

INVESTMENT PROPOSAL

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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. 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.

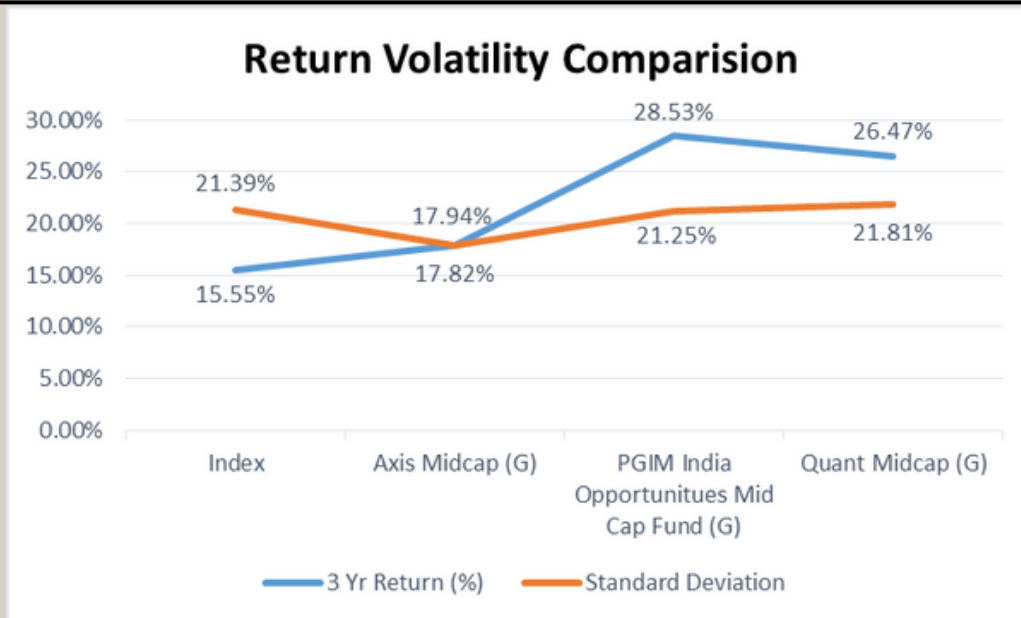
Mid-cap funds have significant growth potential and can generate extraordinary returns in the long run. Mid-cap Funds invest in mid-sized companies that can go on to become market leaders. However, their smaller size makes them more likely to fall prey to challenging market conditions. With experienced Fund managers and trusted Fund houses, such investments become lucrative for long-term returns.



IDEAL SCHEMES



Ideal Scheme	Lump sum (3 Yr Annual Return)	Standard Deviation	SIP (3 Yr Annual Return)
Axis Mid Cap (G)	17.82%	17.94%	15.38%
PGIM India Opportunitues Mid Cap Fund (G)	28.53%	21.25%	30.75%
Quant Mid Cap (G)	26.47%	21.81%	30.30%



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