

NFO
Period

02nd to 16th
Dec 2024



#EthicsinEquities

The Journey is as Important as the Destination



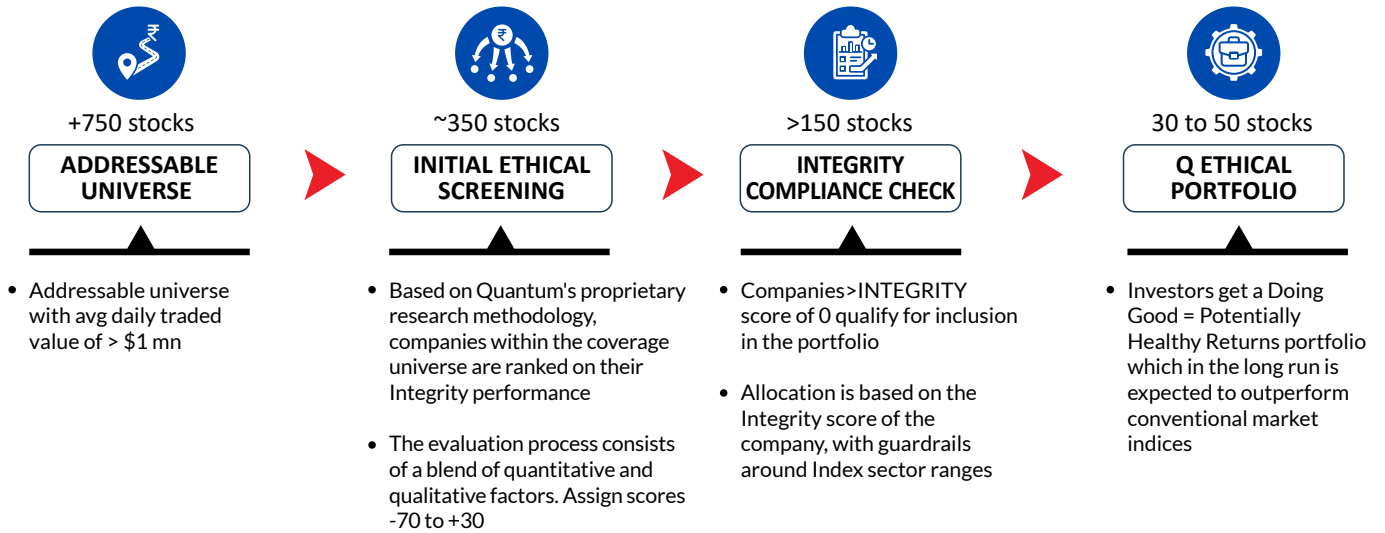
Quantum Ethical Fund

(An open-ended equity scheme following an Ethical Theme)

The Quantum Ethical Fund is an open ended Equity Fund that invests in companies meeting an Ethical Set of Principles with the objective of achieving long-term capital appreciation. Our proprietary screening framework ensures that every portfolio investment stands high on Ethical & Integrity parameters. With Quantum Ethical Fund, you can invest responsibly, where moral principles and prosperity work together for a brighter future.

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

Investment Approach



The number of Stock in trading volume criteria, integrity criteria and in portfolio will be changed from time to time based on Investment Strategy of the scheme. Ethical = Form part of the ethical frameworks Shariah Compliant Universe, Jainism and such other Ethical principles. Please refer Scheme Information Document of the Scheme for complete Investment Strategy.

Fund Manager

Quantum Ethical Fund

Quantum Small Cap Fund

Quantum Equity Fund of Funds

Quantum ESG Best In Class Strategy Fund

Quantum Gold Savings Fund

Quantum Gold Fund

Quantum Multi Asset Fund of Funds

Quantum Multi Asset Allocation Fund



Chirag Mehta
CIO & Fund Manager

Fund Features



Investment Objective

The Investment Objective of the scheme is to achieve long-term capital appreciation by investing in Equity & Equity Related Instruments of companies following an Ethical Set of Principles. There is no assurance that the investment objective of the scheme will be achieved.



Benchmark

Tier 1: NIFTY 500 Shariah Total Return Index (TRI)



Type of Scheme

An open-ended equity scheme following an Ethical Theme.



Plans Available

Direct Plan and Regular Plan with Growth option in both Plans.



Minimum Application Amount

Lumpsum - 500
SIP - 100 (Daily) & 500 (Weekly, Fortnightly, Monthly & Quarterly)

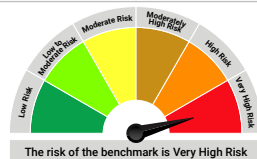
This product is suitable for investors who are seeking*

- Long term capital appreciation
- Investments in Equity & Equity Related Instruments of companies following an Ethical Set of Principles

Scheme Riskometer#



Benchmark Riskometer (Tier I) - NIFTY 500 Shariah TRI



*Investors should consult their financial advisers if in doubt about whether the product is suitable for them. #The product labeling assigned during the NFO is based on internal assessment of the scheme characteristics or model portfolio and the same may vary post NFO when the actual investments are made. The same shall be updated on ongoing basis in accordance with clause 17.4 of the SEBI Master Circular on Mutual Funds dated June 27, 2024.

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