

# ENAM India Vision Portfolio

## KEY PORTFOLIO ATTRIBUTES #


## ABOUT ENAM ASSET MANAGEMENT

Enam Group is a recognized leader in the Indian Capital Markets. It specialized in providing best-in-class research based financial services to its clients that wanted to participate in the growth of the Indian economy.

## KEY PEOPLE



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Dr. Raghavendra Reddy  
Portfolio Manager, Enam  
AMC

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### Investment Objective

The investment objective of ENAM India Vision Portfolio is to ride the US\$ 10-Trillion Opportunity. It aims to identify high-quality businesses that are structurally well-positioned, have sustainable competitive advantages and strong execution capability for consistent long-term growth.

### India Vision 2031:

India, the fastest-growing major economy shows potential to hit us\$ 10 trillion GDP by 2031

Enablers: Right Catalysts, Effective Policies, Timely Actions

Solid growth visibility; demography matches skills with scale  
Climbing up the ladder – now the 5th largest economy  
Young economy – 60% population under 30  
Services sector is India's backbone but manufacturing is fast catching up

## Investment Strategy

The investment strategy of ENAM India Vision Portfolio to invest in companies across market capitalisation segments and sectors that offer participation in select megatrends like Urbanisation, Premiumisation, Formalisation, Digital adoption, Consolidation, Work force participation, and Favourable demographics. Thus, capitalizing on the structural growth opportunity in Indian economy.

The investment process and strategy of ENAM India Vision Portfolio PMS is as follows:

Investment Universe: Over 175 companies across sectors and market capitalization

Research & Analysis: Conducts comprehensive operational, financial and valuation analysis. Continuous interaction with management teams

Idea generation: Understand performance levers, identify long term catalysts and analyse business cycles for potential upsides

Portfolio construction and Risk management: Portfolios are constructed with best ideas with an in depth analysis of companies and valuations. Manage risk through a disciplined portfolio construction process within the prescribed internal investment risk management guidelines

Monitoring: Continuously monitor investments to validate investment hypothesis

Wealth Creation Opportunities:

### Structural Opportunities

Current leaders

Consistent growth

Benefitting from macros

### Emerging Opportunities

Emerging leaders

Niche businesses & changing scale/trajectory

Beneficiaries of megatrends/tailwinds

### Disruptive Opportunities

New businesses challengers & disrupting status quo

Benefitting from innovation

### Special Opportunities

Change in regulations

Technology shifts

Change in promoters/management

Change in market structure

Business model transformation

Change in balance sheet

Corporate action – merger/ demerger

New products launches

## Investment Philosophy

The investment philosophy of ENAM India Vision Portfolio is to seek and identify high-quality businesses that are structurally well-positioned, have sustainable competitive advantages and strong execution capability for consistent long-term growth.

ENAM India Diversified Equity Advantage (EIDEA) PMS is a market & sector agnostic PMS. The investment philosophy is focused in identifying long term opportunities across leaders and emerging companies. The guiding principles in identifying a company include – Size of opportunity, longevity of business, quality of management and how value accretive is the business.

It looks at long term wealth creation through focused investing:

Focused portfolio

Target industry leaders and challengers

Competent management

Margin of safety

The ENAM Edge:

Focused Portfolio Management firm with a single investment strategy

True disclosure of performance track record

Longest serving single manager track record

Long serving investment team with experience through various business cycles

Initiatives undertaken to develop a comprehensive proprietary ESG framework



ENAM India Diversified Equity Advantage (EIDEA) PMS

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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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