

TRUST Group announces launch of TRUST Mutual Fund. Appoints CRISIL as a Knowledge Partner

Sandeep Bagla appointed as CEO of TRUST Mutual Fund

Mumbai, December 10, 2020: TRUST Group, one of India's leading full-service financial houses, today announced its foray into the mutual funds segment with the launch of TRUST Mutual Fund. The AMC has appointed Sandeep Bagla as its Chief Executive Officer (CEO).

TRUST AMC will follow a structured investment approach along with a unique "LimitedActiv" methodology, with the goal of providing investors consistent risk adjusted returns with low volatility. The robust methodology has been developed in collaboration with CRISIL for the initial fixed income schemes which will assist the fund management team in:

- Defining a **high-quality investible universe** of Issuers
- Creation of a **Model Portfolio**, with broad-based **weights on Outstanding amounts**
- Portfolio Construction using Model Portfolio as the **Guiding framework**
- Portfolio optimization with **"LimitedActiv" methodology** (within predefined, back tested variance limits)
- **Periodic review by CRISIL** of universe, portfolio and performance



Utpal Sheth, Associate Director at TRUST AMC said, *"Most investors concentrate either on Alpha generation or on tracking Beta for their investments. At TRUST Mutual Fund, we want to focus on **Consistency**, deploying our unique investment methodology. Our aim is to create investment products that are differentiated, well-researched and comprise high quality assets. We are privileged to have CRISIL as a value-adding knowledge partner."*



Sandeep Bagla, CEO of TRUST AMC said, *"Our aim is to become a trusted asset manager by following a disciplined process. We are committed to offering innovative products backed by a process-driven investment approach and service excellence."*

Mr. Nagarajan Narasimhan, Senior Director, CRISIL Research, said, *"CRISIL believes this is a key milestone for the Indian asset management industry. We are pleased to be associated with Trust AMC as a knowledge partner and support its pioneering initiative of creating a product with an independent research house. We believe our rich data, experience and expertise in the domain of fixed-income research, valuations and indices over the past two decades will help create relevant products for Trust AMC"*

About TRUST Mutual Fund:

For more information please log on to: www.trustmf.com

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Trust Mutual Fund has been established as a Trust under the Indian Trusts Act, 1882, sponsored by Trust Investment Advisors Private Limited (liability restricted to Rs 1 lakh). Trustee: Trust AMC Trustee Private Limited: Investment Manager: Trust Asset Management Private Limited (the AMC). Trust Mutual Fund has been recently launched and TRUST AMC does not have any previous experience in investment management activity in the mutual fund segment. The AMC has not yet released any scheme launch related documents.

The AMC (including its affiliates), the Mutual Fund, the trust and any of its officers, directors, personnel and employees, shall not liable for any loss, damage of any nature, including but not limited to direct, indirect, loss in any way arising from the use of this material in any manner. The information contained herein should not be construed as a forecast or promise nor should it be considered as an investment advice.

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

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