

SIP BREWERY - Portfolio Allocation

Asset Allocation & Fund Overlap Analysis

Current Asset Allocation

65%

Equity

20%

Debt

10%

Hybrid

5%

Others

Sectoral Exposure

Banking: 25%

IT Services: 18%

Pharmaceuticals: 12%


FMCG: 10%


Automotive: 8%

Others: 27%




High Overlap Detected

HDFC Top 100 ↔ SBI Blue Chip: 78% overlap

 Medium Overlap
ICICI Value ↔ Axis Midcap: 45% overlap

 Low Overlap
Small Cap ↔ Large Cap: 12% overlap

AI Diversification Insights

-  Consider reducing overlap between large-cap funds by switching one to mid-cap category
-  Your sectoral allocation is well-balanced with no single sector exceeding 25%
-  Add international exposure through global funds for better diversification