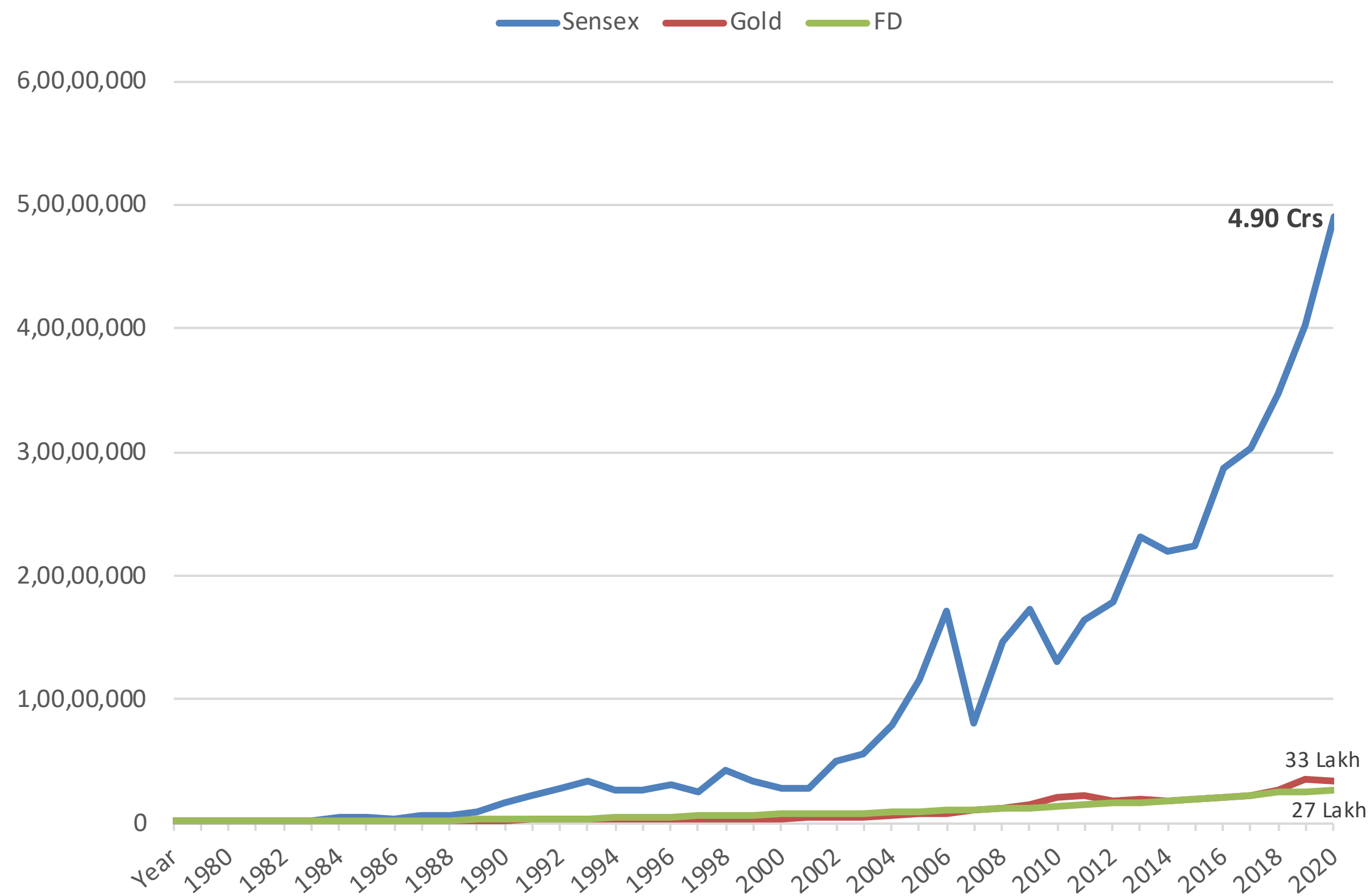


Equity for Wealth Creation



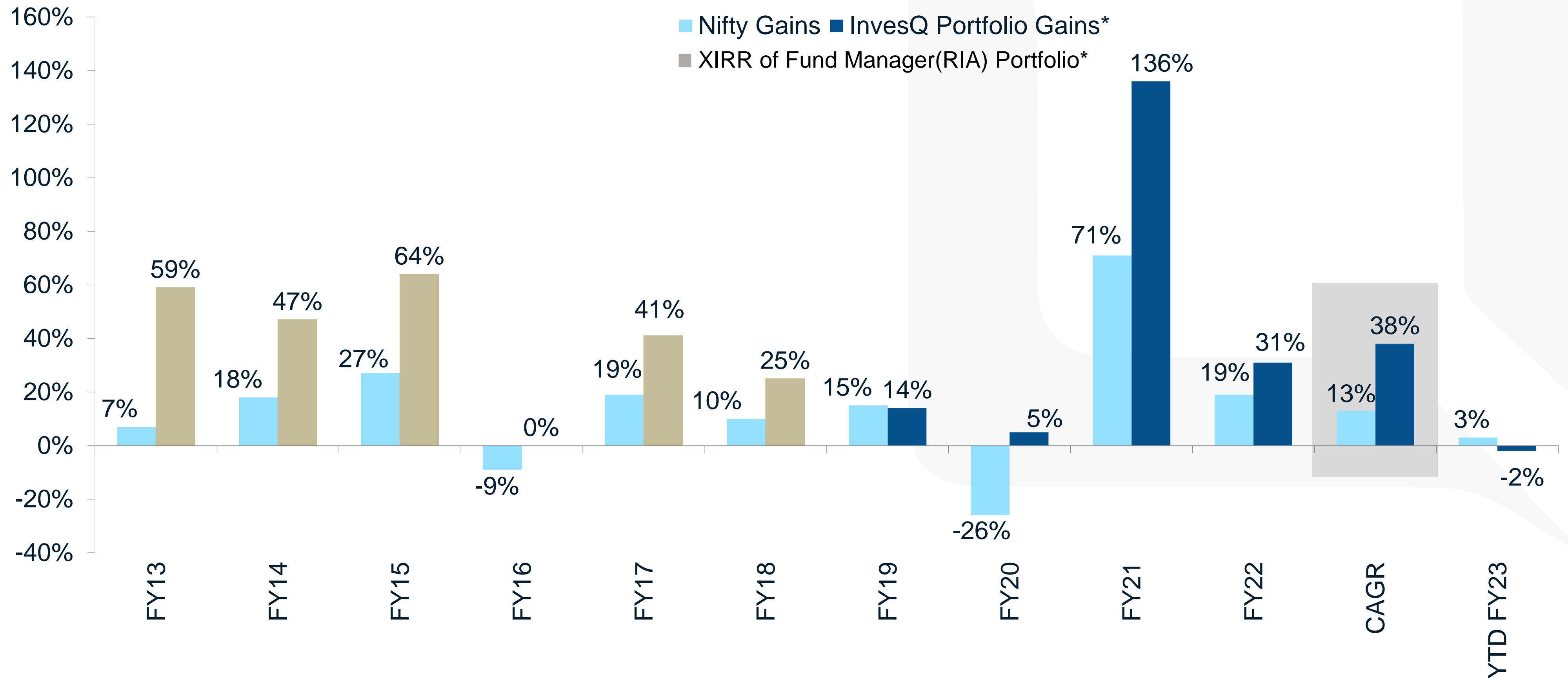
WHY EQUITY?

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



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.

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 31 st Oct 2022	Absolute Gains	
	InvesQ	NIFTY
1 Month	0%	5%
3 Month	3%	5%
6 Month	-5%	5%
9 Months	-5%	4%
12 Months	-6%	2%
24 Months	89%	55%
36 Months	167%	52%
48 Months	259%	73%

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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%	1%	-7%
FY23	-14%	14%		

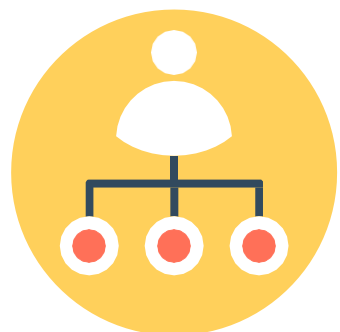
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FOCUS | DNA INVESTING

