

Media Release

Kotak Securities launches three new ‘Ace Portfolios’ for Investors

Mumbai, 25th August, 2021: Kotak Securities (KSL) today announced the launch of three new “Ace Portfolios” – a collection of curated ‘smallcase’ portfolios for retail investors. In addition to the existing ‘smallcase’ strategies available on the Kotak Securities investment platform, investors can now invest more intelligently through the three new “Ace Portfolios”. ‘Smallcases’ are portfolios of stocks and ETFs based on specific themes and strategies. These portfolios have been created by specialised research analysts.

Of the three new ‘Ace Portfolios’ – one is curated by Abakkus Asset Manager LLP (an investment advisory firm founded by Sunil Singhanian), and the other two portfolios are curated by the Kotak Securities’ in-house research team. The ‘Abakkus Smart Premier League’ is a curated portfolio that helps generate alpha and risk adjusted returns for investors by creating a benchmark agnostic portfolio predominantly within the Top-250 listed companies. Kotak Securities’ own portfolios are ‘The Wall’, which provides recommendations of high Return on Equity (RoE) companies with strong corporate governance standards and ‘Master Blaster’ – a basket of large-cap stocks with diversified sectoral exposure.

Jaideep Hansraj, MD & CEO, Kotak Securities said, “We believe in adding value for investors and the introduction of a new range of ‘Ace Portfolios’ will help our investors to make intelligent decisions while investing in select portfolios. The insights that the ‘Ace Portfolios’ offer are well researched and will provide an edge to investors on the Kotak Securities’ platform.”

Sunil Singhanian, Founder - Abakkus Asset Manager LLP added, “We are excited to be the first to launch Advisory services to 23 lakh customers of Kotak Securities”.

The research teams that have constructed these portfolios employ strategies including asset allocation, factor investing, corporate governance, value and momentum strategies. These portfolios are curated investment recommendations by established Registered Investment Advisors and Research Analysts and come with a nominal fee for all users of Kotak Securities’ investing platform. The recommendations will be reviewed regularly by the managers ensuring that the portfolio continues to reflect the underlying strategy.

About Kotak Securities Limited

Kotak Securities Limited (KSL), a subsidiary of Kotak Mahindra Bank, is one of India’s largest full-service stock broking firms catering to retail and institutional investors across all segments of the capital market. Through a tie-up with partner brokers, the company also provides direct access to the US markets. Supported by a strong research team, robust digital trading platform, large branch network & franchisee base, and referral coordinators spread across *Kona Kona* of India, KSL processes lakhs of

secondary market trades every day. As on 30th June 2021, KSL has a national footprint of 152 branches and 1,510 franchisees & satellite offices across 360 cities in India serving 23 lakh customers. KSL provides a wide array of services including investment options in equities, derivatives (equities, commodities, currency) and mutual funds. It also offers margin trade funding, depository services and third-party products like insurance.

For more information, please visit the company's website at <https://www.kotaksecurities.com>

For further information, please contact:

Phiroza Choksi Kotak Mahindra Group Phone: +91 98203 63681 Phiroza.Choksi@kotak.com	Biswajit Dash Kotak Mahindra Group Phone: +91 91670 44405 Biswajit.dash@kotak.com	Rakesh Sharma Fortuna PR Phone: +91 98335 37679 Rakesh@fortunapr.com	Prasanna Deshpande Fortuna PR Phone: +91 98206 79088 Prasanna@fortunapr.com
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