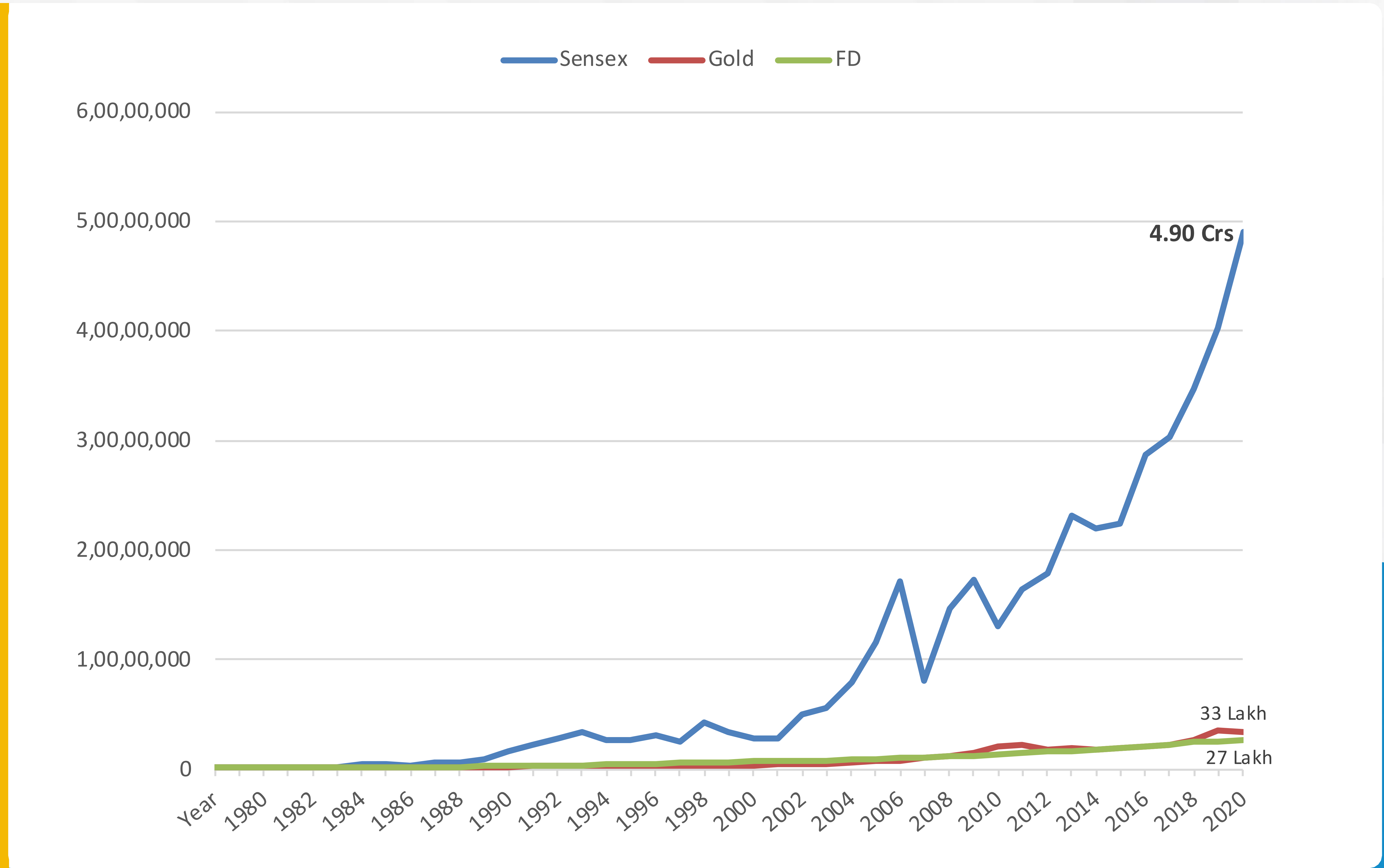
Equity for **Wealth Creation**

InvesQ
intelligent investing

WHY EQUITY?

