



BügleRock

GROWTH OPPORTUNITIES PORTFOLIO

Putting Money Where The Growth Is

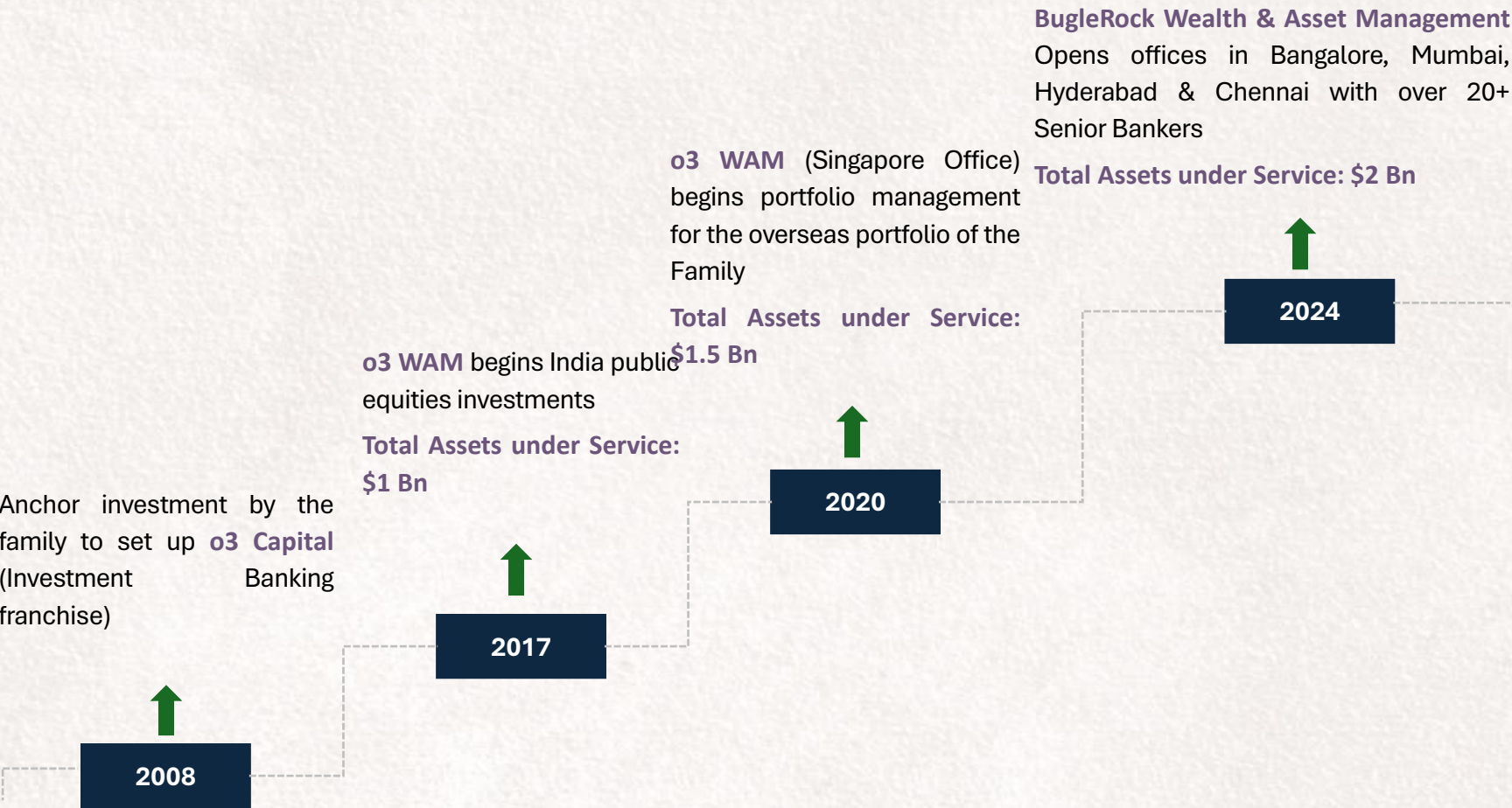
SEPTEMBER 2025

FOCUSED ON



OUR EVOLUTION

Backed by the founders of the one of the largest, high quality Indian IT companies



*WAM - Wealth & Asset Management

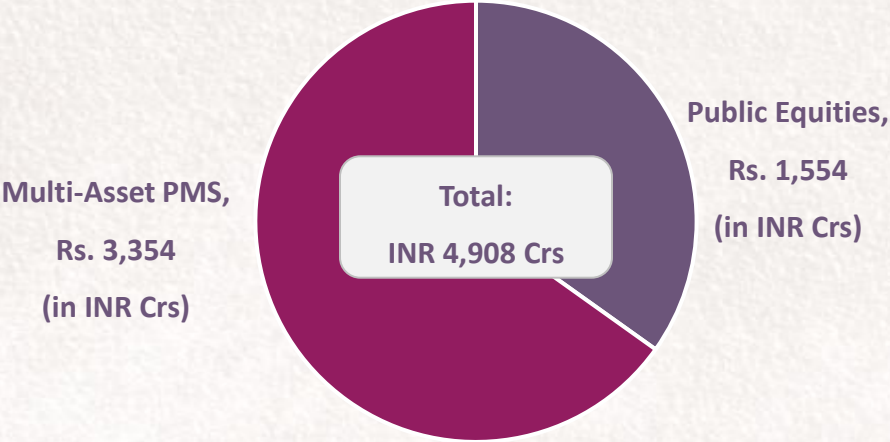
BUGLEROCK ASSET MANAGEMENT – PUBLIC EQUITY STRATEGIES

Core Value

The investment objective is to achieve capital appreciation through investment in a diversified portfolio of strong business, purchased at a reasonable valuation.

Special Situations Portfolio

The investment objective is to invest in a business with improving prospects resulting in a visible change in operating parameters but not yet fully reflected in the company’s P&L & Balance sheet.



Growth Opportunities Portfolio

Identifying the industry sectors that would benefit from the fructification of the Medium-Term and Long-Term Investment Themes.

INCA Portfolio

The strategy has unbiased factor-based investing approach with diversification from active and passive investment strategies.

WE SERVICE CLIENTS THROUGH A PLAYBOOK OF VARIOUS MODES CONVENIENT TO THE CLIENT

Resident Indian

- ✓ Onshore (India) Investments
- ✓ Offshore (Global) Investments
- ✓ LRS (Global) Investments



- ✓ SEBI – Licensed RIA (Registered Investment Advisor)
- ✓ SEBI – Registered PMS (Portfolio Management Service)
- ✓ SEBI – Registered CAT-III AIF (Alternative Investment Fund)



- ✓ Member of National Stock Exchange of India



- ✓ Member of Bombay Stock Exchange of India



- ✓ Association of Mutual Funds of India (AMFI) – registered distributor

Non-Resident Indian

- ✓ Onshore (India) Investments
- ✓ Offshore (Global) Investments



- ✓ Association of Portfolio Managers in India (APMI)



- ✓ Member of Central Depository Services Limited (CDSL)



- ✓ Capital Market Services (CMS) licensed by MAS
- ✓ MAS licensed Singapore – VCC Fund (Variable Capital Company)

The RIA and AIF services are offered independently by our associate and subsidiary company, which operates under its own SEBI registration and licenses.

