

Final SIP Portfolio Report

Final SIP Portfolio with Expected CAGR (5 Years)

Final SIP Portfolio (INR 75,000 Total SIP) with Expected CAGR

Category	Fund Name	Allocation (%)	Monthly SIP (INR)
Small Cap Funds	Nippon India Small Cap Fund	14%	INR 10,500
	Quant Small Cap Fund	10%	INR 7,500
Mid Cap Funds	Edelweiss Mid Cap Fund	6%	INR 4,500
	Motilal Oswal Midcap Fund	6%	INR 4,500
	Kotak Emerging Equity Fund	6%	INR 4,500
Flexi Cap Fund	Parag Parikh Flexi Cap Fund	10%	INR 7,500
Focused Funds	ICICI Prudential Focused Equity Fund	6%	INR 4,500
	HDFC Focused 30 Fund	6%	INR 4,500
Momentum Funds	UTI Nifty200 Momentum 30 Index Fund	8%	INR 6,000
	Motilal Oswal Nifty 200 Momentum 30 Index Fund	8%	INR 6,000
Sectoral Fund	ICICI Prudential Technology Fund	4%	INR 3,000
Global ETFs	Motilal Oswal Nasdaq 100 ETF	6%	INR 4,500
	Mirae Asset NYSE FANG+ ETF	4%	INR 3,000
Gold ETF	SBI/Nippon India Gold ETF	6%	INR 4,500

Expected CAGR (5 Years) for Each Category

Category	Expected CAGR (5Y)
Small Cap Funds	~22-26%
Mid Cap Funds	~18-22%
Flexi Cap Fund	~14-18%
Focused Funds	~14-18%
Momentum Funds	~18-24%
Sectoral Fund (Tech)	~20-25%
Global ETFs	~12-18%
Gold ETF	~8-12%

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Key Insights

- Small & Momentum Funds have the highest growth potential (~22-26% and ~18-24%)
- Mid Caps offer a strong balance (~18-22%)
- Flexi & Focused Funds provide stability (~14-18%)
- Sectoral (Tech) Fund has high upside (~20-25%)
- Global ETFs & Gold ensure diversification (~12-18% & 8-12%)

Portfolio Summary

- Aggressive Equity Allocation (~94%) with Gold ETF Hedge (~6%).
- Balanced mix of Small, Mid, Large, Momentum, and Sectoral Funds.
- Global ETFs provide additional international exposure.
- Expected CAGR for different categories ranges from 8% (Gold) to 26% (Small Cap).
- Potential CAGR for the portfolio: ~20-25% over 5 years.