



Form is the one factor that makes all the **DIFFERENCE**

- Ian Thorpe
Australian Olympic swimmer



Good form is the foundation of winning

- Vince Lombardi
former Green Bay Packers football coach



When you're in good form, everything seems to click. You feel confident and can take on anything

- Michael Jordan
former NBA basketball player

TO AIM FOR PERFORMANCE PICK PLAYERS IN FORM

Invest in

Samco Active Momentum Fund

(An open-ended equity scheme following momentum theme)

India's 1st active momentum fund aims to invest in stocks that show momentum characteristics such as breakouts, price leadership, etc. using a proprietary **momentum-seeking algorithm** to generate superior risk-adjusted returns.

NFO Opens on **15/06/2023**

NFO Closes on **29/06/2023**

💡 Subscriptions in this scheme shall be accepted during NFO & be restricted post NFO until further notice.

Key Highlights of Samco Active Momentum Fund Strategy



SPEED AND AGILITY

The scheme will rebalance in real time as soon as the system detects a gain or loss of momentum in a particular stock.



HEDGE IN ANTI-MOMENTUM

The scheme will hedge to protect the downside when there is no or low momentum in the markets.



FINDS MOMENTUM EVEN FROM HIDDEN GEMS

The proprietary momentum-seeking algorithm scans a universe of 750 stocks, including MicroCaps to find stocks that are gaining momentum.

To invest or know more contact -

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"The momentum factor has been one of the strongest generators of excess returns." - MSCI

- Momentum is one of the most persistent factor to generate excess returns in all assets be it equity, commodity and forex and over 215+ years of history.
- MSCI research shows, on a historical basis, the momentum factor has been one of the strongest generators of excess returns and has beaten the base index by 10X.



Source: MSCI, Samco Research. Price data for MSCI World Index and MSCI Momentum index from June 1994 till March 2023. Disclaimer: Past returns are no indication of future returns. The index returns do not indicate returns of the scheme and are only mentioned for illustration of momentum as a factor.

Historically the two momentum indices from NSE (India) also beat the broader markets as well as their base indices by a huge margin.



Source : Nifty Indices, Samco Research Disclaimer: Returns mentioned are CAGR returns from 1st April 2005 till 28th April 2023. Past returns are no indication of future returns. The index returns do not indicate returns of the scheme and are only mentioned for illustration of momentum as a factor.

Active has several advantages over passive investing

Particulars	Active	Passive
Exposure	Invested only during times of Momentum, out of markets when there is Anti-Momentum	Invested 100% of times
Rebalancing	As and when needed	Lagged at 6-months
Types of momentum used	Uses both Relative & Absolute Momentum	Uses only Relative Momentum
No. of stocks	Not fixed, based on capital and position sizing	Currently only upto 50 stocks
Universe	No restrictions. Invest across market capitalisations i.e. Large Caps, Mid-Caps, Small Caps and Micro Cap companies	Limited universe only

Scheme Features

NFO Period	15 th June 2023 to 29 th June 2023	Min. Application Amount	₹5000 and in multiples of ₹1/- thereafter
Type Of Scheme	An open-ended equity scheme following momentum theme	Minimum Additional Application Amount	₹500 and in multiples of ₹1/- thereafter
Plans	Regular Plan - Growth & Direct Plan - Growth	Entry Load	Not Applicable
Minimum SIP Amount	₹500 and in multiples of ₹1/- thereafter [Fresh SIPs restricted post NFO, until further notice]		
Exit Load	<ul style="list-style-type: none"> 2.00% if the investment is redeemed or switched out on or before 365 days from the date of allotment of units. 1.00% if the investment is redeemed or switched out after 365 days but on or before 730 days from date of allotment of units. No Exit Load will be charged if investment is redeemed or switched out after 730 days from the date of allotment of units. 		
Fund Manager	Mr. Paras Matalia (C.A.)	Benchmark Index	Nifty 500 Index TRI

This product is suitable for investors who are seeking* :

- Long Term Capital Appreciation;
- An actively managed thematic equity scheme that invests in stocks exhibiting momentum characteristics

*Investors should consult their financial advisers if in doubt about whether the product is suitable for them.

(The product labelling assigned during the New Fund Offer is based on internal assessment of the scheme characteristics or model portfolio and the same may vary post NFO when actual investments are made)



Mutual fund investments are subject to market risks, read all scheme related documents carefully.

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