



INTRODUCING

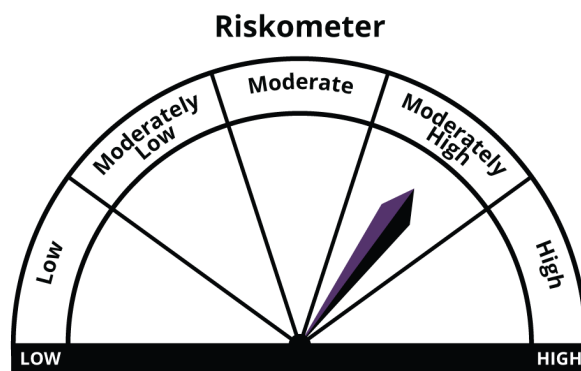
# SHRIRAM LONG TERM EQUITY FUND

(An open ended equity linked saving scheme with a statutory lock in of 3 years and tax benefit)

This product is suitable for investors who are seeking\*:

- Long term capital appreciation with a 3 years lock in and tax benefit
- Investment in diversified portfolio of predominantly Equity and Equity-related Securities
- Moderately High Risk

\*Investors should consult their financial advisers if in doubt about whether the product is suitable for them.



Investors understand that their principal will be at moderately high risk.

**NFO OPENS:**  
**DECEMBER 17, 2018**

**NFO CLOSES:**  
**JANUARY 18, 2019**

Mutual Fund Investments are subject to market risks, read all scheme related documents carefully.

# WHAT IS ELSS?

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ELSS, or Equity Linked Savings Scheme, is a type of open-ended mutual fund offering that provides investors the opportunity of wealth creation by investing into equity while also including tax saving benefits.



**Dual Benefits: Investment Growth through Equity as well as Tax Saving**



**Compulsory 3 Year Lock-in Period: Lower Risk**



**Fund Manager Flexibility: Performance Stability**



**Long-term Outlook**



**Diversified Portfolio**

# WHY ELSS?

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## Ideal For Long-Term Goals

Long-term wealth creation plan



**Children's Education**



**Future Goals**



**Retirement Plans**

## Active Management

Active management ensures that returns remain promising despite market conditions.  
It helps to



