

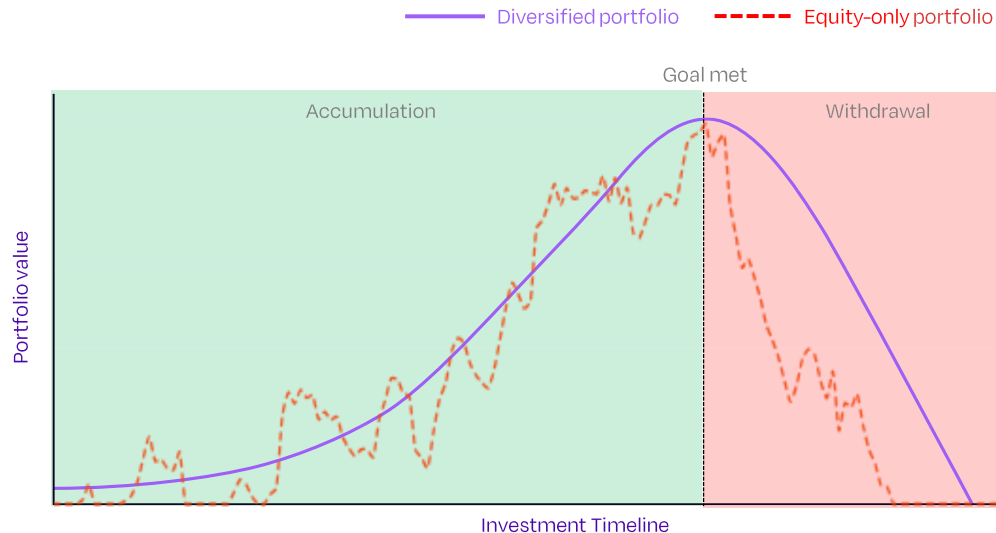
Capitalmind Multi Asset Allocation Fund

An open-ended scheme investing in equity and equity related instruments, debt and money market instruments, Commodities including Exchange Traded Commodity Derivatives

Commodities beyond Gold & Silver - because different commodities move for different reasons

The World Keeps Changing. Your Goals Shouldn't.

1 Diversification handles market cycles

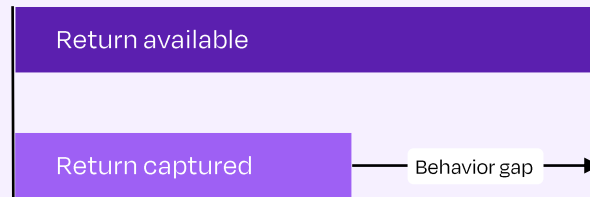


In an Equity-only portfolio:

- Highs tempt you to buy more when markets feel unstoppable
- Lows push you to sell at the worst times

Even the best single-asset portfolios can test your nerves during bad times.
Diversification spreads the risk, helping you stay on track.

2 Discipline ensures right behavior



This behavior gap comes from



Fear during declines, greed during rallies override plans



Recent performance feels like future outcomes certainty



Constant headlines, market chatter, and social media amplify anxiety and FOMO

Assets behave differently in different economic scenarios, making Diversification a long-term investment strategy

Macroeconomic Scenarios	Description	 Equities	Commodities			 Fixed Income
			 Precious Metals	 Base Metals	 Oil & Gas	
Demand boom /overheating	Growth ▲, Inflation ▲, Real yields ▲ Policy: tightening	▲	▲	▲▲	▲▲	▼
Disinflationary expansion	Growth ▲, Inflation ▼, Real yields ▼ Policy: neutral / easing	▲▲	▼	▲	▲	▲
Supply shock stagflation	Growth ▼, Inflation ▲, Real yields ▲ Policy: neutral	▼	▲	▼	▲▲	▼
Deflationary recession	Growth ▼, Inflation ▼, Real yields ▼ Policy: easing	▼▼	▲	▼▼	▼▼	▲▲
Inflation scare / policy mistake	Growth ▼, Inflation ▲, Real yields ▲ Policy: tightening	▼▼	▲	▼	▼	▼
Liquidity crunch / risk-off	Growth ▼, Inflation ▼ (with lag), Real yields ▲ Policy: tightening	▼▼	▲	▼	▼	▲▲

The scenarios and asset responses shown are indicative and for conceptual understanding. Actual market outcomes may differ.

Refer Disclaimer on slide #23

▲ Bullish ▼ Bearish

Why Equities

India's structural growth story continues to create wealth-building opportunities for investors.



3rd largest Global Pharmacy
Projected to **2x** to **\$130Bn** in 2030¹



69K KM of Rail Routes²
31K KM laid in 10 yrs³



Agriculture Technology
\$9Bn to **\$28Bn** (2030) growth⁴



World's **third-largest** funded
startup ecosystem⁵



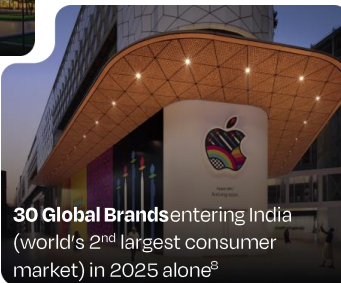
Semi-conductor market
projected to reach **\$110Bn** by
2030¹



Rapid Digitalization & UPI
transactions' daily avg. value
crosses **\$10.3Bn**⁶



More than **4 in 10** people
in India are under **25 years old**⁷



30 Global Brands entering India
(world's **2nd** largest consumer
market) in 2025 alone⁸

The next 20+ years will see India moving to a much larger domestic market

- As India's per-capita income grows beyond \$3000 (current: \$2750) consumption is likely to increase rapidly
- Listed companies have grown profits by 15% in the last decade
- With space to expand and a growing consumer base, domestic companies have large headroom
- Participating in a growing economy through equity markets with a diversified approach will allow investors to benefit in the long term.

Citations: ¹Press Information Bureau (Indian Govt.) ²The Hindu ³Statement by Union Minister of Railways ⁴Inc42 ⁵Economic Times ⁶India Brand Equity Foundation (IBEF) ⁷UN Population Division

⁸Clear Cut Magazine

Refer Disclaimer on slide #23

Why Commodities

Beyond just Gold & Silver, each with different triggers, providing stronger diversification benefits

Precious metals



Gold
~\$380 bn¹

Reserve asset, jewelry, electronics component, central bank holding

- Central bank reserves
- Safe-haven investor demand

Precious metals



Silver
~\$35 bn²

Solar panels, electronics and electricals, EVs, medical devices, jewelry

- Solar capacity expansion
- Electronics demand

Energy



Crude Oil
~\$3 trillion³

Transport fuels, petrochemicals, heating, aviation

- Geopolitical supply shocks
- OPEC cuts
- Travel & aviation surges

Energy



Natural Gas
~\$1 trillion⁴

Power generation, industrial heating, fertilizers, chemicals

- Coal-to-gas shift
- Electricity shortages
- Supply disruptions

Base Metals



Copper
~\$250 billion⁵

EVs, batteries, energy, electronics, construction (plumbing and wiring), electrical cables

