



March 2025

Prescient Investments Global Presentation, CIO Varun Madan



Invest with Confidence.  
Prescient is the Answer.



Prescient Investments Global partners with you in your financial goals of Compounding Wealth sustainably through Capital Preservation and Growth.



*Invest with Confidence. Prescient Investments Global partners with you to Compound Your Capital Sustainably to give you Peace Of Mind - with Your Capital In Your Hands.*





# Prescient Investments Global Product Offering & Performance

The background of the slide is a composite image. It features a world map in a light blue, wireframe style. Overlaid on the map is a large, thick, yellow arrow pointing diagonally upwards from the bottom left towards the top right. In the upper right corner, there is a small section of a financial chart with the word 'Index' and some numbers. The bottom right corner shows a blurred image of a city skyline with several skyscrapers. The overall color palette is dominated by blues, greys, and the bright yellow of the arrow.

## 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 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

Consumerism

Infrastructure

Automotive

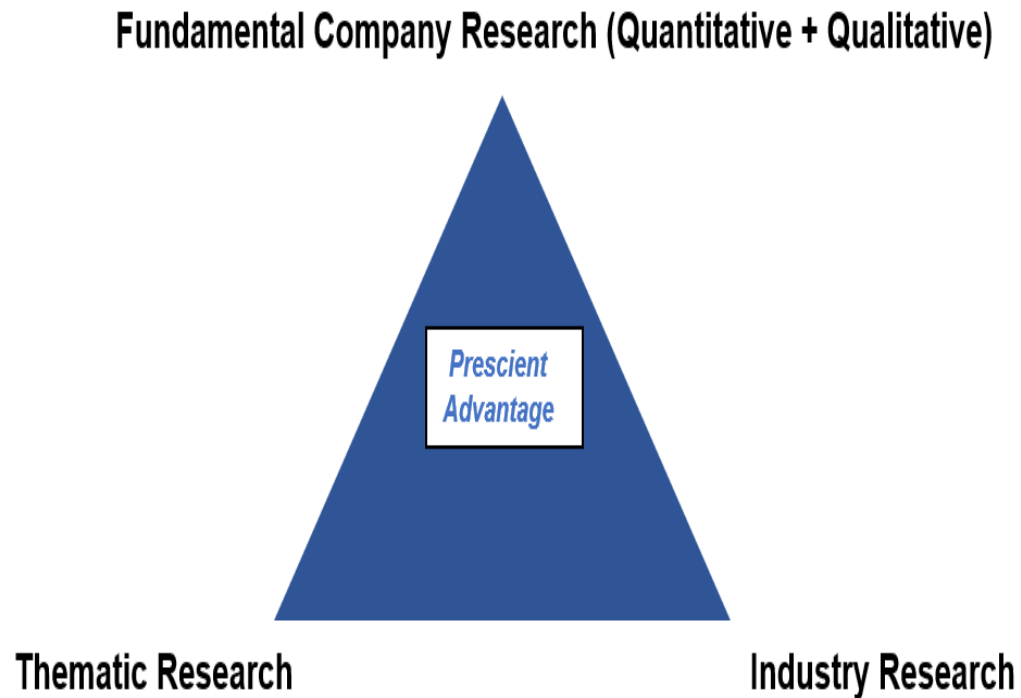


Accessibility

Digitization & AI



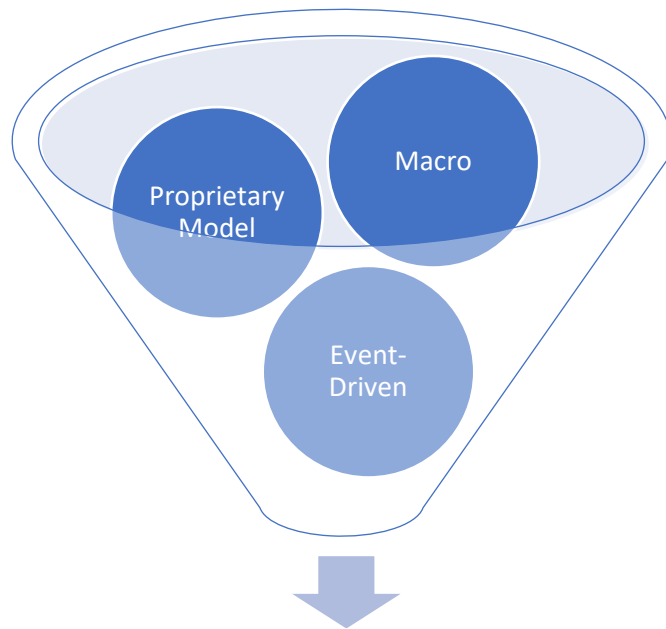
## Prescient Investments Core Investment Portfolio Investment Process



- 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, appearing to read "Sujith".

**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.*

*All investments are subject to potential market risk, including the potential loss of principal. Market conditions, economic factors, and unforeseen events can impact investment performance. Past performance is not indicative of future results.*

*Investors should carefully review all relevant documents, disclosures, and risk factors before making any investment decisions. Nothing in this material constitutes an offer to buy or sell any financial instrument or a recommendation to invest. Prescient is not responsible for any investment decisions made based on its insights or materials.*

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



# Contact Us

Contact Email: [varun.madan@prescientinvestmentsglobal.com](mailto:varun.madan@prescientinvestmentsglobal.com)

## **Prescient Investments Global**

New Delhi | Toronto

### **Hours**

Open today 09:00 am – 05:00 pm ✓

Monday - Friday: 9am - 5pm

Saturday - Sunday: By appointment