

# Abans Smart Beta Portfolio

## (An Algorithm Powered PMS Strategy)

As on 30<sup>th</sup> November, 2025

The objective of the strategy is to build concentrated portfolio of 10 stocks from midcap universe with quarterly rebalancing. This could be a high risk – high return strategy due to its concentrated portfolio.

### FUND SNAPSHOT

Fund Manager : Quant Driven Strategy

Inception Date : 29/04/2019

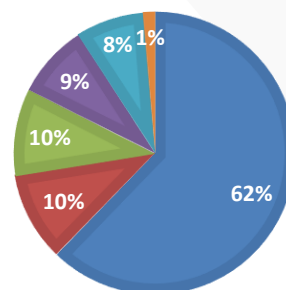
Strategy : Midcap

Benchmark : BSE 500 TRI

Minimum Investment : INR 50 Lakhs

### SECTOR ALLOCATION

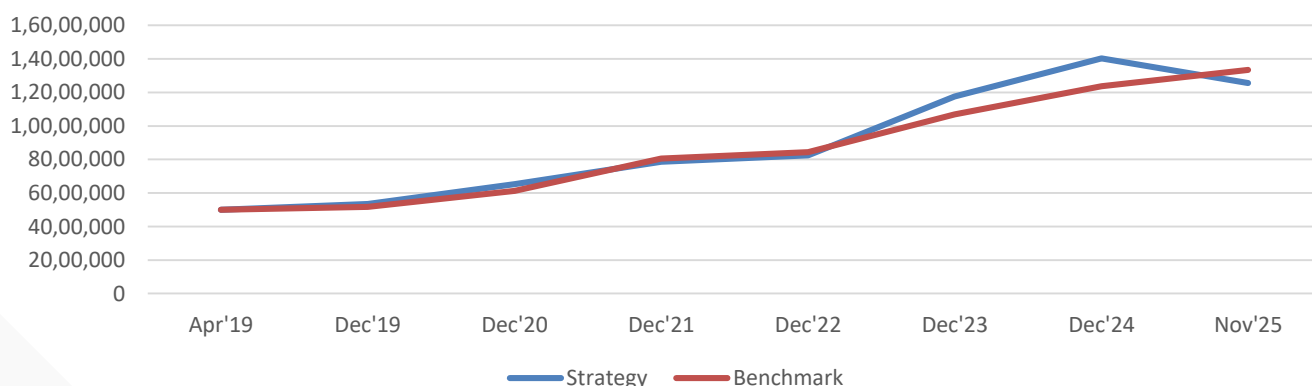
FINANCIAL SERVICES IT  
FERTILISERS & PESTICIDES PHARMA  
TEXTILES Cash & Equivalents



Performance	1 Month	3 Months	6 Months	1 Year	2 Years	3 Years	5 Years	Since Inception
Smart Beta	7.29%	14.33%	15.52%	-8.63%	5.47%	14.03%	15.10%	14.98%
BSE 500 TRI	0.96%	6.57%	5.62%	6.27%	16.21%	15.28%	18.63%	16.01%
Alpha/Outperformance	6.33%	7.76%	9.89%	-14.91%	-10.73%	-1.25%	-3.52%	-1.02%

\*Performance Computation is on TWRR basis, Post Fees & Expenses. More than 1 year returns are CAGR.

### Growth of INR 50 Lakhs Since Inception



- INR 50 Lakhs invested in Apr'2019 has grown to INR 1.26 Crs vs 1.33 Crs for benchmark (BSE 500 TRI)
- Absolute Return of ~151% (CAGR - 15%)

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