

Sundaram India Secular Opportunities Portfolio (SISOP PMS)

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

0 0 0 0 0

Investment Objective

The investment objective of Sundaram India Secular Opportunities Portfolio (SISOP PMS) is to generate capital appreciation across market cycles by investing in a concentrated set of high conviction stocks.

It is a concentrated portfolio of around 15 stocks, designed for investors seeking returns through investments in a concentrated portfolio of companies with sustainable competitive advantages and reasonable valuations.

Strategy Highlights

Sundaram India Secular Opportunities Portfolio (SISOP PMS)

Highlights:

- Concentrated portfolio of around 15 stocks
- Invest in select businesses with secular growth opportunities
- Filters based stock selection “3Q” Approach
- Mid and Small cap focus to bring in higher alpha
- 4x4 Wealth Multiplier Themes
- 7.4x wealth creation since inception (2011) [as of Feb 2023]

Investment Philosophy

Sundaram India Secular Opportunities Portfolio (SISOP PMS) attributes to the following themes:

India 2025 – Themes

- Financial inclusiveness
- Phygital Bluechips
- Consumption Czars
- Export Voyagers

Investment Strategy

Sundaram India Secular Opportunities Portfolio (SISOP PMS) looks to invest in secular growth opportunities across market caps with a long term orientation of portfolio building >3 years.

Sundaram India Secular Opportunities Portfolio (SISOP PMS) has the following screeners in place:

- Companies with growth opportunity > 15%
- Ability to generate > 15% ROIC
- Excellent cash flows from business
- Option to reinvest for growth
- Low D/E to sail through crisis situations and gain market share

Sundaram India Secular Opportunities Portfolio (SISOP PMS) 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
- Growth = Reinvested Cash x 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.

i (<https://www.pmsaifworld.com/what-is-grc>)

VIEW DETAILED QUALITY, RISK,
CONSISTENCY ANALYSIS

REGISTER NOW ([HTTPS://APP.PMSAIFWORLD.COM/REGISTER](https://app.pmsaifworld.com/register)) →

| | |
|--|--|
| | |
| | |
| | |
| | |
| | |
| | |

| | |
|--|--|
| | |
| | |
| | |
| | |
| | |
| | |

| | |
|--|--|
| | |
| | |

| | |
|--|--|
| | |
| | |
| | |
| | |





Sundaram Alternates Rising
Star PMS
(<https://www.pmsaifworld.com/p/rising-star/>)

Sundaram Alternates' PACE
Portfolio
(<https://www.pmsaifworld.com/p/pace-portfolio/>)

Sundaram Alternates
Voyager Portfolio
(<https://www.pmsaifworld.co/voyager-portfolio/>)

Sundaram Emerging
Leadership Fund (SELF)

Sundaram Alternates'
Emerging Corporate Credit

Sundaram Alternative
Opportunities Series – Atlas

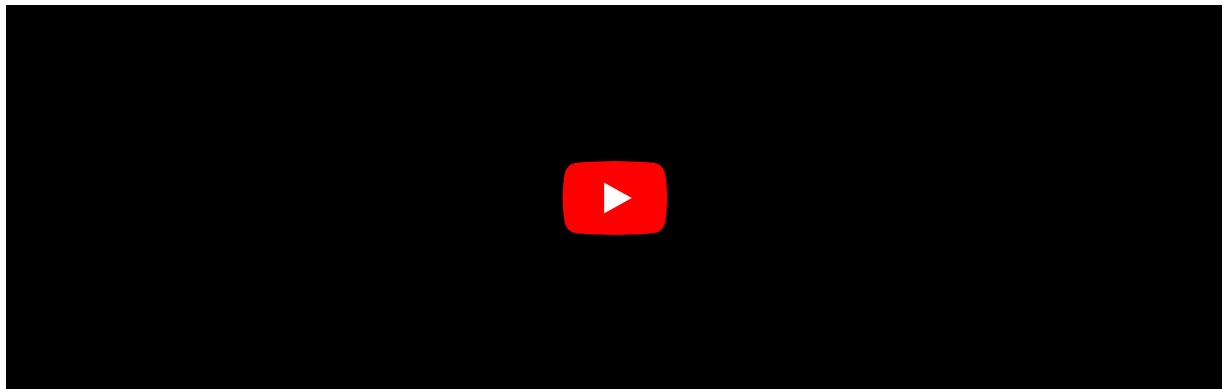
Portfolio
(<https://www.pmsaifworld.com/portfolio/emerging-leadership-fund-self/>)

