

White OAK India Pioneers Equity Portfolio

ABOUT WHITE OAK CAPITAL MANAGEMENT

White Oak Capital Management is one of the biggest India-focused long-only boutique Investment management and advisory firm, founded in 2017 by Mr. Prashant Khemka (https://www.pmsaifworld.com/team_mf/prashant-khemka/), who was a former CIO and Lead Portfolio Manager of India Equity and Global Emerging Markets Equity at Goldman Sachs Asset Management. White Oak (<https://www.pmsaifworld.com/partner/white-oak-capital-management/>) has developed a process based investing framework to ensure

KEY PEOPLE



(https://www.pmsaifworld.com/team_mf/prashant-khemka/)

Mr. Prashant Khemka

Founder

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Investment Objective

The objective of this portfolio is to generate sustained capital appreciation through superior returns over time with a long-only balanced & well diversified investment approach of select companies agnostic to benchmark S&P BSE 500

The WhiteOak Difference

WhiteOak Capital Group has its core competence in domestic and global emerging equity markets.

WhiteOak Capital's differentiation lies in:

- Large Investment Team
- Balanced Portfolio Construction
- Sectoral Analyst: Team within team structure
- Experienced Analysts
- Strict forensic for negative list of stocks
- Tactical Allocation to Small Caps

Investment Culture

- People: Team of Sector Experts with Global Experience
- Bottom-up Stock Selection based Philosophy
- Time Tested Process
- Balanced Portfolio Construction
- Invest in business, don't bet on macro
- Aim to ensure performance a function of stock selection
- Disciplined Fundamental Research

Investment Process

Idea Generation

- Company visits & field work Supply chain meetings

Analysis

- Business Assessment & Financial modelling

Decision & Sizing

- Combination of business & value Compare across opportunities

Ongoing Evaluation

- Monitor value gap

Avoid misgoverned companies

- Avoid companies which engage in unethical practices or have poor accounting visibility

Investment Philosophy

The investment philosophy of White Oak India Pioneers Equity Portfolio is that outsized returns should be earned over time by investing in great businesses. And, a great business is one that is well managed, growing, scalable, and generates superior returns on incremental capital.

A bottom-up stock selection based Philosophy is followed which intends to buy great businesses at attractive values.

The attributes they look for are: Superior returns on investment capital, scaleable long term opportunity, strong execution and governance.

The motto is to invest in businesses, not to bet on macros as the firm believes that macros are for entertainment, so, watch them, but focus on Micros i.e. the underlying portfolio companies in terms of business earnings, and valuations [Current price at a substantial discount to intrinsic value] – this is where White Oak's Team keeps its focus.

Hence the investment philosophy of White Oak Capital is, "Growth at reasonable prices(GARP)".

Investment Strategy

The investment strategy of this fund follows strong investment values via long-only fundamental bottom-up stock selection. They have a simple yet powerful investment philosophy of investing in businesses based on stock selection, rather than being driven by macro factors.

At White Oak (<https://www.pmsaifworld.com/partner/white-oak-capital-management/>) , they believe outsized returns are earned over time by investing in great businesses at attractive values, i.e. growth at reasonable prices. A great business is one that is well managed, scalable, and generates superior returns on incremental capital.



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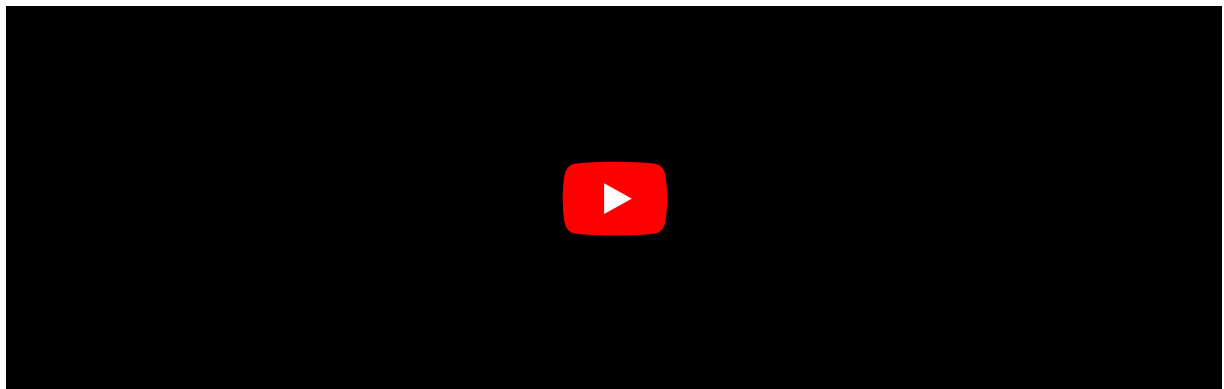
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We offer responsible, long term investment service. Invest with us in the best quality products and make informed investment decisions.

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