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AMFI registered mutual fund distributor

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>>> NEWSLETTER

KNOWLEDGE INITIATIVE



>>> 1. AGGRESSIVE EQUITY SIP BASKET - A POWERFUL PATH TO WEALTH CREATION

The Aggressive Equity SIP Basket is a high-growth investment strategy designed to maximize wealth creation over the long term. It involves systematic investments in a carefully curated basket of equity funds, focusing on high-growth sectors and companies with strong fundamentals.

Aggressive Equity SIP Basket offers a strategic, high-reward investment pathway.

2. TRADITIONAL INVESTMENTS VS MUTUAL FUNDS:

Traditional investments like fixed deposits, gold, and real estate offer stability and lower risk but generally provide lower returns. They are ideal for wealth preservation but may not outpace inflation.

In contrast, mutual funds carry higher risk but offer greater potential for long-term wealth creation and financial growth.



>>> 3. LIST OF TOP MUTUAL FUNDS

Check the best performing mutual funds in their respective categories.



1. Aggressive Equity SIP Basket – A Powerful Path to Wealth Creation:

Mutual Funds (MFs) are becoming a staple in household investment portfolios nationwide, offering a versatile and dynamic approach to building wealth. One of the most popular ways to invest in MFs is through a Systematic Investment Plan (SIP). SIPs enable investors to channel their monthly savings into mutual fund units, aligning with their financial goals and risk profiles.

For those with higher risk tolerance and a desire for significant long-term returns, the Aggressive Equity SIP Basket could be an ideal choice.

The Aggressive SIP Basket Proposal:

Recommended Aggressive SIP Basket allocates your investments strategically:

- 30% in Small Cap Funds
- 30% in Mid Cap Funds
- 20% in Sectoral/Thematic Funds IT
- 20% in Sectoral/Thematic Funds Banks

This Basket aims to harness the superior returns that aggressive funds can offer by diversifying across these high-growth potential segments.

Past Performance:

SIP Performance of Aggressive Equity SIP Basket

SIP Amount - ₹100,000

■ Smallcap Category Average ■ Midcap Category Average ■ IT Category Average ■ Banking Category Average



SIP Basket Break-Up: Small Cap - ₹30,000; Midcap - ₹30,000; IT - ₹20,000; Banking - ₹20,000

Portfolio performance consists of Category Average performance of the above mentioned categories and no individual funds has been considered.

Value Date - 01-Apr-24

The performance would be noteworthy if you had allocated ₹1 lakh as an SIP into this basket 10 years ago. Historically, Small Cap and Mid Cap funds have shown robust growth, often outperforming large caps over the long term. Sectoral and thematic funds, although volatile, can capture extraordinary gains when their respective sectors flourish. Assuming a compounded annual growth rate (CAGR) typical for these aggressive categories, your investment could have grown exponentially.

Get in touch with us at mail@netbrokers.co.in to know more.



2. Traditional Investments Vs Mutual Funds:

Traditionally, India has had a higher household savings rate. However, such savings went towards traditional investment products, which used to offer guaranteed returns, even when such returns were relatively lower. The love of Indians towards physical assets has been eternal, and thus, a part of savings used to get channelized into tangible assets like gold, and real estate.

In contrast, Mutual Funds offer the potential for higher returns by investing in a diversified portfolio of stocks, bonds, or other securities. Although they carry market risks, the long-term benefits often outweigh the short-term volatility.

The Comfort of Traditional Investments:

Traditional Investments have long been considered a safe and secure investment option, offering guaranteed returns. The appeal lies in the certainty and predictability, providing a sense of financial security. However, this sense of safety often comes at the cost of higher returns. While Traditional Investments might protect your principal amount, they often fail to outpace inflation, leading to a gradual erosion of purchasing power.

The Growth Potential of Mutual Funds:

In contrast, Mutual Funds offer the potential for higher returns by investing in a diversified portfolio of stocks, bonds, or other securities. Although they carry market risks, the long-term benefits often outweigh the short-term volatility. By starting early and staying invested, you can leverage the power of compounding, allowing your money to grow exponentially over time.

Different Equity & Hybrid Mutual Fund Category Returns:

Category	1 Year	3 Years	5 Years	10 Years
Large Cap Fund	35.36	17.56	17.62	13.8
Mid Cap Fund	55.19	24.72	26.96	19.12
Small Cap Fund	50.38	25.25	30.83	20.5
Flexi Cap Fund	41.2	19.22	20.13	15.53
ELSS Fund	40.62	19.76	20.29	15.59
Large & Mid Cap Fund	45.45	21.53	22.14	16.7
Multi Cap Fund	47.92	22.75	23.89	17.3
Dividend Yield Fund	49.76	24.48	24.4	15.87
Focused Fund	39.15	18.94	19.39	15.18
Value Fund	49.38	23.26	22.53	16.74

Category	1 Year	3 Years	5 Years	10 Years
Aggressive Hybrid Fund	31.90	16.15	16.97	13.08
Balanced Advantage	24.69	13.65	13.72	11.39
Conservative Hybrid Fund	13.40	9.00	8.85	8.30
Dynamic Asset Allocation	25.57	11.53	11.93	9.84
Equity Savings	16.05	9.66	9.92	8.54
Multi Asset Allocation	27.61	16.33	18.38	12.76

It's important to balance your portfolio according to your risk tolerance and financial goals. While Traditional investments can be part of your investment strategy for stability and liquidity, allocating a portion of your investments to Mutual Funds can significantly enhance your wealth-creation potential. Get in touch with us at mail@netbrokers.co.in to know more.

3. LIST OF TOP MUTUAL FUNDS

Check the best performing funds in their respective categories.

CATEGORY	NAME OF SCHEME
LARGE CAP	ICICI Prudential Bluechip Fund Nippon India Large Cap Fund
LARGE AND MID CAP	Franklin India Opportunities Fund Whiteoak Capital Large & Mid Cap Fund
FLEXI CAP	JM Flexi Cap Fund Parag Parikh Flexi Cap Fund
MULTI CAP	Nippon India Multi Cap Fund HSBC Multi Cap Fund
FOCUSED	SBI Focused Equity Fund Nippon India Focused Equity Fund
MID CAP	Edelweiss Midcap Fund Whiteoak Capital Mid Cap Fund
SMALL CAP	Bandhan Small Cap Fund Franklin India Smaller Companies Fund
ELSS	Parag Parikh Tax Saver Fund Bandhan Tax Advantage Fund
HYBRID AGGRESSIVE	JM Aggressive Hybrid Fund Edelweiss Aggressive Hybrid Fund
BALANCED ADVANTAGE FUND	Tata Balanced Advantage Fund Edelweiss Balanced Advantage Fund
TECHNOLOGY	Franklin India Technology Fund Tata Digital India Fund
HEALTHCARE	Mirae Asset Healthcare Fund DSP Healthcare Fund

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