

3 timeless investing opportunities



MARKETSHARE GAINERS 



Invest in

Edelweiss Focused Equity Fund

(An open-ended equity scheme investing in maximum 30 stocks across market capitalization)

#TrulyFocused

NFO Period: 12th - 25th July, 2022



How do we invest?

- * We maintain a focused portfolio of 25 to 30 stocks that are selected basis a robust investment process
- * We follow a benchmark and sector agnostic approach for this fund
- * We follow a Multi Cap portfolio approach which gives us the flexibility to leverage opportunities across the large cap, mid cap, and small cap space
- * We construct the portfolio keeping in mind the three investment opportunities:



Brands

Established and emerging brands that hold sway with their customers



Marketshare Gainers

Established & emerging companies that either have significant market share or potential to rapidly grow their existing market share



Innovators

Businesses that are drivers, adaptors & enablers to innovation



How do you gain?

- * You get to invest in robust investment opportunities that can deliver good long-term growth
- * You get the diversification benefits as the fund invests across market caps and is both size as well as sector agnostic
- * You get to invest in a mix of established and emerging companies that can potentially generate significant returns over the long-term



It is for you if

- * You want to take a focused exposure to well established brands, market share gainers and innovators.
- * You are not bothered by short-term volatility.
- * You will invest for 5 years or more



Investment Philosophy

- * **Forensics** - Use forensics framework to check accounting quality, board governance standards and ownership background
- * **Acceptable Price** - Focus on reasonably priced businesses with medium term earnings power rather than short term and be value/growth style agnostic
- * **ESG Informed** - Be informed on ESG factors for businesses that we like to invest and its impact on the environment and humans at large
- * **Robustness** - Pick well managed businesses having scalable opportunities and superior return on capital employed



Scheme Details



MINIMUM INITIAL INVESTMENT

₹5000/- per application & in multiples of ₹1/- thereafter



BENCHMARK

NIFTY 500 TRI



EXIT LOAD

1% upto 1 year.
NIL after completion of 1 year



FUND MANAGERS

Mr. Trideep Bhattacharya & Mr. Abhishek Gupta

Distribution Partner -  **ICICI direct.com**
Investments at Your Fingertips

Edelweiss Focused Equity Fund is suitable for investors who are seeking*:

- Long term capital appreciation
- To generate income by investing in equity and equity related instrument and derivative segment of upto 30 companies

* 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 Very High risk

The above is the investment ideology which will be followed by the fund manager. However, this can change based on market dynamics, economic scenarios etc. For detailed investment strategy, risk factors of the schemes please refer to SID available on website. The representational logos used does not imply any affiliation or endorsement by the brands. These are for illustration purpose only.

Mutual Fund Investments are subject to market risks, read all scheme related documents carefully.