

Sundaram Alternates' PACE Portfolio

KEY PORTFOLIO ATTRIBUTES

ABOUT SUNDARAM ALTERNATE ASSETS

Sundaram Alternate Assets Ltd. (SA) is a wholly-owned subsidiary of Sundaram Asset Management Company Limited (SAMC), that caters to investment needs of high net-worth individuals (HNIs). SAMC is a wholly-owned subsidiary of Sundaram Finance Limited, a leading non-banking finance company in India. Sundaram Portfolio Managers (SPM) and Sundaram Alternative Investment Funds (AIFs) are the divisions under the SA umbrella. Built on a foundation of trust, Sundaram Alternates tailors solutions to help

KEY PEOPLE



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

Mr. Madanagopal Ramu
Fund Manager

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Investment Objective

The objective of Sundaram Alternates' PACE Portfolio is to seek long term capital growth by investing in a diversified portfolio of companies.

Investment Philosophy

Sundaram Alternates' PACE Portfolio follows a CORE and a Satellite approach to portfolio management. PACE strategy is for investors who seek a blended approach between value and growth within a portfolio.

Sundaram Alternates' PACE PMS is a portfolio with a maximum of 25 stocks that invests across cap curves targeting companies with sustainable competitive advantages and reasonable valuation.

Investment Strategy

Sundaram Alternates' PACE Portfolio follows the 3Q Quality Approach to Stock Selection:

Quality of Business

- Scalability: How big is the opportunity?
- Self Sustaining business models: 3Q Financial framework
- Strong differentiating factors in business: What is the key competitive advantage to sustain the growth over long term?, and is it cost competitive, a superior brand leading to higher pricing power or pure execution?

Quality of Financials

- Ability to double earnings in 4-5 years
- $\text{Growth} = \text{Reinvested Cash} \times \text{RoIC}$
- Biz. with min RoIC of 15%
- Higher cash generation to lead to higher reinvestment
- Debt to Equity should be $<0.5x$ as low debt helps businesses navigate tough times

Quality of Management

- Past execution track record
- Vision of management
- Focus on high sustainable growth
- Past record of identifying and investing in profitable opportunities
- Good corporate governance track record
- Visionary
- Problem solving


Sundaram Alternates' Niche

- Strong Track Record
- Low Churn
- Time Tested Stock Selection

- Reach Across Country
- Transparency
- Strict Adherence to Risk Guidelines
- Shared Research Capabilities

Awards & Achievements - Across Sundaram Alternates' PMSs & AIFs

- In 2023, Sundaram Alternates' High Yield Secured Debt Fund – II won the Investors Choice Award for the Best CAT II AIF in the Private Credit Space. These Awards were hosted by PMS AIF WORLD, in association with IIM-Ahmedabad.
- In 2021, Sundaram Alternates' Emerging Leadership Fund (SELF) Portfolio was awarded Rank #2 as the Best PMS in the Mid & Small Cap Category , on a 3Y 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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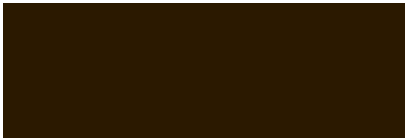
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Sundaram Alternates
Voyager Portfolio

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Leadership Fund (SELF)
Portfolio

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Sundaram India Secular
Opportunities Portfolio
(SISOP PMS)

(<https://www.pmsaifworld.com/portfolio/sundaram-india-secular-opportunities-portfolio-sisop/>)

Sundaram Alternates'
Emerging Corporate Credit
Opportunities Fund (ECCO)
– 1 | CAT II AIF

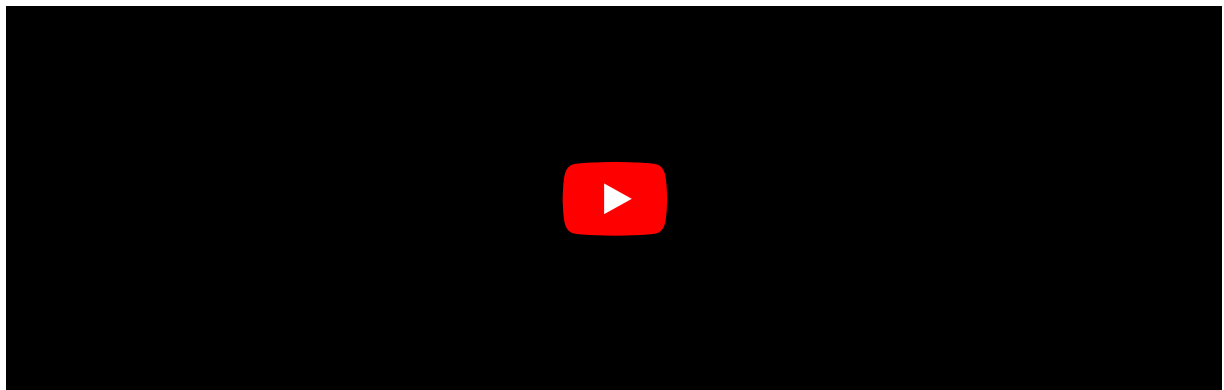
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Sundaram Alternative
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SUNDARAM Alternative Opportunities Series – High Yield Secured Debt Fund – II

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