Opportunities Fund (ECCO)
– 1 | CAT II AIF
(<https://www.pmsaifworld.com/portfolio/alternates-emerging-corporate-credit-opportunities-fund/>)

– CAT III AIF
(<https://www.pmsaifworld.com/portfolio/alternative-opportunities-series-atlas-cat-iii-aif/>)

SUNDARAM Alternative Opportunities Series – High Yield Secured Debt Fund – II
(<https://www.pmsaifworld.com/portfolio/sundaram-alternative-opportunities-series-high-yield-secured-debt-fund-ii/>)





>

(<https://www.pmsaifworld.com/blog/sundaram-alternates-emerging-corporate-credit-opportunities-fund-series-1-aif/>)

>

(<https://www.pmsaifworld.com/blog/investment-themes-by-sundaram-aif-to-multiply-wealth-over-next-4-years/>)

Subscribe To Our Newsletter

By PMS AIF WORLD • Over 30,000 Subscribers

Stay informed with our latest updates. Subscribe to our newsletter for exclusive content, news, and valuable insights.

Email

SUBSCRIBE

Portfolio Management Services

- Abakus All Cap Approach PMS (<https://www.pmsaifworld.com/portfolio/abakus-all-cap-growth-portfolio/>)
- Aequitas India Opportunities (<https://www.pmsaifworld.com/portfolio/aequitas-india-opportunities-pms/>)
- Ambit Coffee Can Portfolio (<https://www.pmsaifworld.com/portfolio/ambit-coffee-can/>)
- ASK Indian Entrepreneur Portfolio – IEP PMS (<https://www.pmsaifworld.com/portfolio/ask-investment-managers-indian-entrepreneur-portfolio-iep/>)
- AXIS Brand Equity PMS (<https://www.pmsaifworld.com/portfolio/axis-brand-equity/>)
- Basant Maheshwari PMS (<https://www.pmsaifworld.com/portfolio/basant-maheshwari-pms/>)
- Buoyant Capital Opportunities Multi-Cap Fund (<https://www.pmsaifworld.com/portfolio/buoyant-capital-opportunities-multi-cap-fund/>)
- Carnelian “The Shift” Strategy (<https://www.pmsaifworld.com/portfolio/carnelian-the-shift-strategy/>)
- Green Lantern Capital Growth PMS (<https://www.pmsaifworld.com/portfolio/green-lantern-capital-growth-pms/>)
- Helios India Rising PMS (<https://www.pmsaifworld.com/portfolio/helios-india-rising-pms/>)
- ICICI Prudential PMS Contra Strategy (<https://www.pmsaifworld.com/portfolio/icici-prudential-contra-strategy-pms/>)
- ICICI Prudential PMS PIPE Strategy (<https://www.pmsaifworld.com/portfolio/icici-prudential-pms-pipe-strategy-pms/>)
- ICICI Prudential PMS Value Strategy (<https://www.pmsaifworld.com/portfolio/icici-prudential-value-strategy-pms/>)
- Invasset Growth Fund PMS (<https://www.pmsaifworld.com/portfolio/invasset-llp-growth-fund-pms/>)
- Marcellus Consistent Compounders Portfolio (Marcellus CCP PMS) (<https://www.pmsaifworld.com/portfolio/marcellus-consistent-compounders-pms/>)
- Marcellus Little Champs PMS Portfolio (LCP) (<https://www.pmsaifworld.com/portfolio/marcellus-little-champs/>)
- Marcellus Rising Giants PMS (<https://www.pmsaifworld.com/portfolio/marcellus-rising-giants-pms/>)
- MOTILAL OSWAL Next Trillion Dollar Opportunity (NTDOP) (<https://www.pmsaifworld.com/portfolio/motilal-oswal-ntdop/>)
- Motilal Oswal Value Strategy PMS (<https://www.pmsaifworld.com/portfolio/motilal-oswal-value-pms/>)
- Sameeksha Capital Equity PMS (<https://www.pmsaifworld.com/portfolio/sameeksha-capital-equity-pms/>)
- Stallion Asset Core Fund Portfolio (<https://www.pmsaifworld.com/portfolio/stallion-asset-pms/>)
- UNIFI Capital Blended Rangoli PMS Portfolio (<https://www.pmsaifworld.com/portfolio/unifi-capital-pvt-ltd-blended-rangoli-pms/>)
- ValueQuest Growth Scheme PMS (<https://www.pmsaifworld.com/portfolio/valuequest-investment-advisors-growth-scheme-pms/>)