- Acceleration in EV adoption
- Renewable energy buildout

Base Metals



Aluminum
~\$180 billion⁶

Automotives, packaging, aerospace, construction

- Housing & infrastructure spending
- EV and aerospace growth

Base Metals

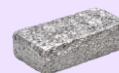


Zinc
~\$40 billion⁷

Galvanizing steel, construction, autos, chemicals

- Infrastructure spending
- Automotive production cycles

Base Metals



Nickel
~\$55 billion⁸

EV batteries, stainless steel, plating and coating, specialty alloys

- Acceleration in EV adoption
- Growth in stainless steel demand

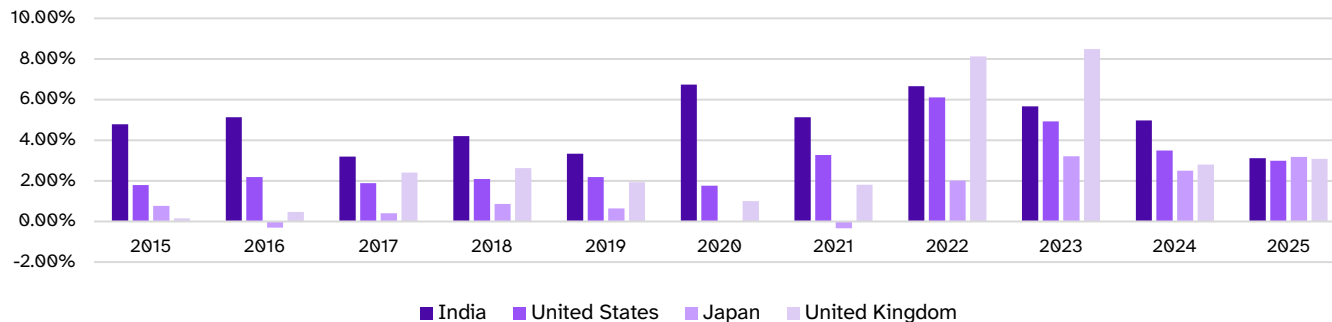
LEGEND: **Text -** Modern Industrial Use-Cases

Text - Potential Demand Triggers

Why Fixed Income

India Fixed Income poised to outshine global peers

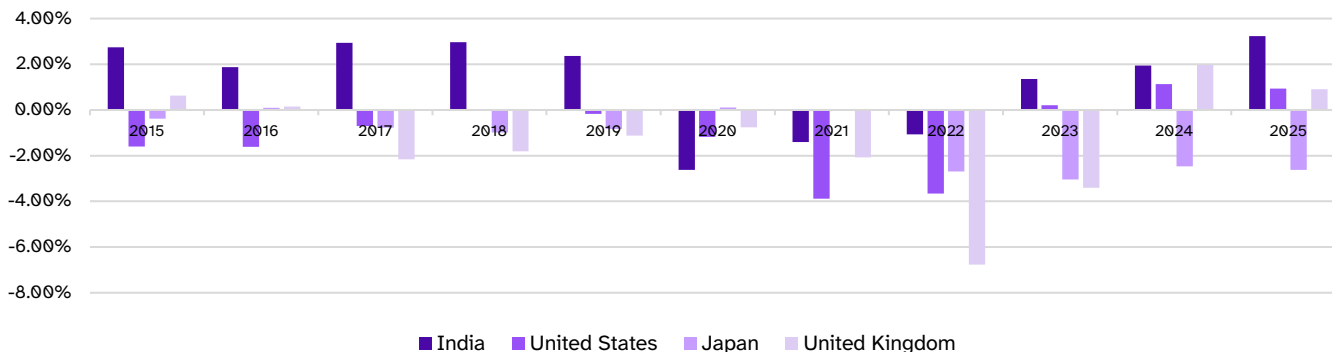
Yearly Average CPI



Inflation in India has undergone a significant transformation in recent years, moving from highs to a state of being "Tamed and anchored"*

* Economic Survey 2025-26

Yearly - Average Real Yield



India's fixed income edge: yields that stay ahead of inflation, unlike most developed markets.

Source - NSE Cogencis: Inflation measure based on Consumer Price Index - these are average of 12 monthly data points in a year.

Every asset has its year. No asset has every year.

The only consistent winner over time is diversification.

Rank	FY 15	FY 16	FY 17	FY 18	FY 19	FY 20	FY 21	FY 22	FY 23	FY 24	FY 25	FY 26
1	Nifty 500 +35%	Gold +10%	Natural Gas +55%	Crude Oil +29%	Nifty 500 +10%	Gold +36%	Crude Oil +179%	Natural Gas +125%	Gold +11%	Nifty 500 +40%	Natural Gas +174%	Silver +137%
2	Debt +14%	Debt +7%	Zinc +53%	Zinc +20%	Debt +7%	Debt +12%	Copper +78%	Crude Oil +76%	Silver +4%	Gold +14%	Gold +44%	Gold +64%
3	Zinc +10%	Silver -2%	Crude Oil +29%	Copper +15%	Gold +4%	Silver 1%	Nifty 500 +78%	Aluminum +64%	Debt +4%	Crude Oil +13%	Silver +42%	Crude Oil +59%
4	Aluminum +8%	Nifty 500 -7%	Aluminum +28%	Nifty 500 +13%	Natural Gas +3%	Aluminum -14%	Silver +67%	Zinc +58%	Nifty 500 -1%	Debt +8%	Zinc +26%	Aluminum +58%
5	Gold -4%	Zinc -9%	Nifty 500 +26%	Gold +7%	Copper +3%	Copper -19%	Zinc +45%	Nifty 500 +22%	Copper -6%	Silver +4%	Aluminum +14%	Copper +40%
6	Copper -4%	Aluminum -12%	Copper +18%	Debt +5%	Aluminum +1%	Nifty 500 -27%	Aluminum +44%	Copper +21%	Crude Oil -18%	Aluminum -1%	Copper +13%	Zinc +21%
7	Silver -13%	Copper -15%	Silver +15%	Aluminum +3%	Crude Oil -1%	Zinc -32%	Natural Gas +42%	Gold +19%	Zinc -26%	Copper -1%	Debt +9%	Debt +2%
8	Natural Gas -38%	Crude Oil -15%	Debt +11%	Silver -9%	Silver -1%	Natural Gas -32%	Debt +9%	Silver +7%	Aluminum -28%	Zinc -17%	Nifty 500 +6%	Nifty 500 -3%
9	Crude Oil -51%	Natural Gas -21%	Gold -1%	Natural Gas -10%	Zinc -4%	Crude Oil -76%	Gold +2%	Debt +5%	Natural Gas -58%	Natural Gas -26%	Crude Oil -12%	Natural Gas -22%

 Equity (Nifty 500)

