

# **Research Scorecard**

**June 2023** 



Dedicated team for Fundamental, Derivative and Technical research in Retail research

Total 36 fundamental research analysts covering 370 companies across sectors

Long term Investing	<ul> <li>Three to five years perspective – Equity model portfolio</li> <li>Twelve to 15 month perspective – Detailed company reports</li> <li>Others – Muhurat Picks, Annual Strategy Picks, event based picks</li> </ul>
Medium term Investing	<ul> <li>Three to Six months perspective</li> <li>Quant Picks and Gladiator Stocks</li> </ul>
Short term Trading	<ul> <li>Seven to 30 days perspective</li> <li>Monthly and Weekly Reports – Technical &amp; Derivatives</li> <li>Momentum Pick, Positional Derivatives and Volatility Insight</li> </ul>
Intra – day Trading	<ul> <li>One to three days perspective</li> <li>Daily Calls – Technical, Momentum and Derivatives</li> <li>Intra-day Calls – BTST, Margin and Derivatives</li> </ul>



## **Research Performance – Long Term Investing**



Company	Reco Price (₹)	Target Price (₹)	Return (%)	CMP	Status*	Date of Closing/Profit Booking
Axis Bank	797.9	970	21.6		Target Achieved	04-01-2023
City Union Bank	183	215	17.5	126	-31%	
Apollo Tyres	269	335	24.5		Target Achieved	05-01-2023
Eicher Motors	3390	4170	23.0	3732	10%	
Coforge	3593	4375	21.8		Target Achieved	24-01-2023
Lemon Tree Hotels	85	110	29.4	93.2	10%	
Healthcare Global Ent	295	345	16.9	317	7%	
Lauras Lab	505	675	33.7		Close Call	16-12-2022
Container Corp	695	890	28.1	672	-3%	
Havells India	1279	1650	29.0	1348	5%	
* upside till 7th June 2023						

### Recommended on October 12, 2022

#### Muhurat Picks performance of previous year (October 2021)

- Recommendations: 7
- Success Rate: 71%
- Average return on positive calls: 21%



### Yearly Strategy performance of previous year (CY22)

- Recommendations: 10
- Success Rate: 50%
- Average return on positive calls: 34.8%

### Recommended on December 27, 2022

Company	Reco Price (₹)	Target Price (₹)	Return (%)	СМР	Status	Date of Closing/Profit Booking
Kajaria Ceramics	1101	1340	22.0	1264	15%	
Sterlite Technologies	172	220	28.0	150	-13%	
Maruti Suzuki	8305	11200	35.0	9761	18%	
Mahindra CIE	326	410	26.0		Target Achieved	1st Februay 2022
IndusInd Bank	1202	1450	21.0	1311	9%	
HDFC AMC	2164	2600	20.0	1973	-9%	
Nesco Ltd	601	800	33.0	651	8%	
V Guard Industries	261	310	19.0	254	-3%	
<b>Reliance Industries</b>	2545	3050	20.0	2475	-3%	
* upside till 7th May 2023						



Portfolio Name	Incep Return 3N	/I Returns §6N	A Returns 91Y	Returns %
Proposed Capex Plays	62.0%	13.4%	12.4%	32.8%
Outperformance	43.9%	5.0%	13.3%	21.2%
Leaders of Tomorrow	65.5%	16.7%	11.3%	31.0%
Outperformance	36.0%	8.3%	12.3%	19.4%
Infra & Real	45.2%	16.4%	6.5%	29.1%
Outperformance	27.5%	8.0%	7.4%	17.5%
Unorganised to Organised	2 <mark>8.9%</mark>	12.3%	<mark>3</mark> .3%	18.3%
Outperformance	1 <mark>1.1%</mark>	3.9%	4.3%	6.7%
Export Champ	28. <mark>8%</mark>	10.2%	7.4%	14.0%
Outperformance	10.7%	1.8%	8.3%	2.4%
Capital Compounders	30.4%	9.2%	3.0%	15.5%
Outperformance	4.5%	0.8%	4.0%	3.9%
Logistics	17.3%	8.1%	-3.4%	10.6%
Outperformance	-0.9%	-0.3%	-2.4%	-1.0%

Portfolio Name	Incep ReturnM Returns % M Returns % Y Returns %					
All Weather Multicap	28.1%	9.4%	2.2%	19.9%		
Outperformance	-1.3%	1.1%	3.1%	8.3%		
Equity Opportunities	22.6%	8.4%	3.4%	22.6%		
Outperformance	-3.6%	0.0%	4.4%	11.0%		
Equity Growth	22.1%	12.8%	8.4%	31.2%		
Outperformance	-4.1%	4.4%	9.4%	19.6%		
Equity Frontline	10.3%	8.1%	1.5%	14.6%		
Outperformance	-16.3%	-0.3%	2.4%	3.0%		
Rising India	12.6%	9.8%	3.4%	19.4%		
Outperformance	-16.9%	1.4%	4.3%	7.8%		
CRAMS Oppo	-3.7%	8.8%	-0.2%	2.1%		
Outperformance	-21.5%	0.4%	0.8%	-9.4%		