[View All PMS Products \(https://www.pmsaifworld.com/investments/\)](https://www.pmsaifworld.com/investments/)

Alternative Investment Funds

- Abakkus Diversified Alpha Fund – Category III AIF (<https://www.pmsaifworld.com/portfolio/abakkus-diversified-alpha-fund-category-iii-aif/>)
- Abakkus Emerging Opportunities Fund- I Category III AIF (<https://www.pmsaifworld.com/portfolio/abakkus-emerging-opportunities-fund-i-category-iii-aif/>)
- Alta Cura AI Absolute Return Fund – Category III AIF (<https://www.pmsaifworld.com/portfolio/alta-cura-ai-absolute-return-fund-category-iii-aif/>)
- Ampersand Growth Opportunities Fund Scheme (AGOFs-1) – CAT III AIF (<https://www.pmsaifworld.com/portfolio/ampersand-growth-opportunities-fund-scheme-agofs-1/>)
- Chanakya Opportunities Fund – I, Cat II AIF (<https://www.pmsaifworld.com/portfolio/chanakya-opportunities-fund-i-cat-ii-aif/>)
- ICICI Prudential Enhanced Dynamic Equity Fund – CATEGORY III AIF (<https://www.pmsaifworld.com/portfolio/icici-prudential-enhanced-dynamic-equity-fund-category-iii-aif/>)
- ICICI Prudential Equity Opportunities Fund- Category III AIF (<https://www.pmsaifworld.com/portfolio/icici-prudential-equity-opportunities-fund-category-iii-aif/>)
- ICICI PRUDENTIAL Long Short Fund – Series I – Category III AIF (<https://www.pmsaifworld.com/portfolio/icici-prudential-long-short-fund-series-i-category-iii-aif/>)
- ITI Long Short Equity Fund (<https://www.pmsaifworld.com/portfolio/iti-long-short-equity-fund/>)
- Pantomath AIF sponsored Bharat Value Fund – Cat II AIF (<https://www.pmsaifworld.com/portfolio/pantomath-aif-sponsored-bharat-value-fund-cat-ii-aif/>)
- Prudent Equity ACE Fund- Long Only Category III AIF (<https://www.pmsaifworld.com/portfolio/prudent-equity-ace-fund-long-only-category-iii-aif/>)
- Sameeksha Capital Investment Fund – Category III AIF (<https://www.pmsaifworld.com/portfolio/sameeksha-capital-investment-fund-category-iii-aif/>)
- Sameeksha India Fund (IFSC AIF) – GIFT CITY Domiciled Cat III Long Only AIF (<https://www.pmsaifworld.com/portfolio/sameeksha-india-fund-ifsc-aif-gift-city-domiciled-cat-iii-long-only-aif/>)
- TATA Absolute Return Fund- Category III AIF (<https://www.pmsaifworld.com/portfolio/tata-absolute-return-fund-category-iii-aif/>)
- TATA Equity Plus Absolute Return Fund – Category III AIF (<https://www.pmsaifworld.com/portfolio/tata-equity-plus-absolute-return-fund-category-iii-aif/>)
- True Beacon Global – Category III AIF (<https://www.pmsaifworld.com/portfolio/true-beacon-global-category-iii-aif/>)
- True Beacon One – Category III AIF (<https://www.pmsaifworld.com/portfolio/true-beacon-one-category-iii-aif/>)
- Unifi Rangoli India Fund – GIFT City domiciled Category III AIF (<https://www.pmsaifworld.com/portfolio/unifi-rangoli-india-fund-gift-city-domiciled-category-iii-aif/>)
- Xponentia Opportunities Fund – Cat II AIF (<https://www.pmsaifworld.com/portfolio/xponentia-opportunities-fund-cat-ii-aif/>)

