

# Research Scorecard

January 2024

# Research Desk @ICICIdirect



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

Total 9 fundamental research analysts covering 100+ companies across sectors

Long term Investing	<ul> <li>Three to five years perspective – Equity model portfolio</li> <li>Twelve to 15 month perspective – Conviction Ideas</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>Shubh Nivesh, 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

# Muhurat Picks - Strong gains



#### Recommended on November 3, 2023

Company	Reco Price ( )	Target Price ( )	Return (%)	CMP	Status*	Comments
Larsen & Toubro Ltd.	2918	3560	22.0	3517	21%	Target Achieved
Coromandel International Ltd	1058	1330	25.7	1221	15%	-
State Bank of India	572	725	26.7	637	11%	-
Spandana Sphoorthy Financial Ltd.	867	1100	26.9	1195	38%	Target Achieved
Bharat Dynamics Ltd	1001	1260	25.9	1724	72%	Target Achieved
TV Today Networks Ltd.	193	260	34.7	260	35%	Target Achieved
Century Plyboards (I) Ltd.	607	750	23.6	765	26%	Target Achieved

CMP as on 9th January 2024

Muhurat Picks performance of previous year (October 2022)

- Recommendations: 10
- Success Rate: 80%
- Average return on positive calls: 19%

# Yearly Strategy Picks – Fundamental calls average return of 17%



#### Yearly Strategy performance of previous year (CY23)

• Recommendations: 9

Success Rate: 89%

Average return on all calls: 17%

#### Recommended on December 29, 2023

Company	Reco Price ( )	Target Price ( )	Return (%)	CMP	Status*
UGRO C <mark>apital</mark>	269	350	30.1	277	3%
SBI Cards	760	950	25.0	768	1%
NMDC	207	250	20.8	220	6%
Uno Minda	670	810	20.9	695	4%
Greenply Industries	238	295	23.9	256	8%
Birla Corporation	1440	1755	21.9	1442	0%
Grindwell Norton	2259	2700	19.5	2304	2%

CMP as on 8th January 2024

# Premium Portfolio MIS



		1 Y	ear Return	Since Inception Return	
Nos	Basket / Benchmark	Portfolio	Benchmark	Portfolio	Benchmark
1	Rising Capex: Gateway to 5 Trillion Economy	48.0%	25.0%	106.5%	45.1%
2	Leaders of Tomorrow	44.0%	25.0%	124.6%	59.1%
3	Momentum Smart Beta - Large and Midcap	38.0%	25.0%	41.2%	36.2%
4	All Weather Multi Cap	27.0%	25.0%	59.8%	59.1%
5	Equity Frontline	36.0%	25.0%	36.4%	55.7%
6	Capital Compounders	29.0%	25.0%	69.1%	54.7%
7	India Rising	35.0%	/ 25.0%	43.6%	59.1%

Data as on December 31st, 2023.

# Fundamental One Click Portfolio MIS



Nos	Name	Portfolio	Benchmark		
IVOS	name	Return	Return	Outperformance	
1	Best under 100	315%	120%	195.0%	
2	Defence 2022	300%	39%	261.2%	
3	Best under 200	236%	52%	184.0%	
4	Stocks under 12 PE	173%	65%	107.4%	
5	Nano Basket - IT Sector	152%	22%	129.4%	
6	Nano Basket - Capital Goods	101%	22%	79.1%	
7	Fab 5 Chemicals	97%	131%	-34.5%	
8	Potential Multibagger 3.0	86%	45%	41.6%	
9	Power	82%	27%	54.7%	
10	Dividend Stars	78%	106%	-28.4%	
11	Emerging Hospitals	74%	29%	44.9%	
12	Best under 500	64%	45%	19.6%	
13	Nan <mark>o Baske</mark> t - Metal	60%	22%	38.3%	
14	House of Mahindra	60%	65%	-5.4%	
15	Nano Basket - Textile	60%	22%	37.4%	
16	Nano Basket - Infra	55%	22%	32.8%	
17	<b>Most Admired Brands</b>	53%	98%	-45.0%	
18	Nano Basket - Healthcare	50%	22%	27.4%	
19	Best of Tatas	48%	61%	-13.5%	
20	Nano Basket - BFSI	39%	23%	15.8%	
21	Travel India	36%	29%	7.3%	
22	Aatmanirbhar Bhavishya	20%	122%	-102.3%	
23	Mangal Arambh	-58%	121%	-179.2%	

