

The heroes and the zeroes

A glance at the best and worst-performing equity funds of 2024



Diversified equity funds: The winners and the losers



| Fund | Category | Return (%)* |
|--------------------------------|----------------|-------------|
| Motilal Oswal Midcap | Mid cap | 55.8 |
| Motilal Oswal ELSS Tax Saver | ELSS | 49.4 |
| Motilal Oswal Large and Midcap | Large & MidCap | 48.7 |
| Motilal Oswal Small Cap | Small cap | 47.8 |
| Invesco India Focused | Flexi cap | 45.0 |
| Invesco India Mid Cap | Mid cap | 44.8 |
| Motilal Oswal Flexi Cap | Flexi cap | 44.6 |
| Bandhan Small Cap | Small cap | 44.5 |
| HSBC Midcap | Mid cap | 40.7 |
| Edelweiss Mid Cap | Mid cap | 40.1 |

*Year-to-date returns as of December 23, 2024

| Fund | Category | Return (%)* |
|------------------------------------|-----------|-------------|
| Quant Active | Multi cap | 12.6 |
| HDFC Large Cap | Large cap | 12.5 |
| SBI Ret. Benefit - Aggressive Plan | Flexi cap | 12.5 |
| UTI Large Cap | Large cap | 12.3 |
| Taurus Mid Cap | Mid cap | 11.6 |
| Nippon India Focused Equity | Flexi cap | 11.4 |
| PGIM India Large Cap | Large cap | 11.1 |
| Quant ELSS Tax Saver | ELSS | 10.1 |
| Samco ELSS Tax Saver | ELSS | 10.0 |
| Samco Flexi Cap | Flexi cap | 5.1 |

*Year-to-date returns as of December 23, 2024. Only actively managed funds considered.



Sectoral, thematic and international: The top performers and the underachievers



| Fund | Category | Return (%)* |
|---|-----------------|-------------|
| Mirae Asset NYSE FANG+ ETF | International | 57.6 |
| LIC MF Infrastructure Fund | Sectoral-Infra. | 49.4 |
| HDFC Pharma And Healthcare Fund | Sectoral-Pharma | 47.4 |
| ICICI Pru Pharma Healthcare & Diagnostics | Sectoral-Pharma | 44.5 |
| Union Innovation & Opportunities | Thematic | 42.3 |
| HDFC Defence | Thematic | 42.1 |
| LIC MF Healthcare | Sectoral-Pharma | 41.4 |
| UTI Healthcare | Sectoral-Pharma | 40.6 |
| SBI Healthcare Opportunities | Sectoral-Pharma | 40.3 |
| Bandhan Infrastructure Fund | Sectoral-Infra. | 40.3 |

*Year-to-date returns as of December 23, 2024. FoFs have been excluded.

| Fund | Category | Return (%)* |
|--|------------------|-------------|
| SBI Nifty Private Bank ETF | Sectoral-Banking | 0.4 |
| ICICI Prudential Nifty FMCG ETF | Thematic | 0.1 |
| Franklin India Feeder Templtn Europa Opp | International | -1.4 |
| Kotak International REIT FOF | International | -3.2 |
| Mirae Asset Glob Elec & Aut Veh ETFs FoF | International | -4.3 |
| Invesco Ind-Invesco Pan European Eqt FoF | International | -6.6 |
| DSP Global Clean Energy Fund of Fund | International | -6.6 |
| DSP World Mining Fund of Fund | International | -7.8 |
| Mahindra Manulife Asia Pacific REITs FoF | International | -9.6 |
| HSBC Brazil Fund | International | -28.4 |

*Year-to-date returns as on December 23, 2024

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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.