

KEEP YOUR EYES ON THE STARS

INVEST IN UTI FOCUSED EQUITY FUND



Contact your mutual fund distributor
or give a missed call on **8655019940**.

NFO Opens On
4th August, 2021

NFO Closes On
18th August, 2021

UTI FOCUSED EQUITY FUND

UTI Focused Equity Fund is an open ended equity scheme investing in maximum 30 stocks across market caps.

UTI Focused Equity Fund

The product is suitable for investors who are seeking*:

- Long term capital growth
- Investment in equity and equity related securities across market capitalisation in maximum 30 stocks

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

Product labelling assigned during the NFO is based on the scheme characteristics and the same may vary post NFO when the actual investments are made and will be reviewed on ongoing basis.



Investors understand that their principal will be at Very High Risk.

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

UTI FOCUSED EQUITY FUND

Focused investing is about high-conviction and has two dimensions. The first is to hand-pick a select set of companies from the larger universe by relying on our investment process and rich investment experience to separate the wheat from the chaff. Second is to build the portfolio to demonstrate the conviction by building significant portfolio positions in each company, which can accentuate the portfolio outcome.

UTI Focused Equity Fund endeavours to build a concentrated portfolio of upto 30 select high-conviction ideas. The core of the portfolio is built around companies with steady cash flows and growth potential. The fund is optimally diversified across sectors and market capitalization.

Consider investing in UTI Focused Equity Fund to help gain an edge from our rich investment experience & investment process and accelerate your wealth creation journey.

WHY INVEST IN UTI FOCUSED EQUITY FUND?

The fund focuses on high quality businesses determined by their high RoCEs with long-term sustainable growth. It also focuses on companies where there is a visibility of business transformation and businesses that might undergo cyclical headwinds. The portfolio has the potential to earn relatively better returns than the broader markets, led by high-conviction and concentrated approach backed by research expertise and risk assessment framework.



Concentrated Portfolio

Exposure to hand-picked high-conviction ideas



Leverage of Research Expertise

Experienced fund management team tracking large-set of companies



Optimal Portfolio Diversification

Maximum of 30 stocks across sectors and market capitalization



Uniquely Positioned

Distinct portfolio relative to broader market indices with potential for alpha creation

FUND SNAPSHOT



Scheme Objective

The investment objective of the scheme is to generate long term capital appreciation by investing in equity and equity related instruments of maximum 30 stocks across the market caps. However, there can be no assurance or guarantee that the investment objective of the scheme would be achieved.



Fund Manager

Mr. Sudhanshu Asthana



Minimum Application Amount (₹)

₹5,000/- and in multiples of ₹1/- thereafter with no upper limit



Type of Scheme

An open ended equity scheme investing in maximum 30 stocks across market caps



Load Structure

Entry Load: Nil
Exit Load: Less than one year – 1%;
Greater than or equal to one year – Nil



Benchmark

Nifty 500 TRI

WHO SHOULD INVEST IN UTI FOCUSED EQUITY FUND?

Investors looking for a high-conviction and concentrated portfolio backed by research expertise and risk assessment framework

Investors who have a long-term goal of wealth creation and aiming to balance an overall conservative portfolio construct with high-risk strategy