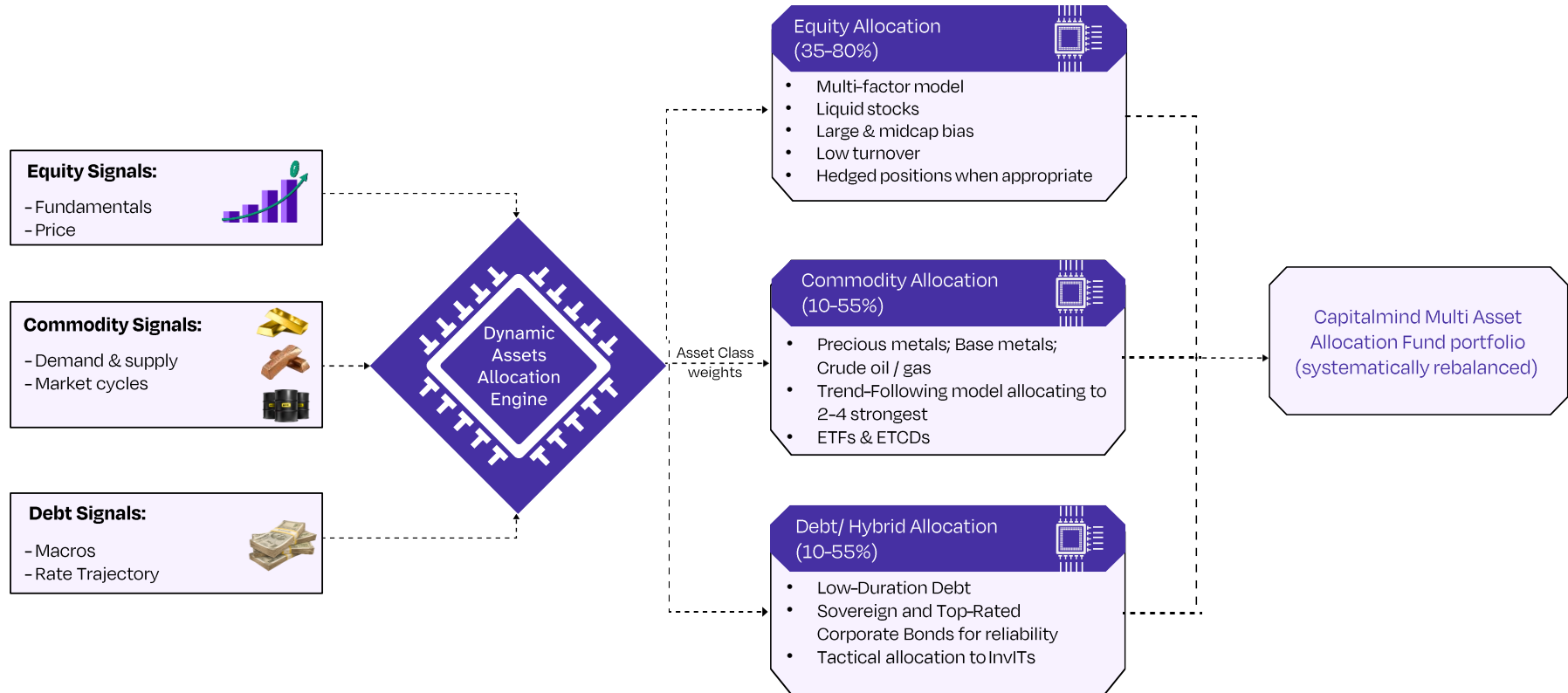
 Debt (Debt)

 Precious Metal (Gold, Silver)

 Energy (Crude Oil, Natural Gas)

 Base Metal (Copper, Aluminum, Zinc)

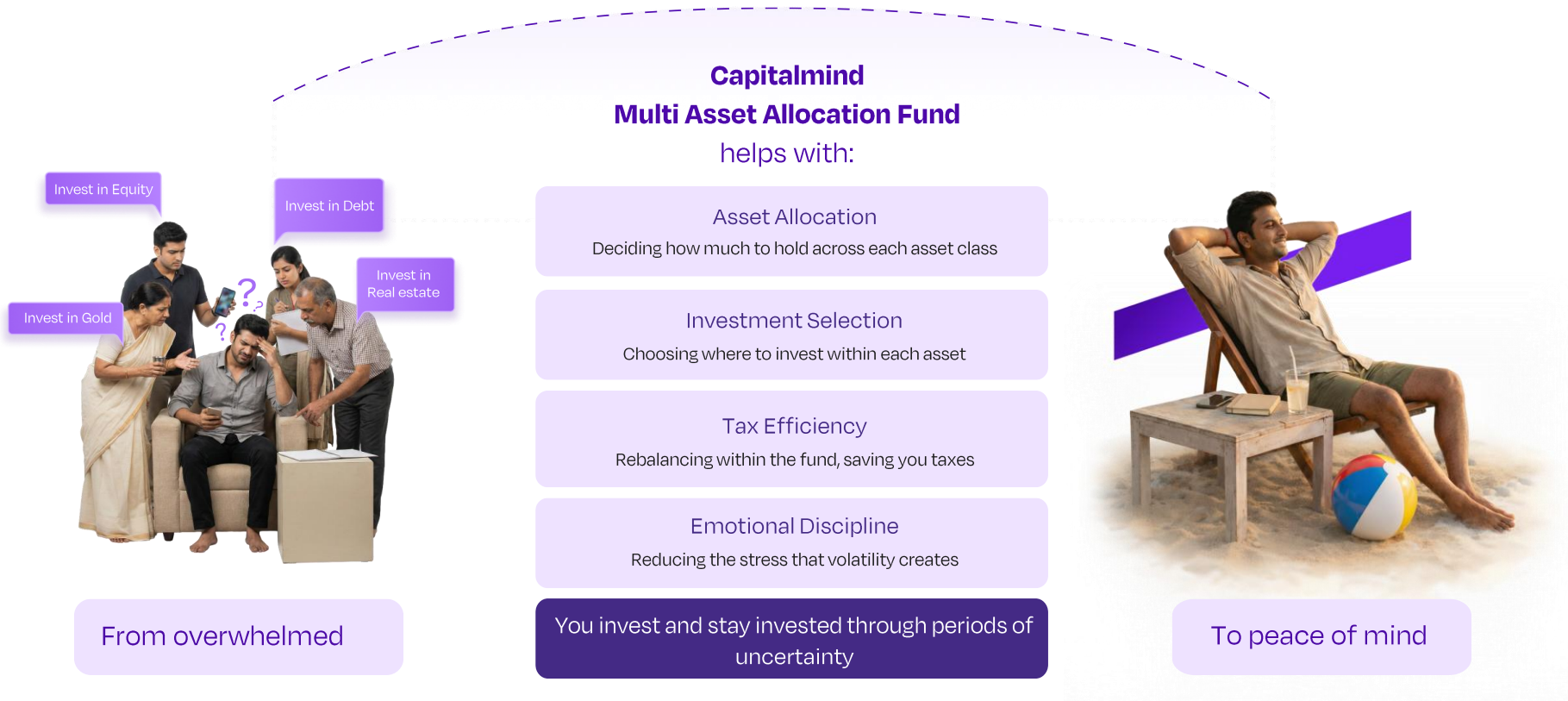
How do we allocate Assets?



Capitalmind Multi Asset Allocation Fund dynamically allocates across a broad range of assets depending on a rigorous quantitative framework

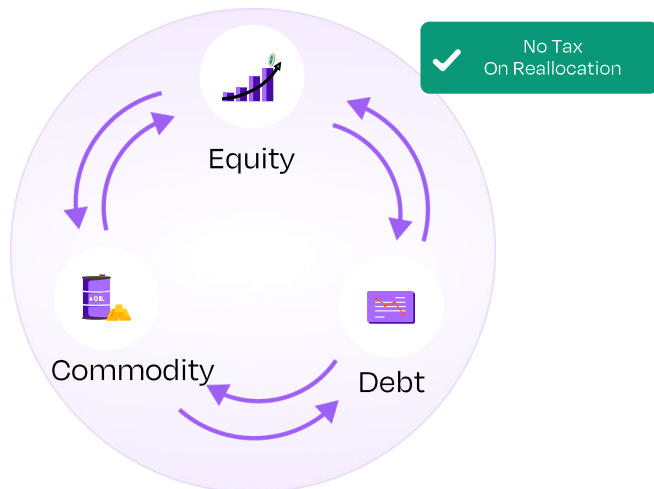
Fill it, Shut It, Forget It.

