

GUPTA

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“Quality Investment under one roof”

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Fundamentals of Mutual Fund Investing

1. Define Your Goals

Start with a clear understanding of your financial goals—short-term, medium-term, or long-term. This helps in selecting the right type of mutual fund.

2. Know Your Risk Appetite

Assess how much risk you can tolerate. Equity funds suit higher risk-takers, while debt or balanced funds are better for conservative investors.

3. Diversification is Key

Mutual funds offer built-in diversification, spreading your investments across different assets to reduce risk.

4. Understand Fund Categories

Familiarize yourself with equity, debt, hybrid, and index funds. Each serves a specific purpose and caters to different needs.

5. Expense Ratio Matters

Consider the fund's expense ratio as it impacts your returns. Lower costs, combined with strong fund management, yield better results.

6. Invest for the Long Term

Mutual funds perform best over time, allowing the power of compounding to work in your favor.

7. Stay Disciplined

Use SIPs (Systematic Investment Plans) to invest regularly, regardless of market fluctuations.

8. Review and Rebalance

Periodically review your portfolio to ensure it aligns with your goals. Rebalance as needed.

9. Tax Implications

Be aware of the tax treatment for gains from mutual funds—short-term and long-term capital gains vary by fund type.

10. Seek Professional Advice

A financial planner can help you choose the right funds and manage your investments effectively.

Warm Regards,

Gagan Gupta
Gupta Investments Financial Services Pvt Ltd.



Gupta Investments Financial Services Pvt Ltd™
AMFI Registered Mutual Fund Distributor
“Quality Investment under one roof”

