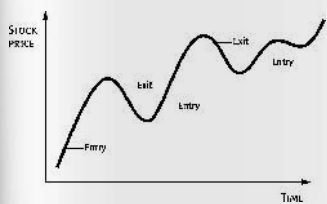


**Let those in form,
form your portfolio**

AXIS MOMENTUM FUND

NFO PERIOD: 22nd Nov to 6th Dec 2024



**Buy High,
Sell Higher**

Understanding Momentum Investing

Recent winners in stock markets will continue to remain winners in the near term, and similarly losers will remain losers.

Momentum factor investing refers to taking advantage of this market behaviour to generate better returns than markets.

It is essentially based on owning securities that have shown favourable price trends.

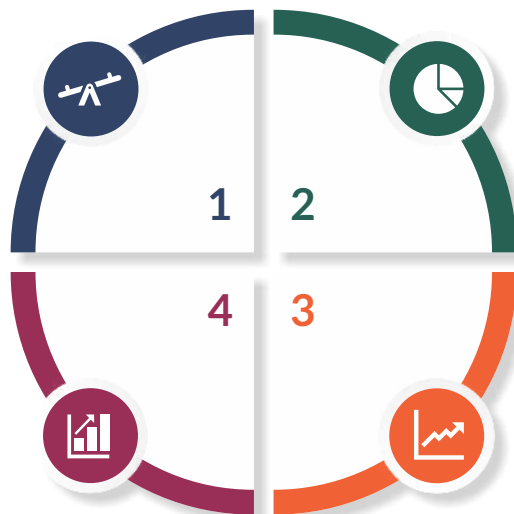
Highlights of Momentum investing

Momentum adapts to different styles

Momentum picks up different factor styles (Quality/Value) depending on the phase of the cycle.

Momentum need not significantly underperform in negative market phases

83% of times Momentum Strategy has outperformed NIFTY 500 in last 18 calendar years.³



Momentum adapts to different market caps

Momentum picks up different market cap depending on the phase of the cycle¹.

Momentum strategy has generated better risk adjusted return

Nifty200 Momentum 30 TRI has delivered better risk adjusted return than broader indices over longer time horizon².

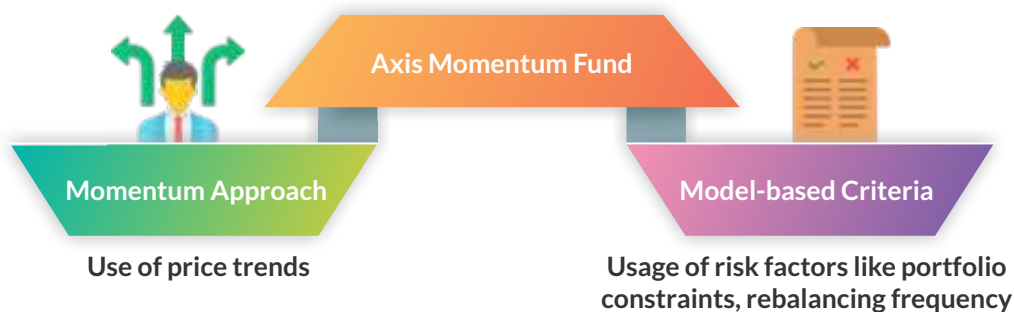
Past performance may or may not be sustained in the future. The above information should not be construed as promise, guarantee or forecast of returns

