



**Zerodha  
Fund House**

**((●)) NFO Live**

# **A Satellite To Core Portfolios**

Introducing

**Zerodha Nifty MidSmallcap400  
50:50 Index Fund**



Broad Based Exposure To

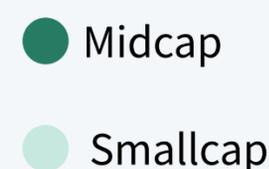
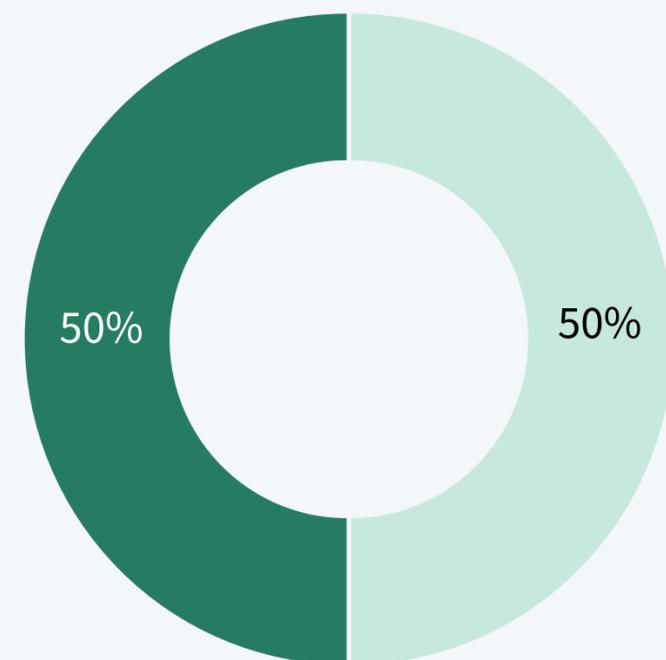
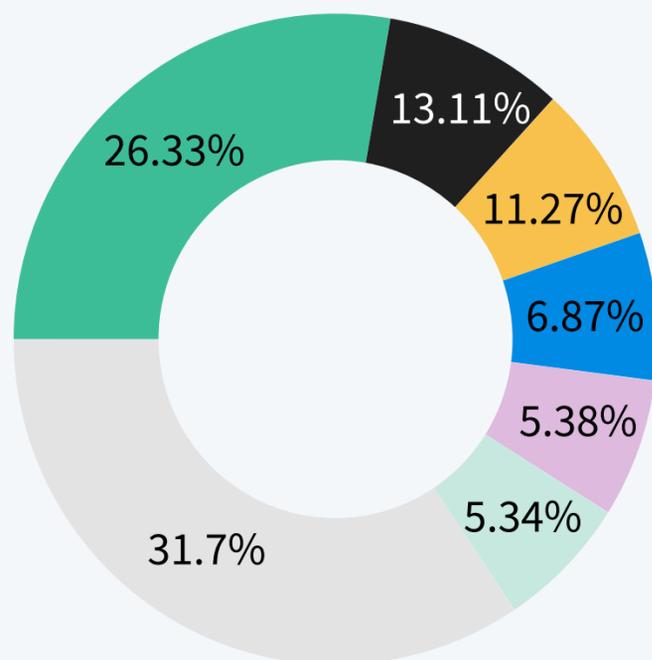
# Both Mid and SmallCap Segments Of the Indian Market

The **Zerodha Nifty Midsmallcap400 50:50 Index Fund** tracks the performance of 150 midcap and 200 smallcap companies part of a diversified index