OUR TEAM

Public Equities platform driven by a best-in-class team with proven track record in the markets



Manoj Shenoy
Co-Founder & CEO

30+ years of experience in the industry, including CEO at IIFL Asset Management, L&T Financial Services, EFG Bank & Anand Rathi Financial Services Limited



EA Sundaram
Executive Director & CIO – Public Markets

34+ years of experience in public equities & fund management, across close/open-ended funds & family offices



Rajesh Keswani
Principal Officer & Director – Public Markets

26+ years of experience across asset management and banking platforms



Apurva Sharma
Fund Manager – Public Markets

16+ years of experience in financial sector

Experience Across Leading Financial Institutions Including:

100+

Cumulative Years
of Experience



51 Years

Average Age of the
Management Team

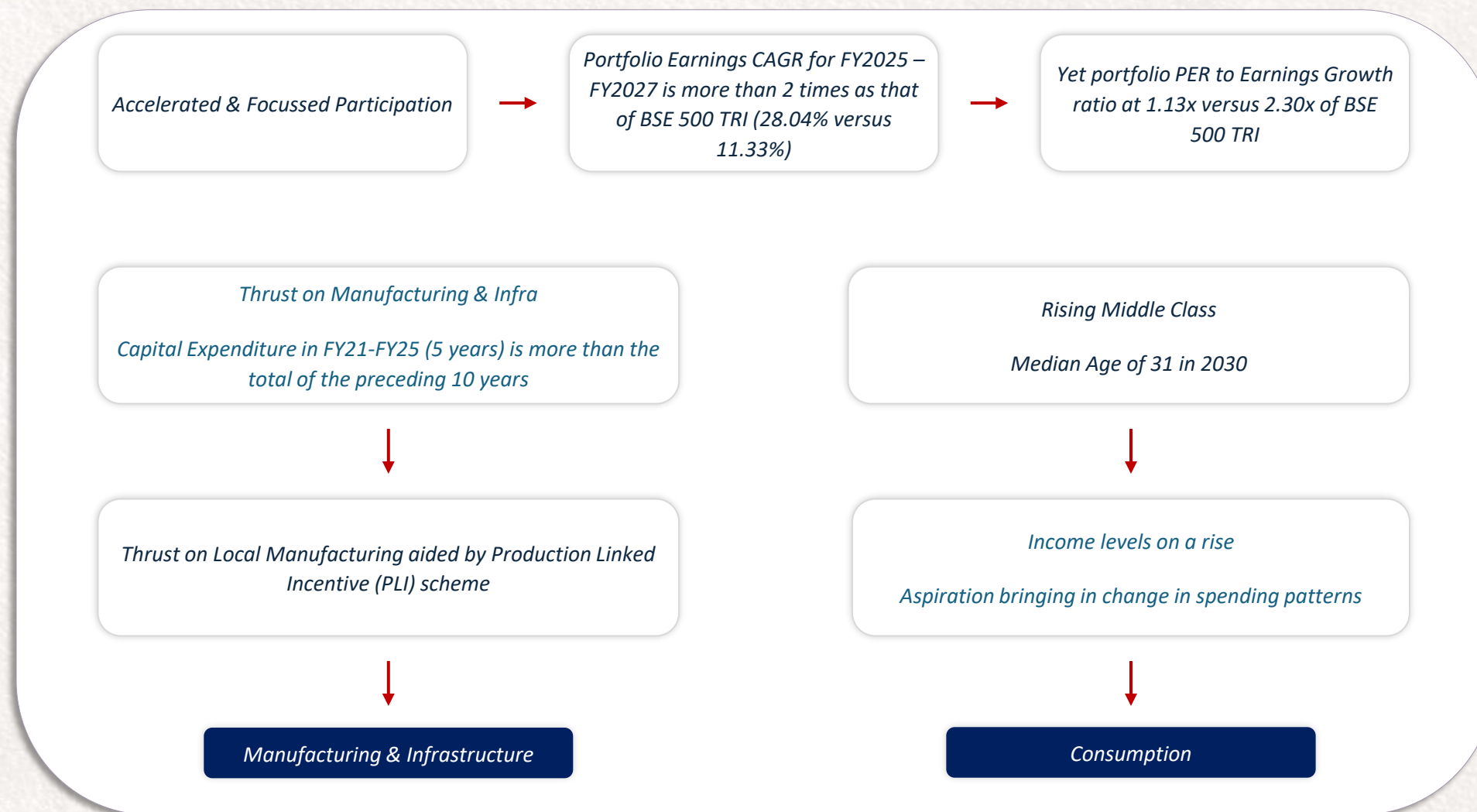
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THE OPPORTUNITY

Strong Visibility in Specific Sectors

WHY TO INVEST IN GOP



FROM THEME TO PORTFOLIO

Theme-based Investing

The portfolio is constructed on the foundation of two Investment Themes

- a) Medium Term Investment Theme, which we expect will play out over the next 3-5 years and
- b) Long Term Investment Theme, which we expect will last for at least a decade, if not longer.

The Portfolio Concept

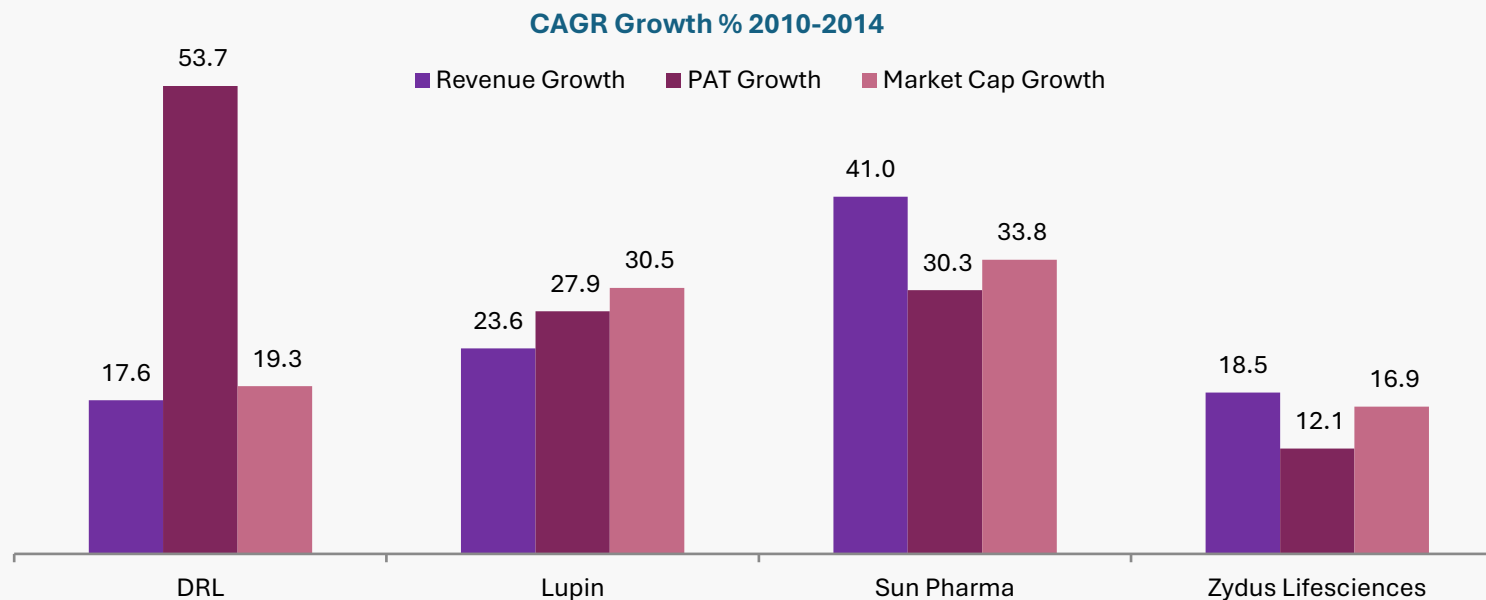
The Investments are made based on

- a) Identifying the industry sectors that would benefit from the fructification of the Medium-Term and Long-Term Investment Themes
- b) Based on the above, choose the company that occupies the position of:



AN EXAMPLE OF TAILWINDS BENEFITING A SECTOR

- In US, there was a big opportunity in the generics space around 2009. Marketing exclusivity was expiring, paving the way for generics.
- The intensity of the competition was low. Indian pharma companies started to work in 2005 – 2006 onwards to capitalize on this opportunity.
- As the base of Indian companies was small in US, they witnessed strong growth from 2009 onwards.
- These sector tailwinds resulted in significant market cap expansion for these companies.



