



# Conquer the Mountain of Wealth

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**The Guide**

**The Challenges**

**The Strategy**

**The Instrument**



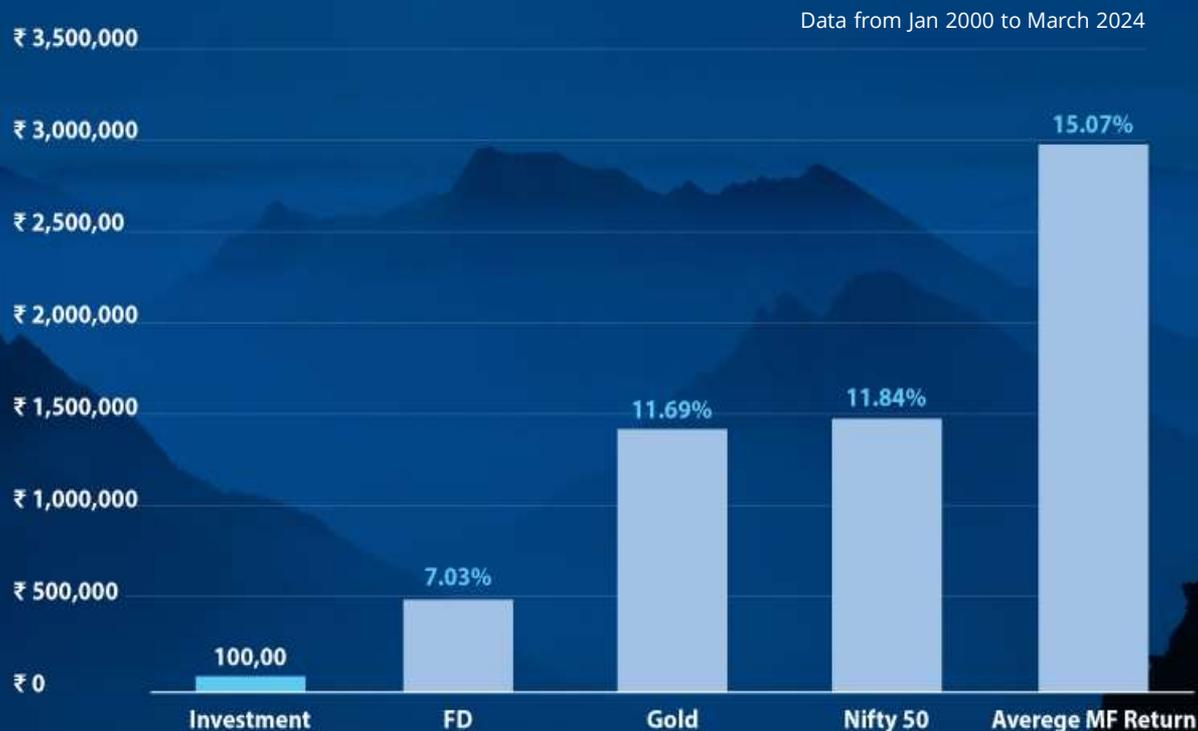
# The Instrument – Equity Mutual Funds



# Equity Mutual Funds



# Historically, equity mutual funds have given better returns than other options



Source: [rbi.org.in](http://rbi.org.in), [gold.org](http://gold.org), [nseindia.com](http://nseindia.com), ACE MF

