

Smart**Edge** Plus

Presenting,

**Axis Intellect (**AI**) Score based Top Ideas**

## Axis Intellect (AI)

Balanced AI

Featured with a balanced multi-factor strategy approach that is suitable for all evolving market environments to get optimum potential returns while significantly reducing risk in the long term.

**Overview:** Stock investment endeavors to deliver consistent outperformance over the long term by making a diversified investment of 'Winners'.

The Axis Intellect AI score strategy adopts unique approach to deliver alpha by applying equal exposure to '**Core**' factors: **Value, Growth, Quality, Momentum.**

### Key features

- Consistently outperformed the benchmark with superior returns
- Superior risk-adjusted long-term returns
- Focus on risk management with Lower drawdown vs. the benchmark
- 1.9x returns from April'22 to Sep'25



## Our Unique Process Flow

Top 500 Universe

- Top 500 Stocks cover 94% of Indian Market cap

In House screening process

- Screening of 100 high 'Beta' companies from each sector
- Coverage Universe reduced to 400 Stocks

Axis Intellect Score: scoring and ranking

- Powerful Ranking & grading system to identify Core Factors rankings for the well known factors
- **Value, Growth, Quality, Momentum, Volatility & Beta**

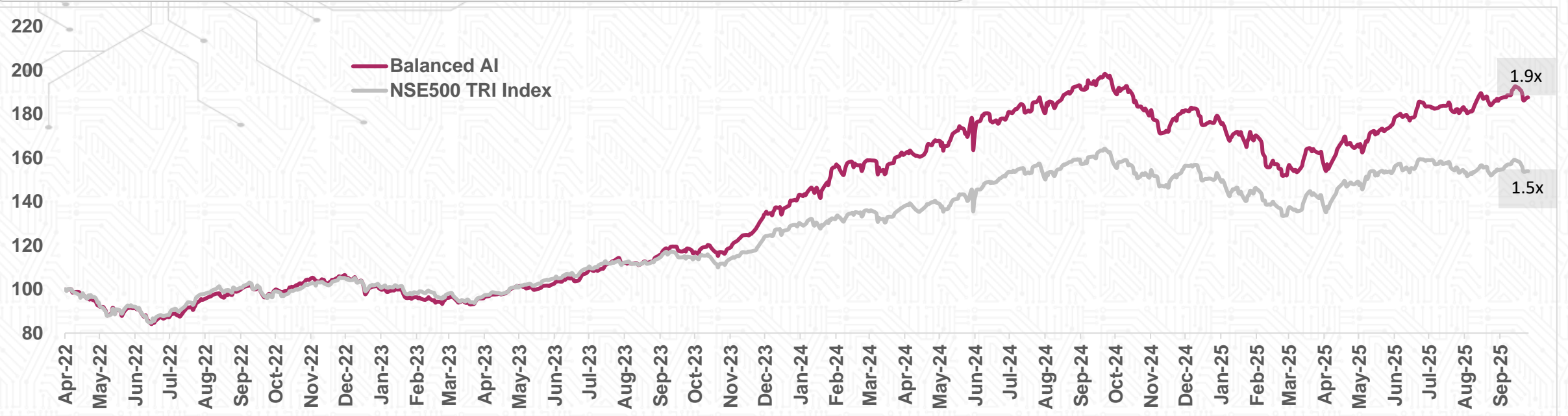
Optimal Strategy

- **Our Balanced Multi-factor Strategy will give equal exposure to all four market styles:** Value, Growth, Quality, and Momentum
- Our second model will identify top picks based on average 'AI score'

Investment suggestions

- Investment suggestion of ~20 Stocks
- Quantitative model focuses on low volatility stocks
- Quarterly review

## Balanced AI Live results of stock ideas



	Balanced AI	Nifty500 TRI
<b>CAGR (Inception)</b>	20.2%	13.4%
<b>Alpha</b>	6.8%	
<b>Stdev</b>	14.8%	13.7%
<b>Sharpe</b>	0.89	0.47
<b>Beta</b>	0.83	1.00
<b>Drawdown</b>	-23.4%	-18.6%

Returns (%)	Balanced AI Top pick ideas	Nifty500 TRI	Alpha
<b>1 Month Return</b>	1.9%	1.3%	0.6%
<b>3 Month Return</b>	1.3%	-3.4%	4.7%
<b>6 Month Return</b>	14.9%	7.3%	7.6%
<b>1 Year Return</b>	-4.6%	-5.3%	0.7%
<b>2 Year CAGR</b>	25.7%	15.8%	9.9%
<b>3 Year CAGR</b>	24.2%	16.4%	7.8%
<b>CAGR Since Inception</b>	20.2%	13.4%	6.8%

