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OmniScience Capital

Scientific Investing Framework - Uncovering **Hidden** Growth Vectors

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Omniscience Investment Adviser
Division of Omniscience Capital Advisors Pvt. Ltd.

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2023 – Setting the Foundation

Recession that Never Came

- Rising Interest rates scenario in the US (4 rate hikes) & India (1 rate hike)
- Strong GDP Growth – Q2 growth came at 7.6% vs. RBI estimate of 6.5%, US Q3 GDP Growth at 5.2%
- US GDP growth ~3% reached \$26.24tn, India GDP growth ~7%+
- Moderate inflation number setting the stage for lower interest rates & Growth

Macros

Key Sectors

Markets

Infra Push

- Budget Capital Expenditure increase by 37.4% to 10 lakh crore
- Defence export target for FY2023 achieved
- Aatmanirbharta in Defence – 3.4 lakh crore order approval with 98% domestic sourcing to acquire LCH and LCA among other things vs. 1.6 lakh crore outlay as per budget 23
- Railway Infra: Vande Bharat trains tenders & Orders of ~300 train sets
- One of the largest wagon orders in works of ~60,000 wagons

Markets Review

- Mid & Smallcaps outperformed Largecaps
- Power Sector Vs Power Vector
- Infra Sector Vs Infra Vector (Rail)
- IT Sector Vs IT Vector

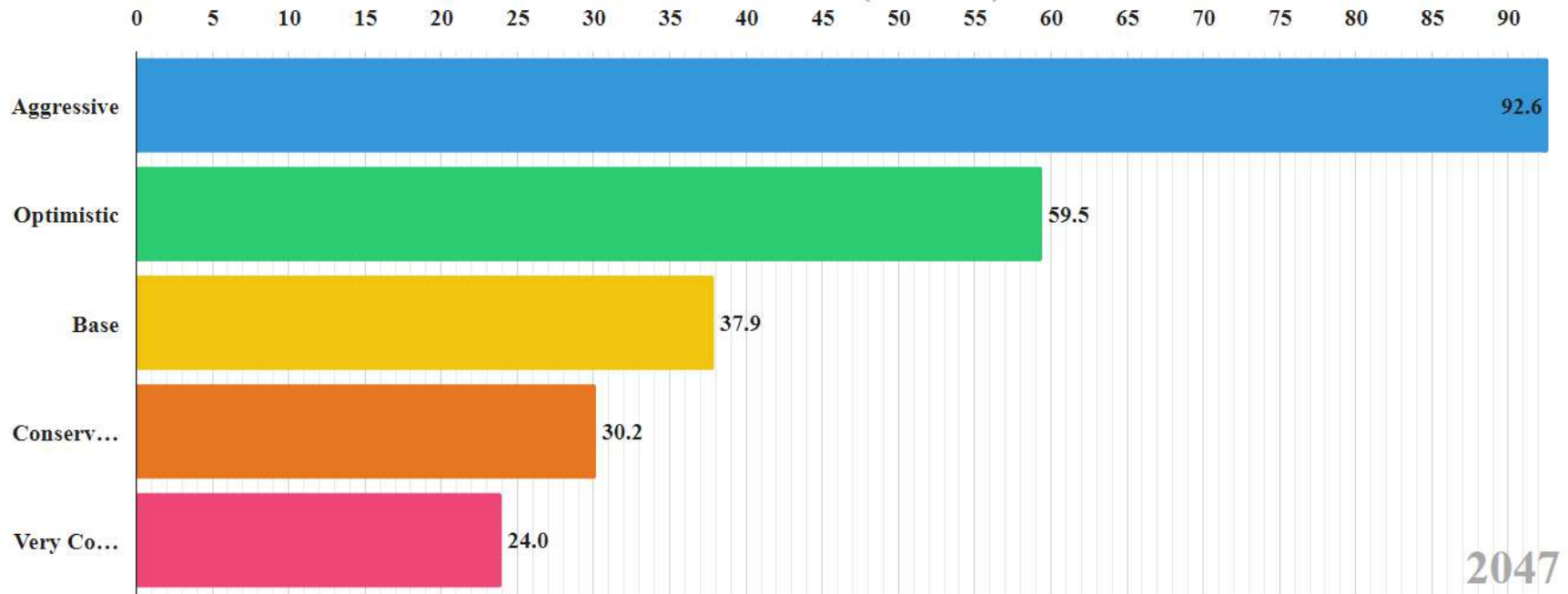


A \$50+ trillion economy by 2047 (Samvat 2104)

