



March 2025

Prescient Investments Global Presentation, CIO Varun Madan



Company Profile:

Prescient Investments Global has proprietary investments to capitalize on the multitude of investment and trading opportunities in India's public equity markets. Selective early-stage private capital opportunities are also evaluated. Investment consultancy services of customized investment advice offered as well as India Entry Strategies.



Varun Madan, Chief Investment Officer and Founder

Varun Madan is the Chief Investment Officer and Founder of Prescient Investments Global, with over a decade of experience in investment research, securities trading, and working with institutional and high-net-worth clients. His expertise spans equities and traditional and alternative assets globally. As CIO, he leads Investment Consulting and Advisory for firms and family offices, specializing in equity research, portfolio management, investment manager selection, and management of the team.

Previously, Varun worked as Senior Investment Specialist at Invest India, focusing on banking, financial services, and sports infrastructure. He also served as a strategic advisor for ThroughPut AI, an industrial AI startup in San Francisco. Varun has held positions in investment firms and hedge funds in Toronto and India, including Royal Capital, Black Swan Dexteritas, Metis Capital Management, and Client Associates. He began his career as an Equity Derivatives Sales Trader at JM Financial.

Varun holds an MBA from Rotman School of Management, University of Toronto, and a Bachelor of Science in Economics with a concentration in Finance from Wharton, University of Pennsylvania. Outside of work, he enjoys reading motivational books, fitness training, sports, meditation, poker, and traveling internationally.

Prescient Investments Global Product Offering & Performance

The background of the slide is a composite image. It features a world map in the center, overlaid with a grid. To the right, there is a city skyline with several skyscrapers. In the foreground, there are several financial charts and graphs. A prominent white arrow points diagonally upwards from the bottom left towards the top right. There are also red and orange candlestick charts and line graphs. In the top right corner, the word "Index" is visible next to a green upward-pointing triangle and the number "1.30".

Public Equities Capabilities for Family Offices, Businesses & High Net Worth Individuals (Research & Advisory)

Advisory Services on Existing Client Portfolios and New Capital Allocation

1. Fee Based Client Consultations on Existing Client Portfolios and recommendations on holdings
2. Management Fee of Assets Under Advisory for constructed Public Equities Client Portfolios
3. Performance Carry Fee over suitable hurdle rate

**Please get in touch for more details*

Direct Equity Investment Strategy Research and Advisory (Large Caps, Mid & Small Caps)

1. Market & Thematic Sector/ Industry Analysis
2. SWOT and Competitive Analysis Assessments
3. Proprietary Multi-Factor Models
4. Proprietary Screening & Quantitative Fundamental Due Diligence
5. CIO Notes and Macro Assessment
6. Investment Memos Pitch Deck (Note)
7. Financial Analysis & Benchmarking
8. Valuation Models
9. Model Portfolios Construction

External Investment Manager Selection (PMS/AIFs/HFs/MFs)

1. Pipeline of Sourcing Funds across alternative investment universe of PMS/AIFs/Hedge Funds/Mutual Funds
2. Clear Detailing of Client Investor Profile in Client IPS mandate
3. Screening Calls and Meetings with Investment Managers in line with Client IPS mandate
4. Performance Assessment using in house checklist
5. Documenting Investment Memos for evaluating External Investment Managers
6. Model Portfolio Construction

- **Prescient Portfolio has compounded for nearly a decade at ~ 19% vs. Index ~ 14%**
- **Prescient 2023 Performance (Jan – Dec 2023): 30.33% vs. Index 19.33%**
- **Prescient 2024 Performance (Jan – Dec 2024): 16.99% vs. Index 8.83%**

