

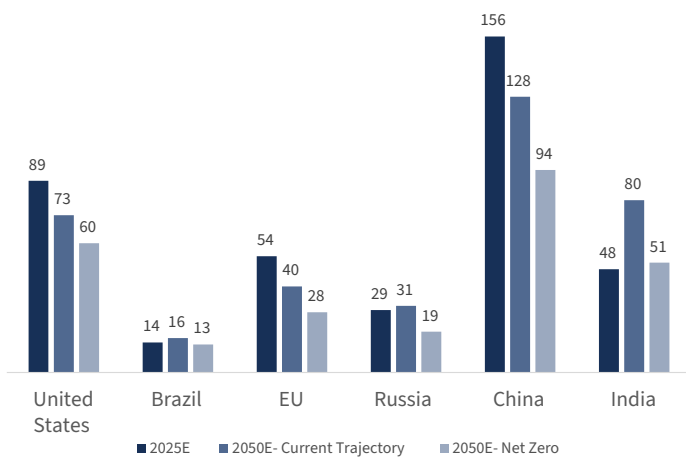
# Kotak Energy Opportunities Fund



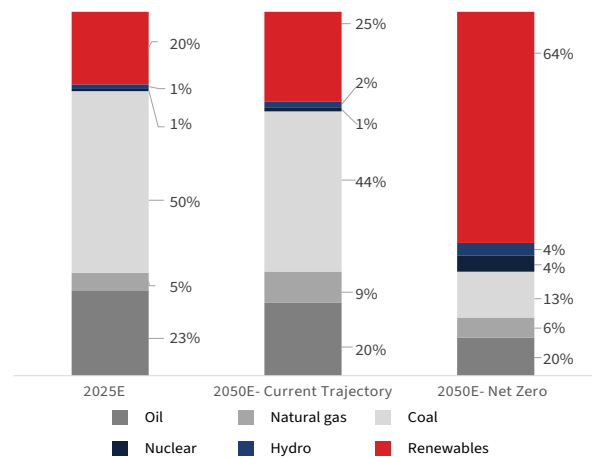
NFO Period: 3<sup>rd</sup> April to 17<sup>th</sup> April 2025

## India is the Fastest Growing Energy Consumer of the World

Primary Energy Consumption (Exajoules)



India's Primary Energy Consumption by Fuel (% Share)



Energy Consumption is measured in Exajoules. 1 Exajoule = 34.1 Mn ton coal equivalent

Source: BP Energy Outlook 2023; Renewables include wind, solar, geothermal, biomass, biomethane and biofuels, as per latest data available

## The Rising Demand with New-Age Industries

Electro – Intensive Industries



Electric Vehicles



Data Center



Metals & Mining



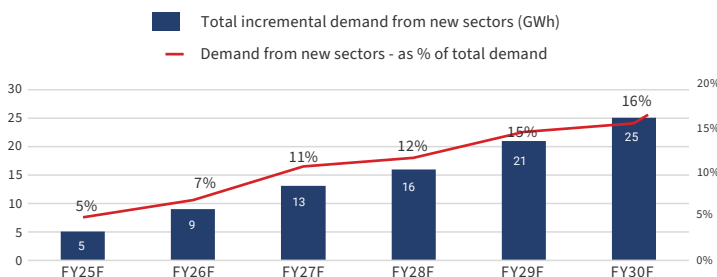
Metro & Railways



Green Hydrogen

## Increase in Electricity Demand by EVs and Data Centers

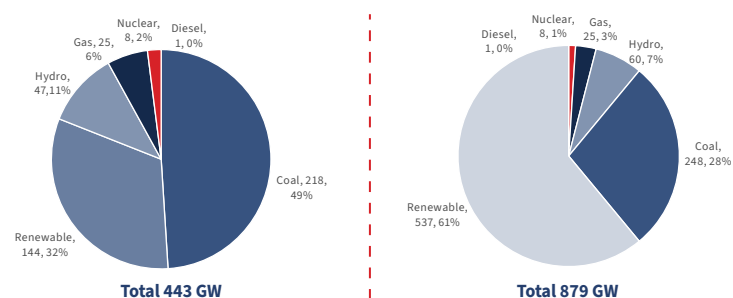
EVs And Data Centers can be 16% of incremental Electricity Demand by 2030



Source: KAMAMC Internal, Nomura Research report dated November 2024 The stock(s)/sector(s) mentioned in this slide do not constitute any recommendation and Kotak Mahindra Mutual Fund may or may not have any future position in these stock(s)/sector(s). Kotak Mahindra Asset Management Company Limited (KAMAMC) is not guaranteeing or promising any returns/futuristic returns.