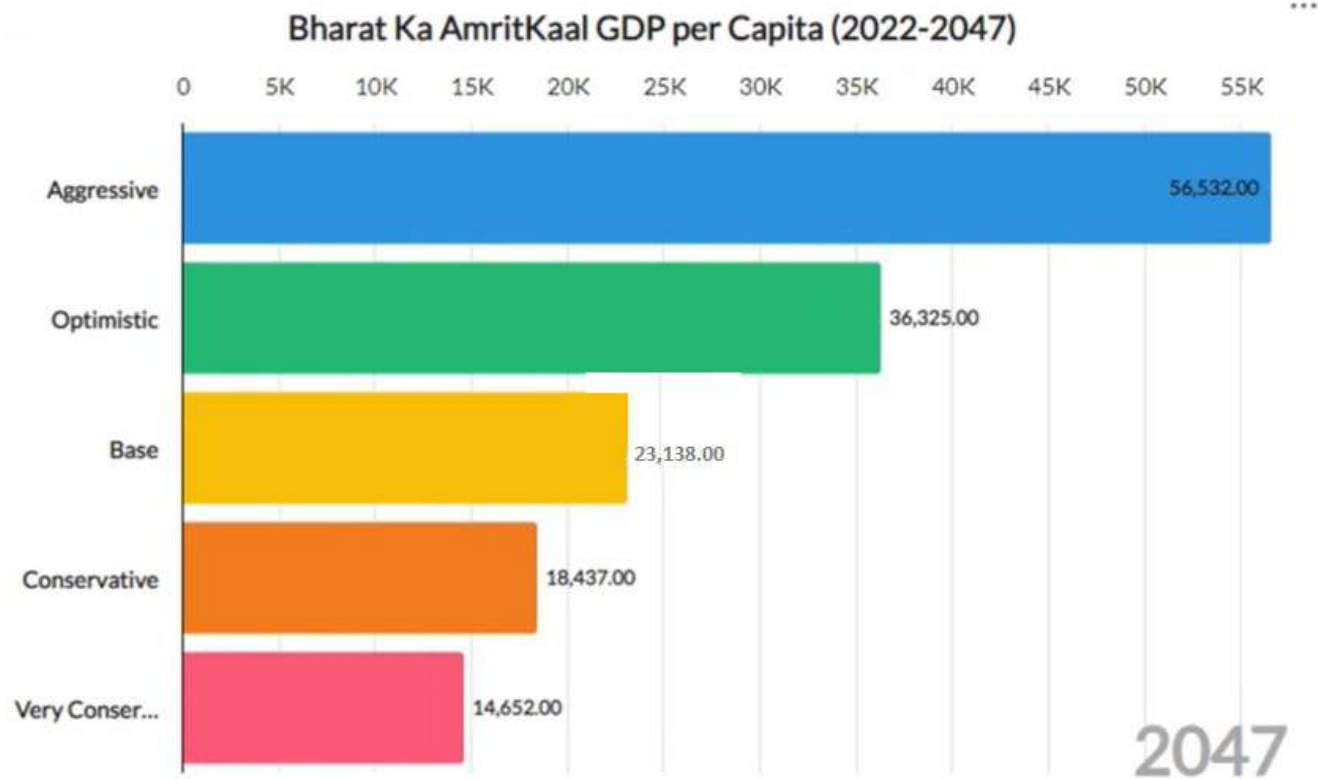
Will India be No.1 or No.2 Economy by 2047?

Bharat AmritKaal GDP (2022-2047)

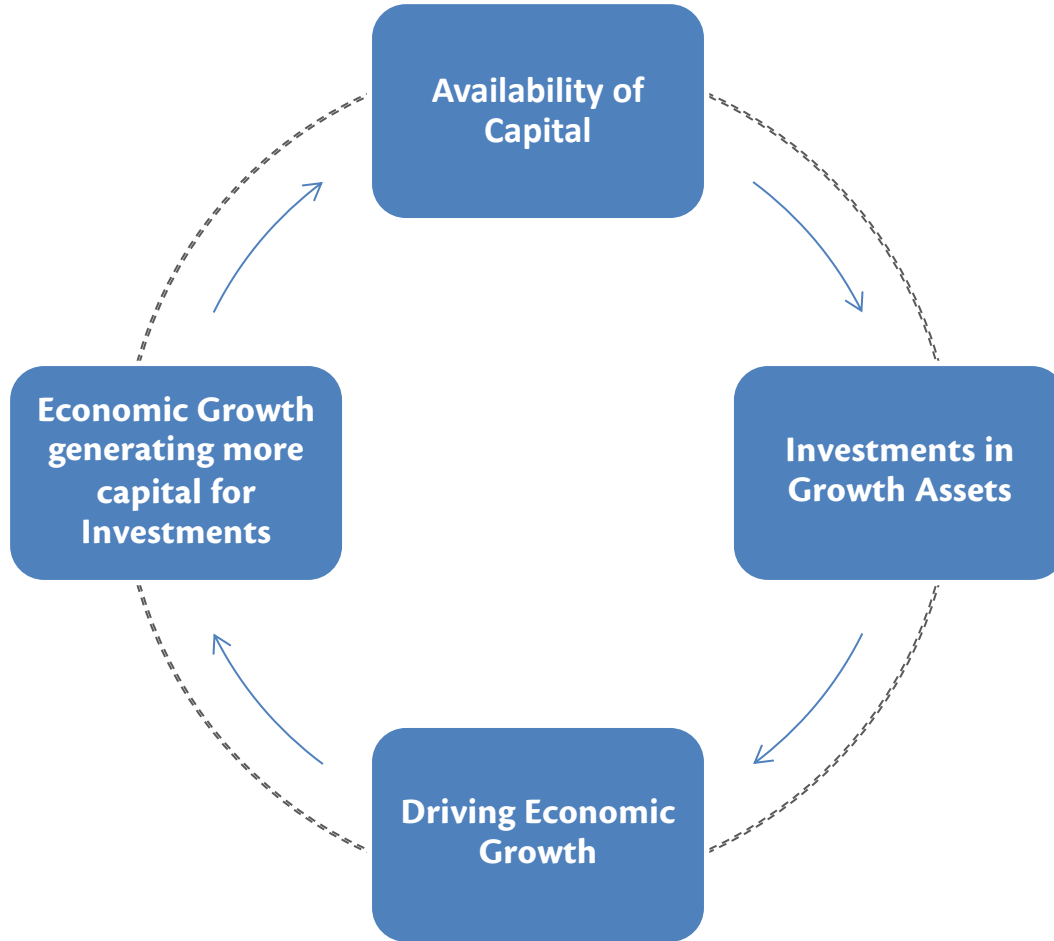
Nominal GDP (\$ Trillions)



Bharat to be a Developed Economy before 2047



Sustainable Growth Virtuous Cycle



Sources of Funds

- Advance Tax: 20% up Apr-Dec 24
- GST Collection: up 11% Apr-Nov FY24
- Exports: Touch \$1 trillion by 2024-25
- Central Govt. debt: 15% Higher
- Gross Capital Formation