<sup>\*</sup> Data as on December 31st, 2023. Portfolio return since inception

# **Yearly Technical picks**



### 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	23	Booked profit at 581.00
19-Dec-22	Bosch	17090.00	22000.00	26	Booked profit at 21550
19-Dec-22	Bajaj Bectricals	1130.00	1440.00	10	Booked 50% profit at 1243, then trailing SL triggered
19-Dec-22	Larsen & Toubro	2148.00	2520.00	19	Target achieved. Booked at 2565
19-Dec-22	Ambuja Cements	545.00	660.00	-8	Exit at 501.50
19-Dec-22	Federal Bank	136.00	168.00	16	Booked profit at 158.00
19-Dec-22	Sundaram Finance	2355.00	2890.00	23	Booked profit at 2870 (Div Rs 15)
19-Dec-22	Mishra Dhatu Nigam	222.00	295.00	34	Target hit. Booked at 298

## Yearly Technical performance for CY23

Total Recommendations: 9

Open: 0

Positive: 8

Strike Rate: 89%

Average return on positive calls: 21.4%

# **Yearly Quant picks**



#### **Yearly Quant Picks for 2023**

• Recommendations: 6

• Profits booked: 6

Stop loss Triggered: 0

• Open: 0

Success Rate: 100

Average return on positive calls: 25%

## Yearly Quant Picks performance in CY23

Date	Scrip	Action	Price	Target	Stop Loss	Last close	Return (%)	Time Frame	Remark
14 Dec 22	State Bank of India	Buy	610-625	790	460	638	3.7%	12 months	Profit booked
14 Dec 22	Мсх	Buy	1610-1655	2150	1260	2150	31.5%	12 months	Targt achieved
14 Dec 22	Bharat Forge	Buy	875-900	1150	730	1150	29.5%	12 months	Targt achieved
14 Dec 22	Sun Pharma	Buy	970-1000	1260	830	1260	27.9%	12 months	Targt achieved
14 Dec 22	Ltimindtree	Buy	4350-4450	5800	3620	5800	31.8%	12 months	Targt achieved
14 Dec 22	Hindalco	Buy	455-470	590	380	566	21.7%	12 months	Profit booked

#### One Click Portfolio: Techno-Funda & Momentum



#### **CY23 Performance**

Total Recommendations: 15

Open: 3

Positive: 12

Strike Rate: 100%

Average return of Portfolio: 14%

Key Highlights:

 Our PF on Large caps provided 9% returns in just seven sessions

 High conviction breakout PF4 and Metal PF garnered ~22% returns each outperforming respective benchmarks