We designed this for your peace of mind.



Capitalmind Multi Asset Allocation Fund

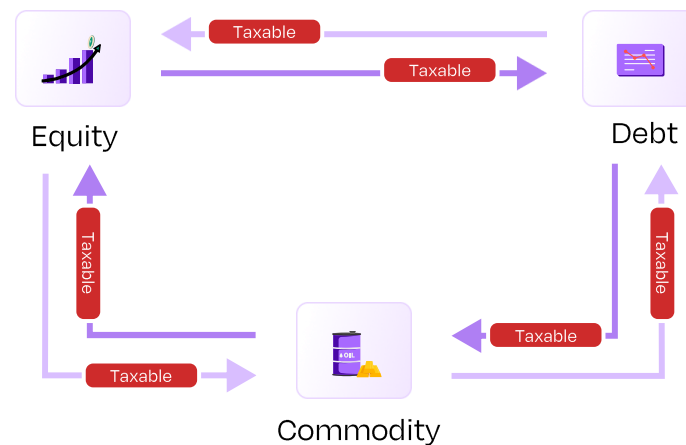
(Internal Asset Reallocation)



Rebalancing happens inside the tax-sheltered fund wrapper.
No capital gains tax is triggered.

Standalone Investments

(External Asset Reallocation)



Each switch is a "Redemption & Purchase", resulting in capital gains tax (STCG or LTCG) at every step.



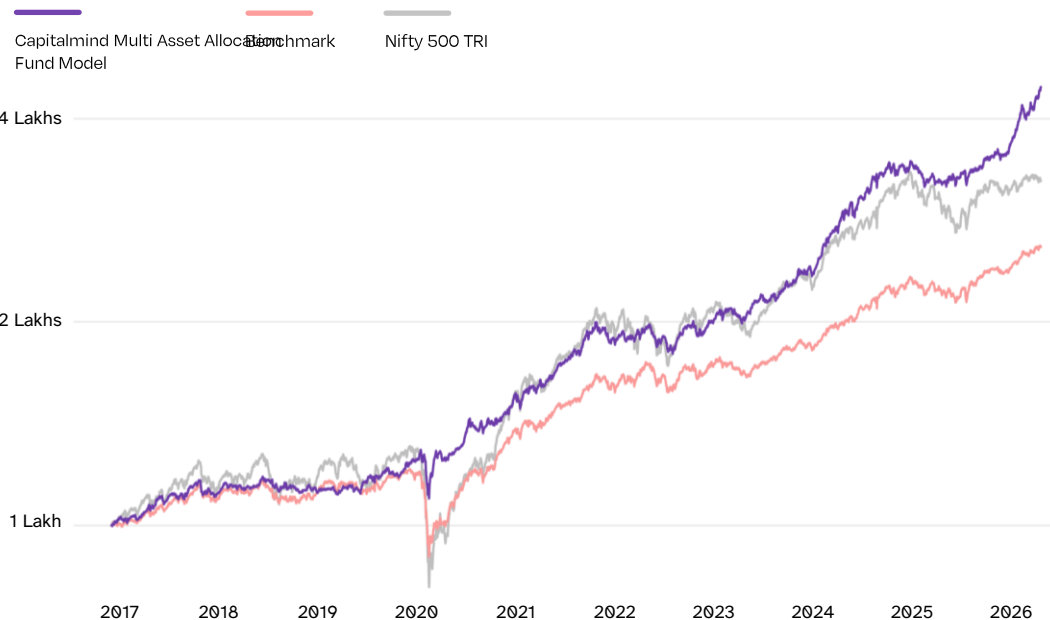
Core, all-in-one allocation for investors who:

- ✓ Want diversification without juggling equity, debt, and commodity allocations separately
- ✓ Have a 3-year or longer investment horizon
- ✓ Prefer a hands-off approach, without the stress of chasing markets
- ✓ Invest through SIPs or lump-sum
- ✓ Want to leverage the tax-efficient mutual fund structure for asset allocation

What to Expect

- ✓ A smoother investment journey than pure equity, with lower volatility and drawdowns
- ✓ A portfolio that automatically adapts to changing market conditions
- ✓ A disciplined, rules-based approach that helps you stay invested with confidence

What ₹1 Lakh could have become



Statistic	Description	CMMA Model	Benchmark#	Nifty 500 TRI*
CAGR	Compounded returns per year	18.6%	11.5%	14.4%
Sharpe	Return per unit of risk	1.8x	1.2x	0.9x
Sortino	Return per unit of downside risk	2.9x	1.0x	0.8x
Volatility	Standard deviation of returns	9.4%	9.8%	16.9%
Max Drawdown	Worst fall from peak	-15.2%	-25.9%	-38.1%