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FIXED DEPOSIT UPDATES

Fixed Deposit Schemes w.e.f 14th January, 2025

Name of the Company	Min Amt	Sr. Citizen	Cr. Rating	(Interest rate %) (Period in Months)							Interest frequency	
				12-14	15-23	24-35	36-60					
BAJAJ FINANCE LIMITED (FD Max: Valid for deposit amount from Rs. 15,000 to Rs 25,000)				12-14	15-23	24-35	36-60					
For Individual Deposits upto 3 Crore w.e.f 14th Nov, 2024	15,000		FAAA	7.35	7.44	7.72	8.00				Monthly Qtrly Half Yearly Ann Cum	
			(CRISIL)	7.39	7.49	7.77	8.05					
			MAAA	7.46	7.56	7.85	8.13					
			(ICRA)	7.60	7.70	8.00	8.30					
				7.60	7.70	8.00	8.30					
BAJAJ FINANCE LIMITED (FD Max: Valid for deposit amount from Rs. 15,000 to Rs 25,000)				18	22	33	44	42 (Online)				
For Individual Deposits upto 3 Crore w.e.f 14th Nov, 2024	15,000		FAAA	7.72	7.81	8.00	8.14	8.28		Monthly Qtrly Half Yearly Ann Cum		
			(CRISIL)	7.77	7.87	8.05	8.20	8.34				
			MAAA	7.85	7.94	8.13	8.28	8.42				
			(ICRA)	8.00	8.10	8.30	8.45	8.60				
				8.00	8.10	8.30	8.45	8.60				
BAJAJ FINANCE LIMITED (FD Max: Valid for deposit amount from Rs. 15,000 to Rs 25,000)				12-14	15-23	24-35	36-60					
For Senior Citizen Deposits upto 3 Crore w.e.f 14th Nov, 2024	15,000		FAAA	7.58	7.67	8.09	8.23		Monthly Qtrly Half Yearly Ann Cum			
			(CRISIL)	7.63	7.72	8.15	8.29					
			MAAA	7.70	7.80	8.23	8.37					
			(ICRA)	7.85	7.95	8.40	8.55					
				7.85	7.95	8.40	8.55					
BAJAJ FINANCE LIMITED (FD MAX: VALID FOR DEPOSIT AMOUNT FROM RS. 15,000 TO RS 25,000)				18	22	33	44	42 (Online)				
For Senior Citizen Deposits upto 3 Crore w.e.f 14th Nov, 2024	15,000		FAAA	7.95	8.05	8.23	8.37	8.51	Monthly Qtrly Half Yearly Ann Cum			
			(CRISIL)	8.01	8.10	8.29	8.43	8.57				
			MAAA	8.09	8.18	8.37	8.52	8.66				
			(ICRA)	8.25	8.35	8.55	8.70	8.85				
				8.25	8.35	8.55	8.70	8.85				
BAJAJ FINANCE LIMITED (Regular FD: Valid for deposit amount from Rs. 25,001 to 3,00,00,000)				12-14	15-23	24-35	36-60					
For Individual Deposits upto 3 Crore w.e.f 14th Nov, 2024	15,000		FAAA	7.16	7.25	7.53	7.81		Monthly Qtrly Half Yearly Ann Cum			
			(CRISIL)	7.20	7.30	7.58	7.87					
			MAAA	7.27	7.36	7.65	7.94					
			(ICRA)	7.40	7.50	7.80	8.10					
				7.40	7.50	7.80	8.10					
BAJAJ FINANCE LIMITED (Regular FD: Valid for deposit amount from Rs. 25,001 to 3,00,00,000)				18	22	33	44	42 (Online)				
For Individual Deposits upto 3 Crore w.e.f 14th Nov, 2024	15,000		FAAA	7.53	7.63	7.81	7.95	8.09	Monthly Qtrly Half Yearly Ann Cum			
			(CRISIL)	7.58	7.68	7.87	8.01	8.15				
			MAAA	7.65	7.75	7.94	8.09	8.23				
			(ICRA)	7.80	7.90	8.10	8.25	8.40				
				7.80	7.90	8.10	8.25	8.40				
BAJAJ FINANCE LIMITED (Regular FD: Valid for deposit amount from Rs. 25,001 to 3,00,00,000)				12-14	15-23	24-35	36-60					
