



Quantum
MUTUAL FUND
FOR THOUGHTFUL INVESTORS

Distributor HANDBOOK

Invest. Expand. Thrive.
Grow with us!



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About Quantum Mutual Fund

Quantum Mutual Fund was established in 2006 with the launch of its first fund. Quantum walks a different path with focus on ethics, integrity & transparency in managing assets. With a steadfast vision and unwavering commitment, we assist you to help your client's financial aspirations propel into the quantum realm of success. A meticulous research & investment approach helps your clients easily navigate market swings.



Predictability

Rely on a fund house that has a proven track record of delivering predictable outcomes based on its estimated upside potential.



Investor First

Dedicated to prioritizing investor needs & goals with commitment to put the client first.



Robust Investment Process

A robust & research-driven approach that follows a well-defined process to provide the best investment solutions.



Risk Adjusted

Consistently delivered risk adjusted returns over the long term.

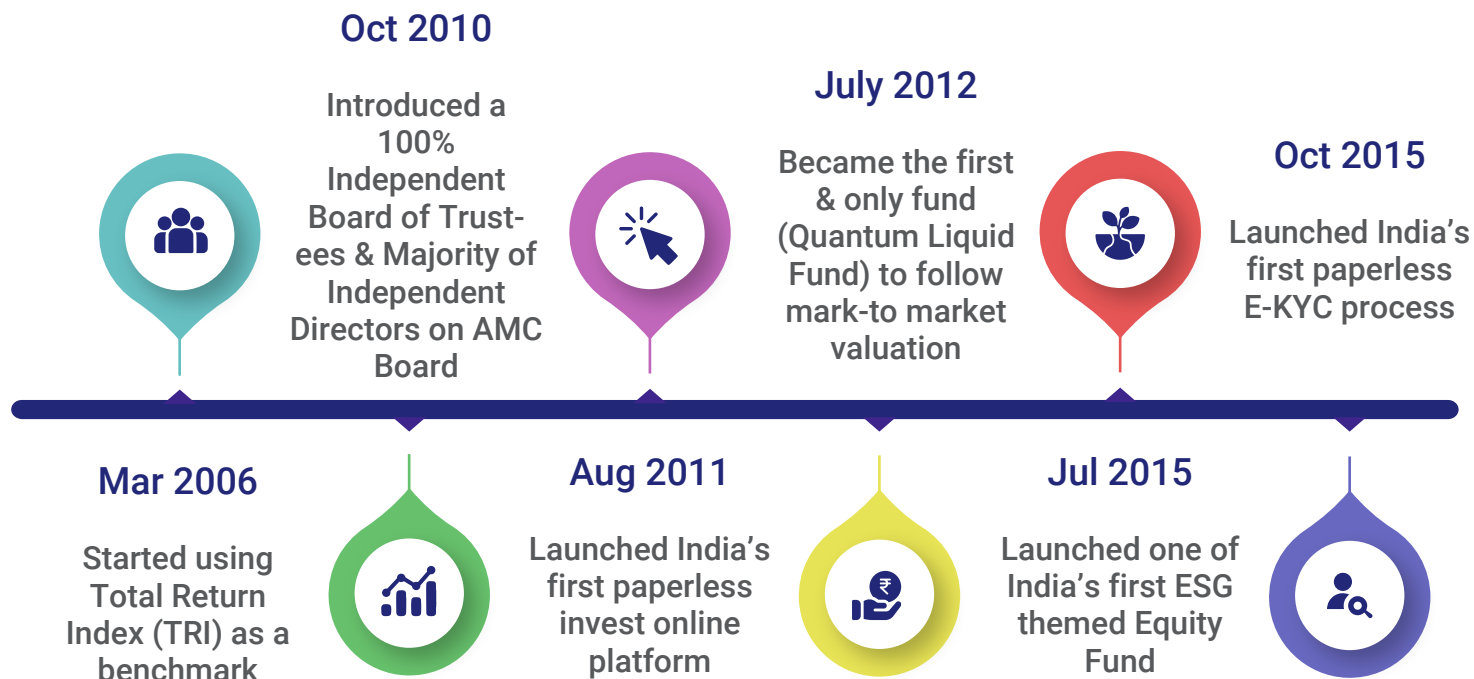
About Our Sponsor

Quantum Mutual Fund is sponsored by Quantum Advisors Private Limited, founded by Mr. Ajit Dayal in 1990 as India's first Institutional Equity Research House. The Sponsor is a SEBI Registered Portfolio Manager engaged in the business of rendering Portfolio Management and Advisory Services and is currently managing an AuM of over USD 2.01 Billion (~INR 17,559 crore) as February 28, 2025.

At Quantum, we strongly believe in conducting business on the foundation of ethics, integrity and disciplined investment process. The success of any enterprise rests on the character and values of the people who start it and their partners.

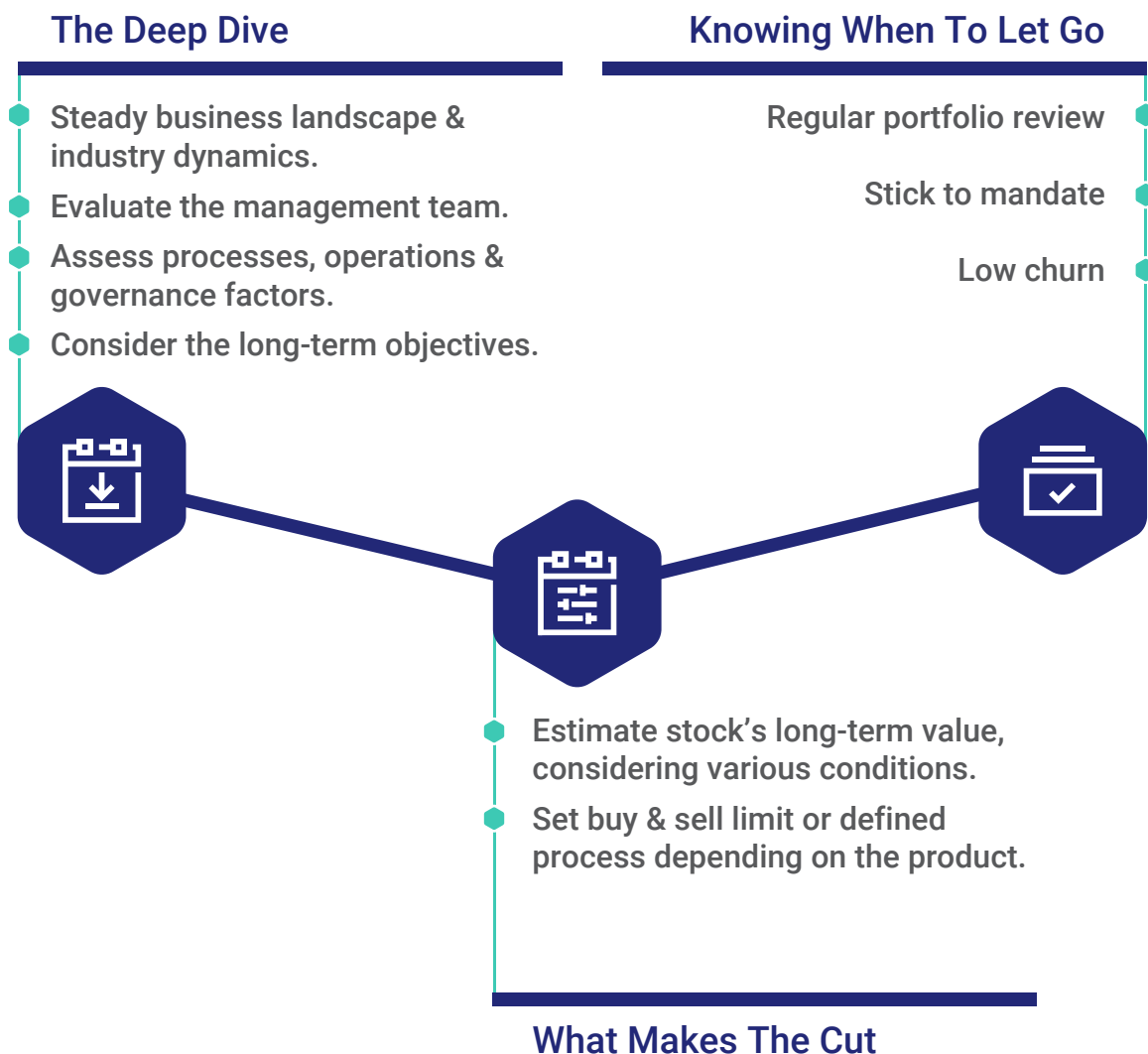
A Series of Industry Firsts

Quantum Mutual Fund



Our Investment Process

At the core of our investment philosophy lies a quintessential focus on the long term, we strive to discover straightforward and impactful investment solutions that cater to your customers every financial need.



Business Enhancement Initiatives

Path to Partnership (PTP)

PTP are physical events / training sessions that give MFDs (Mutual Fund Distributors) an opportunity to interact with fund managers & gain in-depth insight about the Indian Economy, MF industry and details regarding Quantum investment solutions. This can be done with MFDs as well as investors of our valued partners.

FM Connect

FM Connect helps MFDs gain in-depth understanding of the market and Quantum MF's plans & initiatives through in-person and online engagements with fund managers.

Knowledge Sessions

Specific skill development sessions organized for MFDs through webinars in collaboration with Morningstar, Café Mutual, etc.

Regular Updates on Your Business - QD, Newsletter, Quantum Weekly report

Regular Updates on Your Business: Enhancing Client Engagement and Insight

As a mutual fund distributor, staying connected with your clients and providing them with valuable insights is crucial. One effective way to achieve this is through regular updates via various channels. Strengthen your client relationships and encourage active participation in their financial planning journey.

Quantum Direct (QDs):

QDs are email newsletters that serve as a timely overview of market trends, fund updates, performance, and key developments in the Quantum Mutual Fund investing landscape. These include analyses of recent market events, fund manager outlooks & lot more that can add significant value to your clients' understanding of their investments.

Newsletters:

Newsletters are a curated compilation of relevant articles, market news, podcast from CIO, events and investment insights that can keep your clients informed and engaged on a regular basis.

Quantum Weekly Report:

The Quantum Weekly report offers detailed mutual fund industry overview and investment updates, empowering your clients to make informed decisions and optimize their investment outcomes.

Message to Our Partners

Dear Partner,

We recognize & would like to express our sincere gratitude for your support & the business you bring to us. At Quantum, we have introduced several initiatives to assist you in advising your clients with enhanced service efficiency and convenience to help them meet their financial goals.

