

Financial Powerhouse by Piper Serica



As of 30-June-2024

Investment Objective

Generate high returns by investing in a portfolio of select 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 largest sector in India's GDP is financial services and has already been a wealth creator for decades. The companies in this sector have very business models. By investing in them the investor has a very high probability of making a very strong return. 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
Spandana Sphoorty Financial Ltd	Consumer Finance
IndoStar Capital Finance Ltd	Consumer Finance
ICICI Bank Ltd	Private Banks
CMS Info Systems Ltd	Software Services
Star Health and Allied Insurance Company Ltd	Insurance

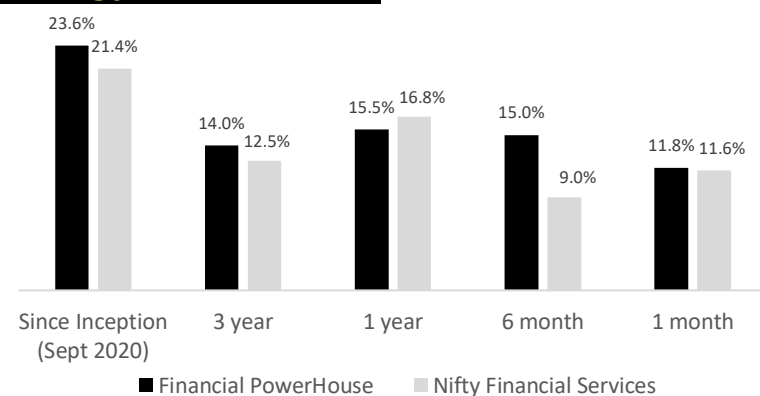
Min Investment: INR 99,000

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

SIP Option: Available after min. investment of INR 99,000.

Min SIP: INR 50,000

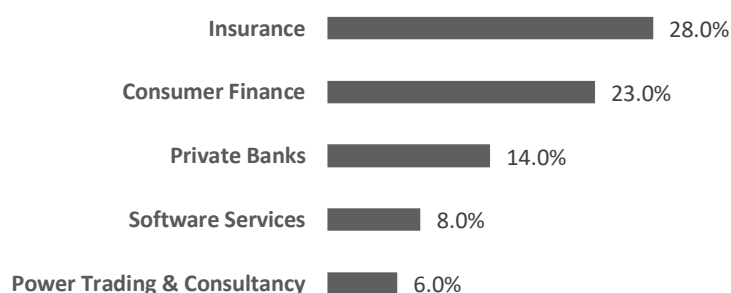
Strategy vs Benchmark:



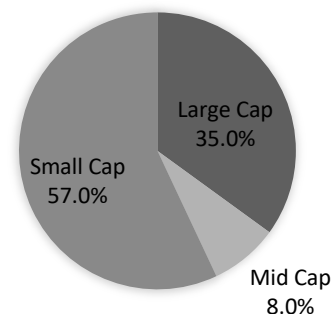
Investment Universe

Our chosen universe is companies that belong to financial services industry. They have high growth, leadership and a dominating presence in their industry. They have a stellar track record of generating shareholding value and are managed by a team of highly successful professional managers.

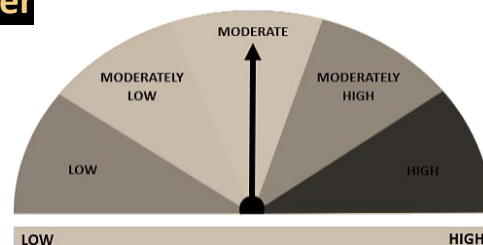
Sector Breakup:



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.