LIQUID TALK

INVESTMENT PROPOSAL

PREPARED BY : NIDHEESH SAXENA | 12 JULY, 2022

RATIONALE

Large-cap funds are ideal for investors looking to invest in equity funds but want less risk. Such funds invest in large-cap companies in India that provide consistent returns and declare regular dividends. Large Cap funds aim to generate long-term capital gains by investing in equities. Such funds offer comparatively low returns, but the returns are consistent, and the risk is reduced. The investor should be willing to experience losses when invested with the Fund.

Concerning the current market conditions, the shares of large-cap companies are trading at high discounts. Making it favourable for new investors to start investing and allowing them to generate returns with the recovering market. The discounted prices are because of the high volatility in the stock market due to the fear of recession, disruption of the global supply chain from the ongoing international conflicts and the alarmingly high inflation rate.
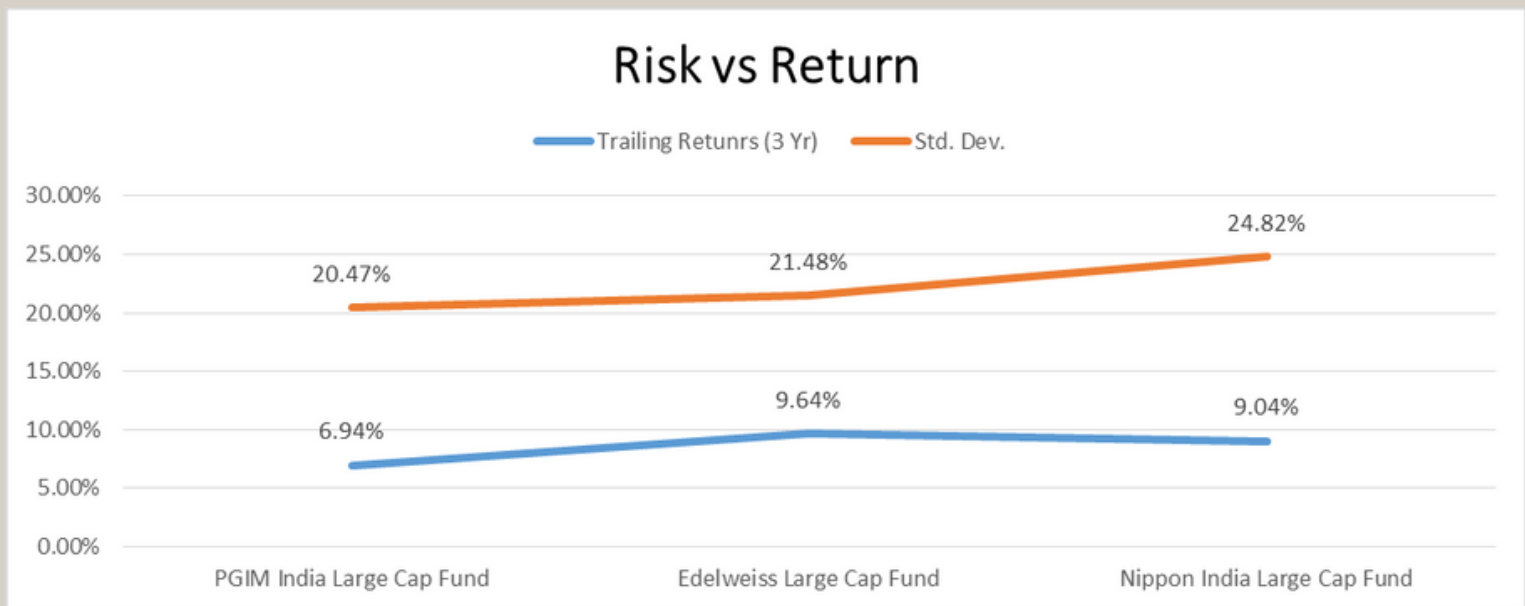