With this Handbook we have tried to give you a quick snapshot of our product offerings & services to assist you in guiding your investors through their investment journey. Investment and growth go hand in hand which is why we will continue to innovate & strengthen our relationship.

As our valued partner you are the last mile touchpoint in the investment ecosystem helping your clients to make better informed financial decisions. We look forward to a long and fruitful relationship together as you grow your mutual fund business with us.

Happy Advising!

Team Quantum

Fund Management Team



Chirag Mehta
CIO QAMC

Funds Managed

Quantum Ethical Fund,
Quantum Equity Fund of Funds,
Quantum Multi Asset Fund of Funds,
Quantum ESG Best In Class Strategy Fund,
Quantum Gold Saving Fund,
Quantum Gold Fund
Quantum Small Cap Fund,
Quantum Multi Asset Allocation Fund.

Qualification

CAIA (Chartered Alternative Investment Analyst),
and MMS in Finance.



Pankaj Pathak
Fund Manager -
Fixed Income QAMC

Funds Managed

Quantum Dynamic Bond Fund
Quantum Liquid Fund
Quantum Multi Asset Allocation Fund

Qualification

Post Graduate Diploma in Banking & Finance
and CFA (Chartered Financial Analyst).



George Thomas
Fund Manager QAMC

Funds Managed

Quantum Long Term Equity Value Fund
Quantum ELSS Tax Saver Fund

Qualification

Post-Graduate Diploma in Management
(Finance) and CFA (Chartered Financial
Analyst).



Christy Mathai
Fund Manager QAMC

Funds Managed

Quantum Long Term Equity Value Fund
Quantum ELSS Tax Saver Fund

Qualification

CFA Charterholder & PGDM in Finance.



Abhilasha Satale
Associate Fund Manager
QAMC

Funds Managed

Quantum Small Cap Fund

Qualification

Masters in Business Administration.



Hitendra N Parekh
Fund Manager QAMC

Funds Managed

Quantum Nifty 50 ETF
Quantum Nifty 50 ETF Fund of Fund

Qualification

B.Com & Masters in Financial Management.



Rajorshi Palit
Associate Fund Manager
QAMC

Funds Managed

Quantum ESG Best In Class Strategy Fund

Qualification

Holds BBA.LLB (Hons.) Degree from
Symbiosis Law School



Ketan Gujarathi
Associate Fund Manager
QAMC

Funds Managed

Quantum ELSS Tax Saver Fund

Qualification

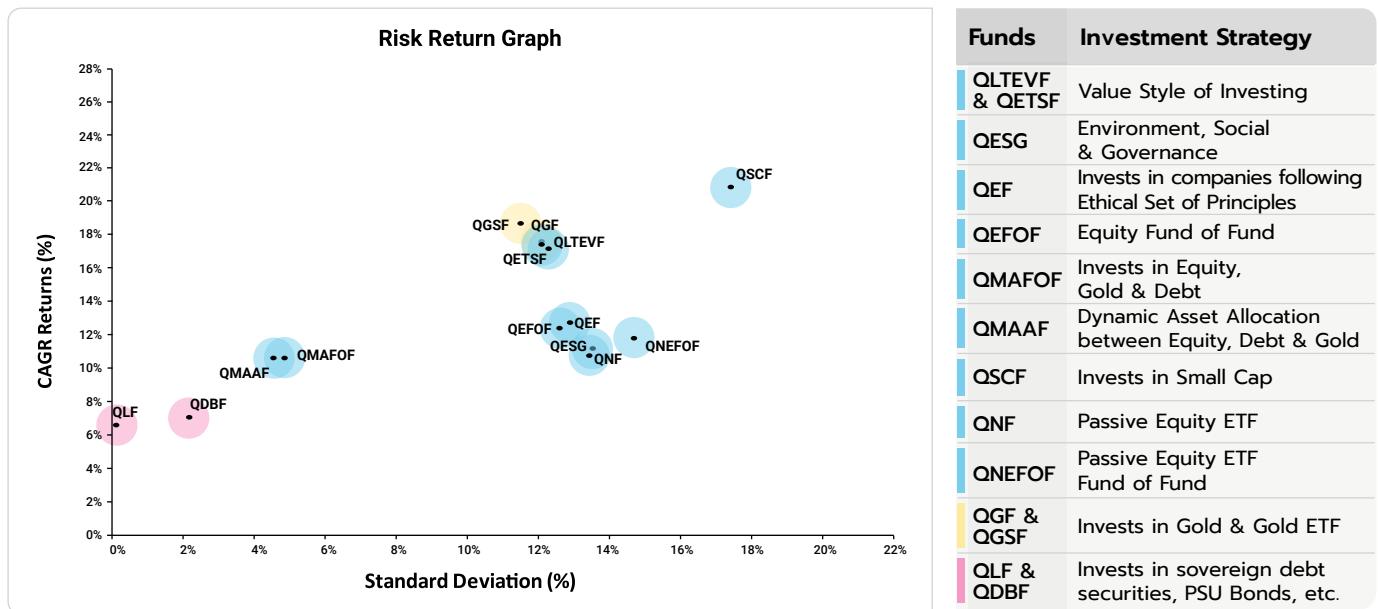
Holds B.E., MBA, CFA Charter Holder.
(Chartered Financial Analyst)

Note:- Mr. Rajorshi Palit - Associate Fund Manager of Quantum ESG Best In Class Strategy Fund with w.e.f 4th November 2024.
Mr. Ketan Gujarathi - Associate Fund Manager of Quantum ELSS Tax Saver Fund with w.e.f 1st February 2025.

Product Portfolio

Use our thoughtfully crafted 14 products as building blocks to help you fulfill your client's financial goals & ride the market swings with peace of mind.

The graph below gives a glimpse of all the Quantum Funds across asset classes of Equity, Debt & Gold.



The above chart is for illustration purpose only.

Note: Graph is based on 3 years CAGR Return & Standard Deviation of Scheme's Direct Plan data as on 28th Feb 2025. Quantum Nifty ETF Fund of Fund, Quantum Small Cap Fund, Quantum Multi Asset Allocation Fund and Quantum Ethical Fund are plotted based on theoretical risk return profile and as per the risk o meter of the respective Schemes. To view complete performance for the schemes refer from page 59.

Who can Partner with Us?

Any of the AMFI/ NISM Certified Intermediaries engaged in marketing and selling of Mutual Fund schemes are required to be registered with AMFI after passing AMFI/ NISM Certification Test and obtained ARN. The valid ARN card holders can empanel with Quantum Mutual Fund.

The below entities can partner with us:

- Individuals
- Sole proprietorships
- Partnership firms
- Companies
- Societies
- Banks / Trusts etc.



Steps to Become a Mutual Fund Distributor

Step 1: Pass the NISM-Series V-A: Mutual Fund Distributors certification examination.

The main motive of this examination is to ensure that the distributor has fundamental knowledge about the mutual fund. The validity of the certifications is three years from the date of clearing the exam. Minimum age for obtaining ARN is 18 years.

Step 2: Get the AMFI Registration Number (ARN)

The AMFI Registration Number (ARN) has been introduced as the unique code, which identifies the distributor as AMFI Registered Mutual Fund Distributor (ARMFD).

Step 3: Complete KYD (Know your Distributor) process for mutual fund distribution.

The Mutual Fund Distributor will have to submit their applications for registration with AMFI, along with the KYD application and the requisite documents could be submitted at any of the CAMS POS., a list of which is available at www.amfiindia.com or www.camsonline.com.

Once the NISM exam is cleared, then apply for the AMFI Registration Number (ARN). It is a unique code, or we can say a unique ID of every mutual fund distributor. Along with the ARN Number, also get an Employee Unique Identity Number (EUIN).

Step 4: Empanel with Quantum Mutual Funds

After availing of the AMFI Registration Number (ARN), you need to get empanelled with Quantum Mutual Fund to start the business.



Scan QR Code



Process for Online Empanelment

Online Empanelment - MFDs (Mutual Fund Distributor)

- a. MFDs can avail the facility of Online Empanelment.
- b. The online Empanelment can be done through our partner portal.
- c. Mandatory fields for Online empanelment is mentioned below:
 - I. ARN Number
 - II. Pan Number (As per KYD records)
 - III. Email and Mobile numberFurther for IFAs Nominee details are optional
Non individual MFDs applicable supporting documents like Board Resolution, list of the Authorized signatures, appreciable partnership deed, trust deed etc.
- d. Display the bank details as per AMFI data However user can change if the AMFI registered bank details are wrong / to change

Process for Offline Empanelment

Offline Empanelment – All Categories of Distributors

Checklist for Documents to be Submitted

Documents	IFA/ Proprietorship	Partnership Firm	Company	Documents	IFA/ Proprietorship	Partnership Firm	Company
Copy of the AMFI/NISM Certificate	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	KYD Acknowledgement	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Copy of the ARN Card	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Principal Officer Details, Authorised Signatory List	NA	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
				Partnership Deed	NA	<input checked="" type="checkbox"/>	NA
PAN Card copy	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Deed & Resolution Board Resolution	NA	NA	<input checked="" type="checkbox"/>
Memorandum & Articles of Association	NA	NA	<input checked="" type="checkbox"/>	Copy of Cancelled Cheque	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Brokerage Payment Process

- The AMC endeavours to make correct and early commission payment to all the distributors.
- If commission is withheld due to any regulatory reasons (like ARN validity expires/ EUIN remedial/ own investment / Self declaration not submitted etc), transaction / folio level data will be emailed to empaneled distributors on regular intervals

Important

- Distributors to be empaneled with AMC to process the transaction in regular plan and to get the Distribution commission.
- Commission will be paid to distributors who have complied with regulation regarding self declaration, KYD, EUIN and ARN validity as per AMFI.
- Distribution commission will be paid to the distributors on amount mobilized from PAN/ KYC complied investors
- Distributors will get commission on amount mobilized of their clients, but no commission is payable on their own investments. The distributors need to disclose all the commissions (in the form of trail commission or any other mode) payable to them for the different competing schemes of various mutual funds from amongst which the scheme is being recommended to the investor.



Employee Unique Identification Number (EUIN)

The SEBI circular issued on September 13, 2012 mandates mutual funds to record the Employee Unique Identity Number (EUIN) of the distributor's employee/relationship manager/salesperson involved in the sale of mutual fund products to investors, alongside the distributor's AMFI Registration Number (ARN).

