

CATEGORY REVIEW

OUR TOP PICKS

Canara Robeco Bluechip ★★★★

- This fund has delivered alpha 100 per cent of the time over both the benchmark and category average in every five-year period since its inception.
- A style-agnostic investment approach and disciplined

buy-and-hold strategy have primarily driven its success.

- It fell less than the benchmark during market declines over the last three years.

Edelweiss Large Cap ★★★★

- The fund invests in companies with strong growth potential at reasonable valuations.

- It has been ranked among the top 10 performers in five of the last eight years, showcasing long-term consistency.

ICICI Prudential Bluechip ★★★★★

- It primarily invests in the top 100 stocks, balancing growth and valuations for a disciplined portfolio.
- The fund stays true to large caps with minimal mid- or small-cap exposure.

- It has delivered positive alpha for four consecutive years, a feat matched by only one other fund.
- Maintained its spot in the top 10 funds of the category in 11 of the last 15 years, underscoring its consistency.

Invesco India Large Cap ★★★★

- The fund primarily focuses on growth stocks with selective value opportunities, staying in the top two quartiles for most of the last 10 years.

- It blends a high-churn mid- and small-cap strategy with a buy-and-hold approach for large caps.

Kotak Bluechip ★★★★

- With a strong focus on growth and quality stocks, the fund has outperformed its peers nearly 80 per cent of the time over any five-year period.
- It goes beyond traditional blue chips, targeting the Nifty Next 50 stocks and selectively betting on top

mid caps to unlock growth potential.

- After a dip in performance in 2022 and 2023, the fund bounced back strongly in 2024, comfortably outperforming its index and peers.

Nippon India Large Cap ★★★★★

- The fund has beaten its peers more than 75 per cent of the time over any five-year period. Since March 2023, it has also consistently outpaced its benchmark.
- This outperformance has led to an impressive alpha of 6.55 per cent over the last three calendar years.

- A strategic inclusion of mid- and small-cap stocks has further fueled the fund's success, helping it outpace a few actively managed mid-cap funds over the past decade.

SBI Bluechip ★★★

- It mainly invests in the top 100 stocks but also ventures into mid caps to uncover quality opportunities with a high return potential.
- The fund's winning stocks are well-distributed across large- and mid-cap segments, showcasing an

effective execution of its strategy.

- Although its 2024 performance closely mirrored the benchmark, the fund has managed to outperform the index by about 2 per cent since April 2024 under the new management.

Funds at a glance

| Fund name | Rating | SIP returns (%) | | Risk measures | | Portfolio | | Expense ratio | Assets |
|--|---------|-----------------|------|---------------|-------|--------------|-------------------|---------------|--------|
| | | 3Y | 5Y | Risk grade | Alpha | Sharpe ratio | Avg. no of stocks | | |
| Aditya Birla Sun Life Frontline Equity | ★★★ | 18.3 | 19.5 | Below avg. | 0.9 | 0.7 | 84 | 40 | 1.01 |
| Axis Bluechip | ★ | 14.7 | 14.6 | Avg. | -4.1 | 0.3 | 49 | 51 | 0.69 |
| Bajaj Finserv Large Cap | Unrated | - | - | - | - | - | - | - | 0.61 |
| | | | | | | | | | 1,294 |

