

Angel - Mutual Fund Research & Advisory

Five Unique MF Model Portfolios for Investors based on their Risk-Return Appetite

Angel - MF Model Portfolio seeks to help investors achieve their financial goals

Investment Planning



Objective of Model Portfolio

- ❖ Profile the investor by understanding his,
 - Investment Objective
 - Priorities & financial goals
 - Investment horizon & Risk tolerance
- ❖ Provide Optimal Asset Allocation
- ❖ Position right MF portfolio to investors.
- ❖ Enable investors to achieve their Financial Goals

Balancing Various Parameters



Parameters

- ❖ Financial Goals
- ❖ Investment Time Horizon
- ❖ Need for Liquidity
- ❖ Safety / Risk tolerance
- ❖ Inflation Protection
- ❖ Principle Protection

Investor Profile

Super Aggressive

Risk Appetite : Very High
Returns Expected: Superior Risk adjusted Returns
Time Horizon : 3 Years & above

Aggressive

Risk Appetite : High
Returns Expected: High Risk adjusted Returns
Time Horizon : 3 Years & above

Balanced

Risk Appetite : Moderate
Returns Expected: Capital Protection & Balanced returns
Time Horizon : 3 Years & above

Moderate

Risk Appetite : Low to Moderate
Returns Expected: Capital Protection & Moderate returns
Time Horizon : 3 Years & above

Conservative

Risk Appetite : Risk Averse
Returns Expected: High Capital Protection & Moderate returns
Time Horizon : 3 Years & above

M F Portfolio Composition

100% Equity

Pure-Large Cap 40%
Large-Mid Cap 40%
Flexi Cap 20%

80% Equity – 20% Debt

Equity Diversified 50%
Balanced 30%
Index 10%
MIP 10%

60% Equity – 40% Debt

Equity Diversified 30%
Balanced 30%
Index 10%
MIP 20%
Income 10%

40% Equity - 60% Debt

Equity Diversified 10%
Balanced 20%
MIP 30%
Income & Gilt 20%
Floating Rate & Short Term Debt 20%

20% Equity – 80% Debt

Equity Diversified 10%
Balanced 10%
MIP 30%
Income & Gilt 30%
Floating Rate & Short Term Debt 20%

For Model Portfolio Recommendation

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