CMMA Model
turned ₹1 Lakh into

₹4.5L

18.6% returns per year

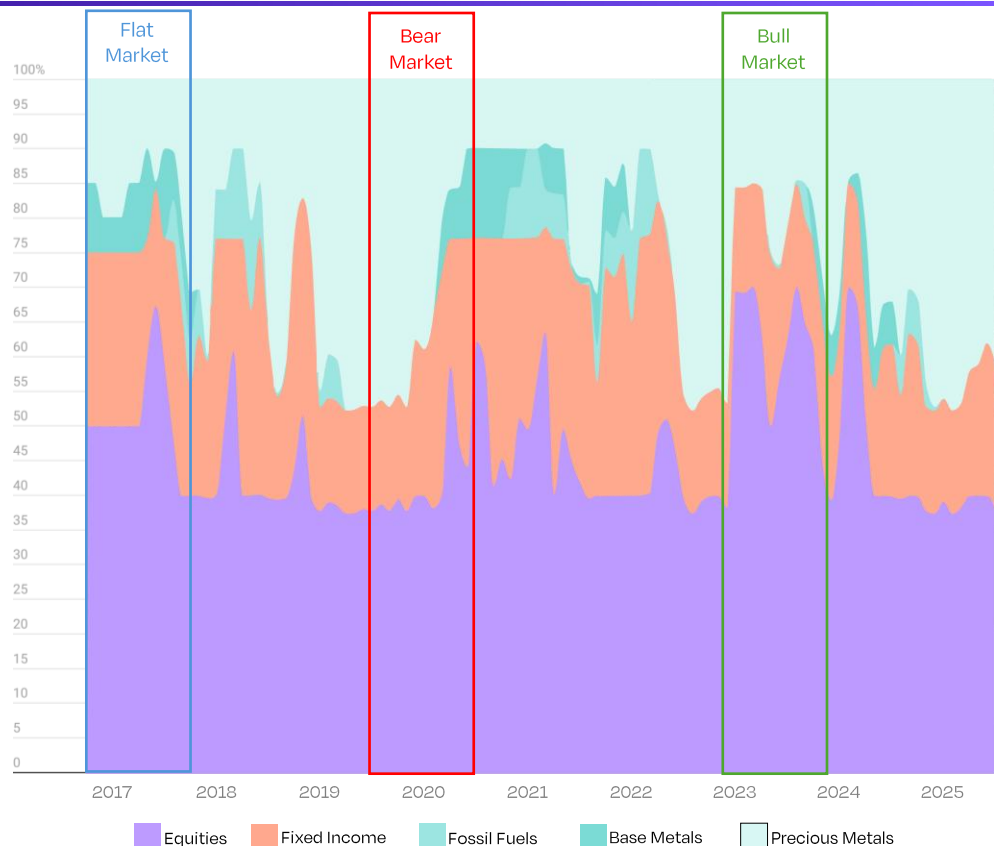
How benchmarks compared

Multi Asset Benchmark# ₹2.6L

Nifty 500 TRI* ₹3.5L

Simulation data from Mar-2017 to Dec-2025. The illustrations of the in-house model are for understanding the working of the model. The performance of the model does not represent the performance of the scheme. Actual allocation may vary. Portfolio will be managed as per the stated investment objective in the scheme information document (SID). Past performance may or may not be sustained in future and is not a guarantee of any future returns.* For illustrative comparison only and not a benchmark. #50% NIFTY 500 TRI + 25% NIFTY Composite Debt Index + 25% MCX iCOMDEX Composite Index

Our allocation depends on the market regime

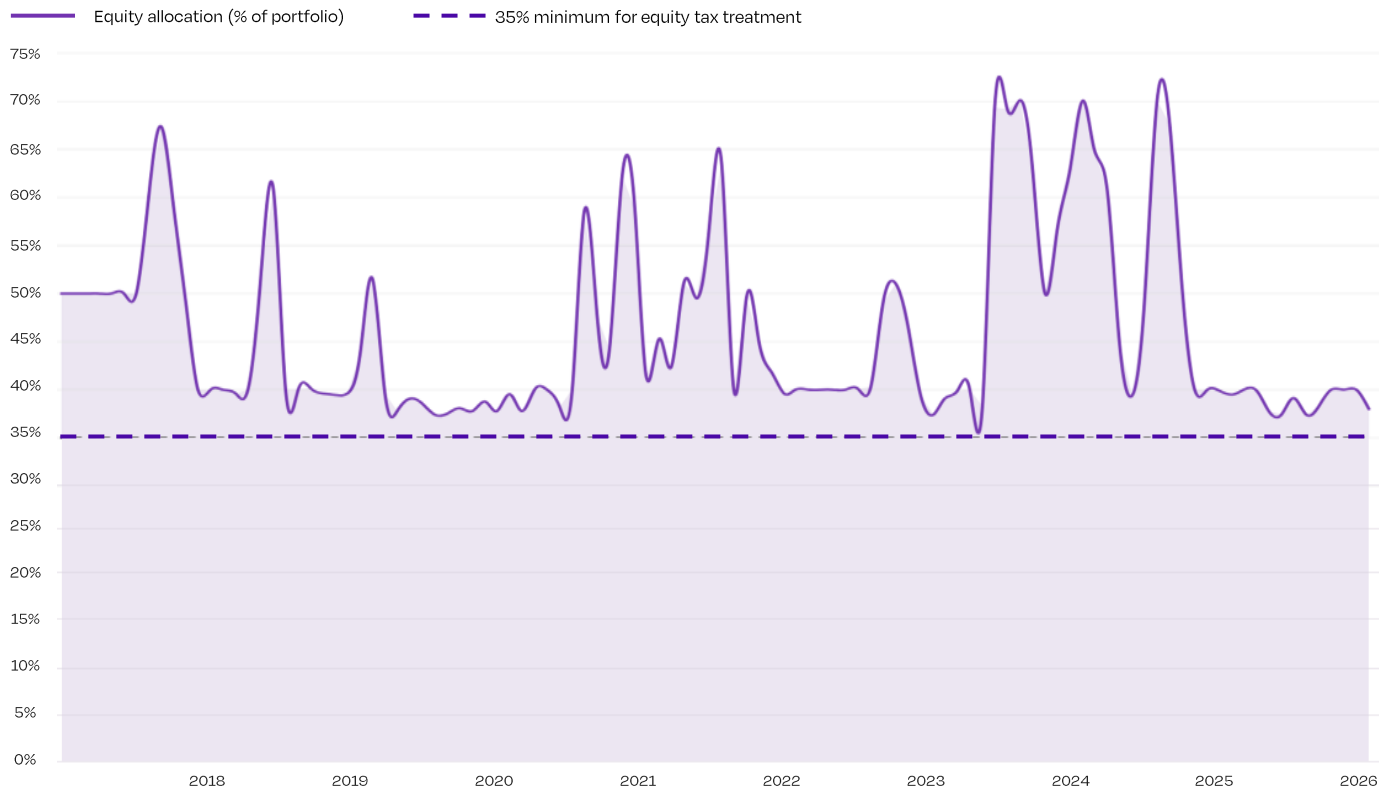


Asset Class	Equity Markets		
	Bear	Flat	Bull
Equities	Low	Neutral	High
Precious Metals	High	Neutral/High	Low
Base Metals	Low	High	Neutral/Low
Fossil Fuels	Low	High	Neutral/Low
Fixed Incomes	High	Neutral	Neutral/Low

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Additional layer for tax efficiency

≥35% equity means 12.5% LTCG, not slab-rate STCG



The 35% floor is by design

By holding **35%–65% in equity**, units held for **more than 24 months** qualify for Long-Term Capital Gains (LTCG) tax. This avoids the gains being added to your income and taxed at your slab rate..

Held under 24 months
(short-term)

Slab rate
Up to ~30%+

Held 24 months or more
(long-term)

12.5%
LTCG

Tax treatment is as per prevailing tax laws and may change. Tax benefits depend on your individual circumstances. Please consult your tax advisor.

Simulation data from Mar-2017 to Dec-2025. The illustrations of the in-house model are for understanding the working of the model. The performance of the model does not represent the performance of the scheme. Actual allocation may vary. Portfolio will be managed as per the stated investment objective in the scheme information document (SID). Past performance may or may not be sustained in future and is not a guarantee of any future returns. Note: It is assumed that fund will allocate more than 35% but less than 65% exposure in domestic equity & equity related instruments.

