



अगदी सुरुवातीलाच गुंतवणूक करा

HSBC Mid Cap Fund

Mid Cap Fund – An open ended equity scheme predominantly investing in mid cap stocks

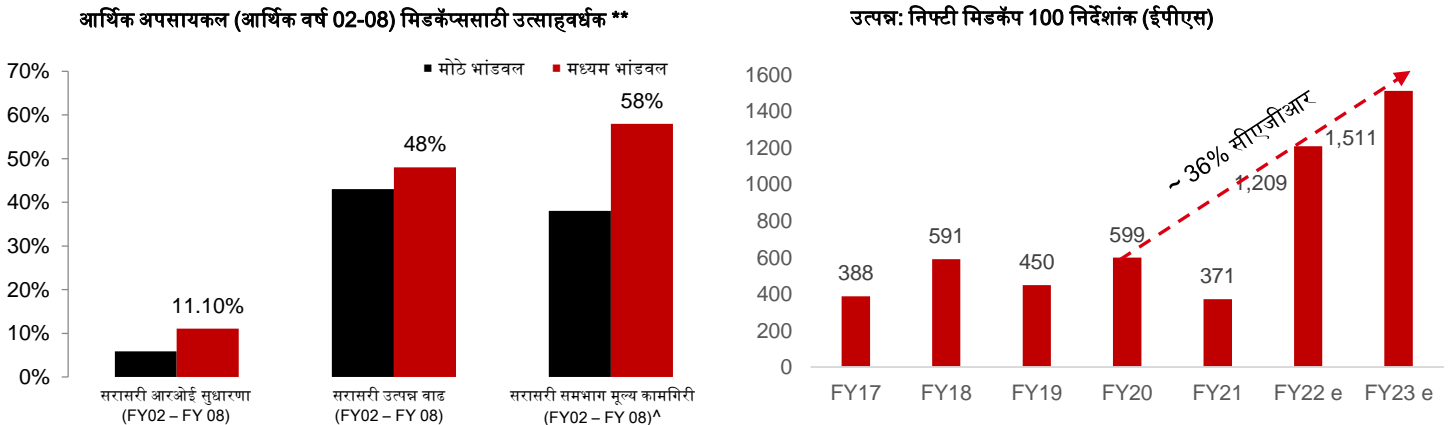
एनएफओ: 6 - 20 September 2021 | पुन्हा उघडण्याची तारीख: 29 September 2021

एनएफओ नोटेची तारीख : August 2021

विस्तारकारक अर्थसंकल्प, जागतिक प्रगती आणि कमी भांडवली खर्च अर्थव्यवस्थेला विस्तार टप्प्याकडे नेतोय

- 20 वर्षांतील नीचांकी भांडवली खर्च
- आरबीआयची अनुकूल भूमिका
- उच्च जागतिक प्रगती आणि पुढे लक्षणीय वाढ
- भारताची निर्यात: आतापर्यंतची सर्वांत जास्त April-June 2021 95 अमेरिकन डॉलर
- दुसऱ्या/ तिसऱ्या तिमाहीत भक्कम चक्रीय प्रगतीची शक्यता
- विस्तारकारक बजेट:** दीर्घकालीन संरचनात्मक वाढीला अनुकूल
- मजबूत भांडवली खर्च** (आर्थिक वर्ष 08 नंतर दिसलेले सर्वाधिक)
- आर्थिक वर्ष 22-23 दरम्यान **उत्पन्नात** लक्षणीय वाढीची शक्यता
- चक्रीय पुनरुज्जीवन अनेक वर्षांचे **उत्पन्न दर्शविते.**
- भारत: आतापर्यंतची सर्वाधिक परदेशी गुंतवणुकीची** आवक \$ 81 बिलियन अमेरिकन डॉलर

विस्तारारम्यान मिडकॅपचे वर्तन- अर्थचक्र वळण घेते तेव्हा मध्यम भांडवली कंपनी मोठ्या भांडवली कंपन्यांच्या तुलनेत वेगाने वाढतात



