

The quarterly investment performance report for Mr. Rohan Iyer reflects an encouraging upward trend in his diversified portfolio. His major holdings include 120 shares of Reliance Industries Ltd., purchased at an average price of ₹2,300 per share. As of 31 March 2025, the stock traded at ₹2,650 per share, giving an unrealized gain of ₹42,000. Additionally, Mr. Iyer invested ₹50,000 in the SBI Balanced Advantage Fund, which has appreciated to ₹58,500 this quarter, representing a 17% growth. His fixed deposit at HDFC Bank, amounting to ₹1,00,000, yields a 6.7% annual interest rate, generating quarterly interest of ₹1,675. Furthermore, his mutual fund in Axis Bluechip Fund worth ₹75,000 has grown by 8%. The report also notes that Rohan received ₹5,000 in quarterly dividends from his equity holdings. Considering total assets, the current market value of the portfolio stands at ₹2,33,175, compared to an investment value of ₹2,00,000, achieving an overall return of approximately 16.5%. The report concludes with recommendations for rebalancing, suggesting increased exposure to mid-cap funds and reduced dependency on fixed deposits for maximizing returns in the next quarter.