Government

Private Sector

Foreign Investments

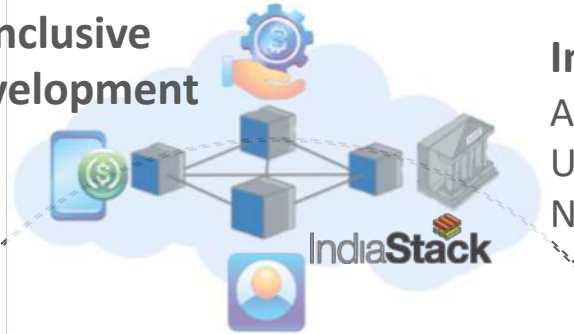


- Banks CRAR: Record high level of **17.1%**
- Banking Sector: GNPA at 10yr low of 3.9%
- Corporate D/E ratio ~**60%**, a multi-yr low
- IPO: 54 IPOs till Dec 23, ~50,000 Cr raised
- Corporate Bond Issuance – 4.9 lac crore raised in H1FY24, up 54% YoY
- Bank credit growth of 15%
- PMI Index in growth territory of 55.3 to 58.7 in the last 12 months

- FDI last five years (FY19-23) averaged at \$75 billion - a 45% growth over the previous period (FY14-18)
- FII – 2.46 lac crore inflows in FY24 till date compared to 1.63 lac crore outflow in the last two years.
- Inclusion in Global Bond Indices - Additional 30-40 billion inflows

Investments in Growth Assets

Inclusive Development



India Stack

Aadhar | eKYC | Jandhan
UPI | IMPS | Digilocker
NDHM | ONDC | OCEN



Gati Shakti/ NLM

Railway Infra | Green Mobility
Bharatmala | Sagarmala
IMEEEC | INSTC



Productivity Enhancement

Digital Transformation | AI
Demographic Dividend | PLI
(Sunrise Sectors) | GST
| Defence | Aatmanirbharta
Mission

Financing Of Investments

Fiscal Expenditure | De-levered Balance Sheets | International Fund Flows | IFSC GIFT City

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Driving Economic Growth



UPI Transactions

• Up 54% up and transactions amount is up 46% in Nov23 YoY (NPCI)

Ecommerce

• GMV Numbers P23.5% growth in FY23 in annual GMV

Power Consumption

• Apr to Nov 23 power consumption grew by 10.2% YoY

Airline Travel

• 20% growth at 75.4 million passengers in H1FY23

Personal Income tax

• Gross personal income tax at 9.6 lac crore for 2022-23 registering a YoY growth of 24%

No. of Tax-Payers

• 16% YoY growth in ITRs filed till 31 Jul 2023

Demat accounts

• 12.7 crore accounts in Aug2023, a growth of 26% YoY

MF Folios

• 16% growth in Oct23 YoY at 16.2 crore folios

MF SIP Inflows

• At all-time high of 17K crore in Nov23

Housing Sales

• 36% YoY growth in top 7 cities to 1.2 lakh units.

Auto Sales

• Registered strong 18% growth in Nov 2023

Household debt

• Household debt has remained flat in the last two years

Insurance premiums

• Life insurance 12.8%, General & Health at 16.4%

OTT viewership

• 16% annualized growth FY21-23

0.75% - 2% Rate Cut by FED

- Risk-on trade - Drive large FII inflows to Indian Equities
- FDI flows for Capex

1.5% - 2% Rate Cut by RBI

- Driving Economic Growth
- Large DII inflows

Election Year India

- Large fiscal and monetary allocations

Election Year US

- Favorable monetary and fiscal policies

Earnings growth and market re-rating

Growth Vectors for 2024



Omni Fintech, Digital
Banking & Payments



Omni Banking on Growth

Underlying Sectors driving the Growth vector:

Banks

Clean Balance Sheets, High Growth, Accelerating Earnings, Boost from Digital Banking, Significantly Mispriced, FII Inflows

Technology

Global demand for technology services, Impact of Fed cuts and domestic demand for technology in FinTech/BFSI/Govt., FII Inflows

FinTech

Driven Primarily by Broking, Insurance, Credit Cards & Payments



Omni Future of Mobility



Omni Power

Underlying Sectors driving the Growth vector:

Power

Demand from Economic growth, Railway demand, Commissioning of CWIP, New Capex, Deep Discount to IV

EV/ Clean Tech

Strong EV Launch pipeline in TW/ PV & CV, Renewable, Green Hydrogen Capex, EV Infra

Logistics

Multi-Modal Hubs, DFC, Metros/High Speed and Vande Bharat (Freight and Passenger), Waterways & Airways

Growth Vectors for 2024



Omni AI Tech Global



Omni Super Global

Underlying Sectors driving the Growth vector:

AI Revolution

Generative AI becoming mainstream, Technologies such as 5G, Advanced Robotics, Metaverse, etc. enabling multiple AI use cases

US Economy

GDP growth likely to surprise, Unemployment at 50yr low, Inflation slowing, Housing prices softening, Strong consumer demand, Global Supply chain Transformation, Industry 4.0/Robotics

Fed Rate Cut

Driving Economic growth, Consumer demand, liquidity enhancement, Risk on trade – Equities & EMs

Macroeconomic Insights

- India, US and Europe (GDP, Inflation, Interest Rates, Unemployment)

Quarterly Full Market Analysis (India, US & Europe)

- Slicing Bottom-up to identify:
 - Capital destroyers, eroders and imploders
 - Identify where alpha is hiding (Future Growth Vectors etc.)

Investment solutions

- Personal Finance
- How to allocate for Retirement, Healthcare, Income, etc.
- Asset allocation to Global equities, bonds, Multi-Assets etc.

Investment Philosophy

- What works in investing & Alpha generation
- Value, Growth, Scientific Investing, Smart Beta, Quant, AI, Growth Vector Investing



smallcase (200+ Managers, 500+ smallcases)

Number of Omni smallcases in Top 10

| 1 month | 6 Month | 1 year | 3 Year |
|----------|----------|----------|----------|
| 5 | 6 | 5 | 4 |

Source: smallcase.com as of Dec 19, 2023

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Omni Flexi-cap Performance Comparison

