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Presenting

## Edelweiss Consumption Fund

(An open-ended equity scheme following consumption theme)



### Consumption Unplugged: A day in India



**~ 4 lakh kgs**

Retail sales of chocolate confectionery



**~ 1.2 cr**

B2C Shipments per day



**~ 59 cr GB**

Daily data usage



**~ 8.41 lakh**

Domestic passengers



**~ 38,500**

Sale of refrigerators



**~ 65,000**

Automobiles sold



**~ 42 lakh**

Daily food deliveries



**~ 50+ Cr**

No. of UPI transactions



# Catalyst Behind India's Consumer Market

## Demographic advantage

India's youthful population, with a **median age of 28**, is powered by **40% Gen Z** and **33% Millennials**, shaping social media and e-commerce trends in experiences, gaming, personalization, and fashion.

## Rising Income

**Rural MPCE rose 2.9x** to ₹4,100 and **urban MPCE 2.7x** to ₹7,000 over the decade, driving a shift from essentials to experiences like dining, entertainment, tourism, and personal care.

## Urbanization

India's **urban population** will grow from 40% in 2024 to **50% by 2040**, adding 30 crore residents. Metro, niche cities, and developed rural areas to drive 50%+ consumption by 2030 (up from 42% in 2020).

## Digitization/ new-age consumption

**70%** of e-commerce transactions are now **digital**; **63%** of online orders in 2024 from **Tier 2 and Tier 3**; **50cr** online shoppers in 2024.

## Easy Credit Availability

India's **retail credit market** at **USD 1.2 trillion** in 2024 witnessed **2X** growth since 2018. Loans and EMIs finance 7 out of 10 iPhones, 60% of two-wheelers, 1 in 3 weddings, and 30-35% of ACs and refrigerators.

## Premiumization

Premiumization is set to drive **2x** growth in alcoholic beverages, **5x** in QSR, and **3x** in apparel, dining out, and travel. Other sectors like capital markets, jewellery, real estate to benefit meaningfully too.\*

**USD 4.3 trillion** consumer spending by 2030 Up from **USD 2.4 trillion** in 2024



## Stock Selection Approach

We will adopt an investment-style agnostic approach, focusing on businesses that are either established quality leaders, high-growth champions, or compelling value opportunities.

### Growth Champions

Mid-cap and small-cap companies with high growth potential due to niche offerings or innovative strategies.

### Quality Leaders

Established brands with strong market share and pricing power.



### Value Picks

Companies with strong fundamentals but temporarily undervalued due to market conditions.



## Portfolio Strategy

The fund will focus on India's diverse consumption landscape, investing across core, emerging, and cyclical themes.



### Core Consumption

Businesses with consistent demand like FMCG, retail, pharma and consumer durables.

**Consistent Compounders**



### Emerging Consumption

Companies riding trends like digital consumption, e-commerce, health & wellness, and premiumization.

**Alpha Opportunities**



### Cyclical Consumption

Companies which are into sectors that are influenced by economic cycles, such as real estate, Auto and Hotels.

**Cyclical Opportunities**



## Scheme Details

Scheme Details	
Minimum Application Amount	Minimum Rs. 100/- and in multiples of Re. 1/- thereafter.
Benchmark	NIFTY India Consumption TRI
Investment Objective	The fund seeks to generate long-term capital appreciation by investing predominantly in equity and equity related securities with a focus on companies engaged in consumption and consumption related sectors or allied sectors. There is no assurance that the investment objective of the Scheme will be achieved.
Fund Managers	Mr. Dhruv Bhatia Mr. Trideep Bhattacharya Mr. Amit Vora (For Overseas Securities)
Exit Load	<ul style="list-style-type: none"> <li>If the units are redeemed /switched out on or before 90 days from the date of allotment – 1% of the applicable NAV.</li> <li>If the units are redeemed /switched out after 90 days from the date of allotment - NIL</li> </ul>
NFO Period	31st January to 14th February 2025



## Asset Allocation

Investments	Indicative Allocation (% of Total Assets)
Equity & Equity related instruments selected on the basis of consumption and consumption related sector or allied sectors (including equity ETFs)	80% to 100%
Other Equity & Equity related instruments	0% to 20%
Debt and money market instruments (including debt ETFs)	0% to 20%
Units issued by REITs and InvITs	0% to 10%

For detailed asset allocation, please refer the SID of the scheme available on the website.

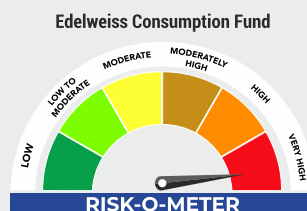
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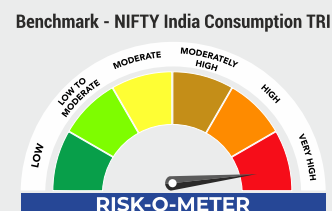
Edelweiss Consumption Fund is suitable for investors who are seeking\*:

- Long term capital appreciation
- Investment in equity and equity related instruments with a focus on companies engaged in consumption and consumption related sectors or allied sectors.

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



The risk of the scheme is Very High



The risk of the benchmark is Very High

MUTUAL FUND INVESTMENTS ARE SUBJECT TO MARKET RISKS, READ ALL SCHEME RELATED DOCUMENTS CAREFULLY.