For Senior Citizen Deposits upto 3 Crore w.e.f 14th Nov, 2024	15,000		FAAA	7.39	7.49	7.91	8.05		Monthly Qtrly Half Yearly Ann Cum			
			(CRISIL)	7.44	7.53	7.96	8.10					
			MAAA	7.51	7.61	8.04	8.18					
			(ICRA)	7.65	7.75	8.20	8.35					
				7.65	7.75	8.20	8.35					
BAJAJ FINANCE LIMITED (REGULAR FD: VALID FOR DEPOSIT AMOUNT FROM RS. 25,001 TO 3,00,00,000)				18	22	33	44	42 (Online)				
For Senior Citizen Deposits upto 3 Crore w.e.f 14th Nov, 2024	15,000		FAAA	7.77	7.86	8.05	8.19	8.33	Monthly Qtrly Half Yearly Ann Cum			
			(CRISIL)	7.82	7.91	8.10	8.24	8.38				
			MAAA	7.89	7.99	8.18	8.33	8.47				
			(ICRA)	8.05	8.15	8.35	8.50	8.65				
				8.05	8.15	8.35	8.50	8.65				
MAHINDRA FINANCE				12	24	36	48	60				
Deposits upto 2 Cr W.e.f. 25th April, 2024 Add interest rate of 0.10% p.a. for renewal of Deposits	50,000		FAAA	7.10	7.30	7.55	7.50	7.55	Monthly Qtrly Half yearly Yearly Cum/Yield			
	25,000		(CRISIL)	7.20	7.40	7.65	7.60	7.65				
				7.25	7.55	7.85	7.80	7.85				
				7.50	7.80	8.10	8.05	8.10				
5,000			7.50	8.10	8.77	9.08	9.52					
SHRIRAM FINANCE LIMITED				12	18	24	30	36	42	50	60	
FRESH DEPOSIT (For Individual) w.e.f 9th April 2024	5,000		FAAA	7.59	7.73	7.87	8.05	8.38	8.42	8.47	8.47	Monthly Qtrly Half yearly Yearly Cum/Yield
			(CRISIL)	7.63	7.77	7.92	8.10	8.43	8.47	8.52	8.52	
			MAA+	7.71	7.85	8.00	8.18	8.52	8.56	8.62	8.62	
			(ICRA)	7.85	8.00	8.15	8.35	8.70	8.75	8.80	8.80	
				7.85	8.16	8.49	8.88	9.49	9.75	10.10	10.50	
SHRIRAM FINANCE LIMITED				12	18	24	30	36	42	50	60	
RENEWAL DEPOSIT (For Individual) w.e.f 9th April 2024	5,000		FAAA	7.84	7.98	8.12	8.30	8.63	8.67	8.72	8.72	Monthly Qtrly Half yearly Yearly Cum/Yield
			(CRISIL)	7.89	8.03	8.17	8.35	8.69	8.73	8.78	8.78	
			MAA+	7.96	8.11	8.25	8.44	8.78	8.82	8.87	8.87	
			(ICRA)	8.12	8.27	8.42	8.62	8.97	9.02	9.07	9.07	
				8.12	8.44	8.78	9.18	9.81	10.08	10.46	10.88	
SHRIRAM FINANCE LIMITED				12	18	24	30	36	42	50	60	
FRESH DEPOSIT (For SENIOR CITIZEN) w.e.f 9th April 2024	5,000		FAAA	8.09	8.23	8.37	8.55	8.88	8.92	8.97	8.97	Monthly Qtrly Half yearly Yearly Cum/Yield
			(CRISIL)	8.14	8.28	8.42	8.61	8.94	8.98	9.03	9.03	
			MAA+	8.22	8.37	8.51	8.70	9.04	9.08	9.13	9.13	
			(ICRA)	8.39	8.54	8.69	8.89	9.25	9.29	9.34	9.34	
				8.39	8.72	9.07	9.49	10.13	10.42	10.81	11.26	
SHRIRAM FINANCE LIMITED				12	18	24	30	36	42	54	60	
RENEWAL DEPOSIT (For SENIOR CITIZEN) w.e.f 9th April 2024	5,000		FAAA	8.34	8.48	8.62	8.80	9.13	9.17	9.22	9.22	Monthly Qtrly Half yearly Yearly Cum/Yield
			(CRISIL)	8.39	8.54	8.68	8.86	9.19	9.24	9.29	9.29	
			MAA+	8.48	8.63	8.77	8.96	9.30	9.34	9.39	9.39	
			(ICRA)	8.66	8.81	8.96	9.16	9.52	9.56	9.61	9.61	
				8.66	9.00	9.37	9.80	10.45	10.76	11.18	11.65	

