

Summary:

This Power BI project leverages the **AMFI Equity Mutual Fund Categorization dataset**, which provides detailed information about mutual funds segmented into categories such as Large Cap, Mid Cap, Small Cap, Flexi Cap, Sectoral/Thematic, and more. The dataset includes fund schemes, their returns, benchmark performance, and key risk-adjusted indicators.

The **primary objective** of this dashboard is to evaluate and compare mutual fund performance across categories to identify outperformers, understand risk-return trade-offs, and support informed investment and diversification decisions. The analysis is designed for investors, analysts, and portfolio managers who require an interactive and data-driven view of mutual fund performance.

◆ Methodology and Key Visuals

- **Category-wise segmentation:** Distribution of funds across different AMFI categories for comparative analysis.
- **Return vs. Benchmark Analysis:** Visuals that highlight how each fund performs relative to its benchmark index.
- **Top Scheme Identification:** Ranking funds within each category based on returns and Information Ratio (IR).
- **KPI Cards:** Quick-glance indicators showing average category returns, best IR, and outperforming schemes.
- **Trend Analysis:** Time-based insights into fund consistency and volatility patterns.
- **Interactive Slicers & Filters:** Allowing drill-down by category, fund house, or time horizon for personalized insights.

◆ Insights & Value

The dashboard reveals that **Flexi Cap and Large Cap funds consistently outperform their benchmarks** while maintaining a favourable balance between return and risk. Sectoral funds show high volatility, with strong short-term gains but weaker long-term consistency. Mid and Small Cap funds display potential for higher returns but come with elevated risk.

Executive Insight: *Flexi Cap and Large Cap categories emerge as reliable long-term performers, providing investors with stability, diversification, and superior risk-adjusted returns.*