## Fundamental One Click Portfolio MIS



Portfolio Name	Inception Date	Return %	AUM (Rs. Lacs
Best under 100	02-07-2020	176.1%	169.8
Stocks under 12 PE	07-01-2021	107.7%	23.3
Fab 5 Chemicals	19/06/2020	103.9%	50.8
Defence 2022	09-03-2022	103.2%	450.9
Golden Largecap	00-01-1900	95.1%	29.7
Aat <mark>man</mark> irbhar Bhavishya	19/06/2020	94.0%	6.4
Best under 200	03-03-2021	91.3%	73.4
Golden Midcap	00-01-1900	85.3%	45.0
Auto Anc Multibagger	24-05 <mark>-20</mark> 21	81.5%	10.1
Best of Both World	<mark>19/06/</mark> 2020	77.1%	9.3
Banking @ T 20	29-08-2020	59.4%	7.0
Mangal Arambh	08-07-2020	59.2%	48.6
Nano Basket - IT Sector	08-12-2022	56.0%	103.9
EV Winners	19-05-2021	47.3%	29.7

• Currently, we have 48 live portfolios with average return of 37.5%

• We have exited 67 portfolios with average return of 14.8%, 109% being the highest booked return \* CMP as on 2<sup>nd</sup> June 2023



Yearly Technical Recommendations for CY23					
Rec. Date	Stock Recommended	Buying Range	Target	% Profit/Loss	Comment
19-Dec-22	Techno Electric & Eng	312.00	410.00	20	Booked profit at 374.00
19-Dec-22	KEC International	473.00	598.00	13	Booked 50% profit at 535
19-Dec-22	Bosch	17090.00	22000.00	11	Booked 50% profit at 18970
19-Dec-22	Bajaj Electri <mark>cals</mark>	1130.00	1440.00	10	Booked 50% profit at 1243
19-Dec-22	Larsen & Toubro	2148.00	2520.00	8	Booked 50% profit at 2316
19-Dec-22	Am <mark>buj</mark> a Cements	545-572	660.00		Open
19-Dec-22	Federal Bank	132-140	168.00		Open
19-Dec-22	Sundaram Finance	2290-2420	289 <mark>0</mark> .00		Open
19-Dec-22	Mishra Dhatu Nigam	215-230	29 <mark>5</mark> .00		Open

### Yearly Technical performance for CY23

- Total Recommendations: 9
- Open: 4
- Positive: 5
- Strike Rate: 100%
- Average return on positive calls: 12.0%

### Yearly Quant picks



#### Yearly Quant Picks for 2023

- Recommendations: 6
- Profits booked : 0
- Stop loss Triggered: 0
- Open : 6
- Success Rate: NA
- Average return on positive calls: NA

### Yearly Quant Picks performance in CY22

Date	Scrip	Action	Price	Target	Stop Loss	Last close	Return at close	Time Fran	ne Remarks
23 Dec 21	Mindtree	Buy	4500-4620	5810	3925	3925	-14.7%	12 months	Stoploss triggered
23 Dec 21	Reliance	Buy	2300-2360	2960	1990	2653	13.9%	12 months	Profit booked
23 Dec 21	PVR Limited	Buy	1290-1330	1680	1120	1520	16.0%	12 months	Profit booked
23 Dec 21	State Bank of India	Buy	445-460	580	384	511	12.8%	12 months	Profit booked
23 Dec 21	Apollo Hospitals	Buy	4700-4820	6045	4098	4305	-10.3%	12 months	Stoploss triggered



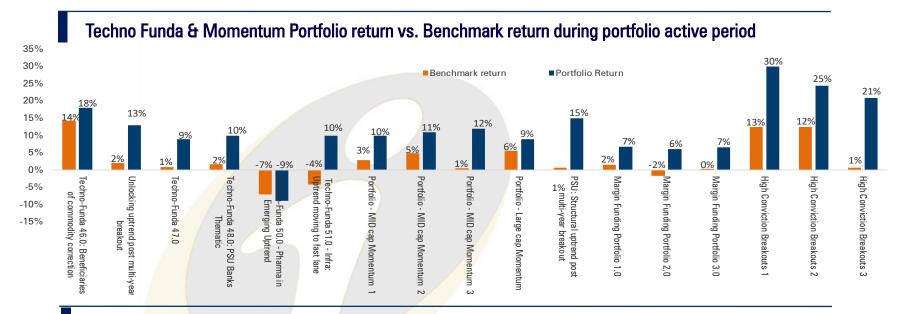
### FY23 Performance

- Total Recommendations: 14
- Open: 3
- Positive: 10
- Strike Rate: 91%
- Average return of Portfolio: 12%
- Average return of NSE 500 during portfolio active period: 2%