[View All AIF Products \(https://www.pmsaifworld.com/investments/\)](https://www.pmsaifworld.com/investments/)

Introduction

[Home \(https://www.pmsaifworld.com/\)](https://www.pmsaifworld.com/)

[Investment Philosophy \(https://www.pmsaifworld.com/investment-philosophy/\)](https://www.pmsaifworld.com/investment-philosophy/)

[About Us \(https://www.pmsaifworld.com/about-us/\)](https://www.pmsaifworld.com/about-us/)

[Alternative Investment Funds \(AIFs\) \(https://www.pmsaifworld.com/what-are-alternative-investment-funds-aif/\)](https://www.pmsaifworld.com/what-are-alternative-investment-funds-aif/)

[Portfolio Management Services \(PMS\) \(https://www.pmsaifworld.com/what-are-portfolio-management-services-in-india/\)](https://www.pmsaifworld.com/what-are-portfolio-management-services-in-india/)

[NRI – Invest In India \(https://www.pmsaifworld.com/pms-for-nri/\)](https://www.pmsaifworld.com/pms-for-nri/)

[In the News \(https://www.pmsaifworld.com/in-the-news/\)](https://www.pmsaifworld.com/in-the-news/)

[Client Testimonial \(https://www.pmsaifworld.com/pms-aif-reviews/\)](https://www.pmsaifworld.com/pms-aif-reviews/)

Content & Analysis

[Articles \(https://www.pmsaifworld.com/blogs/\)](https://www.pmsaifworld.com/blogs/)

[Videos | Webinars | Expert Talks \(https://www.pmsaifworld.com/crystal-gazing-next-decade-of-wealth-creation-for-investors-year-2020-2030/\)](https://www.pmsaifworld.com/crystal-gazing-next-decade-of-wealth-creation-for-investors-year-2020-2030/)

[PMS Performance Newsletter \(https://www.pmsaifworld.com/pms-performance-newsletter/\)](https://www.pmsaifworld.com/pms-performance-newsletter/)

AIF Performance Newsletter (<https://www.pmsaifworld.com/aif-performance-newsletter/>)
INVESTONOMICS – Quarterly Newsletter (<https://www.pmsaifworld.com/newsletter/>)
QRC Reports (<https://www.pmsaifworld.com/category/qrc-reports/>)
PMS AIF SPECIAL REPORTS (<https://www.pmsaifworld.com/category/pms-aif-special-reports/>)

For Investors

PMS Selector (<https://www.pmsaifworld.com/what-pms-is-best-for-you-pms-selector-tool/>)
PMS Return (<https://www.pmsaifworld.com/latestpmsreturns/>)
AIF Returns (<https://www.pmsaifworld.com/aif-return-comparison/>)
Our Difference (<https://www.pmsaifworld.com/our-difference/>)
Investsense Webinar (<https://www.pmsaifworld.com/crystal-gazing-next-decade-of-wealth-creation-for-investors-year-2020-2030/>)
Top Portfolio Management Services (PMSs) in India (<https://www.pmsaifworld.com/blog/top-portfolio-management-services-pmss-in-india/>)
Gift City Investments For NRIs (<https://www.pmsaifworld.com/gift-city-investments-for-nri-in-india/>)

