



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

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%



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.