



**GO AHEAD.  
PLAN.**

**AXIS TRIPLE  
ADVANTAGE FUND**  
GOLD | EQUITY | FIXED INCOME

relax. IT'S AXIS.

**AXIS MUTUAL FUND**

## Build wealth no matter what is happening in the economy.

There are obviously no guarantees but you can maximise your chances of making money by investing in a diverse range of assets. By balancing your investments across multiple asset classes you tend to reduce risk of losing money to economic shocks (like the recent global financial crisis).

Empirical studies have shown that between 1995 and 2010, if you had invested equally in stocks, bonds and gold, only once would you have lost money i.e. in 1995.

Returns from asset classes				
Year	Stocks	Bonds	Gold	Average
1995	-23%	3%	14%	-2%
1996	-1%	13%	-3%	3%
1997	20%	24%	-14%	10%
1998	-18%	8%	8%	0%
1999	67%	16%	2%	29%
2000	-15%	13%	1%	0%
2001	-16%	25%	6%	5%
2002	3%	23%	24%	17%
2003	72%	12%	13%	33%
2004	11%	-1%	1%	3%
2005	36%	6%	22%	22%
2006	40%	6%	21%	22%
2007	55%	7%	17%	26%
2008	-52%	27%	31%	2%
2009	76%	-6%	19%	30%
2010	18%	6%	24%	16%

*This is historical data. Past performance may or may not be sustained in the future. Stocks are represented by the S&P CNX Nifty and Bonds by the I-Sec Sovereign Bond Index. Source of data: Bloomberg.*

What this means is that if you diversify your investments, you can avoid monetary surprises. If you have planned for something you should be able to get it.

## Axis Triple Advantage Fund - Go Ahead. Plan.

Axis Triple Advantage Fund helps you take advantage of diversification by investing in a mix of equity, fixed income and gold in the following proportions.

- Equity and Equity related instruments : 30-40%
- Debt and Money Market Instruments : 30-40%
- Gold Exchange Traded Funds : 20-30%

This not only helps avoid monetary surprises but also provides opportunity for wealth growth. With Axis Triple Advantage Fund, if you have planned for something, chances are you should be able to get it.

## Does diversification means lower growth?

Not necessarily. While diversification reduces risk levels, it needn't necessarily compromise on wealth creation. A simple illustration of the same is given in the table below.

₹ 100 invested in December 1994 grew to	
Stocks	₹ 519
Bonds	₹ 537
Gold	₹ 528
<b>Triple Asset</b>	<b>₹ 628</b>

*This is historical data for the period 31 Dec 1994 to 31 Dec 2010 and is rebased to 100. Past performance may or may not be sustained in the future. Stocks are represented by the S&P CNX Nifty and Bonds by the I-Sec Sovereign Bond Index. Triple Asset comprises of Stocks, Bonds and Gold weighted equally and rebalanced monthly.*

*Source of data: Bloomberg.*

## Doesn't lower risk always mean lower return?

A triple asset portfolio basically does well in minimizing any fall. Take a look at the table below and you will realize that as the extent of fall increases, the amount of gain required to make up for the fall increases faster. For example, a 50% fall in value of an investment means that the investment then has to grow 100% just to get back to its original value.

Loss	Gain required to make up the loss
5%	5.20%
10%	11%
25%	33%
50%	100%

Therefore if you can reduce the fall (as tends to be the case with a triple asset portfolio), the resultant gain is disproportionately higher over time.

## Key features

Type of Scheme	An open-ended hybrid scheme
Benchmark Index	35% - S&P Nifty Index + 35% - CRISIL Composite Bond Fund Index + 30% - INR Price of Gold
Fund Suitability	It is a medium risk fund suitable for investments for the long term.
Load Structure	Entry Load: Nil Exit Load: 1% if redeemed/switched out within 1 year from the date of allotment
Options	Growth and Dividend (Payout & Reinvestment)
Minimum Application Amount (for lumpsum applications)	₹ 5,000 and in multiples of ₹ 1 thereafter
Minimum Additional Purchase Amount	₹ 100 and in multiples of ₹ 1
Sleep in Peace (SIP) option*/ Systematic Transfer Plan (STP)/ Systematic Withdrawal Plan (SWP)	Available
EasyCall (phone based transaction)	Available

AXIS MUTUAL FUND HELPS YOU RELAX WITH,



- Simple website that makes investing really easy
- Invest online without any prior registration
- Complete your investment in less than 7 minutes
- Track your investments instantly

Risk  
Managed  
Products



Allows you to buy or sell without PINs or Passwords

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**Statutory Details:** Axis Mutual Fund, sponsored by Axis Bank Ltd., has been established as a Trust under the Indian Trusts Act, 1882, (liability restricted to ₹ 1 Lakh). **Trustee:** Axis Mutual Fund Trustee Ltd. **Investment Manager:** Axis Asset Management Co. Ltd. (the AMC)

**Risk Factors:** All Mutual funds and securities investments are subject to market risks and there is no guarantee that the investment objective of the scheme will be achieved. The NAV of the units issued by the Mutual Fund under the scheme can go up or down depending on various factors and forces affecting securities markets. Past performance of the Sponsor, its affiliates/the AMC/the mutual fund or its schemes does not indicate the future performance of the scheme. The sponsor is not liable or responsible for any loss or shortfall resulting from the operation of the scheme. Investments in the scheme are subject to various investment risks such as trading volumes, settlement risk, liquidity risk, default risk, risk of possible loss of principal, etc.

Equity and equity related instruments are volatile by nature. Investments in gold exchange traded funds are subject to market risk, risks associated with investment in physical gold, liquidity risk, counterparty risk, etc. For detailed risk factors, please refer to the SID. **Mutual Fund Investments are subject to market risks. Please read the Scheme Information Document and Statement of Additional Information (SID & SAI) carefully before investing.**

**Axis Triple Advantage Fund is only the name of the Scheme and does not in any manner indicate either the quality of the Scheme, its future prospects and returns. Investment objective:** To generate long term capital appreciation by investing in a diversified portfolio of equity and equity related instruments, fixed income instruments & gold exchange traded funds.

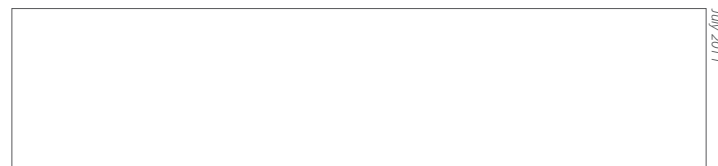
\* Refers to Systematic Investment Plan

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