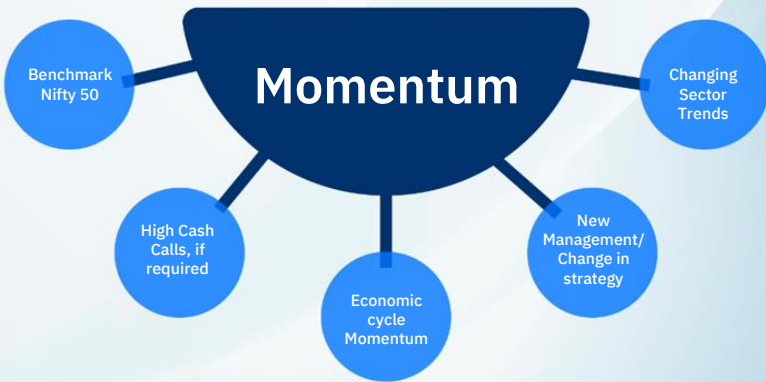**ALPHA PORTFOLIOS**
Renaissance

ALPHA MOMENTUM

FUND OBJECTIVE

Alpha Momentum is a concentrated portfolio of companies which have strong earnings momentum in their favour or are beneficiaries of current economic/ sectoral trends. The portfolio companies could be beneficiary of other tailwinds like changing sectoral trends or change in management amongst others. While the portfolio would invest into high quality growth companies, it would keep booking profits on a timely basis. The objective is to ensure investor value creation is not constrained by market volatility. The portfolio aims at generating superior absolute returns. The portfolio shall be actively managed with moderate to high portfolio turnover ratio.

KEY FEATURES

Momentum

- Benchmark Nifty 50
- Changing Sector Trends
- High Cash Calls, if required
- Economic cycle Momentum
- New Management/ Change in strategy

PORTFOLIO INDICATORS

Benchmark Nifty 50

No. of Stocks 15-20

**Investment Tenure Medium - Long Term**

Expected CAGR 15-20%*

SECTORAL ALLOCATION

- Banks & Finance: 25%
- FMCG: 16%
- Automobiles & Logistics: 9%
- Pharmaceuticals: 9%
- Media & Publication: 8%
- Others: 33%
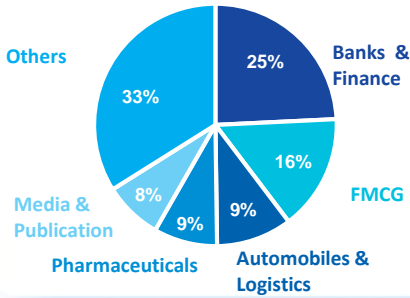
TOP 5 HOLDINGS

Stock	Holding %
Sun Pharmaceuticals Industries Ltd.	9.02%
Aditya Birla Fashion & Retail Ltd.	8.55%
Inox Leisure Ltd.	8.07%
United Spirits Ltd.	7.04%
State Bank Of India Ltd.	6.70%

PERFORMANCE

- Momentum
- Nifty 50
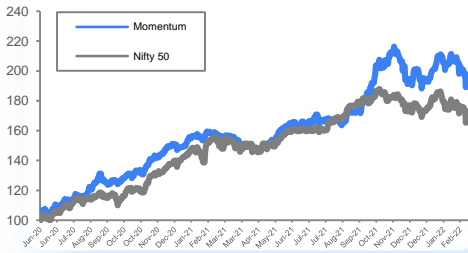
RETURNS

%	1 Month	3 Month	1 Year	Since Inception
Portfolio	-4.9	2.8	28.3	97.5
Benchmark (Nifty 50)	-3.1	-1.1	15.6	70.9

Portfolio Inception Date: 1st June, 2020

INVESTMENT DETAILS

Min Investment	Rs. 1,00,000
SIP	Available

FEE & CHARGES

Fee	2.5% p.a
Brokerage	As applicable as actual

INVESTMENT CORE TEAM

Pankaj Murarka
Founder & CIO, Renaissance Investment

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 Parakh
Portfolio Manager, Renaissance Investment Managers

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).

Email ID: happy2help@alphaportfolio.in