July 2022

Invest in key opportunities that rise with changing dynamics

ALPHA PORTFOLIOS
Renaissance

Alpha "Dynamic Thematic" Portfolio

Theme 01: Unlock India (1st June 2021 – 17th June 2022)

Current Theme : Growth & Income

Growth & Income

Growth

SUSTAINABLE QUALITY GROWTH AT REASONABLE PRICE

- Indian GDP growth of 7% in next 3 years
- Focus on investing in growth sectors
  - ✓ Consumer Discretionary
  - ✓ Capital Goods
  - ✓ Financials
  - ✓ IT & Retail

+

Income

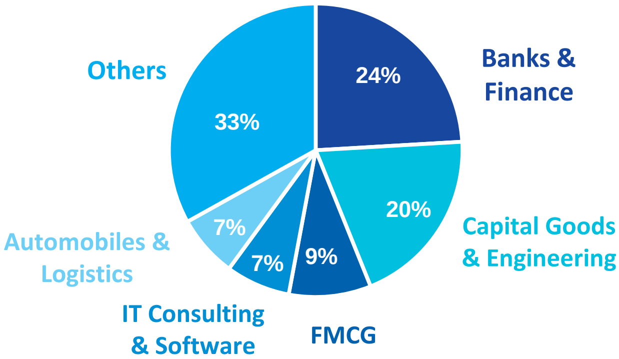
INFLATION HEDGE

- Focus on Income Yields
- Business with strong pricing power
  - ✓ Utilities
  - ✓ Telecom
  - ✓ Pharmaceuticals
  - ✓ Real Estate

Key Features

- **Benchmark** Nifty 200
- **No. of Stocks** 15-20
- **Investment Horizon** Medium to Long Term
- **Focused Multicap Portfolio**
- **Expected CAGR** 15-20%*

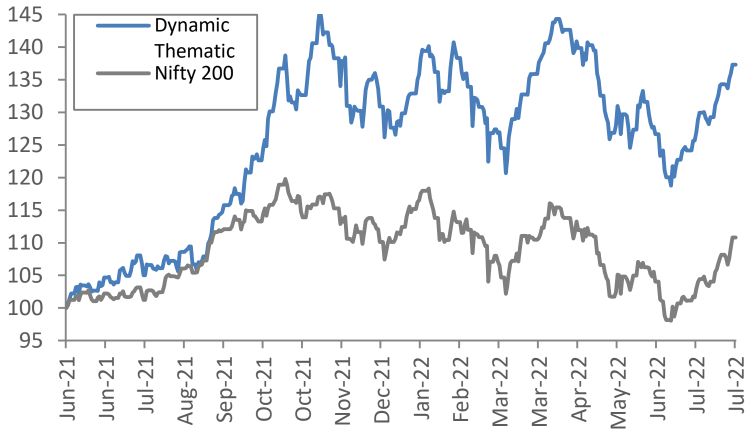
Sectoral Allocation



Top 5 Holdings

Stocks	Holdings %
ITC Ltd	9.05%
State Bank of India	8.04%
ICICI Bank Ltd	7.55%
Sun Pharmaceuticals Ltd	5.87%
Reliance Industries Ltd	5.69%

Performance



Returns

%	1 Month	3 Month	1 Year	Since Inception CAGR
Portfolio	10.6	-2.1	29.4	30.6
Benchmark (Nifty 200)	9.6	-0.4	8.2	9.1

 # Portfolio Inception Date - 1st 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

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).

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