

Global algorithm adapted for Indian Investors

Presenting to you for the first time ever **"FI Stable Growth 25"** based on **MSCI** risk-weighted methodology, a breakthrough algorithm, which has been a huge success globally, skillfully crafted by FundsIndia to adapt to unique Indian investors like you.



Highlights of the model

1. Better Returns

- It has delivered **more than 12%*** returns on **99% of occasions** on a **5-year rolling basis**
- It has **outperformed NIFTY 50 TRI** by **more than 4%*, 97% of the time**, if held for **5 years**, while having the risk-factor in check
- It has **outperformed NIFTY 50 TRI** by **6%*** in the last **10 years** (16.2% for the model vs 10.2% for Nifty 50 TRI)

Performance

Scheme	10 Years
FI Stable Growth 25	16%
Nifty 50 TRI	10%
Nifty 500 TRI	10%

Outperformance

Scheme	10 Years
Nifty 50 TRI	6%
Nifty 500 TRI	6%

Consistency in Performance

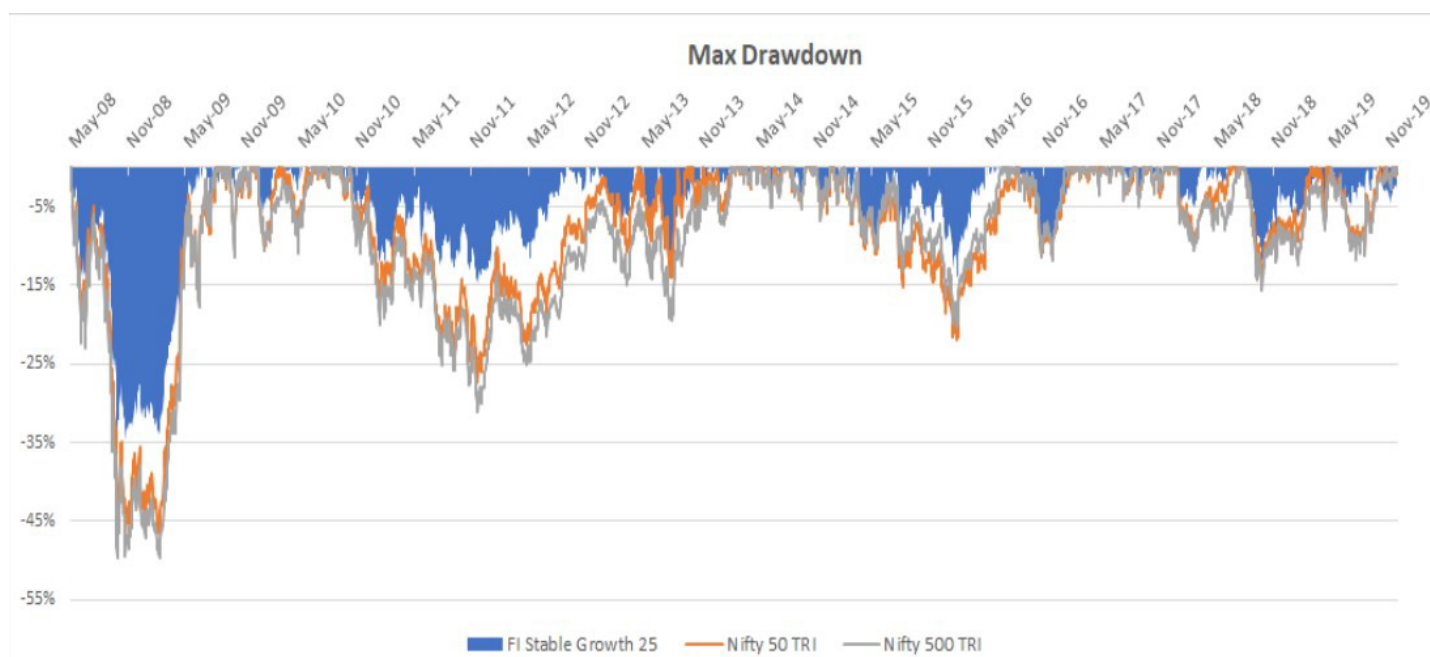
5 Year RR	FI Stable Growth 25	Nifty 50 TRI	Nifty 500 TRI
Average	19%	12%	13%
Max	28%	22%	22%
Min	12%	5%	4%
% of times <0%	0%	0%	0%
% of times >8%	100%	86%	89%
% of times >12%	99%	57%	59%
% of times >15%	84%	14%	34%

Consistent Outperformance

If you held the portfolio for **5 years**, **97% of the occasions**, the model has **outperformed Nifty 50** by **more than 4%** and **99% of the occasions**, the model has **outperformed Nifty 500** by **more than 3%**.

