Quantum MUTUAL FUND
FOR THOUGHTFUL INVESTORS

#Capture_TheShift

Profit Pool__*shifts*
Flexibility captures it.#

Quantum Flexi Cap Fund

(An open ended dynamic equity scheme investing across large cap, mid cap, small cap stocks)

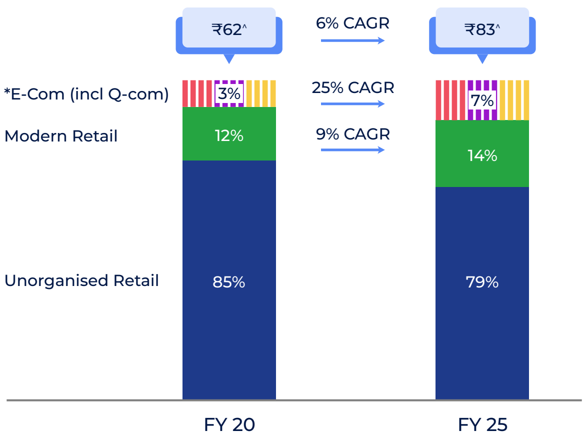
NFO Opens: Aug 21, 2026
Closes: Sep 04, 2026

A unique process to identify growth opportunities at reasonable price

Capturing Shift in Profit Pool Strategy can offer an investment opportunity

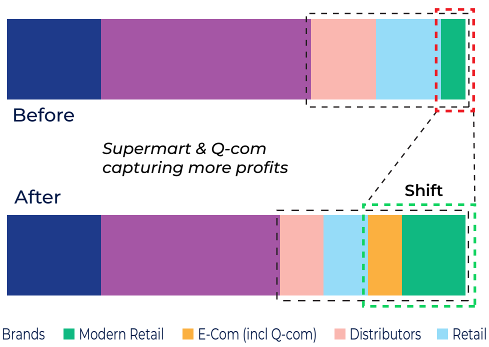
- Profit pool (i.e. total profits earned by an industry) never stays static.
- Disruption, Consolidation, Consumer Preferences or Regulations can cause shifts in profit pool from one segment to another.
- Companies that benefit from this shift can see higher growth, higher multiples and hence, higher returns.

Disruption - "India Retail Industry"



Source: Red Seer Report 2026
*^Lakh Crs *E-com is E-commerce & Q-com is Quick commerce*

Shift in Profit Pool

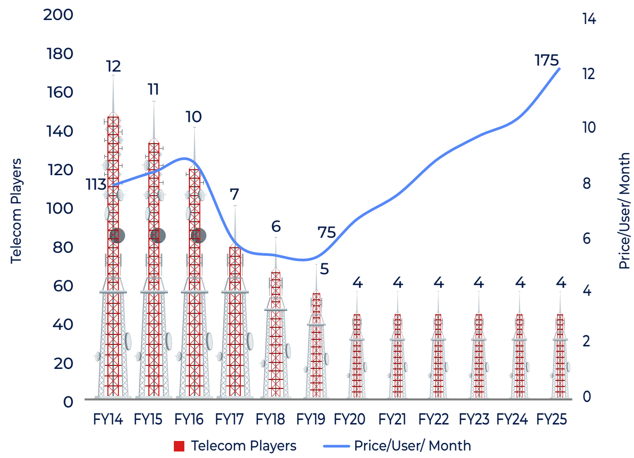


The above chart depicts the profit pool shifts in the Indian Retail Industry and is for explanation purpose.

Key Takeaways

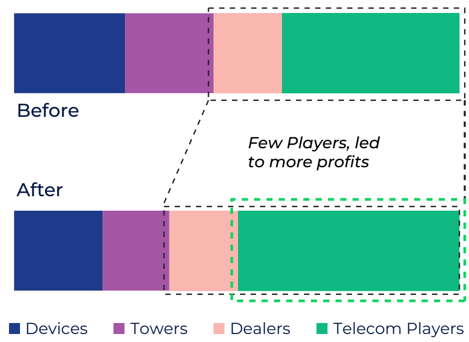
- Convenience, technology and digital adoption transformed how consumers shop.
- New formats disrupted the industry and consumer spending shifted towards them.
- As a result, the industry's profit pool migrated to new entrants.

Consolidation - "India Telecom Industry"



Source: TRAI

Shift in Profit Pool



The above chart depicts the profit pool shifts in the Indian Telecom industry and is for explanation purpose.

Key Takeaways

- Many telecom companies competed aggressively, leading to lower prices and hence weaker profitability.
- Over time, weaker players exited or merged, reducing the number of operators.
- With fewer players, Average price per user improved, profitability increased, and the profit pool shifted to the survivors.

#An investment strategy to identify stocks and apply GARP investment approach. Please refer Scheme Information Document (SID) for complete investment strategy.

What is GARP Strategy *(Growth at Reasonable Price)*

- Focus on sustainability of growth.
- Enters near inflection point to ensure better risk reward.
- Bottom-up selection based on earning quality and good governance.
- Exits when valuation reflect over-optimism.

Why Quantum Flexi Cap Fund?

- Aims to capture shifts in profit pool across value chain of industries.
- Flexible to tap opportunities across market caps.
- Backed by research experience across major sectors and market cycles since 2006
- Combines a GARP philosophy with rigorous bottom-up stock selection.

Fund Managers

Mr. Chirag Mehta
CIO & Fund Manager

Work experience
24 years

Mr. Ketan Gujarathi
Associate Fund Manager

Work experience
14 years

Fund Facts

Investment Objective

The investment objective of the scheme is to achieve long-term capital appreciation by investing in a diversified portfolio of large, mid and small cap companies. There is no assurance that the investment objective of the scheme will be achieved.

Benchmark

BSE 500 TRI

Plans/Option Available

Direct Plan and Regular Plan with Growth Option

Minimum Application Amount

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

Product Label

This product is suitable for investors who are seeking*	Scheme Risk-o-meter
• Long Term Capital Appreciation • Investments predominantly in Equity & Equity Related Instruments	

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

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