1. Momentum = Nifty500 Momentum 50 TR Index.

2. Source: MFI Data as of October-2024. Risk free rate taken as Mibor rate at 6.61%.

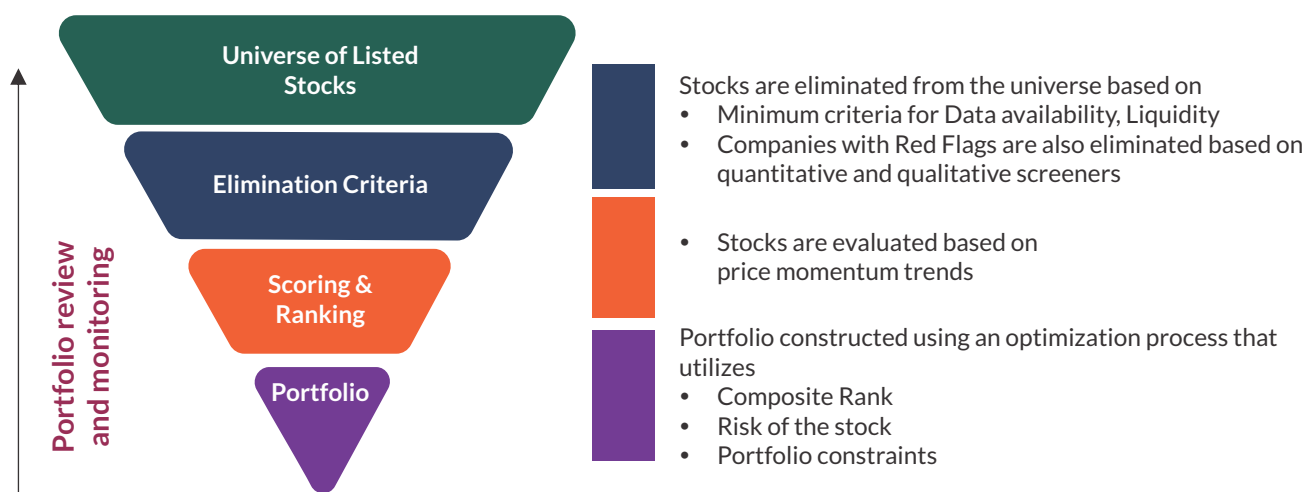
3. Source: MFI, Data from Dec-2006 to October-2024.

Introducing Axis Momentum Fund



The parameters given above are for explaining quantitative model proposed to be used by the Scheme. The fund manager at his discretion may modify parameters to be used in quantitative model. Investors are requested to refer to detailed asset allocation and investment strategy given in Scheme Information Document for complete details.

Portfolio Construction Approach



For detailed asset allocation and investment strategy, please refer Scheme Information Document of the Scheme.

Model performance: Historic record and Rolling return

Period	Model	Nifty 500 TRI	Outperformance
2010	35.43%	20.02%	15.41%
2011	-22.38%	-26.39%	4.01%
2012	34.67%	33.49%	1.18%
2013	-7.12%	4.82%	-11.93%
2014	52.50%	39.30%	13.20%
2015	4.01%	0.23%	3.78%
2016	-5.40%	5.14%	-10.54%
2017	67.23%	37.65%	29.58%
2018	-4.28%	-2.13%	-2.15%
2019	15.65%	8.96%	6.69%
2020	23.46%	17.89%	5.57%
2021	68.96%	31.61%	37.36%
2022	6.81%	4.21%	2.60%
2023	46.69%	26.93%	19.76%
2024	24.61%	17.81%	6.80%
Cumulative Performance	20.06%	13.44%	6.62%



On a 3-year rolling return, the model has delivered **96% times positive return**

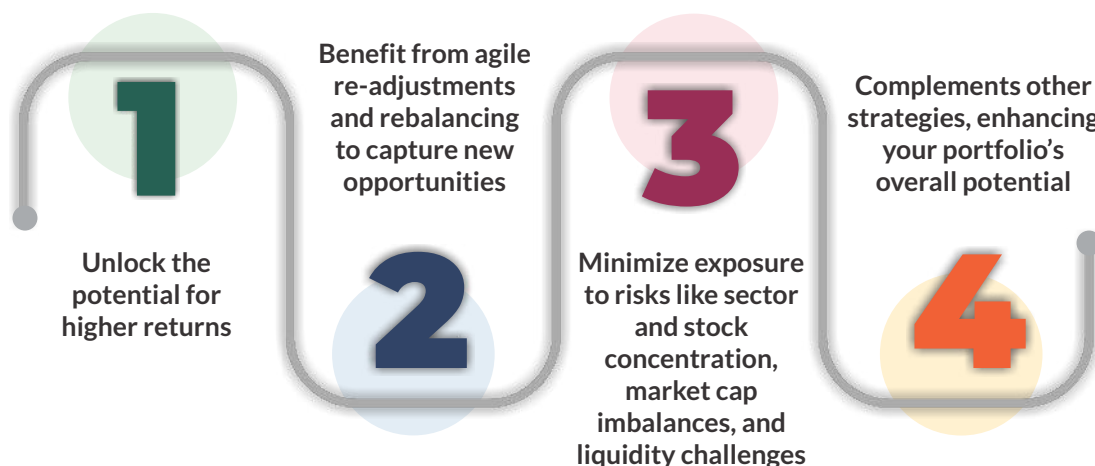


In the past 11 years, the model has **outperformed the benchmark on 76.6% instances**