Interest are Subject to change & the rate applicable would be the rate prevalent on the date of deposit



Contd...

FIXED DEPOSIT UPDATES

Fixed Deposit Schemes w.e.f 14th January, 2025

Name of the Company	Min Amt	Sr. Citizen	Cr. Rating	(Interest rate %) (Period in Months)								Interest frequency
WOMEN DEPOSIT SCHEME												
SHRIRAM FINANCE LIMITED				12	18	24	30	36	42	50	60	
FRESH DEPOSIT (For Individual) w.e.f 9th April 2024	5,000		FAAA (CRISIL) MAA+ (ICRA)	7.69 7.73 7.81 7.96 7.96	7.83 7.88 7.95 8.11 8.27	7.97 8.02 8.10 8.26 8.60	8.15 8.20 8.28 8.46 9.00	8.48 8.54 8.63 8.81 9.61	8.52 8.58 8.67 8.86 9.88	8.57 8.63 8.72 8.91 10.24	8.57 8.63 8.72 8.91 10.65	Monthly Qtrly Half yearly Yearly Cum/Yield
SHRIRAM FINANCE LIMITED				12	18	24	30	36	42	50	60	
RENEWAL DEPOSIT (For Individual) w.e.f 9th April 2024	5,000		FAAA MAA+ (ICRA)	7.94 7.99 8.07 8.23 8.23	8.08 8.13 8.21 8.38 8.55	8.22 8.27 8.36 8.53 8.90	8.40 8.45 8.54 8.73 9.31	8.73 8.79 8.89 9.08 9.93	8.77 8.83 8.93 9.13 10.22	8.82 8.88 8.98 9.18 10.60	8.82 8.88 8.98 9.18 11.03	Monthly Qtrly Half yearly Yearly Cum/Yield
SHRIRAM FINANCE LIMITED				12	18	24	30	36	42	50	60	
FRESH DEPOSIT (For SENIOR CITIZEN) w.e.f 9th April 2024	5,000		FAAA (CRISIL) MAA+ (ICRA)	8.19 8.24 8.33 8.50 8.50	8.33 8.38 8.47 8.65 8.84	8.47 8.52 8.62 8.80 9.19	8.65 8.71 8.80 9.00 9.61	8.98 9.04 9.14 9.35 10.26	9.02 9.08 9.19 9.40 10.56	9.07 9.13 9.24 9.45 10.96	9.07 9.13 9.24 9.45 11.42	Monthly Qtrly Half yearly Yearly Cum/Yield
SHRIRAM FINANCE LIMITED				12	18	24	30	36	42	50	60	
RENEWAL DEPOSIT (For SENIOR CITIZEN) w.e.f 9th April 2024	5,000		FAAA (CRISIL) MAA+ (ICRA)	8.44 8.49 8.58 8.77 8.77	8.58 8.64 8.73 8.92 9.12	8.72 8.78 8.87 9.07 9.48	8.90 8.96 9.06 9.27 9.92	9.23 9.30 9.40 9.63 10.58	9.27 9.34 9.45 9.67 10.90	9.32 9.39 9.50 9.72 11.32	9.32 9.39 9.50 9.72 11.81	Monthly Qtrly Half yearly Yearly Cum/Yield
ICICI HOME FINANCE		0.25		>=12- >24	>=24- > 36	>=36- > 48	>=48- > 60	>=60- - 72	>=72- - 84	>=84- 108	>=108- 120	
W.e.f. 1st June 2024	40,000 20,000 10,000		FAAA (CRISIL) MAAA (ICRA)	7.00 7.05 7.25 7.25	7.40 7.45 7.65 7.94	7.50 7.55 7.75 8.37	7.50 7.55 7.75 8.70	7.40 7.45 7.65 8.91	7.30 7.35 7.55 9.13	7.30 7.35 7.55 9.49	7.30 7.35 7.55 10.28	Monthly Qtrly Ann Cum/Yield
ICICI HOME FINANCE		0.25		39	45							
Special Scheme W.e.f. 1st June 2024	40,000 20,000 10,000		FAAA (CRISIL) MAAA (ICRA)	7.55 7.60 7.80 8.51	7.55 7.60 7.80 8.68							Monthly Qtrly Ann Cum/Yield
PNB Housing Finance Ltd				12-23	24-35	36-47	48-59	60-71	72-84	120		
W.e.f. 1st June 2024 * Senior Citizen (above 60 years) will be eligible for 0.30% p.a. additional Rate of Interest for tenure 12-23 & 24-35 months with effect from 15.04.2024 * Senior Citizen (above 60 years) will be eligible for 0.20% p.a. additional Rate of Interest for tenure 36 months and above with effect from 15.04.2024	25,000 10,000		FAA+/- (CRISIL) AA+ (CARE)	7.21 7.25 7.32 7.45 7.45	7.02 7.06 7.12 7.25 7.51	7.49 7.53 7.61 7.75 8.37	7.16 7.20 7.26 7.40 8.26	7.35 7.39 7.46 7.60 8.85	7.16 7.20 7.27 7.40 8.91	7.16 7.20 7.27 7.40 10.42		Monthly Qtrly Half yearly Yearly Cum/Yield
GODREJ AND MFG CO. LTD		0.25				36						
W.e.f. 14th Sept, 2024	40,000		(CRISIL) AA			8.00 8.05 8.15						Monthly Qtrly Half yearly

HDFC BANK FIXED DEPOSIT RATES			w.e.f 24th July, 2024
PERIOD	DEPOSIT RS LESS THAN 2 CRORES		
	REGULAR INTEREST RATE	SENIOR CITIZEN RATE	
	RATE PER ANNUM	RATE PER ANNUM	
7 - 14 days	3.00%	3.50%	
15 - 29 days	3.00%	3.50%	
30 - 45 days	3.50%	4.00%	
46 - 60 days	4.50%	5.00%	
61 - 89 days	4.50%	5.00%	
90 days < = 6 months	4.50%	5.00%	
6 months 1 days < = 9 months	5.75%	6.25%	
9 months 1 day to < 1 year	6.00%	6.50%	
1 year to < 15 months	6.60%	7.10%	
15 months to < 18 months	7.10%	7.60%	
18 months to < 21 months	7.25%	7.75%	
21 months - 2 years	7.00%	7.50%	
2 Years 1 day to < 2 Year 11 Months	7.00%	7.50%	
2 Years 11 Months - 35 Months	7.35%	7.85%	
2 Years 11 Months 1 day < = 3 Year	7.00%	7.50%	
3 Years 1 day to < 4 Years 7 Months	7.00%	7.50%	
4 Year 7 Months - 55 months	7.40%	7.90%	
4 Year 7 Months 1 day < = 5 Years	7.00%	7.50%	
5 Years 1 day - 10 Years	7.00%	7.50%	

Disclaimer Note:

- Please refer Interest Rates before investing. Interest Rate are Subject to Change, if any.
- Please submit your FDR's 1 month in advance for smooth payment.