In case where there is no interaction by the employee/salesperson/ relationship manager of the distributor/sub broker with respect to the transaction, investors are required to provide a duly signed declaration to this effect, as given in the Form. It is mandatory to obtain EUIN for every Salesperson / Employee / Relationship manager of the Intermediary for dealing (irrespective whether transactions are in the nature of execution or advisory) in mutual fund products. EUIN will assist in tackling the problem of mis-selling even if the employee/relationship manager/salesperson leaves the employment of the ARN holder / sub broker.

To facilitate brokerage payment processing, the distributor must furnish either a valid EUIN or a signed investor declaration. AMFI allows a 30-day validation period for transactions involving EUIN, starting from the transaction date or SIP registration date.

Declaration of Self Certifications

According to AMFI regulations, distributors are required to annually submit Declarations of Self Certification (DSCs) to AMFI in the specified format. The DSCs for the previous financial year must be submitted by June 30th of the current financial year. Failure to do so will result in brokerage being withheld until December 31st of the current financial year. If the DSCs are not submitted by December 31st, the withheld brokerage will be permanently forfeited.



ARN Renewal

Continuous ARN renewal ensures uninterrupted brokerage payment processing. If the ARN is renewed within 3 months of expiry, withheld brokerage from business conducted before the expiry will be released upon renewal (no brokerage will be paid for new business during the invalid ARN period). However, if renewal occurs after 3 months post expiry, all brokerage from previous business will be forfeited.

A photograph showing five wooden blocks arranged in a row on a light-colored surface, spelling out the word 'RENEW' in white capital letters. To the right of the blocks is a vertical stack of several gold coins. The background is a soft, light green gradient. There are decorative teal and blue shapes in the corners of the slide.

RENEW

Partner Initiatives



Partner Corner on Website

Partner Corner is a gateway to a range of customised services to make your experience simpler and convenient at all times.

As a partner you can explore services that can enhance business efficiencies:



**Upcoming / Dedicated
Webinars & Events**



**Co-branded
Collateral**



**Fund manager
Insights & Thought
Leadership**



**Distributor
Embedded URL**

Co-Branding Tool

Here's a handy co-branding tool that allows you to gain easy and instant access to fund marketing collaterals which can be customized with your Logo, name, contact details, etc. These fund specific marketing materials can be easily sent to interested investors with your details to better serve & help them take the right investment options.



Brochure

Products specific detailed one pagers giving insight into key fund benefits

[Click here](#)



PPT

Product centric information to help understand the investment philosophy and process

[Click here](#)



Infographics

Share bite sized product benefits digitally through social media channels

[Click here](#)



Factsheet

Monthly factsheet offering overview of fund performance

[Click here](#)

Financial Transactions



Purchase Transactions

Scheme wise cutoff time and NAV applicability

	Application Time	Credit in Scheme Bank A/c	NAV Applicability
Liquid Schemes	On or Before 1.30 PM on a Business Day	On or Before 1.30 PM on a Business Day	Closing NAV of the day immediately preceding the business day of receipt of application (T-1)
	On or Before 1.30 PM on a Business Day	After 1.30 PM on a Business Day	Closing NAV of the day immediately preceding the next Business Day (T)
	After 1.30 PM on a Business Day	On or Before 1.30 PM on a Business Day	Closing NAV of the day immediately preceding the next Business Day (T)
	After 1.30 PM on a Business Day	After 1.30 PM on a Business Day	Closing NAV of the day immediately preceding the next Business Day (T)
Non-Liquid Schemes	On or Before 3.00 PM on a Business Day	On or Before 3.00 PM on a Business Day	Closing NAV of the same Business Day (T)
	On or Before 3.00 PM on a Business Day	After 3.00 PM on a Business Day	Closing NAV of the next Business Day (T+1)
	After 3.00 PM on a Business Day	On or Before 3.00 PM on a Business Day	Closing NAV of the next Business Day (T+1)
	After 3.00 PM on a Business Day	After 3.00 PM on a Business Day	Closing NAV of the next Business Day (T+1)

Switch Transactions

Scheme wise cutoff time and NAV applicability

Switch-Out	Switch-In	Transaction Day	NAV Applicability	
			Switch-Out	Switch-In
Liquid	Liquid	Followed by Business Day	T	T
		Followed by Non-Business Day	Day preceding the next Business Day	Day preceding the next Business Day
	Debt	Followed by Business day	T	T+1
		Followed by Non-Business Day	Day preceding the next Business Day	T+1
	Equity	Followed by Business day	T	T+1
		Followed by Non-Business Day	Day preceding the next Business Day	T+1
Debt	Debt	Any Business Day	T	T+1
	Liquid	Followed by Business day	T	T
		Followed by Non-Business Day	T	Day preceding the next Business Day
	Equity	Any Business Day	T	T+1
Equity	Equity	Any Business Day	T	T+2
	Debt	Any Business Day	T	T+2
	Liquid	Followed by Business day	T	T+2-1
		Followed by Non-Business Day	T	T+2-1

Note: 1) If the switch/change is within two plans of the same scheme having the same portfolio, the switch would happen on the date of receipt of the switch request irrespective of any amount.

2) Cut off time for all switch transactions will be 3.00 p.m on any business day

Redemption Transactions

Scheme wise cutoff time and NAV applicability

Scheme Type	Application Time	NAV Applicability
All schemes (except - ETF schemes)	On or Before 3.00 p.m	For Equity Oriented schemes - Day of receipt of application (T) For Liquid Scheme - Day prior to next bussiness day.
	After 3.00 p.m.	Next Business day

Payment process : As per SEBI guidelines, redemption proceeds should be dispatched to the unit holder within 2 business days from the specified redemption date for equity-oriented schemes and within one business day for schemes other on equity-oriented schemes.

Systematic Transactions

Systematic Investment Plan (SIP)

SIP facilitates the investor to invest a fixed amount on any day for a predefined period.

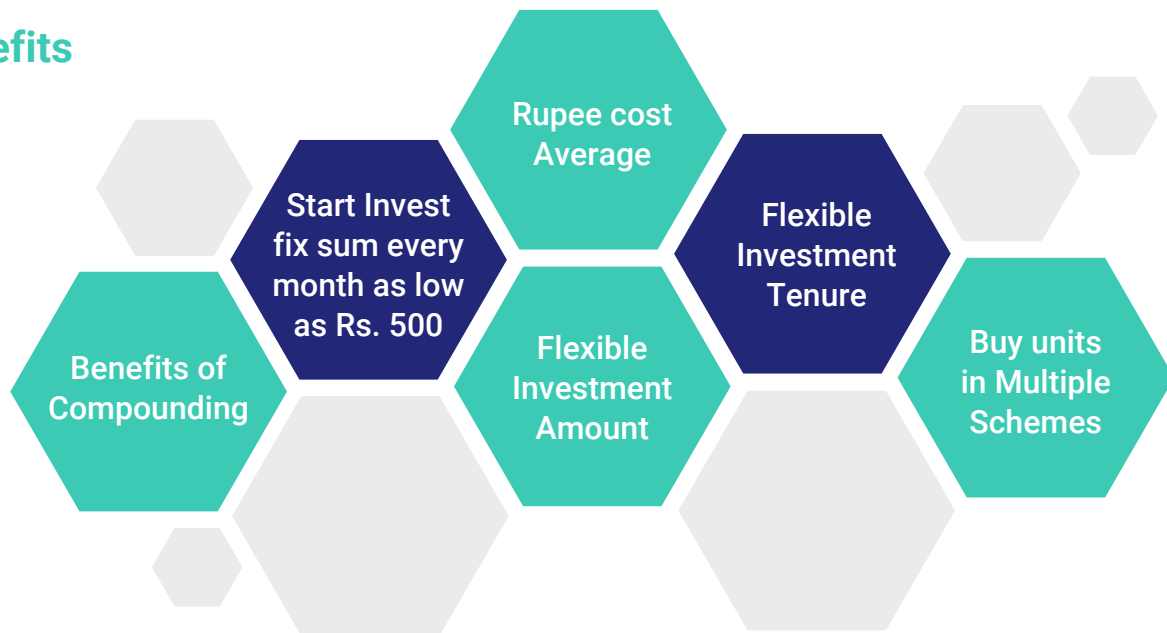
Modes of Registration of Systematic Investment Plan (SIP):

One Time Mandate (OTM)

eNACH

ISiP

Benefits



Systematic Transactions – Systematic Investment Plan

Frequency of SIP	Eligible dates for effect	Minimum amount per Instalment	Minimum term/duration applicable
Daily	All Business days	₹100 and in multiple of ₹1 thereafter (for ELSS minimum ₹500 and multiple of ₹500)	30 Business days
Weekly	Any day of the week	₹500 and in multiple of ₹1 thereafter (for ELSS multiple of ₹500)	10 instalments
Fortnightly	Any day of alternative Week	₹500 and in multiple of ₹1 thereafter (for ELSS multiple of ₹500)	10 instalments
Monthly	Any date (except 29, 30, 31st)	₹500 and in multiple of ₹1 thereafter (for ELSS multiple of ₹500)	12 instalments
Quarterly	Any date (except 29, 30, 31st)	₹500 and in multiple of ₹1 thereafter (for ELSS multiple of ₹500)	12 instalments

All schemes (except ETF) accepting SIPs

Systematic Transactions

SIP Pause

SIP Pause is a facility that allows investors to pause their existing SIP for a temporary period. The applicant will have the right to Pause SIP at any time he or she so desires by completing the SIP Pause process online (currently available for SIP's registered from AMC's portal) or by sending an email from registered Email address of investor to Transact@QuantumAMC.com mentioning the SIP and pause details (for all SIP's).

- Notice of Pause should be received 21 days prior to the subsequent SIP date.
- Investor can pause existing SIP without discontinuing it.
- The SIP shall restart from the immediate next instalment of the respective frequency opted by investor after the completion of Pause period.
- SIP Pause facility will allow existing investor to 'Pause' their SIP for a specified period i.e. Minimum 1 month and Maximum 6 months. The SIP Pause tenure shall not exceed more than 6 months.
- The SIP Pause facility is available for all frequencies.

Systematic Transactions

Systematic Transfer Plan (STP)

This Plan facilitates the investor to Transfer a fixed amount from one scheme to another scheme of the Mutual Fund. The investor would need to fill in an STP application form. Details such as amount, frequency, from & to date, source and target scheme needs to be provided.