Value of Rs. **1,00,000 invested** in 1979 in various asset classes



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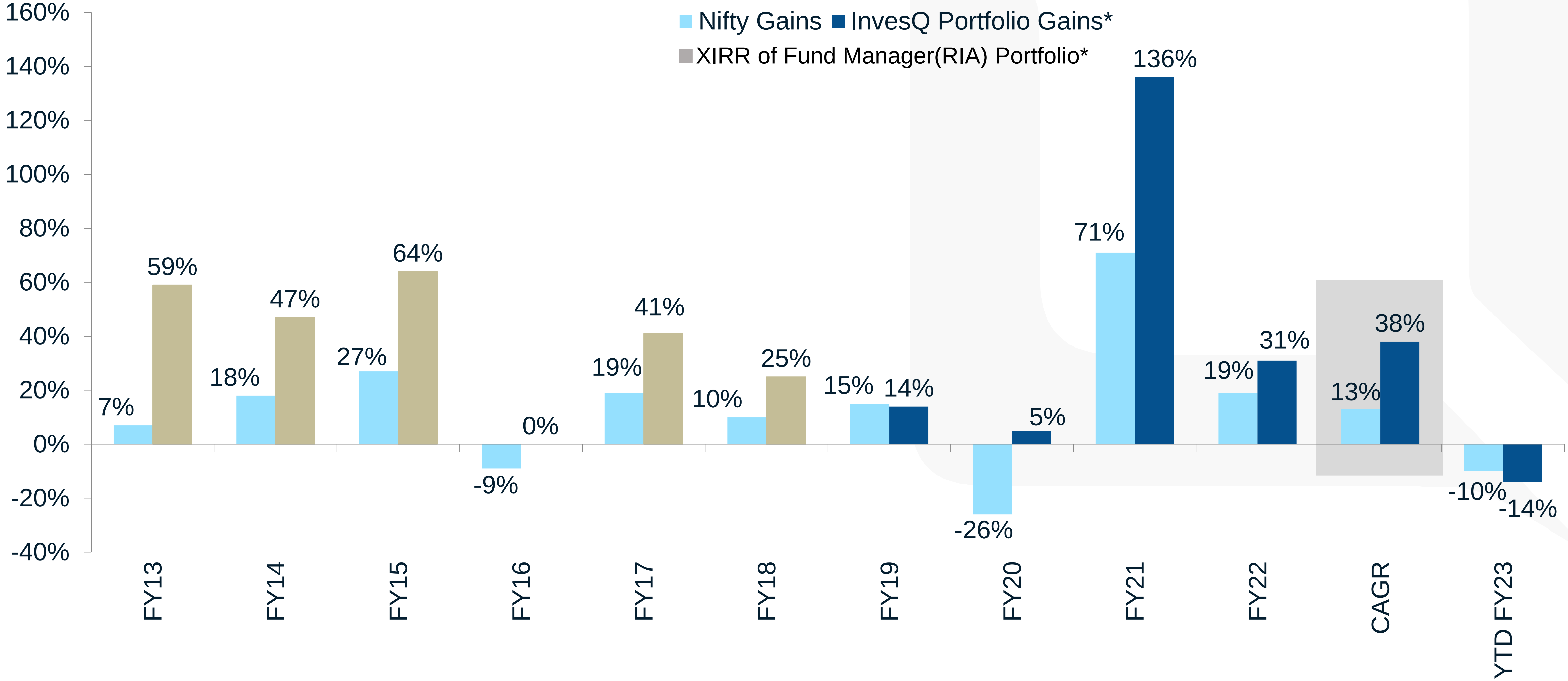
PERFORMANCE

38% compounded returns from FY '13 to FY '22 against 13% by Nifty



* The above Chart consists of Performance of Fund Manager's (RIA) Personal Portfolio from April 2012 till December 2017 and InvesQ's Portfolio since January 2018.

PERFORMANCE

Cumulative Performance of InvesQ Portfolio vs Nifty

Period till 30th June 2022	Absolute Gains	
	InvesQ	NIFTY
1 Month	-5%	-5%
3 Month	-14%	-10%
6 Month	-20%	-9%
9 Months	-19%	-10%
12 Months	-5%	0%
24 Months	124%	53%
36 Months	162%	34%
48 Months	187%	47%

PERFORMANCE

Quarterly Performance of InvesQ Portfolio

Period	Quarterly Absolute Gains			
	Q1	Q2	Q3	Q4
FY19	11%	-5%	4%	4%
FY20	6%	7%	11%	-16%
FY21	18%	33%	28%	18%
FY22	18%	17%	1%	-7%
FY23	-14%			

FOCUS | DNA INVESTING

Our investment philosophy hinges on investing in businesses / managements having strong DNA to perform better than industry over long period of time

BUSINESSES HAVING POTENTIAL AND CAPABILITY/ DNA to grow consistently at high growth rates over long periods of time while maintaining good quality of financials.