FDR Investor please submit 15G/15H for F. Y. 2024-25, at the earliest to avoid TDS deductions. We are not responsible for non submission of 15G/15H for the respective FD Companies. Subject to Change if any.

Interest rates are subject to change from time to time. Applicable interest rates will be given as on the date / time of receipt of the funds by the Company/Bank.



Mutual Fund Updates

Largecap Fund

Scheme Name	NAV	Corpus (In crs.)	Fund Manager	Launch Date	Absolute			Compound Annualized					
					1 Month	3 Months	6 Months	1 Year	2 Years	3 Years	5 Years	7 Years	10 Years
Bandhan Large Cap Fund - Reg - Growth	73.535(08-Jan-25)	1759.5314(Nov 2024)	Manish Gunwani, Prateek Poddar, Ritika Behera	09-Jun-06	-4.3372	-5.4078	-1.3006	17.4782	22.7204	12.3789	16.8827	12.3172	11.8819
ICICI Prudential Bluechip Fund - Growth	103.71(08-Jan-25)	63938.0277(Nov 2024)	Anish Tawakley, Vaibhav Dusat	23-May-08	-3.9811	-4.8008	-1.4913	17.334	22.3994	15.7906	18.6894	14.0933	13.8162
Invesco India Largecap Fund - Growth	66.98(08-Jan-25)	1323.9170(Dec 2024)	Amit Nigam, Hiten Jain	21-Aug-09	-4.4372	-3.6398	-0.0448	20.1262	24.4346	13.2029	17.7367	13.5206	13.0124
Nippon India Large Cap Fund - Reg - Growth	85.9174(08-Jan-25)	35699.9900(Dec 2024)	Sailesh Raj Bhan, Bhavik Dave	08-Aug-07	-4.3298	-3.4878	-1.9432	17.6141	25.3018	19.1697	19.558	14.1878	13.9558
Nifty 50	23688.95(08-Jan-25)	--	--	--	-4.007	-5.294	-2.597	10.0856	15.1033	9.9504	14.5052	12.1281	11.1355

* Less than 1 year Absolute returns, Greater than or Equal to 1 year Compound Annualized returns

Midcap Fund

Scheme Name	NAV	Corpus (In crs.)	Fund Manager	Launch Date	Absolute			Compound Annualized					
					1 Month	3 Months	6 Months	1 Year	2 Years	3 Years	5 Years	7 Years	10 Years
HSBC Midcap Fund - Reg - Growth	393.0781(08-Jan-25)	11912.3768(Nov 2024)	Venugopal Manghat, Cheenu Gupta, Sonal Gupta	09-Aug-04	-5.0186	-3.2685	2.8793	33.4121	37.1435	23.3971	23.8715	14.1744	16.8769
Kotak Emerging Equity Fund - Reg - Growth	132.485(08-Jan-25)	52048.9092(Nov 2024)	Atul Bhole	30-Mar-07	-3.3887	-1.5874	1.7253	31.7839	31.5431	21.3677	26.2496	17.535	18.2006
Mahindra Manulife Mid Cap Fund - Reg - Growth	32.8304(08-Jan-25)	3529.0386(Dec 2024)	Krishna Sanghvi, Manish Lodha, Kirti Dalvi	30-Jan-18	-4.8833	-5.2875	-2.0286	25.8815	36.192	22.2903	27.0808	--	--
Motilal Oswal Midcap Fund - Reg - Growth	109.1078(08-Jan-25)	22897.6156(Nov 2024)	Ajay Khandelwal, Niket Shah, Santosh Kumar Singh, Rakesh Shetty, Sunil Sawant	24-Feb-14	-3.6215	0.8331	12.4638	49.2315	46.8448	32.4149	32.2638	21.3766	19.8862
Nifty Midcap 100	56270.6(08-Jan-25)	--	--	--	-4.6241	-4.7917	-1.4138	19.8013	33.1978	21.7952	26.5588	14.5811	16.1484

