

# Citrus Sector Leaders Fund

Strategy:- Equity

## INVESTMENT OBJECTIVE

The goal is to generate wealth and alpha for clients vis-a-vis the benchmark by making investments in Equity Asset Class over a long term horizon (at least 3+ years). It is a concentrated portfolio of 25 to 35 stocks with at least 60% exposure to Large Cap stocks. Investment approach is Top-Down in nature with focus on winning sectors and stock selection within the favorable sectors.

## SNAPSHOT

Portfolio Manager - Mr. Sanjay Sinha

Name - Citrus Advisors Private Limited

Inception Date - 30th August 2023

SEBI Registration Number - INP000008206

## RATIOS

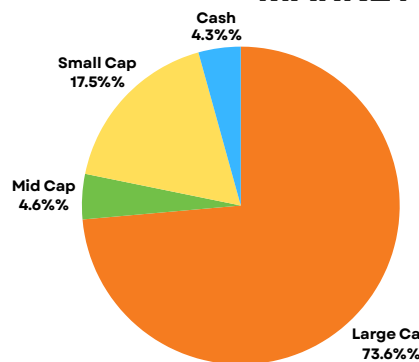
Standard Deviation	0.71%
Downside Deviation	0.70%
Upside Deviation	0.51%

## PORTFOLIO

### Top Holdings

Company	Weight (%)
ICICI Bank Ltd	5.57%
Reliance Inds Ltd	4.91%
HDFC Bank Ltd	3.69%
State Bank of India	3.55%
Adani Ports & SEZ	3.55%

## MARKET CAP ALLOCATION



Large Cap	73.6%
Mid Cap	4.6%
Small Cap	17.5%
Cash	4.3%
Total	100.0%

## SECTOR WEIGHT

Industry	Weight (%)
Financials	21.12%
Industrial	11.32%
Auto & Ancillaries	8.64%
Power & Ancillaries	8.47%
IT Services	7.36%

Returns	1 Month	3 Month	6 Month	1 Year	3 Year	Since Inception
Sector Leaders	-11.2	-13.8	-10.1	0.8	13.8	10.9
Nifty 50 TRI	-11.3	-14.4	-9.0	-4.0	10.0	10.2

Returns as of March 31st 2026. Please note returns above 1 year are annualised returns; returns below 1 year are absolute returns  
Inception Date: 24th March 2021

### Disclaimer

Equity Investments are related to Market risks.

Returns of individual clients may differ depending on time of entry in the Strategy.

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

Performance related information provided herein is not verified by SEBI.