



# INVEST WITHOUT SECOND GUESSING



PRESENTING

## Edelweiss Nifty LargeMidcap250 Plus 8-13 Year G-Sec 70:30 Index Fund

(An open-ended index scheme replicating Nifty LargeMidcap250 Plus 8-13 yr G-Sec 70:30 Index )

**NFO PERIOD** 18<sup>TH</sup> March - 01<sup>ST</sup> April 2026

*Three definitive decisions making investing simple!*

### Allocation

70 equity : 30 debt by design — built for India's market cycles. Monthly rebalancing enforces discipline.

### Selection

Nifty LargeMidcap250: breadth + balance.  
8-13yr G-Sec: sovereign safety + potential duration upside.

### Timing

Automatic reset between equity & debt. Removes behavioral bias. No market timing required from the investor.

**What this index does NOT carry:**

x Credit Risk

x Style Drift

x Duration Drift

x Allocation Timing Risk

## Alpha. Tax Efficiency. Stability.

Monthly rebalanced | Equity does the heavy lifting. G-Secs hold the floor.

# 70%

## Nifty LargeMidcap250

- 250 stocks across 100 Largecap + 150 Midcap
- Covers 85% of India's free-float market cap
- Equal 50:50 weight to large and mid – the broadest balanced equity index

### 14.5%

Avg 3Y Rolling Return

### 14.7%

Avg 5Y Rolling Return

### +4.48%

Avg Vs Nifty 50 (all periods)\*

# 30%

## Nifty 8-13 Yr G-Sec

- Sovereign-only
- Zero credit risk
- Reducing portfolio volatility
- Most liquid segment in Indian debt market

### 6.77%

Yield to Maturity

### 6.70yr

Modified Duration

### 9.29yr

Average Maturity

Monthly rebalancing enforces discipline – Automatic reset between equity & debt.

Source: NSE. Data as of 28th Feb 2026. \*Trailing returns. Past performance may or may not be sustained in the future.

## Competitive Returns vs Active Funds. At Lower Volatility.

Trailing Returns vs. AHF category vs. BAF category vs. Largecap category

Period	70:30 Index Return	70:30 Std Dev	AHF Category Avg Return	AHF Category Avg Std Dev	BAF Category Avg Return	BAF Category Avg Std Dev	Laregecap Category Avg Return	Laregecap Category Avg Std Dev
1 Year	14.49%	7.91%	13.30%	8.84%	12.06%	7.10%	15.30%	11.24%
3 Years	16.08%	7.98%	14.98%	9.11%	12.75%	6.94%	15.98%	11.69%
5 Years	13.15%	8.51%	13.05%	10.01%	10.44%	7.07%	13.01%	13.01%
10 Years	14.36%	9.31%	13.28%	11.47%	11.42%	8.50%	14.09%	15.01%

**Beats Active AHFs Across All Periods**

70:30 index outperforms the AHF category across 3, 5, and 10 years with lower volatility.

**Similar returns profile as Large Cap – lesser volatility**

3Y & 5Y CAGR competitive, with ~35–40% lower volatility (8.51% vs 13.01% over 5Y).

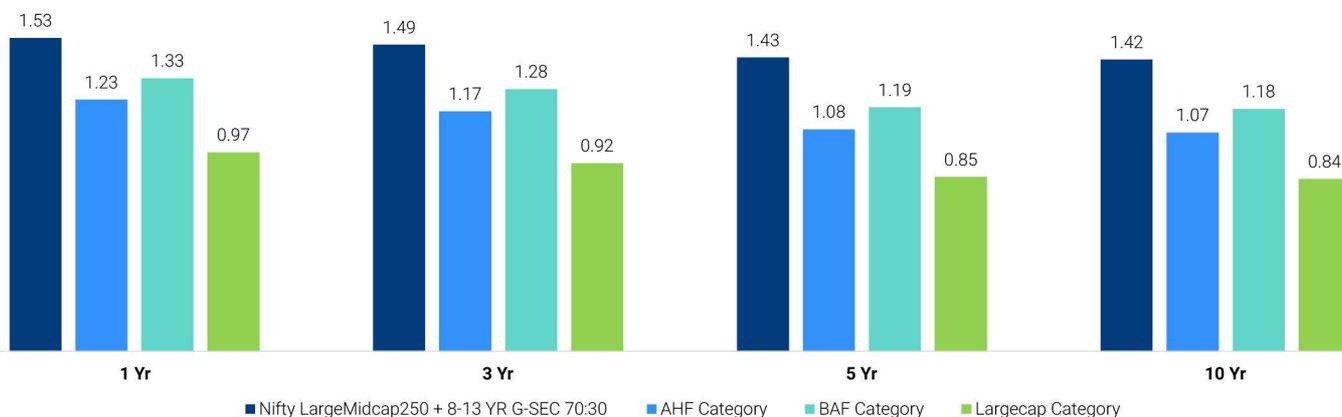
**The 10-Year risk-reward profile**

Over 10Y: Comparable returns but significantly lower volatility vs large caps.

Source: NSE, ACE MF. Data as of 28th Feb 2026. Returns >1 year are CAGR. Expense of 0.5% p.a are deducted from the returns of the hybrid index. Category average of AHF,BAF and Largecap are calculated using Regular Plan returns of funds in existence since 2011. The rationale for comparing the Hybrid Index with Largecap is to present it as an alternative/ additional option for investors seeking broad market exposure with relatively lower volatility. Past performance may or may not be sustained in the future. Returns of Nifty LargeMidcap250 Plus 8-13 yr G-Sec 70:30 Index correspond to the Index and should not be construed as returns of the fund.