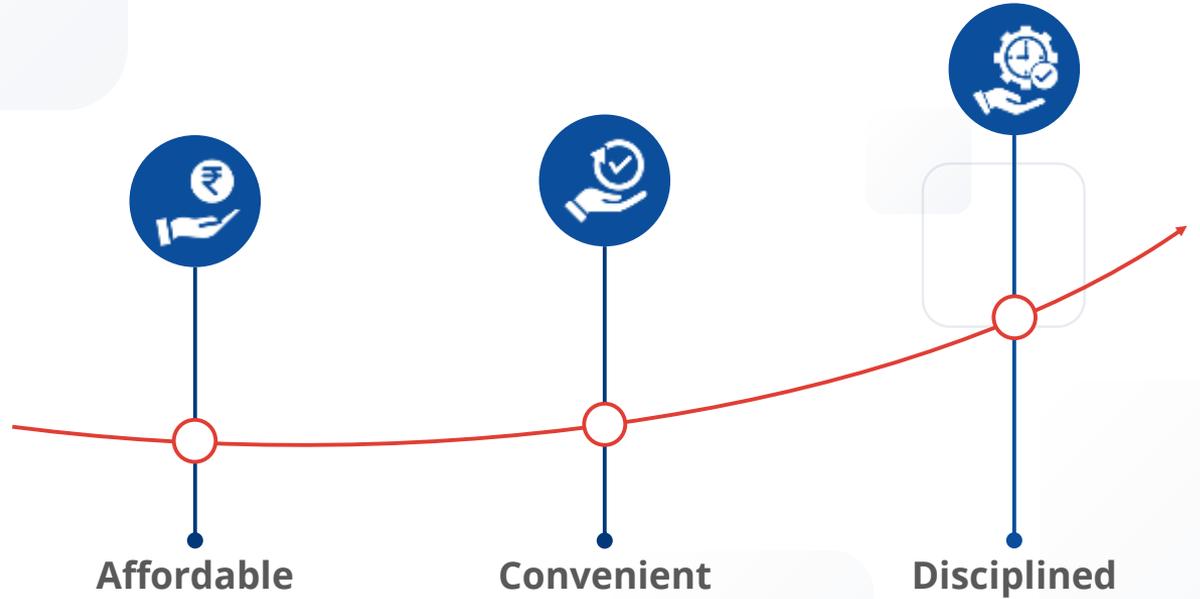
Disclaimer: Mutual Funds are subject to market risk. Please read all documents carefully before investing. Past Performance is not indicative of future returns.



The Strategy:  
Invest through SIP



# Why invest through SIP?



# By investing regularly, you also benefit from Rupee Cost Averaging

Rupee Cost Averaging makes volatility work in your favour



Investing a fixed amount every month ensures that you buy more units when markets are low and buy less units when markets are high



# Historical Wealth Creation by AssetPlus Recommended Funds in the past

## Flexi Cap Funds Performance for a Rs 10,000 per month SIP

Total Amount Invested (Rs)	3 Y	5 Y	10 Y	15 Y	20 Y	25 Y
	₹ 3,60,000	₹ 6,00,000	₹ 12,00,000	₹ 18,00,000	₹ 24,00,000	₹ 30,00,000
Scheme Name	Value As of Mar 31, 2024 (Rs)					
Franklin India Flexi Cap Fund	₹ 5,07,952	₹ 10,98,069	₹ 28,87,968	₹ 68,86,836	₹ 1,59,13,958	₹ 5,31,03,999
HDFC Flexi Cap Fund	₹ 5,34,746	₹ 11,56,220	₹ 30,76,464	₹ 70,10,094	₹ 1,68,32,944	₹ 6,35,06,395
JM Flexi Cap Fund	₹ 5,58,171	₹ 11,85,778	₹ 33,35,339	₹ 72,87,272	-	-
Parag Parikh Flexi Cap Fund	₹ 4,98,744	₹ 11,07,825	₹ 33,79,004	-	-	-
Tata Flexi Cap Fund	₹ 4,55,959	₹ 9,07,413	-	-	-	-
Bank of India Flexi Cap Fund	₹ 5,46,149	-	-	-	-	-

