

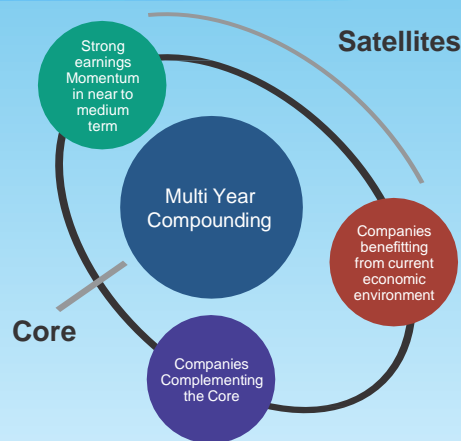


One Investment that gives you a Dual-strategic advantage

# Alpha Core & Satellite Portfolio

Gain from opportunities in short and long term, with one investment that gives you a perfect blend of both. Core portfolio ensures wealth creation by investing in high-quality businesses for long term and Satellite portfolio seeks to explore profits and rebalancing with businesses that gain from changing economic cycles.

**A selection of competitive stocks that aim to give you superior risk-adjusted returns.**



## Alpha "Core & Satellite" Portfolio

**Core Portfolio (70%)**  
High Quality Growth Portfolio

**Satellite Portfolio (30%)**  
Tactical Satellite Portfolio

### Zero Tolerance on "Quality"

- Investment in long term wealth creators
- Companies which are leaders, have competitive edge and generate superior ROCE
- Buy and Hold portfolio (2-3 years)

- Cyclical business which would benefit from current economic cycle
- Companies which witness strong earnings growth led by sectoral tailwinds
- Short term tactical calls (6-12 months)

### KEY FEATURES



Benchmark  
Nifty 200



No. of Stocks  
15-20



Investment Horizon  
Medium to Long Term

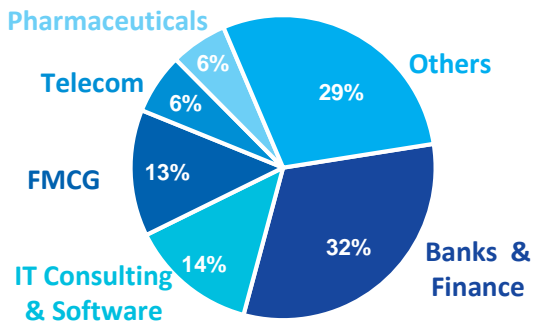


Focused Multicap  
Portfolio



Expected  
CAGR 15-20%\*

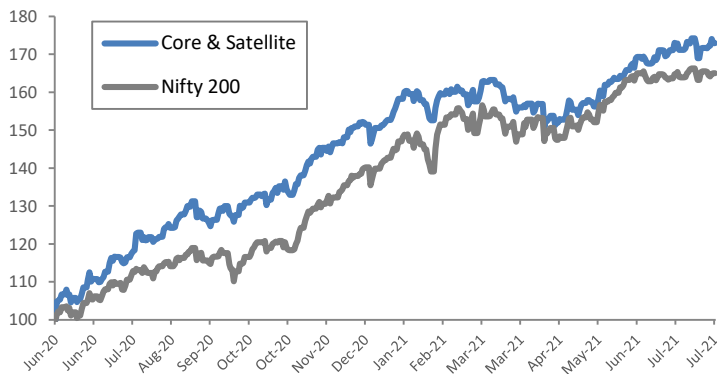
## Sectoral Allocation



## Top 5 Holdings

Stocks	Holdings %
Aditya Birla Fashion & Retail Ltd.	7.71 %
State Bank Of India Ltd	6.49%
Bharti Airtel Ltd	6.43%
ICICI Bank Ltd	6.08%
Sun Pharmaceutical Industries Ltd	6.04%

## Performance



## Returns

%	1 Month	3 months	1 Year	Since Inception
Portfolio	1.9	11.3	42.0	73.0
Benchmark (Nifty 200)	0.8	9.3	46.9	65.0

# Portfolio Inception Date - 1<sup>st</sup> June 2020

## Investment Mode

	LUMP SUM	SIP
Op on	One Time Investment	Monthly
Min Amount	5,00,000	1,00,000
Top Up	Min 1,00,000 & in multiples of 1,000	N/A

## Fees & Charges

	FIXED
Fees	2.5% p.a. (Chargeable Half yearly - 1.25%)
Brokerage	As applicable at actual
Exit Load	NIL

## Investment Core Team



### Pankaj Murarka

Founder & CIO, Renaissance Investment Managers

Pankaj is the founder of Renaissance Investment Managers. He has over 21 years of experience in Fund Management and has several accolades to his credit. He was awarded as Best Fund Manager – Runner up Award for Axis Midcap Fund by Outlook Money in 2014. The fund delivered a CAGR return of 24% (2011-2015) significantly outperforming the benchmark and was a top decile fund for 2012 & 2013. It was ranked the No. 1 performing fund in India across all funds in 2014 on 3 year basis. He was also recognized by Outlook Money as a Leading Fund Manager with 5 years of track record of consistent performance in the year 2015. Pankaj was associated with Axis Mutual Fund as the Chief Investment Officer(CIO) managing over \$2bn in Indian Equities.



### Pawan Parakh

Portfolio Manager

Pawan has over 15 years of experience in equity research and fund management. He drives the fund management function at Renaissance. He started his capital markets career as an equity analyst with Edelweiss Securities. He has had the privilege of working with marquee organizations like HDFC, HSBC and Deloitte amongst others. As part of his research process, Pawan actively interacts with company managements, industry experts, technocrats and bureaucrats to understand the nuances of businesses. He likes to do field and factory visits to enhance his business understanding. Pawan is a meritorious Chartered Accountant (all-India 48<sup>th</sup> Rank holder). He has also cleared CFA exams from CFA Institute (Virginia, USA).



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**Risk Factors:**  
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