Average return of Benchmark, during portfolio active period: 11%

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

Total Recommendations: 78

Open: 3

Positive: 73

Strike Rate: 97%

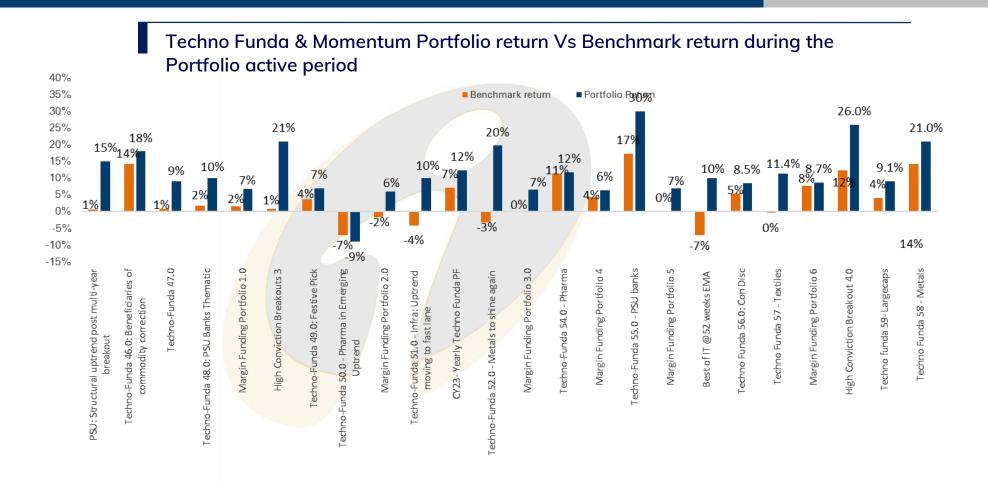
Average return of Portfolio: 12%

Average return of Benchmark, during portfolio active period: 10%

75% of the portfolios were closed within average 40 days

# One Click Technical Portfolio return Vs Benchmark return since FY23







Research Performance – Medium Term Investing

## **Gladiator Stocks: Consistent performers**



#### FY24 Performance

Recommendations: 101

Open: 5

Exit at cost: 4

Strike Rate: 89%

Average return on positive calls: 9.20%

Average return on negative calls: -6.9%

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

Recommendations: 926

Open: 5

Exit at cost: 28

Strike Rate: 78%

Average return on positive calls: 14.7%

Average return on negative calls: -8.4%

### **Quant Picks**



# CY23- Performance

- Number of Calls recommended: 42
- Positive payoff: 37
- Open: 5
- Success rate: 89%
- Average return on positive calls: 10%

# Performance since 2018

- Recommendations: 426
- Positive payoff: 311
- Open: 4
- Exit at cost: 8
- Success Rate: 74%
- Average return on positive calls: 11.5%



Research Performance – Short Term Trading

# **Margin Funding Picks**



#### **December Performance**

Recommendations : 9

• Open: 0

Exit at cost: 0

Strike rate: 100%

Average return on positive calls: 8.2%

# FY24 Pe<mark>rform</mark>ance

Recommendations : 78

Open: 0

Exit at cost: 0

Strike rate: 97%

Average return on positive calls: 7.5%

# Momentum Pick (Positional Recommendations)



#### **December Performance**

Recommendations: 36

Open: 1

Exit at cost: 1

Strike rate: 88%

Average return on positive calls: 6.8%

Average return on Negative calls: -3.7%

#### FY24 Performance

Recommendations: 274

Open: 1

Exit at cost: 14

Strike rate: 88%

Average return on positive calls: 5.8%

Average return on Negative calls: -4%



Research Performance – Intra Day Trading

# **Trading Calls (Intraday)**



### **December Performance**

Trading	Margin Calls & Derivat	tive calls
Total Calls		295
Positive Payoff		195
Open		0
Strike Rate		66%

## Derivatives Strategies (Positional F&O recommendations)



#### **December Performance**

No. of Calls: 71

Profits Booked : 55

Exit in loss : 0

Exit at cost : 0

Open/Not Initiated : 0

Success rate: 77.46%

#### **Stock Recommendations**

No. of Calls: 58

Profits Booked : 45

Exit in loss : 0

Exit at cost : 0

Open/Not Initiated : 0

Success rate: 77.58%

#### **Index Recommendation**

No. of Calls: 13

Profits Booked: 10

Exit in loss : 0

Exit at cost : 0

Open/Not Initiated : 0

Success rate: 76.92%

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

No. of Calls: 1534

Profits Booked : 1050

Exit in loss: 359

Exit at cost: 17

Open/Not Initiated : 31

Success rate: 70.51%

# **Expiry Index Calls**



#### December Performance

Recommendations: 68

Exit at cost: 3

Profits Booked: 37

Success Rate: 57%

### Performance since FY22

Recommendations: 2730

Exit at cost : 79

Profits Booked: 1881

Success Rate: 70.98%

# **Currency Derivatives**



#### December Performance

Recommendations: 79

Exit at cost : 0

Profits Booked : 59

Success Rate: 74.7%

### Performance since April 2020

Recommendations: 2302

Exit at cost : 28

Profit Booked: 1588

Success Rate: 68.98%

# **Commodity Derivatives**



#### August Performance

Recommendations: 160

Exit at cost : 0

Profits Booked : 110

Success Rate: 68.8%

### As on Date Performance

Recommendations: 5532

Exit at cost: 37

Profit Booked: 3715

Success Rate: 67.15%





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. Atul Agrawal Contact number: 022-40701000 E-mail Address: complianceofficer@icicisecurities.com For any queries or grievances: Mr. Prabodh Avadhoot Email address: headservicequality@icicidirect.com Contact Number: 18601231122

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