2. Lower risk

- Whenever there was a downfall in the market, MSCI model has withstood it much better (lower declines) than NIFTY 50 TRI



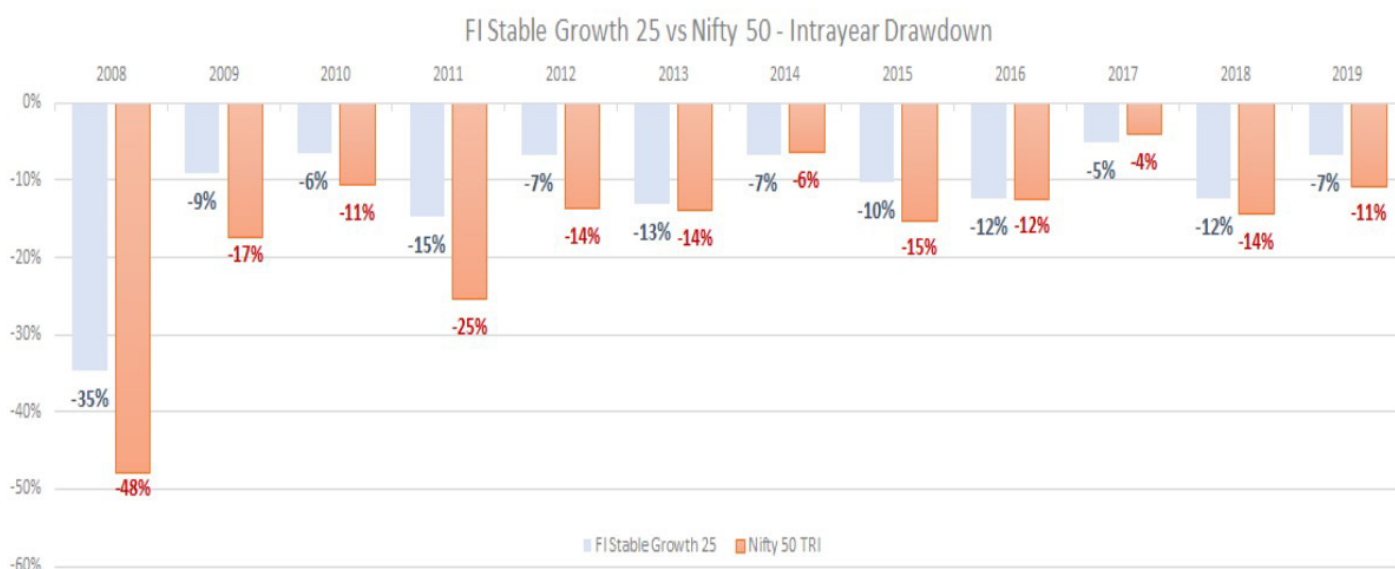
Lower Declines

Event	FI Stable Growth 25	Nifty 50 TRI	Nifty 500 TRI
2008 Sub Prime Crisis	-36%	-48%	-50%
2011 Euro Crisis	-16%	-27%	-31%
2013 Taper	-14%	-14%	-20%
2016 China Crisis	-15%	-22%	-20%