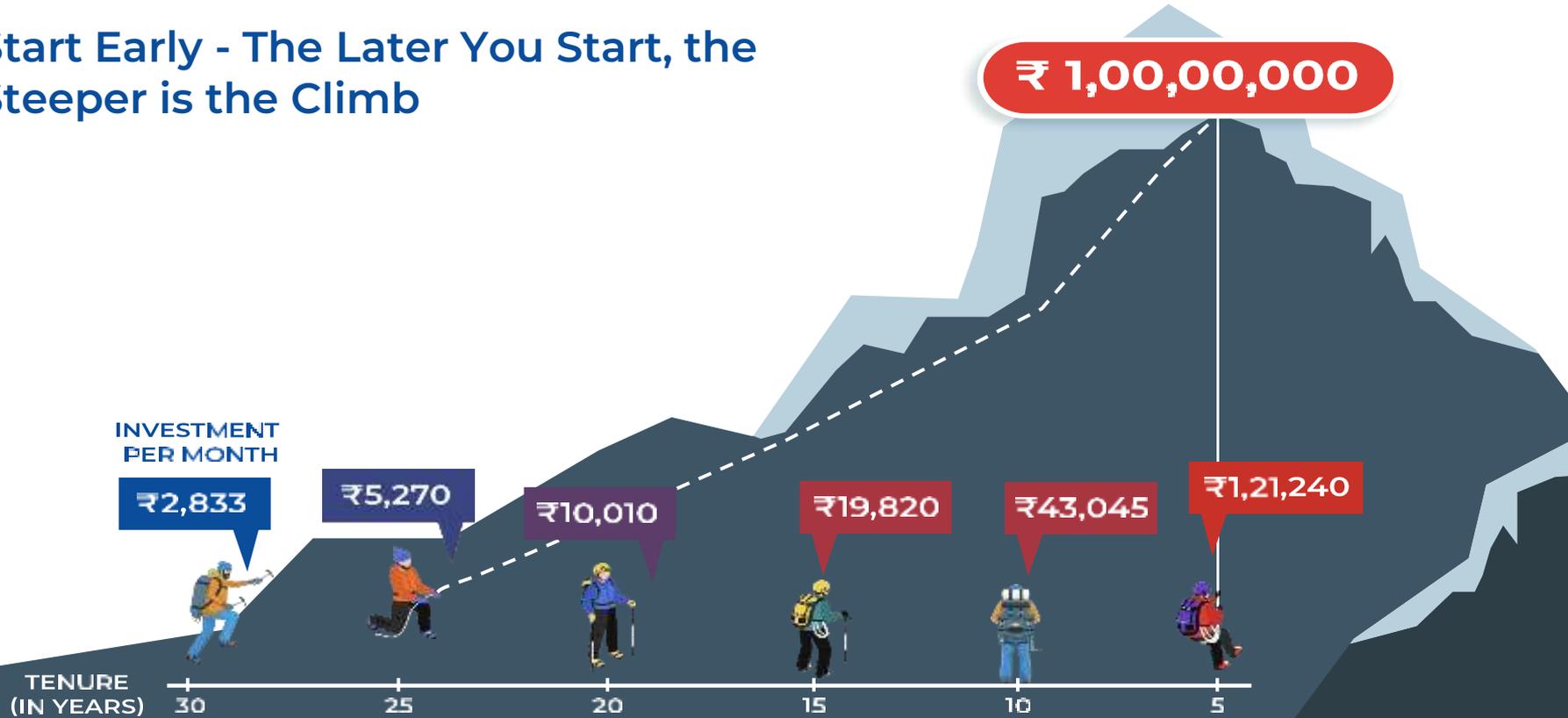
Monthly SIP 10,000 Rs.

Source: ACEMF

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# Start Early - The Later You Start, the Steeper is the Climb



Disclaimer: 12% Return is used only for representation purposes to create an understanding of the compounding rate of return. This should not be construed as an indicative return. The actual return in mutual funds may be different.

