KRIIS

THE PORTFOLIO MANAGEMENT COMPANY

Your Legacy Creators

OUR COMPANY

Philosophy

To curate a reasonably concentrated portfolio of high conviction stocks in large cap, midcap & small cap companies and nurturing the investment for 3-5 years

Focus

To identify the wealth creators of tomorrow

Channels

All our efforts are focused into listed equities

Expertise

Dynamic team with a combined experience of 100+ years

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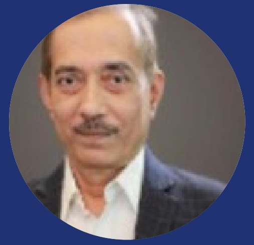
CORE TEAM

CA Rakesh Doshi, *Managing Director*

As Principal Fund Manager, his passion for compounding wealth through value investing has been the key motive behind the inception of KRIIS. With over 23 years of expertise in Indian equities, he brings to the profession discipline, vigor, passion, and an ability to identify winners.



Shridhar Iyer, *Chief Investment Officer*

A senior Wealth Management professional, Shridhar brings his wealth of experience to KRIIS He holds a Masters in Financial Management Degree from JBIMS & is also an ICWA member. He believes in building reasonably diversified portfolios of high-quality businesses having long-term competitive advantages in high-growth industries.

Bhavya Doshi, *Managing Director*

A young finance enthusiast, Bhavya has a Bachelors of Science in Economics & Finance from Bentley University Massachusetts. He also holds various certifications from NSE Academics Certifications in Financial Markets and Flame University Pune & Corporate Finance Institute Certification (CFIC). Before KRIIS, he worked for Banyan Tree Advisors.

Ajinkya Jadhav, Research Analyst

A professional in wealth management, leveraging a Master in Economics and over three years of equity research experience. His expertise spans sectors, with a background in engineering and technology, He brings a unique perspective with a specialized focus on Chemicals and Auto industries, complemented by a keen interest in small and micro-cap

INVESTMENT PRINCIPLES

- **Simplicity**

We truly believe that simple businesses with sustainable long term potential are the ones that create long term wealth

- **Competitve Moat**

We are constantly on the lookout for businesses which have a strong foundation and can sustain technological disruptions

- **Margin of Safety**

We steadfastly follow the principle of “Be fearful when others are greedy and greedy when others are fearful”

- **Corporate Governance**

We invest in businesses with strong ethics and values and competent management.

PHILOSOPHY

Buy Right

Pay Right

Track Often

BUILDING A RESILIENT PORTFOLIO (Pre-trade parameters)

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•Thorough Due Diligence:

-In-depth research on potential securities and markets
-Assess the financial health and stability of companies before inclusion in the portfolio.

•Risk Appetite Determination:

•Clearly define risk tolerance levels aligned with the fund's investment objectives.
•Establish predefined exposure limits for various asset classes and sectors.

•Channel Checks

•Regularly monitor and verify information from reliable sources
•Utilize industry contacts and networks to validate market intelligence
•Checks around the Promoter and the Management, their background, political links and activities beyond work.

•Dynamic Asset Allocation

•Implement an adaptive asset allocation strategy based on changing market conditions
•Adjust portfolio weights to capitalize on emerging opportunities and manage downside risk.

DYNAMIC RISK OVERSIGHT (Post-Trade Diligence)

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Limited Exposure Levels:

•Set and adhere to exposure limits to mitigate concentration risk.
•Regularly assess and adjust exposure levels based on market dynamics.

Stress Testing:

•Conduct periodic stress tests to simulate adverse market scenarios.
Evaluate the resilience of the portfolio to ensure it can withstand unforeseen challenges.

Real-Time Monitoring

•Utilize advanced monitoring tools to track portfolio positions and market variables.
•Keep track of any corporate announcement and investors calls.

Continuous Risk Assessment:

Regularly review and update risk assessments based on changing market conditions.