Source: Ace Equity



MEDIUM TERM INVESTMENT THEME

MEDIUM TERM INVESTMENT THEME

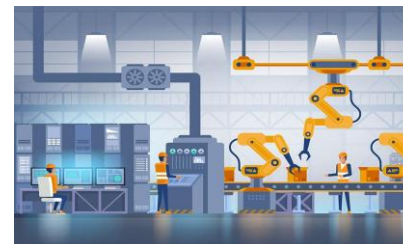
We believe that the following two themes have strong visibility over the medium term:

1



Development of physical infrastructure in India

2



Strong manufacturing companies, aided by the PLI schemes and the potential of sourcing manufactured products from India as an alternate source of supply for the world markets

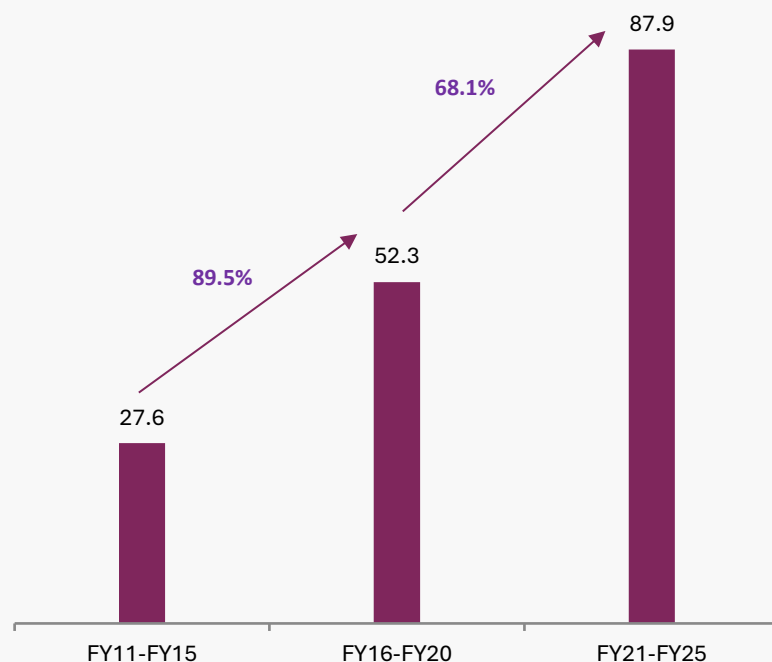
Government of India has envisaged INR 100 Tn investment over FY21- FY25 on infrastructure through National Infrastructure Pipeline (NIP). Infrastructure development will play the pivotal role to achieve ambitious target of INR 375 Tn economy by 2025.

Gati Shakti - Another INR 100 Tn plan announced in August 2021. This will address the issues of multi modal and last mile connectivity to increase the manufacturing competitiveness. This will bring 16 ministries together including rail and roadways for integrated planning.

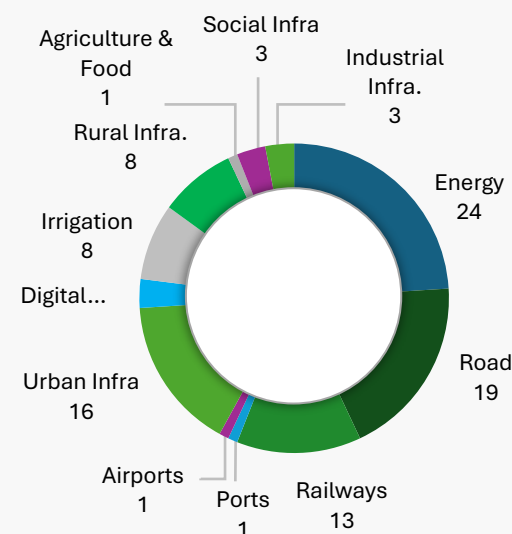
INFRASTRUCTURE – CAPITAL EXPENDITURE PIPELINE

The planned capex is increasing significantly (around 68%) during FY 21 to FY 25 as compared to FY 16 to FY 20

Capital Expenditure INR (Tn)



Sector Wise Capex (%)



Energy, Road, Railways & Urban Infra accounts for 72% of the planned capex

Source: National Infrastructure Pipeline Document of GOI

MANUFACTURING – PRODUCTION LINKED INCENTIVE (PLI) SCHEME

PLI acts as a catalyst for manufacturing activities

1

PLI scheme aims to boost domestic manufacturing and reduce import bills

2

Will induce demand for power, manufacturing equipment, industrial products and accessories, etc.

3

PLI scheme is expected to result in an incremental production of around INR 37.5 Tn during FY21 – FY25

4

Total outlay on this scheme is expected to be around INR 2 Tn

Focused Sectors for PLI

Advance Cell Battery

Solar PV Modules

Electronics

White Goods

Automobile & Components

Speciality Steel

Telecom Products Manufacturing

Pharmaceutical Drugs

Mobile Manufacturing

Textile

APIs

Food Products

Medical Device

Example of how PLI helped in Telecom Manufacturing

1

It is estimated that exports of mobile phones and after sales products will rise from INR 112 Bn in FY2019 to INR 8.25 Tn in FY2026

2

There was no manufacturing of mobile phones before 2005 in India

3

Scheme of INR 122 Bn for telecom sector to incentivize local production

4

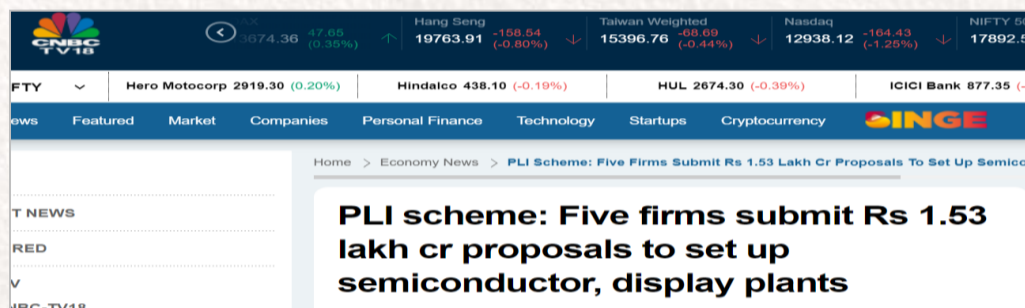
31 companies shortlisted to get this benefit