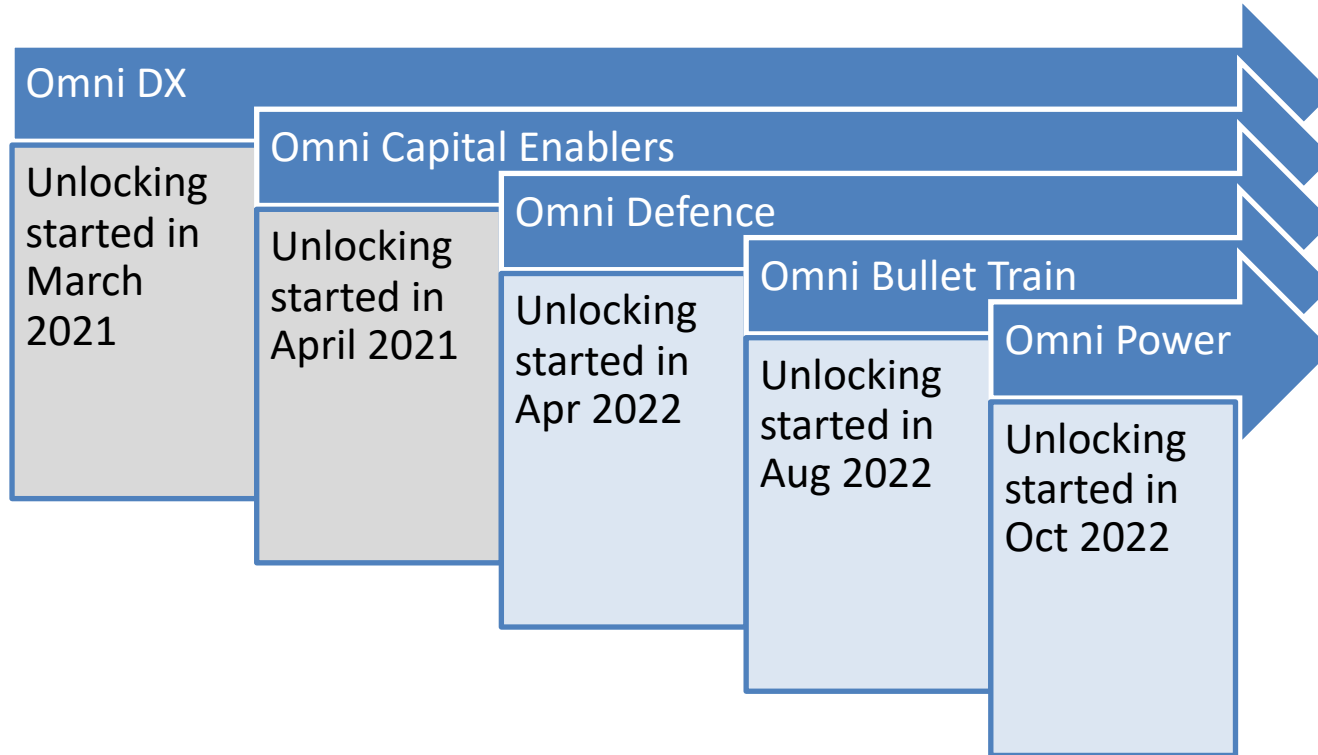
| PMS | AIF | MF |
|---|--|--|
| Top 10 | Top 5 | Rank 1 |
| <ul style="list-style-type: none">1yr & 3yr performance Multi/ Flexi-cap (~200) | <ul style="list-style-type: none">1yr & 3yr performance Cat-III Long Only AIFs (60+) | <ul style="list-style-type: none">1yr & 3yr Performance Multi/ Flexi-cap Funds (80+) |

“A rose by any other name would smell as sweet” - William Shakespeare

*Based on strategy returns of PMS, AIF and MF. Source: PMSBazaar.com, Valueresearchonline.com as of Nov 30, 2023

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Unlocking Timeline



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Omni Growth Vectors Performance

| STRATEGY | 1YEAR PERFORMANCE | BENCHMARK PERFORMANCE | COMPARABLE BENCHMARK |
|-----------------------|-------------------|-----------------------|----------------------|
| Omni Bharat Defence | 83.17% | 58.71% | Nifty India Defence* |
| Omni Capital Enablers | 75.01% | 9.20% | Nifty Bank |
| Omni Power | 116.68% | 23.50% | BSE Power |
| Omni Bullet Train | 106.58% | 29.84% | Nifty Infra |
| Omni DX | 69.40% | 23.64% | BSE IT |
| Omni SuperStox | 75.25% | 21.89% | Nifty 500 |

As of 21 Dec 2023 | * As of Nov 30, 2023

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Omni Bullet Train - Railway Infrastructure



INR 50 lakh crore TAM (2.4lac cr GBS)
Freight: 3X in 10 years*



*Source: National Rail Plan Vision – 2030 ([Link](#)), National Infrastructure Pipeline ([Link](#)), DFC ([Link](#)), Amrit Bharat Station Scheme ([Link](#)), Vande Bharat Express ([Link](#)), 3000 New Trains ([Link](#))



8 High Speed (Bullet)

1300+ Station Redevelopment

400 Vande Bharat Trains

30+ Metro

3000 New Passenger Trains in 5yrs

DFC (7K+ km) targeting 45% Freight (84K wagons)

Strong Fundamentals

- Net Debt to Equity: -0.2
- GM: 21%, OM: 13% & NM: 10%

Large Opportunity

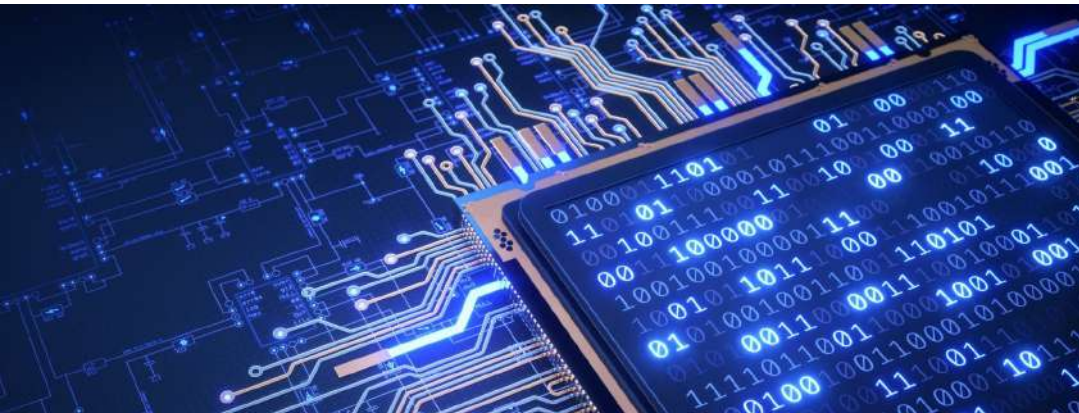
- 50 lac crore Capex push
- 2X – 5X Order book

