

# Plutus Long Short Strategy

A strategy to generate absolute returns based on fundamental analysis

April 2023



Inception Date	Minimum Investment	Benchmark	Fees	Exit Option
1st October 2021	As per NAV of model portfolio, currently ~ 1.18 Crores.	Nifty 200 TRI	Up-to 2.00% p.a.	Monthly exit option available upon communication from the client before the 22nd day of every month. Funds will be redeemed post expiry of F&O trades for the month (Last Thursday of every month)

## Overview

The Plutus Long short strategy aims to generate returns for the client by taking active views on stocks based on fundamental analysis. The strategy is sector agnostic but will seek appropriate diversification to limit idiosyncratic risk through a portfolio construct that contains a broad minimum number of securities that represent a cross sectional sectoral view of the Indian equity market.

No leverage is entailed and the strategy does not carry any "open risk". Positions will be taken against either available cash and/or stock as margin. The same shall be sufficient to offset any loss on a derivative position.

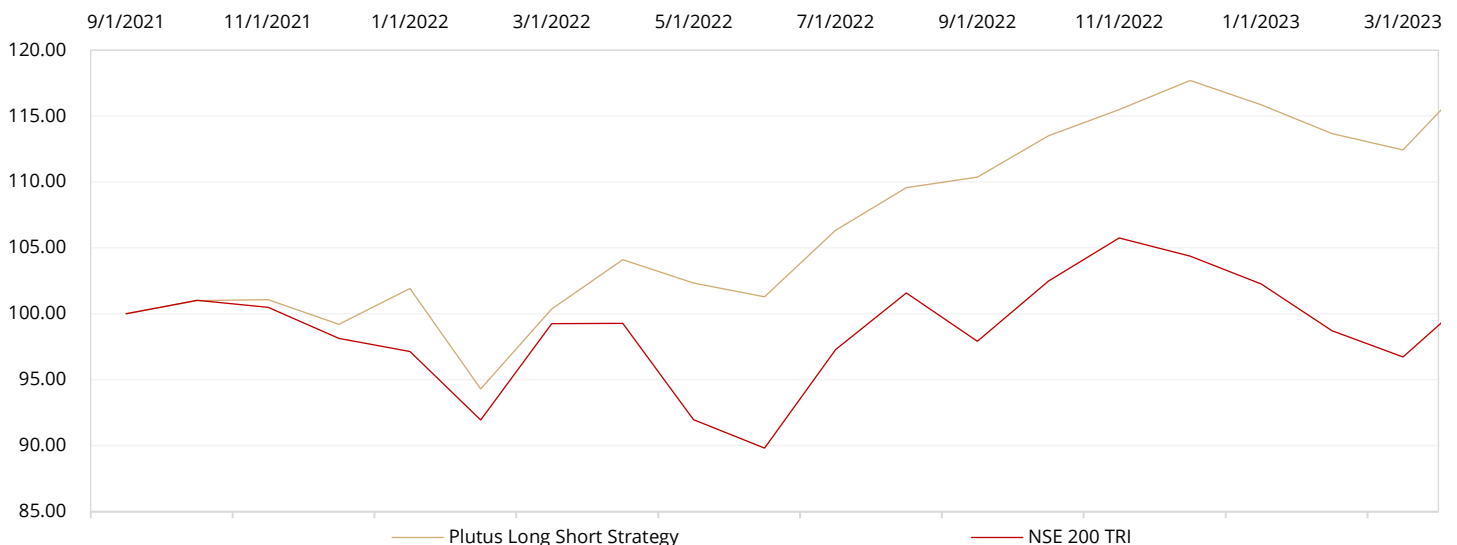
## Investment Objective

To seek capital appreciation through long and/or short positions in equities and Indices.

## Advantages

- Can help diversify a portfolio that is long only equities.
- Can help generate alpha over Index returns.

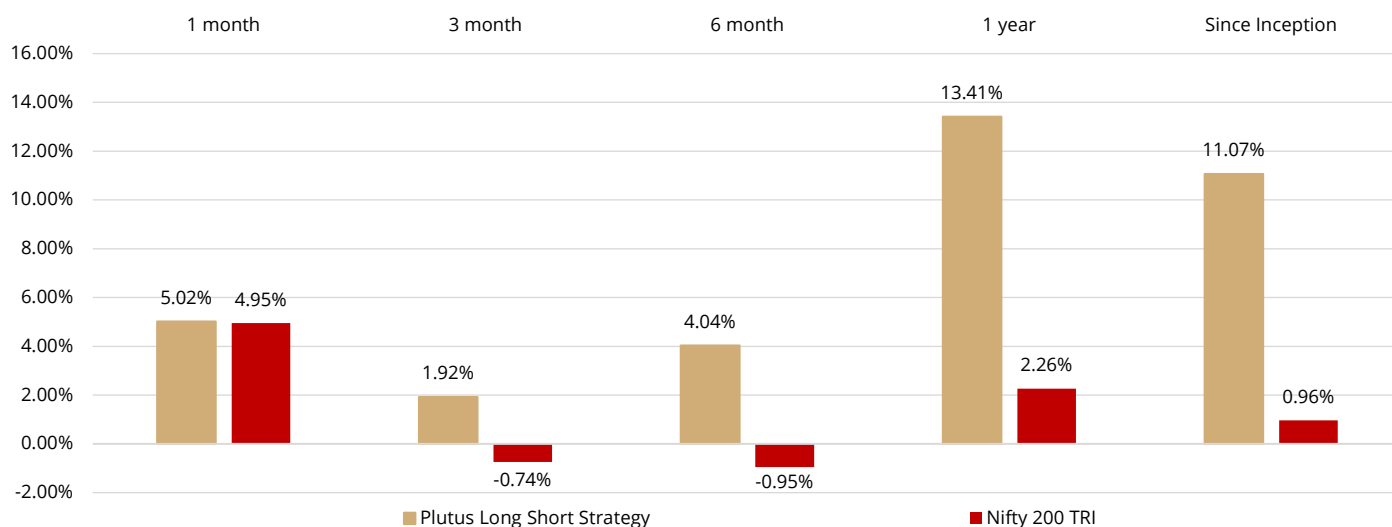
## Performance Comparison (since Inception)



## Monthly Strategy Returns

Year	January	February	March	April	May	June	July	August	September	October	November	December	Total Returns
2021										1.02%	0.05%	-1.85%	<b>-0.78%</b>
2022	2.75%	-7.47%	6.44%	3.72%	-1.71%	-1.02%	4.99%	3.03%	0.74%	2.83%	1.76%	1.90%	<b>17.96%</b>
2023	-1.57%	-1.89%	-1.08%	5.02%									<b>0.48%</b>

### Performance Comparison – 27<sup>th</sup> April 2023



Returns are computed based on the closing values of the last Thursday of the month. The above returns are for the model portfolio and may vary from client to client

The above returns are absolute and are gross of expenses and taxes; Past performance is not an indicator of future returns

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