	Model	Nifty 500 TRI
Min	-2.55%	-3.14%
Max	41.11%	28.96%
Average	19.61%	13.73%
Median	18.15%	14.16%

Source: MFI, Axis AMC Research. Past performance may or may not sustain in future. All information contained on this page is for illustration purpose only to show how momentum model functions. The model performance is derived based on back tested result and does not include expenses incurred by the fund. The back tested result does not in any way indicate the performance of the Scheme. The actual model and the Scheme portfolio shall be constructed based on the provisions in the Scheme Information Document. Data is from Jan 2010 to Oct 2024.

Reasons to invest in Axis Momentum Fund



Ensures the portfolio remains responsive to market changes, potentially leading to better performance and risk management.

Fund Facts

AXIS MOMENTUM FUND

(An open-ended equity scheme following the momentum theme)



NFO Dates:
Nov 22, 2024, to
Dec 06, 2024



Benchmark:
NIFTY 500 TRI



Asset Allocation:

80% to 100%
Equity & Equity related
instruments of companies
selected based on
momentum theme

0% to 20%
Other Equity & Equity
related instruments

0% to 20%
Debt & Money Market
Instruments

0% to 10%
Units issued by REITs
& InvITs



Fund Managers:
Karthik Kumar &
Mayank Hyanki



Minimum Application:

₹100 & in multiples of
₹1 thereafter
(during NFO and on a
continuous basis)



Investment Objective:

- To generate long term capital appreciation for investors from a portfolio of equity and equity related securities selected based on the momentum theme.
- There is no assurance that the investment objective of the scheme will be achieved.

Exit Load:

If redeemed / switched - out within 12 months - For 10% of investment: Nil, For remaining investments: 1%

If redeemed/switched out after 12 months from the date of allotment: Nil . For complete details refer to the SID of the scheme available on our website

Product Labelling:

Axis Momentum Fund

(An open-ended equity scheme following the momentum theme)

Benchmark: NIFTY 500 TRI

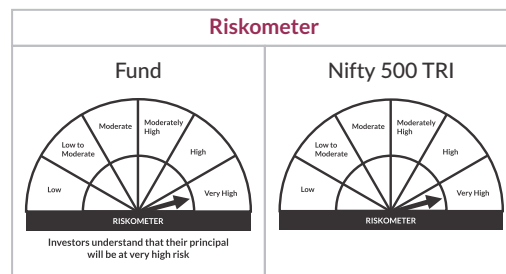
This product is suitable for investors who are seeking*:

- Capital appreciation over long term.
- An equity scheme investing in equity & equity related securities selected based on the momentum theme.

*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.

Riskometer



Statutory Details and Risk Factors

Data updated As on 31st October 2024

Statutory Details: Axis Mutual Fund has been established as a Trust under the Indian Trusts Act, 1882, sponsored by Axis Bank Ltd. (liability restricted to ₹ 1 Lakh). **Trustee:** Axis Mutual Fund Trustee Ltd. **Investment Manager:** Axis Asset Management Co. Ltd. (the AMC). **Risk Factors:** Axis Bank Limited is not liable or responsible for any loss or shortfall resulting from the operation of the scheme. This document represents the views of Axis Asset Management Co. Ltd. and must not be taken as the basis for an investment decision. Neither Axis Mutual Fund, Axis Mutual Fund Trustee Limited nor Axis Asset Management Company Limited, its Directors or associates shall be liable for any damages including lost revenue or lost profits that may arise from the use of the information contained herein. No representation or warranty is made as to the accuracy, completeness or fairness of the information and opinions contained herein. The AMC reserves the right to make modifications and alterations to this statement as may be required from time to time.

Performance Disclaimer and Risk factors

Past performance may or may not be sustained in the future.

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Mutual Fund Investments are subject to market risks, read all scheme related documents carefully.