

for immediate use **PRESS RELEASE****Energy and Resources Sector Poised for Long-Term Growth: Tata Asset Management**

Indore, 18th September 2024: The energy and resources sector is undergoing a transformative phase. The performance of the energy sector is significantly influenced by the government's increased budget allocations towards infrastructure, particularly in power distribution and renewable energy projects. Public-private partnerships (PPPs) have accelerated the execution of large-scale initiatives. Schemes like the Pradhan Mantri Suryodaya Yojana and incentives for renewable energy projects continue to drive significant investments. Moreover, the government's push towards domestic manufacturing through the Production-Linked Incentive (PLI) scheme and the shift toward de-risking supply chains away from China are boosting the demand for energy.

In addition to these policy measures, the sector is also benefiting from rising energy demand, driven by a growing population, rapid urbanization, and industrial recovery. The installed renewable power generation capacity has increased at a fast pace over the past few years, posting a CAGR of 15.4% between FY16 and FY23. (Source: Ministry of New and Renewable Energy, Central Electricity Authority (CEA), IBEF, Greenpeace India)

India ranks 4th globally in installed renewable energy capacity, with solar and wind energy contributing more than 50% of India's total renewable capacity. The share of renewable energy in the total generation mix is expected to rise from 18% to 44% by 2030, while the share of thermal energy would reduce from 78% to 52%. (Source: Invest India, BP Statistical Review World Energy 2020, CEA, News Articles, Ministry of Power, IHA, IBEF)

TATA ASSET MANAGEMENT PRIVATE LIMITED

1903 B-Wing Parinee Crescenzo G-Block Bandra Kurla Complex Bandra East Mumbai 400 051
Tel 91 22 6657 8282 Fax 91 22 6617 8288
e-mail service@tataamc.com website www.tatamutualfund.com
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Satish Mishra, Fund Manager, Tata Asset Management said: “The energy sector is set for long-term expansion, fuelled by robust domestic demand, proactive government initiatives, and the global transition towards renewable energy. With renewable capacity, particularly in solar and wind, set to rise significantly, alongside stable demand for traditional energy sources like petroleum and natural gas, the sector is poised for a balanced expansion. This growth is driven by increased industrial and residential consumption, positioning the energy sector as a key driver of India's future economy.”

The Tata Resources & Energy Fund has added a cyclical bet to other sectors - like chemicals and metals & mining - as a value addition to the energy theme.

As the 6th largest chemical producer globally and 3rd in Asia, the chemical sector contributes 7% to India's GDP and 12% to its total exports, with 100% FDI allowed under the automatic route. (Source: IBEF, Invest India) Within this, speciality chemicals are expected to grow at a CAGR of 11.5% by 2027, while agro-chemicals and petrochemicals are projected to grow at 8.3% and 11%, respectively, during the same period. On the metals front, India's steel production could surge to 500 million tonnes by 2050—nearly four times the current output. Meanwhile, aluminium demand is expected to double to 9 million metric tons by 2033, driven by urbanization and rising needs in infrastructure, automotive, aviation, defence, and power sectors. (Source: Aluminium Association of India, EIU, ICRA, Ministry of Mines, Care Ratings, Indian Bureau of Mines) The shift towards electric vehicles (EVs) will further boost demand for aluminium, benefiting producers as EVs become a cornerstone of India's industrial and transportation future.

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“Given the sector's strong performance, a thoughtful portfolio allocation becomes crucial. A balanced exposure of 15-20% to the energy sector allows investors to benefit from both the ongoing growth in traditional energy sources and the rapid expansion in renewables, while also capturing the upside from government-led infrastructure initiatives,” added Mr Mishra.

