



SEERS FUND MANAGEMENT PRIVATE LIMITED

CIN No.: U67200DL2016PTC306263
Portfolio Manager Regd. No.: INP000005398
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Seers Enduring Portfolio

Our aim is to develop deep and long-lasting professional relationship with Clients while working towards Wealth Creation. Seers core approach to wealth creation, a comprehensive suite of investing solutions is offered which helps our investors/investors to create a roadmap to their planned future. We believe in providing professional services with integrity and objectivity, while maintaining a strong relationship with consistent and transparent communications.

Seers Group is managed by certified financial professionals, Rajesh Seth (Chartered Accountant) and Chander Bhatia (Cost and Management Accountant) having two decades of expertise in managing an entire spectrum of investment vehicles.

In 2005, the promoters established a formal Equity Research Firm and Team. Their belief, the “Art of Wealth Creation” in the stock market is practicing patience and consistency, while eyeing on a long-term perspective. Practicing these traits, along with sound knowledge of fundamentals and ideal stock selection, is a key to success.

Seers’ philosophy of wealth management has been a bottom-up approach for research, focusing on niche businesses having leadership position in the sector managed by managers having high creditability. The investment horizon is between three to five years at least for each investment. With our expertise, our investment philosophy and expertise in value investing, customized investment solutions were worked out and investment opportunities were identified through in-house and customized analytical tools developed over the years.

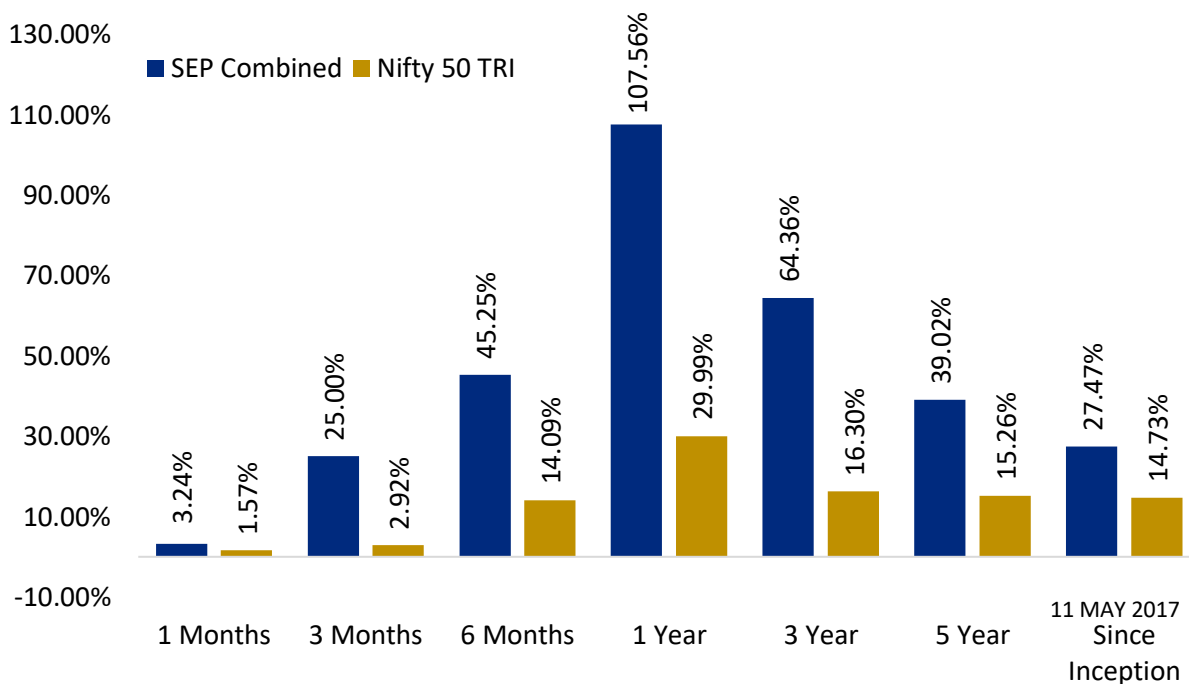
Though investment in equity shares have inherit risks and there is no guarantee in investing in stocks, but once done, based on thorough research and with due diligence, can give good returns over a long period of time. As discussed above, Seers could deliver annual compounded rate of return (XIRR) of 38% in the past 19 plus years starting from April 2005 till date (31st March 2024). One must keep in mind that past performance may not always be a reliable indicator of future results, but our efforts and knowledge bank gets honed year after year, and we are confident on the strategy that drives our portfolio.