Diversified across 20 Sectors

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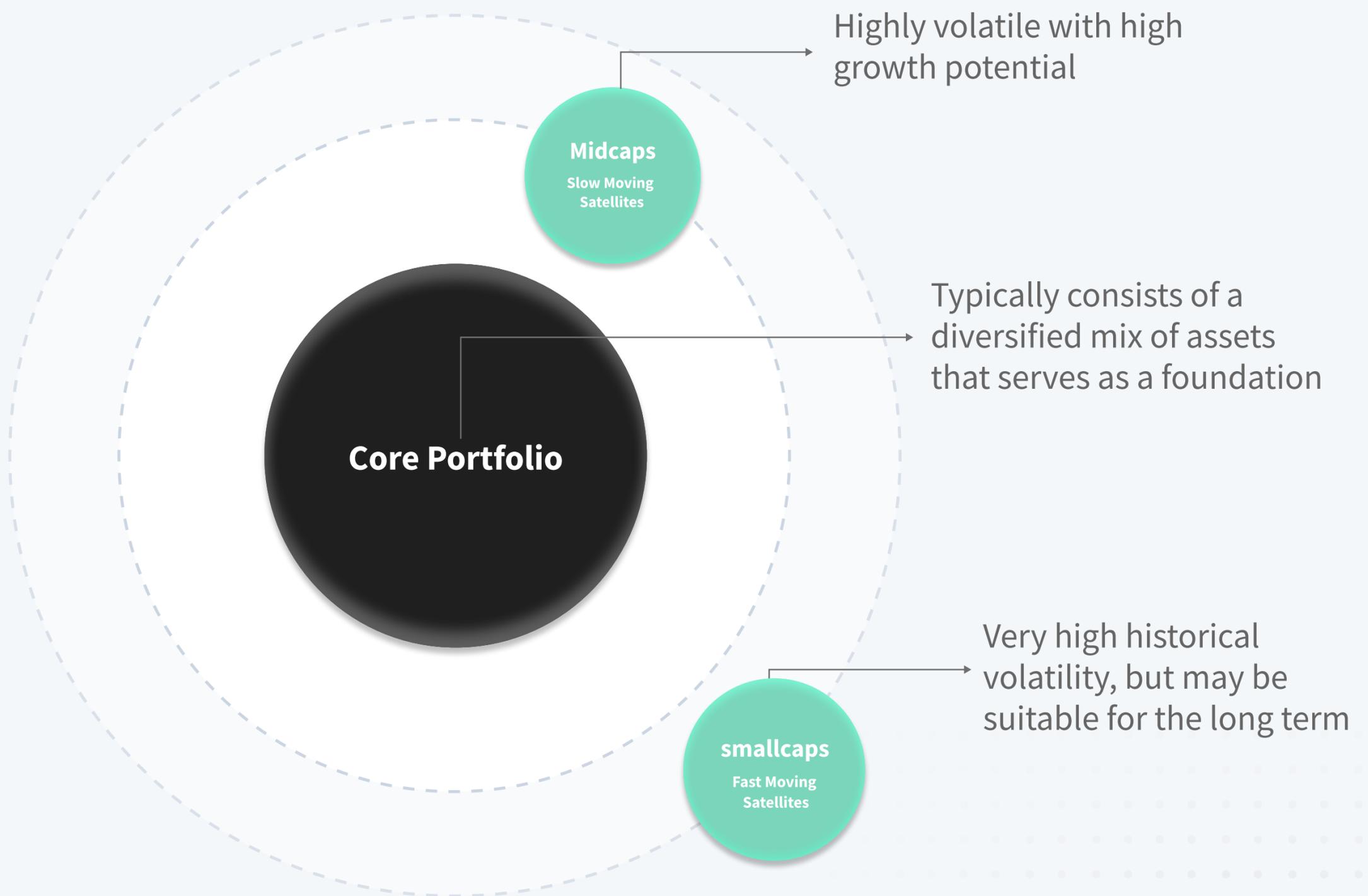
Equally across Market Caps





# A Satellite To Core Portfolios

While your core portfolio may serve as a foundation, satellite provides a more tactical opportunity at higher risk, which is where mid and small-caps might belong



Source for CAGR and Volatility: [Nifty Smallcap 250 TRI Factsheet](#), [Nifty Midcap 150 TRI Factsheet](#), [Nifty 100 TRI Factsheet](#) - Feb 2026

