Negen Capital Special Situations & Technology Fund

KEY PORTFOLIO ATTRIBUTES

About Negen Capital

Negen Capital PMS was launched in November 2017. They are predominantly a smallcap and midcap focused PMS with a keen interest in identifying value investing opportunities via special situations like demergers and Spin offs.

Key People

(https://www.pmsaifworld.com/team_mf/sunil-singhania/)

Neil Bahal
Founder

Investment Objective

Negen Capital's Special Situations & Technology Fund is predominantly a smallcap and midcap focused PMS with a keen interest in identifying value investing opportunities via special situations like demergers and Spin offs.

The objective of Negen Capital Special Situations PMS is to create consistent profits for clients in all market conditions, through values of professionalism, transparency, and safety.

The belief is to aim at Sustainable Value Creation Via Growth Investing & Special Situation Investing.

Investment Strategy

Negen Capital Special Situations PMS follows the below mentioned investment strategies:

- Strategic risk management:

1. Negen Capital has been following a conservative approach due to covid, which means company has been keeping cash as well for the uncertainties, the company has kept 4.19% cash and generated alpha returns with 95.81% Investment.
2. Negen Capital takes less risk by avoiding cyclicals, commodities and PSUs.
3. Negen Capital sticks to Technology, IT, Demergers and Promoter change.

- Negen Capital Special Situations is uniquely placed:

1. Special Situations: Value investing with a trigger
    1. Demergers
    2. Change in promoters
2. Technology: A permanent super-cycle
    1. Indian Tech
    2. Global Tech (FAANG plus)

- Negen Capital Special Situations PMS is Tech-focused:

1. The internet adds 3 new users EVERY SECOND.
2. 15 smartphones are sold globally EVERY SECOND
3. Due to Jio, India has seen 'Internet-i-fication'.
4. We are in the midst of an early technology revolution in India
5. A technology super cycle is in front of our eyes
6. Every single decent sized business is going to upgrade its IT infrastructure in the next few years
7. Pure technology platforms and even the IT product & services companies should see unprecedented, structural growth.
8. These companies are typically debt free, have high RoIC, high FCF, and best of all,

they have Growth.

- Value Investing:

1. Negen PMS does not buy random, cheap stocks from market. These kinds of stocks are cheap for good reasons.
2. Negen PMS buys buy Cheap stocks only if they demerge or if a new promoter buys the company to create value

Investment Approach

1. Idea Generation: Most of Negen Capital PMSs portfolio companies have a unique combination of Special Situation Investing. They look for ideas from Demerger and Promoter Change with Better Management. These situations have delivered Alpha Returns.
2. MEGA Trends: Negen Capital PMS identify Mega Trends and Invest the companies benefitting the most from them. They have been Investing in Consumer Tech Companies and being Early in this, have generated Alpha returns.
3. Conservative Approach: The team at Negen Capital PMS aims to stay away from PSU and Cyclical Investments.

Investment Philosophy

Investment Mindset of the Fund

- Growth + Value (Special Situations like Demergers & Delisting)

- Future Ready Businesses
- Importance to position sizing
- After all, the big money is made in Quality businesses only

Future Ready Businesses – Technology at The Fore

- Change is here. It is here at maximum velocity.
- Way of doing things is changing across the board
- Profit pools are shifting at an alarming pace from Traditional
- Businesses to Technology led Business Platforms
- H ence invest accordingly and pay respect to change and avoid old

world 'value traps'

• At Negen, they are closely trying to keep pace with innovation and try best to invest early in 'Future Ready Platform Businesses'

Portfolio Refreshing

• H abit of refreshing the portfolio regularly so that it is never stuck in 'value traps' – stocks who's time has long gone but investors feel it is cheap and good

Example: Covid made a lot of industries irrelevant while also created big opportunities for many industries. One of the big reasons for our big gains in June-August 2020 period is because we were quick to "Refresh" the portfolio and made it relevant to today's realities.

Unlisted pre-IPO opportunities

Awards & Achievements

In 2022, Negen Capital Special Situations & Technology Fund was awarded Rank#1 in the Best PMS across all Categories, on 1Y of Risk-Adjusted Returns. These Awards were hosted by PMS AIF WORLD, in association with IIM-Ahmedabad.

(https://www.pmsaifworld.com/what-is-qrc)

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Negen Undiscovered Value Fund – Category III AIF
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