Over the last 5-year period, Tata Resources & Energy Fund has delivered a return of 28.25% vis-à-vis the respective benchmarks of Nifty Commodities TRI-26.91% and Nifty 50 TRI-19.37%, and it has achieved a 44.39% return in the last one-year period, as of Aug 31, 2024, vis-à-vis the respective benchmarks of Nifty Commodities TRI-53.46% and Nifty 50 TRI-32.64%. This fund offers comprehensive exposure to the entire energy spectrum, positioning it well to capitalize on the rising demand for electricity in India. The portfolio includes companies involved in coal production, oil exploration, transportation, and distribution, as well as gas generation and distribution on the conventional energy front. On the renewable side, it covers firms working in solar, wind, hydro, and energy derived from agricultural and domestic waste. Additionally, it encompasses companies across the power generation, transmission, and distribution sectors.

Sources: AMFI latest available data 31st August 2024 and Internal Data

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TATA

RESOURCES & ENERGY FUND

(An open-ended equity scheme investing in Resources & Energy Sector)

This product is suitable for investors who are seeking*:

- Long Term Capital Appreciation.
- Investment in equity/equity related instruments of the companies in the Resources & Energy sector in India.

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

Scheme Risk-O-Meter



Investors understand that their principal will be at Very High Risk

Benchmark Risk-O-Meter



It may be noted that risk-o-meter specified above is based on internal assessment. The same shall be updated as per provision no. 17.4.1.i of SEBI Master Circular on Mutual Fund dated 27.06.2024, on Product labelling in mutual fund schemes on ongoing basis.

SCHEME PERFORMANCE IN SEBI FORMAT (As on 31st August 2024)

Period	Tata Resources & Energy Fund		Nifty Commodities TRI*		Nifty 50 TRI#	
	Return %	Rs.	Return %	Rs.	Return %	Rs.
1 Year	44.39%	14,439	53.46%	15,346	32.64%	13,264
3 Year	17.63%	16,275	21.64%	17,999	15.17%	15,274
5 Year	28.25%	34,747	26.91%	32,968	19.37%	24,262
Since Inception	19.22%	45,977	19.34%	46,378	15.72%	35,518
Inception Date: 28-Dec-15				Managing Since : 09-Mar-21		

*Amount in rupees denotes Value of Standard Investment of Rs 10,000

Performance of other funds managed by the Fund Managers

SATISH CHANDRA MISHRA	1 Year	3 Year	5 Year
Tata Hybrid Equity Fund	28.98	14.11%	16.61%
CRISIL Hybrid 35+65 Aggressive Index*	28.39%	13.85%	17.00%
Tata Mid Cap Growth Fund	46.69%	23.78%	28.13%
Nifty Midcap 150 TRI*	50.08%	27.88%	31.88%

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Established in 1994, Tata Asset Management Private Limited is the investment manager for Tata Mutual Fund. It is one of the oldest mutual funds in India with a unique folio base of over 45,31,292 (latest available as on 31st July 2024). Tata Mutual Fund takes pride in managing the investments of the common man right from childhood to retirement. It offers a wide choice of funds for every need across the entire risk return spectrum. These include equity funds, debt funds, hybrid funds and few others.

Disclaimer: The views expressed in this article are personal in nature and in is no way trying to predict the markets or to time them. The views expressed are for information purpose only and do not construe to be any investment, legal or taxation advice. Any action taken by you on the basis of the information contained herein is your responsibility alone and Tata Asset Management Pvt. Ltd. will not be liable in any manner for the consequences of such action taken by you. Please consult your Mutual Fund Distributor before investing. The views expressed in this article may not reflect in the scheme portfolios of Tata Mutual Fund. The view expressed are based on the current market scenario and the same is subject to change. There are no guaranteed or assured returns under any of the scheme of Tata mutual Fund.

Mutual Fund investments are subject to market risks, read all scheme related documents carefully.

For further information, contact:

Heena Uttamchandani

Corporate Communication

Email: huttamchandani@tataamc.com

Niharika Saluja

Adfactors PR

Email: niharika.saluja@adfactorspr.com**TATA ASSET MANAGEMENT PRIVATE LIMITED**

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