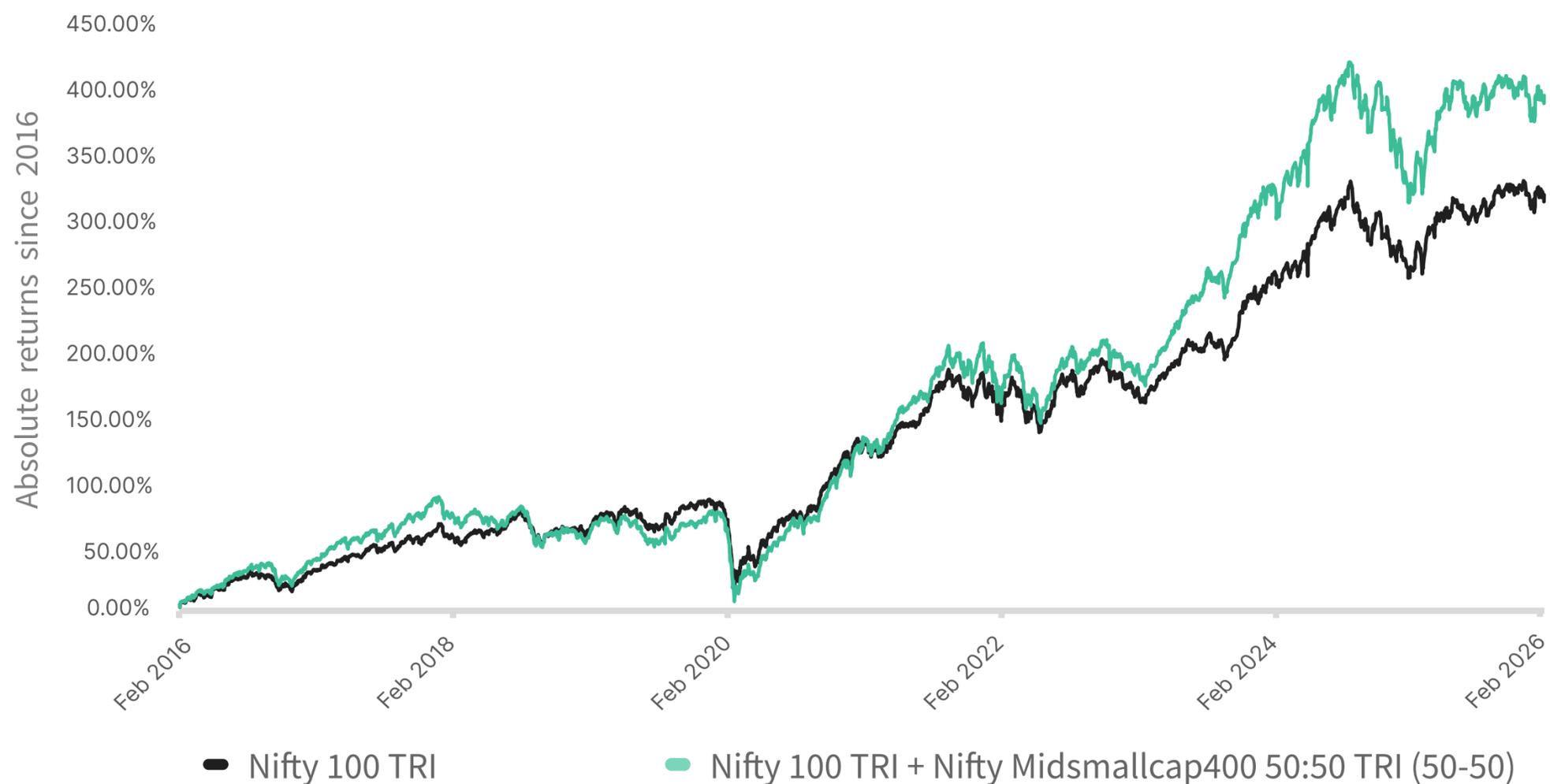
Fast Moving Satellites - These assets are historically more volatile and riskier than the slow moving satellites and core assets

Slow Moving Satellites - These assets are more volatile and riskier than the core assets, but may also have the potential to generate higher returns than the core assets



# Diversify Your Equity Holdings Beyond LargeCaps

A portfolio of large cap and midsmallcap 400 50:50 combined equally, has historically offered better risk-adjusted returns compared to just a pure large-cap portfolio



## Nifty 100 TRI

5 Year Risk-Adjusted Returns 0.94

10 Year Risk-Adjusted Returns 0.93

## Higher Risk-Adjusted Returns

### Nifty 100 TRI + Nifty Midsmallcap400 50:50 TRI (50-50)

5 Year Risk-Adjusted Returns 1.10

10 Year Risk-Adjusted Returns 1.02

Total Return Index (TRI) data for all indices has been sourced from the [Nifty Indices website](#), for the period Feb 29, 2016 to Feb 28, 2026.

