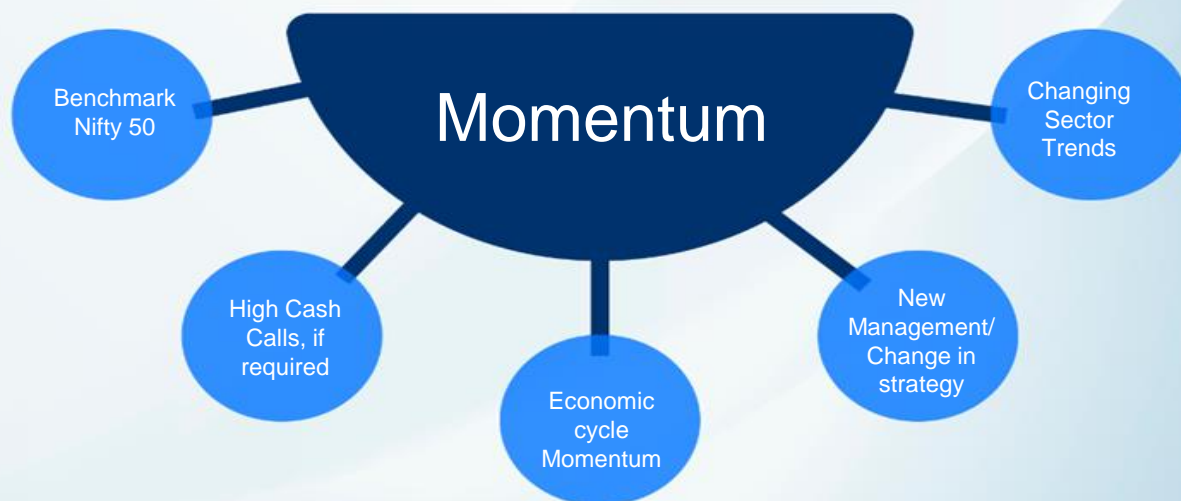


# ALPHA MOMENTUM

## 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



## PORTFOLIO INDICATORS



Benchmark  
Nifty 50



No. of Stocks  
15-20

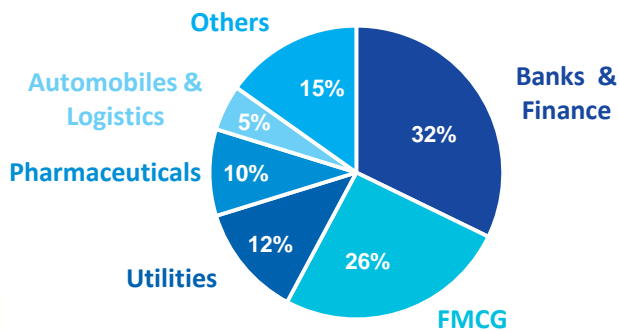


Investment Tenure  
Medium - Long Term



Expected CAGR  
15-20%\*

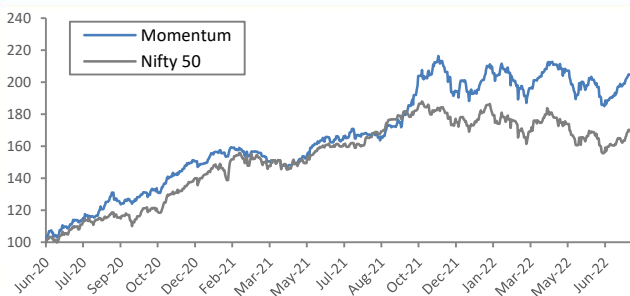
## SECTORAL ALLOCATION



## TOP 5 HOLDINGS

Stock	Holding %
ITC Ltd.	11.64
Sun Pharmaceuticals Industries Ltd.	9.55
Aditya Birla Fashion & Retail Ltd.	8.11
HDFC Bank Ltd	7.57
State Bank of India	6.94

## PERFORMANCE



## RETURNS

%	1 Month	6 Months	1 Year	2 Year CAGR
<b>Portfolio</b>	9.6	0.4	24.3	33.9
<b>Benchmark (Nifty 50)</b>	8.7	-1.0	8.9	24.5

Portfolio Inception Date: 1<sup>st</sup> 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](mailto:happy2help@alphaportfolio.in)

SEBI Registered Investment Advisor (Reg No.:- INA 000014827) | SEBI Registered Portfolio Managers (Reg No.:- INP 000005455) | Cat III Alternate Investment Fund (Reg No.:- IN/AIF3/1819/0549)

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 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.

Risk Factors\*:

The value of the investments may be affected generally by factors affecting financial markets, such as price and volume, volatility in interest rates, currency exchange rates, changes in regulatory and administrative policies of the Government or any other appropriate authority (including tax laws) or other political and economic developments. RIMPL is not liable or responsible for any loss or short resulting from the operation of the fund. This document represents the views of Renaissance Investment Managers Private Limited and must not be taken as the basis for an investment decision.