



► What is Zodiac?

An intelligent portfolio of 12 Nifty Stocks dynamically created by a combination of fundamental screening and a quant model.

Key Features



Strategy to dynamically invest in 12 Nifty 50 companies on a daily basis



Fundamental research combined with quant model to avoid biases



In case quant model doesn't find opportunity in Nifty stocks, allocation for those stocks will be done to Nifty Bees.



Active management to review portfolio stocks

► Investment Universe, Process & Strategy:

- Dynamic portfolio comprising of 12 Nifty stocks in equal weights
- Identifying stocks through fundamental screening and a quant model based on parameters like growth in earnings, sectorial preference, momentum and volatility factors
- Maximum exposure of 25% in a particular sector, Maximum 3 stocks from a sector and minimum 5 sectors at portfolio initiation.

USP



Dynamic Portfolio of 12 winning stocks from Nifty 50 basket



Core Fundamental research combined with Quant Model for Decision making to avoid Human Bias



Active management to review portfolio stocks

► Rebalancing Strategy:

- When Potential upside is achieved.
- If Stock is excluded from Nifty Index.
- In case Nifty Bees is part of portfolio it will be replaced when a new Stock opportunity with potential is identified.
- Stock Price corrects by more than tolerance levels

► For Whom?

Investors with a moderate risk appetite and an investment horizon of minimum 3-5 years

► Basic Details

NO. OF STOCKS

12

BENCHMARK

Nifty 50

RISK

Moderate

TIME FRAME

3-5 years

Top Stock Holding



The securities quoted are for illustration only and are not recommendatory

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LUMP SUM

 **Option:** One Time Investment



Subscription mode: Upfront Subscription



Withdrawal: Full or Partial

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