Dividend declaring large-cap funds distribute their profits to the investors as a dividend. Such funds are ideal for investors looking for regular returns from their investments or a second source of income. However, the frequency and amount of dividends depend on the performance of the Fund. Funds don't need to declare a dividend. The following funds have offered regular dividends in the past.
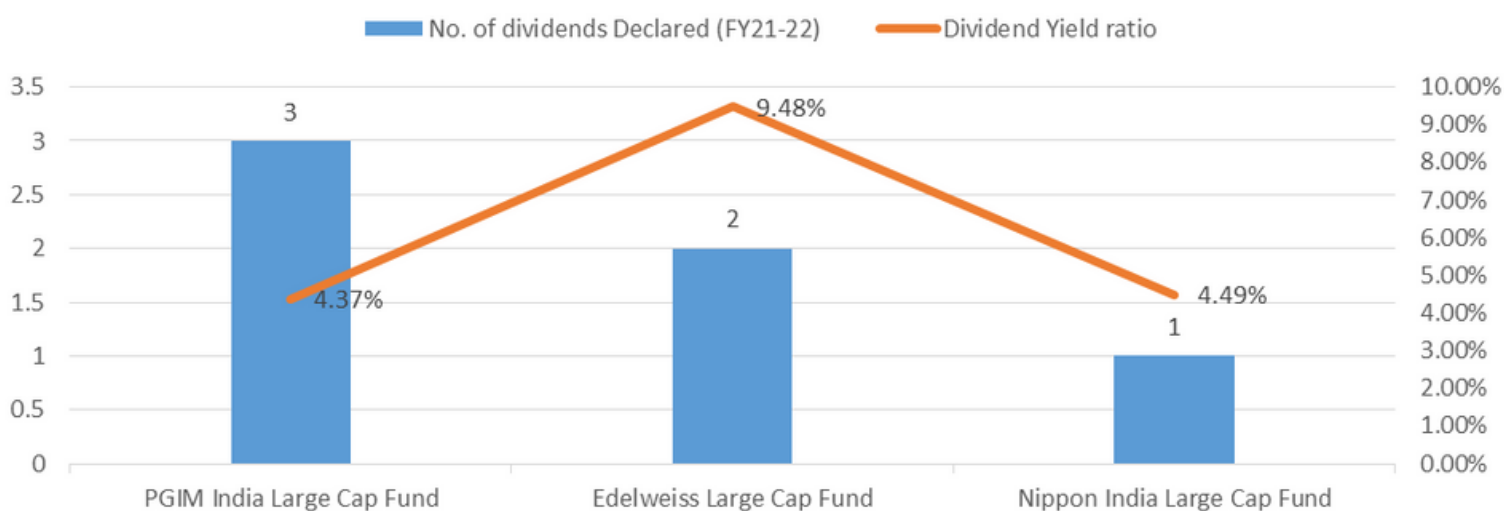
IDEAL SCHEMES

Ideal Scheme	Trailing Returns (3 Yr)	Standard Deviation
PGIM India Large Cap Fund (D)	6.94%	20.47%
Edelweiss Large Cap Fund (D)	9.64%	21.48%
Nippon India Large Cap Fund (D)	9.04%	24.82%

Risk vs Return

—— Trailing Retunrs (3 Yr) —— Std. Dev.

	PGIM India Large Cap Fund	Edelweiss Large Cap Fund	Nippon India Large Cap Fund
Std. Dev.	20.47%	21.48%	24.82%
Trailing Returns (3 Yr)	6.94%	9.64%	9.04%

Fund Name	No. of dividends Declared (FY21-22)	Dividend Yield ratio
PGIM India Large Cap Fund (D)	3	4.37%
Edelweiss Large Cap Fund (D)	2	9.48%
Nippon India Large Cap Fund (D)	1	4.49%

Dividened Comparision

No. of dividends Declared (FY21-22) — Dividend Yield ratio

3
2
1
4.37%
9.48%
4.49%

PGIM India Large Cap Fund   Edelweiss Large Cap Fund   Nippon India Large Cap Fund

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

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