

# ASK Investment Managers – Growth Portfolio

## KEY PORTFOLIO ATTRIBUTES #


## ABOUT ASK INVESTMENT MANAGERS PMS

ASK Investment Managers Limited (ASK IM) stands as a prominent asset and wealth management company, with its primary focus on serving the High Net Worth Individual (HNI) and Ultra High Net Worth Individual (UHNI) segments within the Indian market. ASKIM holds the distinction of being among the first companies to secure a Portfolio Management Services license in India and is presently one of the leading providers of Discretionary Equity Portfolio Management Services. Their investment focus is exclusively directed towards

## KEY PEOPLE



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Mr. Bharat Shah  
Executive Director

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

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### Investment Objective

ASK Growth Portfolio is one of the industry's first PMS Investment Approach launched way back in Jan 2001.

ASK Growth Portfolio is designed to provide medium to long-term returns, by seeking to buy growth at value prices from a diversified portfolio of Indian equities with favorable long term prospects. This portfolio is an ideal investment for investors who would like to participate in India's growth opportunity.

The two core objectives of this ASK Growth Portfolio 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 Growth Portfolio 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

The core philosophy of ASK Growth PMS at ASK Investment Managers centers on two fundamental principles: prioritizing capital protection over time, followed by capital appreciation. Their investment strategy involves selecting Indian equities associated with high-quality businesses led by exceptional management teams, exhibiting sustained long-term growth potential at reasonable and equitable valuations.

Underpinning their investing philosophy are the following overarching principles:

1. Emphasis on greater certainty of earnings as opposed to solely focusing on the magnitude of earnings growth.
2. A preference for superior and consistent quality of earnings rather than just the quantity of earnings growth.
3. Prioritizing high quality at a reasonable price rather than settling for inferior quality at a superficially 'cheap' price.

Their investment approach is characterized by:

1. Valuing the intrinsic worth of assets rather than merely assessing the current market price.
2. A disciplined strategy of investing in outstanding businesses.
3. Building a portfolio that capitalizes on compounding opportunities.
4. Purchasing 'growth' businesses at 'value' prices.

Their approach revolves around selecting high-quality businesses at fair valuations, eschewing the acquisition of mediocre enterprises at low prices. Additionally, their Key Investment Attributes contribute to shaping investment strategies with well-defined objectives and distinct characteristics.

#### Investment Strategy

ASK Growth Portfolio aims to build a portfolio of investments predominantly into businesses representing a large size of opportunity. The investment approach of 20 businesses is into high quality businesses with superior management pedigree- Businesses with high ROCE (> 25%) with superior future earnings growth (> 15%) at the time of 1st purchase of stock. Apart from this, the four key investment attributes are: Size of the opportunity, Quality of business, Earnings Growth, and Value. Good Management is an attribute which is a given constant.

#### Investment Approach

- Universe of Top 500 as per market capitalization

- Profit Before Tax (PBT) above INR 200 crs (\*at the time of 1st purchase of the stock) for trailing 4 quarters
- Subjective evaluation of management quality (integrity, vision, execution, capital allocation skills and capital distribution)
- Finally, an investment approach emerges of 20 businesses, representing an optimal blend of the overall characteristics, and adequate diversity, with a minimum Margin of Safety of 15%.
- Rigorous filters of minimum of 25% Return on Capital Employed (capital efficiency) and minimum of 15% Earnings Growth over the next 3 to 5 years

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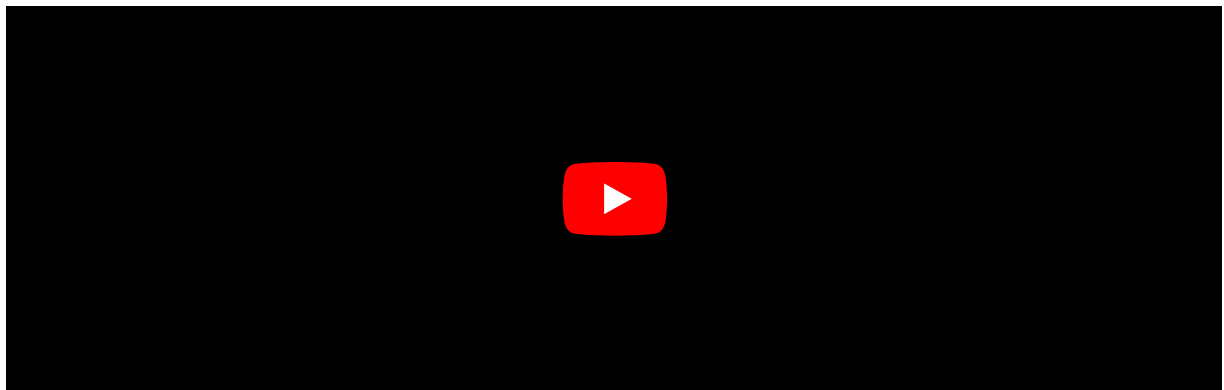
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We offer responsible, long term investment service. Invest with us in the best quality products and make informed investment decisions.

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