

Invest in key opportunities that rise when India unlocks

Alpha “Dynamic Thematic” Portfolio Theme 01: Unlock India

As the new normal set in, certain businesses stand to gain more than the rest. Alpha Thematic Portfolios, with its Unlock India theme, seeks to invest in stocks that stand to gain from current macro-economic, environmental, and sectoral trends. The objective of the fund is to select the theme that is an uptrend and select high-quality companies in that particular theme.

Unlock India Strategy



Economy has seen 2 lockdowns in last 15 months



Economy to start unlocking from July'21



Vaccination will accelerate from mid - June & by March'22 – India to achieve herd immunity



Companies which will benefit from unlocking

Unlock India: Stocks Selection Criteria

01

Strong growth as economy unlocks

02

Business Leaders

03

Strong and Resilient Balance Sheet

04

Emerge Stronger from Crisis

05

Winners of New Normal

Key Features



Benchmark
Nifty 200



No. of Stocks
15-20



Investment Horizon
Medium to Long Term

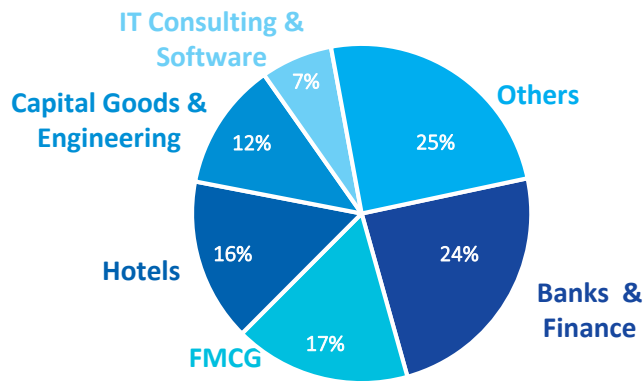


Focused
Multicap
Portfolio



Expected
CAGR
15-20%*

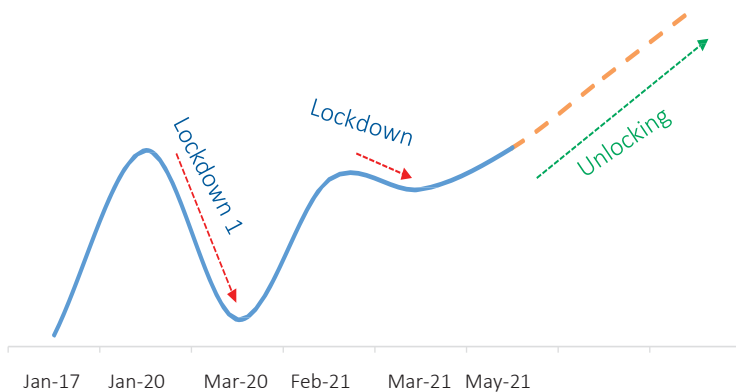
Sectoral Allocation



Top 5 Holdings

Stocks	Holdings %
Aditya Birla Fashion & Retail	7.6%
Larsen & Toubro	7.1%
Indian Hotels Company	6.9%
Indian Railway Catering & Tourism Corporation	6.8%
VIP Industries	6.3%

Backtested Performance



Returns

Backtested Returns

Jan'17 - Jan'20	79
Feb'20 - March'20	-40
April'20 - March'21	52

Actual Returns

%	1 Month	Since Inception
Portfolio	2.0	5.6
Benchmark	0.8	2.3

Portfolio Inception Date - 1st June 2021

Investment Mode

	LUMP SUM	SIP
Option	One Time Investment	Monthly
Min Amount	2,00,000	20,000
Top Up	Min Rs 20,000 & in multiples of Rs 1000	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
Fund Manager

Pawan has over 15 years of experience in equity research and fundmanagement. He drives the fundmanagement 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 among 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 48th Rank holder). He has also cleared CFA exams from CFA Institute (Virginia, USA).



Email ID: happy2help@alphaportfolio.in

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Disclaimer*

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Risk Factors*

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