

Newsletter for Investor – May'2023

1. Index Movements:

Indices	31 st May'23	30 th April'23	% Change	International	31 st May'23	30 th April'23	% Change
S&P BSE Sensex	62622.24	61112.44	2.47%	Dow Jones	32910.90	34098.95	-3.48%
S&P BSE Midcap	27100.05	25492.43	6.31%	Nasdaq	12935.29	12226.58	5.80%
S&P BSE Small cap	30524.82	28917.07	5.56%	Dax Index	15664.02	15922.38	-1.62%
Nifty 50	18534.40	18065.00	2.60%	Shanghai Composite	3204.56	3323.27	-3.57%
Nifty 500	15766.40	15219.55	3.59%	Hang Seng	18234.27	19894.57	-8.35%
India VIX	11.97	10.95	9.32%	Nikkei	30887.88	28856.44	7.04%

2. Commodity Movements:

Commodity	31 st May'23	30 th April'23	% Change
Gold (10gm)	60900	60930	-0.05%
Silver (1kg)	76800	76200	0.79%
Crude Oil (Rs/barrel)	5690	6286	-9.48%

3. Flows for the month of May'23:

Category	Net Equity	Net Debt
FII SEBI	38765.42 Cr	2806.60 Cr
MF SEBI	2446.51 Cr	-4806.16 Cr

4. RBI Update on Monetary Policy

	31 st May'23	30 th April'23
G- Sec 10Y	6.989%	7.116%

5. For Opening 3-in-1 Demat Account in ICICI Direct you can get in touch with –

Name of Concerned Person	Location	Contact No.	Email ID
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6. Upcoming NFO in the month of June'23

Scheme Name	Open Date	Close Date
UTI Nifty50 Equal Weight Index Fund	22.05.2023	05.06.2023
Kotak Nifty 200 Momentum 30 Index Fund	25.05.2023	08.06.2023
ITI Focused Equity Fund	29.05.2023	12.06.2023
Mirae Asset Silver ETF	29.05.2023	06.06.2023
Quant BFSI Fund	01.06.2023	14.06.2023
Edelweiss Multi Asset Allocation Fund NFO	05.06.2023	19.06.2023
Samco Active Momentum Fund	15.06.2023	29.06.2023

7. Key Features - Edelweiss Multi Asset Allocation Fund – NFO (5th June – 19th June)

- ☞ Multi Asset Category as a DEBT ALTERNATIVE
- ☞ No open Equity/Commodity RISK
- ☞ Predominantly Fixed Income with exposure to Equities and Gold & Silver through arbitrage.
- ☞ 100% hedged Equity and Gold & Silver exposure through arbitrage.
- ☞ Offers a **LTCG Tax benefit (20% after Indexation)** compared to traditional fixed income products.
- ☞ Strategically positioned between Equity Arbitrage fund & Equity Savings fund on risk- return matrix.
- ☞ Ideal for 3 years and above investment horizon.

Portfolio Construction

- ✓ Fixed Income - 45 - 55%
- ✓ Equity Arbitrage - 35-40%
- ✓ Gold & Silver Arbitrage - 10-15%

8. Key Features - Samco Active Momentum Fund – NFO (15th June – 29th June)

- ☞ Momentum is one of the most persistent factor to generate excess returns in all assets be it equity, commodity and forex and over 215+ years of history.
- ☞ Historically the two momentum indices from NSE (India) also beat the broader markets as well as their base indices by a huge margin. - Nifty 200 Momentum 30 and Midcap150 Momentum 50
- ☞ To invest in stocks that are showing momentum characteristics, Hold till the trend is your friend.
- ☞ To sell the stocks that are losing momentum, Let winners run.
- ☞ Investible **Universe - 750** Stocks from Large, Mid, Small & Micro Cap
- ☞ Ideal for "**DO IT YOURSELF**" **Equity Trading Investors - High Risk and High Reward Ratio**

9. SAHYOG SIP - Unique for Starting Investments for Your Domestic Help, Office Assistants and Driver

The process is an offline process requiring:

- KYC of Individual employer and their personal employee
- Account Opening form duly signed by personal employee
- SIP Registration Form duly signed by personal employee
- One Time Mandate Form duly signed by Individual employer
- Third Party Payment Declaration Form signed by both
- Declaration Pursuant to Third Party Form signed by both

Document Type	Employer	Employee
CKYC & KRA KYC Form (If Employer is already KYC compliant, only Employee KYC would be required)		
CKYC Proof - Color Photo - PAN - Proof Of Address & Identity - In Person Verification & KYC Document Verification (Refer to all requirements mentioned in the CKYC Form)		
Common Application Form (Account Opening Form)	✗	
SIP Registration Form	✗	
SIP OTM Mandate form signed by employer		✗
Third Party Payment Declaration Form (Both Employer & employee to sign on the same form)		
Undertaking - Declarations by the Third Party/Employer (Both Employer & employee to sign on the same form)		

Suitable Schemes for Sahyog SIP:

Scheme Name	AUM	Date of Launch	1yr	3yr	SI
ABSL Small Cap Fund	3331	31.05.2007	17.11	35.44	11.44
ABSL Frontline Equity Fund	22440	30.08.2002	12.92	24.36	18.86
ABSL Multicap Fund	3887	07.05.2021	12.64	NA	13.57

10. Note from Founder's Desk –

There has been good run of the equity indices for the month of April and May 2023, however we expect some turbulence opportunity to add further stakes in Equities. **"Great Stock bought at bad price will always give profits whereas bad stock bought at great price may hurt badly"**. Current Valuations seems fairly priced and does give a comfort to steadily add allocations in the Midcap and Small cap space.

Thought of the Month:

It's always better to give time to the Investments rather to time the market!

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