Source: pib.gov.in, investindia.gov.in

PLI SCHEME – GENERATING STRONG INTEREST ACROSS SECTORS



Sector	Target (INR Bn)	Interest Received (INR Bn)
Auto	425	748.5



Semiconductor	760	1,530
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ACC Battery	180	450
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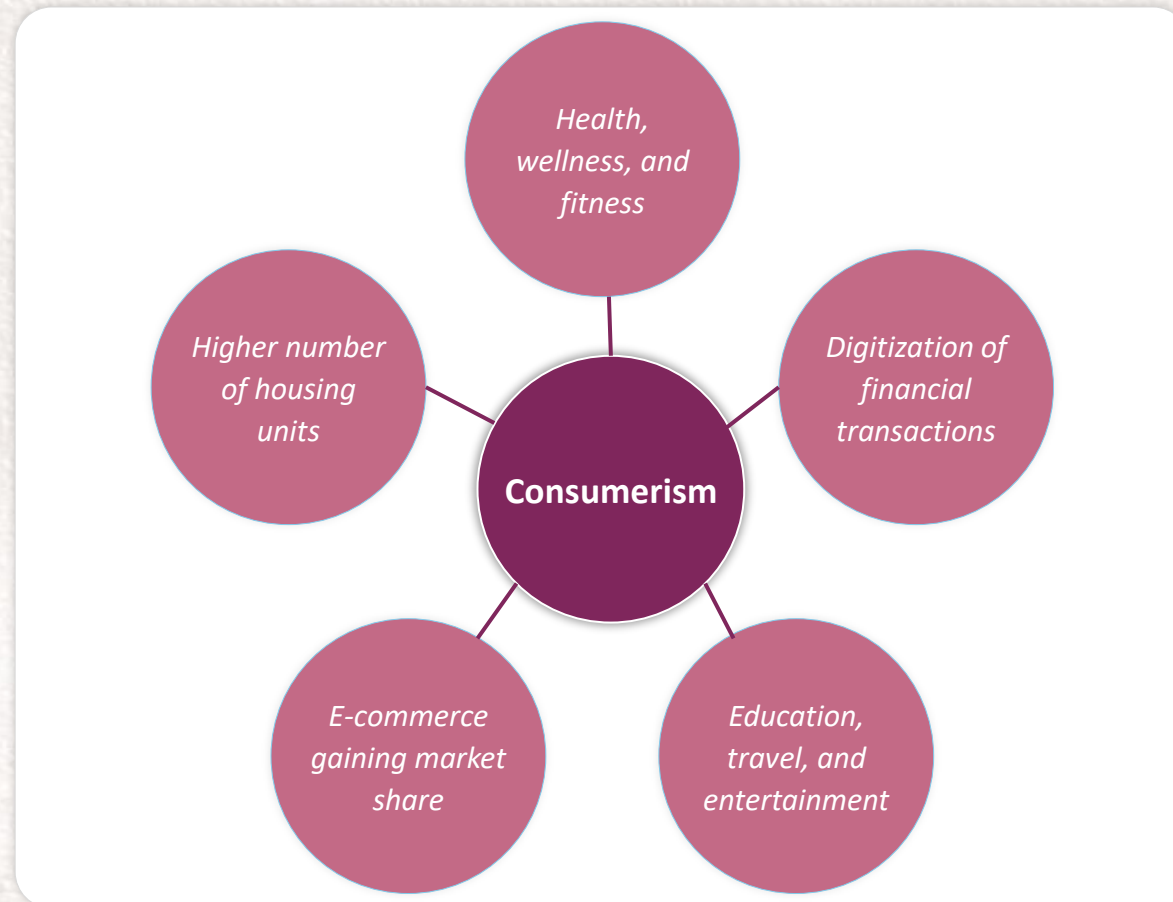
Source: Economic Times, CNBC, Business Standard



LONG TERM INVESTMENT THEME

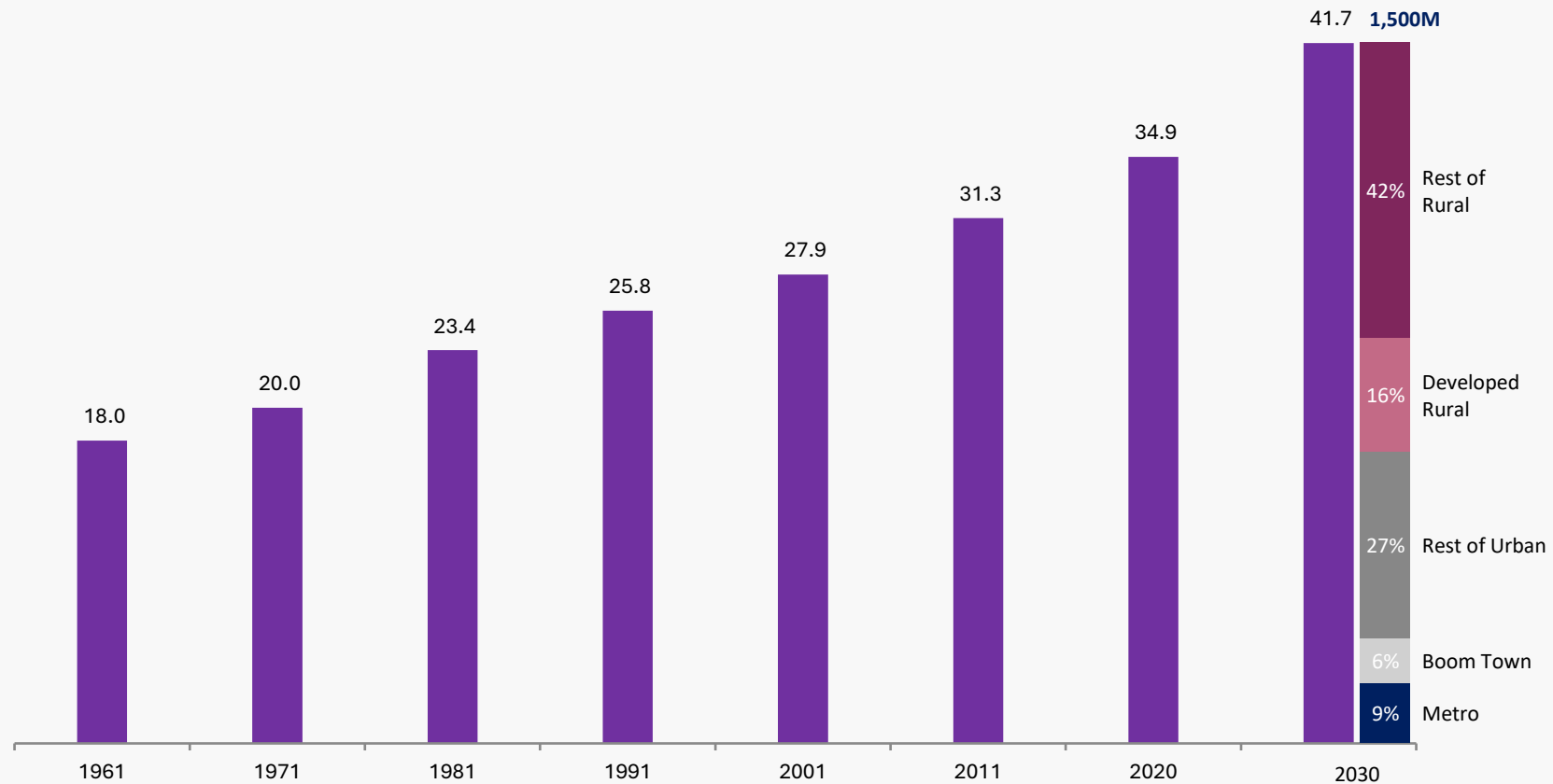
LONG TERM INVESTMENT THEME

Long Term Investment Theme is consumption driven aided by increase in spending power, higher working age population and urbanization



INCREASING URBANIZATION IN INDIA (%)