Frequency of STP	Eligible dates for effect	Minimum amount per Instalment	Minimum term/duration applicable
Daily	All Business days	₹100 and in multiple of ₹1 thereafter (for ELSS ₹500 and multiple of ₹500)	30 Business days
Weekly	Any day of the week	₹500 and in multiple of ₹1 thereafter (for ELSS multiple of ₹500)	10 instalments
Fortnightly	Any day of alternative Week	₹500 and in multiple of ₹1 thereafter (for ELSS multiple of ₹500)	10 instalments
Monthly	Any date (except 29, 30, 31st)	₹500 and in multiple of ₹1 thereafter (for ELSS multiple of ₹500)	12 instalments
Quarterly	Any date (except 29, 30, 31st)	₹500 and in multiple of ₹1 thereafter (for ELSS multiple of ₹500)	12 instalments

On the date of STP the amount gets automatically switched from the source scheme to the target scheme at the applicable NAV. In case the STP date is a non-business day, the next business date is considered for processing the transaction.

Available dates for Monthly and Quarterly STP are Any date (except 29, 30, 31st). Daily – All business days / Weekly – Any day of the week / Fortnightly - Any day of alternative Week.

The application for start of STP should be submitted to Official Point(s) of Acceptance at least 5 business days before the date of commencement/start date of STP. Unitholder may change the amount/ frequency by giving written notice to any of the Official Point(s) of Acceptance at least 5 business days prior to next transfer/STP execution date.

Unitholder can discontinue STP facility at any time by sending a written notice to any of the Official Point(s) of Acceptance, at least 5 business days prior to next transfer/STP execution date.

Systematic Transactions

Systematic Withdrawal Plan

This Plan facilitates the investor to withdraw fixed amount from any scheme of the Mutual Fund at a regular interval. The investor would need to fill in an SWP application form. Details such as amount, frequency, from & to date, source scheme needs to be provided.

Frequency of SWP	Eligible dates for effect	Minimum amount per Instalment	Minimum term/duration applicable
Weekly	Any day of the week	₹500 and in multiple of ₹1 thereafter	10 instalments
Fortnightly	Any day of alternative Week	₹500 and in multiple of ₹1 thereafter	10 instalments
Monthly	Any date	₹500 and in multiple of ₹1 thereafter	10 instalments
Quarterly	Any date	₹500 and in multiple of ₹1 thereafter	10 instalments

Available dates for Monthly and Quarterly SWP are Any date. Weekly – Any day of the week / Fortnightly - Any day of alternative Week

The SWP will terminate automatically if all the units are withdrawn from the folio, or if the enrolment period expires, whichever is earlier.

The application for start of SWP should be submitted to Official Point(s) of Acceptance at least 5 business days before the date of commencement/start date of SWP.

Unitholder may change the amount/frequency by giving written notice to any of the Official Point(s) of Acceptance at least 5 business days prior to next SWP execution date.

Unitholder can discontinue SWP facility by sending a written notice to any of the Official Point(s) of Acceptance, at least 5 business days prior to next SWP execution date.

SWP will be terminated automatically in case of a Zero balance in the respective Scheme-Folio on the run-date or expiry of the enrolment period whichever is earlier.

Stay Connected

Call us at:



1800 209 3863 / 1800 22 3863 (Toll-Free)
(Int.) +91 022 2278 3863 / +91 022 6829 3863



Partner Care Timings:

Monday to Saturday between 9.30 am
to 6.30 pm (except for public holidays)



Write to us at

PartnerCare@QuantumAMC.com



Give us a Missed Call on
022 6829 3807



WhatsApp on
9243223863



SMS to 9243223863

**The information contained herein is solely for private circulation for reading/understanding of registered advisors/ distributors and should not be circulated to investors/prospective investors.*

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

Aadhaar-PAN Linking Guidelines

Compulsory Aadhaar-PAN Linkage:

- For all resident individuals, it is mandatory to link PAN with AADHAR*.
- Failure to link PAN with Aadhaar renders the PAN inoperative, restricting transactions associated with it.

Procedures for NRIs:

- NRIs must update their tax status in income tax records for PAN to remain operative.
- Merely having NRI status in investments doesn't fulfill the Aadhaar-PAN linking requirement.

*Exemptions:

AADHAR linking exempted for below category of investors:

1. A non-resident taxable person as per the Income-tax Act, 1961
2. Individuals residing in the states of Jammu and Kashmir, Assam and Meghalaya.
3. Individual aged more than 80 years (Super Senior Citizens).
4. Persons who are not citizens of India.

Aadhaar-PAN Linking Methods

Web: Visit the Income Tax e-filing portal and complete the linking process, ensuring you have your mobile phone ready for OTP verification.

SMS: Send UIDPAN (space) 12-digit Aadhaar number (space) 10-digit PAN number from your registered number to 567678 or 56161.

● Checking Linking Status:

To verify the Aadhaar-PAN linking status, [click here](#).

● Updating Linking Status:

To update the Aadhaar-PAN linking status, [click here](#).

● Consequences of not linking PAN with Aadhaar:

- PAN becomes inoperative.
- PAN-based KYC becomes invalid.
- All transactions, including systematic transactions, are restricted.
- IDCW reinvestments and payouts are moved to unclaimed funds.
- Form 15G/H submissions are invalid.
- The TDS will be applicable at a higher rate.
- Distributor commission payments for invalid KYC investors are withheld.

Single Occurrence Authorization (SIP/Lumpsum)

National Automated Clearing House (NACH) is a one-time registration process which allows an investor to make lump sum / SIP investments in mutual funds. NACH is a centralized and improved clearing service.

Starting April 1, 2024, mandates maximum duration of the mandate should be 40 years from the date of issuance, as per National Payments Corporation of India(NPCI)s guidelines, Maximum amount of E-Mandate is enhanced to 1 crore.

Any mandate lacking the specified narration will be declined. It is therefore advisable to utilize new mandates with pre-printed narrations indicating a maximum tenure of 40 years for SIP or lumpsum registration.

The 'until cancelled' option will be discontinued, and investors must now specify an end date not exceeding 40 years from the issuance date, in accordance with the aforementioned guideline.

Existing perpetual SIPs will remain unaffected.

Note: ISIP registered (URN based) can be registered for perpetual period.

Folios without PAN/PEKRN

PAN updates can be made by submitting a request via the following link:

- <https://mfs.kfintech.com/panupdation/>
- Select the fund name and provide the mandatory information to get the status of folios without PANs.
- Ensure a self-attested copy of the PAN card is available for upload.
- Upload the PAN copy separately for each folio.

Alternatively, Investors can also email us a scanned copy of the PAN at CustomerCare@QuantumAMC.com

Validation of Know Your Customer (KYC)

SEBI has mandated the validation of KYC records for all existing clients who have utilized Aadhaar or other officially valid documents (OVD).

For KYC records where Aadhaar was used as the OVD during the initial KYC process, KRAs have sent emails containing a link to validate the Aadhaar information. Investors without email IDs must revalidate their KYC by submitting a physical KYC modification request.

KRAs will verify PAN details (including PAN-Aadhaar linkage), name, address, email address, and mobile number. KYC status will be updated as 'KYC Validated' if all mentioned attributes are verified with official databases. KYCs where any of the mentioned attributes cannot be verified will be updated as 'KYC Registered'.

SEBI Registered Intermediaries (SRIs) onboarding new investors with a 'Registered' KYC in such instances, intermediaries by producing the KYC documents again, even if there is no change in KYC information already available. If the KYC is 'On Hold' or 'Rejected', the SRI is prohibited from allowing further transactions in the securities market until the KYC status is updated to 'Registered' or 'Validated'.

Partners can refer to CVL KRA communications numbered 176, 182, and 184 for detailed information on the KYC validation process, available for viewing on www.cvlkra.com under the download section.

Continued...

Know Your Customer (KYC)

Applicable with effect from April 01, 2024- As per the SEBI Circular No. SEBI/HO/MIRSD/SECFATF/P/CIR/2023/169 dated October 12, 2023, as amended from time to time, the KYC Registration Agencies (KRAs) shall verify the following attributes of records of all investors within 2 days of receipt of KYC records:

- PAN
- Name
- Address
- Mobile number
- Email id

If KRA is unable to verify the above attributes, such investors shall not be allowed to transact further until the attributes are verified. Investors should ensure that they provide their valid contact details [Email id / Mobile Number] to KRAs.

KYC Status	Existing Investor	New Investor	Remediation
KYC Validated – Existing records prior to April 01, 2024	No impact	No impact	Not Required
KYC Registered	No impact	Allowed, Fresh set of KYC documents to be submitted	Investor can do a re-KYC using OVD (Officially Valid Document).
KYC On-Hold / KYC Rejected	Transactions will not be allowed	Transactions will not be allowed	Investor should ensure to do the following to change the status to Registered: 1. To complete PAN Aadhaar seeding. 2. Update email id / mobile and validate. 3. re-submit the official valid documents to KRA.

If KRA is unable to verify the above attributes, such investors shall not be allowed to transact further until the attributes are verified. Investors should ensure that they provide their valid contact details [Email id / Mobile Number] to KRAs.

Continued...

Know Your Customer (KYC)

Note: SEBI vide its email dated May 14, 2024, has reviewed the status of validation of KYC records by KRAs and decided the following:

1. NRI's provisions with respect to portability of KYC Records have been relaxed for one year i.e. till April 30, 2025.
2. Transaction Validation by either one of the attributes namely Mobile or Email is considered valid (including NRIs).

The existing Investors, as on March 31, 2024, in whose KYC status cannot be verified by the KRAs shall be allowed to exit (sale/redemption, etc.).

Clients can visit their respective KRA websites listed below and follow the instructions to validate their details:

- CVL : [Click here](#)
- Karvy : [Click here](#)
- CAMS : [Click here](#)
- NDML : [Click here](#)
- DOTEX : [Click here](#)

Alternatively, not only existing investors but any new or existing investors can apply for re-KYC from our ekyc portal www.QuantumAMC.com/ekyc/ekycnew

Nomination for Mutual Fund Investments

According to the SEBI circular issued on June 10, 2024, all Individual investors (including sole proprietor of sole proprietary concern) are advised to update their existing folios with a 'choice of nomination'. Nomination can be made only by individuals. Non-individuals, including a Society, Trust, Body Corporate, Partnership Firm, Karta of HUF, a Power of Attorney holder and/or Guardian of Minor unitholder, cannot nominate. Nomination is not allowed in a folio of a minor unitholder. Any individual holding a mutual fund investment, singly or jointly, can nominate one or more persons, including resident and non-resident investors.

