



Meta Investment

Certified Financial Planners | Pune, India

Financial One-Pager | Prepared for Client Review | one-pager

Arudha SIF One-Pager

Bandhan Mutual Fund's Hedge-Style Strategies for HNIs

Strategy Overview

Aspect	Arudha Hybrid Long-Short	Arudha Equity Long-Short
Type	Interval (Daily buy, Mon/Thu redeem)	Open-Ended (Daily liquidity)
Objective	Short-medium optimal returns	Long-term capital appreciation
Core Allocation	35-65% Equity + 35-65% Debt	80-100% Equity
Short Exposure	Equity + Debt (max 25%)	Equity only (max 25%)
Benchmark	CRISIL Hybrid 85:15 Conservative	NIFTY 500 TRI
Risk Band	Level 3 (Moderate)	Level 5 (High)
NFO Price	₹10/unit	₹10/unit

Investment Details

MINIMUM INVESTMENT: ₹10 Lakh (PAN-level across Arudha SIFs)

✓ Accredited Investors: ₹1 Lakh only

✓ SIP/SWP/STP: ₹10K (min 6 instalments)

EXIT LOAD:

- Hybrid: NIL
- Equity: 0.50% (<30 days)

PLANS: Direct + Regular | Growth + Flexible IDCW (Daily/Weekly/Monthly)

Key Features

- **Derivatives Power:** Covered calls, protective puts, spreads, straddles (upto 100% gross exposure)
- **Global Access:** Up to 50% overseas (US\$25M limit post-NFO)
- **REITs/InvITs:** Up to 20% allocation
- **Stock Lending:** Up to 20% (5% single party)
- **Listing:** Hybrid on BSE/NSE | Equity unlisted (open-ended)

SIP Flexibility: Weekly (Wed default), Monthly, Quarterly + Top-up/Pause/Booster options

Managers & Process

Hybrid: Brijesh Shah (Debt) + Team Overlay

Equity: Nilesh Saha (Equity) + Brijesh Shah (Overlay)

- ✓ Bottom-up stock selection
 - ✓ Active derivative overlay
 - ✓ Risk-managed shorts
 - ✓ Daily NAV (11 PM) | Bi-monthly portfolios
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Risks & Taxation

RISK LEVEL: Moderate to Very High

Key Risks: Derivatives, Market Volatility, Liquidity, Credit Events

TAX (Equity-Oriented):

- LTCG (>₹1.25L): 12.5%
 - STCG: 20% slab rate
 - Stamp Duty: 0.005%
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Who Should Invest?

- ✓ **HNIs** (₹10L+ corpus)
- ✓ **Accredited Investors** (₹2Cr income/₹7.5Cr net worth)
- ✓ **Portfolio Diversifiers** seeking hedge-fund alpha
- ✓ **Market-savvy** investors comfortable with derivatives

NOT FOR: Conservative investors / <₹10L corpus

Meta Investment | Your Arudha SIF Specialists

Schedule *FREE* Portfolio Fit Assessment → [WhatsApp/Call](#)

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Disclaimer: Investments are subject to market risks. Past performance does not guarantee future results. Please read scheme documents carefully. AMFI Registration No: ARN-129322.