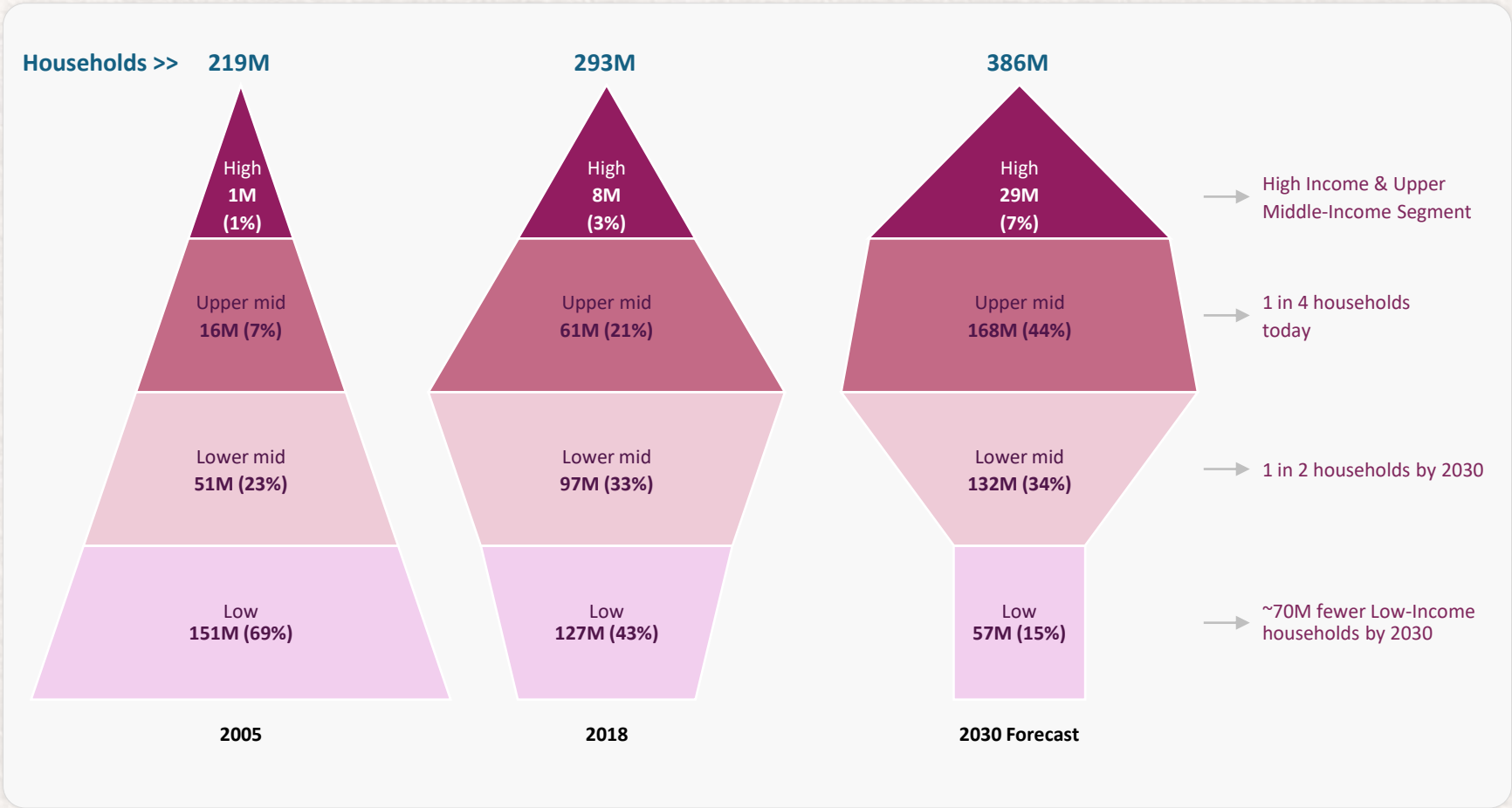
Urban infra and household consumption goods will be required to support rise in urbanization – expected to reach 42% in 2030



Source: National Infrastructure Pipeline Document of GOI
& World Economic Forum / Bain & Co – “Future of consumption in fast growth consumer markets – India”

BALLOONING MIDDLE- & HIGH-INCOME CLASS WITH A GREATER ABILITY TO SPEND

Upper middle & high-income proportion increasing from 24% in 2018 to 51% in 2030



Source: World Economic Forum / Bain & Co – “Future of consumption in fast growth consumer markets – India”

GREATER DISPOSABLE INCOME INCREASES VALUE ADDED SPENDING

With rise in income levels, spending on household products, health, travel and leisure increases



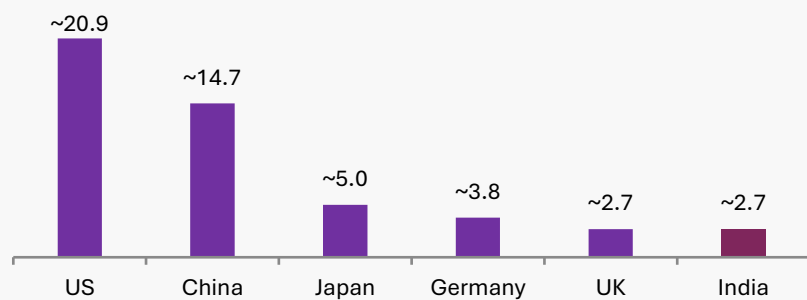
Source: Internal Research

E-COMMERCE IS HERE TO STAY AND GROW

India has the Third-highest number of e-retail shoppers (only behind China and US)

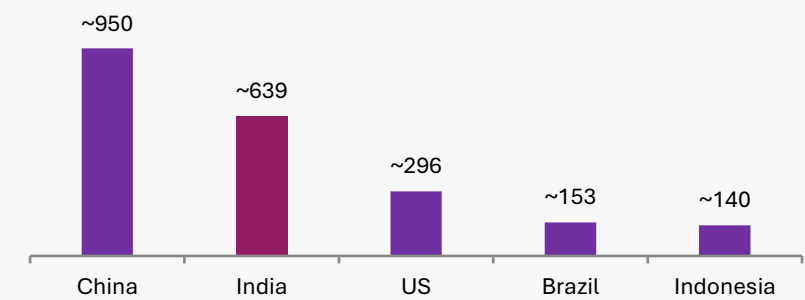
6th Largest Economy

Nominal GDP (\$trillion) (2020)



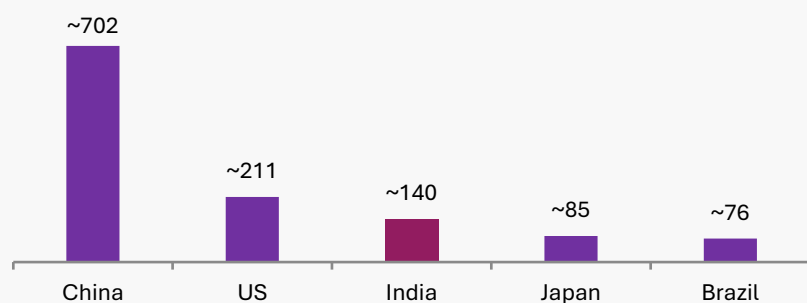
2nd Most Internet users

No. of Internet users (million) (2020)

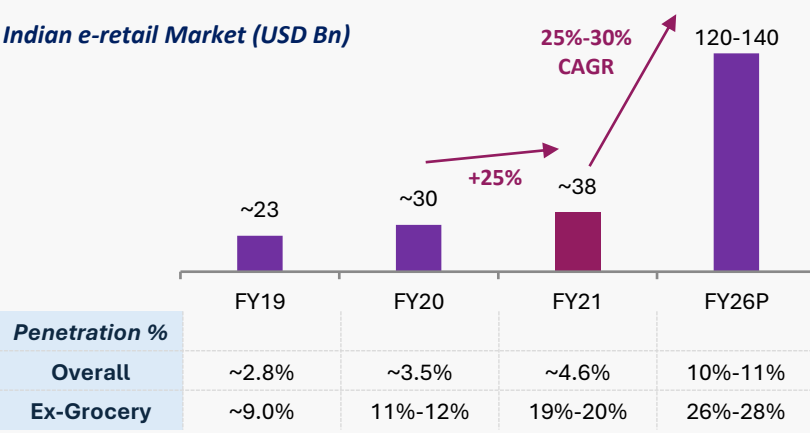


3rd Most e-retail shoppers

No. of e-retail Shoppers (million) (2020)



