

Dear Patrons,
Greetings!

We are pleased to share our monthly newsletter “Knowledge Initiative” for October 2020.

We thank you for reading and acknowledging our newsletter every month. Knowledge Initiative Team is committed to bring to you more educative and informative articles.



1. GLOBAL FUNDS

Global Funds are mutual funds that invest in securities of foreign companies listed in foreign markets giving you international exposure.

Have you ever thought of reaping benefits from global growth track record of big companies like Google, Walmart, Apple?

Global Funds / International Mutual Fund is for you!



2. SIP TOP-UPS

A facility that gives you the option to increase your monthly SIP installment amount, at pre-defined intervals by a fixed amount or a percentage.

It helps in reaching financial goals faster & beat inflation.



3. LIST OF TOP MUTUAL FUNDS:

Most of us either Google for it or asks his/her friend or colleagues about it. So, here we have collated a list for you.

Check the best performing funds in their respective categories.



1. What are Global Funds?

These are mutual funds that invest in securities of foreign companies listed in foreign markets.

Structurally, the funds could be described as those which invest directly in global markets, funds that use a feeder route to invest in an existing global fund, and fund of funds that invest in several funds to achieve international exposure.

Investing in International Mutual Funds: A Smart Choice



Access Globally Renowned Firms

- Investment in a global company, benefits you from its global presence and spread.
- The growth prospects of such companies are not restricted to a country.



Diversify Across Countries

- Spreading your investments across geographies is diversification on a global scale
- Regional markets perform differently based on local as well as global events and incidents.



Currency Diversification

- Investing in these funds can also be a hedge against the rupee, which has been depreciating against the dollar over the long term.
- One can earn Foreign Exchange appreciation gain without any change in invested value.



Low Correlation

- Low correlation between different countries indicates how the indices of these two markets seldom move in tandem.
- It implies, if performance of investments in one geographical region goes up, returns on other declines less or sometimes even gain.

The Indian equity market accounts for only 2% of the World's total market capitalization. Global Funds give the opportunity to invest in the rest of the international equities market and aim to benefit from a diversified equity portfolio.

We advice you to, allocate 10-15% exposure to Global Funds, to provide a hedge against domestic equities.



2. What is SIP Top-ups?

SIP Top-ups is an option available to SIP investors wherein they can automatically increase their SIP contributions in the fund they are already investing in.