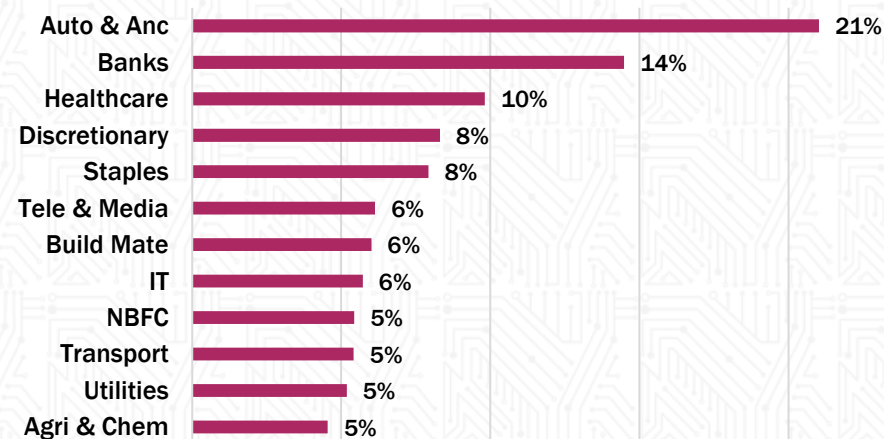
\*Note: Live performance since 6<sup>th</sup> April 2022 till 30<sup>th</sup> September 2025, Cost is not adjusted in returns



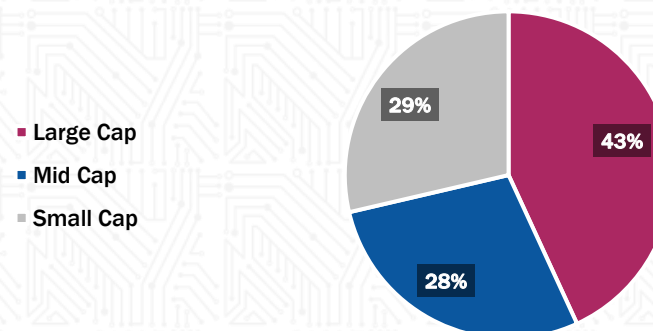
# Balanced AI: Top Picks

Stocks	Sector
Eicher Motors Ltd	Auto & Anc
Bharti Airtel Ltd	Tele & Media
J K Cement Ltd	Build Mate
HCL Technologies Ltd	IT
City Union Bank Ltd	Banks
Muthoot Finance Ltd	NBFC
Interglobe Aviation Ltd	Transport
Hyundai Motor India Ltd	Auto & Anc
J B Chemicals and Pharmaceuticals Ltd	Healthcare
Power Grid Corporation of India Ltd	Utilities
Karur Vysya Bank Ltd	Banks
Endurance Technologies Ltd	Auto & Anc
Lupin Ltd	Healthcare
Coromandel International Ltd	Agri & Chem
Hero MotoCorp Ltd	Auto & Anc
Indian Hotels Company Ltd	Discretionary
E I D-Parry (India) Ltd	Staples
Indian Bank	Banks
KPR Mill Ltd	Discretionary
Bikaji Foods International Ltd	Staples

## Sector Wise Stock ideas



## Market capitalization



### **Neeraj Chadawar** **Head of Research – Fundamental & Quant**

Neeraj has more than 14 years of professional experience with over 11 years as Equity Strategist for serving clients across Europe, Australia, and India. In his previous assignment, Neeraj worked as an Indian Equity Strategist for Institutional clients at PhillipCapital and was responsible to generate top-down and bottom-up investment ideas on sector rotation and theme-based ideas for the Indian market.

He has been voted among the Best Equity Strategists by Asia Money Poll 2018, 2019, and received Standard & Poor Bronze ACE award for customer focus in June 2013.

Neeraj is an Electronics & Communication engineer and studied at FORE School of Management where he earned his PGDM with a specialization in Finance & Marketing.

# LAST ONE YEAR TOP IDEAS

# Top Ideas as on 2<sup>nd</sup> May 2025

Company name	Mcap	Sector
ICICI Bank Ltd	Large Cap	Banks
Bharti Airtel Ltd	Large Cap	Tele & Media
United Spirits Ltd	Large Cap	Discretionary
Eicher Motors Ltd	Large Cap	Auto & Anc
Bajaj Finance Ltd	Large Cap	NBFC
Federal Bank Ltd	Mid Cap	Banks
J K Cement Ltd	Mid Cap	Build Mate
Gillette India Ltd	Small Cap	Staples
Muthoot Finance Ltd	Mid Cap	NBFC
Interglobe Aviation Ltd	Large Cap	Transport
Narayana Hrudayalaya Ltd	Mid Cap	Healthcare
J B Chemicals and Pharmaceuticals Ltd	Small Cap	Healthcare
Power Grid Corporation of India Ltd	Large Cap	Utilities
HCL Technologies Ltd	Large Cap	IT
Lupin Ltd	Large Cap	Healthcare
eClerx Services Limited	Small Cap	IT
Karur Vysya Bank Ltd	Small Cap	Banks
E I D-Parry (India) Ltd	Small Cap	Staples
Oberoi Realty Ltd	Mid Cap	Build Mate
Bikaji Foods International Ltd	Small Cap	Staples