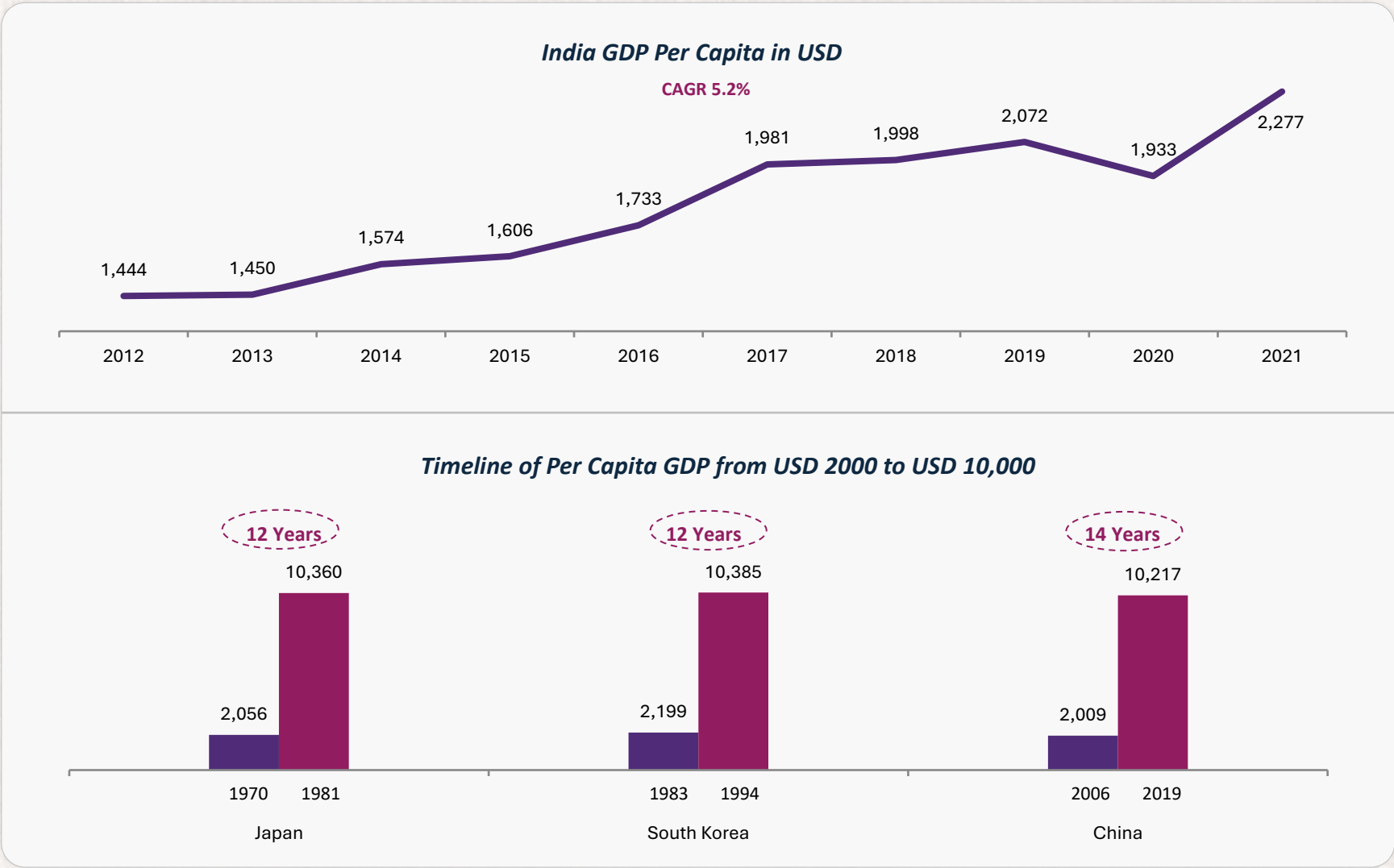
Indian e-retail Market (USD Bn)



Penetration %	FY19	FY20	FY21	FY26P
Overall	~2.8%	~3.5%	~4.6%	10%-11%
Ex-Grocery	~9.0%	11%-12%	19%-20%	26%-28%

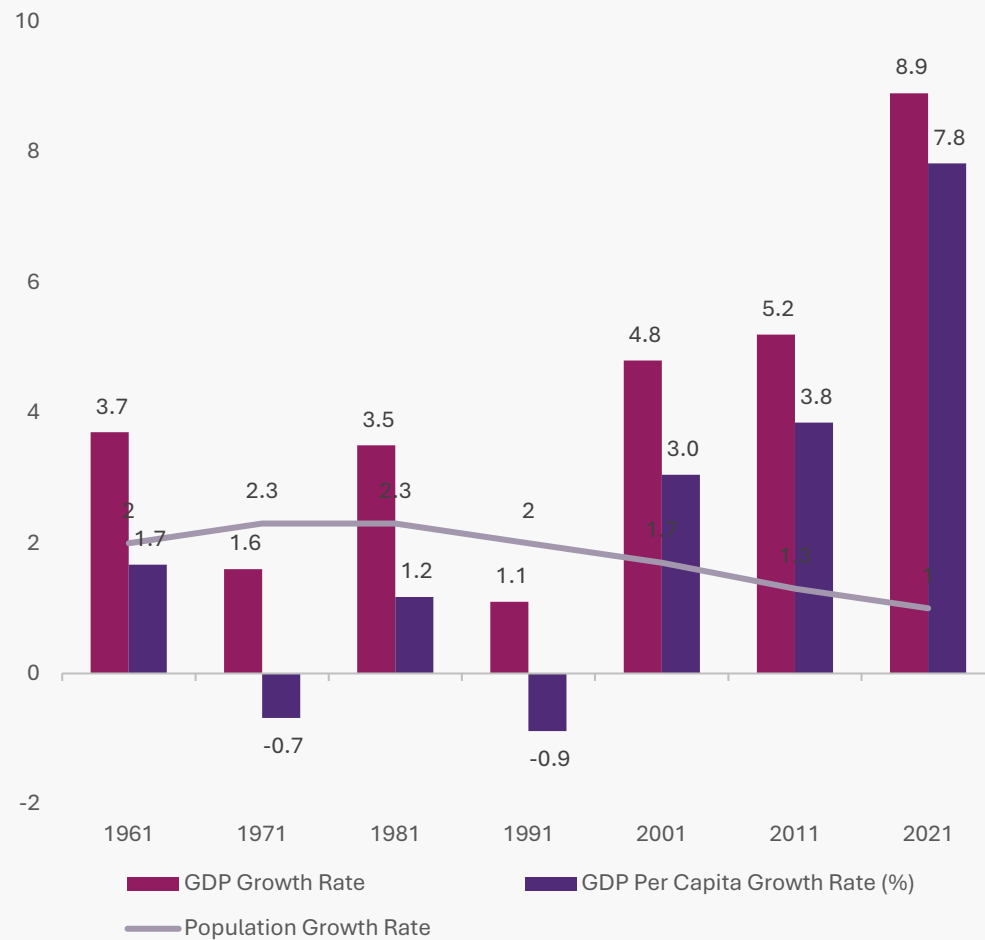
Source: "How India shops online – 2021" – report by Bain & Co