Investment Research Process



Secular Long-Term Structural Themes & Tailwinds

Financial Access

Energy

Premiumisation

Infrastructure

Consumerism

Automotive

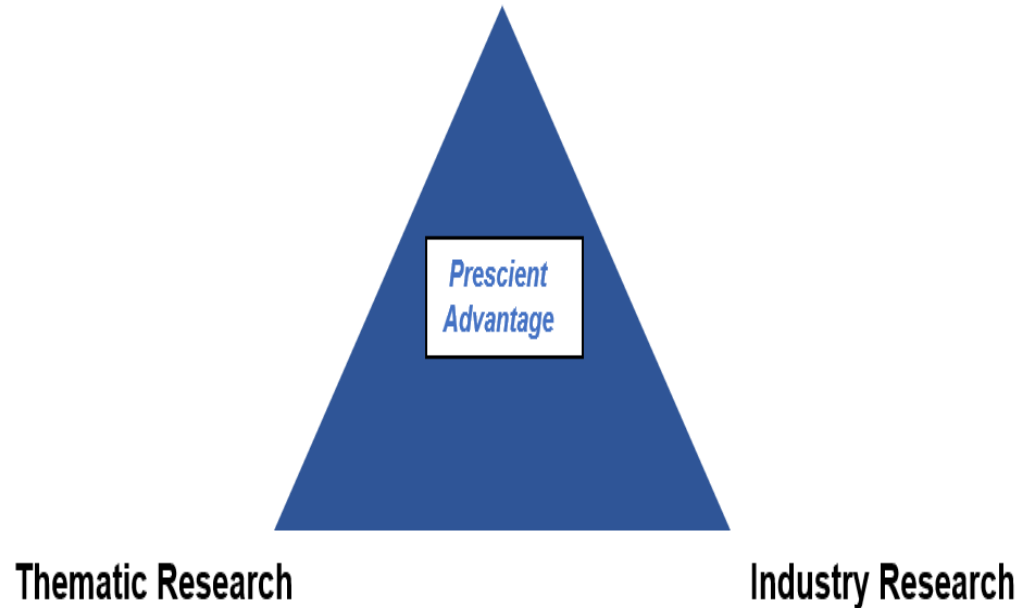


Accessibility

Digitization & AI

Prescient Investments Core Investment Portfolio Investment Process

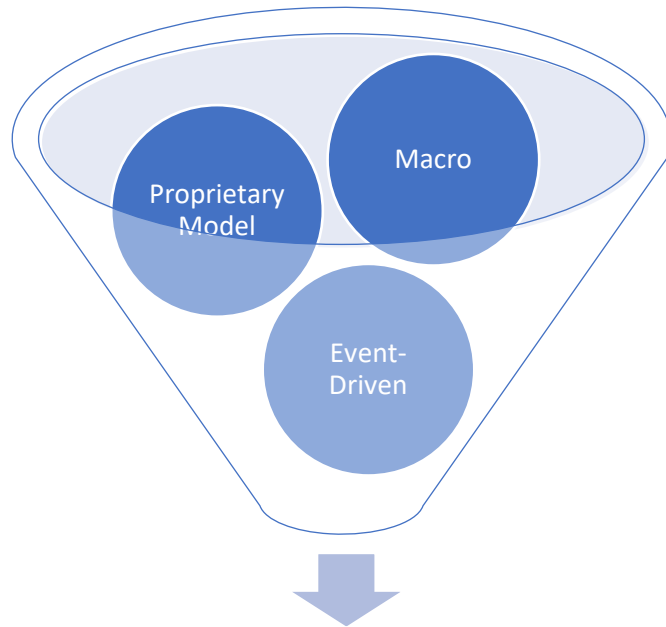
Fundamental Company Research (Quantitative + Qualitative)



- Combination of fundamental, thematic and industry research to evaluate and own high quality businesses with
 - a multi capitalization focus
 - strong business models
 - are run by capable management teams with a demonstrated track record of growing shareholder wealth.
- These businesses ideally are
 - in structurally high growth industries with revenues and earnings that compound over the long-term outpacing GDP,
 - cash generative and exhibit consistently high ROEs with low net debt and leverage.
- Net Intrinsic Valuation Assessment to purchase businesses at substantial margins of safety to intrinsic valuation
- Earnings Quality & Consistency, Profitability, Revenue Growth
- Multi-Factor Proprietary Models on Long-Term Momentum, Price Volatility Characteristics and Risk-adjusted Performance Ratios as measured by Sharpe, Sortino and Information Ratios

Prescient Investments Tactical Opportunistic Trading

“It’s not whether you are right or wrong that’s important but how much money you make when you are right and how much you lose when you are wrong” – George Soros



Prescient Tactical Trading

- Derivatives (Futures + Options) *to hedge portfolio* only when necessary and also opportunistically trade depending on client preference
- Tactical trades with high reward-risk characteristics based on a system-driven model.
- Only utilized on large cap Nifty Index and stocks which have the most liquid derivative contracts.
- Proprietary trading model is a technically data driven momentum system that draws inputs on price, volume, volatility parameters, as well as scenario analysis.
- Macro News and Event Driven approach used in conjunction.
- Filtration and ranking method is utilized to select Best of Breed Trades with strict risk limits observed to give highest probability of consistent success on an average



IS PROUD TO PRESENT

VARUN MADAN

FOUNDER & CHIEF INVESTMENT OFFICER,
PRESCIENT INVESTMENTS GLOBAL

AS ONE OF THE

Top 10 Chief Investment Officers - 2024

This is an annual recognition that showcases exceptional leaders & professionals in the investment department of an organization who guide the organization to its future by setting benchmarks across different key parameters.

A handwritten signature in black ink.

Sujith Vasudevan
Managing Editor

Prescient Investments Global Disclaimer

Prescient Investments Global (“Prescient”) operates as a family office and investment consultant, providing research, analysis, and advisory services. Prescient does not provide investment, legal, or tax advice, nor does it act as a registered investment advisor, broker-dealer, or fiduciary.

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Investors are strongly encouraged to conduct their own due diligence and consult with qualified financial, legal, and tax professionals before committing capital.

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Hours

Open today 09:00 am – 05:00 pm ▾

Monday - Friday: 9am - 5pm

Saturday - Sunday: By appointment