STRATEGY CONSTRUCT

Companies with Prudent Leadership

Period: Medium Term of 1-3 years, ideal for long-term investors (3-5 years)

Benchmark: BSE500

Allocation:

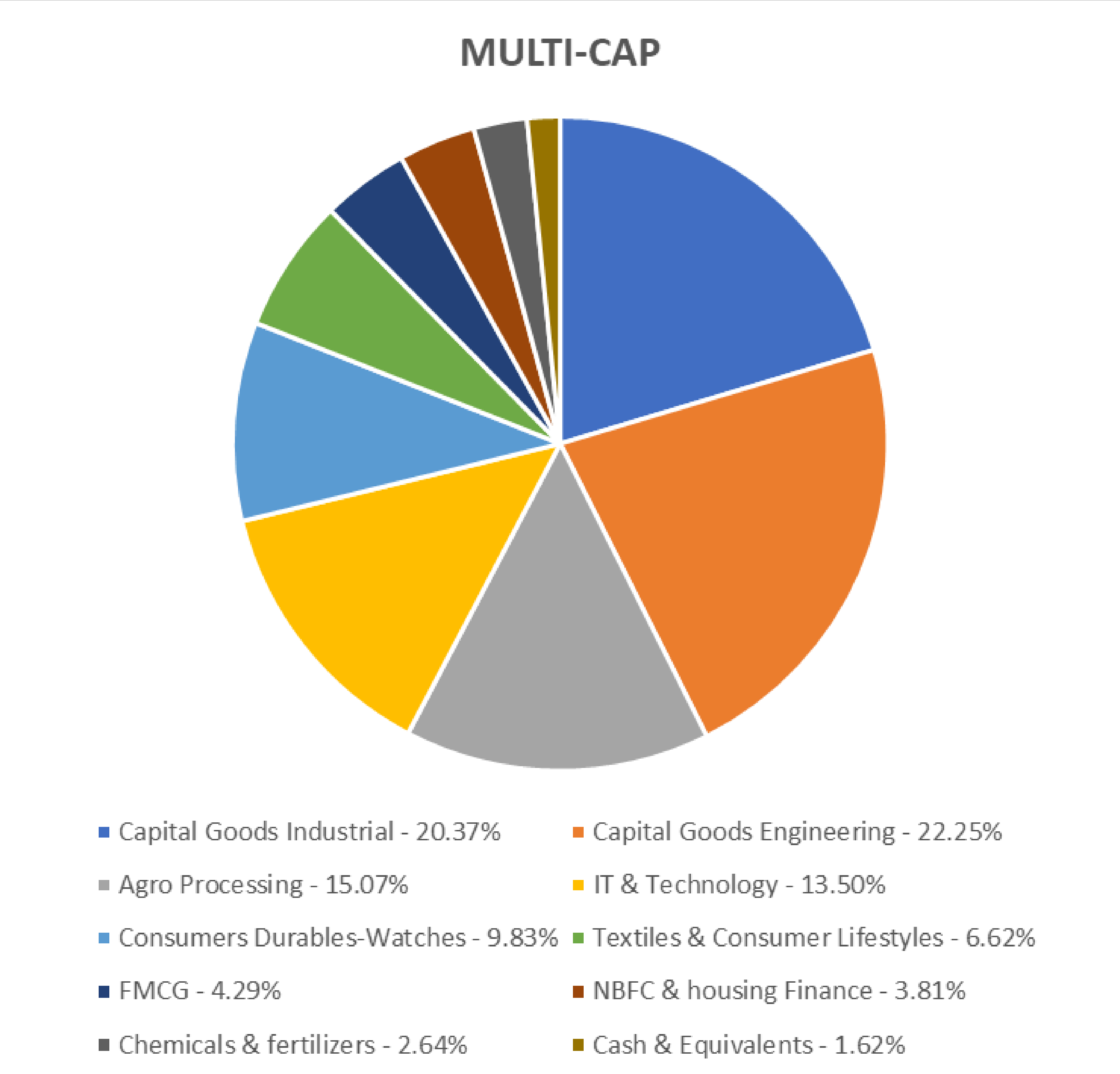
Large Caps: 0%- 30%

Mid & Small caps: 70%- 100%

Number of Stocks: Approx 15-20

Scrip Allocation: Not more than 10% on cost basis

Sector Allocation: Not more than 20%



KRIIS PERFORMANCE VS SENSEX