INDIA PER CAPITA GDP – CROSSING USD 2000 CAN BE AN INFLECTION POINT



Source: pib.gov.in, imf.org

GDP PER CAPITA GROWTH RATE – CATALYST FOR CONSUMPTION

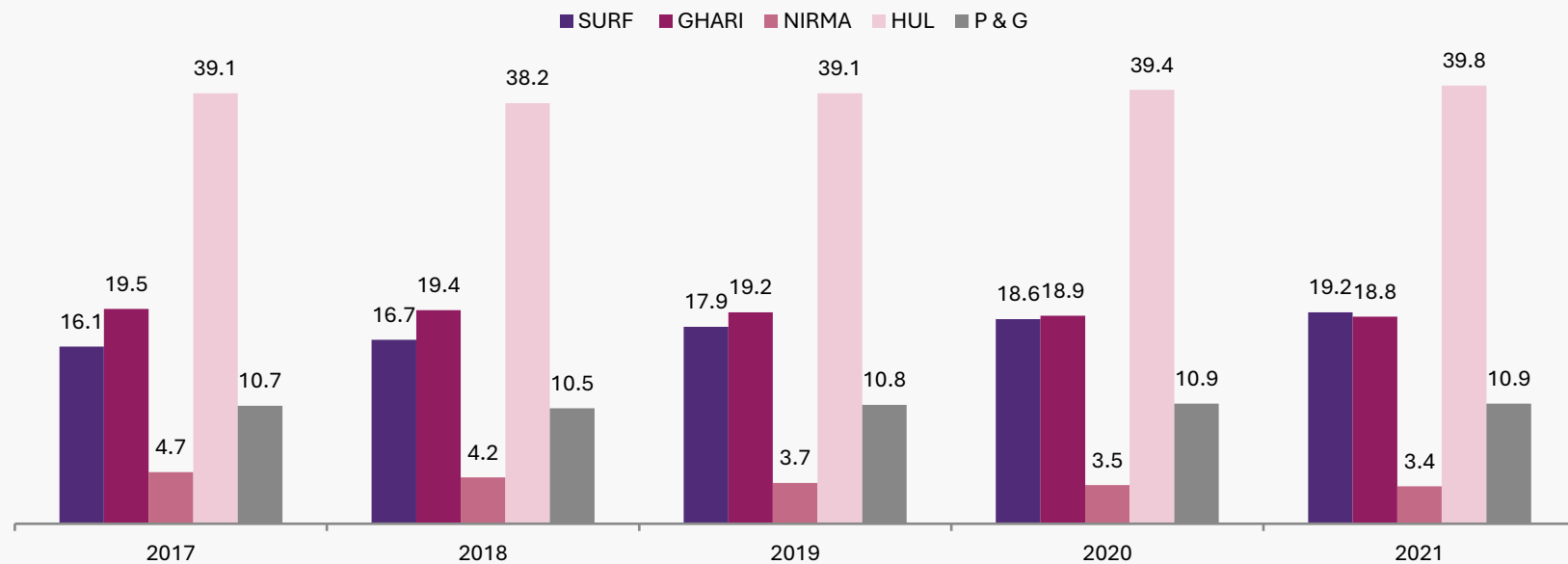


The GDP per capita growth rate has been improving over the last 3 decades due to higher GDP and reducing growth rate of population.

Assuming GDP growth rate at 6.5% till FY20230 and population growth rate of 1%, GDP per capital would nearly double to USD 4000 by 2030.

Source: pib.gov.in, mospi.gov.in, rbi.org.in

PREMIUMIZATION – MIRAGE OR A REALITY

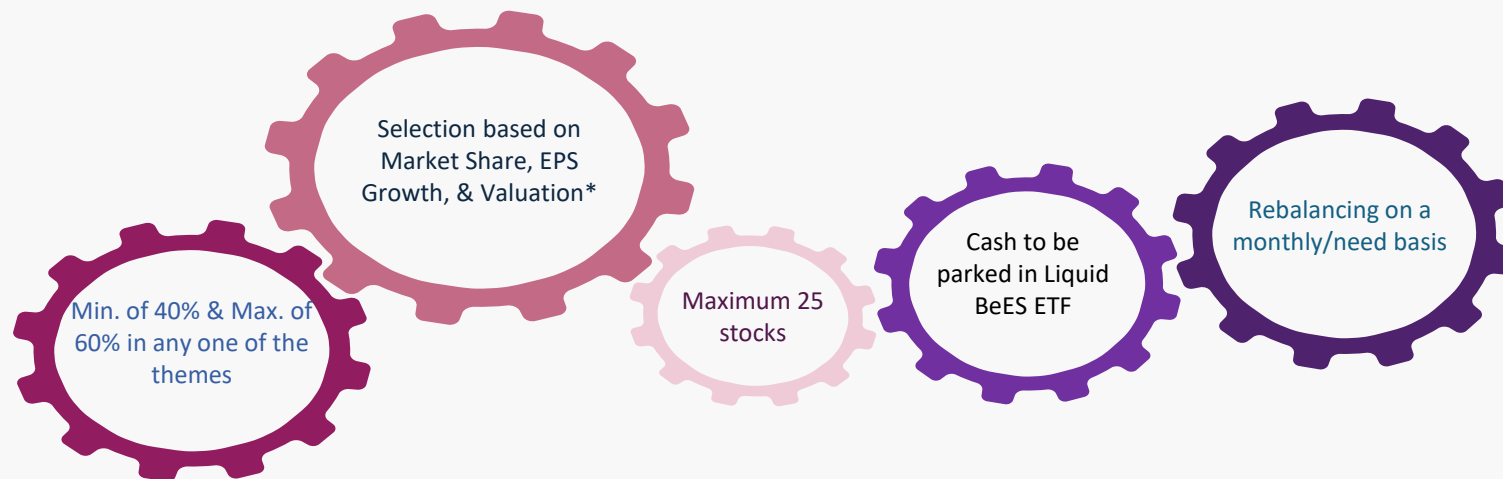


Surf Excel – largest brand in HUL portfolio at INR 60 bn approximately.

- *Product quality and brand perception matters.*
- *Surf had to introduce Wheel to counter Nirma (launched in 1985). Pricing was the key differentiator then.*
- *Last decade Surf Excel overtook Wheel and other company brand – Ghari (largest brand in detergent category from 2012 till 2020).*
- *Despite pricing premium, Surf Excel is gaining market share.*
- *Increasing income levels with urbanization can lead to higher adoption of premium products.*

Source: reserachgate.net, hul.co.in

PORTFOLIO CONSTRUCTION



The portfolio has companies from any or all the following categories:

- *A clear market leader with a dominant market position and expected to remain competitive in the foreseeable future*
- *A strong contender is defined as the company apart from number one, that has grown faster and/or is expected to grow faster in earnings compared to peer set over the next 2 years*
- *A dark horse is a company, other than a market leader, which is capable of disproportionately benefitting from the way the industry is shaping up.*

**Equity allocation to have a maximum of 25% weightage as exception to overall portfolio construction criteria for stock selection based on portfolio manager discretion at any given time.*

ENTRY AND EXIT STRATEGY

Entry Strategy

- Display a ratio of PEG (PE Multiple to Estimated Growth) of not more than 1; or
- Have a relative PE* that is not more than 1 standard deviation compared to its 5-year average; or
- Have a valuation ratio that is not more than 1 standard deviation compared to its 5-year average.

Exit Strategy

- If the assumption with which the stock was bought becomes invalid for some reason, or
- If a stock has crossed a PEG ratio of 2.5x, and
- If a stock has a relative PE that is more than 1 standard deviation compared to its 5 year average, and
- If a stock has a valuation ratio that is greater than 1 standard deviation of its 5-year average, or
- We find a superior investment opportunity.