Portfolio Advantage

- Economic Alpha: ROE 13.0% vs. 14.9%
- Valuation: P/E 30 Vs 26

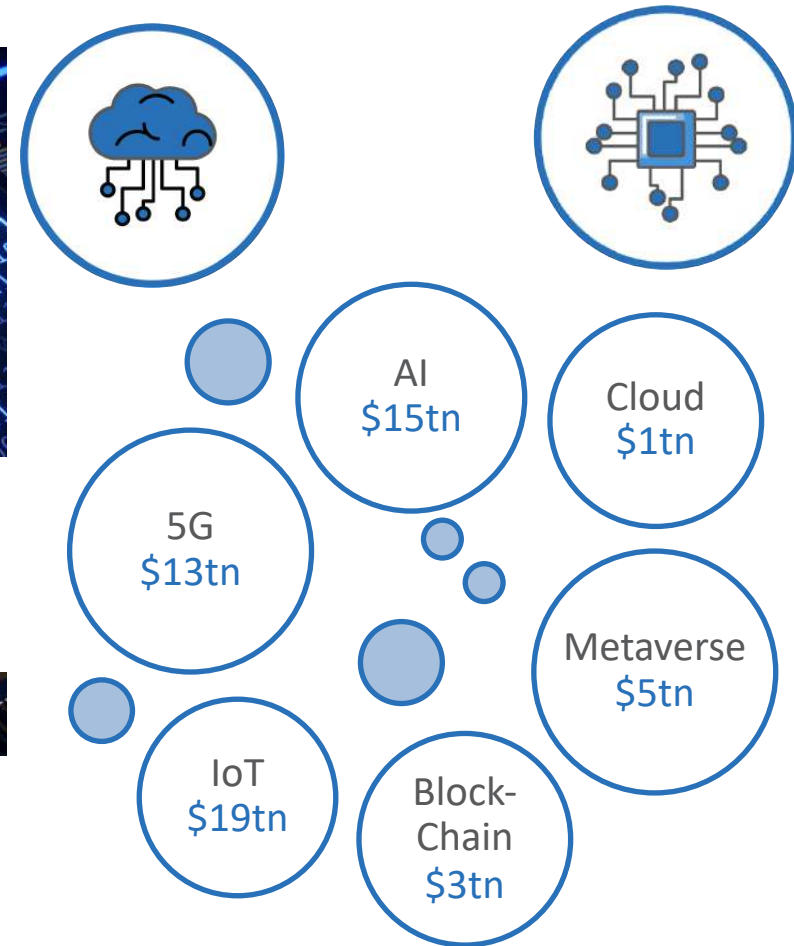
Omni DX - Digital Transformation

Omni AI-Tech Global



\$100 Trillion opportunity

Dollar diversification with hedge against Rupee depreciation



Source: Digital Transformation Initiative – World Economic Forum ([Link](#))
PwC's Global Artificial Intelligence Study ([Link](#)), The Impact of 5G – PwC & WEF Study ([Link](#)), The Internet of Things – Capgemini Consulting report ([Link](#))
Blockchain's Radical Promise – Gartner Research ([Link](#)), Value creation in the metaverse – McKinsey ([Link](#))

