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Output for new investors



Mutual Fund Recommendation

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☒ New Investor ☐ Existing Investor



New Investor Recommendation

Budget:

900000

Risk Level:

High

▼

Asset Class:

Hybrid

▼

Market Cap:

Focused/Value

▼

Get Recommendations

Budget:

900000

Risk Level:

High

Asset Class:

Hybrid

Market Cap:

Focused/Value

Get Recommendations

Recommended Funds

#	Scheme Name (ID)	NAV (₹)	Units
1	axis retirement fund - aggressive plan - regular plan - idcw (ID: 147824)	18.41	48886
2	axis retirement fund - aggressive plan - direct plan - idcw (ID: 147822)	20.02	44955
3	canara robeco consumer trends fund - direct plan - idcw (payout/reinvestment) (ID: 118274)	86.48	10407
4	canara robeco consumer trends fund - regular plan - idcw (payout/reinvestment) (ID: 112153)	47.34	19011
5	icici prudential technology fund - direct plan - idcw (ID: 120595)	139.05	6472

Budget:

900000

Risk Level:

High

Asset Class:

Index/ETF

Market Cap:

Mid/Small Cap

Get Recommendations



Recommended Funds

#	Scheme Name (ID)	NAV (₹)	Units
1	dsp nifty next 50 index fund - regular plan - idcw (ID: 146383)	22.30	40360
2	groww nifty total market index fund - direct plan - idcw (ID: 152125)	13.71	65624
3	dsp nifty next 50 index fund - direct plan - idcw (ID: 146382)	22.81	39454
4	nippon india nifty next 50 junior bees fof - direct plan - idcw option (ID: 146515)	25.17	35757
5	nippon india nifty next 50 junior bees fof - idcw option (ID: 146512)	24.79	36301



New Investor Recommendation

Budget:

648000

Risk Level:

Medium

Asset Class:

Specialized

Market Cap:

Large Cap

Get Recommendations



Recommended Funds

#	Scheme Name (ID)	NAV (₹)	Units
1	uti - unit linked insurance plan- direct (ID: 120784)	45.51	14239
2	uti - unit linked insurance plan (ID: 100646)	42.06	15407
3	uti retirement fund- direct plan (ID: 120766)	53.63	12083
4	uti retirement fund - regular plan (ID: 100682)	49.68	13043
5	bandhan retirement fund - direct plan - idcw (ID: 152104)	12.85	50412

Output for existing investors



Mutual Fund Recommendation

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☐ New Investor ☒ Existing Investor



Existing Investor Analysis

Select Scheme Name:

edelweiss liquid fund - direct plan - idcw option



NAV at Purchase:

1947.02

Units Held:

600

Purchase Date:

02/01/2024



Analyze



Existing Investor Analysis

Select Scheme Name:

edelweiss liquid fund - direct plan - idcw option



NAV at Purchase:

1947.02

Units Held:

600



Purchase Date:

02/01/2024



Analyze



Analysis Result

Current Fund ID: 140198

Scheme Name: edelweiss liquid fund - direct plan - idcw option

NAV at Purchase: ₹1947.02

Latest NAV: ₹3424.51

Top Similar Fund: N/A

 **Recommendation:** Hold

 **Reason:** Current fund still performs well.



Existing Investor Analysis

Select Scheme Name:

hsbc infrastructure fund - regular idcw



NAV at Purchase:

40.82

Units Held:

1000

Purchase Date:

15/05/2023



Analyze



Analysis Result

Current Fund ID: 151038

Scheme Name: hsbc infrastructure fund - regular idcw

NAV at Purchase: ₹40.82

Latest NAV: ₹36.72

Top Similar Fund: mahindra manulife aggressive hybrid fund - regular plan - idcw

🚩 Recommendation: Switch

📘 Reason: Better fund found.