

Sundaram Alternates Rising Star PMS

KEY PORTFOLIO ATTRIBUTES

ABOUT SUNDARAM ALTERNATE ASSETS

Sundaram Alternate Assets Ltd. (SA) (<https://sundaramalternates.com/>) 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

KEY PEOPLE



Mr. Madanagopal Ramu
Fund Manager

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Investment Objective

The investment objective of Sundaram Alternates Rising Star PMS is to seek long term capital appreciation by investing in companies that can be termed as small caps .

Investment Strategy

Sundaram Alternates Rising Star 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

Investment Philosophy

Sundaram Alternates Rising Star PMS follows a Long only, buy and hold strategy, with a Bottom-up approach to stock selection.



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Sundaram Alternates
Voyager Portfolio

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Portfolio

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Sundaram India Secular
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(SISOP PMS)

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

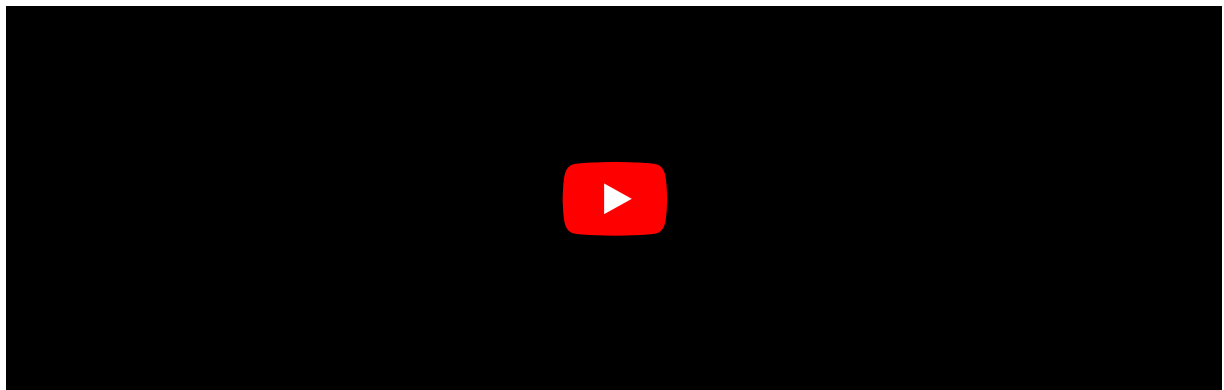
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