Strong Fundamentals

- Net Debt to Equity: -0.1
- GM: 32%, OM: 15% & NM: 10%

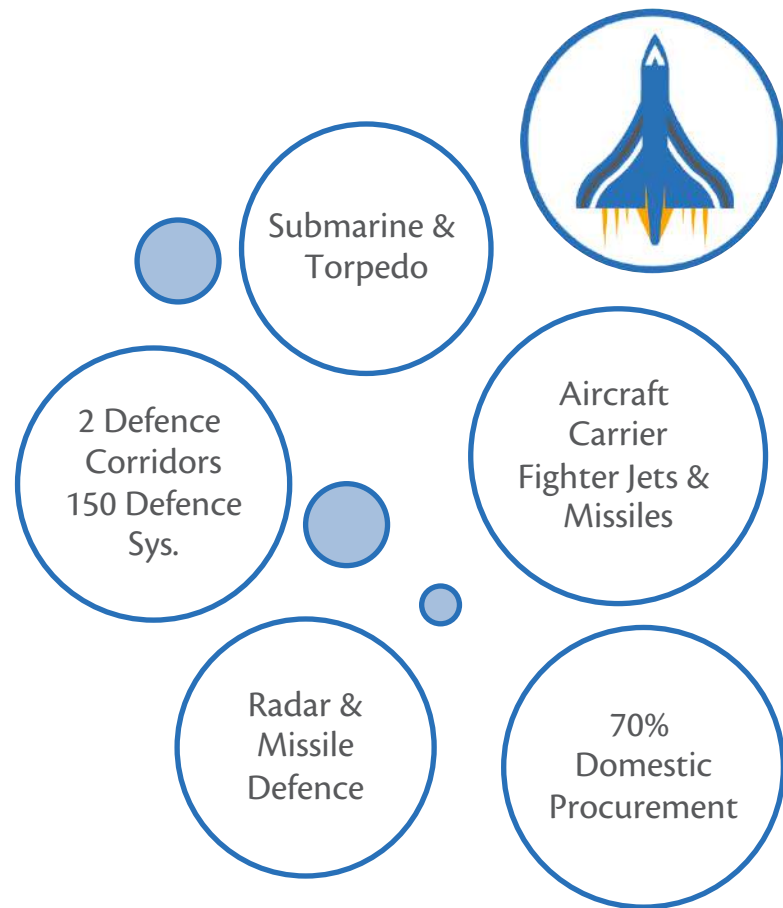
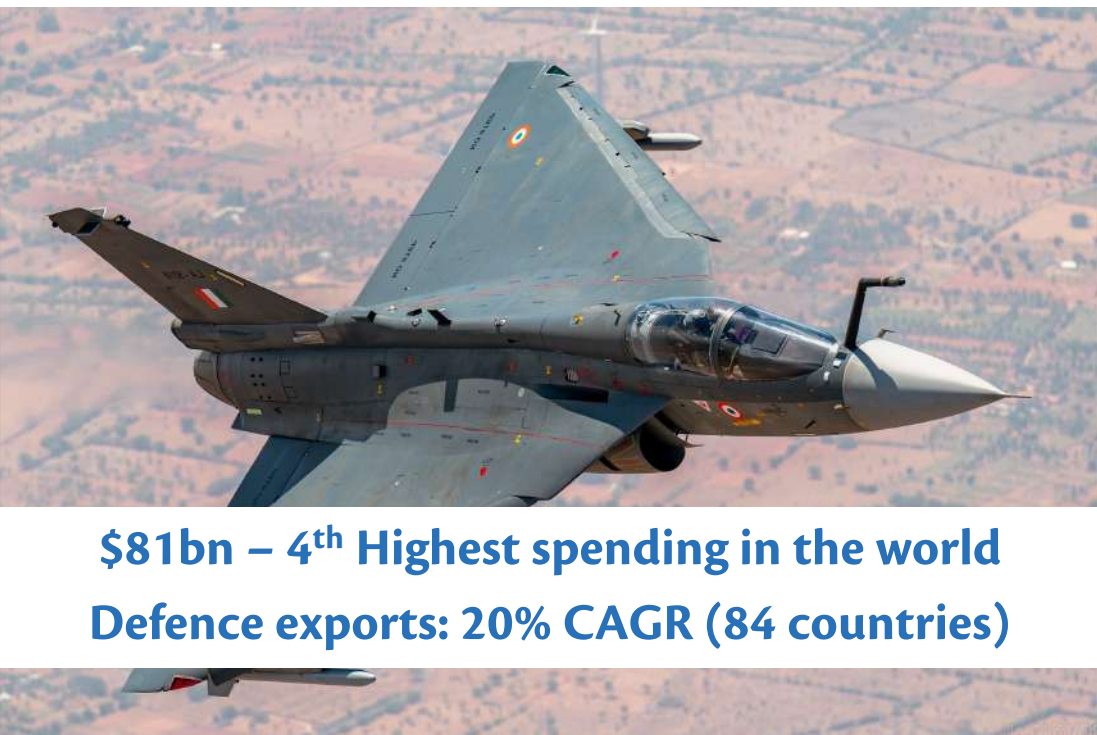
Large Opportunity

- \$100 trillion impact
- Multiple \$tn+ technologies

Portfolio Advantage

- Economic Alpha: ROE 19% vs. 14.9%
- Val. Alpha: P/E 22.3 vs 24.6

Omni Bharat Defense – Defending India



Source: National Infrastructure Pipeline ([Link](#)), Defence Industrial Corridors ([Link](#)), Defence Production Dashboard ([Link](#)), Defence Catalogue ([Link](#))

Strong Fundamentals

- Net Debt to Equity: -0.26
- GM: 39%, OM: 19% & NM: 14%

Large Opportunity

- Turnover of 1.75 lac cr by 2025 (~15% CAGR)
- 2X – 10X Order book

Portfolio Advantage

- Economic Alpha: ROE 15.1% vs. 13.6%
- Val. Alpha: P/E 22.7 vs 24.6

Omni Power – Electrifying India



**Power consumption to reach 4trillion units by 2030
(13% CAGR)**

24 lakh crore TAM – Empowering India’s Growth



Source: Consumption to hit 4 trillion units by 2030 ([Link](#))
Current Energy consumption data – Ministry of Power ([Link](#))
National Rail Plan Vision – 2030 ([Link](#))



Strong Fundamentals

- Net Debt to Equity: 0.6
- OM: 23% & NM: 15%
- Primarily AAA rated cos.

Large Opportunity

- 24 lac cr CAPEX push
- Double digit volume growth estd.

Portfolio Advantage

- Economic Alpha: ROE 11.7% vs. 13.6% (improving ROE – WIP & Lower NPA)
- Val. Alpha: P/E 6.7 vs 24.6 (DY 5.4%)

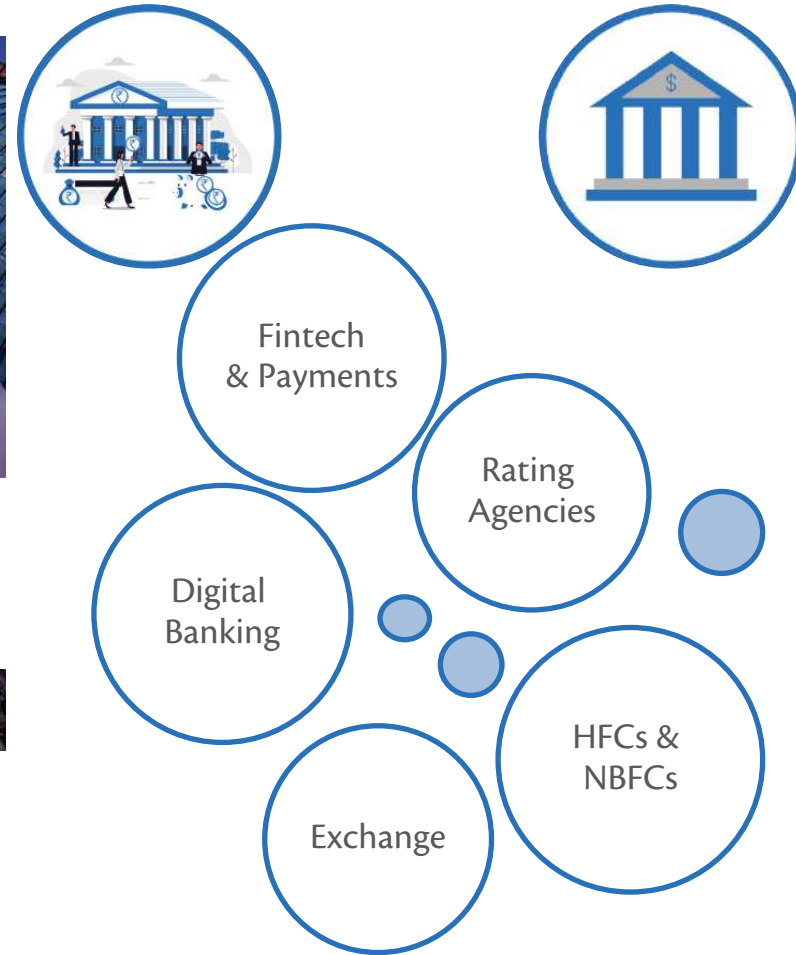
Omni Capital Enablers – Capitalizing India Omni Banking on Growth