As per SEBI regulations, Investor can nominate up to 3 individuals, these nominees can be family members or dependents. When nominating more than one person, investor must specify the distributed percentage among the nominees, this percentage of allocation/share of each nominee in whole numbers without decimals. The total allocations/shares of all nominees should add to 100%. If not specify the percentage of allocation/share of each nominee, the AMC will make equal allocations to all nominees. All unitholders must sign the Nomination opt-in/opt-out form irrespective of the holding mode ("Anyone/Either or Survivor").

To qualify as a nominee, the following criteria must be fulfilled:

- The nominee must be an individual, not an institution or organization.
- If the nominee is a minor, a guardian details to be provided to manage the funds until the minor attains major.
- NRIs can also be nominated, provided they comply with the exchange control rules in force at the time.
- A nomination can also be made to the Central Government, any state government, local authority, or any person designated by virtue of their office, or to a religious or charitable trust. However, companies, partnership firms, Hindu Undivided Families (HUFs), and societies or trusts that are not religious or charitable cannot be nominated.

For new individual investors with mode of holding as single, providing a 'Choice of Nomination' is mandatory.

Modification of Existing Nomination

The investor can update the existing nomination at any time and may make changes, including:

1. Changing a single nominee to multiple nominees or vice versa
2. Changing the percentage of allocation/share of each nominee
3. Removing the name(s) of existing nominee(s) and including new nominee(s)
4. Deleting the nominee(s) and opting out of it
5. Any other nomination modification that you desire, within the nomination rules

Any modification in the nomination will override the existing nomination, if any.

Partners / Advisors are encouraged to actively assist and motivate their clients to update their folios by providing their choice of nomination (Nomination opt-in/opt-out) for all active folios. This guidance aligns with the recent regulatory circular issued by the authorities. By ensuring that clients complete this process, you help them comply with the new requirements and safeguard their investments effectively.

Investors have several options to update their nomination or opt out, including:

- Accessing their accounts on AMC website : www.QuantumAMC.com
- RTA website : <https://mfs.kfintech.com/investor/>
- MF Central website : <https://www.mfcentral.com/>
- Alternatively, investors can submit nomination form at the nearest AMC branch or Kfintech investor service center, signed by all holders. Nomination forms are available on www.QuantumAMC.com.

Two Factor Authentication (2FA) for Transactions

- Two-factor authentication (2FA) is required for all transactions, including systematic registrations, conducted online.
- Validation will occur using the email address or mobile number registered in the user's folio.
- Failure to pass 2FA validation may lead to transaction processing delays. Investors must ensure that their folio contains a valid email address/mobile number, while intermediaries must update their respective databases accordingly.
- Channel partners and exchange platforms verify email addresses and mobile numbers during initial transactions, and only validated contact details are accepted for future transactions in the folio.
- Therefore, it's crucial to use validated email addresses and mobile numbers for subsequent transactions.

IDCW Transaction

● Payment Procedure:

In accordance with SEBI guidelines dated 25th Nov 2022, IDCW proceeds are to be sent to the unitholder within 7 business days from the designated IDCW record date. Nevertheless, the Fund aims to process IDCW payments within 7 working days, pending verification.

Note: Investors are advised to ensure the accuracy of their complete bank account details to facilitate seamless electronic payments. The required details include:

- Bank Account Number
- Bank Branch
- Bank City
- IFSC
- MICR
- Type of Account (Savings, Current, NRE, NRO, & FCNR)

Third Party Investment

Applications for unit subscriptions accompanied with Third Party Payments, defined as payments made through an instrument issued from a bank account other than that of the beneficiary investor (i.e., the first named applicant), are permissible only in certain exceptional cases, provided the required documentation/declaration are submitted. These exceptional cases include:

- Payment by a Parent/Grandparent/Related Person on behalf of a minor.
- Payment by an Employer on behalf of employee(s) under Systematic Investment Plan (SIP)/ Payroll deductions and Lump sum.
- Payment by a Custodian on behalf of an FPI or a Client

Provided that the Full Name and relationship of the Third Party with the Beneficial Investor are provided detail. In the case of a payment instrument issued from a joint bank account, the first named applicant investor must be one of the joint holders of the bank account from which the payment instrument is issued.

The following document(s) are required to be submitted by the Third Party according to the selected mode of payment:

Mode of Payment	Documents
Cheque Mode	If account number and account holder name are not pre-printed on the cheque: <ol style="list-style-type: none"> 1. A copy of the bank passbook or a statement of the bank account containing the name and address of the account holder and account number attested by AMC/RTA by verifying the original documents (OR) 2. A letter from the bank manager certifying the bank details with his/her full signature, name, employee code, bank seal, and contact number on the banker letterhead.
RTGS, Bank Account-to-Account Transfer, NEFT, etc.	Acknowledged copy of the instruction to the bank stating the account number debited.

Non Financial transaction (Investors)

Change of Address

For KYC-compliant folios/investors, a change of address requires the submission of the following documents to the designated intermediaries of the KYC Registration Agency:

- KYC form
- Identity Proof : PAN
- Anyone of the below address proof's:
 1. Passport
 2. Driving License
 3. Masked Aadhaar
 4. Voter Id
 5. Job Card issued by NREGA duly signed by an officer of a State Government
 6. Letter issued by National Population Register
 7. Other documents notified by central government
- Any other document specified by the KYC Registration Agency from time to time.

Non Financial transaction (Investors)

Change/Updation of Bank Mandate

Change of bank details will be processed upon submission of proof for the new bank, along with a written request signed by the investor, according to the mode of holding. Acceptable proofs for the old and new bank accounts include:

- Original cancelled cheque - OR
- Self – certified cheque Copy OR
- Self – certified Bank passbook/Bank statement OR
- Bank letter, on letterhead of the bank duly signed by branch manager/ authorized personnel stating the investor's bank details.

Note:

1. In case of photocopies of above documents are submitted, unit holder must procure original for verification at any of the AMC branches or official point of acceptance of transactions.
2. The name printed on the documents should be same as per the folio.
3. The AMC reserves the right to accept the request, subject to additional verifications, production of additional documents or In Person Verification of unit holder.
4. In case of Minor's folio, bank account of the minor or a joint account of the minor with the guardian must be provided for new bank mandate.
5. All documents submitted should clearly evidence the bank name, account number and name of all account holders.

Non Financial transaction (Investors)

Multiple Bank Mandate Registration

Individuals/HUFs can register up to 5 different bank accounts, while non-individuals can register up to 10 different bank accounts for a folio. To add multiple bank details, investors need to submit the following supporting documents:

Original cancelled cheque - OR

Self - certified cheque Copy OR

Self - certified Bank passbook/Bank statement OR

Bank letter, on letterhead of the bank duly signed by branch manager/ authorized personnel stating the investor's bank details.

1. In case of photocopies of above documents are submitted, unit holder must procure original for verification at any of the AMC branches or official point of acceptance of transactions.
2. The name printed on the documents should be same as per the folio.
3. The AMC reserves the right to accept the request, subject to additional verifications, production of additional documents or In Person Verification of unit holder.
4. In case of Minor's folio, bank account of the minor or a joint account of the minor with the guardian must be provided for new bank mandate.
5. All documents submitted should clearly evidence the bank name, account number and name of all account holders.

Change of Contact Details

Investors can change their Email Id and Mobile Number online provided any one of the contact details like Email Id or Mobile Number registered in Folio is active. If they are inactive, they can send a request letter duly signed to our branch address or Kfintech Collection Centre nearest to you. Alternatively, a signed written request can be submitted at any customer service point if both mobile number and email ID are not registered.

Non Financial transaction (Investors)

Consolidation of Folios

Consolidation can be performed for multiple folios provided that the following details match across all folios:

- PAN Number of all holders
- All Holders' names with same order of names in all folios
- Tax status of the investor to be same in all folios
- Mode of holding in all the folios
- Mode of holding to be physical.

Non Financial transaction (Investors)

Change of Name

Common documents for name change:

- 1. Letter specifying name, folio number, duly signed by all unit holders (if mode of holding joint) or authorized signatories in case of corporate entities.
- 2. KYC Acknowledgement with new name
- 3. Bank's Cheque copy with new name
- 4. If signature change - banker attestation of new signature
- Additional below documents if:
 - Change in Name due to Marriage – Notarized copy of Marriage Certificate
 - Change in Name due to Divorce –
Divorce Declaration form duly witnessed
Attested copy of the Court order stamped by Executive Magistrate or Judicial Magistrate apart from having Court stamp.
 - Change in Name due to adoption –
Attested copy of Court order duly stamped and also attested by Executive Magistrate /Judicial Magistrate/Notary.
 - Change in Name for other reasons -
Notarized copy of Judgment/Gazette Notification
 - Change in Name for Corporate Investors -
Attested copy of Certificate of Incorporation at Registrar of Companies (ROC)
Memorandum of Articles & Articles of Association.
List of Authorised Signatories, Board Resolution.

Note - If any Signature Change - Due marriage/divorce - old and new signature to be provided (old signature should be tallied with our records)

Non Financial transaction (Investors)

Change of Tax Status

Offline Process:

- Submit a request for change in details/tax status and FATCA form by submitting a duly filled and signed KYC Application Form with supporting documents for change in status from RI to NRI or vice versa.
- After receipt of acknowledgement from the KRA, you need to submit a duly signed Tax status change request form to this effect mentioning the new bank account details with a cancelled cheque having name and account number preprinted/ Bank Statement/ Certified copy of the Passbook to the AMC.

Online Process after change of Tax Status in KYC:

- Login to <https://secure.quantumamc.com>
- Visit Manage Account > Modify Resident Status
- A pop-up message will be displayed requesting to submit a change in resident status request to the KRA > Click on 'OK'
- Enter the required details and upload the documents as per the instructions provided and click on submit
- An on-screen message will be displayed for the receipt of the request. An email and SMS will be triggered to the registered email id and mobile number respectively.

NOTE: If photocopy of any document is submitted, it should be certified by the bank or investors must produce original for verification. In case of change of tax status from RI to NRI, the bank account type should be a NRO Bank Account (Non- Resident Ordinary) only as the investment amount earlier was non-repatriable. In case of change of tax status from NRI to RI, the bank account type should be Savings Bank Account only.

SEBI Regulations - Mis Selling

Regulation 4 of the SEBI (Prohibition of Fraudulent and Unfair Trade Practices Relating to Securities Market) Regulations, 2003, prohibits any person from engaging in manipulative, fraudulent, or unfair practices in securities market. Regulation 4(2) states that Dealing in securities shall be deemed to be manipulative, fraudulent or an unfair trade practice if it involves following:

Regulation 4(2) (s) - mis-selling of securities or services relating to securities market;
Explanation - For the purpose of this clause, "mis-selling" means sale of securities or services relating to securities market by any person, directly or indirectly, by –

- (i) knowingly making a false or misleading statement, or
- (ii) knowingly concealing or omitting material facts, or
- (iii) knowingly concealing the associated risk, or
- (iv) not taking reasonable care to ensure suitability of the securities or service to the buyer; and

Regulation 4(2)(k) - disseminating information or advice through any media, whether physical or digital, which the disseminator knows to be false or misleading in a reckless or careless manner and which is designed to, or likely to influence the decision of investors dealing in securities.

