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Geojit's PMS arm launches BEACON Fund

A Flexi cap portfolio that offers stability and growth potential

Mumbai, 20 August 2024: Geojit Financial Services Ltd., a leading investment services company and a trusted Portfolio Management Services provider for over 20 years, announced the launch of its Flexi cap portfolio, the BEACON Fund, designed to guide investors through the complex waters of the Indian equity markets.

As a Flexi cap portfolio, BEACON offers a unique blend of stability and growth potential by investing across all market capitalizations and thus will help in wealth creation for the investors.

Key Highlights of the BEACON Fund:

- **Comprehensive Market Cap Exposure:** The BEACON Fund is engineered to provide investors with seamless exposure to companies of all sizes, from large-cap stalwarts to promising mid-cap and small-cap growth stories. This approach ensures a balanced portfolio that captures the full breadth of market opportunities.
- **High-Quality Growth Portfolio:** The fund is meticulously constructed with a focus on high-quality growth companies, carefully selected based on rigorous research and analysis. This emphasis on quality ensures that the portfolio is resilient, with a strong potential for consistent growth over the long term.
- **Strategic Flexibility:** In an ever-evolving economic landscape, the BEACON Fund stands out for its ability to pivot and adapt its portfolio strategy to align with current market cycles. This flexibility allows for proactive adjustments, ensuring the fund remains well-positioned to capitalize on emerging trends and navigate potential risks.
- **Superior Risk-Adjusted Returns:** At the heart of the BEACON Fund's strategy is a commitment to delivering superior risk-adjusted returns. By blending comprehensive market exposure with a focus on quality and strategic adaptability, the fund aims to generate returns that outperform the broader market while carefully managing risk.

On the fund launch, **Gopinath Natarajan, CEO – Portfolio & Managed Assets** said, "In our constant endeavour to bring out strategies that are not only relevant to the investors today but also stand the test of time, we are excited to bring to investors the BEACON Fund.

This fund aims to provide a reliable and resilient investment vehicle, maximizing market opportunities, by adapting to shifting economic landscapes. The BEACON

Fund has been constructed to be a core investment for the long-term growth investor, integrating a very sharp-eyed view of risk management”.

Pawan Parakh, Fund Manager - Portfolio & Managed Assets, pointed out, “BEACON marries large-cap stability with the growth potential of small and mid-caps with an objective of delivering consistent and superior risk adjusted returns over the long term.”

The BEACON Fund will be managed by Pawan Parakh. He has 18 years of experience in Fund Management and Institutional equity research. During this period, Parakh had an impressive professional journey, with key roles in several financial institutions including Edelweiss, HDFC, HSBC, and Deloitte. As a seasoned fund manager, Pawan has successfully managed large PMS schemes, consistently generating sustainable wealth for investors.

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ABOUT GEOJIT

Geojit Financial Services (www.geojit.com) is one of the leading investment services companies in India, with a strong presence in the GCC. It has around 14.12 lakh clients, a network of 500 offices and has Assets Under Custody and Management worth of Rs. 1,03,350 crore. BNP Paribas, C J George – Founder, Chairman and Managing Director of Geojit, Kerala State Industrial Development Corporation (KSIDC) and Rekha Rakesh Jhunjhunwala are the prominent shareholders of the company.

Geojit Financial Services has an extensive presence in the GCC region via joint ventures and partnerships: Barjeel Geojit Financial Services LLC in UAE, BBK Geojit Business Consultancy and Information (KSCC) in Kuwait and QBG Geojit Securities LLC in Oman. The company also has presence in Bahrain through a business partnership with Bank of Bahrain and Kuwait.

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