



**EDELWEISS MAIDEN
OPPORTUNITIES FUND –
SERIES 1 - NFO**

WHY INVEST IN THIS FUND?

Key Features

- This is a unique fund focusing on investing in recently listed and upcoming IPOs through a process driven approach
- Portfolio construct will invest up to 80% in maiden ideas from recently listed companies and up to 15% in new IPOs to capture listing and future potential gains
- Fund Manager may hedge the portfolio up to 5% by buying long dated put options to hedge market risk
- Fund manager will aim for systematic portfolio rebalancing to ensure profit booking through dividend payouts
- Portfolio will be diversified across sectors and market caps and will comprise of the best 20-30 stocks after a thorough research process
- Currently IPO activity is at a decade high in terms of number of IPOs and the total amount of money raised and may remain buoyant due to increased FII participation in the primary market and IPOs being a favored route for PE/VC investors to exit
- BSE IPO Index has outperformed Nifty 500 TRI (total returns index) by 104% on an absolute basis since the start of this bull cycle from January 2014 to Dec 15, 2017 (Source: Edelweiss AMC and Bloomberg)
- Fund Managers: Bhavesh Jain and Bharat Lahoti
- Benchmark: Nifty 500 TRI
- Tenure: 3 years closed ended (maturity date: June 28, 2021)
- Min. application: Rs 5,000/-
- Liquidity: Listing on NSE.
- NFO period: Feb 2 to Feb 16, 2018
- Submission on filled appl. Forms: Offices of Edelweiss AMC OR Karvy (details mentioned in form attached)

Recommendation

- We recommend this fund with a 3 year time horizon for investors with moderate to high risk profile and desiring superior returns with lower volatility from a portfolio of quality IPOs as well as recently listed companies.

Contact

To invest in this fund kindly get in touch with Prashant Mehta (022 6632-2341) or mail us at MFSS@plindia.com