**Exploit Trends and Opportunities**

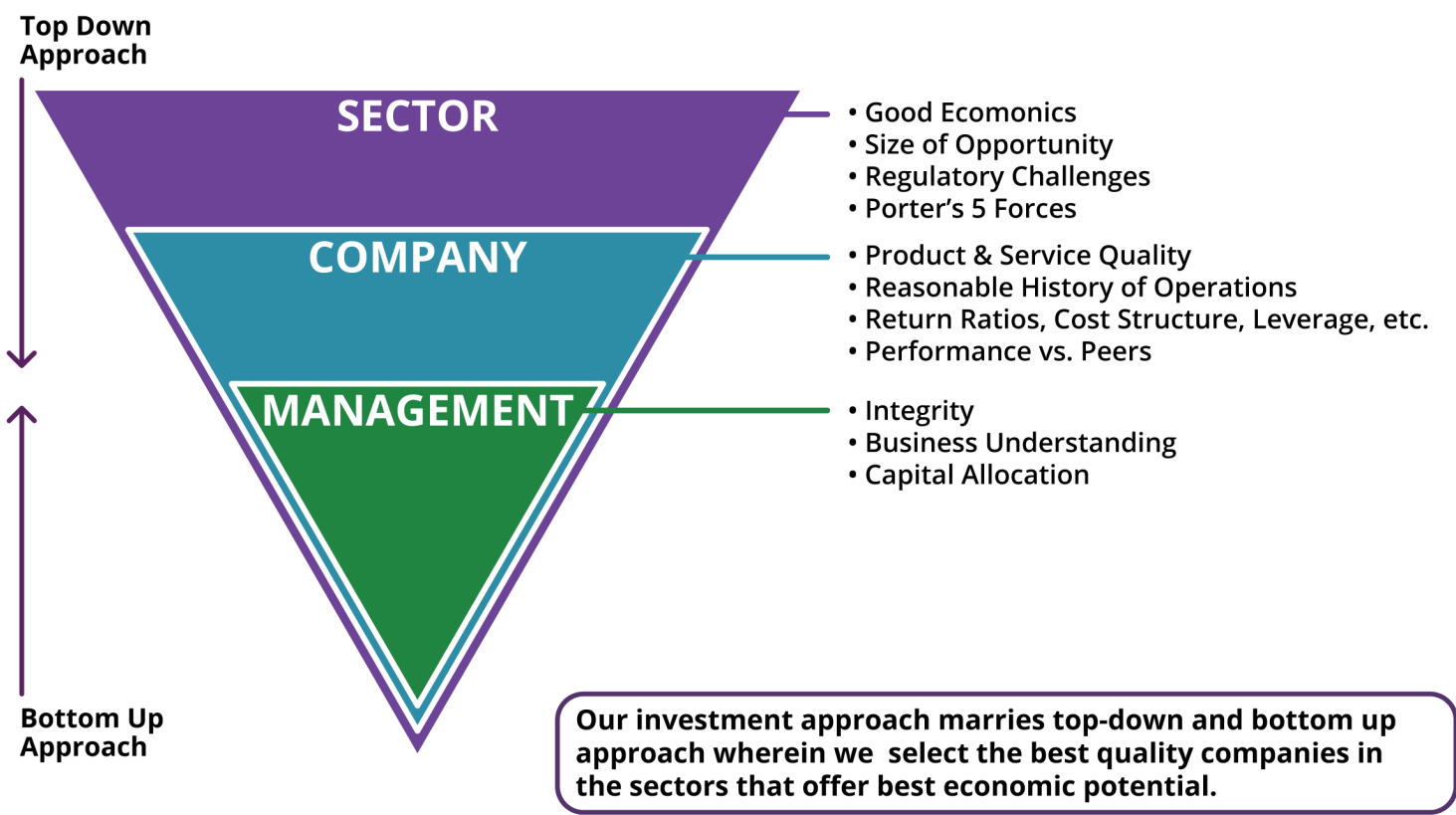


**Manage Volatility**

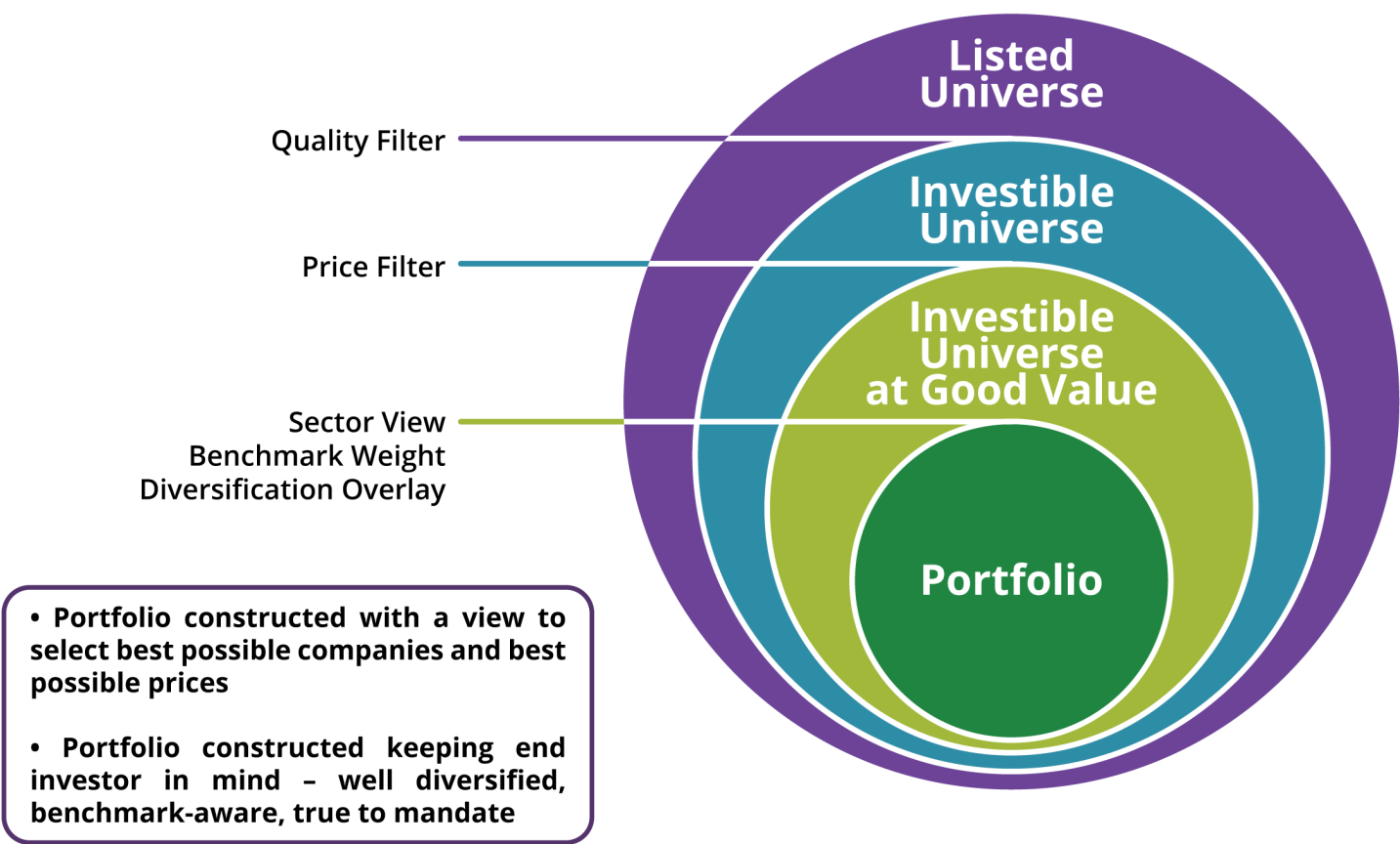


**Diversify Portfolio**

# OUR INVESTMENT APPROACH



# PORTFOLIO CONSTRUCTION



# FUND FACTS

<b>Scheme Name</b>	Shriram Long Term Equity Fund
<b>NFO Dates</b>	17th December, 2018 to 18th January, 2019
<b>Investment Objective</b>	The primary investment objective of the Scheme is to generate income and long-term capital appreciation from a diversified portfolio of predominantly equity and equity related securities and enable investors to avail the income tax rebate, as permitted from time to time. However, there is no assurance or guarantee that the investment objective of the Scheme will be achieved. The Scheme does not assure or guarantee any returns.
<b>Type of Scheme</b>	An open ended equity linked saving scheme with a statutory lock in of 3 years and tax benefit
<b>Fund Manager</b>	Mr. Kartik Soral
<b>Benchmark</b>	Nifty 500
<b>Min. Investment Amount</b>	Rs. 500/- and in multiples of Rs 500/- thereafter
<b>Load Structure</b>	Entry Load: N/A Exit Load: Nil
<b>Plans &amp; Options</b>	Regular & Direct Plans with Growth & Dividend Options

