

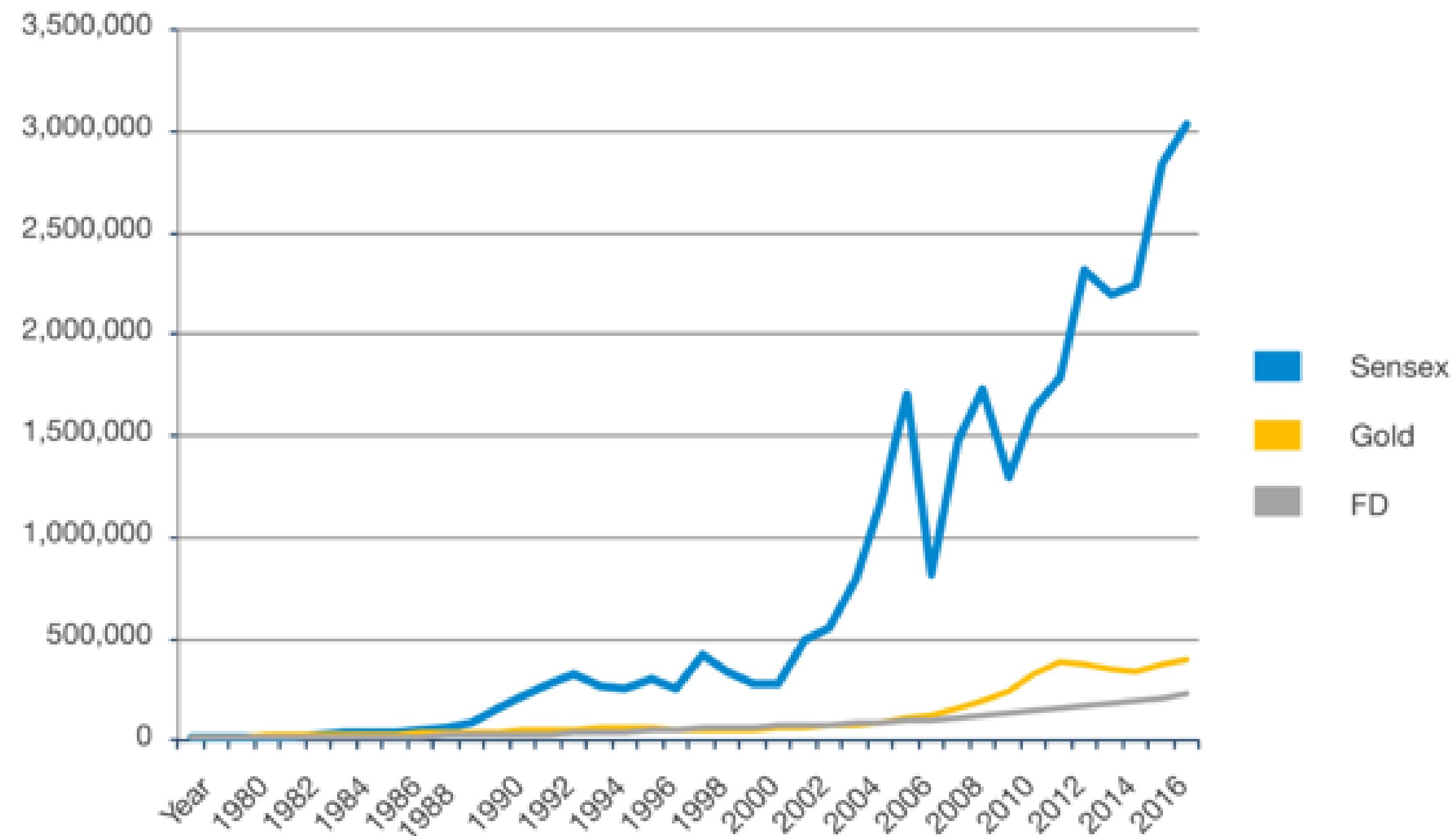
# Equity for Wealth Creation





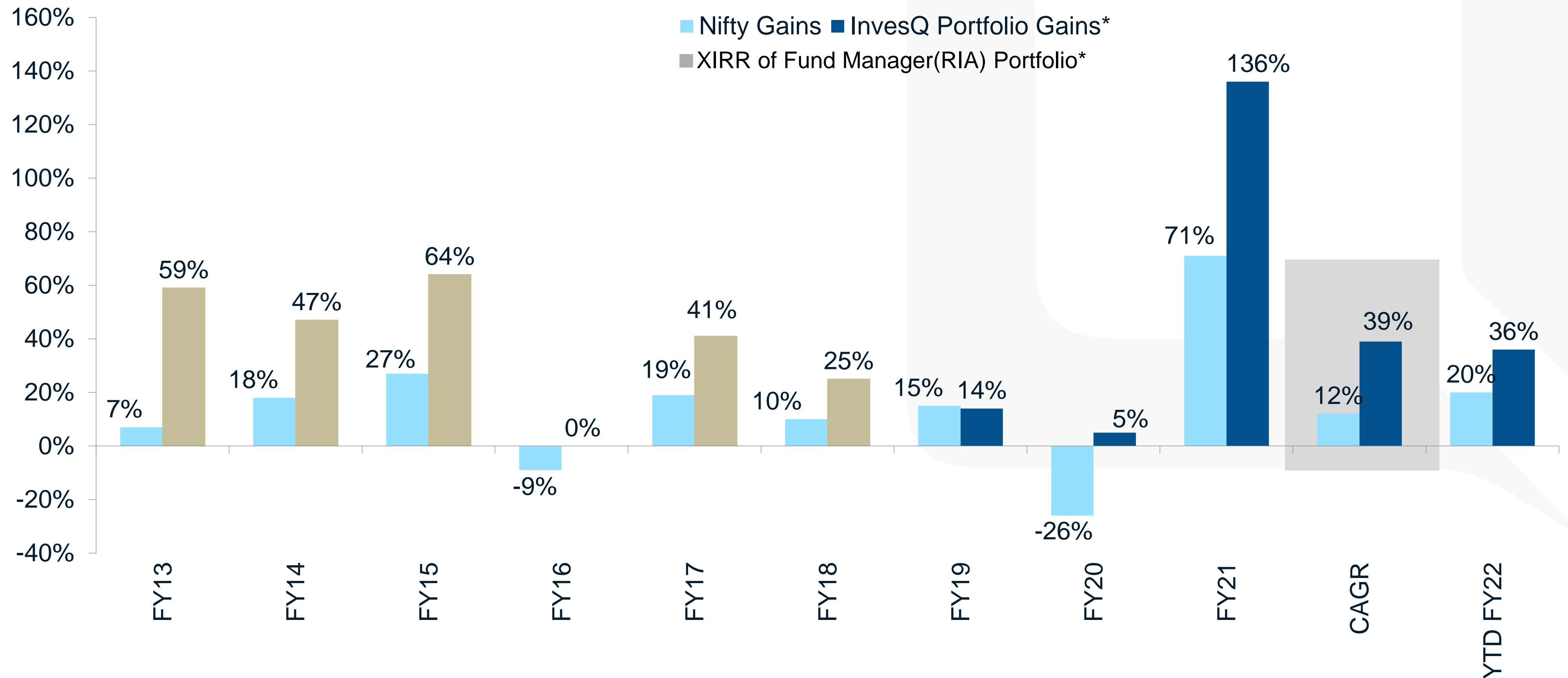
## WHY EQUITY?

Value of Rs. 10,000 invested in 1979 in various asset classes



## PERFORMANCE

**39% compounded returns from FY '13 to FY '21 against 12% 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.

**DISCLAIMER:** The displayed past performance is only for information purpose and in no way should be construed as an indicator of future results. InvesQ Investment Advisors Pvt. Ltd. or any of its employees / channel partners do not in any manner guarantee returns as Investment in Equities is subject to market risk.

## PERFORMANCE

### Cumulative Performance of InvesQ Portfolio vs Nifty

Period till 31st Oct 2021	Absolute Gains	
	InvesQ	NIFTY
1 Month	-1%	0%
3 Month	7%	12%
6 Month	28%	21%
9 Months	61%	30%
12 Months	100%	52%
24 Months	183%	49%
36 Months	282%	70%

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## 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%		

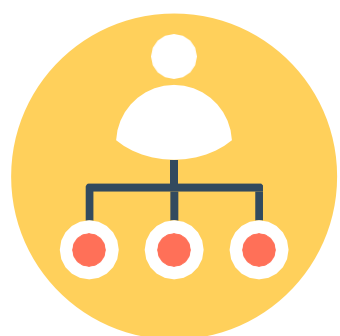
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## FOCUS | DNA INVESTING