* Less than 1 year Absolute returns, Greater than or Equal to 1 year Compound Annualized returns

Smallcap Fund

Scheme Name	NAV	Corpus (In crs.)	Fund Manager	Launch Date	Absolute			Compound Annualized					
					1 Month	3 Months	6 Months	1 Year	2 Years	3 Years	5 Years	7 Years	10 Years
Bandhan Small Cap Fund - Reg - Growth	46.161(08-Jan-25)	9248.2846(Nov 2024)	Manish Gunwani, Kirithi Jain, Ritika Behera	25-Feb-20	-5.198	-3.0476	7.9411	37.7694	47.2447	25.7409	--	--	--
Mahindra Manulife Small Cap Fund - Reg - Growth	19.5736(08-Jan-25)	3865.5066(Dec 2024)	Krishna Sanghvi, Manish Lodha, Vishal Jajoo	12-Dec-22	-6.0614	-6.6604	-2.8591	22.6109	40.2244	--	--	--	--
Motilal Oswal Small Cap Fund - Reg - Growth	14.6713(08-Jan-25)	3166.2551(Nov 2024)	Ajay Khandelwal, Niket Shah, Santosh Kumar Singh, Rakesh Shetty, Sunil Sawant	26-Dec-23	-1.3044	6.0617	16.4518	44.7202	--	--	--	--	--
Nippon India Small Cap Fund - Reg - Growth	171.8004(08-Jan-25)	61973.7607(Dec 2024)	Samir Rachh	16-Sep-10	-5.3288	-4.3207	-2.4605	23.0407	35.8076	24.2563	34.0228	19.4801	21.3872
Nifty Smallcap 100	18365.65(08-Jan-25)	--	--	--	-5.9551	-2.6449	-3.1182	19.1824	37.5323	16.8786	25.0355	9.8221	13.275

* Less than 1 year Absolute returns, Greater than or Equal to 1 year Compound Annualized returns

Large & Midcap Fund

Scheme Name	NAV	Launch Date	Corpus (In crs.)	Fund Manager	Absolute			Compound Annualized					
					1 Month	3 Months	6 Months	1 Year	2 Years	3 Years	5 Years	7 Years	10 Years
HDFC Large and Mid Cap Fund - Growth	326.6770 (8-Jan-2025)	18-Feb-94	23988.9671 (Nov-2024)	Dhruv Muchhal, Gopal Agrawal	-3.7546	-4.5304	-1.8829	17.8511	28.135	20.0206	23.348	16.2602	14.02
NIFTY Large Midcap 250 TRI	20039.8700 (8-Jan-2025)	--	--	--	-4.2929	-4.9515	-2.6085	17.0697	25.3277	16.8659	22.1103	15.0603	15.7287
HSBC Large & Mid Cap Fund - Reg - Growth	27.4548 (8-Jan-2025)	28-Mar-19	3978.8938 (Nov-2024)	Abhishek Gupta, Cheenu Gupta	-4.5893	-0.7476	1.6758	33.7891	33.1783	18.2259	21.4542	--	--
NIFTY Large Midcap 250 TRI	20039.8700 (8-Jan-2025)	--	--	--	-4.2929	-4.9515	-2.6085	17.0697	25.3277	16.8659	22.1103	15.0603	15.7287
ICICI Prudential Large & Mid Cap Fund - Growth	934.3600 (8-Jan-2025)	09-Jul-98	17694.4530 (Nov-2024)	Ihab Dalwai	-2.5358	-4.9065	-0.2051	21.4433	26.1583	19.7973	23.1473	15.4881	14.8602
NIFTY Large Midcap 250 TRI	20039.8700 (8-Jan-2025)	--	--	--	-4.2929	-4.9515	-2.6085	17.0697	25.3277	16.8659	22.1103	15.0603	15.7287
Motilal Oswal Large and Midcap Fund (MOFLM) - Reg - Growth	33.9237 (8-Jan-2025)	17-Oct-19	7710.0114 (Nov-2024)	Ajay Khandelwal, Atul Mehra, Rakesh Shetty, Santosh Kumar Singh, Sunil Sawant	-2.1842	1.4969	12.4243	40.0092	40.8556	25.2762	26.005	--	--
NIFTY Large Midcap 250 TRI	20039.8700 (8-Jan-2025)	--	--	--	-4.2929	-4.9515	-2.6085	17.0697	25.3277	16.8659	22.1103	15.0603	15.7287