MANAGEMENTS THAT HAVE AND DEMONSTRATE ABILITY to grow ahead of industry in good and bad times without sacrificing quality of financials.

"Our investment style has been given a name - focus investing - which implies 10 holdings, not 100 or 400. The idea that it is hard to find good investments, so concentrate in a few, seems to me to be an obvious idea. But 98% of the investment world does not think this way."

CHARLIE MUNGER

At InvesQ we practice FOCUS investing in 10-12 best ideas

INVESTMENT OBJECTIVE

Deliver alpha returns by investing in a concentrated equity portfolio of 10-12 good-quality businesses **with phenomenal earnings growth potential**

Portfolio construct to deliver 20-30% earnings growth that should reflect in similar capital appreciation

INVESTMENT STRATEGY

Growth oriented portfolio of good businesses

- Compounders
- Turnaround Opportunities

CAPITAL PROTECTION

LOW BUSINESS RISK

CONSISTENT GROWTH

MEDUM TO HIGH RETURN POTENTIAL

RESEARCH PROCESS

Filtering stocks on history → Moat identification → Industry analysis → Company analysis → In-depth financial analysis → Picking the best stocks on GARP

A FEW SUCCESS STORIES

Company	Holding Period(Yrs)	Anualised Returns (%)	Absolute Returns (%)
HDFC Bank	5.7	15	118
Bajaj Finance	5.6	41	601
APL Apollo Tubes	4.3	41	339
Divis Laboratories	3.7	31	177
P. I. Industries	3.7	40	248
IFB Industries	3.4	68	482
La Opala RG	3.1	130	1264
3M India	3.1	25	101
Neogen Chemicals	3.0	77	459
Fine Organic Industries	2.5	46	159
Grindwell Norton	1.8	53	111
Britannia	1.4	75	124
Control Print	0.5	316	103

[#]Updated till 30th June 2022

Aashish Upganlawar

FUND MANAGER - INVESQ INVESTMENT ADVISORS PRIVATE LIMITED

Aashish is a Chartered Accountant and a SEBI Registered Investment Advisor. He has an illustrious career of over 17 years in Equity Fund Management and Institutional Equity Research. He was a part of Fund management teams in leading Mutual funds, Insurance companies and Specialised Equity portfolio management outfits. He spent a good part of his career in Institutional Equity Research advising domestic and foreign institutional investors on their investments.

EXPERIENCE HIGHLIGHTS:

- Fund Manager at **InvesQ Investment Advisors Pvt. Ltd.**
- Head of Equity Research at **Purnartha**
- Sector Lead Consumer, Media & Entertainment at **Elara Capital**
- Sector Lead Consumer, Media & Entertainment at **Spark Capital**
- Cluster Head of Research at **ShareKhan**
- Senior Analyst at **CNBC TV18**
- Research Analyst and Assistant Fund Manager at **Bajaj Allianz**
- Research Analyst at **LIC Mutual Fund**

EDUCATION:

- Chartered Accountant

THE TEAM

Siddharth Purohit
FUND MANAGER & PRINCIPAL OFFICER

Siddharth is a PGDBM in Finance with over 15 years of experience in Equity Research. Having worked with both Institutional and Retail Broking side as the lead Analyst he has developed the ability to pick stocks across sectors. He has been associated in the past with leading domestic brokerage houses like SMC Global Securities and Angel Broking.

Shital Mane
TECH & OPERATIONS

A people's person who looks after Technology & Operations at InvesQ. She comes with a rich experience from her 14-year long career at Technology companies like Cognizant Technology Services and Mind Tree. She is an Engineering graduate in Computer Sciences and has an analytical bent of mind.

Saurabh Lele
INVESTMENT ANALYST

An inquisitive Researcher with his skills in screening accounts and data. His experience in audits is a great asset to InvesQ as it helps identify Red flags. Saurabh is a problem solver and path finder to dig relevant data for reaching conclusions to the most critical questions in Equity Research.

The number of securities that should be owned to reduce portfolio risk is not great; as few as ten to fifteen holdings usually suffice.

Seth Klarman

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(Non-Individual Regn, Validity: Mar 24, 2021 – Perpetual)
Principal Officer – Mr. Siddharth B. Purohit
Contact Details – siddharth@invesq.in / 98338 01324

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*Disclosure as per SEBI Regulations