

SIF Framework

A Structured Approach to 7 Strategies



SEBI permits seven distinct strategy types, grouped into three broad categories, each designed to cater to different investment approaches and risk appetites.

A **EQUITY-ORIENTED STRATEGIES** **EQUITY STRATEGIES** For growth with tactical downside management

1 Equity Long-Short Fund

Minimum 80% allocation to equity and equity related instruments

Up to 25% unhedged short exposure via derivative position in equity and equity related instruments

Flexibility to explore opportunities across market caps

2 Equity Ex-Top 100 Long-Short Fund

Minimum 65% in stocks beyond the top 100 companies

Up to 25% short exposure through unhedged derivative positions in equity and equity related instruments of other than large cap stocks

Focus on broader market opportunities beyond large caps

3 Sector Rotation Long-Short Fund

Minimum 80% in up to 4 sectors

Up to 25% short exposure through unhedged derivative positions in equity and equity related instruments at sector level

Actively allocate to sectors based on market outlook

B **DEBT-ORIENTED STRATEGIES** **DEBT STRATEGIES** For credit + interest rate positioning

1 Debt Long-Short Fund

Invests primarily in debt instruments across duration

Can take short positions through unhedged using debt derivatives up to 25%

Seeks to benefit from interest rate movements and credit trends

2 Sectoral Debt Long-Short Fund

Exposure to at least 2 debt sectors

Maximum 75% allocation per sector

Up to 25% short exposure through unhedged derivative positions in debt instruments

Enables tactical positioning across fixed income segments

C **HYBRID STRATEGIES** **HYBRID STRATEGIES** For flexibility across asset classes

1 Active Asset Allocator Long-Short Fund

Dynamically allocates across equity and debt derivatives, REITs/InVITs and commodity derivative

Up to 25% short exposure through unhedged derivative positions in equity and debt instruments

Designed for flexible, all-weather positioning

2 Hybrid Long-Short Fund

Minimum 25% allocation each to equity and debt

Up to 25% short exposure through unhedged derivative positions in equity and debt instruments

Balanced approach with enhanced return potential

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Source: HSBC Asset Management India (HSBC Asset Management (India) Private Limited)

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Investments in Specialized Investment Fund involves relatively higher risk including potential loss of capital, liquidity risk and market volatility. Please read all investment strategy related documents carefully before making the investment decision.