

Anytime is The Right Time for-SIP

FIXED DEPOSIT | MUTUAL FUND | LOANS | COMMODITY | STOCKS | INSURANCE | BONDS / IPO

Are you planning to save money? Are you looking to accumulate some amount to fulfill your financial dreams? Are you looking to get some amount saved in case of any contingencies? Are you planning your retirement? If the answer to any or all of the above question is **YES**, then you are at the right place. You can do all that by start investing in Mutual Funds through SIPs. SIP or Systematic Investment Plan is a way to invest your money in the Mutual Funds in the form of a fixed amount in a fixed period of intervals. You can start investing in Mutual Funds with a SIP amount as low as Rs. 500 per month. Read below to know how SIP is beneficial for you.

JANUARY-2023: SIP of Rs.5000/pm <i>Funds has been arranged on the basis of 5 year performance</i>	NAV as on	5 Years	XIRR	7 Years	XIRR	10 Years	XIRR
		Rs. 300000		Rs. 420000		Rs.600000	
EQUITY : LARGE & MID FUND	02-01-23	SIP Value	%	SIP Value	%	SIP Value	%
Quant Large & MidCap Gr	75.50	507,385	21.81	792,787	18.21	1,593,471	18.82
SBI Large & MidCap Reg Gr	396.56	470,858	18.64	739,902	16.23	1,367,977	15.95
Mirae Asset Emerging BlueChip Reg Gr	97.35	462,653	17.90	764,310	17.16	1,682,095	19.84
Kotak Equity Opp Gr	208.82	453,354	17.05	716,454	15.31	1,321,996	15.31
Canara Robeco Emerging Equities Reg Gr	162.88	444,467	16.22	715,096	15.25	1,520,492	17.94
EQUITY : LARGE CAP FUND							
Canara Robeco Bluechip Equity Reg Gr	42.13	433,141	15.13	699,043	14.61	1,226,622	13.89
Kotak Bluechip Gr	385.33	432,385	15.06	676,354	13.66	1,189,478	13.31
SBI Blue Chip Reg Gr	63.89	431,966	15.02	668,959	13.35	1,210,920	13.65
Mirae Asset Large Cap Gr	80.54	424,320	14.27	680,532	13.84	1,281,683	14.72
Axis BlueChip Reg Gr	43.77	396,619	11.46	650,141	12.53	1,154,724	12.75
EQUITY : MIDCAP FUND							
Quant MidCap Gr	139.76	596,028	28.71	946,056	23.28	1,622,304	19.16
SBI Magnum MidCap Reg Gr	145.12	497,679	20.99	746,551	16.49	1,443,626	16.97
Kotak Emerging Equity Sch Gr	76.58	494,772	20.74	782,658	17.84	1,608,225	18.99
HDFC Mid-Cap Opportunities Gr	103.44	493,134	20.60	765,268	17.19	1,506,251	17.76
Axis MidCap Reg Gr	66.63	449,298	16.67	744,604	16.41	1,437,074	16.88
FLEXI CAP FUND :							
Quant Flexi Cap Gr	64.74	599,516	28.97	962,774	23.78	1,872,461	21.84
HDFC Flexi Cap Gr	1160.06	485,059	19.90	758,413	16.94	1,339,523	15.56
Canara Robeco Flexi Cap Reg Gr	226.32	435,987	15.41	705,995	14.89	1,239,478	14.09
Kotak Flexi Cap Gr	55.31	423,839	14.23	669,888	13.39	1,259,681	14.40
SBI Flexi Cap Reg Gr	76.74	420,833	13.93	659,361	12.94	1,244,296	14.16
EQUITY : SMALL CAP FUND							
Quant Small Cap Gr	147.41	716,508	36.78	1,083,470	27.19	1,771,746	20.81
Nippon India Small Cap Gr Gr	93.57	573,772	27.07	926,601	22.68	2,050,765	23.55
Kotak -Small Cap Gr	163.38	541,634	24.59	849,196	20.17	1,675,242	19.76
SBI Small Cap Reg Gr	114.47	530,323	23.69	879,870	21.19	2,009,338	23.16
DSP Small Cap Reg Gr	114.16	511,410	22.14	772,724	17.47	1,649,417	19.47
EQUITY : FOCUSED FUND							
HDFC Focused 30 Gr	134.51	480,911	19.53	721,499	15.51	1,249,393	14.24
Quant Focused Gr	59.06	475,183	19.03	742,916	16.35	1,438,682	16.90
Nippon India Focused Equity Gr Gr	81.82	461,875	17.83	715,103	15.26	1,387,873	16.23
SBI Focused Equity Reg Gr	230.48	422,798	14.12	685,599	14.05	1,291,109	14.86
Axis Focused 25 Reg Gr	39.42	367,924	8.36	600,196	10.25	1,103,132	11.88
EQUITY : ELSS FUND							
Quant Tax Gr	249.92	625,025	30.78	1,023,671	25.55	2,076,642	23.78
IDFC Tax Advtg (ELSS) Reg Gr	102.19	479,334	19.40	758,976	16.96	1,396,548	16.34
Canara Robeco Equity TaxSaver Reg Gr	117.89	459,252	17.59	745,203	16.43	1,329,758	15.42
SBI Long Term Equity Reg Gr	239.86	448,394	16.58	684,347	14.00	1,192,725	13.36
Axis Long Term Equity Reg Gr	65.11	378,911	9.57	610,390	10.73	1,170,174	13.00

SIP is a powerful tool of wealth creation over the long term. It makes investing a habit.

Small investments made at regular intervals can grow to a large amount over a period of time due to power of compounding.

Almondz Financial Services Ltd
Website: <http://www.almondzwealth.com>

Mumbai
Tel: 022-2287 0993

New Delhi
Tel: 011-43500700

Lucknow
Tel: 0522-4073825

Kolkata
Tel: 033-22820873-5

Bangalore
Tel: 080-42400900

Ludhiana
Tel: 0161-4646900

Mutual Fund investment is subject to market risk. Please read the scheme related document carefully before investing. The above data is for information purpose only. NAV as on 2ND Jan 2023