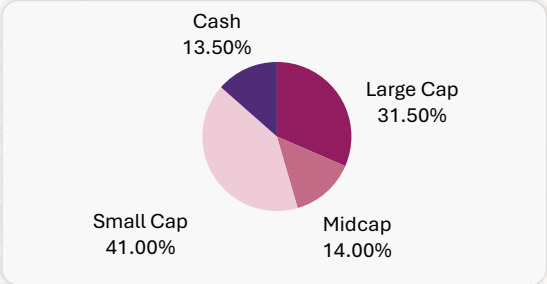
** Relative PE is the ratio of the individual company's PE multiple to the multiple of the market index. This method takes into account the average premium (or discount) the individual stock has enjoyed vis-à-vis the entire market.*

GROWTH OPPORTUNITIES PORTFOLIO (GOP) SNAPSHOT

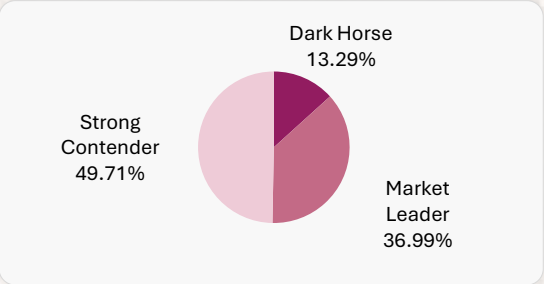
Characteristic	EPS(E) CAGR (2025 to 2027)	PER to Earnings Growth Ratio	Avg. Market Cap (INR Bn)	Sectors with highest weight
① Portfolio	28.04%	1.13	1,380	Automobile & Ancillaries
② BSE 500 TRI*	11.33%	2.30	785	Chemicals
				Realty
				Capital Goods
				Textile

Date Source: Bloomberg & Ace Equity; Data as of 31st August 2025. *Benchmark is BSE 500 TRI, the portfolio is spread across different market capitalization, hence BSE 500 TRI is chosen as benchmark. Sectors as defined in Ace Equity. Internal estimate is taken wherever EPS estimates from Bloomberg is not available.

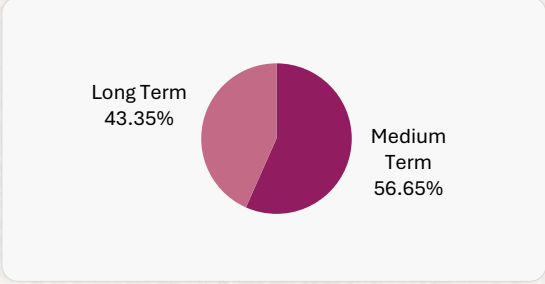
Market Cap Allocation



Category Allocation*



Theme Allocation*



Market cap, Category & Theme allocation as on 31st August 2025. *Category & Theme Allocation has been re-based to be considered as 100% equity. Source: Ace Equity

Performance as on 31st August 2025

Name	GOP	BSE 500 TRI
1Month	-4.05%	-1.75%
3 Months	-2.47%	-0.89%
6 Months	15.28%	13.62%
1 Year	-10.55%	-4.71%
2 Years	7.33%	15.96%
Since Inception(16/11/2022)	9.50%	14.51%

The current portfolio holdings may or may not be a part of the future portfolio holdings and may or may not be part of all clients' portfolios. Unaudited Performance data for Portfolio Manager and Investment Approach provided hereunder is not verified by any regulatory authority and Past performance may or may not sustain in the future. The performance is based on TWRR as on August 31st, 2025. Inception Date is 16/11/2022. As per SEBI guidelines, the performance data provided is net of all fees & expenses (pre-tax), based on their period of investment, fee structure and point of capital flows. Please note that performance of your portfolio may vary from that of other investors and that generated by the Investment Approach across all investors because of; 1) the timing of inflows and outflows of funds; and 2) differences in the portfolio composition because of restrictions and other constraints. As per SEBI circular SEBI/HO/IMD/IMD-PoD-2/P/CIR/2022/172 dated December 16, 2022, the comparison of the relative performance of the investment approach with other portfolio managers is available at <https://www.apmiindia.org/apmi/IACompare.htm?action=iacomaprepape>. Source: Ace Equity, Bloomberg, BSE, Internal.

TERM SHEET

1	Portfolio Managers
	BugleRock Capital Private Limited (Formerly known as o3 Securities Private Ltd.)

2	Investment Vehicle
	SEBI Registered Portfolio Management License (PMS)

3	Auditor
	M P Chitale & Co.

4	Custodian
	HDFC Bank/Kotak Bank

5	Benchmark
	BSE 500 TRI

6	Suggested Investment Horizon
	Minimum of 3 years

7	Stocks in the Portfolio
	20-25 Stocks (No market cap bias)


8	Cash Strategy
	Residual

9	Management Fee	Regular Plan	2.50% p.a. fixed OR 2% p.a. fixed with 15% profit sharing on positive alpha over benchmark**
		Direct Plan [#]	1.5% p.a. fixed OR 1% p.a. fixed with 15% profit sharing on positive alpha over benchmark**


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**** The Fee is charged on the daily average AUM; debited on a quarterly basis, profit sharing fee is charged annually or on exit. Fees exclusive of GST & third-party charges like Audit fee & Custodian Fee.**

CONTACT DETAILS


www.buglerock.asia

Follow us:


pmsassist@buglerock.asia


BugleRock Capital

Mumbai

No. 802, 8th Floor, South Annexe,
Tower 2, One World Center,
Senapati Bapat Marg,
Lower Parel, Mumbai 400 013
Tel: +91 22 6925 1000

Bangalore

Prestige Takt, 1st Floor,
No 23, Kasturba Road Cross,
Mahatma Gandhi Road,
Bangalore, Bangalore North,
Karnataka, India, 560001

Chennai

Awfis Rajkamal Pinnacle,
Old No. 145, New 2, 7th Floor,
Nungambakkam High Road,
Nungambakkam, Chennai 600034

Hyderabad

Floor 3, Cabin 324, Road No 36,
Plot No 1202 & 1215A,
SL Jubilee, Jubilee Hills,
Hyderabad - 500 033
Tel: +91 98481 94249

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Redressal of client grievances: Investors can seek clarification for their queries and are further entitled to make a complaint in writing, verbally or telephonically. An email may be sent to: For PMS queries and complaints – pmsassist@buglerock.asia and compliance@buglerock.asia (both). Alternatively, the Investor may call on +91 22 6925 1000. SEBI Complaint Redressal Portal (SCORES): <https://scores.sebi.gov.in/>

In case, if the same is not resolved or he/she is still not satisfied with the resolution, they can opt for online resolution of dispute through Conciliation/Arbitration on SMART ODR Portal at: <https://smartodr.in/login>. Portfolio Management Services: You may refer the Disclosure Document available at <https://www.buglerock.asia/assetmanagement/Buglerock%20Capital%20-%20Disclosure%20Document-22-01-2025.pdf> for detailed disclosures. As per SEBI circular SEBI/HO/IMD/IMD-PoD-2/P/ CIR/2022/172 dated December 16, 2022, the comparison of the relative performance of the investment approach with other portfolio managers is available at <https://www.apmiindia.org/apmi/welcome.htm>

Principal Officer and Compliance Officer Details under PMS:

Principal Officer: Mr. Rajesh Keswani, Tel: +91 22 6925 1000, Email id:- rajesh.k@buglerock.asia

Compliance Officer: Mr. Bharat M Sharda, Tel: +91 22 6925 1000, Email Id:- bharat.sharda@buglerock.asia

Corporate Office Address:- 8th Floor, Unit 802, South Annexe Tower 2, One World Center, Senapati Bapat Marg, Lower Parel, Mumbai, Maharashtra, 400013

Registered Office Address:- Prestige Takt, 1st Floor, No. 23, Kasturba Road Cross, Bangalore 560001, T: +91 80 6902 9000

Thank You

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