## THE INVESTMENT TEAM

### • Mr. Kartik Soral , CFA - Senior Fund Manager

Mr. Kartik Soral serves as the Senior Fund Manager of Shriram Mutual Fund having an experience of more than 9 years in his professional career.

Mr. Soral is a PGDM from IIM Ahmedabad and B.Tech in Chemical Engineering from IIT-BHU, Varanasi

Mr. Kartik had held the position of Fund Manager at Edelweiss Asset Management Co. Ltd. Before joining Edelweiss Asset Management Co. Ltd., he was associated with Corporate Finance team at Larsen & Toubro Ltd. and the Equity Derivatives team at the Deutsche Bank group.

### • Ms. Gargi Bhattacharyya Banerjee - Fund Manager

Ms. Gargi Bhattacharyya Banerjee serves as the Fund Manager of Shriram Hybrid Equity Fund having an experience of over 17 years into her professional career.

Ms. Gargi Bhattacharyya Banerjee received her Master of Business Management with specialization in Finance and Bachelor of Science with Economics (H) from University of Calcutta.

She joined as Research Manager in Shriram Asset Management Company Limited in November 2012. Prior to joining Shriram Asset Management Company Limited, she has held the key position in the Research team with Zacks Research Private Limited and Shriram Insight Share Brokers Limited.



*Distributed by:*