



MONTHLY NEWSLETTER

Monthly Newsletter to manage your personal finances.

India Update

Population Milestone, Positive Market Performance



Navigating the Equity Market performance as on 31st May 2023

Performance snapshot of Indian Equity Market - Nifty & Sensex :

As of 31st May 2023, the Nifty closed at 18,534.40, while the Sensex closed at 62,622.64. Both indices experienced a monthly gain of 2.13% and 2.03%, respectively. However, when we look at the Year-to-Date (YTD) returns from 1st January 2023 to 31st May 2023, we find that both the Nifty and Sensex have delivered approximately 2% returns. This suggests that despite the ups and downs, the market has essentially remained stagnant since the beginning of the year.



Your Name
Designation
Company Name

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Actively Managed Large Cap Mutual Funds Outperformed the Sensex and Nifty (YTD - 1st January 23 till 31st May 23) :

Actively managed large cap mutual funds have proven to be successful in generating better returns than the large cap index in the YTD (1st Jan 2023 till 31st May 2023). This reiterates the popular slogan - "Mutual Fund Sahi Hai!!" (see the table on right)

Funds	YTD (%)
ICICI Prudential BHARAT 22 FOF	11.58
Nippon India Large Cap Fund	7.22
SBI Bluechip Fund	5.80
Bandhan Large Cap Fund - Regular Plan	5.45
HDFC Top 100 Fund	5.04
DSP Top 100 Equity Fund - Regular Plan	4.97
DSP Nifty 50 Equal Weight Index Fund - Regular Plan	4.52
HDFC NIFTY50 Equal Weight Index Fund - Regular Plan	4.51
Aditya Birla Sun Life Nifty 50 Equal Weight Index Fund - Regular Plan	4.41
Tata S&P BSE Sensex Index Fund - Regular Plan	3.78
Kotak Bluechip Fund - Regular Plan	3.75
JM Focused Fund	3.66

List of Top Largecap Funds as on 31st May 2023

Funds	YTD (%)
Motilal Oswal Midcap Fund - Regular Plan	9.34
SBI Magnum Midcap Fund	8.80
Axis Nifty Midcap 50 Index Fund - Regular Plan	8.39
JM Midcap Fund - Regular Plan	7.68
Mahindra Manulife Mid Cap Fund - Regular Plan	7.44
Tata Midcap Growth Fund - Regular Plan	7.19
Axis Midcap Fund	7.18
Nippon India Growth Fund	6.96
Aditya Birla Sun Life Mid Cap Fund	6.85
HDFC Mid-Cap Opportunities Fund	6.74
Bandhan Midcap Fund - Regular Plan	6.73
WhiteOak Capital Mid Cap Fund - Regular Plan	6.36

Top performing Midcap funds as on 31st May 2023

Actively managed Mid Cap Mutual Funds Delivered even Higher Returns than Large Cap Funds (YTD - 1st January 23 till 31st May 23) :

Mid cap mutual funds have exhibited even better returns during the same period. Although mid cap funds come with higher risks, they have also provided higher returns.

(See the table on left)

The Optimal Investment Option : A Blend of Large & Mid Cap Funds, known as Large & Midcap Funds :

While large cap funds are known for their stability, they tend to offer relatively lower returns. On the contrary, mid cap funds can be more volatile but offer higher potential returns. [Therefore, a balanced approach that combines both large and mid-cap funds can provide the best investment option.](#)

(see the table on right)

Here is a list of the top 10 large and mid-cap funds (YTD : 1st January 23 till 31st May 23)

Funds	YTD (%)
Motilal Oswal Large and Midcap Fund - Regular Plan	11.92
Tata Large & Mid Cap Fund - Regular Plan	8.41
Bandhan Core Equity Fund - Regular Plan	8.01
ICICI Prudential Large & Mid Cap Fund	7.71
SBI Large & Midcap Fund	7.60
HSBC Large and Mid Cap Fund - Regular Plan	7.15
HDFC Large and Mid Cap Fund - Regular Plan	7.11
Kotak Equity Opportunities Fund - Regular Plan	7.09

Top Performing Large & Midcap Fund as on 31st May 2023

Conclusion :

In the dynamic world of the Indian stock market, where market indices may showcase minimal growth over certain periods, actively managed mutual funds have proven their ability to outperform the market. By diversifying your portfolio with a mix of large and mid cap funds, you can strike a balance between stability and potential growth. Remember to read the fund details properly and consult with a financial product distributor to determine the best investment strategy based on your risk tolerance and financial goals.