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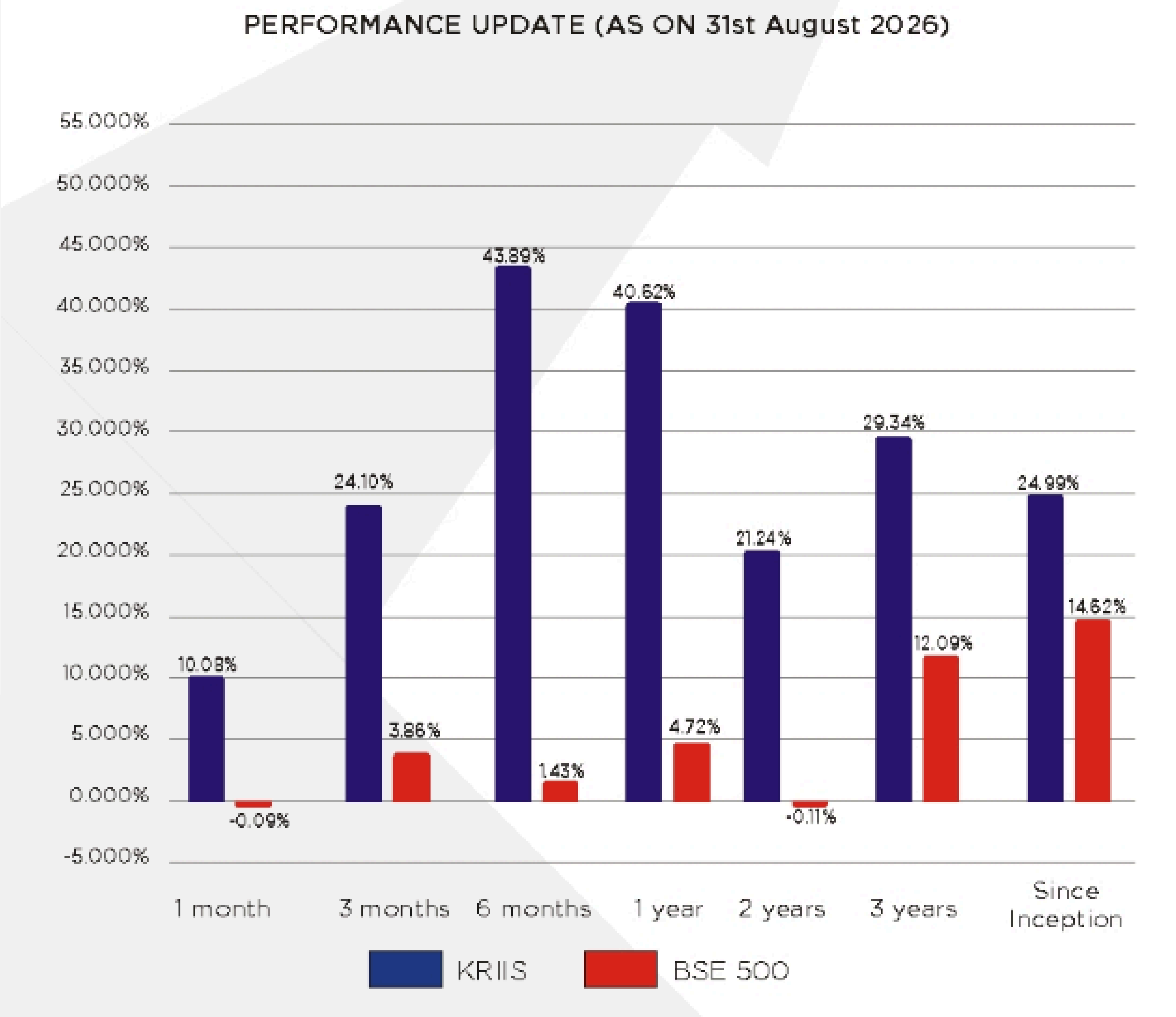

FEE STRUCTURE

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Transparent structure which includes

- No KRIIS Management Fees
  This includes no entry or exit load
- Performance Fee of KRIIS
  Flat 12.5%
- No Lock In Period

THANK YOU

OFFICE

606 Runwal R Square, LBS Marg Mulund, Mumbai-80

+91 85910 86965

www.kriis.in