

Media Release

## Kotak Mutual Fund launches Kotak Focused Equity Fund

*This open ended scheme will invest in a concentrated portfolio of up to 30 stocks in large-cap, mid-cap and small-cap category*

**Mumbai, 25<sup>th</sup> June, 2019:** Kotak Asset Management Company (Kotak Mutual Fund) today announced the launch of Kotak Focused Equity Fund. The New Fund Offering (NFO) opens for subscription on 25<sup>th</sup> June, 2019 and closes on 09<sup>th</sup> July, 2019. This open-ended scheme will invest in a focused portfolio of up to 30 stocks across large-cap, mid-cap and small-cap categories.

The fund, which will follow Nifty 200TRI benchmark, aims to generate long term capital appreciation by investing in equity & equity related instruments across market capitalization. Kotak Focused Equity Fund will be managed by Shibani Kurian and Harish Krishnan.

Shibani Kurian, Senior Vice President and Head of Equity Research said, “Kotak Focused Equity Fund integrates corporate governance with risk/reward-based selections. The fund will follow a thematic approach of bottom up stock picking using the Business, Management and Valuation (BMV) model. We will evaluate the business environment that a company operates in, the capability of the management to execute and scale up the business and valuation of the company based on fundamentals like discounted cash flows and P/E ratios.”

### Features of Kotak Focused Equity Fund:

- **Concentrated Portfolio** consisting of 25-30 high growth and good quality businesses with sustainable and scalable earnings potential over the long term
- **Leveraging On Research Capabilities** by stock picking through the BMV model
- **Suitable For Long Term Investors** looking to benefit from the structural growth opportunity in Indian equities
- **Multi-Cap Portfolio Strategy** to ensure stocks pick without market cap bias
- **Bottom Up Approach To Stock Picking** with a top down thematic overlay



### About Kotak Mahindra Asset Management

Kotak Mahindra Asset Management Company Limited (KMAMC), a wholly owned subsidiary of Kotak Mahindra Bank Limited (Kotak), is the Asset Manager for Kotak Mutual Fund (KMF). KMAMC started operations in December 1998 and has approximately 22 lakh investors in various schemes. KMF offers schemes catering to investors with varying risk - return profiles and was the first fund house in the country to launch a dedicated gilt scheme investing only in government securities. The company is present in 82 cities and has 85 branches.

### For more information, please contact:

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