

# Equirus Core Equity



## Our Investment Strategy

Equirus Core Equity is based on the investment philosophy of “Profitable Growth and Longevity at a Reasonable Price.”

- Profitable – High ROCE & ROE Business; Ability to grow without large amounts of capital
- Growth & – Large size of opportunity and runway for growth
- Longevity at a – Sustainable competitive advantage over medium to long term
- Reasonable Price – Available at a price below its Intrinsic value in order to generate Alpha.

## Recorded an Exceptional Performance since Inception



Duration	1 M	3 M	6 M	1 Y	Since Inception (27-May 2022)
<b>Equirus Core Equity</b>	-0.70%	5.57%	5.26%	26.35%	21.81%
<b>S&amp;PBSE500TRI</b>	1.92%	17.88%	16.20%	33.42%	25.36%

<https://www.apmiindia.org/apmi/welcomeiaperformance.htm?action=PMSmenu>

**Note:** Return figures are post fees and as of Jan 31st, 2024. Return data disclosed above in the table is TWRR.

**Disclaimer:** Return data is net of fees and is calculated as per TWRR method as specified in the SEBI regulations. TWRR is calculated based on daily valuation of all the clients. This may differ from individual client return as return of Investment Approach is combined for all the clients. Performance related information provided herein is not verified by SEBI. Trading and investments in equities are subject to market risk, there is no assurance or guarantee of the returns, it will be purely a target return rather than guaranteed return. Please read the Disclosure Document carefully before investing.

## Masterminds behind the Stellar Performance



**Gaurav Arora**

Vice President - PMS  
Equirus

- **10 years** of experience in the equity markets with excellent track record in investing.
- Previously with Aventus Wealth Management managing client portfolios; beat benchmarks by a wide margin. Worked with Kotak Institutional Equities prior to that.
- MBA from IIM Calcutta and Mechanical Engineering from BITS-Pilani

## Awards & Recognitions



Awarded **Rank 1** in 5-year Performance in Small-cap Category- 2024 by PMS AIF WORLD



Awarded **Rank 1** in 5-year Performance across **All Categories** by IIM Ahmedabad and PMS AIF WORLD



Awarded as the **Best Performing Fund in Small and Mid-cap Strategy** for a Three-Year period by CRISIL and PMSBAZAAR



Awarded **Rank 3** as the **Best Performing Fund in Small and Mid-cap Strategy** by CRISIL and PMSBAZAAR

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