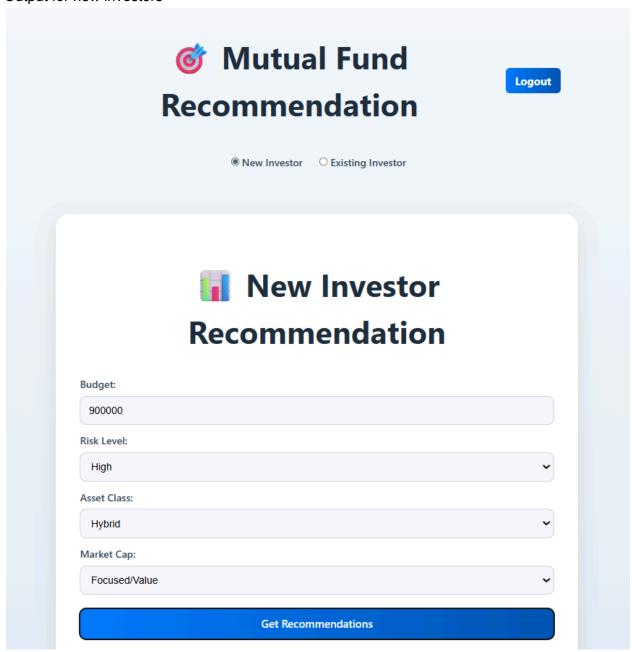


Output for new investors



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:

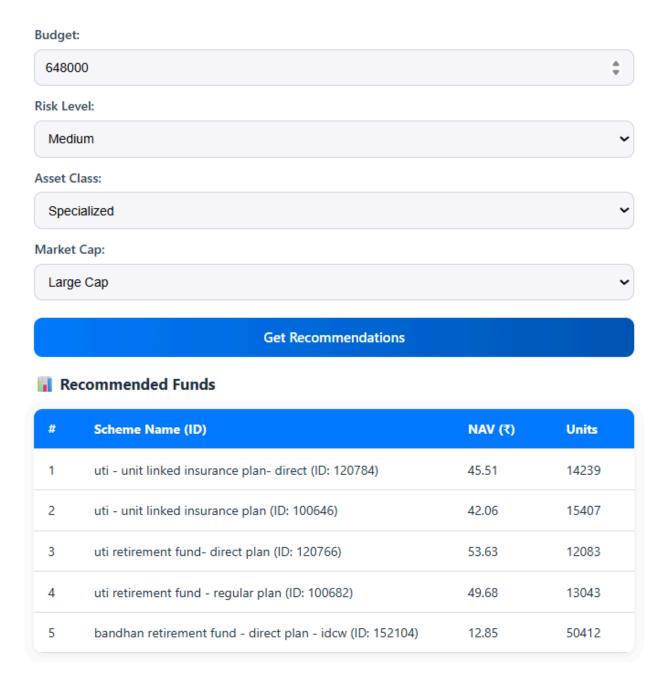
Mid/Small Cap

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



Output for existing investors





O New Investor Existing Investor



Analyze

Purchase Date:

02/01/2024



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.



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.