



AlfAccurate Advisors India Opportunity Plan (AAA IOP) PMS

KEY PORTFOLIO ATTRIBUTES

ABOUT ALFACCURATE ADVISORS PMS PORTFOLIO

Tough situations need tougher solutions. That's the underlying philosophy for every portfolio that is managed by AAA. Given the dynamic business ecosystem, their approach to managing a portfolio is robust and, proactive rather than reactive. Their expertise ensures convenience and competitive returns as advisors work hard to generate returns for the investors based on vast domain knowledge and a process-driven approach. An integrated, long-term and analysis-based approach is applied to every client portfolio.

KEY PEOPLE



(https://www.pmsaifworld.com/team_mf/rajesh-kothari/)

Dr. Rajesh Kothari
Founder & MD,
AlfAccurate
Advisors

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Investment Objective

The investment objective of AlfAccurate Advisors India Opportunity Plan or AAA IOP PMS is to invest in listed companies with a combination of high growth stocks as well as value stocks. The primary focus is on capital protection with an aim to deliver attractive long term returns using disciplined, fundamental, research-driven approach.

AAA India Opportunity Plan (IOP) PMS plan is a portfolio of 40-60 companies which are market leaders with strong corporate governance and high growth potential with investment horizon of 3-5 years.

Investment Strategy

The investment strategy of AlfAccurate Advisors India Opportunity Plan or AAA IOP PMS can be laid out in the following parameters:

Investment Universe

- Diversification across industries
- Diversification across M-cap with focus on liquidity:
- Min 40% in large cap INR275 bn+
- Not more than 10% in one stock
- Max 35% in one sector
- Max 50% in the top 10 stocks
- Minimum investments in 30 stocks

Flexible investment style

Growth as well as Value with focus on Margin of Safety

Staggered Approach

- Portfolio exposure increased over a period
- Not averse to raise cash

Exit Strategy

- Close eye on earnings growth drivers
- Close eye on valuations
- Continuous monitoring of risk

Investment Attributes

Resilient Growth

The fundamental point here is to make sure that investing is focused on long-term wealth creation that is resilient to market ups & downs.

AlfAccurate Advisors invest in companies with superior earnings growth, driven by sustainable competitive advantage. They believe that in the long term, the market is a mirror of earnings growth and hence, consistent earnings growth is the primary drive of intrinsic value and stock price appreciation; thus, they focus on companies that have proven management teams, operating in a good growth market with a strong product portfolio.

Their strong leadership, focus on building a healthy, balanced portfolio of market-competing and market-creating strategic moves, innovation and agility gives companies a durable competitive advantage. That translates in producing resilient earnings growth, which when compounded, can deliver tremendous value to shareholders.

Resilient Fundamentals

The fundamental point here is to make sure that investing is biased towards companies with strong fundamentals that are resilient to economic shocks.

No one can influence the macroeconomic environment, but one must aim to ensure that the stocks held are the most resilient we can find. Guided by their 3M approach, AlfAccurate Advisors' investment team focuses on selecting companies that have demonstrated strong business performance as evidenced by superior Return on Equity (ROE) and steady cash flows over the long term.

The aim is to invest in companies that possess sustainable competitive advantages, creating value as a profitable business that can, over time, provide attractive returns with less risk than the overall market.

Resilient Risk Management

The intent here is to ride the waves of volatility in a balanced manner.

Operational, technology and environmental stressors are nothing new in the investment world. What we are now seeing, however, is a higher frequency of failure, in tandem with the greater likelihood of a catastrophic incident. In response to these threats, the role of a risk-adjusted investment strategy as a line of defence requires a bedrock of radical resilience.

The key focus on diversification and a disciplined exit strategy helps them navigate uncharted waters such that we inherently mitigate market risks. Their strategy to respond quickly to change, helps to protect investors' capital from market shocks and generate wealth over the long-term.

Investment Philosophy

The investment philosophy at AlfAccurate Advisors is to make high-conviction investments in companies with strong moats and high growth potential that offer solid long-term, risk-adjusted returns for

investors.

AAA or AlfAccurate Advisor's proprietary 3M approach has delivered superior risk-adjusted returns year after year and resulted in various multi-baggers such as Hitachi, Motherson Sumi and Whirlpool over the past 11 years. They invest in companies that have proven management, a strong balance sheet, superior earnings growth and exceptional corporate governance. Their radically resilient strategy is in accordance with this 3M approach of Market Size, Market Share, and Margin of Safety.

- Market Size:

Market size determines the size of the opportunity. They prefer companies that are targeting a large market size to generate exponential returns.