Absolute return figures are based on internal calculations. CAGR and Volatility figures are based on internal calculations - using which Risk-Adjusted Returns are calculated.

Past performance is not an indicator of future returns. Past performance may and may not sustain in future.

The data shown above pertains to the Index and does not in manner indicate performance of any scheme of the Fund.

The above portfolio is hypothetical and illustrative in nature, constructed using a combination of Nifty 100 TRI and Nifty Midsmallcap400 50:50 TRI. It does not represent any existing scheme or actual investor portfolio. Past performance data is provided solely to demonstrate the concept and should not be relied upon as a basis for investment decisions.



Invest Via Both SIP & Lumpsum

# Zerodha Nifty MidSmallcap400 50:50 Index Fund

Min Investment Amount

**₹100**

Lock-in Period

**No**

Short-term capital gains

Taxed **at 20%**



For investment period  $\leq$  12 month, gains are treated as short-term capital gains & taxed at 20% (plus 4% cess and surcharge, if any)

Long-term capital gains

Taxed **at 12.5%**



For investment period  $>$  12 month, gains are treated as long-term capital gains and are tax-free upto ₹1.25 lakhs in a financial year. Gains above ₹1.25 Lakhs in a financial year are taxed at 12.5% (plus 4% cess and surcharge, if any).



Available on

# All major platforms



Coin



Groww



Dhan



ET Money



Paytm Money



IND Money



5 Paisa



MFU



CAMS online

and more...

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We've always believed that investing should be simple and accessible. A lot of India's growth story is still unfolding beyond the top 100 companies - and the **ZeroDha Nifty MidSmallcap400 50:50 Index fund** is our way of making that accessible to every investor.

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**Vishal Jain**

CEO, ZeroDha Fund House

# Zerodha Nifty MidSmallcap400 50:50 Index Fund



(An open-ended scheme replicating/tracking the Nifty MidSmallcap400 50:50 Index - TRI)

This product is suitable for investors who are seeking\*

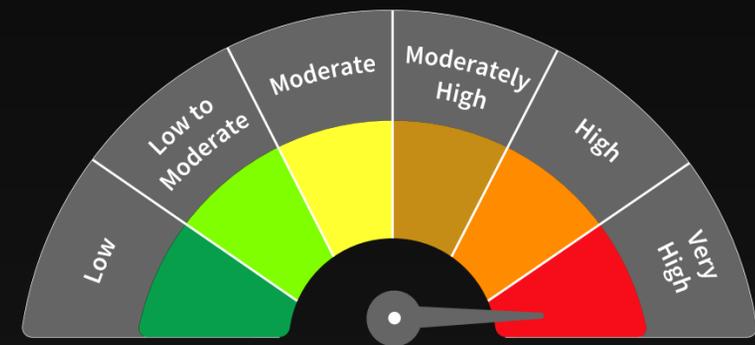
Long Term Capital Growth

Investment in equity and equity related securities covered by Nifty MidSmallcap400 50:50 Index

Risk-o-meter of the scheme



Risk-o-meter of the Benchmark  
(Nifty MidSmallcap400 50:50 Index TRI)



Investors should understand that their principal will be at **Very High Risk**

*\*Investors should consult their financial advisers if in doubt about whether the product is suitable for them.*

*The product labelling assigned during the New Fund Offer (NFO) is based on internal assessment of the scheme characteristics or model portfolio and the same may vary post NFO when actual investments are made.*

*(Offer for face value of ₹10/- per unit during New Fund Offer and at continuous offer for units at NAV based prices)*

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