

Formidable Dozen+

Factsheet As of 31st Dec. 2024

• Overview

Achieve returns higher than fixed income by investing in a portfolio of 15-20 mega-cap stocks.

• Rationale

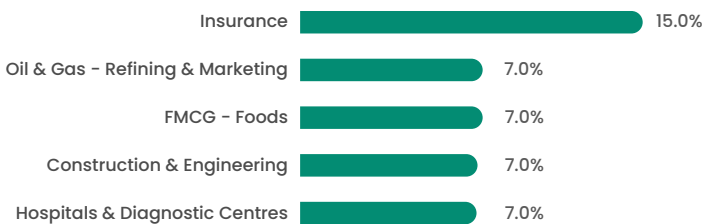
As India's share of global GDP expands over the next five years, so will the market capitalization of its stock market. The mega-cap stocks are poised to generate significant wealth over the next 5-10 years, strengthening their leadership and competitive edge. These companies operate with stable and defensive business models, offering investors a strong likelihood of earning returns far higher than those from fixed income options. Each stock in the portfolio has been carefully selected through detailed research, and the portfolio is structured to minimize risk while optimizing returns.

Min Investment	: INR 2,00,000
Fees	: 2.5% of Avg. AUM Per Year, Paid Monthly
SIP Option	: Available after min. investment of INR 2,00,000.
Min SIP	: INR 50,000

• Top 5 Stocks

Security	Sector
Reliance Industries Ltd.	Oil & Gas - Refining & Marketing
Nestle India Ltd.	FMCG - Foods
Larsen and Toubro Ltd.	Construction & Engineering
Divi's Laboratories Ltd.	Labs & Life Sciences Services
Apollo Hospitals Enterprise Ltd.	Hospitals & Diagnostic Centres

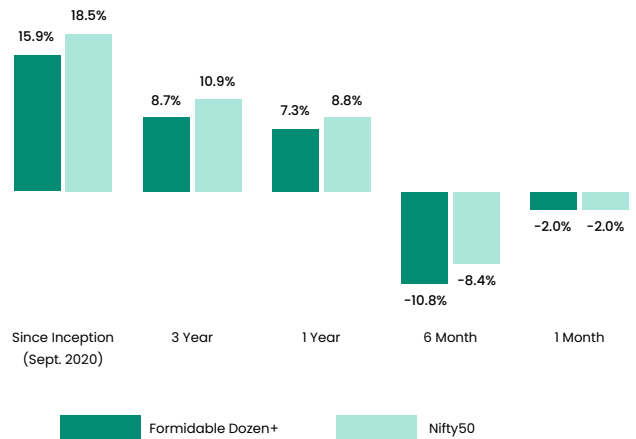
• Sector Breakup



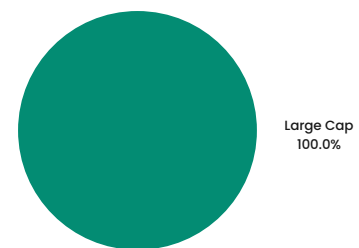
• Defining The Universe

Our selected universe consists of stocks with a market capitalization exceeding Rs. 1 lakh crore. These companies are profitable, growing, and dividend-paying, with a dominant presence in their respective industries. They boast a stellar track record of creating shareholder value for over two decades and are led by highly accomplished professional management teams.

• Strategy vs Benchmark



• Market Cap Breakup



• Riskometer