- Market Share:

They buy companies that are the leaders in their sector as they are the best positioned to navigate the upturn and downturn of the economy.

- Margin of Safety:

Price is what you pay. Value is what you get. They buy the companies which are available at reasonable valuations.

Investment Process

AAA or AlfAccurate Advisors follow a 4-step investment process:

Stock Identification

- Identify emerging trends and opportunities from a universe of 600 companies
- Filter approach – using variety of valuation parameters
- Focus on earnings, free cash flow, ROE, long term growth and profitability trends

Analysis & Decision making Process

- Initial screening
- Corporate meeting and detailed due diligence
- Identify sustainable competitive advantage

Portfolio Construction Monitoring & Nurturing

- Combination of Top Down and Bottom Up approach with a benchmark agnostic strategy to achieve Long term investment objective

- Continuous portfolio monitoring ensures prudent risk management
- Regular interaction to provide strategic inputs to strengthen systems, controls and CG in line with best practices

Exiting & Realizing Value

- Constant evaluation of valuation metrics to decide optimum return potential
- Intrinsic value V/s Current Market Price to evaluate Margin of Safety
- Change in underlying assumptions of investment thesis.

AAA invests in companies that have proven management with superior earnings growth, driven by sustainable competitive advantage.

AlfAccurate Advisors believe that in the long term, the market is a mirror of earnings growth and hence, consistent earnings growth is the primary driver of intrinsic value and stock price appreciation. That translates into producing resilient earnings growth, which when compounded, can deliver wealth creation for investors.

AAA's key focus on diversification and a disciplined exit strategy help them navigate uncharted waters such that we inherently mitigate market risks.

Their strategy is to respond quickly to change, help to protect your capital from market shocks and generate wealth over the long-term.

The team at AlfAccurate Advisors is committed to using a disciplined, fundamental, research-driven approach to identify well managed, shareholder-friendly companies with sound business models where they see a strong likelihood of continuing profitability and positive shareholder returns.

Their unique 4-Step Investment Process is predicated on 3M stock selection, prudent risk management and a disciplined exit strategy.

AlfAccurate Advisors' PMS Positioning


AlfAccurate Advisors is driven by a strong commitment to protect capital and create wealth for its clientele. It places paramount importance on meeting investors' expectations, recognizing that generating superior returns is only one part of the equation. Investors also seek peace of mind amid market volatility. Hence, it aims to deliver consistent performance, instilling trust and confidence in its clients by safeguarding their hard-earned money". The firm's founders, including Rajesh Kothari, are actively involved as fund managers,

ensuring consistency and stability in its investment approach. With Rajesh Kothari's 27-plus years of experience in the Indian capital markets and a combined team experience of 75-plus years in Indian equity markets,

1. AlfAccurate Advisors possesses valuable insights into business cycles, sectors' growth patterns, and varying valuation cycles.
2. AlfAccurate Advisors' investment philosophy centers on 'QuAgility', a term coining 'Quality plus Investment plus Agility'. This principle ensures a meticulous selection of market-leading businesses supported by robust management, governance, and financials.
3. Additionally, AlfAccurate Advisors maintains a disciplined exit strategy, ensuring a balance between valuation and growth considerations. This approach aligns with its overarching mission to protect capital while creating wealth for investors. Looking to the future, the firm envisions becoming the world's most admired investment advisor, guided by a mission to deliver long-term superior risk-adjusted returns while offering a wow experience to all stakeholders.
4. AlfAccurate Advisors remains committed to offering a concise range of quality products that genuinely meet investors' needs and aspirations.

Awards & Achievements

- In 2023, AlfAccurate Advisors India Opportunities Portfolio or AAA IOP 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, AlfAccurate Advisors India Opportunities Portfolio or AAA IOP 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.
- AlfAccurate Advisors have won the Best PMS Provider – India Award by APAC Insider Business Awards.