# More Return Per Unit of Risk. Consistently. At Every Horizon.

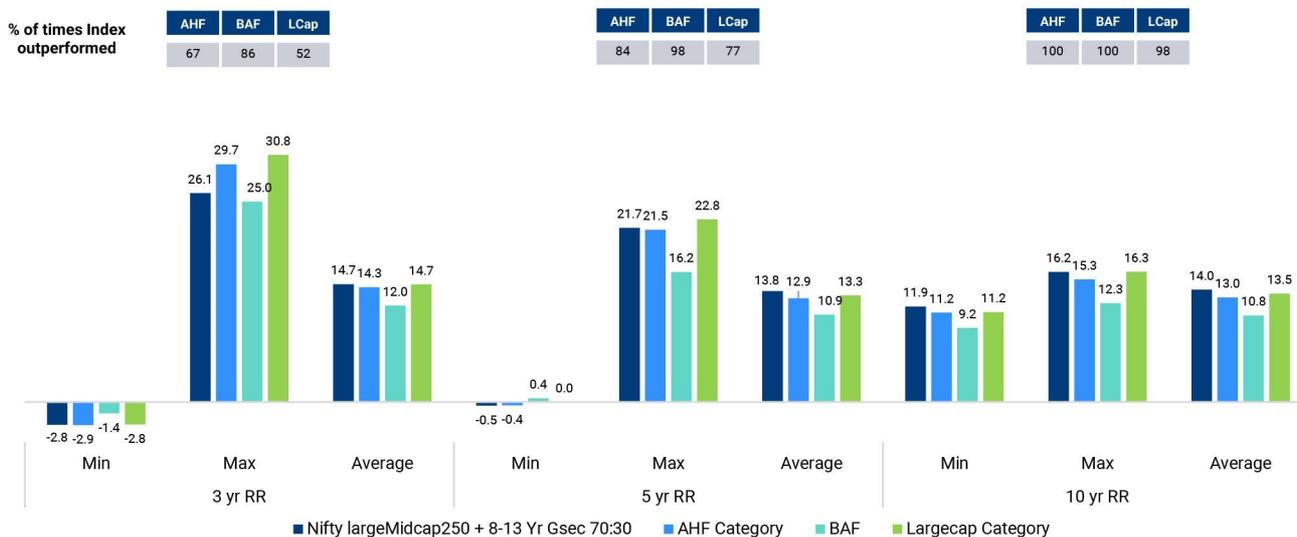
Return per unit of risk basis rolling periods



Source: NSE, ACE MF. Rolling returns for the period 03rd January 2011 – 28th February 2026. Expense of 0.5% p.a are deducted from the returns of the hybrid index. Category average of AHF,BAF and Largecap are calculated using Regular Plan returns of funds in existence since 2011. The rationale for comparing the Hybrid Index with Largecap is to present it as an alternative/ additional option for investors seeking broad market exposure with relatively lower volatility. Past performance may or may not be sustained in the future. Returns of Nifty LargeMidcap250 Plus 8-13 yr G-Sec 70:30 Index correspond to the Index and should not be construed as returns of the fund.

## SIP returns

SIP Suitability – 70:30 Index vs. AHF category vs. BAF category vs. Largecap category (Rolling SIP returns %)



Source: NSE, ACE MF. Rolling returns for the period 03rd January 2011 – 28th February 2026. Expense of 0.5% p.a are deducted from the returns of the hybrid index. Category average of AHF,BAF and Largecap are calculated using Regular Plan returns of funds in existence since 2011. The rationale for comparing the Hybrid Index with Largecap is to present it as an alternative/ additional option for investors seeking broad market exposure with relatively lower volatility. Past performance may or may not be sustained in the future. Returns of Nifty LargeMidcap250 Plus 8-13 yr G-Sec 70:30 Index correspond to the Index and should not be construed as returns of the fund.

## Fund Details

<b>Scheme Type</b>	<b>An open-ended index scheme replicating Nifty LargeMidcap250 Plus 8-13 yr G-Sec 70:30 Index</b>
<b>Investment objective</b>	Passive investment in equity and equity related securities & debt securities replicating the composition of Nifty LargeMidcap250 Plus 8-13 yr G-Sec 70:30 Index, subject to tracking errors. However, there is no assurance that the investment objective of the Scheme will be realized, and the Scheme does not assure or guarantee any returns.
<b>Category of the Scheme</b>	Index Funds
<b>NFO Period</b>	18 <sup>th</sup> March 2026 to 1 <sup>st</sup> April 2026
<b>Fund Manager/s</b>	Equity Portion – Mr. Bhavesh Jain and Mr. Bharat Lahoti Debt Portion – Mr. Dhawal Dalal and Mr. Hetul Raval
<b>Exit Load</b>	Nil
<b>Expense ratio</b>	Maximum upto 1%
<b>Minimum NFO Subscription</b>	Minimum of Rs. 100/- and multiples of Re. 1/- thereafter.

### Past performance may or may not be sustained in future and should not be used as a basis for comparison with other investments

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### Investment Objective

- Passive investment in equity and equity related securities & debt securities replicating the composition of Nifty LargeMidcap250 Plus 8-13 yr G-Sec 70:30 Index, subject to tracking errors.
- There is no assurance that the investment objective of the scheme will be achieved.

\* Investors should consult their financial advisors if in doubt about whether the product is suitable for them.

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The risk of the scheme is Very High

Nifty LargeMidcap250 Plus 8-13 yr G-Sec 70:30



The risk of the benchmark is Very High

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