Regulatory Actions

Suspension / Withholding of Commissions / Cancellation of AMFI Registration / License
To Know More in detail please [click here](#)

Follow AMFI Code of Conduct & Avoid Unhealthy Market Practices

Key Obligations



Fiduciary Duty: Prioritize investor interests, avoid conflicts of interest, and promote ethical practices.



Compliance: Adhere to SEBI regulations and AMFI guidelines, including data privacy and investor confidentiality.



Client Relations: Provide full disclosure, and avoid misrepresentation.



Infrastructure & Record Keeping: Maintain robust physical and digital infrastructure, internal controls, and comprehensive records.



Training & Integrity: Regular training for MFDs on compliance, ethical standards, and maintaining industry integrity.

Common mis-selling practices and Red Flags

- High risk fund misrepresentation.
- Inadequate Disclosures of risks.
- Concealment of fees, charges and exit loads.
- Misleading information about fund performance.
- Non – disclosures of lock in periods.
- Emotional Pressure and fear.
- Guaranteed Returns.
- Promoted as Risk Free.
- Churning and unnecessary portfolio turnover.
- Promise of unreasonable returns.

Circulars

Treatment of Transactions received with invalid ARNs:

Transactions received in the Regular Plan with an Invalid ARN should be processed in the Direct Plan/reject and refund the amount as per AMFI guidance from time to time of the same Scheme (regardless of their initial reporting in the Regular Plan), following the logic outlined below:

Transaction Type	Primary ARN			SUB distributor ARN		EUIN*	Execution Only Mentioned	Regular Plan/ Direct Plan
	Valid	Invalid	Empanelled	Valid	Invalid	Valid	Yes	
Lump Sum/ Registration	Y		Y				Y	Regular
	Y		N	Not applicable				Direct
	Y		Y	N.A.	N.A.	N.A.	N	Regular*
	Y		Y	Y		Y		Regular
		Y						Direct
	Y		Y	Y			Y	Regular
	Y		Y		Y			Direct

Transactions received from through online mode with an invalid ARN will be rejected rather than processed under the Direct Plan for the following reasons:

- The settlement of units will fail at the clearing corporation due to an ISIN mismatch.
- If the RTA processes the transaction under the Direct Plan, the AMC will encounter issues with corporate actions, as the clearing corporation will be unable to reconcile and credit the units.
- The distributor or broker will be unable to download the reverse feed or mail-back report for transactions reported by them if processed under the Direct Plan.

Continued...

Circulars

*Invalid ARN Code as mentioned above indicates any of the below scenarios:

- 1) ARN validity period expired.
- 2) ARN cancelled /terminated.
- 3) ARN suspended.
- 4) ARN Holder deceased
- 5) Nomenclature change, as required pursuant to IA Regulations, not complied by the MFD.
- 6) MFD is debarred by SEBI.
- 7) ARN not present in AMFI ARN database.
- 8) ARN not empanelled with an AMC.

Circulars

Action to be taken by AMCs if the name of an unrelated individual is found to have been added as Joint holder in folios of multiple unrelated 1st holders

- AMCs and RTAs shall identify folios with unrelated joint holders and take actions to safeguard the interest of the first holder, including putting a temporary "Stop" or "Lock" on such folios and re-verifying the registered bank account.
- For folios with investments through an MFD or RIA, may seek a written explanation from the MFD/RIA regarding the addition of an unrelated person as the 2nd or 3rd holder. Additionally, the MFD/RIA to obtain written confirmation from the 1st holder (except if they are a relative) that the addition was made with their knowledge and consent, and to submit this confirmation to the respective RTAs.
- If these transactions were made under a Regular Plan, the trail commission for the ARN holder on these folios will be withheld until the issues with the folios are remediated.
- Remediation must be done through written confirmation only, with the 1st holder's signature verified against the registered signature on the folio. Verbal or email confirmations are not acceptable.
- Until written confirmation or declaration from the 1st holder is received as outlined above, all transactions—such as redemptions, changes in bank mandates, updates to contact details, and transmissions—will be subject to enhanced due diligence.

Circulars

Action to be taken by AMCs in cases where the Distributor is found to be Joint holder in multiple folios of unrelated 1st holder

- In cases where the MFD/EUIN is identified to be a Joint Holder in a folio, the AMC will contact the MFD for a written explanation regarding the addition of their name as the 2nd or 3rd holder in the folios. The MFD should be instructed to obtain a written confirmation from the 1st holder (using the provided specimen), unless the 1st holder is a relative, confirming whether the MFD's name was added with their knowledge and consent. This confirmation should be submitted to the respective RTAs.
- Until written confirmation from the 1st holder is obtained as described above, transactions such as redemptions, changes in bank mandates, and transmissions in these folios will be subject to enhanced due diligence. Additionally, commissions on such folios will be withheld until remediation is complete.
- Remediation must be done through written confirmation only, with the signature verified against the registered signature on the folio. Verbal or email confirmations are not acceptable.
- Actions will be taken against the MFD involved in such cases include withholding trail commission, possible de-empanelment, and reporting the matter to AMFI and SEBI with complete details.

AMFI has released a ready reckoner for MFDs, covering key regulations and offering useful links to various AMFI guidelines and best practices. [Click here](#)

Performance

Performance of the Scheme					as on February 28, 2025			
Quantum Long Term Equity Value Fund - Regular Plan - Growth Option					Current Value ₹10,000 Invested at the beginning of a given period			
Period	Scheme Returns (%)	Tier I - Benchmark [#] Returns (%)	Tier II - Benchmark ^{##} Returns (%)	Additional Benchmark Returns (%) ^{###}	Scheme Returns (₹)	Tier I - Benchmark [#] Returns (₹)	Tier II - Benchmark ^{##} Returns (₹)	Additional Benchmark Returns (₹) ^{###}
Since Inception (01st Apr 2017)	11.36%	13.54%	13.60%	13.47%	23,443	27,335	27,441	27,205
Feb 28, 2018 to Feb 28, 2025 (7 years)	11.53%	12.83%	13.04%	12.84%	21,480	23,290	23,595	23,305
Feb 28, 2020 to Feb 28, 2025 (5 years)	18.65%	17.90%	17.49%	15.22%	23,536	22,806	22,408	20,326
Feb 28, 2022 to Feb 28, 2025 (3 years)	16.20%	12.64%	12.42%	10.56%	15,697	14,295	14,211	13,519
Feb 29, 2024 to Feb 28, 2025 (1 year)	6.62%	-0.41%	0.62%	2.19%	10,662	9,959	10,062	10,219

#BSE 500 TRI, ##BSE 200 TRI, ###BSE Sensex TRI. **Past performance may or may not be sustained in the future.** Load is not taken into consideration in scheme returns calculation. Different Plans shall have a different expense structure. Returns are net of total expenses and are calculated on the basis of Compounded Annualized Growth Rate (CAGR). #with effect from December 01, 2021 Tier I benchmark has been updated as BSE 500 TRI. As TRI data is not available since inception of the scheme, benchmark performance is calculated using composite. CAGR BSE 500 index PRI Value from March 13, 2006 to July 31, 2006 and TRI Value since August 1, 2006. ##TRI data is not available since inception of the scheme, Tier II benchmark performance is calculated using composite CAGR BSE 200 index PRI Value from March 13, 2006 to July 31, 2006 and TRI Value since August 1, 2006. Regular Plan was launched on 1st April 2017. [Click here](#) for other schemes managed by George Thomas & Christy Mathai.

Performance of the Scheme					as on February 28, 2025			
Quantum ELSS Tax Saver Fund - Regular Plan - Growth Option					Current Value ₹10,000 Invested at the beginning of a given period			
Period	Scheme Returns (%)	Tier I - Benchmark [#] Returns (%)	Tier II - Benchmark ^{##} Returns (%)	Additional Benchmark Returns (%) ^{###}	Scheme Returns (₹)	Tier I - Benchmark [#] Returns (₹)	Tier II - Benchmark ^{##} Returns (₹)	Additional Benchmark Returns (₹) ^{###}
Since Inception (01st Apr 2017)	11.40%	13.54%	13.60%	13.47%	23,513	27,335	27,441	27,205
Feb 28, 2018 to Feb 28, 2025 (7 years)	11.55%	12.83%	13.04%	12.84%	21,505	23,290	23,595	23,305
Feb 28, 2020 to Feb 28, 2025 (5 years)	18.67%	17.90%	17.49%	15.22%	23,557	22,806	22,408	20,326
Feb 28, 2022 to Feb 28, 2025 (3 years)	16.15%	12.64%	12.42%	10.56%	15,677	14,295	14,211	13,519
Feb 29, 2024 to Feb 28, 2025 (1 year)	6.36%	-0.41%	0.62%	2.19%	10,636	9,959	10,062	10,219

#BSE 500 TRI, ##BSE 200 TRI, ###BSE Sensex TRI. **Past performance may or may not be sustained in the future.** Different Plans shall have a different expense structure. Returns are net of total expenses and are calculated on the basis of Compounded Annualized Growth Rate (CAGR). #with effect from February 01, 2020 benchmark has been changed from BSE Sensex TRI to BSE 200 TRI. Regular Plan was launched on 1st April 2017. [Click here](#) for other schemes managed by George Thomas & Christy Mathai.

Performance of the Scheme					as on February 28, 2025		
Quantum Equity Fund Of Funds - Regular Plan - Growth Option					Current Value ₹10,000 Invested at the beginning of a given period		
Period	Scheme Returns (%)	Tier I - Benchmark [#] Returns (%)	Tier II - Benchmark ^{##} Returns (%)	Scheme Returns (₹)	Tier I - Benchmark [#] Returns (₹)	Tier II - Benchmark ^{##} Returns (₹)	
Since Inception (01st Apr 2017)	11.65%	13.60%	13.47%	23,929	27,451	27,205	
February 28, 2018 to February 28, 2025 (7 years)	11.04%	13.04%	12.84%	20,822	23,595	23,305	
February 28, 2020 to February 28, 2025 (5 years)	15.33%	17.49%	15.22%	20,419	22,408	20,326	
February 28, 2022 to February 28, 2025 (3 years)	12.03%	12.42%	10.56%	14,063	14,211	13,519	
February 29, 2024 to February 28, 2025 (1 year)	4.06%	0.62%	2.19%	10,406	10,062	10,219	

#BSE 200 TRI, ##BSE Sensex TRI. **Past performance may or may not be sustained in the future.** Load is not taken into consideration in scheme returns calculation. Different Plans shall have a different expense structure. Returns are net of total expenses and are calculated on the basis of Compounded Annualized Growth Rate (CAGR). Regular Plan was launched on 1st April 2017. 5 year Returns of Regular Plan have been calculated considering the NAV of 1st April, 2017. Chirag Mehta manages 8 schemes of the Quantum Mutual Fund. [Click here](#) for other schemes managed by Mr. Chirag Mehta.