Dynamic rotation across commodities

From metals to energy to gold

	2017				2018				2019				2020				2021				2022				2023				2024				2025				Avg.	Max
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4						
Aluminum	5.0	4.9	5.1	6.0	-	-	-	-	-	-	-	-	-	-	-	-	-	6.9	6.3	0.5	-	-	-	-	-	-	-	-	-	6.7	6.9	-	-	-	-	5.4	6.9	
Copper	5.0	4.9	4.7	4.0	6.2	-	-	-	-	-	-	-	-	-	-	5.3	5.4	5.5	-	-	-	-	-	-	-	-	-	5.3	5.8	-	-	-	-	-	-	5.2	6.2	
Zinc	-	-	-	0.8	6.8	6.4	-	-	0.5	0.5	2.2	-	-	-	6.5	7.5	7.4	7.7	-	3.2	3.1	7.2	-	-	-	-	-	-	5.2	3.2	6.0	6.0	-	-	-	-	4.7	7.7
Crude Oil	-	-	-	-	6.1	4.6	7.0	6.4	-	-	6.0	-	-	-	-	-	7.5	7.3	-	3.5	5.9	4.8	0.5	-	-	0.5	0.5	1.9	-	-	-	-	-	-	-	4.5	7.5	
Natural Gas	-	-	-	-	-	-	6.0	6.9	0.5	-	-	-	-	-	-	-	5.0	5.6	4.0	-	6.7	7.7	0.5	-	-	-	-	-	-	-	-	6.7	2.9	-	-	4.8	7.7	
Silver	-	-	-	-	-	-	-	-	-	-	0.5	0.5	3.2	4.7	6.2	5.8	-	-	-	-	7.1	6.9	6.6	12.7	22.8	22.4	7.7	10.4	7.0	11.2	7.9	15.2	13.8	18.3	23.8	20.4	10.7	23.8
Gold	15.0	16.7	18.1	12.9	13.7	33.3	14.0	15.7	40.7	21.9	42.8	47.1	44.4	38.7	24.9	9.9	9.5	10.0	9.6	16.3	29.2	7.3	7.0	12.0	24.0	22.2	7.5	11.3	9.6	17.3	11.9	15.6	20.8	23.7	23.8	21.2	20.0	47.1
Total	25.0	26.5	27.9	23.7	32.8	44.3	27.0	29.0	41.7	22.4	51.5	47.6	47.6	43.4	37.6	28.5	22.3	35.7	29.4	29.8	43.4	34.0	26.1	25.7	46.8	44.6	15.7	22.2	23.8	39.5	29.7	43.7	47.3	44.9	47.6	41.6		

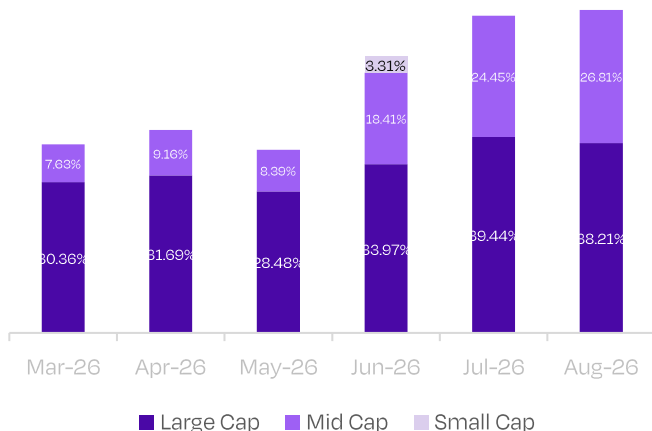
Average commodity allocations in each quarter. Gold and silver allocations simulated through positions in ETFs and commodity futures, rest through positions only in commodity futures.

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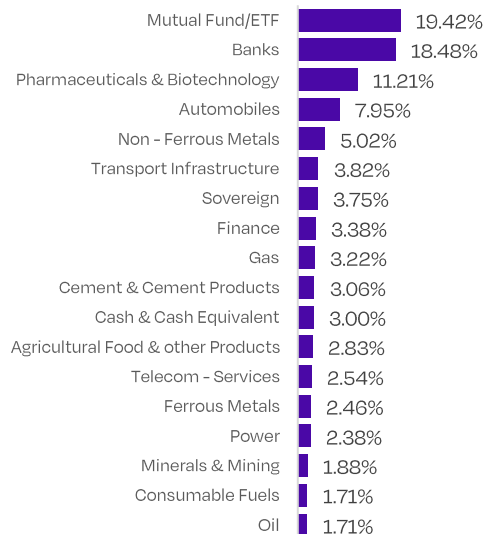
Refer Disclaimer on slide #23

CM MAAF Portfolio: Equity Allocation (August 2026)

**Equity Allocation by Market Cap
(% of AUM)**



**Equity Portion: Sector Allocation
(% of AUM)**



**Top 10 Equity Positions
(% of AUM)**

Name of the Instrument / Issuer	% to AUM
Bajaj Auto Limited	3.59%
Petronet LNG Limited	3.22%
Glenmark Pharmaceuticals Limited	3.16%
Grasim Industries Limited	3.06%
The Federal Bank Limited	3.04%
Hindalco Industries Limited	2.87%
Union Bank of India	2.86%
Axis Bank Limited	2.84%
Marico Limited	2.83%
Sun Pharmaceutical Industries Limited	2.82%

The fund holds mostly large cap companies, which tend to be steadier.
A smaller part goes to mid- and small-sized companies, which can grow faster.

CM MAAF: Commodity and Debt Allocation (August 2026)

50 Days

Macaulay Duration

5.78%

YTM of Portfolio

50 Days

Average Maturity

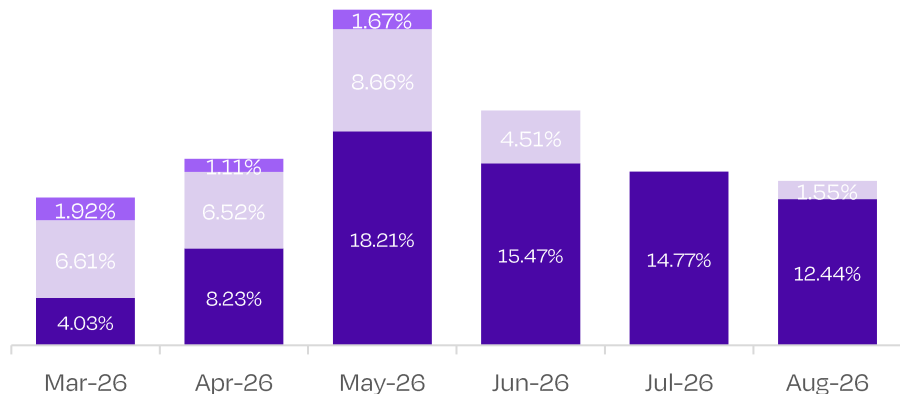
49 Days

Modified Duration

Debt Allocation (% of AUM)

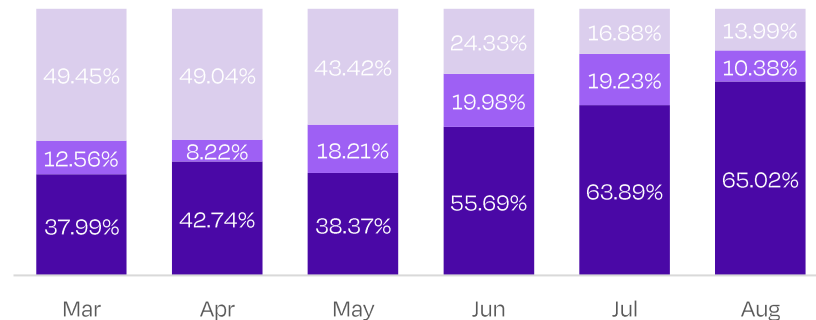
Rating	% to AUM
AAA / A1+	5.08%
Sovereign & Cash Equivalent	3.75%

Commodity Allocation (% of AUM)



■ Precious Metals ■ Base Metals ■ Energy

Asset Classification

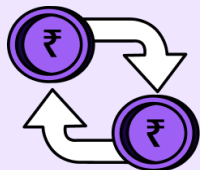


■ Equity ■ Commodities ■ Debt*

ETCD (Commodity Futures) positions are shown separately, as notional value to give investors a clear view of allocation across asset classes. Futures require only a margin deposit backed by cash and not the full contract value. The cash backing these positions is held in TREPS and money market instruments. * Cash & Others included in Debt

Who is suited to invest in this Scheme?

