

# Valentis Rising Star Opportunity PMS

## KEY PORTFOLIO ATTRIBUTES #


## ABOUT VALENTIS ADVISORS

Valentis Advisors Pvt Ltd (formerly known as Veda Investment Managers Pvt Ltd) was founded by Jyotivardhan Jaipuria in 2015 after his 21 year stint with DSP Merrill Lynch to offer investment management services. They obtained a Portfolio Management Services (PMS) license from SEBI in 2016. Their core offering is discretionary PMS services but they also offer non-discretionary PMS and advisory services.

## KEY PEOPLE

Investment Objective

- The objective of the scheme is capital appreciation in the medium term to long term by investing in cherry picked stocks mostly in the Mid and Small cap space.
- The portfolio focuses primarily on a buy and hold strategy at most times.
- The focus is on the 3 Us (Under-owned, under-valued and undiscovered stocks)

#### Investment Philosophy

- Detailed research over gut feelings and market sentiments
- Process driven research to eliminate market noise – blend of science and art.
  1. Largely scientific process. This involves, screening to identify ideas and then detailed modelling to arrive at fair valuations.
  2. Bit of art involves looking at market sentiments and staying away from herd mentality.

#### Portfolio Strategy

They invest in companies that are at the inflexion point in growth. Their portfolio would be a mix of companies that are value plays and growth plays available at a reasonable price.







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- Marcellus Consistent Compounders Portfolio (Marcellus CCP PMS) (<https://www.pmsaifworld.com/portfolio/marcellus-consistent-compounders-pms/>)
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- Marcellus Rising Giants PMS (<https://www.pmsaifworld.com/portfolio/marcellus-rising-giants-pms/>)
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- Ampersand Growth Opportunities Fund Scheme (AGOFs-1) – CAT III AIF (<https://www.pmsaifworld.com/portfolio/ampersand-growth-opportunities-fund-scheme-agofs-1/>)

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