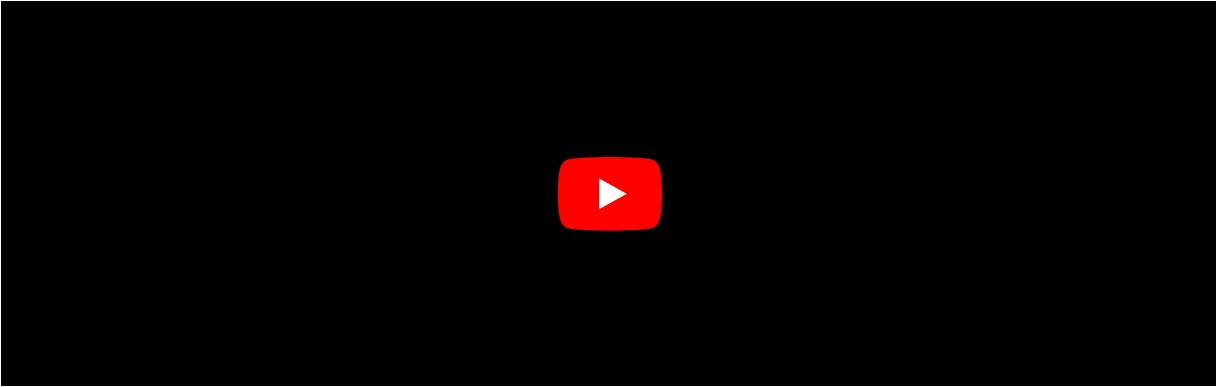


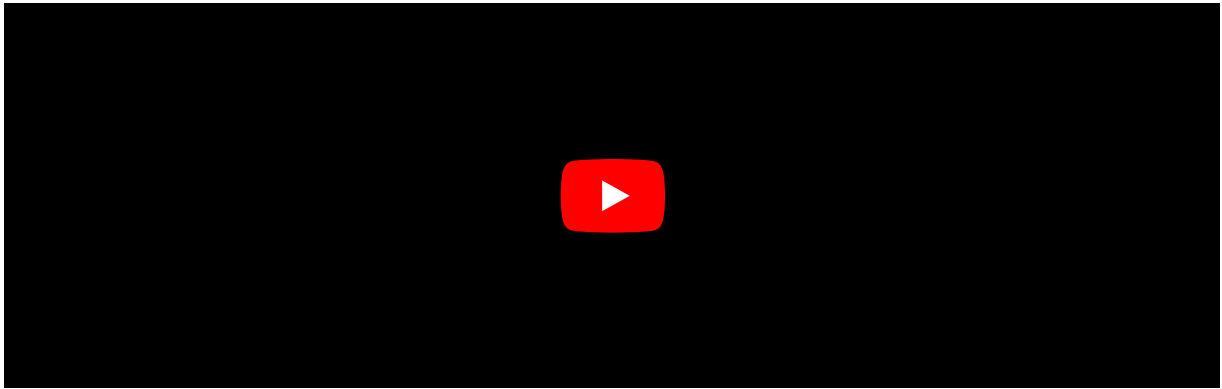
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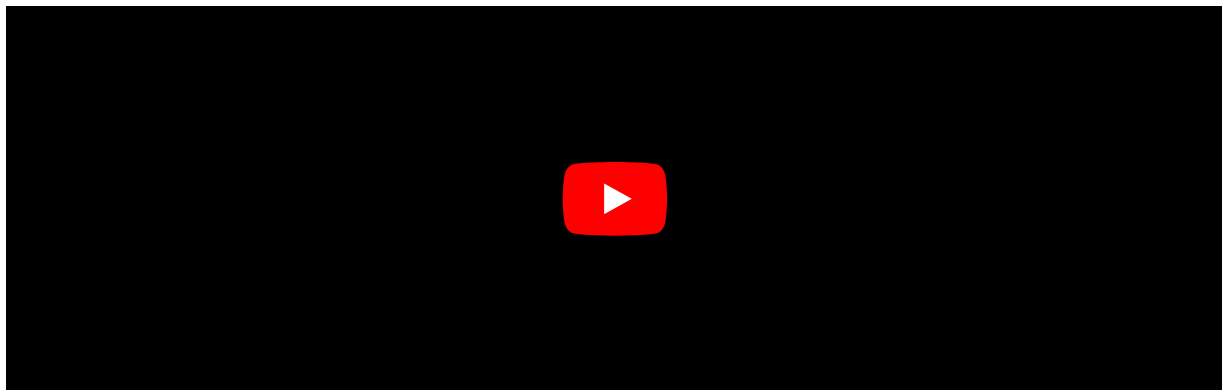
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