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

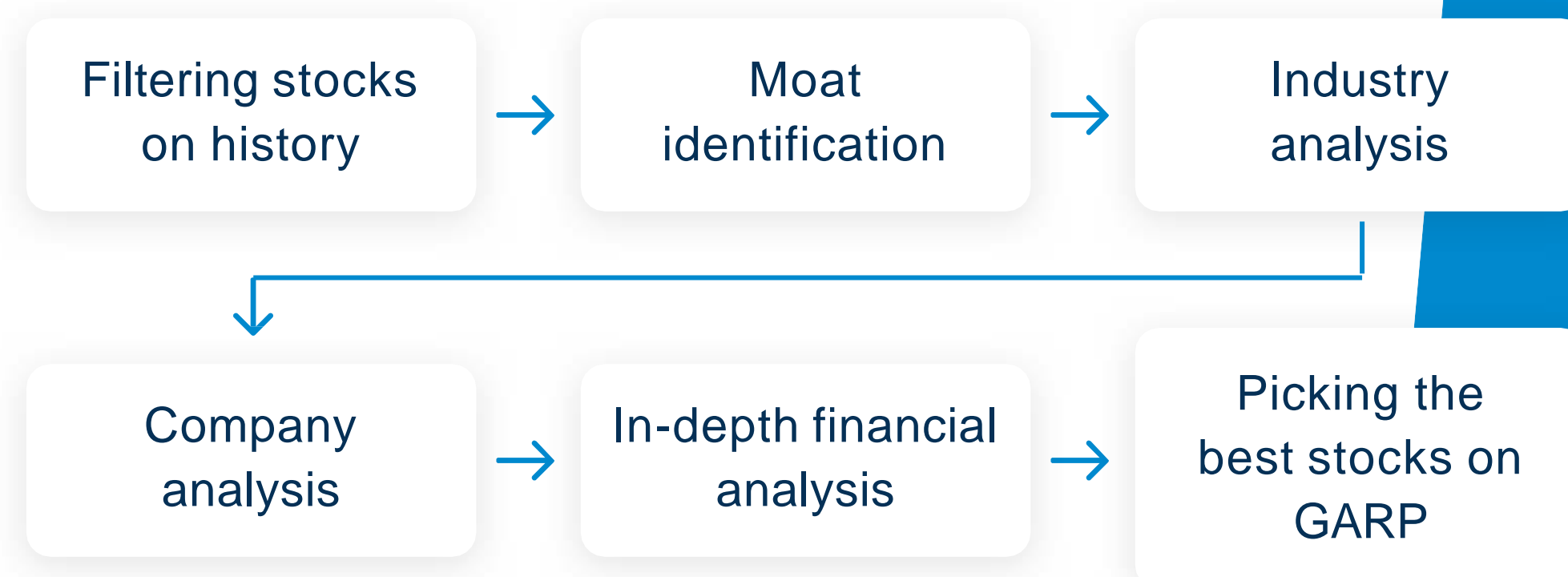
Deliver alpha returns by investing in a concentrated equity portfolio of 10-12 good-quality businesses with phenomenal earnings growth potential

## INVESTMENT STRATEGY

Growth oriented portfolio of good businesses

- Compounders
- Turnaround Opportunities

## RESEARCH PROCESS



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



CAPITAL  
PROTECTION



LOW BUSINESS  
RISK



CONSISTENT  
GROWTH



MEDIUM TO HIGH  
RETURN  
POTENTIAL

## A FEW SUCCESS STORIES

Company	Holding period (Yrs)	Anualised Returns (%)	Absolute Returns (%)
HDFC Bank	5.0	20	156
Bajaj Finance	5.0	58	861
APL Apollo Tubes	3.6	48	313
IFB Industries	3.4	68	482
La Opala RG	3.1	130	1264
3M India	3.1	25	101
Divis Laboratories	3.1	56	293
P. I. Industries	3.0	60	308
Fine Organic Industries	2.5	46	159
Grindwell Norton	1.8	53	111
Britannia	1.4	75	124
Control Print	0.5	316	103



## THE TEAM



### 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 16 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



**Saurabh Lele**  
INVESTMENT ANALYST

An inquisitive Researcher with his skills in screening accounts and data. His past 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.



**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.



**Sudeep Nair**  
BUSINESS DEVELOPMENT

Sudeep has over 13 years of experience in Business Development and Customer Service. In the course of his career he has represented Global Brands such as Citibank, Standard Chartered Bank and ING Vysya Bank in the retail banking and wealth management space. Sudeep strongly believes that nurturing relationships is the only way to develop a sustainable business model.



**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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Principal Officer – Mr. Aashish J. Upganlawar

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