We look forward to being a catalyst in its associates’ and clients’ financial growth.



Seers Group – History

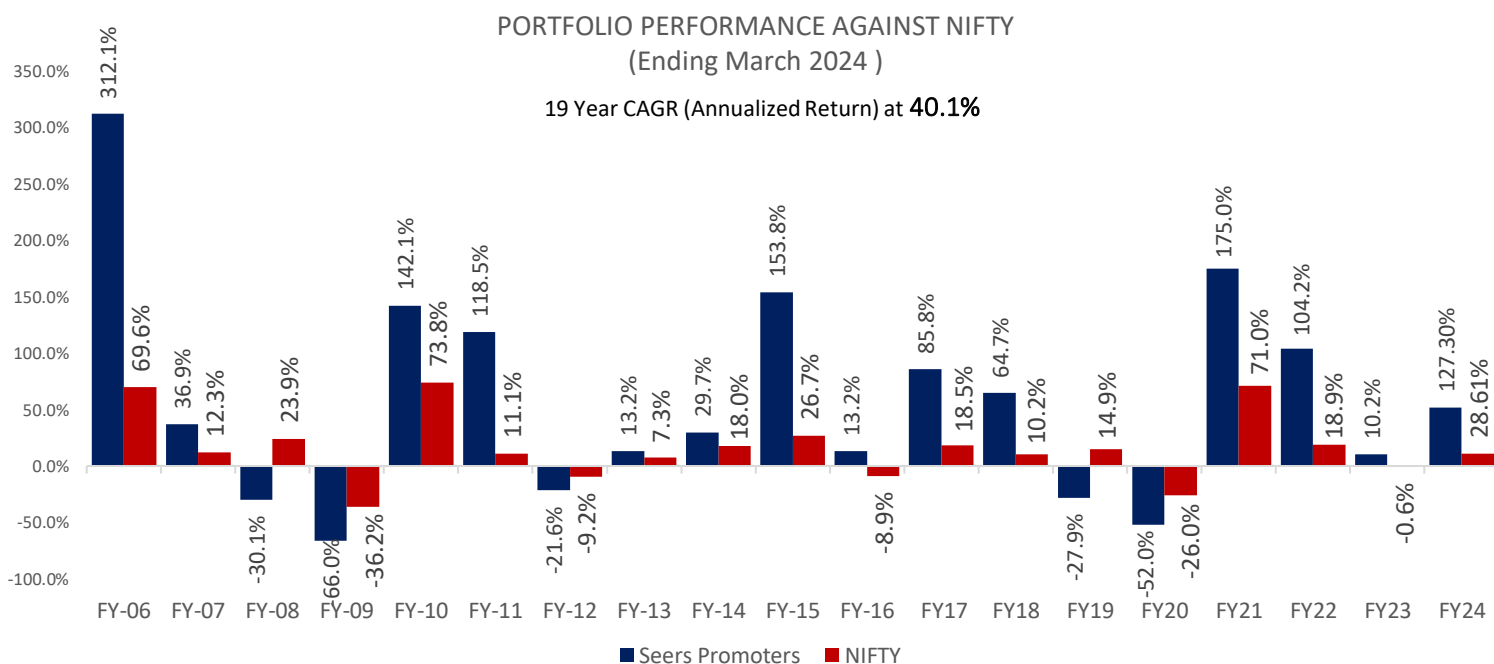
SEP - Performance for the month ending March 2024



Promoters and Founder Members of Seers Group, FCA Rajesh Seth and CMA Chander Bhatia, had been investing in Indian Equities in their individual capacities since early nineties. They earned the experience and traits of stock investing while carving their way to success in wealth creation.

