

Performance Summary of Mutual Funds in India

Overview

The data represents the average returns of various mutual funds in India over 1-year, 3-year, and 5-year periods. The funds span a range of categories including equity, sector-specific, balanced, and tax-saving funds.

Key Observations

1-Year Average Returns:

Highest Positive Return:

Principal Emerging Bluechip Fund Direct Growth: 41.77%

Quant Active Fund Direct Growth: 12.41%

Lowest Negative Return:

Aditya Birla Sun Life Digital India Fund Direct Growth: -13.63%

Franklin India Technology Fund Direct Growth: -18.37%

3-Year Average Returns:

Highest Return:

Quant Small Cap Fund Direct Plan Growth: 54.37%

Principal Emerging Bluechip Fund Direct Growth: 22.81%

Lowest Return:

Aditya Birla Sun Life Digital India Fund Direct Growth: 27.0%

Nippon India Japan Equity Fund Direct Growth: 2.79%

5-Year Average Returns:**Highest Return:**

Quant Small Cap Fund Direct Plan Growth: 22.73%

ICICI Prudential Technology Direct Plan Growth: 28.0%

Lowest Return:

Aditya Birla Sun Life Digital India Fund Direct Growth: 27.02%

Nippon India Japan Equity Fund Direct Growth: 5.81%

Top Performing Funds:**Quant Small Cap Fund Direct Plan Growth:**

1-Year: 9.98%

3-Year: 54.37%

5-Year: 22.73%

Principal Emerging Bluechip Fund Direct Growth:

1-Year: 41.77%

3-Year: 22.81%

5-Year: 20.68%

ICICI Prudential Technology Direct Plan Growth:

1-Year: -14.6%

3-Year: 29.99%

5-Year: 28.0%

Worst Performing Funds:

Aditya Birla Sun Life Digital India Fund Direct Growth:

1-Year: -13.63%

3-Year: 29.0%

5-Year: 27.02%

Franklin India Technology Fund Direct Growth:

1-Year: -18.37%

3-Year: 21.01%

5-Year: 19.69%

Nippon India Japan Equity Fund Direct Growth:

1-Year: -22.7%

3-Year: 2.79%

5-Year: 5.81%

Sector-Specific Observations:

Banking & Financial Services:

HDFC Capital Builder Value Fund Direct Plan Growth: 4.41% (1-Year), 19.13% (3-Year), 11.66% (5-Year)

SBI Banking & Financial Services Fund Direct Growth: 4.0% (1-Year), 15.76% (3-Year), 12.99% (5-Year)

Technology:

ICICI Prudential Technology Direct Plan Growth: -14.6% (1-Year), 29.99% (3-Year), 28.0% (5-Year)

Quant Small Cap Fund Direct Plan Growth: 9.98% (1-Year), 54.37% (3-Year), 22.73% (5-Year)

Infrastructure:

HDFC Infrastructure Direct Plan Growth: 19.75% (1-Year), 17.56% (3-Year), 4.19% (5-Year)

ICICI Prudential Infrastructure Direct Growth: 22.31% (1-Year), 25.5% (3-Year), 13.88% (5-Year)

Conclusion

The performance of mutual funds in India shows significant variability based on fund category, investment strategy, and market conditions. While some funds, particularly in the technology and small-cap segments, have delivered substantial returns over the years, others, especially those heavily invested in specific sectors like banking and financial services, have shown more moderate gains. Investors should consider their risk appetite, investment horizon, and the specific fund's historical performance when choosing mutual funds.