

Investment Objective

To multiply wealth for a long period of time by investing in a portfolio of multi-baggers from high growth small and mid-cap stocks.

Investment Strategy

With an increase in per capita GDP there is a significant change in the consumption pattern of Indian consumers. This will create new industries and will give an opportunity to young companies to grow fast and benefit from these new trends. We have chosen 12 such companies that have already created a substantial market presence and are now geared to grow rapidly.

Top 5 stocks

Name	Sector
UPL Ltd	Agro Chemicals
Zee Entertainment Enterprises Ltd	TV Channels
Dhanuka Agritech Ltd	Agro Chemicals
Spandana Sphoorty Financial Ltd	Consumer Finance
Sharda Cropchem Ltd	Agro Chemicals

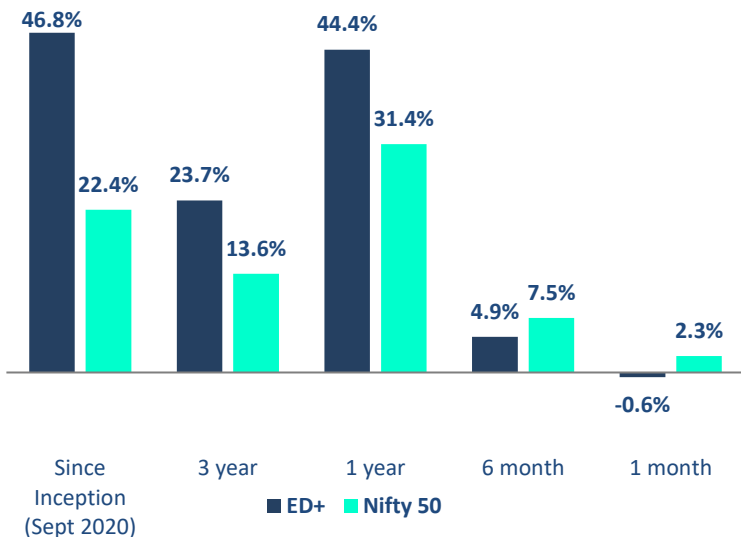
Min Investment: INR 2,00,000

Fees: 2.5% of avg. AUM per year, paid monthly

SIP Option: Available after min. investment of INR 2,00,000.

Min SIP: INR 50,000

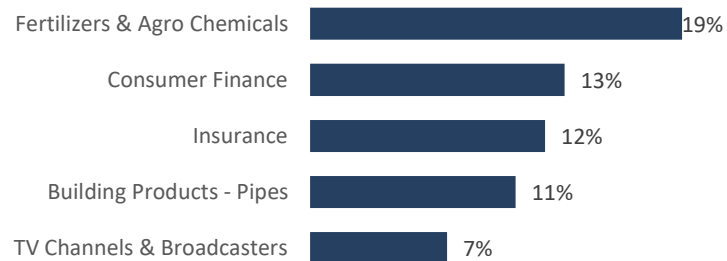
Strategy vs. benchmark:



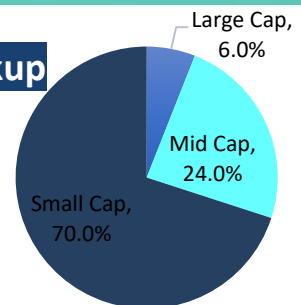
Investment Universe

Our chosen universe is companies that have a market capitalization of less than INR 35,000 crores. They are all rapidly growing in their fast growth industry. They have demonstrated high level of corporate governance and are managed by transparent and successful professional managers. The average market cap of the portfolio will be capped at INR 15,000 crore to ensure adequate representation of both small and mid-cap stocks.

Sector Breakup:



Market Cap Breakup



Riskometer



Fund Manager: Abhay Agarwal

Abhay started his investment career with Citibank in 1993 by managing its investment program. In 1998 he joined Chase Capital & worked in Hong Kong & Singapore as part of a team that invested in companies in Asia. As part of this team, he invested in upcoming companies like HDFC Bank, ICICI Bank, Marico etc. & provided seed capital to companies like Jubilant Foodworks, HDFC Securities & MTR Foods. He uses his 25 years of extensive investment experience to manage funds in a disciplined & systematic manner in order to compound the wealth of investors for a long period of time with minimal volatility.

About Piper Serica:

Piper Serica is a SEBI registered Portfolio Management Service (PMS) provider. The equity assets that we manage include a Mauritius based FPI, an Indian PMS & a Portfolio Advisory Platform. All the funds are managed under a top-down strategy based on Porter's 5 forces model, that identifies fast-growing industry leaders that compound earnings & grow the wealth of investors for a long period of time. In a short period, Piper Serica's PMS is rated as one of the top PMS's based on its performance.