

Checklist of items

1. About Us – K-fin needs to Edit
 - a. About AMC
 - i. Vision & Mission
 - ii. Philosophy
 - b. Team – K-fin needs to Edit
 - c. Board of Directors – Will give inputs later
 - d. About Sponsor – K-fin needs to Edit
2. Our Funds
 - a. Capitalmind Flexi Cap Fund - K-fin needs to Edit
 - b. Capitalmind Liquid Fund - K-fin needs to Edit
3. Knowledge Center
 - a. Videos - K-fin needs to Edit
 - b. Podcast - K-fin Need to Edit
 - c. Investor Education - Need to Edit
 - d. Tools & Calculators - Will give inputs later
 - e. e-KYC - OK
 - f. FAQ - OK
4. Downloads
 - a. NFO OK
 - b. Investor OK
 - i. Monthly Factsheets (placeholder)
 - ii. Portfolio Disclosure (placeholder)
 - iii. Fortnightly Debt Portfolio Disclosure (placeholder)
 - iv. KIM, SID and SAI (placeholder)
 - c. Statutory Disclosures OK
 - d. Policies OK
 - e. Distributors OK
 - f. NCT – Forms OK
5. Investor Center
 - a. MF Scheme List - K-fin needs to Edit – take reference from “Our Funds” page
 - b. RTA Branch Details - OK
 - c. Feedback Form - OK
 - d. Queries and Complaints K-fin needs to Edit - (Example)

6. Contact - K-fin needs to Edit the contact person name as below
 - a. For Grievance: Nihit Kshatriya, Head of Investor Relations

1. About Us

b. About AMC

At Capitalmind, we are dedicated to revolutionizing the way Indians grow and manage their wealth. As India's premier wealth management firm, we are our clients' most trusted partner, providing investment portfolios built on rigorous analysis and expertise.

The story behind Capitalmind

Transform your wealth with trusted expertise

With a proven track record, we're the chosen stewards for hundreds of individuals, families and businesses, dedicated to realizing their financial vision.

Our Investing Philosophy

Disciplined Process Over Prediction

We believe there is folly in making bold short-term predictions. We implement an evidence-based investment process founded on wisdom accrued from experience, rigorous data analysis, and rational decision-making.

Consistency for the long run

Genuine skill reveals itself through steady excellence over market cycles, not fleeting victory during isolated periods. A superior record is built, not from soaring one year and crashing the next but from a resilient approach that offers conviction for building long term wealth.

Intelligent Risk-taking

Risk, the permanent loss of capital, is intrinsic to investing. So we seek to understand and manage risk, guard against avoidable dangers, stay nimble, and when called for, take decisive action.

Constant Learning and Evolution

We resist adherence to any one investment dogma, approach or legacy rule-of-thumb. Our investment approach continuously adapts as we expand our capabilities, insights and access to new opportunities.

c. Team

Take photos from ([this link](#)) and keep blank wherever you don't find a photo.

Name	Designation
Deepak Shenoy	CEO
Vashistha Iyer	Associate Director - AMC
Anoop Vijaykumar	Fund Manager & Head of Research
Varun Mishra	Head of Operations
Nihit Kshatriya	Head of Investor Relations & Partnerships
Shivam Bose	Head of Risk
Naganandan RM	Head of Compliance

d. About Sponsor

Since 2014 Capitalmind has made investing accessible for Indian investors by cutting through the jargon and uncomplicating the things that matter most. We live by the simple maxim that we only offer what we would be confident investing in for ourselves and our family.

2. Our Funds

Capitalmind Flexi Cap Fund

A dynamic equity mutual fund that employs a quantitative strategy to invest in stocks across market capitalizations, focusing on companies exhibiting strong price momentum.

Name of the Scheme: Capitalmind Flexi Cap Fund

Type of the scheme: Open-ended dynamic equity scheme investing across large cap, mid cap, small cap stocks.

Date of Allotment: <Pending>

Min. Application Amount

- New Purchase: ₹ 500
- Add'l. Purchase: ₹ 500
- Monthly SIP: ₹ 500
- Quarterly SIP: ₹ 500

Expense Ratio: 1%

Fund Manager: Anoop Vijaykumar

Buttons: Buy Now, Daily NAV, Factsheet, Portfolio Disclosure, Transaction Timelines,

Capitalmind Liquid Fund

A short-term debt mutual fund that focuses on preserving capital and providing liquidity by investing in government bonds

Name of the Scheme: Capitalmind Liquid Fund

Type of the scheme: An Open ended Liquid scheme. A Relatively Low Interest Rate Risk and Relatively low Credit Risk.

Date of Allotment: <Pending>

Min. Application Amount

- New Purchase: ₹ 500

- Add'l. Purchase: ₹ 500
- Monthly SIP: ₹ 500
- Quarterly SIP: ₹ 500

Expense Ratio: 1%

Fund Manager: Anoop Vijaykumar

Buttons: Buy Now, Daily NAV, Factsheet, Portfolio Disclosure, Transaction Timelines,

3. Knowledge Center

<Use thumbnails and images from this link to create icons for this page. Or use any other design that is suitable>

Videos

- [A Structured Approach to Cash Calls: Deepak Shenoy's Framework](#)
- [Everything you need to know about Momentum Investing in India](#)
- [A FIRE-Side Chat with Vishal Jain - CEO of Zerodha Fundhouse](#)
- [Super-money: Why everyone wants to be everything in Finance](#)
- [A Deeper Look into Asset Management in India](#)

Podcast

- [Mutual Funds, PMS, or AIF: Choosing the Right Investment Vehicle for Your Needs](#)
- [What is front running, really?](#)
- [Why do financial markets have circuit limits?](#)
- [A Deeper Look into Asset Management in India](#)
- [The F&O Game is fair even if 93% of people lose money](#)

Investor Education

- [Stop Predicting, Start Responding: Mastering Market Uncertainty with Deepak Shenoy](#)
- [Equity Markets Don't Really Care About the Budget](#)
- [How money gets created in India](#)
- [How to invest a lumpsum amount?](#)
- [Stock market returns are lumpy. Get used to it](#)
- [Here's why taxes impact your investing decisions](#)
- [How does short selling work?](#)
- [What you know about inflation might be wrong](#)
- [Term Insurance - Why and when do you need it?](#)
- [Money, after you die](#)

