Portfolio Management Services

WD-Opportunity Portfolio

Wealth Discovery

Transforming Knowledge into Wealth

COMPLETE WEALTH MANAGEMENT SOLUTIONS !

Wealth Discovery
Transforming Knowledge into Wealth.

A Sector Agnostic and Market Opportunity Based Portfolio

Right Timing!

Right Stock!

Great Opportunity of Wealth Creation!

When there is a market correction like this time due the current economic situation in India it creates best opportunity to invest into quality stocks.

This portfolio is constructed to benefit from the current level of attractive market valuation with a view to create long term wealth appreciation.

"Volatility is the friend of long term Investor"
- *Warren Buffet*

Portfolio Investment Objective

These portfolios are developed with the primary investment objective of generating long term capital appreciation for the investors. The portfolios have equity as the only asset class, covering small, mid and large cap companies traded in the Indian equity markets. From time to time, the portfolio manager will be open to adding other assets classes or companies which do not fit into our market cap definition but offer very good risk reward opportunities.

Portfolio Construction Approach:

Our approach is driven entirely by our strategy of constructing bottom-up portfolios, by selecting companies demonstrating strong fundamentals and management quality, medium-term to long-term growth prospects and available at reasonable valuations. Our portfolio construction methodology does not adhere to the top-down approach where we give a specific weightage to a particular economic sector for our allocations.

Stock Selection Criteria – Why we included these stocks in our Portfolio!!

Our approach is driven entirely by our strategy of constructing bottom-up portfolios, by selecting companies demonstrating

- **Strong fundamentals** – Constant Better Financial Performance, Low leverage, High RoE & RoCE etc.,
- **Great management quality** – Investor friendly management with a good track record
- **Medium-term to long-term growth prospects** – Both industry & company has an opportunity to grow at a higher rate
- **Available at reasonable valuations** – All the companies are trading at a low valuation at this time comparing to their peers and also past valuation

Portfolio Constituents:

			Date:	5-Dec-16		
			Sensex	26,144		
Sl. No.	**Stock**	**Sector**	**Mcap**	**Price**	**Value**	**Category**
1	TVS MOTOR COMPANY	2/3 Wheelers	16,984	354	50,000	Large Cap
2	DHANUKA AGRITECH	Agrochemicals	3,531	701	50,000	Mid-Small Cap
3	SHARDA CROPCHEM	Agrochemicals	3,877	429	50,000	Mid-Small Cap
4	FIEM INDUSTRIES	Auto Parts & Equipment	1,434	1091	50,000	Mid-Small Cap
5	HDFC Bank	Banks	304,394	1183	50,000	Large Cap
6	AXIS BANK	Banks	110,780	458	50,000	Large Cap
7	DCB Bank	Banks	3,107	108	50,000	Mid-Small Cap
8	MANAPPURAM FINANCE	Finance (including NBFCs)	6,085	72	50,000	Mid-Small Cap
9	ASIAN PAINTS	Furniture,Furnishing,Paints	89,589	919	50,000	Large Cap
10	BERGER PAINTS	Furniture,Furnishing,Paints	21,337	219	50,000	Large Cap
11	ASIAN GRANITO INDIA	Furniture,Furnishing,Paints	631	211	50,000	Mid-Small Cap
12	THE BYKE HOSPITALITY	Hotels	659	165	50,000	Mid-Small Cap
13	DEEP INDUSTRIES	Integrated Oil & Gas	727	249	50,000	Mid-Small Cap
14	AVANTI FEEDS	Other Food Products	2,242	492	50,000	Mid-Small Cap
15	ASTRAL POLY TECHNIK	Plastic Products	4,731	395	50,000	Large Cap
16	VINATI ORGANICS	Specialty Chemicals	3,017	584	50,000	Mid-Small Cap
17	PODDAR PIGMENTS	Specialty Chemicals	228	214	50,000	Mid-Small Cap
18	ULTRAMARINE & PIGMENTS	Specialty Chemicals	496	170	50,000	Mid-Small Cap
19	FINEOTEX CHEMICAL	Specialty Chemicals	328	30	50,000	Mid-Small Cap
20	ALLCARGO LOGISTICS	Transportation - Logistics	4,199	166	50,000	Mid-Small Cap
	TOTAL				**1,000,000**	

Happy Investing!

Thank You!