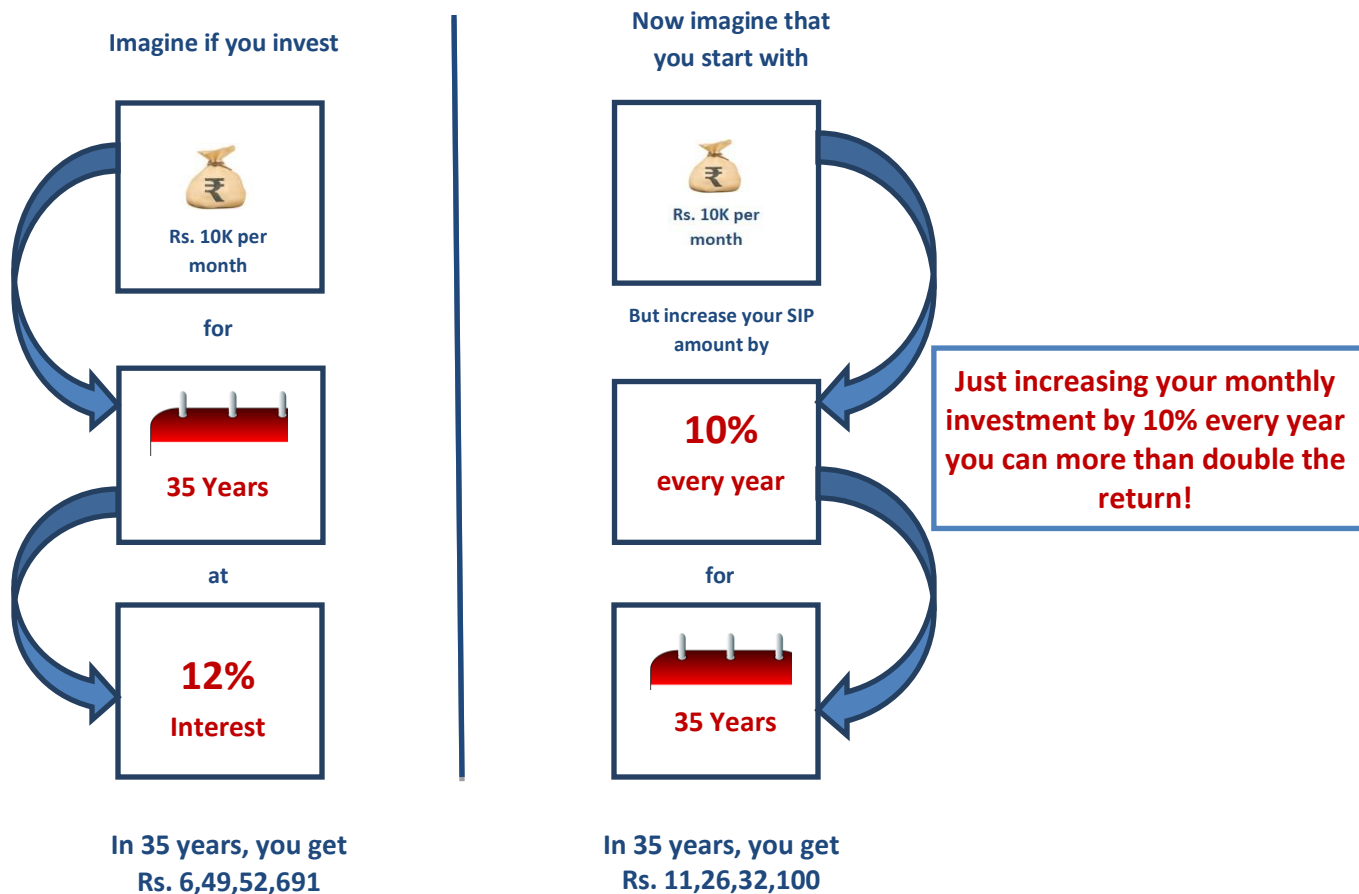
The incremental investing due to Step up SIPs helps a corpus to grow faster.

What are the benefits of SIP Top Up?

- ✓ Helps you reach your financial goals faster and you can expand your goals during the time.
- ✓ Top Up automatically accounts for any inflation during the given time period.
- ✓ Increase your investments with increasing income automatically.
- ✓ A SIP can help you buy your dream home soon, while a top-up could give you the leverage to buy it sooner.

Traditional monthly SIPs vs SIP Top-ups

Make the Most of SIP's by steadily increasing the investment amount every year



3. LIST OF TOP MUTUAL FUNDS

Check the best performing funds in their respective categories.

CATEGORY	NAME OF SCHEME
LARGE CAP	Axis Bluechip Fund Mirae Asset Large Cap Fund
LARGE AND MID CAP	Mirae Asset Emerging Bluechip Fund Kotak Equity Opportunities Fund
MULTICAP	DSP Equity Fund Kotak Standard Multicap Fund
FOCUSED	SBI Focused Equity Fund Axis Focused 25 Fund
MID CAP	Axis Midcap Fund DSP Midcap Fund
SMALL CAP	Axis Small Cap Fund SBI Small Cap Fund
ELSS	Axis Long Term Equity Fund Mirae Asset Tax Saver Fund
HYBRID AGGRESSIVE	Mirae Asset Hybrid Equity Fund SBI Equity Hybrid Fund
BALANCED ADVANTAGE FUND	DSP Dynamic Asset Allocation Fund Edelweis Balanced Advantage Fund
HEALTHCARE	Mirae Asset Healthcare Fund TATA India Pharma and Healthcare Fund
GLOBAL	Franklin India Feeder Franklin US Opp Fund Edelweiss US Technology Equity Fund of Fund
DEBT - CORPORATE BOND	Kotak Corporate Bond Fund ICICI Pru Corporate Bond Fund
DEBT - BANKING & PSU	DSP Banking & PSU Debt Fund IDFC Banking & PSU Debt Fund



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