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

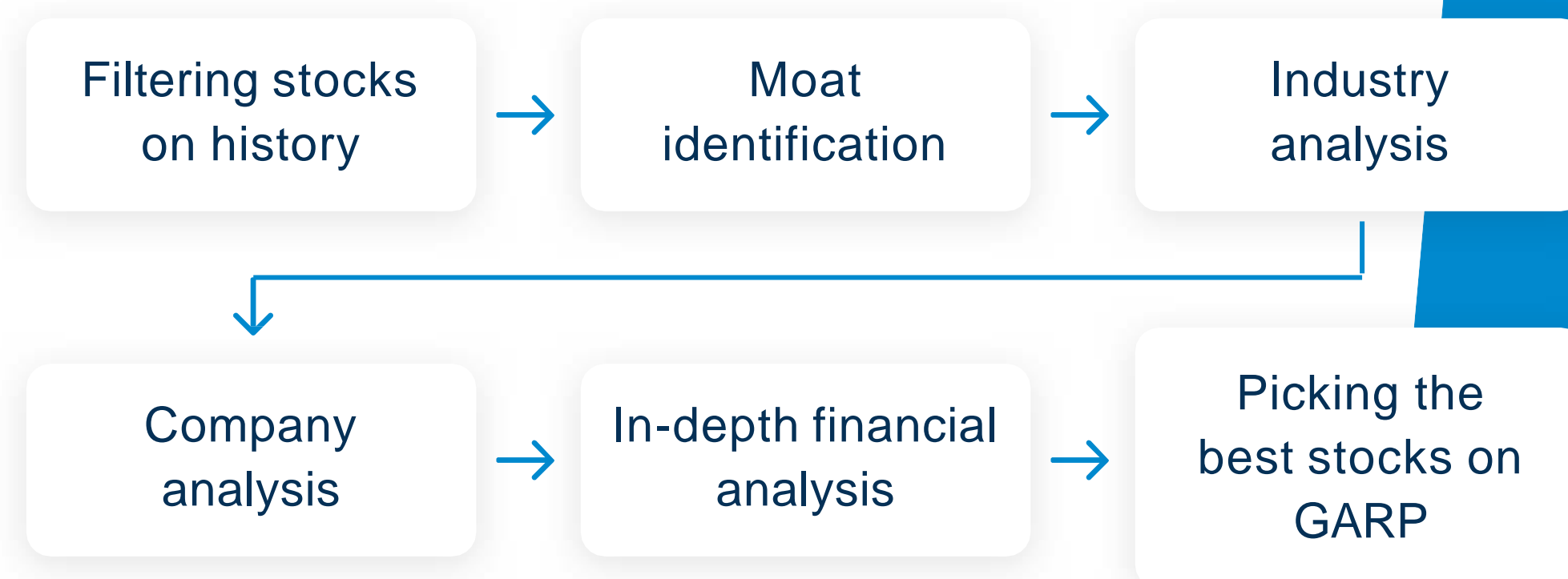
Deliver alpha returns by investing in a concentrated equity portfolio of 10-12 good-quality businesses **with phenomenal earnings growth potential**

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



MEDUM TO HIGH
RETURN
POTENTIAL

A FEW SUCCESS STORIES

Company	Holding Period (Yrs)	Annualised Returns (%)	Absolute Returns (%)
HDFC Bank	6.0	16	142
Bajaj Finance	6.0	45	828
APL Apollo Tubes	4.6	45	457
Divis Laboratories	4.1	28	175
P. I. Industries	4.0	45	341
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

THE TEAM



Aashish Upganlawar

FOUNDER & DIRECTOR, INVESQ INVESTMENT ADVISORS PVT. LTD.

Aashish is a Chartered Accountant. He has an illustrious career of over 18 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**
- 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. He has tracked multiple sectors in his career journey and thus gained a strong understanding of different segments of the Indian Business Diaspora. Having worked with both Institutional and Retail Equity Research companies as Lead Analyst, he has developed the ability bottom-up stock picking across sectors. He has been associated in the past with leading domestic brokerage houses like SMC Global Securities and Angel Broking.



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.



Shital Mane
COMPLIANCE, 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.



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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