

# 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