

# Financial Powerhouse by Piper Serica



As of 31-March-2024

## Investment Objective

Generate higher than Fixed Income returns by investing in a portfolio of select 12 financial stocks.

## Investment Strategy

As the share of India in global GDP grows over the next 5 years so will the market capitalization of its stock market. The financial services companies will create tremendous wealth over the next 5-10 years as they grow their leadership and competitive moat. These companies have very stable and defensive business models. These stocks have been chosen carefully after detailed research and the portfolio construction is done in a way to reduce risk and optimize returns.

## Top 5 stocks

Security	Sector
Jio Financial Services Ltd	Financial Services
Indostar Capital Finance Ltd	Financial Services
Spandana Sphoorty Financial Ltd	Financial Services
Kotak Mahindra Bank Ltd	Financial Services
South Indian Bank Ltd	Financial Services

Min Investment: INR 2,00,000

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

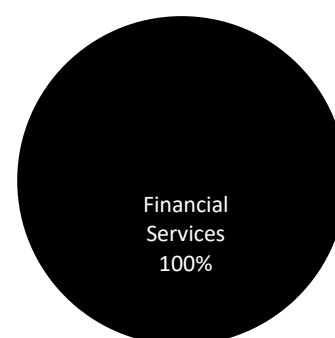
SIP Option: Available after min. investment of INR 2,00,000.

Min SIP: INR 50,000

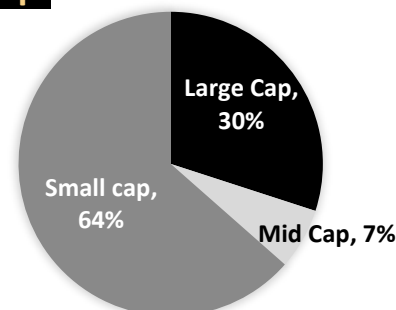
## Investment Universe

Our chosen universe is companies that have a market cap of more than INR 1 lakh crore and are a part of the Nifty50 Index. They are all profitable, growing, dividend paying and have a dominating presence in their industry. They have a stellar track record of generating shareholding value for more than twenty years and are managed by a team of highly successful professional managers.

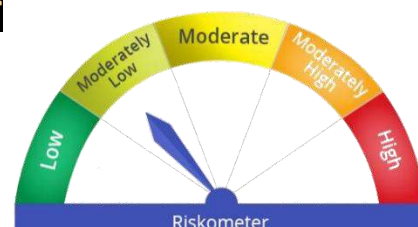
## Sector Breakup:



## Market Cap Breakup:



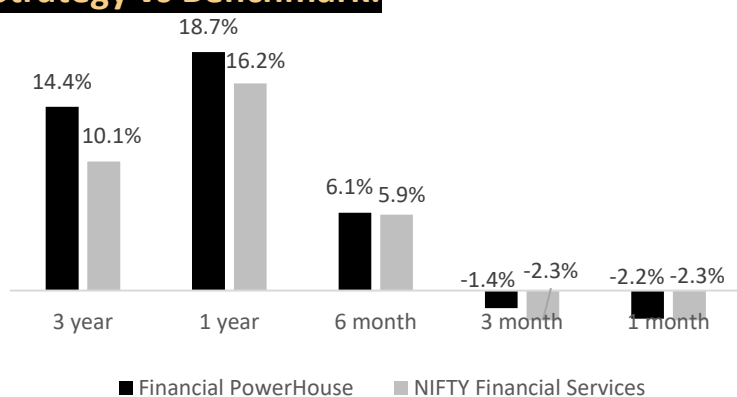
## Riskometer



## 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.

## Strategy vs Benchmark:



## 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.