* Less than 1 year Absolute returns, Greater than 1 year Compound Annualized returns

Multicap Fund

Scheme Name	NAV	Launch Date	Corpus (In crs.)	Fund Manager	Absolute			Compound Annualized					
					1 Month	3 Months	6 Months	1 Year	2 Years	3 Years	5 Years	7 Years	10 Years
HDFC Multi Cap Fund - Reg - Growth	18.5880 (8-Jan-2025)	10-Dec-21	17249.8237 (Nov-2024)	Dhruv Muchhal, Gopal Agrawal	-3.3184	-4.8574	-2.5837	19.3528	29.3945	21.5836	--	--	--
NIFTY 500 Multicap 50:25:25 TRI	20255.8700 (8-Jan-2025)	--	--	--	-4.5952	-5.1667	-2.7063	17.356	25.7486	16.6907	22.2441	14.4366	15.1942
HSBC Multi Cap Fund - Reg - Growth	18.4920 (8-Jan-2025)	30-Jan-23	4361.9007 (Nov-2024)	Gautam Bhupal, Kapil Punjabi, Sonal Gupta, Venugopal Manghat	-4.5412	-2.6527	-0.7541	25.5772	--	--	--	--	--
NIFTY 500 Multicap 50:25:25 TRI	20255.8700 (8-Jan-2025)	--	--	--	-4.5952	-5.1667	-2.7063	17.356	25.7486	16.6907	22.2441	14.4366	15.1942
Kotak Multicap Fund - Reg - Growth	18.7520 (8-Jan-2025)	29-Sep-21	15816.4585 (Nov-2024)	Abhishek Bisen, Devender Singhal	-4.5457	-3.9049	-0.032	24.276	32.2409	23.8099	--	--	--
NIFTY 500 Multicap 50:25:25 TRI	20255.8700 (8-Jan-2025)	--	--	--	-4.5952	-5.1667	-2.7063	17.356	25.7486	16.6907	22.2441	14.4366	15.1942
Nippon India Multi Cap Fund - Reg - Growth	285.8855 (8-Jan-2025)	28-Mar-05	39385.2045 (Dec-2024)	Ashutosh Bhargava, Sailesh Raj Bhan	-4.6175	-5.2719	-3.0093	23.0468	31.1508	24.3151	23.7393	16.2385	14.4632
NIFTY 500 Multicap 50:25:25 TRI	20255.8700 (8-Jan-2025)	--	--	--	-4.5952	-5.1667	-2.7063	17.356	25.7486	16.6907	22.2441	14.4366	15.1942

* Less than 1 year Absolute returns, Greater than 1 year Compound Annualized returns

ELSS

Scheme Name	NAV	Launch Date	Corpus (In crs.)	Fund Manager	Absolute			Compound Annualized					
					1 Month	3 Months	6 Months	1 Year	2 Years	3 Years	5 Years	7 Years	10 Years
HSBC ELSS Tax saver Fund - Reg - Growth	133.5201 (8-Jan-2025)	27-Feb-06	4302.9820 (Nov-2024)	Abhishek Gupta, Gautam Bhupal, Sonal Gupta	-4.1829	-2.6946	1.5029	29.9137	29.9959	16.9199	18.9413	12.275	13.8436
Nifty 500 TRI	35131.0100 (8-Jan-2025)	--	--	--	-4.5442	-5.6697	-3.2597	15.3145	21.0638	14.2642	18.6605	13.9061	13.8507
Motilal Oswal ELSS Tax Saver Fund - Reg - Growth	54.2045 (8-Jan-2025)	21-Jan-15	4186.9326 (Nov-2024)	Ajay Khandelwal, Atul Mehra, Rakesh Shetty, Santosh Kumar Singh	-3.9133	-1.0446	9.9728	40.8992	41.0217	25.4061	23.3998	16.7951	--
Nifty 500 TRI	35131.0100 (8-Jan-2025)	--	--	--	-4.5442	-5.6697	-3.2597	15.3145	21.0638	14.2642	18.6605	13.9061	13.8507
Parag Parikh ELSS Tax Saver Fund - Reg - Growth	30.2030 (8-Jan-2025)	24-Jul-19	4385.1621 (Nov-2024)	Mansi Kariya, Raj Mehta, Rajeev Thakkar, Raunak Onkar, Rukun Tarachandani	-2.261	-2.2911	1.8902	19.2395	23.2693	16.5102	22.6755	--	--
Nifty 500 TRI	35131.0100 (8-Jan-2025)	--	--	--	-4.5442	-5.6697	-3.2597	15.3145	21.0638	14.2642	18.6605	13.9061	13.8507
SBI Long Term Equity Fund - Growth	423.9694 (8-Jan-2025)	31-Mar-93	27847.4861 (Nov-2024)	Dinesh Balachandran	-3.7881	-4.8767	-1.991	25.5833	32.8551	23.1317	23.9161	15.672	14.718
BSE 500 TRI	44508.4478 (8-Jan-2025)	--	--	--	-4.5783	-5.8695	-3.6114	14.8986	20.6695	14.1897	18.7304	13.9971	13.952