In 2005, they decided to leave their respective, promising careers and joined hands to set up an organization to carry out fundamental equity research. An Equity Research Lab under the name and style of *M/s Tushar Investments* was set up as a partnership firm, with an aim to carry out “Fundamental Equity Research” with long term perspective for the benefit of the partners.

Over the period, in-house customized analytical tools and systems were developed by the promoters which helped them identify investment opportunities to succeed in ‘Value based Investing’.



Over the period of 19 years, Promoters could fit in the quote of Benjamin Graham *“An investment in knowledge always pays the best interest”*.

Promoters had been investing with the following **key doctrines**:

- Well-carved Investment Philosophy.
- Well-defined Professional Ethics.
- Well-designed Investment Concepts.
- Well-tested, Experience and strong Investment Management Capability.
- High standards of Client’s Servicing.

And in the process, Promoters carved *“SEERS STRATEGY”* at their own cost and carried out it’s *“on the road testing”* at their own risk.

“Seers Strategy” may be coined as under: -

“S” – See - Seeing an investment opportunity / seeing the dawn of an opportunity.

“E” – Explore - Exploring and evaluating the opportunity.

“E” – Exposure - Entering the opportunity – taking an exposure.

“R” – Review - Revaluating, reviewing and continuous monitoring of the opportunity.

“S” – Seeing Off - Seeing off the opportunity as and when exit signals clicks off.

It was only in February 2016, Promoters decided to open the above said *“Seers Strategy”* to the public at large, by setting up an Advisory Firm under the name and style of *M/s Seers Advisors*. Permission from ‘Securities Exchange Board of India’ - (SEBI) was sought in February 2016 which was granted on 13th May 2016. Effective from May 2016, the research operations of Tushar Investments were merged in Seers Advisors and trading operations and short-term investments activities of Tushar Investments were stopped i.e., *since May 2016, the sole focus of Seers Group had been on Equity Research and Long-Term Investing. On 22nd September 2016* under the Companies Act, 2013 having its Registered Office at H – 11/B, Vijay Nagar, Delhi 110009, and Business / Corporate Office at 812, 8th Floor, Wave Silver Tower, Sector 18, NOIDA, Uttar Pradesh 201301 with the CIN number U67200DL2016PTC306263. Acquired the licence to provide the Portfolio Management Service in February 2017, which was granted with effect from April 17, 2017. In the month of May 2017, Seers Fund Management Private Limited, a SEBI registered Portfolio Manager vide registration number INP000005398, launched its first portfolio management services, namely *SEERS ENDURING PORTFOLIO (SEP)*.

Seers Fund Management Private Limited, though incorporated in September 2016, was conceived in August 2005 when the promoters, namely CA Rajesh Seth and CMA Chander Bhatia, initiated their first joint venture of M/s Tushar Investments, followed by the second venture of M/s Seers Advisors, thus has a track record of more than 19 years.

SEERS GROUP - Milestones:

- Aug 2005: Equity Research Lab was established – M/s Tushar Investments
- Feb 2016: Advisory Firm established under the name and style of Seers Advisors
- May 2016: SEBI grants RIA License to Seers Advisors
- Sep 2016: Seers Fund Management Private Limited was incorporated.
- Apr 2017: SEBI grants Portfolio Manager’s License.
- May 2017: First Portfolio Management Service under the name – SEERS ENDURING PORTFOLIO launched.
- Jan 2022: Assets Under Management (AUM) of Seers Group exceeds the mark of INR 100.0 crore.
- Nov 2023: Assets Under Management (AUM) of Seers Group exceeds the mark of INR 200.0 crore.
- Apr 2024: Assets Under Management (AUM) of Seers Group exceeds the mark of INR 300.0 crore.