

Swatantra Kumar Explains

How to read a Closed-Ended Fund's brochure

Mutual Funds are subject to market risks. Please read the offer document carefully. But how do you read it? Here's how:



INVESTMENT OBJECTIVES:

Understand the objectives of the Fund. Check if it matches your financial motives.

INVESTMENT STRATEGIES:

The outlined strategies give you an idea about the Fund's performance.

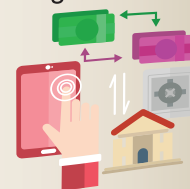


RISK FACTORS:

Don't take more risk than you can handle. Assess if you can tolerate the potential risks mentioned.

FEES AND EXPENSES:

Understand the charges that you would be paying. These include the entry load, exit load, and other management charges.



TAXATION:

Not all Schemes are taxed the same. Know how a particular Fund might affect your Taxes.

FUND MANAGEMENT:

Know the Fund Manager-both their investment style and their history. This is important for earning attractive returns.



Scan this QR code to read more on Closed-Ended Funds.

Steps to download and scan a QR code:

- 1) Download QR code app on your phone.
- 2) Run app and scan the QR code.
- 3) Your smartphone reads the code & navigates to the destination.



IN THE NEXT EDITION: Time flies! We are already nearing the festive season, starting with Navratri and Dussehra. Let's apply some of Indian mythology's key lessons to money matters.

Mutual Fund investments are subject to market risks, read all scheme related documents carefully.