

INVESTMENT PROPOSAL

PREPARED BY : NIDHEESH SAXENA

27 JUNE, 2022

RATIONALE

The market is heading towards a bearish grip, with the Nifty falling by 20% from its recent highs and S&P Small Cap Index falling by 15% from its recent highs. As a result, many shares are trading far lower than their actual value. Such volatile conditions allow the market to bounce back and generate extraordinary returns, making it an ideal investment period.

Although these conditions are severe and worrying for existing investors, they can invest for long-term gains by buying the dip. Currently, the global markets are falling due to trade restrictions, Forex volatility and blockage in the worldwide supply chain, not allowing companies to function at their optimum level. Once the global markets recover, it would enable the companies to perform at their true potential raising the value of their shares.

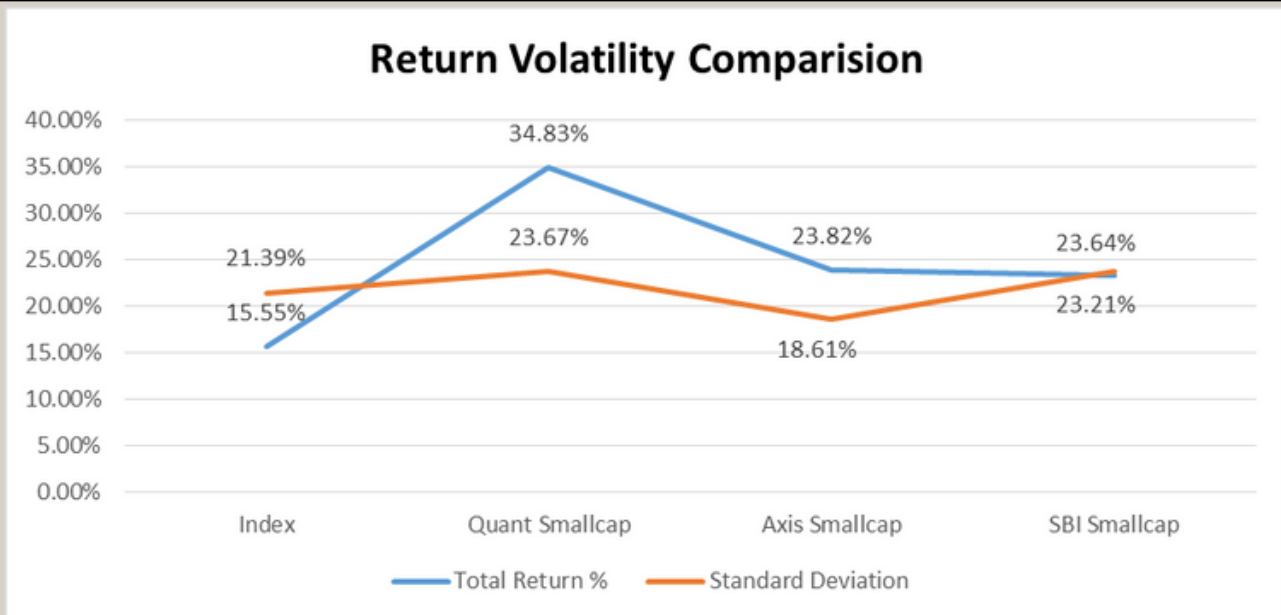
Small-cap funds have the highest capacity to generate long-term returns. These mutual funds invest in companies with the highest growth potential but also have increased risk. During such volatile conditions, one can expect significant profits, but during the time invested may also experience losses. Trusted and tested Fund managers and houses make the following funds an ideal investment.



IDEAL SCHEMES



Ideal Scheme	Lump sum (3 Yr Annual Return)	Standard Deviation	SIP (3 Yr Annual Return)
Axis Small Cap (₹)	23.82%	18.61%	25.41%
SBI Small Cap (₹)	23.21%	23.64%	25.60%
Quant Small Cap (₹)	34.83%	23.67%	42.98%



GOALS

To generate long term wealth by

- using the volatile market conditions
- Investing in high return stocks and funds
- Buy funds at discounted prices maximising gain potential