## Power Generation can have Exponential Increase

90% Of The Growth To Be Driven By Renewables



India's installed power capacity, March fiscal year ends, 2024 (in GW, %)

Expected India's installed power capacity, March fiscal year ends, 2035E (in GW, %)

Source: CEA, Kotak Institutional Equities report dated Jan 2025, As per Latest Data Available

## Why Should You Consider Investing in the Energy Theme?



### Long Term Growth

Participation in Growth Potential of Energy & Associated Industries



### Sustainability

Investment Opportunities in Climate Change and Green Energy Initiatives



### Innovation

Focused on Advancing Technology and Clean Energy Solutions



### Policy Reforms

Capitalises on Unique Market Situations like Policy Reforms

## Nifty Energy Index Returns Showed Growth

Nifty Energy TRI Index Has Elevated Above Nifty 50 TRI and Nifty 500 TRI, In 6 Of Past 10 Years.

Calendar Year	Nifty 50 TRI	Nifty 500 TRI	Nifty Energy TRI
CY2024	10%	16%	6%
CY2023	21%	27%	31%
CY2022	6%	4%	17%
CY2021	26%	32%	38%
CY2020	16%	18%	10%
CY2019	14%	9%	13%
CY2018	5%	-2%	3%
CY2017	30%	38%	42%
CY2016	4%	5%	21%
CY2015	-3%	0%	1%

Source: NSE, Inception date of Nifty Energy TRI: 1st Jul, 2005, same is used for Since Inception calculations. The performance of the index shown does not in any manner indicate the performance of the Scheme. Past performance may or may not be sustained in future. Kotak Mahindra Asset Management Company Limited ("KMAMC") is not guaranteeing or promising, or forecasting any returns.

## Scheme Features

### Name of the Scheme

Kotak Energy Opportunities Fund

### Type of scheme

An open-ended equity scheme following Energy theme.

### Investment Objective

The investment objective of the scheme is to generate long-term capital appreciation from a portfolio that is invested predominantly in equity and equity related securities of companies engaged in transportation & logistics and related activities. However, there is no assurance that the objective of the scheme will be achieved.

### Benchmark Name

Benchmark- NIFTY Energy Index TRI

\*For Detailed Information, Please Refer to the Scheme Information Document (SID)

### Fund Manager(s)

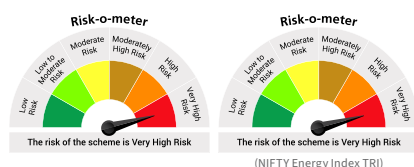
Mr. Harsha Upadhyaya and Mr. Mandar Pawar will be co-managers for Equity and Overseas investment of the Scheme. Mr. Abhishek Bisen will be the Fund Manager for debt investment of the Scheme.

### Exit Load

For redemption / switch out of upto 10% of the initial investment amount (limit) purchased or switched in within 1 year from the date of allotment: Nil. If units redeemed or switched out are in excess of the limit within 1 year from the date of allotment: 1% If units are redeemed or switched out on or after 1 year from the date of allotment: NIL.

### Minimum Application Amount During NFO

Initial Purchase (Non SIP): Rs. 100/- and any amount thereafter  
Additional Purchase (Non SIP): Rs. 100/- and any amount thereafter  
SIP Purchase: Rs. 100/- and any amount thereafter



\*Investors should consult their financial advisor 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 the model portfolio and same may vary post NFO when actual investments are made

### Kotak Energy Opportunities Fund

An open-ended equity scheme following Energy theme.

This product is suitable for investors who are seeking\*:

- Long term capital growth.
- Investment in portfolio of predominantly equity & equity related securities of companies engaged in Energy and Energy related activities.

### Distributed By:

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