

Formidable Dozen (FD+) by Piper Serica



As of 31-March-2024

Investment Objective

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

Investment Strategy

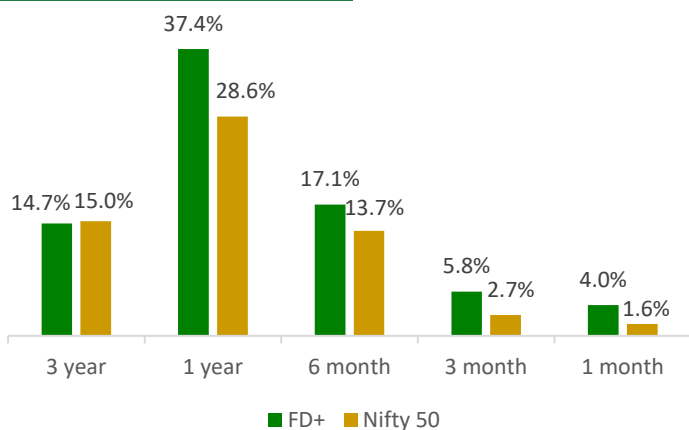
As the share of India in global GDP grows over the next 5 years so will the market capitalization of its stock market. The mega cap stocks that are part of the Nifty Fifty Index will create tremendous wealth over the next 5-10 years as they grow their leadership and competitive moat. These companies have very stable and defensive business models. By investing in them the investor has a very high probability of making a much higher return than the current returns available from fixed income options. 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
Apollo Hospitals Enterprise Ltd	Healthcare
Asian Paints Ltd	Materials
ITC Ltd	FMCG
Kotak Mahindra Bank Ltd	Banking & Financials
Reliance Industries Ltd	Diversified Conglomerate

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:



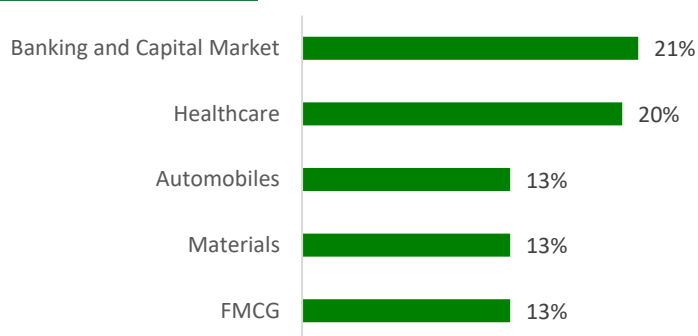
Fund Manager Abhay Agarwal

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.

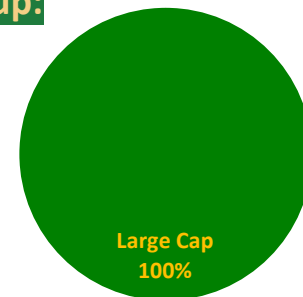
Investment Universe

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.

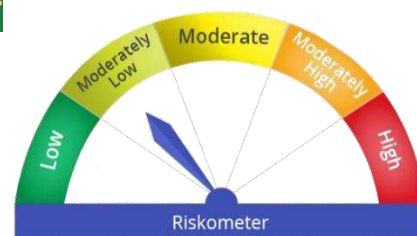
Sector Breakup:



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.