EDELWEISS MUTUAL FUND

POWER SIP/STP

Because markets change.
So should your investment!

Do these investing dilemmas sound familiar?

01
Should I invest more when the market falls?

02
Is it a good time to increase my SIP or STP ?

03
I want to stay consistent but also take advantage of dips. How can I do that?

04
I realize opportunities only after they've passed!

05
What if I invest more and market falls further?

06
Can disciplined investing be more dynamic?

About Power SIP/ STP:
Dynamic, yet systematic investment

Purpose

Automatically increase SIP instalments at opportune times.

Instalment Logic

Each instalment is either the Base Amount or a Higher multiplied amount, powered by a proprietary market indicator, Edelweiss Equity Fundamental Index (EEFI).

EEFI Mechanism

Currently the model assigns equal weights to variants of factors such as P/E, P/B, and Market cap to GDP, or such other factors*

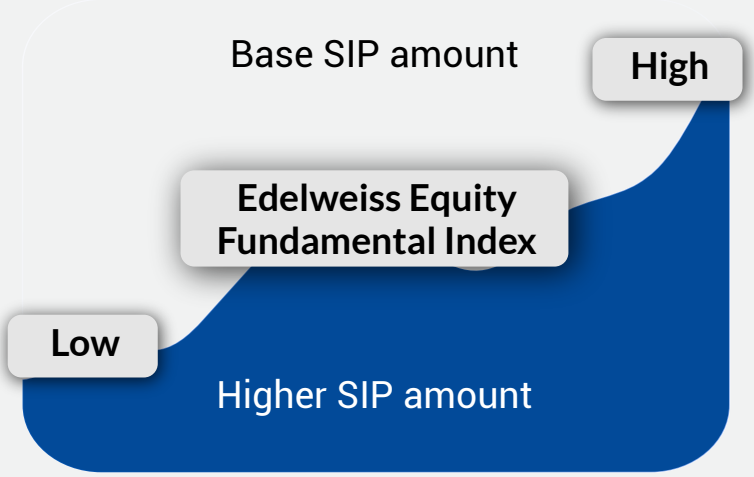
*Edelweiss AMC reserves the right to revise, add, or remove factors as deemed appropriate considering evolving market dynamics.

Some key factors behind EEFI

The model currently uses equal-weighted factors*

Edelweiss Equity Fundamental Index (EEFI)

- Price to Earnings
- Price to Book
- Market cap to GDP
- Other Factors*



Note: The Edelweiss Equity Fundamental Index (EEFI) which is an internal model of Edelweiss AMC. *The list of factors mentioned above is not exhaustive and Edelweiss AMC reserves the right to revise, add, or remove factors as deemed appropriate considering evolving market dynamics.

How is the installment amount determined?

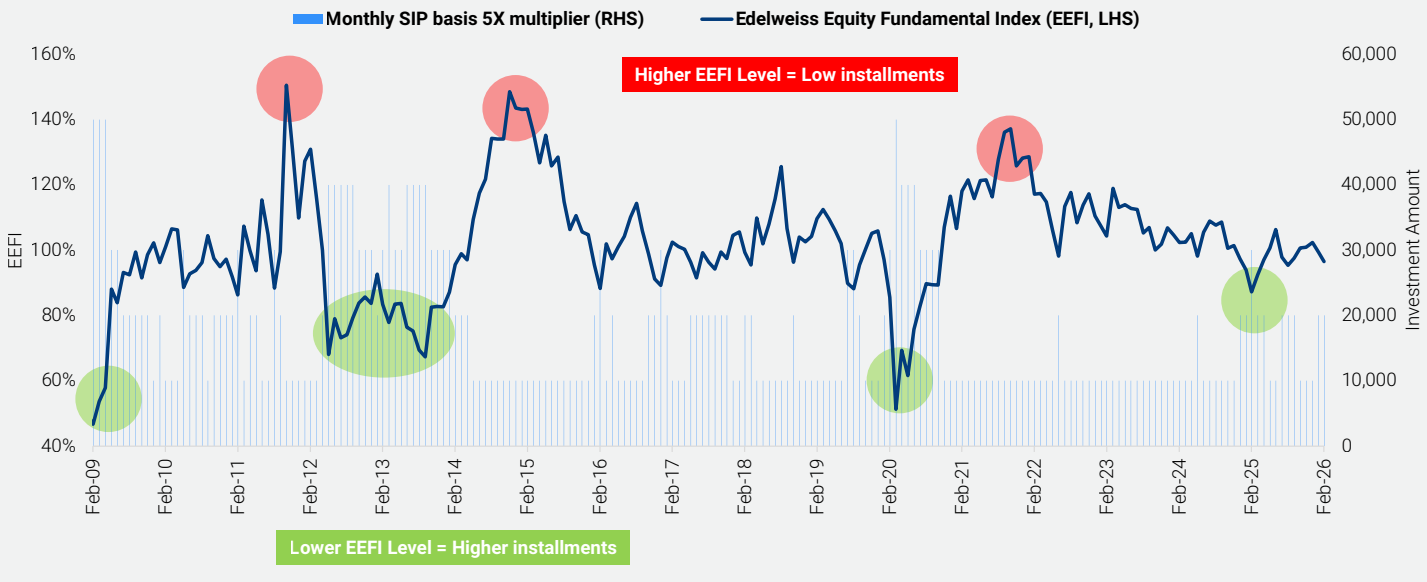
Two ways to power up your SIP/STP, pick what fits you best!