100+ lakh crore new financing Opportunity
Capital providers and enablers for infra. dev.



Source: National Infrastructure Pipeline ([Link](#))



Strong Fundamentals

- Net Debt to Equity: NA
- OM: 26% & NM: 20%

Large Opportunity

- 100+ lac cr CAPEX push
- Multiple sub-growth vectors

Portfolio Advantage

- Economic Alpha: ROE 12.4% vs. 13.6% (improving RoE)
- Val. Alpha: P/BV 1.1 vs. 3.3

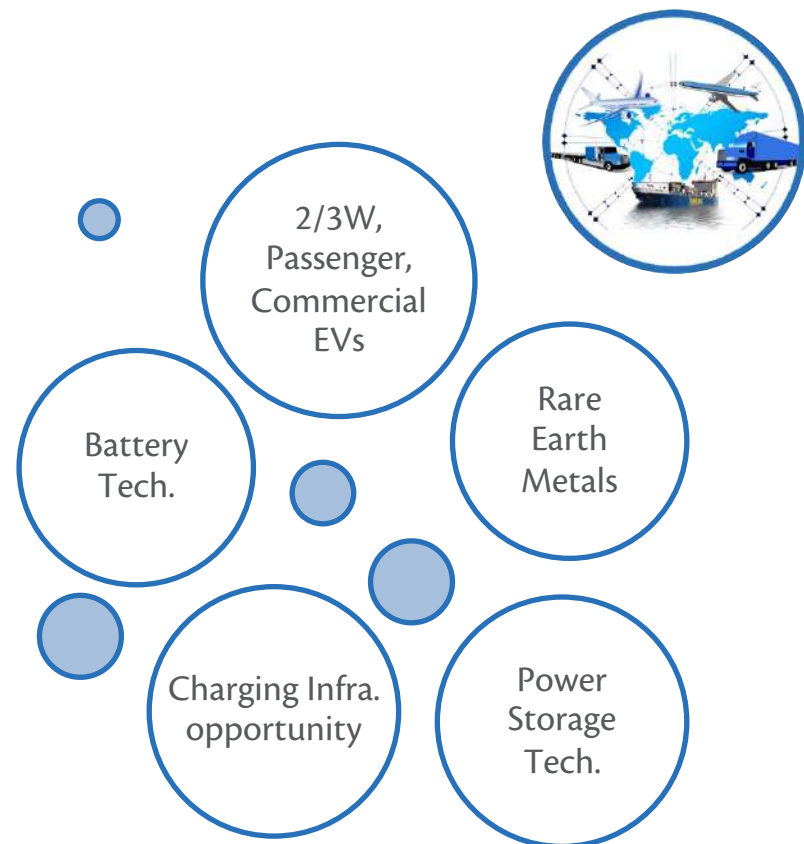
Omni Future of Mobility – EV, Green Hydrogen & Beyond



30@30 – 30% share by 2030

14 lac cr investments to achieve 2030 target
8 lac cr investments in Green Hydrogen

Source: India's Green Revolution ([Link](#)), National Green Hydrogen Mission ([Link](#)), World Business Council for Sustainable Development Report ([Link](#))



Strong Fundamentals

- Net Debt to Equity: low debt
- Higher margins

Large Opportunity

- 14 lac cr investment opportunity
- 30% PV, 70% CV & 80% TW

Portfolio Advantage

- Economic Alpha: ROE 14.4% vs. 13.6%
- Val. Alpha: P/E 12.4 vs 24.6

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Dr. Vikas V. Gupta

CEO & Chief Investment Strategist



- Vikas founded OmniScience Capital to provide a scientific approach to Global and India listed-equity investments. Together with his team, he formulated the proprietary Scientific Investing Framework.
- Scientific Investing Framework is the outcome of rebuilding investment management from first principles based on the combination of deep understanding of the 100+ years of investment research and the trial-by-fire over nearly two decades of investment experience across various global markets & market cycles. Deconstructing and reconstructing the above research and experience was the fundamental insight providing the foundations for Scientific Investing: In a risky asset class, such as equity, while, everyone is chasing alpha and getting risks, you could chase safety and get alpha.
- Earlier, Vikas incubated the global listed equity vertical of a multi-asset class investment management firm, obtaining, perhaps, the first US SEC license for an Indian firm. The firm won international awards and rankings, including being ranked by Preqin as the #1 long-bias equity manager for 2014 across more than 11000 hedge funds that Preqin tracks. With a vision of operating in the global markets he worked on getting licenses for investment management from SEBI (India), SEC (US), CSSF (Luxembourg), and FSC (Mauritius) for operating funds and providing advisory and portfolio management services and launched investment offerings for US, Europe, UK, Japan and India equity markets.
- He led advanced discussions and/or inked agreements with leading stock exchanges, asset management firms, banks and research firms across the globe, including from the US and Europe to offer global investment products including Smart beta Indexes, ETFs, UCITS, Structure Notes and managed accounts with the likes of New York Stock Exchange (NYSE), BATS, NASDAQ, London Stock Exchange, SIX (Swiss Stock Exchange), Luxembourg Stock Exchange, SGX, FTSE, S&P, STOXX, & Thomson Reuters.