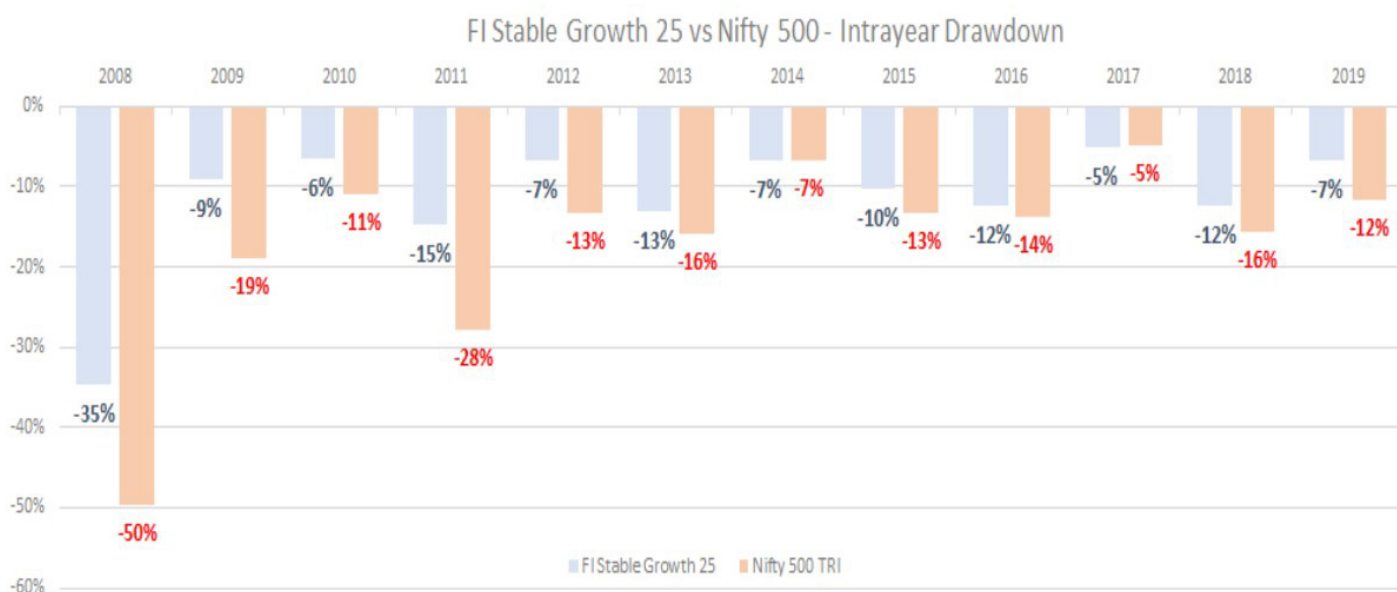
% Recovery Required to get back to positive

Event	FI Stable Growth 25	Nifty 50 TRI	Nifty 500 TRI	Outperformance vs Nifty
2008 Sub Prime Crisis	56%	92%	99%	36%
2011 Euro Crisis	19%	37%	45%	18%
2013 Taper	16%	16%	24%	0%
2016 China Crisis	18%	28%	25%	10%

Intra Year Declines FI Stable Growth 25 vs NIFTY 50 TRI



Intra Year Declines FI Stable Growth 25 vs NIFTY 500 TRI



Calendar Year Performance

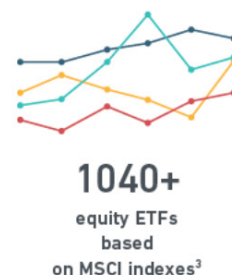
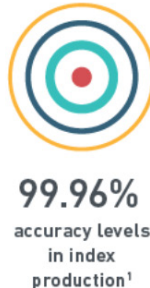
Yearwise Returns	FI Stable Growth 25	Nifty 50	Nifty 500
2008 (May 30 to Dec 31)	-29%	-39%	-41%
2009	85%	78%	91%
2010	30%	19%	15%
2011	-12%	-24%	-26%
2012	20%	29%	33%
2013	8%	8%	5%
2014	51%	33%	39%
2015	12%	-3%	0%
2016	8%	4%	5%
2017	39%	30%	38%
2018	10%	5%	-2%
2019	8%	13%	9%

3. Global expertise

- MSCI is a leading worldwide provider of investment decision support tools, with over USD 11 trillion tracking its 200,000 equity Indexes

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What does the model do?

- Maximum stock weightage is capped at 10%
- It has a focused exposure to 25 **low volatile** stocks
- It reweights all the constituents of a market-cap-weighted MSCI parent index so that stocks with lower historical return variance are given higher index weights
- Well-known for its automated design and rule-based working
- Bias-Free, automated portfolio rebalancing based on smart and time-tested algorithms

So, how do we know this model is for you?

- A minimum of 5 lakhs is required for optimal participation in this model
- Investors will have the option to liquidate their investments at any point

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