* Less than 1 year Absolute returns, Greater than 1 year Compound Annualized returns

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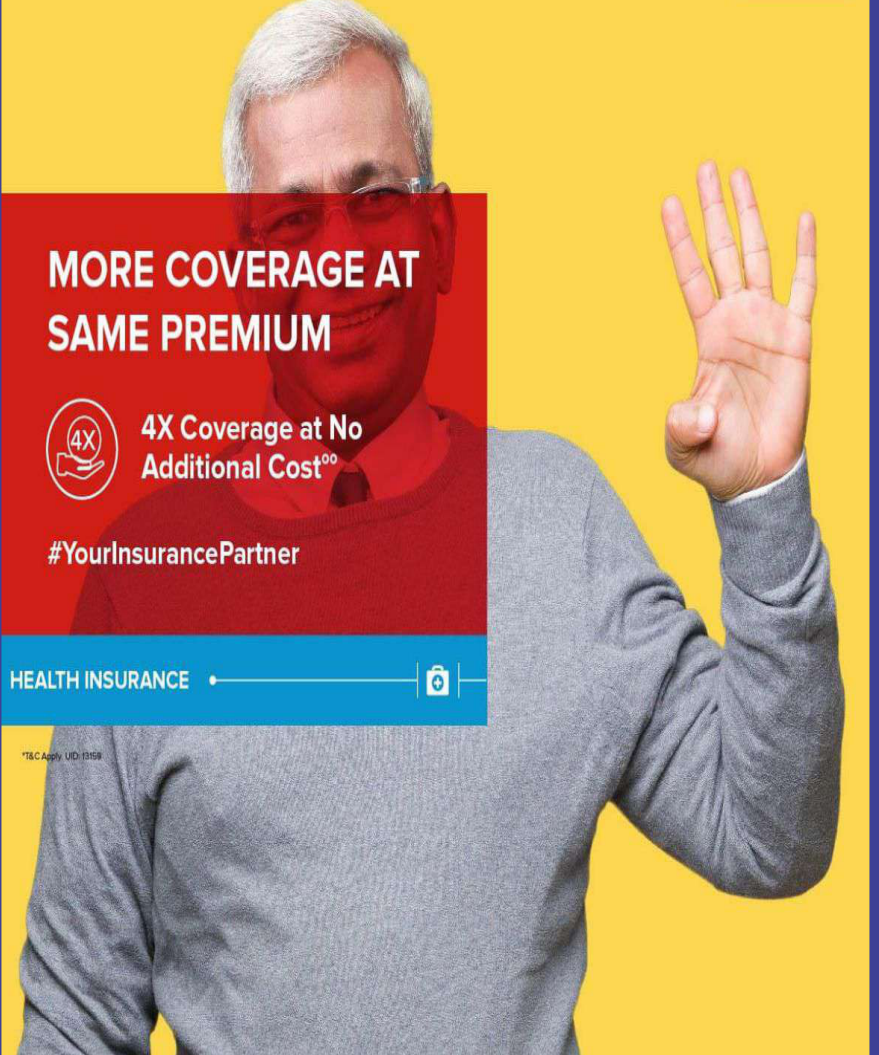
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