EEFI* Range		5x Multiplier	10x Multiplier
From	To	Option 1	Option 2
	<=60%	5x	10x
>60%	<=70%	4x	8x
>70%	<=80%	4x	6x
>80%	<=90%	3x	4x
>90%	<=100%	2x	2x
>100%		1x	1x

Source: Internal Analysis | *For illustrative purpose | Note: The multiplier is decided based on the Edelweiss Equity Fundamental Index (EEFI) which is an internal model of Edelweiss AMC | Edelweiss AMC reserves the right to revise, add, or remove factors as deemed appropriate considering evolving market dynamics.

EEFI and monthly installment

Higher allocation at lower EEFI level, base allocation at higher EEFI level



Source: Ace MF, Internal Analysis | Data as on Feb 28, 2026 | Note: The investment amount is decided based on the Edelweiss Equity Fundamental Index (EEFI) which is an internal model of Edelweiss AMC | Edelweiss AMC reserves the right to revise, add, or remove factors as deemed appropriate considering evolving market dynamics. | Illustration above is for explanatory purposes only, assuming a maximum of 5X of base SIP amount.

SIP vs Power SIP performance of EEFI on different indices

3 Year Rolling XIRR

Indices	Normal SIP	Power SIP (5x)	Power SIP (10x)
Nifty 50	11.7%	13.8%	14.8%
Nifty 100	12.1%	14.2%	15.3%
Nifty Midcap 150	17.9%	20.6%	22.0%
Nifty L&M 250	14.9%	17.2%	18.5%
Nifty Small Cap 250	17.4%	20.6%	22.3%
Nifty 500	12.9%	15.1%	16.3%
Average Outperformance:		*2%-3%*	*3%-5%*

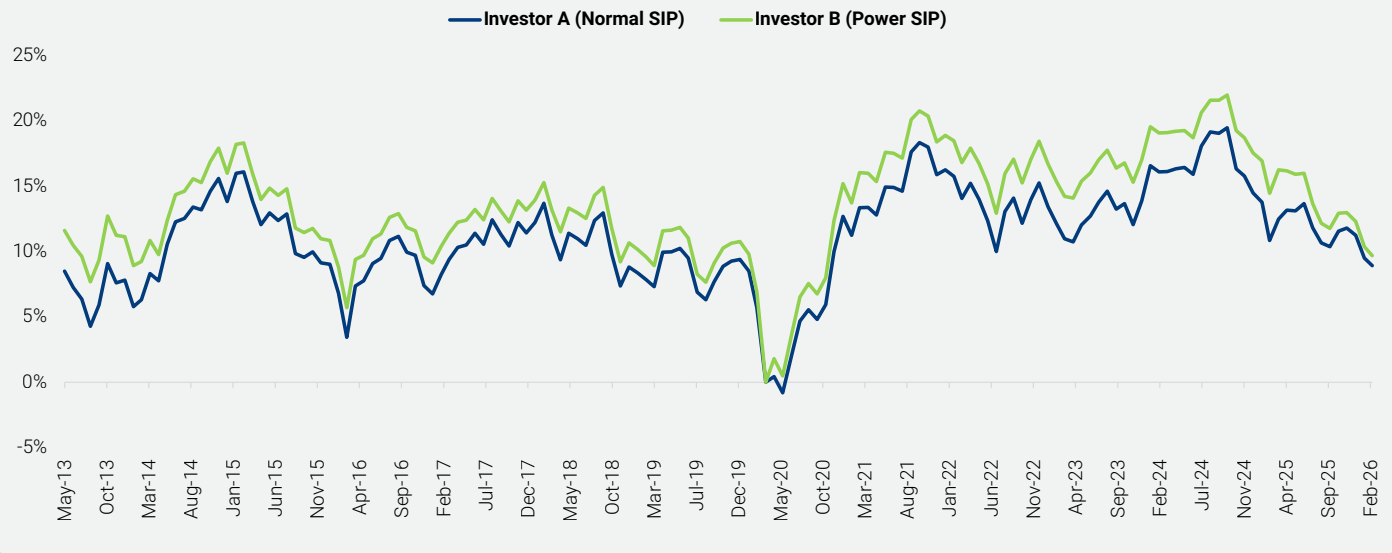
5 Year Rolling XIRR

Indices	Normal SIP	Power SIP (5x)	Power SIP (10x)
Nifty 50	11.2%	13.5%	14.4%
Nifty 100	11.5%	13.9%	14.8%
Nifty Midcap 150	17.0%	20.0%	21.3%
Nifty L&M250	14.2%	16.9%	18.0%
Nifty Small Cap 250	15.5%	19.0%	20.7%
Nifty 500	12.3%	14.8%	15.8%
Average Outperformance:		*2%-3%*	*3%-5%*

Source: Ace MF, Internal Analysis | Data as on Feb 28, 2026 | Investment of Rs. 10,000 per month in Nifty 50 considered for Normal SIP | For Power SIP, amount varies as per the Edelweiss Equity Fundamental Index (EEFI) which is an internal model of Edelweiss AMC | Period considered May 2008 to Feb 2026. Illustration above is for explanatory purposes only. Past performance may or may not be sustained in the future.

How is the installment amount determined?

100% outperformance observed for Power SIP for 5-year rolling SIP



Source: Ace MF, Internal Analysis | Data as on Feb 28, 2026 | Investment of Rs. 10,000 per month in Nifty 50 considered for Normal SIP | For Power SIP, amount varies as per the Edelweiss Equity Fundamental Index (EEFI) which is an internal model of Edelweiss AMC | Period considered May 2008 to Feb 2026. Past performance may or may not be sustained in the future. Illustration above is for explanatory purposes only, assuming a maximum of 5X of base SIP amount.

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