



Invasset Growth Fund PMS

KEY PORTFOLIO ATTRIBUTES

INVASSET LLP

Invasset launched with a dream to make people achieve their financial freedom. Invasset is a SEBI registered portfolio management service provider (SEBI: INP000006907) consisting of a specialized research team having 25+ years of professional experience and inhouse developed INVasset AAID TM : (Algo, AI & Data) based approach for selection of companies and sectors that will lead to Alpha generation.

Vision: To generate consistent sustainable wealth for clients by investing in the Indian equity market.

PORTFOLIO MANAGERS



(https://www.pmsaifworld.com/team_mf/anirudh-garg/)

Mr. Anirudh Garg
Partner & Fund
Manager,
INVASSET LLP

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Investment Objective

- Prudent management is very important in the building of long-term wealth-creating businesses
- The two most important forces that influence investing are greed and fear. AI helps in overcoming these biases and thus create alpha
- Hungry for Growth and Growth never comes Cheap. Generally, Invasset's portfolios have a higher PE Ratio as compared to peers
- Buy and Rotate Strategy beats both active and passive investment

styles

- Appreciation of capital should be consistent and permanent.
- Depreciation of Capital of capital should be limited and temporary
- Winners of one primary bull run will not outperform in the next bull run. Keep on looking for new sectors.
- Dig for the tailwinds and take advantage of both macro and micro developments
- Keep winners and weed out our losers
- The size of the Opportunity and the ability to harness the opportunity is what matters. Focus on the Sharks in the ocean
- The interest rate Cycle plays a major role in deciding the future performance of stocks and even companies
- Cyclical are great opportunities to earn alpha if you know your commodity well.

Investment Strategy

- Companies with Prudent Management Team
- Companies that can grow 20%+ for a consistently long time
- Companies generating High Return of Capital Employed
- Companies giving an edge to their competitors due to a moat
- Companies with free cash flow generation
- Companies in commodity sectors available at oversold prices due to a market meltdown
- Companies operating in monopolistic markets

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



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