

## Press Release

### Bajaj Finserv AMC Launches 'Bajaj Finserv Multi Cap Fund' with a Contrarian Investment Strategy

- *An open-ended equity scheme investing across large cap, mid cap, small cap stocks*
- *The New Fund Offer (NFO) opens on February 6, 2025, and closes on February 20, 2025*
- *The scheme will be benchmarked against Nifty 500 Multicap 50:25:25 TRI Index*

**Mumbai/ Pune, 5<sup>th</sup> February 2025:** Bajaj Finserv AMC has announced the launch of Bajaj Finserv Multi Cap Fund, an open-ended equity scheme investing across large cap, mid cap and small cap stocks. The fund opens for subscription on February 6, 2025, and closes on February 20, 2025.

The Bajaj Finserv Multi Cap Fund will use a contrarian strategy, going against popular sentiment to identify untapped and undervalued opportunities. This strategic approach may include buying assets that are out of favour or selling popular ones. Fund managers will follow market trends and sentiments to identify pricing inefficiencies and investment opportunities offered by economic and business cycles, temporary business disruptions, turnaround stories and underappreciated growth drivers.

The fund will maintain a balanced mix of investments across large, mid, and small companies, ensuring a diversified and well-rounded portfolio. With this disciplined investment approach, the multi cap fund will aim to achieve superior long-term returns by identifying opportunities that others might miss.

The fund is suitable for investors who are looking for diversified exposure to large cap, mid cap and small cap segments and a sound investment opportunity in times of volatility. Investors are recommended to hold an investment horizon of 5 years or more to realise the full potential of contrarian opportunities. The scheme is benchmarked against the Nifty 500 Multicap 50:25:25 TRI Index (TRI).

**Speaking on the launch, Ganesh Mohan, Chief Executive Officer, Bajaj Finserv AMC said,** "Bajaj Finserv Multi Cap Fund provides investors with a unique opportunity to unlock hidden value in overlooked assets. It employs a contrarian strategy by investing in companies available at attractive prices and below their intrinsic value, aiming to capture growth across all market segments while allowing opportunities to fully materialize over the course of their business cycles. More than just seeking returns, we are committed to building sustainable wealth with strategic insight and discipline."

The focus of Bajaj Finserv Multi Cap Fund includes investing in sectors and companies poised to benefit from cyclical economic upturns, and offering significant long term return potential. Turnaround stories present opportunities in firms recovering through operational improvements or strategic initiatives, while management transitions can unlock value by driving better governance and performance. Identifying underappreciated growth

opportunities allows investors to uncover hidden drivers not yet fully priced by the market. Business restructuring enhances efficiency and profitability, creating value.

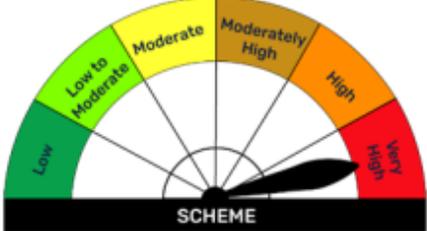
**Nimesh Chandan, Chief Investment Officer, Bajaj Finserv AMC** said, “The Bajaj Finserv Multi Cap Fund will follow a disciplined framework, providing equal opportunities to discover contrarian ideas across all market cap segments. It will invest a minimum of 25% in each large, mid, and small cap companies, thus capitalizing on opportunities across the market cap spectrum. The fund will create a robust and well-balanced portfolio, utilizing the INQUBE investment philosophy, which makes use of superior information collection, behavioural insights, and quantitative analysis.”

The equity portion of the fund will be managed jointly by Mr. Nimesh Chandan & Mr. Sorbh Gupta, while the debt portion will be managed by Mr. Siddharth Chaudhary.

The minimum application amount is ₹500 (Plus multiples of Re.1), with a minimum additional application of ₹100 ((Plus multiples of Re.1). There are no exit loads for up to 10% of the units held. A 1% exit load applies to the remaining 90% if redeemed/switched out within six months from the date of allotment which will be nil if redeemed/ switched out after six months. The fund offers both Growth and IDCW (Income Distribution cum Capital Withdrawal) options.

### Bajaj Finserv Multi Cap Fund

An open ended equity scheme investing across large cap, mid cap, small cap stocks

<p>This product is suitable for investors who are seeking*:</p> <ul style="list-style-type: none"> <li>• wealth creation over long term</li> <li>• to invest predominantly in equity and equity related instruments of large cap, mid cap, small cap companies.</li> </ul> <p>*Investors should consult their financial advisers if in doubt about whether the product is suitable for them</p>	
Riskometer#	
Scheme	Benchmark
 <p>The risk of the scheme is Very High</p>	 <p>The risk of the benchmark i.e. Nifty 500 Multicap 50:25:25 TRI is Very High</p>

#The above 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.**

**About Bajaj Finserv Asset Management Limited**

Bajaj Finserv Asset Management Limited (BFAML) is a 100% subsidiary of Bajaj Finserv Limited. Backed by one of India's most respected brands, BFAML is set to offer an array of innovative investment solutions using a differentiated approach to investing, including but not limited to, mutual funds (equity, debt, hybrid), portfolio management services and alternative investment funds, subject to regulatory approval. With a future-focused investment strategy, it aims to help every Indian achieve life's financial goals.

To know more, visit [www.bajajamc.com](http://www.bajajamc.com)

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