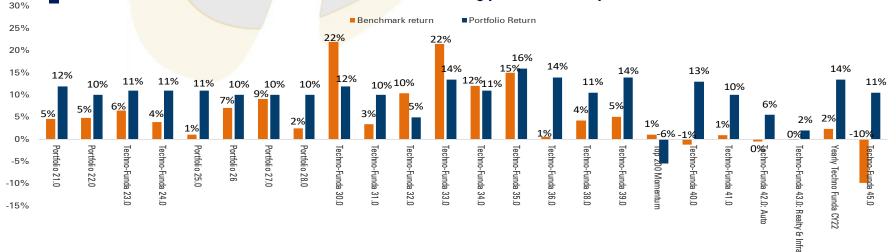
#### Performance since inception (FY21 - till date )

- Total Recommendations: 68
- Open: 7
- Positive: 59
- Strike Rate: 97%
- Average return of Portfolio: 11%
- Average return of NSE 500 during portfolio active period: 6%
- 75% of the portfolios were closed within average 41 days





Techno Funda Portfolio return vs. Benchmark return during portfolio active period



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## **Research Performance – Medium Term Investing**



### FY23 Performance

- Recommendations: 12
- Open: 1
- Exit at cost: 0
- Strike Rate: 100%
- Average return on positive calls: 10.0%

### Performance from FY21-till date

- Recommendations: 107
- Open: 2
- Exit at cost: 1
- Strike Rate: 91%
- Average return on positive calls: 15.0%
- Average return on negative calls: -12.0%

### **Gladiator Stocks - Success rate consistently above 76%**



### FY24 Performance

- Recommendations: 27
- Open: 5
- Exit at cost: 1
- Strike Rate: 81%
- Average return on positive calls: 11.0%
- Average return on negative calls: -5.5%

### Performance since inception (FY15 - till date )

- Recommendations: 873
- Open: 5
- Exit at cost: 27
- Strike Rate: 78%
- Average return on positive calls: 15.0%
- Average return on negative calls: -8.0%

### **Quant Picks**



### FY24 Performance

- Number of Calls recommended: 4
- Positive payoff: 2
- Open: 2
- Success rate: 100%
- Average return on positive calls: 6%

### Performance since 2018

- Recommendations: 391
- Positive payoff: 271
- Open: 10
- Exit at cost: 8
- Success Rate: 73%
- Average return on positive calls: 12%



# **Research Performance – Short Term Trading**

### **Margin Funding Picks**



### May Performance

- Recommendations :10
- Open: 3
- Exit at cost: 0
- Strike rate: 100%
- Average return on positive calls: 8%

### FY24 Performance

- Recommendations : 18
- Open: 3
- Exit at cost: 0
- Strike rate: 100%
- Average return on positive calls : 8.0%

### **Momentum Pick (Positional Recommendations)**



### May Performance

- Recommendations :36
- Open: 2
- Exit at cost: 4
- Strike rate: 90%
- Average return on positive calls: 6.0%
- Average return on Negative calls: -2.5%

### FY24 Performance

- Recommendations : 58
- Open: 2
- Exit at cost: 5
- Strike rate: 92%
- Average return on positive calls : 5.5%
- Average return on Negative calls: -2.5%



## **Research Performance – Intra Day Trading**

## Trading Calls (Intraday)



### May Performance

Strike rate of 67%

Trading	Margin Calls & Derivative calls
Total Calls	430
Positive Payoff	287
Open	0
Strike Rate	67%



#### **May Performance**

- No. of Calls : 41
- Profits Booked : 28
- Exit in loss : 4
- Exit at cost : 1
- Open/Not Initiated : 0
- Success rate: 70.00%

#### **Stock Recommendations**

- No. of Calls : 16
- Profits Booked : 9
- Exit in loss : 3
- Exit at cost : 1
- Open/Not Initiated : 0
- Success rate: 60.00%

#### **Index Recommendation**

- No. of Calls : 25
- Profits Booked : 19
- Exit in loss : 1
- Exit at cost : 0
- Open/Not Initiated : 0
- Success rate: 76.00%

### Performance since 2018 (Stocks and Index combined)

- No. of Calls : 1367
- Profits Booked : 920
- Exit in loss : 357
- Exit at cost : 15
- Open/Not Initiated : 31
- Success rate: 69.64%

### **Expiry Index Calls**



### May Performance

- Recommendations: 121
- Exit at cost : 11
- Profits Booked 67
- Success Rate: 60.36%

