

SAMCO bets on the future of investing in India - launches SAMCO Active Momentum Fund

India's 1st Active Momentum Fund. NFO Opens on June 15, 2023 and closes on June 29, 2023

Launched on the foundation that on a historical basis, the Momentum factor has been one of the strongest generators of excessive returns

MSCI World Momentum Index has generated over 300+% returns in the last 10 years beating all other indices

Mumbai, India – June 7, 2023 - SAMCO Asset Management Private Limited, a distinguished investment management firm, is thrilled to announce the launch of India's first actively managed momentum fund - **SAMCO Active Momentum Fund**. Leveraging the persistent and globally acclaimed momentum anomaly in finance, this pioneering fund aims to deliver exceptional risk-adjusted returns to investors, tapping into the immense potential of momentum investing in the Indian market.

The Nifty 200 Momentum 30 index has achieved an impressive compound annual growth rate (CAGR) of 17.79% over 18 years, outperforming the broader Nifty 50 and Nifty 500 indices. Similarly, the Nifty Midcap 150 Momentum 50 index has achieved an exceptional CAGR of 21.28% since its inception. Moreover, when compared to the MSCI World Index, which produced 10x returns, the MSCI World Momentum Index delivered a commendable 20x return.

(Disclaimer: Past returns are no indication of future returns. The index returns do not indicate returns of any scheme and are only mentioned for illustration of momentum as a factor. Price data for MSCI World Index and MSCI Momentum index from June 1994 till March 2023. For Nifty Indices - Returns mentioned are CAGR returns from 1st April 2005 till 28th April 2023.)

Based on this extensive market research and a proven track record, SAMCO MF launches India's 1st active momentum fund that utilizes these insights offering investors an opportunity to tap into the remarkable growth potential that market momentum can provide.

Extensive historical research conducted by MSCI World Momentum Index substantiates that the Momentum factor has consistently proven itself as one of the most potent generators of alpha. Building upon this powerful investment strategy, SAMCO Active Momentum Fund meticulously selects stocks with momentum characteristics such as breakouts, price leadership, and more, deploying a proprietary momentum-seeking algorithm. By capitalizing on the prevailing price trends, the fund aims to outperform the market and generate superior returns for investors.

Umesh Kumar Mehta, Chief Investment Officer (CIO), SAMCO Asset Management Private Limited, said, "Historically, the momentum factor, or the phenomena based on persistence of stock price trends has been one of the strongest return generators. In Momentum investing, active management offers several unique advantages such as a wider investible universe, quicker rebalancing and hedging flexibility during periods of anti-momentum. By investing in stocks exhibiting momentum characteristics, we aim to offer our investors the potential for superior risk-adjusted returns."

The fund manager for SAMCO Active Momentum Fund is Mr. Paras Matalia, a seasoned investment professional with a deep understanding of momentum-based strategies. With his expertise and experience, Mr. Matalia will oversee the fund's investment decisions and work towards maximizing returns for investors.

Commenting on the launch, Viraj Gandhi, CEO, SAMCO Asset Management Private Limited, said, "We are excited to introduce SAMCO Active Momentum Fund as India's first actively managed Momentum Fund and this represents an exciting step forward for the Indian investment landscape. We believe this fund will open new avenues for investors seeking to benefit from momentum investing. With our dedicated team and a robust investment strategy, we are confident in delivering value to our investors."

The New Fund Offering (NFO) from SAMCO Active Momentum Fund commences on June 15, 2023, and concludes on June 29, 2023. During this period, investors can position their portfolios to benefit from the Momentum factor. An important point for the investors to keep in mind is that the subscriptions will not be accepted after the NFO period until further notice. Furthermore, only those Systematic Investment Plans (SIPs) registered during the NFO period will be accepted, with fresh SIP registrations will temporarily be restricted post NFO until further notice.

There are several advantages that active management offers in momentum investing:

Particulars	Active Management	Passive Management
Exposure management in times of momentum & anti- momentum	Invested only during times of Momentum, hedged when there is Anti-Momentum	Invested 100% of times
Speed & Agility in Rebalancing	As and when needed	Currently lagged at 6-months
Stock Selection basis Relative & Absolute momentum	Uses both Relative & Absolute Momentum	Uses only Relative Momentum
Number of stocks in portfolio	Not fixed, based on capital and position sizing	Capped at 50 currently
Universe for Identification of opportunities	Nifty 750 stocks	Limited universe only

SAMCO Asset Management Private Limited takes immense pride in introducing this time-tested investment strategy for the first time to Indian investors, offering them the opportunity to unlock the potential of momentum investing.

For more information about SAMCO Active Momentum Fund and the NFO, please visit our website at <https://www.samcomf.com/active-momentum-fund>.

About Samco Asset Management Pvt Ltd

Samco Asset Management Pvt Ltd (<https://www.samcomf.com>) is the asset manager to the Samco Mutual Fund having SEBI registration No MF-077/21/03 having its registered office at 1003-A, 10th Floor, Naman Midtown, Senapati Bapat Marg, Prabhadevi(W), Mumbai 400013. Samco Mutual Fund has around 80000+ investors spread across 4000 cities and towns in India. With a customer-centric approach and a team of seasoned professionals, SAMCO Asset Management aims to deliver consistent, long-term value to its clients.

Details about the Sponsor, SAMCO Securities Limited, <https://www.samco.in/> is a wealth-tech start-up headquartered in Mumbai, which is one of India's fastest-growing companies in the Discount Broking Industry. The company aims to solve problems at an extremely affordable cost for its customers who actively trade or invest in the Indian capital markets using algorithms, data science, and artificial intelligence.

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

	Scheme Risk-o-meter	Benchmark Risk-o-meter
<p>This product is suitable for investors who are seeking* :</p> <ul style="list-style-type: none"> • Long Term Capital Appreciation; • An actively managed thematic equity scheme that invests in stocks exhibiting momentum characteristics <p>*Investors should consult their financial advisers if in doubt about whether the product is suitable for them.</p> <p>(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)</p>	<p>Investors understand that their principal will be at very high risk</p>	<p>Investors understand that their principal will be at very high risk</p>
	Offer of units face value of ₹ 10/- each for cash during the New Fund Offer and Continuous offer for units at NAV based Prices	

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