SIP IN SMALL CAP FUNDS

Today's large caps were yesterday's small caps. Many of today's small caps shall become tomorrow's large caps. A company that is ranked below the top 250 companies as per market capitalization is known as a small cap company. While several world economies are facing growth challenges, India remains a bright spot for investments. Reports from prominent economists suggest India's GDP to double in the next 10 year. Amid this growth potential, small cap companies may benefit the most.



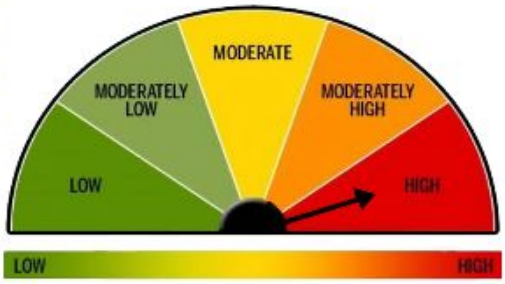
PROPOSAL IN BRIEF



A small cap equity mutual fund is a basket of several small cap companies handpicked by expert fund managers. *Investing in a small cap fund through the SIP route can yield good rewards over the long term.*

RISK FACTOR

Small cap stocks are considered to be more risky as compared to mid caps or large caps. While they may have strong prospect of growing faster, they are also susceptible to higher risk due to being small in size, economies of scale not in their favor, and competition with bigger players. Investing in a basket of small cap companies (through the mutual fund route) can be a better choice as compared to individual stocks. The time horizon should be longer while considering investment in a small cap equity fund.



Jyotiraja Sodha
Shubhchintak
AMFI-Registered Mutual Fund Distributor | ARN-18594
jyotiraja_sodha@hotmail.com **9898398189** **https://shubhchintak.investwell.app/app/#/login**

PAST PERFORMANCE OF SMALL CAP FUNDS CATEGORY

Catogery	3 Year	5 Year	10 Year
Small Cap Fund	30.11	11.67	18.63

Report as on 01/01/2023

If you are interested in starting SIPs in a small cap fund, do let us know and we shall connect with you with specific fund options / more details.

CHOOSE YOUR SIP & TIME PERIOD

SIP Amount : ₹ 10,000/-			
Time Period	Total Amount Invested	Expected Future Value @ 12%	Expected Future Value @ 15%
10 Years	₹ 12,00,000	₹22,50,000	₹ 26,00,000
15 Years	₹ 18,00,000	₹ 47,50,000	₹ 61,50,000
20 Years	₹ 24,00,000	₹ 92,00,000	₹ 1,30,00,000
25 Years	₹ 30,00,000	₹ 1,70,00,000	₹ 2,75,00,000

SIP Amount : ₹ 25,000/-			
Time Period	Total Amount Invested	Expected Future Value @ 12%	Expected Future Value @ 15%
10 Years	₹ 30,00,000	₹ 56,00,000	₹ 66,00,000
15 Years	₹ 45,00,000	₹ 1,20,00,000	₹ 1,55,00,000
20 Years	₹ 60,00,000	₹ 2,30,00,000	₹ 3,30,00,000
25 Years	₹ 75,00,000	₹ 4,25,00,000	₹ 6,90,00,000

Mutual Fund investments are subject to market risks, read all scheme related documents before investing. Returns are not guaranteed. Assumption of returns are at portfolio level. It is not an indication of specific scheme returns. The above chart is for illustration purpose only.
Figures are approximiate. Returns over 1 year are annualized.

Jyotiraja Sodha
Shubhchintak
AMFI-Registered Mutual Fund Distributor | ARN-18594
jyotiraja_sodha@hotmail.com **9898398189** **https://shubhchintak.investwell.app/app/#/login**