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AMFI registered mutual fund distributor

>>> **Newsletter**

**KNOWLEDGE INITIATIVE –
FEBRUARY 2026**

FROM THE DIRECTOR'S DESK: NAVIGATING THE POST-BUDGET LANDSCAPE

As we move into the second month of 2026, the Indian economic landscape stands at a pivotal juncture. The Union Budget 2026-27 has just been unveiled, and it carries the clear imprint of a nation in a hurry to secure its spot as the world's third-largest economy.

At Net Brokers, our mission has always been to simplify the complex world of finance for you. In this edition, we break down the nuances of the Budget and what it means for your hard-earned savings.

Disclaimer:

Mutual Fund investments are subject to market risks, read all scheme related documents carefully. The content provided is for educational purposes only and should not be considered financial advice.

1. BUDGET 2026: THE BLUEPRINT FOR A 'VIKSIT BHARAT'

The Finance Minister has delivered a budget that prioritizes macro-stability while fueling micro-growth. Unlike populist budgets of the past, Budget 2026 is a masterclass in strategic allocation.

Key Structural Pillars:

- **Infrastructure & Connectivity:** The government has increased the capital expenditure (CAPEX) outlay by 12% over the previous year. The focus has shifted from mere "road construction" to "smart corridors," integrating AI-driven logistics to reduce the cost of moving goods—a move that will significantly benefit the manufacturing and export sectors.
- **Tax Reforms for the Middle Class:** In a welcome move, the slabs under the New Tax Regime have been further rationalized. This is a clear signal to increase the "disposable surplus" in the hands of the salaried class, encouraging both consumption and investment in financial assets.
- **Energy Transition:** With a massive push for 'Circular Economy' initiatives and Green Hydrogen, the budget paves the way for India to become a global hub for sustainable technology. For investors, this opens up a decade-long window in the Power and Utility sectors.

2. INVESTMENT STRATEGY: DISCIPLINE OVER SPECULATION

With the budget highlights now public, the markets may experience a period of price discovery. It is natural to feel the urge to "shuffle" your portfolio based on the latest news. However, at Net Brokers, we advocate for **Strategic Asset Allocation**.

Why SIPs Remain Your Best Friend in 2026:

- The Indian equity market is currently in a "Long-Term Bull Phase," but this journey is never a straight line. Market volatility is simply the price we pay for superior long-term returns. By continuing your Systematic Investment Plans (SIPs), you:
- **Neutralize Market Noise:** You buy more when the market is "on sale" and less when it is expensive.
- **Tax-Efficient Growth:** With the recent budget keeping Long-Term Capital Gains (LTCG) structures stable, equity mutual funds remain one of the most tax-efficient wealth-creation tools available.

Inflation Protection: While fixed-income products provide safety, only equities have the historical track record of beating inflation over the long run.

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3. PERFORMANCE TRACKER: TOP MUTUAL FUND PICKS

Based on our internal research and the post-budget sector outlook, here are the funds showing consistent risk-adjusted performance:

Category	Recommended Funds	3-Year CAGR (Approx)	Risk Profile
Flexi Cap	HDFC Flexi Cap Fund	22.48%	Moderate
Large & Mid Cap	Invesco India Large & Mid Cap Fund	25.07%	Moderate-High
Multi Cap	Kotak Multicap Fund	24.07%	High
Mid Cap	Edelweiss Mid Cap Fund	25.96%	High
Small Cap	Bandhan Small Cap Fund	30.33%	High
Hybrid Multi Asset	Nippon India Multi Asset Allocation Fund	21.83%	Conservative/Moderate

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4. A NOTE ON FINANCIAL HEALTH

While the budget creates the environment, your personal financial success depends on your Financial Plan. We encourage you to use this month to review your insurance coverage and ensure your emergency funds are adequate. A robust portfolio is built on a foundation of protection.

Director's Closing Thought:

"Wealth is not just about how much money you make; it's about how much money you keep and how hard it works for you. Budget 2026 has provided the wind; now it is time for you to set your sails."

Warm Regards,
Akhil Chugh,
Director,

Net Brokers Private Limited

Contact Us:

- Email: mail@netbrokers.co.in
- Phone: +91-9811264927
- Web: www.netbrokers.co.in

Address: 309, 3rd Floor, DLF Avenue, Saket, New Delhi – 110017

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