CATEGORY REVIEW

| Fund name | Rating | SIP returns (%) | | Risk measures | | | Portfolio | | Expense ratio | Assets (₹ cr) |
|-------------------------------|---------|-----------------|------|---------------|-------|--------------|-------------------|----------|---------------|---------------|
| | | 3Y | 5Y | Risk grade | Alpha | Sharpe ratio | Avg. no of stocks | Turnover | | |
| Bandhan Large Cap | ★★★★ | 21.1 | 20.4 | Below avg. | 1.1 | 0.7 | 53 | 120 | 0.92 | 1,760 |
| Bank of India Bluechip | ★★★ | 19.4 | - | Above avg. | -0.1 | 0.6 | 45 | 53 | 1.03 | 197 |
| Baroda BNP Paribas Large Cap | ★★★★ | 21.6 | 21.0 | Low | 3.5 | 0.9 | 54 | 61 | 0.82 | 2,403 |
| Canara Robeco Bluechip Equity | ★★★★ | 19.6 | 19.6 | Low | 1.4 | 0.7 | 53 | 27 | 0.51 | 14,824 |
| DSP Top 100 Equity | ★★★ | 22.2 | 20.2 | Avg. | 2.8 | 0.8 | 32 | 39 | 1.10 | 4,530 |
| Edelweiss Large Cap | ★★★★ | 19.6 | 20.2 | Below avg. | 2.2 | 0.8 | 80 | 76 | 0.61 | 1,100 |
| Franklin India Bluechip | ★★★ | 17.7 | 18.4 | Below avg. | -0.8 | 0.5 | 42 | 78 | 1.13 | 7,847 |
| Growth Large Cap | ★★★ | 17.5 | 17.6 | Avg. | 0.6 | 0.6 | 36 | 161 | 1.03 | 127 |
| HDFC Large Cap | ★★★★ | 19.1 | 21.1 | Avg. | 3.8 | 0.9 | 46 | 15 | 1.01 | 36,587 |
| HSBC Large Cap | ★★★ | 20.1 | 19.6 | Avg. | 1.1 | 0.7 | 39 | 47 | 1.20 | 1,946 |
| ICICI Prudential Bluechip | ★★★★★ | 20.7 | 21.8 | Low | 3.9 | 0.9 | 66 | 21 | 0.91 | 63,938 |
| Invesco India Largecap | ★★★★ | 22.5 | 21.7 | Below avg. | 1.7 | 0.7 | 49 | 83 | 0.75 | 1,317 |
| ITI Large Cap | ★★★ | 19.2 | - | Avg. | 0.8 | 0.6 | 56 | 89 | 0.61 | 377 |
| JM Large Cap | ★★★★★ | 20.8 | 20.1 | Low | 2.9 | 0.8 | 40 | 191 | 0.66 | 495 |
| Kotak Bluechip | ★★★★ | 19.1 | 19.9 | Low | 1.2 | 0.7 | 62 | 31 | 0.61 | 9,498 |
| LIC MF Large Cap | ★★★ | 15.5 | 16.1 | Avg. | -2.0 | 0.4 | 60 | 83 | 1.01 | 1,474 |
| Mahindra Manulife Large Cap | ★★★ | 17.2 | 18.9 | Below avg. | 0.3 | 0.6 | 41 | 86 | 0.66 | 595 |
| Mirae Asset Large Cap | ★★★ | 15.4 | 17.0 | Below avg. | -1.2 | 0.5 | 70 | 46 | 0.59 | 39,555 |
| Motilal Oswal Large Cap | Unrated | - | - | - | - | - | 36 | 40 | 0.77 | 1,422 |
| Nippon India Large Cap | ★★★★★ | 23.6 | 24.9 | Below avg. | 6.7 | 1.1 | 62 | 17 | 0.66 | 35,313 |
| PGIM India Large Cap | ★★ | 14.9 | 15.9 | Avg. | -1.5 | 0.5 | 39 | 49 | 0.87 | 594 |
| Quant Focused | ★★★★★ | 20.0 | 23.4 | Avg. | 3.5 | 0.8 | 20 | - | 0.68 | 1,118 |
| Quant Large Cap | Unrated | - | - | - | - | - | 23 | - | 0.46 | 2,543 |
| SBI Bluechip | ★★★ | 16.5 | 18.4 | Below avg. | 0.5 | 0.6 | 50 | 22 | 0.81 | 50,502 |
| Sundaram Large Cap | ★★★ | 16.4 | - | Below avg. | 0.0 | 0.6 | 54 | 28 | 0.61 | 3,452 |
| Tata Large Cap | ★★★ | 17.9 | 19.4 | Avg. | 0.5 | 0.6 | 54 | 34 | 1.03 | 2,436 |
| Taurus Large Cap | ★★ | 19.0 | 18.2 | Above avg. | 0.7 | 0.6 | 35 | 69 | 2.45 | 50 |
| Union Largecap | ★★★ | 16.1 | 17.4 | Avg. | -1.3 | 0.5 | 52 | 196 | 1.58 | 438 |
| UTI Large Cap | ★★★ | 14.9 | 16.8 | Avg. | -2.6 | 0.4 | 56 | 38 | 0.94 | 12,860 |
| WhiteOak Capital Large Cap | Unrated | - | - | - | - | - | 70 | 131 | 0.64 | 661 |

Only direct plans considered. Assets, average number of stocks and turnover over the past year as of November 30, 2024. All other data as of December 31, 2024.



**Live your retirement with confidence,
not with financial concern!**

An Investor Education initiative by



Retire Smart
with a steady cash flow

Start a
Systematic Withdrawal Plan (SWP)

Tax Efficiency Capital Appreciation Regular Withdrawals

All Mutual Fund investors have to go through a one time KYC process. For more information and procedures to lodge/redress any complaints, please visit - bit.ly/NJMF-KYC

MUTUAL FUND INVESTMENTS ARE SUBJECT TO MARKET RISKS, READ ALL SCHEME RELATED DOCUMENTS CAREFULLY.