



Win over
market volatility

Edelweiss Balanced Advantage Fund

(An open ended dynamic asset allocation fund)



How do we invest?

- * We follow a process driven approach to shift the portfolio between equity and debt depending on market conditions
- * We try to maintain equity exposure between 30% to 80%
- * We invest more in equity when markets are moving up and switch to debt when markets are moving down
- * We invest in strong businesses - mostly large-cap companies on the equity side
- * We invest in high quality AAA rated bonds and similar securities on the debt side



How do you gain?

- * You get to grow your money when equity markets move up and protect it when they go down
- * You do not need to time the market as we move between equity and debt automatically
- * You can stay disciplined by overcoming emotional biases in uncertain markets
- You are looking for regular income via
- * Systematic Withdrawal Plan (SWP)



It is for you if

- * You are a beginner and want to cautiously invest in equities
- * You are a seasoned investor and want to gain from both rising and falling market
- * You want to make returns like equity but with relatively lower fluctuation in NAV



Risks: Think before you leap

- * In the short term, the fund can give negative returns
- * To overcome these risks, we advise you to invest for at least 3 to 5 years



Scheme Details



MINIMUM INITIAL INVESTMENT
₹5000/- per application & in multiples of `1/- thereafter



INCEPTION DATE
Regular Plan: 20-Aug-2009



BENCHMARK
CRISIL Hybrid 50 + 50 Moderate Index



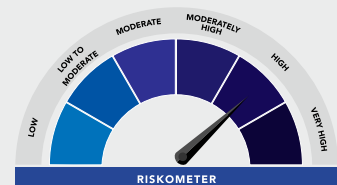
EXIT LOAD
For units in excess of 10% of the investment, 1% will be charged for redemption within 365 days

Know more on, www.edelweissmf.com

Edelweiss Balanced Advantage Fund is suitable for investors who are seeking*:

- To create wealth over long term and prevent capital erosion in medium term
- Investment predominantly in equity and equity related securities including through arbitrage opportunities with balance exposure to debt and money market securities

* Investors should consult their financial advisers if in doubt about whether the product is suitable for them



Investors understand that their principal will be at High risk

Sept 2021

Disclaimer:

Please note, Mutual Funds related services are not Exchange traded products and I-Sec is just acting as distributor to solicit Mutual Funds. All disputes with respect to the distribution activity, would not have access to Exchange investor redressal forum or Arbitration mechanism.

MUTUAL FUND INVESTMENTS ARE SUBJECT TO MARKET RISKS, READ ALL SCHEME RELATED DOCUMENTS CAREFULLY.