### FY22 Performance

- Recommendations: 2422
- Exit at cost : 63
- Profits Booked : 1697
- Success Rate: 70.06%

### **Currency Derivatives**



### May Performance

- Recommendations: 53
- Exit at cost : 0
- Profits Booked : 32
- Success Rate: 60.4%

### Performance since April 2020

- Recommendations: 1854
- Exit at cost : 28
- Profit Booked : 1269
- Success Rate: 68.5%

### **Commodity Derivatives**



### May Performance

- Recommendations: 151
- Exit at cost : 4
- Profits Booked : 103
- Success Rate: 68.2%

### As on Date Performance

- Recommendations: 4277
- Exit at cost : 36
- Profit Booked : 2864
- Success Rate: 67%



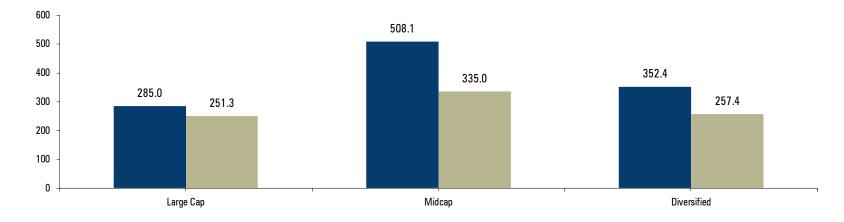
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- New ideas have generated strong returns, Nano Nivesh recommendations depict seven stocks that turned into multi-baggers
- I-direct Instinct report captures the tactical market opportunity by giving fundamental call in a time bound manner in short report
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### **Equity Model Portfolio**



### Performance (return since inception)#

All three portfolios continue to outperform their respective benchmark indices, indicating that our picks have been more consistent and stable vis-à-vis their respective indices on an average.



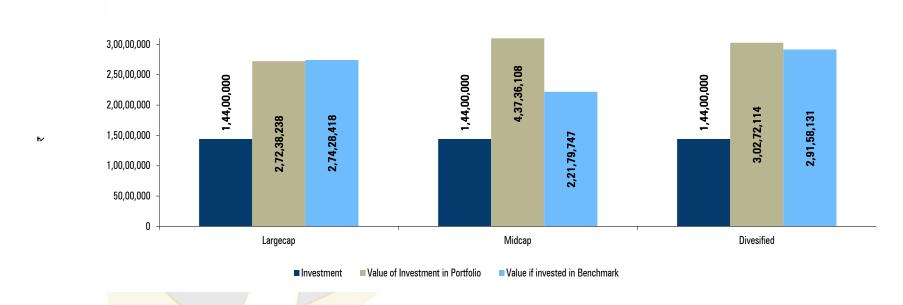
Portfolio Benchmark

As on May 31, 2023 # includes dividend yield

%



Value as on 31<sup>st</sup> May 2023



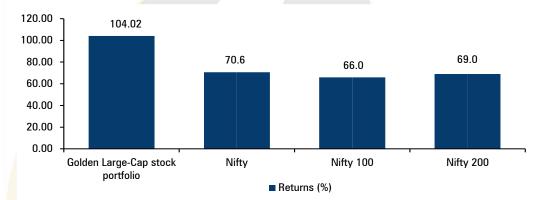
- SIPs in all three portfolios (large cap, midcap and diversified portfolio) continue to outperform
   SIPs in their respective index
- Assuming ₹ 1,00,000 invested as SIP at the end of every month
- Start date of SIP is June 30, 2011

### **Golden Stock Portfolio**



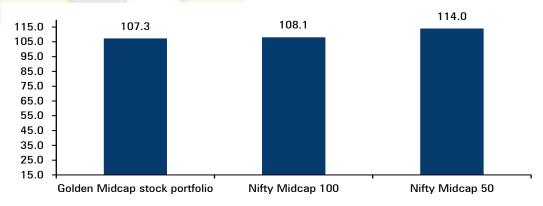
#### Performance (return since inception)#

Golden large cap portfolio continues to outperform its respective benchmark indices, indicating that our picks have been more consistent and stable vis-à-vis their respective indices on an average.



#### Performance of Golden Large cap Portfolio

#### Performance of Golden Mid Cap Portfolio







#### Pankaj Pandey

#### Head – Research

ICICI Direct Research Desk, ICICI Securities Limited, Third Floor, Brillanto House, Road No 13, MIDC, Andheri (East) Mumbai – 400 093 research@icicidirect.com

#### pankaj.pandey@icicisecurities.com



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Name of the Compliance officer (Research Analyst): Mr. Anoop Goyal Contact number: 022-40701000 E-mail Address: complianceofficer@icicicisecurities.com For any queries or grievances: Mr. Prabodh Avadhoot Email address: headservicequality@icicidirect.com Contact Number: 18601231122

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