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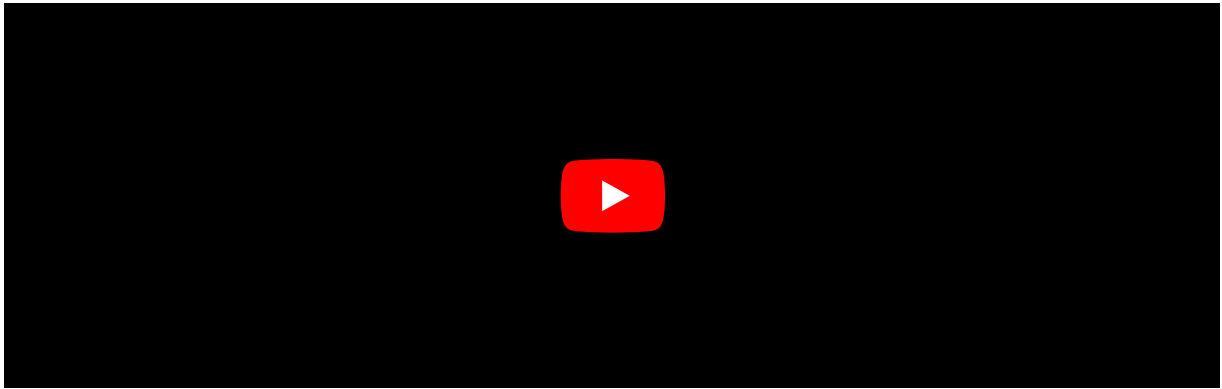


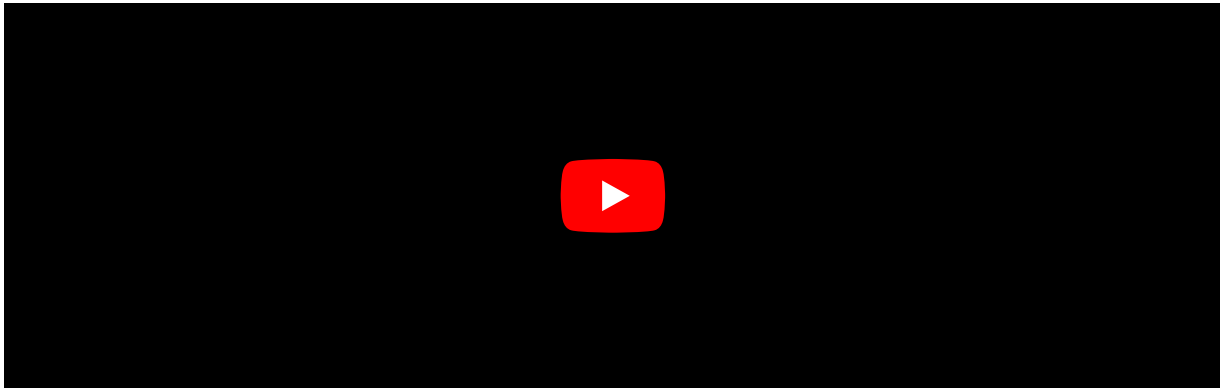


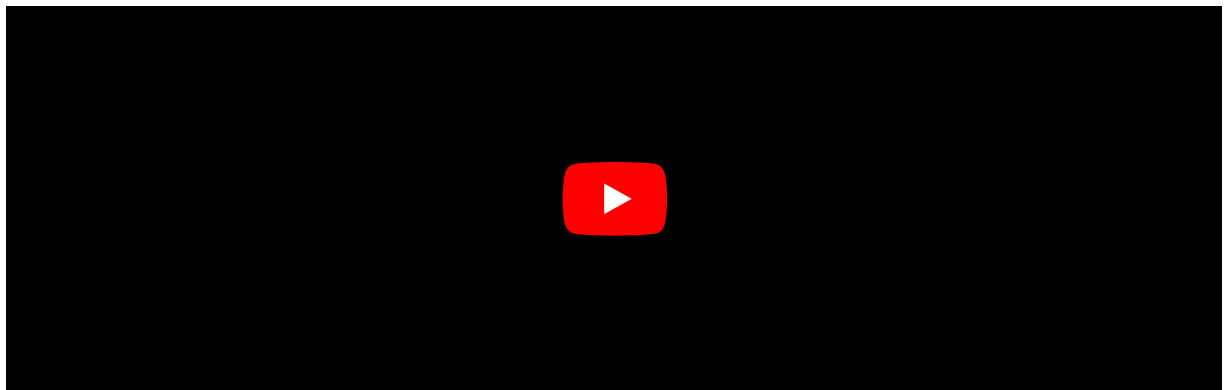
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High-Performance Investing

PMS AIF WORLD is a New Age Investment Services Company, providing analytics-backed good quality investing service experience with an endeavor and promise for wealth creation and prosperity. Over 5+ years, we have been managing 500+ UHNI & NRI families, across 1000 CR+ assets. We are very selective in our approach, and analyze products across 5 Ps – People, Philosophy, Performance, Portfolio, and Price with an endeavor to ascertain the Quality, Risk, and Consistency (QRC) attributes before suggesting the same to investors.

We offer responsible, long term investment service. Invest with us in the best quality products and make informed investment decisions.

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