# Top Ideas as on 4<sup>th</sup> February 2025

Company name	Mcap	Sector
Sun Pharmaceutical Industries Ltd	Large Cap	Healthcare
Dr Reddy's Laboratories Ltd	Large Cap	Healthcare
Coforge Ltd	Mid Cap	IT
Gillette India Ltd	Small Cap	Staples
Eicher Motors Ltd	Large Cap	Auto & Anc
Muthoot Finance Ltd	Mid Cap	NBFC
United Spirits Ltd	Large Cap	Discretionary
Interglobe Aviation Ltd	Large Cap	Transport
Power Grid Corporation of India Ltd	Large Cap	Utilities
HCL Technologies Ltd	Large Cap	IT
Petronet LNG Ltd	Mid Cap	Oil & gas
Mankind Pharma Ltd	Mid Cap	Healthcare
Karur Vysya Bank Ltd	Small Cap	Banks
Natco Pharma Ltd	Small Cap	Healthcare
eClerx Services Limited	Small Cap	IT
Bikaji Foods International Ltd	Small Cap	Staples
Shriram Finance Ltd	Large Cap	NBFC
E I D-Parry (India) Ltd	Small Cap	Staples
Oberoi Realty Ltd	Mid Cap	Build Mate
Oil and Natural Gas Corporation Ltd	Large Cap	Oil & gas

# Top Ideas as on 4<sup>th</sup> November 2024

Company name	Mcap	Sector
HCL TECHNOLOGIES LTD	Large Cap	IT
SUN PHARMACEUTICAL INDUSTRIES LTD.	Large Cap	Healthcare
COLGATE-PALMOLIVE (INDIA) LTD.,	Mid Cap	Staples
BHARTI AIRTEL LTD.	Large Cap	Tele & Media
MUTHOOT FINANCE LIMITED	Mid Cap	NBFC
CIE AUTOMOTIVE INDIA LIMITED	Small Cap	Auto & Anc
HERO MOTOCORP LIMITED	Mid Cap	Auto & Anc
LUPIN LTD	Mid Cap	Healthcare
INTERGLOBE AVIATION LIMITED	Large Cap	Transport
POWER GRID CORPORATION OF INDIA LIMITED	Large Cap	Utilities
KARUR VYSYA BANK LTD.	Small Cap	Banks
TATA MOTORS LTD.	Large Cap	Auto & Anc
PETRONET LNG LTD.	Mid Cap	Oil & gas
NTPC LIMITED	Large Cap	Utilities
BALRAMPUR CHINI MILLS LTD.	Small Cap	Staples
NATCO PHARMA LTD.	Small Cap	Healthcare
OIL AND NATURAL GAS CORPORATION LTD	Large Cap	Oil & gas
CUMMINS INDIA LTD.,	Mid Cap	Industrials
COAL INDIA LIMITED	Large Cap	Metals & min
BRIGADE ENTERPRISES LIMITED	Small Cap	Build Mate

# Top Ideas as on 1<sup>st</sup> August 2024

Company name	Mcap	Sector
HCL TECHNOLOGIES LTD	Large Cap	IT
SUN PHARMACEUTICAL INDUSTRIES LTD.	Large Cap	Healthcare
BHARTI AIRTEL LTD.	Large Cap	Tele & Media
COLGATE-PALMOLIVE (INDIA) LTD.,	Mid Cap	Staples
ZYDUS LIFESCIENCES LIMITED	Mid Cap	Healthcare
NARAYANA HRUDAYALAYA LIMITED	Mid Cap	Healthcare
HERO MOTOCORP LIMITED	Mid Cap	Auto & Anc
INTERGLOBE AVIATION LIMITED	Large Cap	Transport
BIKAJI FOODS INTERNATIONAL LIMITED	Small Cap	Staples
NTPC LIMITED	Large Cap	Utilities
TATA MOTORS LTD.	Large Cap	Auto & Anc
VARUN BEVERAGES LIMITED	Large Cap	Staples
POWER GRID CORPORATION OF INDIA LIMITED	Large Cap	Utilities
CUMMINS INDIA LTD.,	Mid Cap	Industrials
PERSISTENT SYSTEMS LIMITED	Mid Cap	IT
OIL AND NATURAL GAS CORPORATION LTD	Large Cap	Oil & gas
BANK OF BARODA	Large Cap	Banks
COAL INDIA LIMITED	Large Cap	Metals & min
BRIGADE ENTERPRISES LIMITED	Small Cap	Build Mate
NHPC LIMITED	Mid Cap	Utilities



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