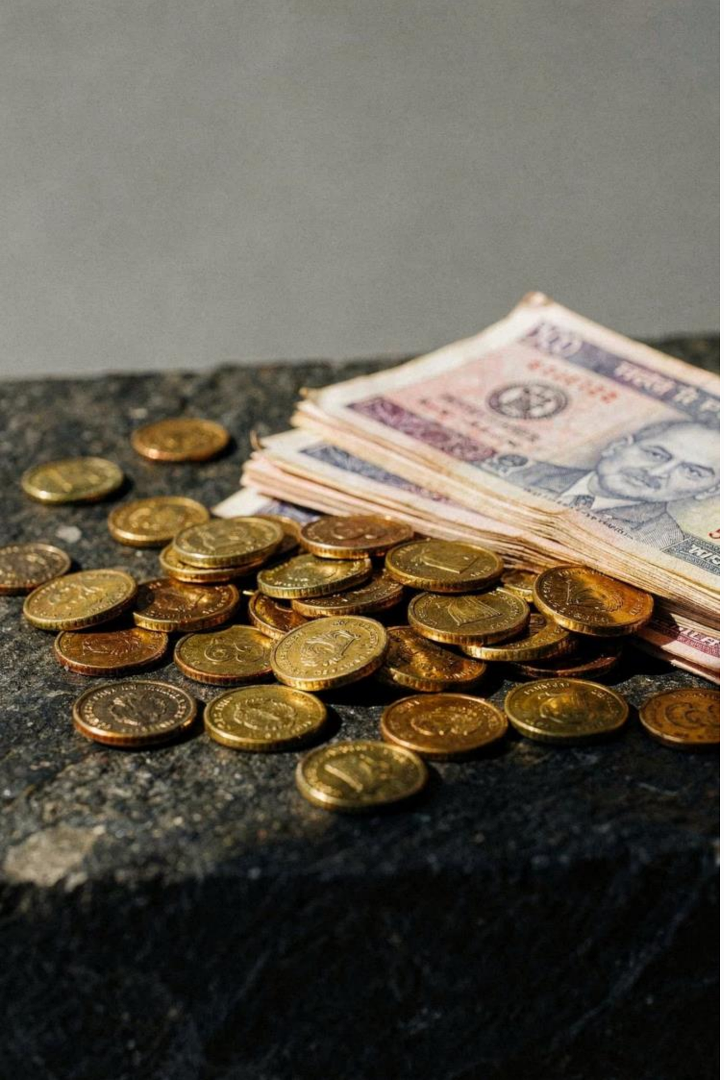
India's Double Discount — A Once-in-a-Decade Entry Point

MARKET INTELLIGENCE

The Rupee has fallen 30% in five years. Hundreds of quality stocks are down 20–50%. **Two discounts. One rare opportunity.**

BENEFIT from INSIGHT JAIN INVESTMENT



₹73 → ₹95.5

THE CURRENCY CATALYST

A **30% depreciation over five years** creates structural tailwinds — not headwinds.

Export Competitiveness

Indian goods become hyper-competitive on the global stage

Import Substitution

A natural tariff accelerating domestic manufacturing margins

Two Cycles. Generational Wealth.

HISTORY RHYMES

We are at the **genesis of a similar cycle** today.

1992 Cycle

1

Rupee devaluation **₹18→₹31** built the Indian IT sector into a global powerhouse.

2

2013 Cycle

Depreciation **₹54→₹68** triggered multi-bagger returns in Pharma, Auto Ancillaries, Specialty Chemicals & Engineering.

Today

3

Rupee at **₹95.5** — a 30% fall over five years. The next generational cycle begins now.

Our *Asymmetric* Positioning

PORTFOLIO STRATEGY

30%

Currency Discount

Lower entry cost for long-term capital allocators

188+

Stocks Discounted

Nifty 500 names trading 20–50% below recent peaks

Our AIF & PMS are deploying capital into bottom-up export and import-substitution beneficiaries — at steep valuation discounts, ahead of the earnings cycle.
