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AXIS EQUITY HYBRID FUND

An open-ended hybrid scheme investing predominantly in equity and equity related instruments



NEW FUND OFFER OPENS ON	July 20, 2018
NEW FUND OFFER CLOSES ON	August 02, 2018
FUND CATEGORY	Aggressive Hybrid Fund
TYPE OF SCHEME	open-ended hybrid scheme investing predominantly in equity and equity related instruments
INVESTMENT OPTIONS	Growth Option Dividend Option (Payout and Reinvestment)
EXIT LOAD	<p>If redeemed/ switched out on or before 12 months from the date of allotment:</p> <ul style="list-style-type: none"> ➤ For 10% of investment: Nil ➤ For remaining investment: 1% <p>If redeemed/ switched out after 12 months from the date of allotment: Nil</p>

INVESTMENT OBJECTIVE OF THE SCHEME

Axis Equity Hybrid Fund intends to generate long term capital appreciation along with current income by investing in a mix of Equity and Equity related Instruments, debt instruments and money market instruments.

INVESTMENT ALLOCATION & STRATEGY

Under normal market circumstances, the fund will follow the below asset allocation pattern:

ASSET CLASS	MINIMUM	MAXIMUM
Equity & Equity Related Securities	65%	80%
Debt & Money Market Instruments	20%	35%

*Of Equity & Equity Related Securities

INVESTMENT STRATEGY

- Axis Equity Hybrid Fund proposes to invest in a diversified portfolio of debt & money market instruments to generate income
- The portfolio duration and credit exposures will be decided based on a thorough research of the general macroeconomic condition, political and fiscal environment, systematic liquidity, inflationary expectations, corporate performance, and other economic considerations\
- The equity allocation will be managed actively. The focus would be to build a diversified portfolio of strong growth companies, reflecting attractive investment ideas, at all points of time
- The portfolio is built utilizing a bottom-up stock selection process, focusing on appreciation potential of individual stocks from a fundamental perspective
- The AMC employs a “Fair value” based research process to analyze the appreciation potential of each stock in its universe. The universe of stocks is carefully selected to include companies having a robust business models and enjoying sustainable competitive advantages as compared to their competitors

The performance of the scheme will be benchmarked to the CRISIL Balanced Fund Index.

ABOUT THE FUND MANAGERS

Mr. Shreyash Devalkar, Mr. Ashish Naik will be the fund managers for the equity portion) and **Mr. R. Sivakumar** will be the fund manager for the debt portion

Mr. Shreyash Devalkar is Fund Manager at Axis AMC. He has over one decade of experience in fund management and equity research. In previous assignments, he was associated with BNP Paribas Mutual Fund, IDFC Mutual Fund, and IDFC Securities. He is a Bachelor in Chemical Engineering and a Master in Management Studies. He also manages five other equity funds (including close-ended schemes).

Mr Ashish Naik has been associated with Axis AMC since August 2009. He comes with about a decade of experience in equity research. In the past, he has worked with Goldman Sachs India Securities. He is a B.E. and a PGDM, XLRI. He manages/co-manages 6 other hybrid schemes of the fund house.

Mr R. Sivakumar is Head- Fixed Income at Axis Mutual Fund. He joined the fund house in August 2009 and has a total experience of nearly two decades. In the past, he has worked with ABN Amro Asset Management, Sundaram Asset Management and Zurich Asset Management. By qualification, he is a B.Tech (IIT, Madras), and PGDM (IIM, Ahmedabad). He manages/co-manages eight other schemes of the fund house.

FUND SUITABILITY

- The fund is suitable for moderate-to-high risk investors with an investment horizon of 1-3 years or more
- The active asset allocation of equity and debt helps negotiate the ups and downs of the market
- The periodic rebalancing of the fund helps to lower the overall risk of the portfolio thus making the fund risk-efficient and tax-efficient as well
- Through active asset allocation, the fund aims to limit the impact of potential losses from market downturns
- Access to a special feature known as Automatic Encashment Plan, through which investors can redeem a fixed percentage of the investment value on a monthly basis. Unlike dividends, the investor can decide the amount of monthly cashflow and frequency of withdrawal. This is tax-efficient as well.

***To invest in this fund, kindly get in touch with**

Deepak Chellani (Product Head) **022-6632 2285** | Mail us at **MFSS@plindia.com**

PRODUCT LABELLING

FUND NAME	PRODUCT LABELING THIS PRODUCT IS SUITABLE FOR INVESTORS WHO ARE SEEKIN*		Riskometer
AXIS EQUITY HYBRID FUND (An open-ended hybrid scheme investing predominantly in equity and equity related instruments)	Capital appreciation along with generation of income over medium to long term.	Investment in equity and equity related instruments as well as debt and money market instruments.	 <p>Investors understand that their principal will be at moderately high risk</p>
<p>*Investors should consult their financial advisers if in doubt about whether the product is suitable for them.</p>			

DISCLAIMER (Mutual Funds are subject to market risks, please read all scheme related documents carefully).

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