Dr. Vikas V. Gupta - CEO & Chief Investment Strategist

- He entered an agreement with Asia's largest distribution network company to provide investment product on his scientific strategy. He has worked on multiple institutional mandate initiatives to offer jointly developed products with MFs, Insurance and Portfolio managers. Initiated dialogue with key ETF issuers in US, such as, Blackrock (iShares), PowerShares, Janus Capital (VelocityShares), ETF Managers Group etc.
- He developed a network of asset owners globally ranging from Family office and HNWI to some of the largest pension funds and sovereign funds. He also developed a global distribution network spread through wealth outfits and electronic fund distribution platforms in various jurisdictions including New York, London, Zurich, Singapore, Hong Kong, Dubai for the appropriate and relevant products. He filed for various patents, trademarks and copyrights to monetize intangible assets in various jurisdictions and initiated multiple academic partnerships with global institutions of research excellence such as LBS, CASS, ETFGI, Montclair State Univ., etc.
- He has a B.Tech from Indian Institute of Technology (IIT) Bombay and has earned his Masters and Doctorate from an Ivy League University—Columbia University, New York. He later served as a Research Scientist and Professor at University of California, Irvine, and IIT Kharagpur respectively.
- Vikas has been invited to write for global and India publications, such as, The Street (USA), Seeking Alpha (USA), Moneycontrol, Mint, and Economic Times. He has been frequently quoted & interviewed in various publications on Indian and Global markets, such as Wall Street Journal, Bloomberg, Forbes, Gulf News, Economic Times, CNBC, ETNow, Channel News Asia and others. He has co-authored a book on Corporate Governance in the context of Sarbanes-Oxley.



Ashwini Shami: EVP & Portfolio Manager

- Ashwini is a co-founder at OmniScience Capital. He manages global portfolios and leads research and business operations. He has spent more than a decade in global investment management, research and advisory on equity investments, fund raising and global asset allocation.
- Early on, being part of the Actuarial team at IFFCO-Tokio general insurance and working on risk analysis, claim projections and premium modelling he developed high level of “risk consciousness” which became the keystone for his investing profession – a mirror image of doing insurance.
- Previously, working with the Goldman Sachs global investment research team, Ashwini built capabilities on world-class research methodology and processes, developed sophisticated financial models for projections, intrinsic value estimation and strategic analyses using published financial 10K/10Q, 8K updates, IMS data, management calls and interviews, and put it together with the cross-country team to come up with actionable reports & market commentary. His team is credited to be the first to advocate breakup of big-pharma to unlock value which followed with Pfizer spinning out animal health & baby formula businesses. He also covered Merck, J&J, Abbott, Bristol Meyers and other pharma giants. He also initiated coverage on global generic pharma companies including Teva & Mylan.
- A stint in Investment Banking with Valterra Corporate Advisors gave him multi-sector exposure handling transactions for SMEs and high growth businesses in consumer, industrial & real estate sectors – an opportunity to view the investment process from the other side of the table—i.e. the view point of promoter.
- Before incubating OmniScience Capital, he was instrumental in setting up the equities vertical at another multi-asset class investment firm with a global suite of investment offerings through an international structure based out of Mauritius. The firm became one of the first US SEC registered global investment firm from India to be an Adviser on Interactive Brokers platform. He worked closely with NYSE and Reuters to launch a full series of 12 global strategies giving a comprehensive view of all developed markets across capitalizations.

Ashwini Shami: EVP & Portfolio Manager

- At the earlier firm, he also led a seven-member team for Portfolio Management Services (PMS) on Indian and global equity. He rolled out investment strategies to other AMCs for PMS and Advisory products and provided product and sales support. He played instrumental role in client prospecting with institutional clients, Family Offices, wealth managers, national & regional distributors. He managed key partners such as Index & Data service providers, investment consultants, global broker/dealers & fund platforms along with reporting and compliance with regulatory bodies including US SEC, SEBI, FSC.
- He holds an MBA degree with a specialization in finance and strategy from Indian Institute of Management (IIM) Lucknow and Toulouse Business School, France (École Supérieure de Commerce de Toulouse). He is a Bachelor of Technology from Indian Institute of Technology (IIT) Bombay in Mechanical Engineering. Ashwini likes to engage with students through various research initiatives and projects with management and financial studies institutes.



Varun Sood: VP Quantitative Research

- Varun is a co-founder at OmniScience Capital. He heads the quantitative research and analysis function at OmniScience Capital tracking and analysing nearly 5000 companies across US, EU, UK and India. He is responsible for translating the Scientific Investing philosophy and framework into quantitative models. These models are used to create the SuperNormal investment universe and the SuperNormal portfolios.
- He started his career with ING in Hong Kong working on quantitative modelling of their business across APAC. As an Equity Analyst, he got a rigorous experience of analysing listed equities at Trefis—a firm focused on providing insights & recommendations on major US-listed equities. He was responsible for covering US Tech and Defense stocks; including preparing DCF valuation models for firms, such as, Boeing, Lockheed Marting, Google, Amazon, among others. He wrote over 200 company & sector-specific articles published and syndicated to international publications such as Forbes & E-Trade; Initiated coverage for major tech IPOs such as Facebook & Groupon and made detailed DCF models for the same.
- Working at Masan Group—one of Vietnam's largest conglomerates—as a Senior Associate, he learnt the investment perspective and methods of strategic investors and private market buyers when evaluating large deals and unlisted companies. He was responsible for evaluation of investment potential across a wide variety of sectors including retail, natural rubber and shrimp-feed, with extensive experience in preparing buy-side investment theses.
- Before founding OmniScience Capital, he was heading the quant-research at another global investment management firm; preparing detailed backtests for their proprietary global and domestic investment strategies and also responsible for creating, rebalancing and monitoring performance of all in-house investment strategies. He co-developed dozens of investment strategies across developed markets, US, EU, UK, Japan and emerging markets, such as, India, GCC etc. He worked with NYSE and Reuters in implementing several of them as live strategies on their platforms.
- He has a B.Tech. in Mechanical Engineering from IIT Roorkee, Post-Graduate Diploma in Management from IIM Bangalore and EDHEC France.

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