Bajaj Finserv Business Cycle Fund

Bajaj Finserv Mutual Fund · Equity · Thematic (business cycle)

Opens 20 Nov 2026 · closes 4 Dec 2026

20 Nov 2026	4 Dec 2026	₹500	Awaited
OFFER OPENS	OFFER CLOSES	MINIMUM	ALLOTMENT

What the scheme does

To generate long term capital appreciation by investing in equity and equity related securities of companies with a focus on riding business cycles through allocation between various sectors and stocks at different stages of business cycles.

An open ended equity scheme investing in a business cycles based theme. It allocates across sectors and stocks according to the stage of the business cycle and is benchmarked to the BSE 500 TRI.

Scheme details

Category	Equity · Thematic (business cycle)
Benchmark	BSE 500 Total Return Index (TRI)
Exit load	1% of applicable NAV if redeemed/switched out within 3 months of allotment; nil thereafter
Fund managers	Sorbh Gupta (equity), Bharat Hegde (associate fund manager, equity), Siddharth Chaudhary (debt)
Plans and options	Regular and Direct plans; Growth and IDCW options (IDCW payout, reinvestment and transfer sub-options)
Riskometer	Very High

Offer documents

Scheme Information Document (AMFI) ↗ portal.amfiindia.com

Fund page (AMC) ↗ bajajamc.com

Scheme Information Document (AMC) ↗ media.bajajamc.com

Key Information Memorandum ↗ media.bajajamc.com

Fund presentation ↗ media.bajajamc.com

Equity Compass – business cycle explainer (AMC) ↗ media.bajajamc.com

Statement of Additional Information – Bajaj Finserv MF ↗ media.bajajamc.com

Links open at the original publisher (the fund house or exchange where available), so you read the current version.

BEFORE YOU INVEST IN ANY NFO

- Read the SID and KIM. They govern over any summary, including this one.
- A new fund has no track record and no NAV history of its own.
- ₹10 a unit is a starting price, not a discount. NAV level says nothing about value.
- Look at how it fits with what you already hold, especially funds in the same category.

HOW TO INVEST THROUGH TRUSTNER

1. Request at **merasip.com/funds/nfo/bajaj-finserv-business-cycle** or WhatsApp 60039 03737.
2. Our team checks your KYC and answers your questions.
3. You receive a transaction link for the Regular plan and approve it yourself. Money goes from your bank straight to the fund house.

Source. SID (AMFI portal), AMFI NFO API, bajajamc.com fund page and downloads page; checked 17 Nov 2026.
This summary is prepared from the fund house's offer documents or, where those were not yet posted, published NFO announcements, for information. It is not investment advice or a recommendation to invest in the scheme. We distribute Regular plans and receive commission from fund houses. Mutual fund investments are subject to market risks. Read all scheme-related documents carefully before investing.
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