

DALAL STREET INVESTMENT JOURNAL

DEMOCRATIZING WEALTH CREATION

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Special Report

Is It Time To Play
The Defensive Sector?



Analysis

Zomato Ltd.

Special Feature

Oil & Gas Industry

Cover Story

Beating The Market With Sector Rotation



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Understanding The Functioning Of Loan Against Mutual Funds

INSIDE
Mutual Fund Awards 2024

Cover Story

Calm Amidst Chaos: Your Mutual Fund Roadmap



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Celebrating Mutual Fund Excellence

Indian equity markets have shown remarkable resilience amidst recent challenges. Despite dips following election results, reactions to the Union Budget, and the more recent global downturn driven by a mix of factors, the Indian market has remained strong. A key factor behind this stability is the continuous inflow of domestic funds into the equity market, with mutual funds playing a pivotal role. Particularly, the Systematic Investment Plan (SIP) route has grown significantly, now exceeding ₹23,000 crore.

The surge in SIP inflows is driven by an improved investment experience for investors. Mutual fund schemes are now more tailored to diverse needs, helping investors not only achieve their financial goals but also build wealth for future generations. While historically, intergenerational wealth was passed down through physical assets, mutual funds have emerged as a powerful tool for this purpose.

Fund houses and managers have been crucial in delivering this enhanced investment experience. As the industry's product manufacturers, they shape its growth and ensure that investors have access to high-quality opportunities.

In this special issue, we honour these key players through the DSIJ Mutual Funds Award, recognizing excellence across various categories. The awards are based on a rigorous methodology that evaluates both long-term and short-term returns, along with the risks taken to achieve those returns. While these awards are not direct recommendations, they offer valuable insights for further research before making investment decisions.

As we celebrate the mutual fund industry's achievements, we encourage investors to continue exploring the diverse offerings available, ensuring their investment journey remains prosperous and fulfilling.

Sashikant Singh

Sashikant Singh
Executive Editor

Sector Funds for Long-term Wealth Creation

Your cover story in the previous edition was an interesting read and discovered many facets of sector funds. But my point of contention is - Can sectoral mutual funds create wealth in the long term?

- Sudhir Kamat

Editor Responds : Sectoral funds can indeed contribute to long-term wealth creation, but they come with higher risks compared to diversified funds. These funds invest exclusively in specific sectors like technology, healthcare, or energy, which means that if the chosen sector performs well, the returns can be substantial and potentially outperform the broader market. However, this focused investment also makes sectoral funds more volatile, as they rely heavily on the performance of a single sector. Sectors often go through cycles of growth and decline, and during periods of underperformance, sectoral funds can experience significant losses.

Therefore, while sectoral funds offer high growth potential, they are better suited for investors with a strong understanding of the sector and a higher tolerance for risk. For those looking to build long-term wealth, these funds can be a valuable part of a broader investment strategy but should be balanced with more diversified investments to manage risk.

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