Performance

Performance of the Scheme				as on February 28, 2025		
Quantum ESG Best In Class Strategy Fund - Regular Plan - Growth Option		Current Value ₹10,000 Invested at the beginning of a given period				
Period	Scheme Returns (%)	Tier I - Benchmark [#] Returns (%)	Tier II - Benchmark ^{##} Returns (%)	Scheme Returns (₹)	Tier I - Benchmark [#] Returns (₹)	Tier II - Benchmark ^{##} Returns (₹)
Since Inception (12th Jul 2019)	14.27%	14.52%	13.28%	21,220	21,483	20,201
February 28, 2020 to February 28, 2025 (5 years)	16.01%	16.66%	15.22%	21,031	21,628	20,326
February 28, 2022 to February 28, 2025 (3 years)	9.97%	9.57%	10.56%	13,304	13,159	13,519
February 29, 2024 to February 28, 2025 (1 year)	0.00%	0.77%	2.19%	10,000	10,077	10,219

#NIFTY100 ESG TRI, ##BSE Sensex TRI. **Past performance may or may not be sustained in the future.** Load is not taken into consideration in Scheme returns calculation. Different Plans shall have a different expense structure. Returns are net of total expenses and are calculated on the basis of Compounded Annualized Growth Rate (CAGR). Since the scheme has not completed 5 years data will not be available. Note: Name of Quantum India ESG Equity Fund has been changed to Quantum ESG Best In Class Strategy Fund effective from 1st February, 2024. Chirag Mehta manages 8 schemes of the Quantum Mutual Fund. [Click here](#) for other schemes managed by Mr. Chirag Mehta.

Performance of the Scheme				as on February 28, 2025		
Quantum Liquid Fund - Regular Plan - Growth Option		Current Value ₹10,000 Invested at the beginning of a given period				
Period	Scheme Returns (%)	Tier I - Benchmark [#] Returns (%)	Tier II - Benchmark ^{##} Returns (%)	Scheme Returns (₹)	Tier I - Benchmark [#] Returns (₹)	Tier II - Benchmark ^{##} Returns (₹)
Since Inception (01st Apr 2017)	5.44%	5.90%	6.02%	15,211	15,743	15,887
February 28, 2018 to February 28, 2025 (7 years)**	5.37%	5.82%	6.08%	14,430	14,863	15,123
February 29, 2020 to February 28, 2025 (5 years)**	5.05%	5.48%	5.63%	12,797	13,056	13,149
February 28, 2022 to February 28, 2025 (3 years)**	6.30%	6.65%	6.35%	12,013	12,131	12,029
February 29, 2024 to February 28, 2025 (1 year)**	6.93%	7.22%	7.50%	10,693	10,722	10,750
January 31, 2025 to February 28, 2025 (1 month)*	6.59%	6.99%	7.06%	10,051	10,054	10,054
February 13, 2025 to February 28, 2025 (15 days)*	6.32%	6.68%	6.57%	10,026	10,027	10,027
February 21, 2025 to February 28, 2025 (7 days)*	6.14%	6.70%	7.48%	10,012	10,013	10,014

#CRISIL Liquid Debt A-I Index; ## CRISIL 1 year T-bill Index. **Past performance may or may not be sustained in the future.** Different Plans shall have a different expense structure. *Simple Annualized. **Returns for 1 year and above period are calculated on the basis of Compounded Annualized Growth Rate (CAGR). Returns are net of total expenses. Pankaj Pathak manages 3 schemes of the Quantum Mutual Fund. [Click here](#) for other schemes managed by Mr. Pankaj Pathak.

Performance of the Scheme				as on February 28, 2025		
Quantum Dynamic Bond Fund - Regular Plan - Growth Option		Current Value ₹10,000 Invested at the beginning of a given period				
Period	Scheme Returns (%)	Tier I - Benchmark [#] Returns (%)	Tier II - Benchmark ^{##} Returns (%)	Scheme Returns (₹)	Tier I - Benchmark [#] Returns (₹)	Tier II - Benchmark ^{##} Returns (₹)
Since Inception (01st Apr 2017)	6.75%	7.01%	5.71%	16,772	17,104	15,523
February 28, 2018 to February 28, 2025 (7 years)	7.10%	7.61%	6.97%	16,174	16,716	16,036
February 28, 2020 to February 28, 2025 (5 years)	6.09%	6.37%	5.41%	13,446	13,625	13,015
February 28, 2022 to February 28, 2025 (3 years)	6.82%	6.18%	6.76%	12,190	11,975	12,172
February 29, 2024 to February 28, 2025 (1 year)	6.90%	7.69%	9.06%	10,690	10,769	10,906

#CRISIL Dynamic Bond A-III Index, ##CRISIL 10 Year Gilt Index. **Past performance may or may not be sustained in the future.** Different Plans shall have a different expense structure. Returns are net of total expenses and are calculated on the basis of Compounded Annualized Growth Rate (CAGR). Pankaj Pathak manages 3 schemes of the Quantum Mutual Fund. [Click here](#) for other schemes managed by Mr. Pankaj Pathak.

Performance

Performance of the Scheme				as on February 28, 2025		
Quantum Gold Savings Fund - Regular Plan - Growth Option			Current Value ₹10,000 Invested at the beginning of a given period			
Period	Scheme Returns (%)	Tier I - Benchmark [#] Returns (%)	Tier II - Benchmark ^{##} Returns (%)	Scheme Returns (₹)	Tier I - Benchmark [#] Returns (₹)	Tier II - Benchmark ^{##} Returns (₹)
Since Inception (01st Apr 2017)	13.17%	14.54%	5.71%	26,634	29,289	15,523
February 28, 2018 to February 28, 2025 (7 years)	14.61%	15.76%	6.97%	25,996	27,873	16,036
February 28, 2020 to February 28, 2025 (5 years)	13.44%	14.74%	5.41%	18,799	19,899	13,015
February 28, 2022 to February 28, 2025 (3 years)	17.55%	18.47%	6.76%	16,249	16,635	12,172
February 29, 2024 to February 28, 2025 (1 year)	34.50%	36.54%	9.06%	13,450	13,654	10,906

#Domestic Price of Physical Gold, ##CRISIL 10 Year Gilt Index. **Past performance may or may not be sustained in the future.** Different Plans shall have a different expense structure. Returns are net of total expenses and are calculated on the basis of Compounded Annualized Growth Rate (CAGR). Chirag Mehta manages 8 schemes of the Quantum Mutual Fund. [Click here](#) for other schemes managed by Mr. Chirag Mehta.

Performance of the Scheme				as on February 28, 2025		
Quantum Multi Asset Fund of Funds - Growth Option			Current Value ₹10,000 Invested at the beginning of a given period			
Period	Scheme Returns (%)	Tier I - Benchmark [#] Returns (%)	Tier II - Benchmark ^{##} Returns (%)	Scheme Returns (₹)	Tier I - Benchmark [#] Returns (₹)	Tier II - Benchmark ^{##} Returns (₹)
Since Inception (01st Apr 2017)	8.78%	10.75%	13.47%	19,465	22,437	27,205
February 28, 2018 to February 28, 2025 (7 years)	8.97%	10.85%	12.84%	18,255	20,578	23,305
February 28, 2020 to February 28, 2025 (5 years)	10.39%	11.72%	15.22%	16,402	17,417	20,326
February 28, 2022 to February 28, 2025 (3 years)	10.23%	10.29%	10.56%	13,397	13,420	13,519
February 29, 2024 to February 28, 2025 (1 year)	9.20%	9.41%	2.19%	10,920	10,940	10,219

Past performance may or may not be sustained in the future. Load is not taken into consideration in scheme returns calculation. Different Plans shall have a different expense structure. Returns are net of total expenses and are calculated on the basis of Compounded Annualized Growth Rate (CAGR). #CRISIL Dynamic Bond A-III Index (20%) + CRISIL Liquid Debt A-I Index (25%) + Nifty 50 TRI (40%) + Domestic price of Gold (15%). w.e.f. April 3, 2023, benchmark of the scheme has been changed. It is a customized index and it is rebalanced daily. ##BSE Sensex TRI. Chirag Mehta manages 8 schemes of the Quantum Mutual Fund. [Click here](#) for other schemes managed by Mr. Chirag Mehta.

Performance of the Scheme				as on February 28, 2025		
Quantum Nifty 50 ETF Fund of Fund - Growth Option			Current Value ₹10,000 Invested at the beginning of a given period			
Period	Scheme Returns (%)	Tier I - Benchmark [#] Returns (%)	Tier II - Benchmark ^{##} Returns (%)	Scheme Returns (₹)	Tier I - Benchmark [#] Returns (₹)	Tier II - Benchmark ^{##} Returns (₹)
Since Inception (05th Aug 2022)	10.62%	10.99%	10.48%	12,962	13,076	12,920
February 29, 2024 to February 28, 2025 (1 year)	1.61%	1.89%	2.19%	10,161	10,189	10,219

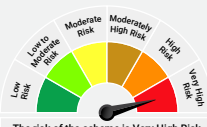
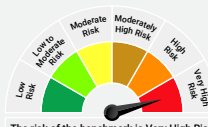

#Nifty 50 TRI ##BSE Sensex TRI. Since the scheme has not completed 3 years data will not be available. **Past performance may or may not be sustained in the future.** Load is not taken into consideration in Scheme returns calculation. Hitendra Parekh manages 2 schemes of the Quantum Mutual Fund. [Click here](#) for other schemes managed by Mr. Hitendra Parekh.

