

ICICI Prudential PMS Contra Strategy

KEY PORTFOLIO ATTRIBUTES

ABOUT ICICI PRUDENTIAL PMS

ICICI Prudential Portfolio Management Services (PMS) (<https://www.iciciprups.com/>) enjoys a rich parentage of two large organizations ICICI Bank Ltd which is India's largest private sector bank in addition to being one of the most trusted brands in financial services and Prudential Plc UK, an international financial services company, with significant operations in Asia, US and UK. ICICI Prudential PMS offers multiple portfolio options to cater to varied types of investor needs.

KEY PEOPLE



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CIO,
Alternates

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Geetika Gupta
Fund Manager

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(https://www.pmsaifworld.com/team_mf/anand-sharma/)

Anand Sharma
Portfolio
Manager

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Investment Objective

ICICI Prudential PMS Contra Strategy aims to provide long term capital appreciation and generate returns by investing in underperforming stocks or sectors, which are available at intrinsic valuations and are expected to perform well in the long run. It seeks to generate capital appreciation by investing predominantly in Equity & Equity Related Instruments through contrarian investing. For defensive consideration, the Strategy may invest in debt and money market mutual fund schemes.

ICICI Prudential PMS Contra Strategy aims to identify tomorrow's leaders by picking businesses that are benefitting from both earnings growth and P/E rating.

Investment Strategy

As the name suggests, the core motive of ICICI Prudential PMS Contra Strategy is to follow a contrarian approach to investing.

High Entry Barriers

- Businesses going through Unfavourable Business Cycle
- Competent players
- Survivors within the sectors

Industry Consolidation

- Industry challenges lead to reduction in players
- Distress exit of one, can lead to growth for another

Special Situations

- Mergers & Acquisitions
- Changes in subsidiary holdings
- Spin-offs in products or departments

Investment Framework

The core belief of ICICI Prudential PMS Contra Strategy is that Companies create wealth, not markets.

The investment framework of ICICI Prudential PMS Contra Strategy is to identify prominent businesses at reasonable valuations, which have competent management.

Prominent Businesses

- Company growing faster than industry & industry faster than market
- Qualitative assessment based on the concept of economic moats
- Foreseeable changes in business leading to a positive outcome

Reasonable Valuations

- Cash flow is central in our Investment Process about a company's value
- Evaluation of margin of safety required according to the 'moat' and competence of management

- Better risk reward profile

Competent Management

- Focused on growth, improving margins & prudent capital allocation
- Competent managers with a credible track record
- Fair corporate governance standards, with aligned shareholder interests

Investment Philosophy

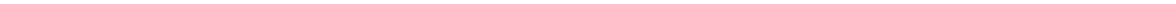
- A focused portfolio of investment ideas, agnostic to market capitalisations. ICICI Prudential PMS Contra Strategy aims to invest across market capitalisation.
- Optimal diversification across stocks, with the opportunity to be overweight vis-à-vis its benchmark, S&P BSE 200, on certain high conviction picks, to potentially generate higher alpha.
- In case of debt exposures, ICICI Prudential PMS Contra Strategy may invest in debt instruments through money market/liquid/short term mutual fund schemes of ICICI Prudential Mutual Fund.
- ICICI Prudential PMS Contra Strategy may not be restricted by any particular investment style and may opt for flexibility to select stocks across investment styles.
- ICICI Prudential PMS Contra Strategy may aim to use cash as a hedge against sharp declines in equity in an endeavour to protect the Strategy.
- ICICI Prudential PMS Contra Strategy aims to identify sectors or companies which are facing temporary headwinds
- ICICI Prudential PMS Contra Strategy aims to build a concentrated portfolio of high conviction ideas

Awards & Achievements

- In 2023, ICICI Prudential PMS Contra Strategy was awarded as the Best PMS across all categories , on a 1Y Risk-Adjusted Returns. These Awards were hosted by PMS AIF WORLD, in association with IIM-Ahmedabad.

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ICICI Prudential Equity

ICICI Prudential Enhanced

ICICI Prudential Equity

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II- Category III AIF

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Dynamic Equity Fund –
CATEGORY III AIF

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Opportunities Fund-
Category III AIF

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ICICI PRUDENTIAL Long
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