While the Scheme is open to eligible investors, it is especially suitable for patient investors, those who bring these qualities to the market.



For investors who want diversification without juggling equity, debt, and commodity allocations separately



Want to leverage the tax-efficient mutual fund structure for asset allocation



Understand the philosophy of rule-based, quantitative approach towards investing



Prefer a hands-off approach, without the stress of chasing markets

Offline

Application forms available at:

Capitalmind Application Form
(capitalmindmf.com/investor.html)

You may submit them at:

Corporate Office

KFIN Branches across India

Online

Also available on all major online platforms:



Capitalmind



Coin



Groww



ET Money



ICICI Direct



KFintech



Kuvera



Dhan



Paytm Money



INDmoney



MF Utilities



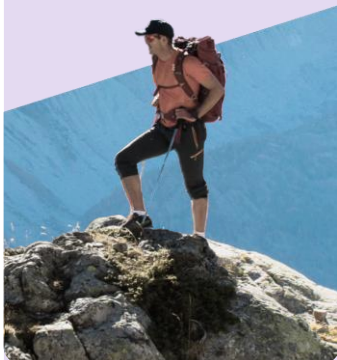
MFCentral

Key Facts

	Investment Objective	The scheme seeks to generate long term capital appreciation by investing in a diversified portfolio by investing in equity and equity related instruments, debt and money market instruments, Commodities including Exchange Traded Commodity Derivatives. However, there is no assurance or guarantee that the investment objective of the Scheme will be achieved.
	Inception Date	16 March 2026
	Plan & Options	Plan: Regular Direct Option: Growth Income Distribution cum Capital Withdrawal (IDCW)
	Asset Allocation	Equity & Equity related Instruments: 35% to 80%; Debt Securities and Money Market Instruments: 10% – 55% Units issued by INVITs: 0% to 10%; Gold, Silver and Commodities related ETFs, ETCDs and instruments: 0% to 10%
	Minimum Amount	Fresh Lumpsum Investment: ₹5,000 and multiples of ₹1 thereafter SIP / STP / SWP : ₹1,000 and multiple of ₹1 thereafter
	Type of Scheme	An open-ended scheme investing in equity and equity related instruments, debt and money market instruments, Commodities including Exchange Traded Commodity Derivatives. It is clarified that the Scheme is an active scheme of the Mutual Fund.
	Benchmark	50% NIFTY 500 TRI + 25% NIFTY Composite Debt Index + 25% MCX iCOMDEX Composite Index
	Exit Load	1% of applicable NAV if redeemed / switched-out within 12 months from date of allotment; Nil thereafter
	Facilities Offered	SIP, STP, SWP and Inter-Scheme Switching Facility. Please refer to SID for further details.
	Fund Manager(s)	Mr. Anoop Vijaykumar (Since Inception); Mr. Prateek Jain (Since 8 Aug 2025); Mr. Divyansh Agnani (Since 20 Apr 2026)

Capitalmind Flexi Cap Fund

Equity



An open-ended dynamic equity scheme investing across large cap, mid cap & small cap stocks

(Since August 4, 2025)

₹ 476.28 Cr

Capitalmind Liquid Fund

Debt



An open-ended Liquid scheme. A relatively low-interest rate risk and relatively low credit risk fund

(Since November 28, 2025)

₹ 98.26 Cr

Capitalmind Multi Asset Allocation Fund

Hybrid



An open-ended scheme investing in equity and equity related instruments, debt and money market instruments, Commodities including Exchange Traded Commodity Derivatives

(Since March 16, 2026)

₹ 39.33 Cr

Capitalmind Arbitrage Fund

Hybrid

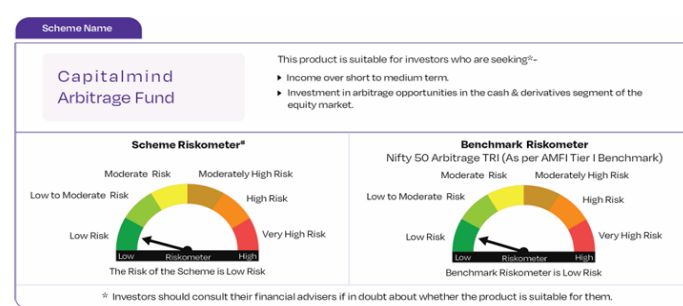
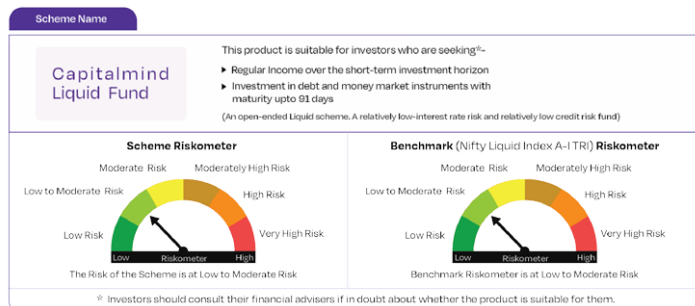
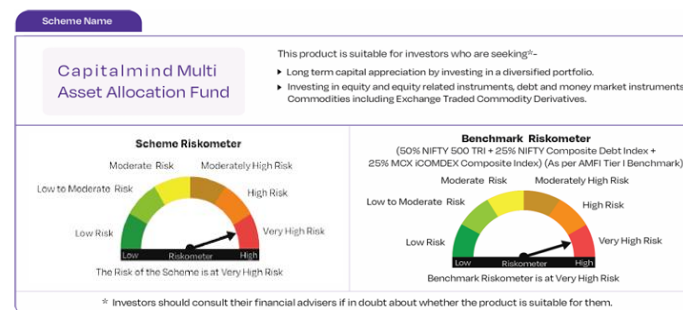
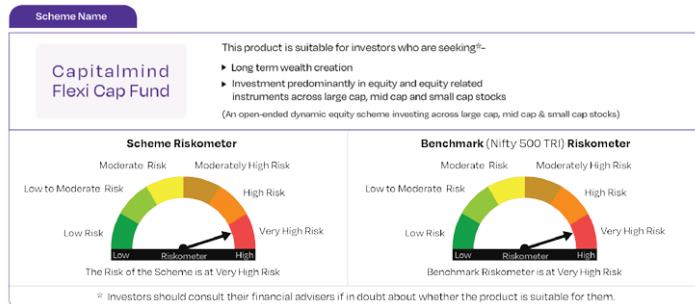


An open-ended scheme investing in arbitrage opportunities

(Since March 16, 2026)

₹ 22.88 Cr

Product Labelling & Risk-o-meter



Potential Risk Class ("PRC") Matrix of the capitalmind Liquid Fund

Credit Risk →			
Interest Rate Risk ↓			
Relatively Low (Class I)	A-I		
Moderate (Class II)			
Relatively High (Class III)			

Please visit the website for latest Riskometer updates:

[Capitalmind Asset Management](#)

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MUTUAL FUND INVESTMENTS ARE SUBJECT TO MARKET RISKS, READ ALL SCHEME RELATED DOCUMENTS CAREFULLY