Performance & Product Label

Performance of the Scheme				as on February 28, 2025		
Quantum Small Cap Fund - Growth Option		Current Value ₹10,000 Invested at the beginning of a given period				
Period	Scheme Returns (%)	Tier I - Benchmark [#] Returns (%)	Tier II - Benchmark ^{##} Returns (%)	Scheme Returns (₹)	Tier I - Benchmark [#] Returns (₹)	Tier II - Benchmark ^{##} Returns (₹)
Since Inception (03rd Nov 2023)	3.46%	9.31%	11.36%	10,460	11,251	11,531
February 29, 2024 to February 28, 2025 (1 year)	-1.78%	-6.91%	2.19%	9,822	9,309	10,219

#BSE 250 Small Cap TRI; ## BSE Sensex TRI. Past performance may or may not be sustained in the future. Load is not taken into consideration in scheme returns calculation. Different Plans shall have a different expense structure. Returns are net of total expenses and are calculated on the basis of Compounded Annualized Growth Rate (CAGR). Note: Chirag Mehta manages 8 schemes & Pankaj Pathak manages 3 schemes of the Quantum Mutual Fund. [Click here](#) for other schemes managed by Chirag Mehta & Pankaj Pathak.

The Performance of Quantum Multi Asset Allocation Fund will be disclosed on completion of 1 year since its inception in terms of SEBI Master Circular No. SEBI/HO/IMD/IMD-PoD-1/P/CIR/2024/90 dated June 27, 2024

Product Label			
Name of the Scheme & Benchmarks	This product is suitable for investors who are seeking*	Risk-o-meter of Scheme	Risk-o-meter of Tier I & Tier II Benchmark
Quantum Long Term Equity Value Fund (An Open Ended Equity Scheme following a Value Investment Strategy) Tier I Benchmark: BSE 500 TRI Tier II Benchmark: BSE 200 TRI	<ul style="list-style-type: none"> Long term capital appreciation Invests primarily in equity and equity related securities of companies in BSE 200 index 	 <p>The risk of the scheme is Very High Risk</p>	 <p>The risk of the benchmark is Very High Risk</p>
Quantum ELSS Tax Saver Fund (An Open Ended Equity Linked Saving Scheme with a Statutory Lock in of 3 years and Tax Benefit) Tier I Benchmark: BSE 500 TRI Tier II Benchmark: BSE 200 TRI	<ul style="list-style-type: none"> Long term capital appreciation Invests primarily in equity and equity related securities of companies in BSE 200 index and to save tax u/s 80 C of the Income Tax Act. Investments in this product are subject to lock in period of 3 years 	 <p>The risk of the scheme is Very High Risk</p>	 <p>The risk of the benchmark is Very High Risk</p>

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

Product Label			
Name of the Scheme & Benchmark	This product is suitable for investors who are seeking*	Risk-o-meter of Scheme	Risk-o-meter of Tier I Benchmark
Quantum Equity Fund of Funds (An Open Ended Fund of Funds scheme Investing in Open Ended Diversified Equity Schemes of Mutual Funds) Tier I Benchmark : BSE 200 TRI	<ul style="list-style-type: none"> Long term capital appreciation Investments in portfolio of open-ended diversified equity schemes of mutual funds registered with SEBI whose underlying investments are in equity and equity related securities of diversified companies 	 <p>The risk of the scheme is Very High Risk</p>	 <p>The risk of the benchmark is Very High Risk</p>









*Investors should consult their financial advisers if in doubt about whether the product is suitable for them. Investors may please note that they will be bearing the recurring expenses of this Scheme in addition to the expenses of the underlying Schemes.

Product Label

Product Label			
Name of the Scheme & Benchmark	This product is suitable for investors who are seeking*	Risk-o-meter of Scheme	Risk-o-meter of Tier I Benchmark
<p>Quantum ESG Best In Class Strategy Fund</p> <p>(An Open-ended equity scheme investing in companies following Environment, Social and Governance (ESG) theme assessed through a Best In Class Strategy)</p> <p>Tier I Benchmark : NIFTY100 ESG TRI</p>	<ul style="list-style-type: none"> Long term capital appreciation Invests in shares of companies following Environment, Social and Governance (ESG) theme assessed through a Best In Class Strategy 	<p>The risk of the scheme is Very High Risk</p>	<p>The risk of the benchmark is Very High Risk</p>
<p>Quantum Gold Savings Fund</p> <p>(An Open Ended Fund of Fund Scheme Investing in Quantum Gold Fund)</p> <p>Tier I Benchmark : Domestic Price of Physical Gold</p>	<ul style="list-style-type: none"> Long term returns Investments in units of Quantum Gold Fund – Exchange Traded Fund whose underlying investments are in physical gold 	<p>The risk of the scheme is High Risk</p>	<p>The risk of the benchmark is High Risk</p>
<p>Quantum Multi Asset Fund of Funds</p> <p>(An Open Ended Fund of Funds Scheme Investing in schemes of Quantum Mutual Fund)</p> <p>Tier I Benchmark : CRISIL Dynamic Bond A-III Index (20%) + CRISIL Liquid Debt A-I Index (25%) + Nifty 50 TRI (40%) + Domestic price of Gold (15%)</p>	<ul style="list-style-type: none"> Long term capital appreciation and current income Investments in portfolio of schemes of Quantum Mutual Fund whose underlying investments are in equity , debt / money market instruments and gold 	<p>The risk of the scheme is Moderately High Risk</p>	<p>The risk of the benchmark is Moderately High Risk</p>
<p>Quantum Nifty 50 ETF Fund of Fund</p> <p>(An Open-ended fund of fund investing in units of Quantum Nifty 50 ETF)</p> <p>Tier I Benchmark : Nifty 50 TRI</p>	<ul style="list-style-type: none"> Long term capital appreciation Investments in units of Quantum Nifty 50 ETF – Exchange Traded Fund 	<p>The risk of the scheme is Very High Risk</p>	<p>The risk of the benchmark is Very High Risk</p>
<p>Quantum Gold Fund</p> <p>(An Open Ended Scheme Replicating / Tracking Gold)</p> <p>Tier I Benchmark : Domestic Price of physical gold</p>	<ul style="list-style-type: none"> Long term capital appreciation Investments in units of Quantum Nifty 50 ETF – Exchange Traded Fund 	<p>The risk of the scheme is High Risk</p>	<p>The risk of the benchmark is High Risk</p>


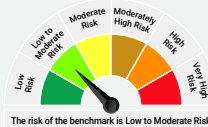
*Investors should consult their financial advisers if in doubt about whether the product is suitable for them. Investors may please note that they will be bearing the recurring expenses of this Scheme in addition to the expenses of the underlying Schemes.

Product Label

Product Label			
Name of the Scheme & Benchmark	This product is suitable for investors who are seeking*	Risk-o-meter of Scheme	Risk-o-meter of Tier I Benchmark
<p>Quantum Nifty 50 ETF</p> <p>(An Open Ended Scheme Replicating / Tracking Nifty 50 Index)</p> <p>Tier I Benchmark : Nifty 50 TRI</p>	<ul style="list-style-type: none"> Long term capital appreciation Invests in shares of companies following Environment, Social and Governance (ESG) theme assessed through a Best In Class Strategy 	 <p>The risk of the scheme is Very High Risk</p>	 <p>The risk of the benchmark is Very High Risk</p>
<p>Quantum Small Cap Fund</p> <p>(An Open Ended-Equity Scheme Predominantly Investing in Small Cap Stocks)</p> <p>Tier I Benchmark: BSE 250 SmallCap TRI</p>	<ul style="list-style-type: none"> Long term capital appreciation Investment in Small Cap Stock 	 <p>The risk of the scheme is Very High Risk</p>	 <p>The risk of the benchmark is Very High Risk</p>
<p>Quantum Multi Asset Allocation Fund</p> <p>(An Open-Ended Scheme Investing in Equity & Equity Related Instruments, Debt & Money Market Instruments and Gold Related Instruments)</p> <p>Tier I Benchmark: NIFTY 50 TRI (40%) + CRISIL Short Term Bond Fund All Index (45%) + Domestic Price of Gold (15%)</p>	<ul style="list-style-type: none"> Long term capital appreciation and current income Investment in a Diversified Portfolio of Equity & Equity Related Instruments, Debt & Money Market Instruments and Gold Related Instruments 	 <p>The risk of the scheme is High Risk</p>	 <p>The risk of the benchmark is Moderately High Risk</p>
<p>Quantum Ethical Fund</p> <p>(An Open-Ended Equity Scheme following an Ethical Theme)</p> <p>Tier I Benchmark : NIFTY 500 Shariah TRI</p>	<ul style="list-style-type: none"> Long term capital appreciation Investments in Equity & Equity Related Instruments of companies following an Ethical Set of Principles 	 <p>The risk of the scheme is Very High Risk</p>	 <p>The risk of the benchmark is Very High Risk</p>



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

Product Label

Product Label			
Name of the Scheme & Benchmark	This product is suitable for investors who are seeking*	Risk-o-meter of Scheme	Risk-o-meter of Tier I Benchmark
<p>Quantum Liquid Fund</p> <p>(An Open-ended Liquid Scheme. A relatively low interest rate risk and relatively low credit risk.)</p> <p>Tier I Benchmark : CRISIL Liquid Debt A-I Index</p>	<ul style="list-style-type: none"> Income over the short term Investments in debt / money market instruments 	 <p>The risk of the scheme is Low Risk</p>	 <p>The risk of the benchmark is Low to Moderate Risk</p>

PRC Matrix – Quantum Liquid Fund

Credit Risk →	Relatively Low (Class A)	Moderate (Class B)	Relatively High (Class C)
Interest Rate Risk ↓			
Relatively Low (Class I)	A-I		
Moderate (Class II)			
Relatively High (Class III)			

Name of the Scheme & Benchmark	This product is suitable for investors who are seeking*	Risk-o-meter of Scheme	Risk-o-meter of Tier I Benchmark
<p>Quantum Dynamic Bond Fund</p> <p>(An Open-ended Dynamic Debt Scheme Investing Across Duration. A relatively high interest rate risk and relatively low credit risk.)</p> <p>Tier I Benchmark : CRISIL Dynamic Bond A-III Index</p>	<ul style="list-style-type: none"> Regular income over short to medium term and capital appreciation Investment in Debt / Money Market Instruments / Government Securities 	 <p>The risk of the scheme is Moderate Risk</p>	 <p>The risk of the benchmark is Moderate Risk</p>

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

PRC Matrix – Quantum Dynamic Bond Fund

Credit Risk →	Relatively Low (Class A)	Moderate (Class B)	Relatively High (Class C)
Interest Rate Risk ↓			
Relatively Low (Class I)			
Moderate (Class II)			
Relatively High (Class III)	A-III		


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Mutual Fund investments are subject to market risks,
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