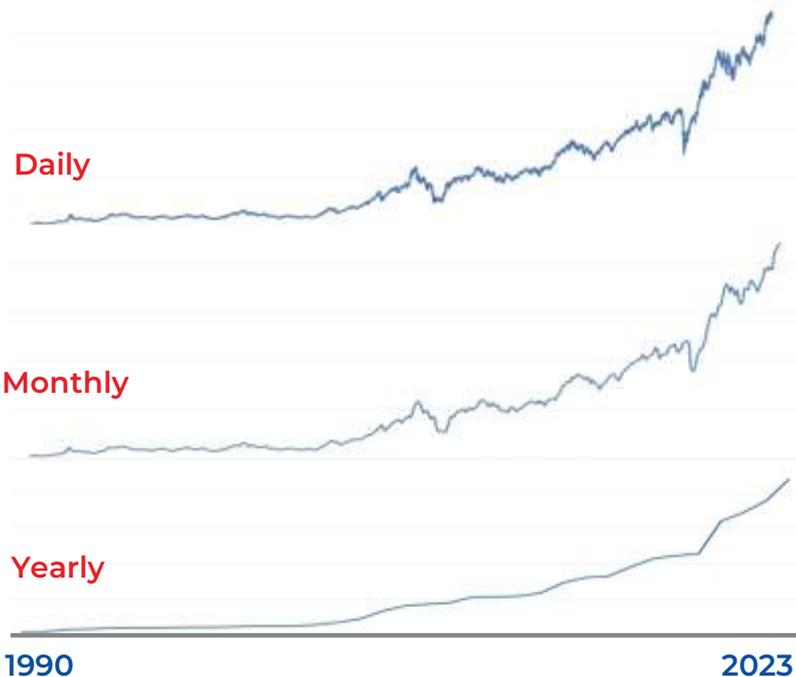


# The Challenge: Volatility & Emergency

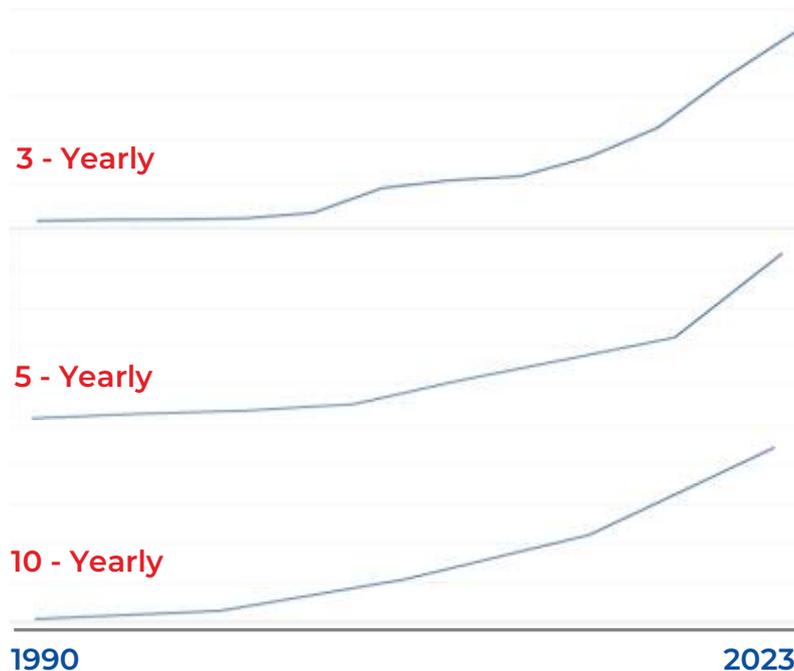


# Volatility of Nifty 50 from 1990 to 2023

Volatility of Nifty50 seems high, in the short run



But, where is the volatility now?



Source: NSE

Disclaimer: Mutual Fund investments are subject to market risks, read all scheme related documents carefully.



# | Emergency – Are you really prepared?



## Health Insurance

They say, most Indians are one health emergency away from bankruptcy. Don't be that Indian. Secure your financial future by investing in **health insurance** today if you haven't already.



## Life Insurance

Ensure your family's financial independence both while you're alive through your earnings and in case of any unforeseen event, with a reliable **life insurance** policy.



# The Guide: Maps Can Be Hard to Read, Hire a Financial Expert

Either wander and get lost, or follow, unworried, the ideal guide.



# Getting Lost is More Probable Than You Think

- ✓ 815+ equity mutual fund schemes
- ✓ Operational hassles
- ✓ Different tax treatment on different products
- ✓ Large amount of contrasting information on the internet
- ✓ Confusing advice by friends and family
- ✓ Lack of time and inclination



# Work with a Guide



## A Mutual Fund Distributor

- ✓ Works with you to identify your investing goals.
- ✓ Helps you navigate the uncertain and complex world of investing.
- ✓ Assists you with the paperwork and operational hassles.
- ✓ Reviews your investment journey and helps make necessary adjustments.
- ✓ Provides ongoing guidance and support to keep you on track with your financial objectives.

“You work hard to earn money, your MFD ensures that your money works hard for you.”



Start your SIP now and  
conquer the range, one  
step at a time



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- ✓ The information, analysis, and estimates contained herein are based on research assessment and have been obtained from sources believed to be reliable.
- ✓ Mutual Fund investments are subject to market risks, read all scheme-related documents carefully.
- ✓ Past performance is no guarantee of future returns.
- ✓ We are an AMFI Registered Mutual Fund Distributor



A panoramic view of a mountain range under a clear blue sky. In the foreground, a rocky mountain peak is partially covered in snow. Three hikers are visible on the peak: one at the top, one on the left, and one on the right. The background shows a vast expanse of rolling mountain ridges, some with snow-capped peaks, stretching towards the horizon. The overall scene is bright and clear, suggesting a sunny day.

# THANK YOU