Thank You

Capitalmind Mutual Fund

SEBI Reg. No. : MF/084/25/10

Registered Office: 1st Floor, Prakash Arcade, #2323, 17th
Cross Road, 1st Sector, HSR Layout, Bengaluru, Karnataka
560102

Name of the Asset Management Company:

Capitalmind Asset Management Private Limited

Name of the Trustee Company:

Capitalmind Trustee Private Limited



1800 570 5001



support@capitalmindmf.com

Annexure I: About Capitalmind



Founded in 2014



~5000cr. in AUM*



5000+ articles on
investing



PMS (8 yrs), Mutual Funds
(1 Year)



500,000+ podcast
downloads

Our Journey as an Asset manager

Nov 2017

PMS
license

Got PMS license
and launched
our wealth
management
journey

Jun 2019

100
Crores

Touched 100 Cr
in AUM in PMS

Jul 2021

500
Crores

Zoomed past
500 Cr in AUM in
PMS

Jun 2024

2,000+
Crores

Surpassed the
milestone of
2000 Crores in
AUM in PMS
with 1000+
clients

Apr 2025

Mutual Fund
license

Final approval
from SEBI to
launch Asset
Management
Company
(Mutual Fund)

Board of Directors - Trustee

Independent oversight ensuring investor interests are protected

Independent Director	Independent Director	Independent Director	Associate Director
Ajay Rotti Entrepreneur, Consultant, Investment Banker 	Rakesh Godhwani Entrepreneur, Author, IIM and IISc Faculty 	Jasnoor Gill Product Management leader 	Avijeet Sen Financial Services Expert 
Experience • Founder, Tax Compass • Founding Partner, Dhruva Advisors LLP • Partner (International Taxation) – KPMG • BMR Advisors • Ernst & Young • Member, ICAI Education • LLB, Karnataka State Law University • Advanced Diploma – Management Accounting – Chartered Institute of Management Accountants UK • Gold Medalist (B. Com) – Bangalore University	Experience • MD and CEO, School of Meaningful Experiences P/L • Adjunct Faculty of Communication, IIM Bangalore • Head, IIMB Alumni Association Office Education • PhD, Cardiff Metropolitan University, Wales (UK) • PGSEM (MBA), IIM Bangalore • BE, Computer Science, NIT Karnataka	Experience • Senior Director of Product Mgmt., Nutanix Technologies • Product Director, Idea Device Technologies Education • PGPM (IT Management, Strategy and Leadership), Indian School of Business • BE, Electronics & Telecommunications, Army Institute of Technology	Experience • Director, Convergery P/L, Singapore • Director, Open Banking at Mastercard Asia Pacific • Head of Strategic Partnerships, Grab Financial Group • Strategy & Corporate Development, Standard Chartered Bank Education • BE, Electrical & Electronics, Nanyang Technological University, Singapore

Board of Directors - AMC

Seasoned professionals with deep expertise across finance, technology and regulation

Independent Director	Independent Director	Associate Director	Associate Director
Samit Singh Entrepreneur, Banking and Wealth Management Expert 	Vinay Kesari Entrepreneur & Lawyer with expertise in Financial Services sector 	Deepak Shenoy Founder and CEO Capitalmind 	Vashistha Iyer Founding team & COO Capitalmind 
Experience • Founder, Happy Retirement • Executive Director, Corporate & Investment Banking, JP Morgan • Executive Director, Asset & Wealth Management, JP Morgan Education • MBA (Marketing & Finance), Faculty of Management Studies, ML Sukhadia University • B.Sc. (Hons) Physics, Delhi University	Experience • General Counsel & Founding Team, Setu (now part of Pine Labs) • Director - Operations & Strategy, Setu AA (now part of Pine Labs) • Managing Associate (Policy & Advisory), Luthra & Luthra Law Offices Education • B.A. LL.B. (Hons), Nalsar University of Law, Hyderabad	Experience • Director and CEO, Capitalmind Financial Services leading fund management, wealth management and research Education • PGDBM (Banking & Finance), Narsee Monjee Institute of Management Studies • BE, Computer Science, NIT Karnataka	Experience • Chief Operating Officer, Capitalmind Financial Services leading operations and technology • Chief of Staff, Office of Mr. PD Raj, Lok Sabha Member of Parliament • Fellow - Legislative Assistants to Members of Parliament (LAMP) Fellowship Education • PGDM (Finance), IMT Ghaziabad • Bachelor of Fashion Technology, NIFT Gandhinagar

Founded and led by Deepak Shenoy

Rigorous Thinking. Plain Language. Making Markets Make Sense



@DeepakShenoy

CEO – Capitalmind Mutual Fund

20+ Years in Markets

5000+ Articles Authored

A recognized voice in Indian finance for over two decades.

Key Experience

- Founder and Director – Capitalmind
- Co-Founder and Chief Executive Officer – Moneyyoga.com
- Chief Executive Officer, India – FLOvate Technologies
- Co-Founder and Chief Executive Officer, Agni Software
- *Bachelors of Engineering from NITK Surathkal*

Thought Leadership

- Educating investors on markets, policy and personal finance – **278k followers** on X (formerly Twitter)
- *Long form conversations on investing, macroeconomics and market strategy:*
500,000+ Podcast Downloads
- Video content on markets, fund strategy and financial education on @CapitamindHQ with **27k Subscribers**



Media & Commentary

CNBC-TV18 · ET Now · Mint · Bloomberg Quint

Regular market commentator and guest expert — translating data and macro trends into clear, actionable insight for a mass audience.

Equity and Fixed Income Expertise

Systematic, evidence-driven approach



Anoop Vijaykumar
@CalInvestor

Earlier associated with Capitalmind PMS as Fund Manager and Head of Investment Research during 2019-2025, driving systematic, evidence-based portfolio construction.

Head of Equity, Capitalmind Mutual Fund
Overall 20+ Years Experience

Funds Managed:

- 1) Capitalmind Flexi Cap Fund (Since Inception)
- 2) Capitalmind Liquid Fund (Since Dec 2025)
- 3) Capitalmind Multi Asset Allocation Fund (Since Inception)
- 4) Capitalmind Arbitrage Fund (Since Inception)

Previously associated with



AT Kearney

Alumnus of



Prateek Jain
@Prateekomics

Expertise in fixed-income portfolio management, managing liquid and overnight funds, duration and asset allocation strategies, yield-curve positioning, and daily cash-flow management.

Head of Fixed Income, Capitalmind Mutual Fund
Overall 15+ Years Experience

Funds Managed:

- 1) Capitalmind Flexi Cap Fund (Since Aug 2025)
- 2) Capitalmind Liquid Fund (Since Inception)
- 3) Capitalmind Multi Asset Allocation Fund (Since Inception)
- 4) Capitalmind Arbitrage Fund (Since Inception)

Previously associated with



Alumnus of



Divyansh Agnani
@DivyanshAgnani

Expertise in building quantitative strategies. Previously a quant analyst across Capitalmind's PMS, AIF, and MF mandates.

Associate Fund Manager, Capitalmind Mutual Fund
Overall 3.5+ Years Experience

Funds Managed:

- 1) Capitalmind Flexi Cap Fund (Since 20 April 2026)
- 2) Capitalmind Multi Asset Allocation Fund (Since 20 April 2026)

Previously associated with



Alumnus of



Annexure II: Factsheet Disclosures

Allocation of Net Assets

