

# 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

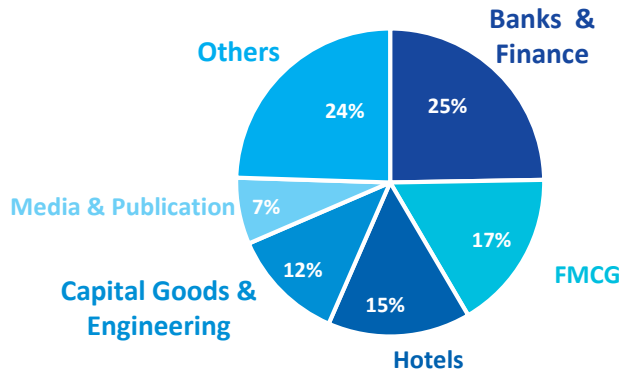


Focused Multicap Portfolio



Expected CAGR 15-20%\*

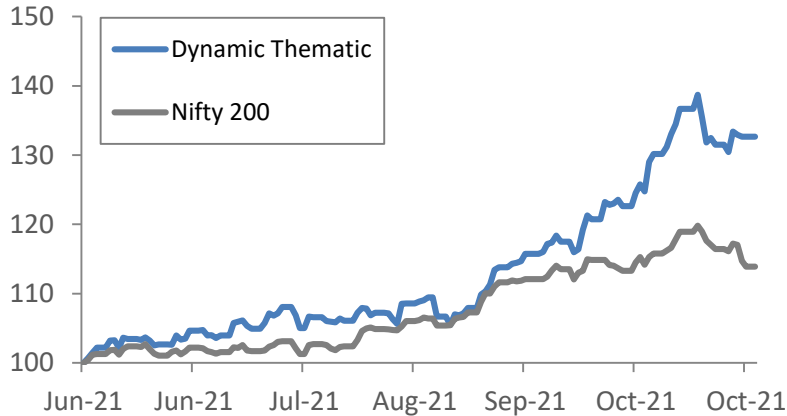
## Sectoral Allocation



## Top 5 Holdings

| Stocks                            | Holdings % |
|-----------------------------------|------------|
| Aditya Birla Fashion & Retail Ltd | 7.25%      |
| Inox Leisure Ltd                  | 6.98%      |
| Larsen & Toubro Ltd               | 6.96%      |
| State bank of India Ltd           | 6.81%      |
| VIP Industries Ltd                | 6.71 %     |

## Performance



## Returns

| %                     | 1 Month | 3 Month | Since Inception |
|-----------------------|---------|---------|-----------------|
| Portfolio             | 7.4     | 25.0    | 32.0            |
| Benchmark (Nifty 200) | 0.2     | 11.2    | 13.8            |

# Portfolio Inception Date - 1<sup>st</sup> June 2021

## Investment Details

|                |              |
|----------------|--------------|
| Min Investment | Rs. 2,00,000 |
| SIP            | Available    |

## Fees & Charges

|           |                         |
|-----------|-------------------------|
| Fees      | 2.5% p.a.               |
| Brokerage | As applicable at actual |

## Investment Core Team



### Pankaj Murarka

Founder & CIO,  
Renaissance Investment Managers



### Pawan Parakh

Portfolio Manager,  
Renaissance Investment Managers

Pankaj is the founder of Renaissance Investment Managers. He has over 25 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 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 48th Rank holder). He has also cleared CFA exams from CFA Institute (Virginia, USA).



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#### Disclaimer\*:

The performance/returns of the stock across Individual portfolios may vary significantly from the data depicted above. No claims may be made or entertained for any variances between the above performance depictions and that of the stock within individual client portfolios neither the Investment Advisor, nor its Directors, employees shall in any way be liable for any variation noticed in the returns of individual portfolios. Performance of RIMPL shall have no bearing on the expected performance of the fund. Past performance of the financial products, instruments and the portfolio may or may not be sustained in future and should not be used as a basis for comparison with other investments.

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