Summit and Awards

Alternative Investment Summit and Awards 2024 (<https://www.pmsaifworld.com/pms-aif-summit-and-awards-2024/>)
Methodology & Winners 2024 (<https://www.pmsaifworld.com/indias-smart-money-manager-awards-2024-methodology-categories-winners/>)
Alternative Investment Summit and Awards 2023 (<https://www.pmsaifworld.com/pms-aif-summit-and-awards-2023/>)
Methodology & Winners 2023 (<https://www.pmsaifworld.com/indias-smart-money-manager-awards-2023-methodology-categories-winners/>)
Alternative Investment Summit and Awards 2022 (<https://www.pmsaifworld.com/pms-aif-summit-and-awards-2022/>)
Methodology & Winners 2022 (<https://www.pmsaifworld.com/indias-best-pms-aif-as-per-performance-methodology-categories-winners-2022/>)

ABOUT OUR COMPANY

High-Performance Investing

PMS AIF WORLD is a New Age Investment Services Company, providing analytics-backed good quality investing service experience with an endeavor and promise for wealth creation and prosperity. Over 5+ years, we have been managing 500+ UHNI & NRI families, across 1000 CR+ assets. We are very selective in our approach, and analyze products across 5 Ps – People, Philosophy, Performance, Portfolio, and Price with an endeavor to ascertain the Quality, Risk, and Consistency (QRC) attributes before suggesting the same to investors.

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

PMS AIF WORLD – DELHI

Part of 69, 2nd Floor, Karuna Kunj Sector-03, Dwarka, Delhi -110078

PMS AIF WORLD – KOLKATA

4A Ray Street, Kamdhenu Complex, Kolkata - 700020

 (<https://www.facebook.com/pmsaifworld/>) 
(https://twitter.com/pms_aif_world) 
(<https://www.linkedin.com/company/pmsaifworld/>) 
(<https://www.youtube.com/pmsaifworld>)

PMS AIF WORLD – MUMBAI

504, Zion Building, 5th Floor, Sector 10 Kharghar, Navi Mumbai, Maharashtra 410210

PMS AIF WORLD – BENGALURU

Adarsh Palm Retreat, Phase 3 Apartments, Tower 7, Flat P103, Bellandur, Bangalore 560103

RISK DISCLAIMER: Investments are subject to market-related risks. The content on the website is meant for general information purposes and not to be construed as any recommendation or advice. The investor must make their own analysis and decision depending upon risk appetite. Only those investors who have an aptitude and attitude to risk should consider the space of Alternates (PMS & AIFs). Past Performance may or may not be sustained in the future and should not be used as a basis for comparison with other investments. Please read the disclosure documents carefully before investing. PMS & AIF products are market-linked and do not offer any guaranteed/assured returns. These are riskier investments, with a risk to principal amount as well. Thus, investors must make informed decisions. It is necessary to deep dive not only into the performance, but also into people, philosophy, portfolio, and price, before investing. We, at PMS AIF WORLD do such a detailed 5 P analysis. Please click [here](https://www.pmsaifworld.com/disclaimer/) to read the entire disclaimer document. (<https://www.pmsaifworld.com/disclaimer/>)

© 2024 PMS AIF WORLD. All Rights Reserved

[\(https://heweprocapital.com/\)](https://heweprocapital.com/) About Us (<https://www.pmsaifworld.com/about-us/>)

Terms and Conditions (<https://www.pmsaifworld.com/terms-and-conditions/>)

Privacy Policy (<https://www.pmsaifworld.com/privacy-policy/>)

Disclaimer & Disclosures (<https://www.pmsaifworld.com/disclaimer/>) (<https://wa.me/+919899840890>)



(tel: +919899840890)