

What is Marathon Trends?

Marathon Trends strategy offers a distinctive investment approach, blending the strengths of Fundamental and Technical analysis. It strives to acquire fundamentally sound stocks while leveraging technical analysis for optimized entry and exit points, maximizing investment returns



Investment Universe, Process & Strategy

Investment Universe: Product selects from the top 300 Quality liquid stocks across Large, Mid, and small-cap segments, aiming for smooth entry and exit with minimal impact costs.

Strategy: We follow the principle of "cutting losses and letting profits run," prioritizing risk management and nurturing winning positions. Our process includes a highly disciplined selling approach, which is often a challenge for many investors. However, our strength lies in our unwavering discipline in executing sell decisions.

Process: Product initially identifies the top 300 liquid stocks. Subsequently, fundamental analysis is done to pinpoint high-quality stocks with strong long-term earnings and recent growth acceleration. Further filtering is done through Technical analysis, resulting in 20-25 stocks exhibiting favourable & consistent price momentum. Strategy exit positions upon observing a reversal in both earnings and price trends.

This distinctive strategy synergizes the strengths of Fundamental and Technical analysis. By combining a deep understanding of company fundamentals with comprehensive knowledge of technical indicators, the product identifies quality stocks and adeptly adapts to market dynamics, ensuring timely responses to changes in the investment landscape.

This strategy remains flexible across sectors and market caps, effortlessly aligning with broader trends. It incorporates an inherent refresh mechanism, regularly replacing underperforming stocks in the portfolio with newer ones exhibiting stronger trends. This ensures adaptability and enhances the strategy's ability to capture favourable market conditions.

Rebalancing Strategy

The strategy focuses on replacing underperforming stocks in the portfolio with emerging trends, maintaining an optimal balance between minimizing churn and ensuring a trending portfolio. This process is carefully timed to strike the right balance for portfolio adjustments.

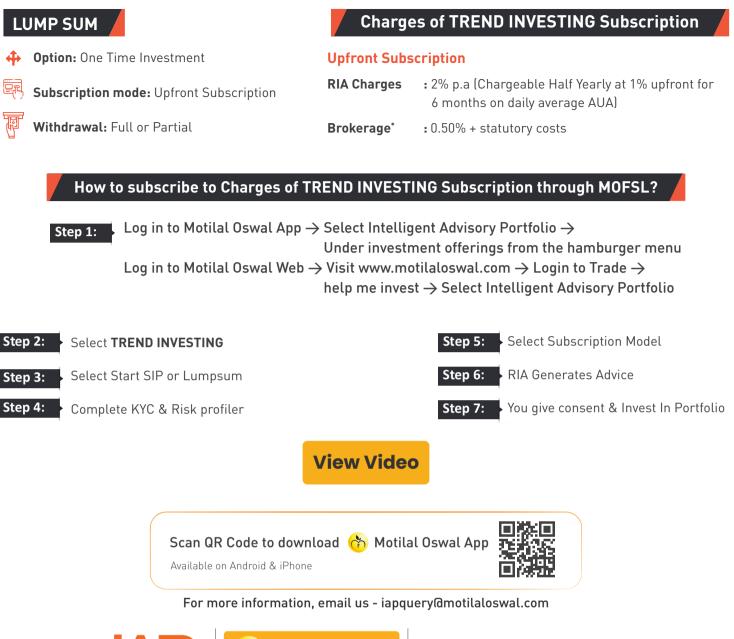
Basic Details

NO. OF STOCKS 20-25

BENCHMARK BSE 500

RISK Aggressive TIME FRAME 3-5 years





Charged by MOFSL



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