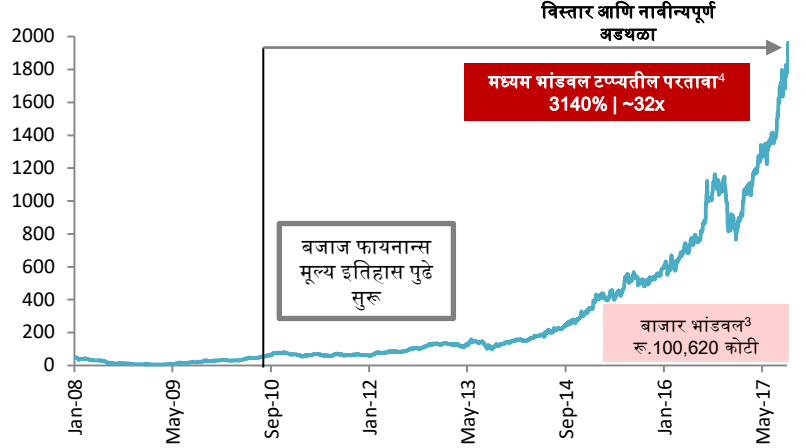
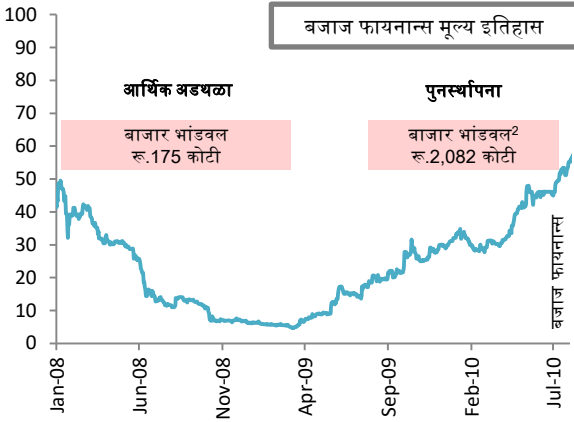
आर्थिक वर्ष 22 आणि आर्थिक वर्ष 23 दरम्यान मिडकॅप समभागांच्या उत्पन्नात लक्षणीय वाढ होणे अपेक्षित आहे.

Chart 1 & 2 - Source: AMBIT Capital Research, Data as at July 2021, **Note: Large-caps are represented by the top 100 stocks on market capitalisation basis & Mid caps are represented by the next 150 stocks based on market capitalisation. ^ Apr '02 to Mar '08. Midcap earnings: MOSL, Nifty Midcap 100 index EPS data, EPS = Earnings Per Share, e = estimates, GDP data: World Bank. For illustration purpose only. Past performance may or may not sustain and doesn't guarantee the future performance.

Source: Bloomberg, MOSL, OECD, Data as at July 2021 except otherwise mentioned. ^^ FY21

अडथळा ते विस्तार (+ 'नाविन्यपूर्ण उद्यमशीलता') – भूतकाळाकडे पहा

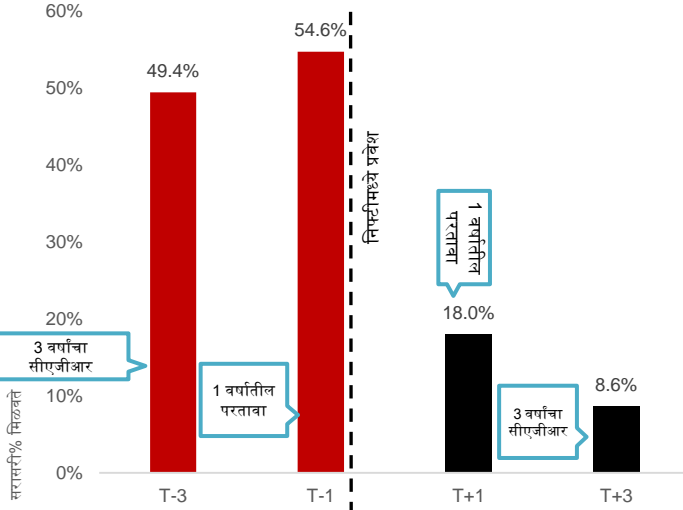
2008: अडथळा ते विस्तारातून भारतातील काही महत्वाच्या कंपन्यांचा विकास झाला. उदा. बाजाज फायनान्स.



मिड कॅप कंपन्यांना लाभ होण्यासाठी नावीन्यपूर्ण उद्यमशीलता आणि विस्तारकारक धोरणे मदत करू शकतात

संक्रमणाच्या टप्प्यात खरी संधी प्राप्त होते - मिड कॅप्सच्या जीवन -चक्रातील सुरुवातीच्या टप्प्यातच त्यात गुंतवणूक करणे हितकारक ठरते.

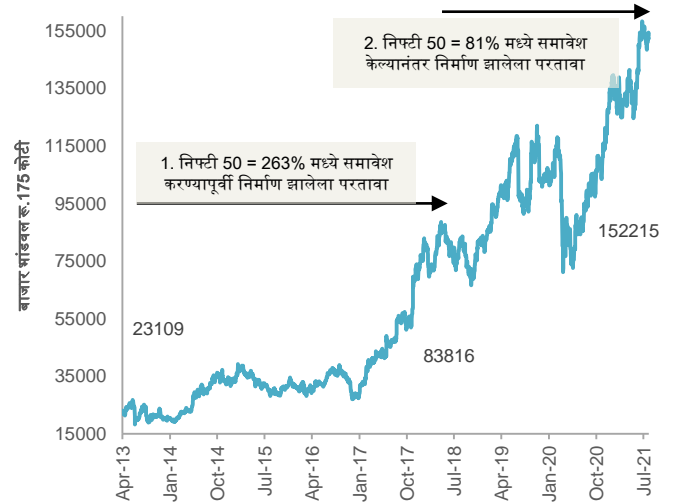
निफ्टीमध्ये प्रवेश करणाऱ्यांची किंमतविषयक कामगिरी (सरासरी)



निफ्टी 50 मध्ये समावेश करण्यापूर्वी

निफ्टी 50 मध्ये समावेश केल्यानंतर

टायटन: आधी आणि नंतर



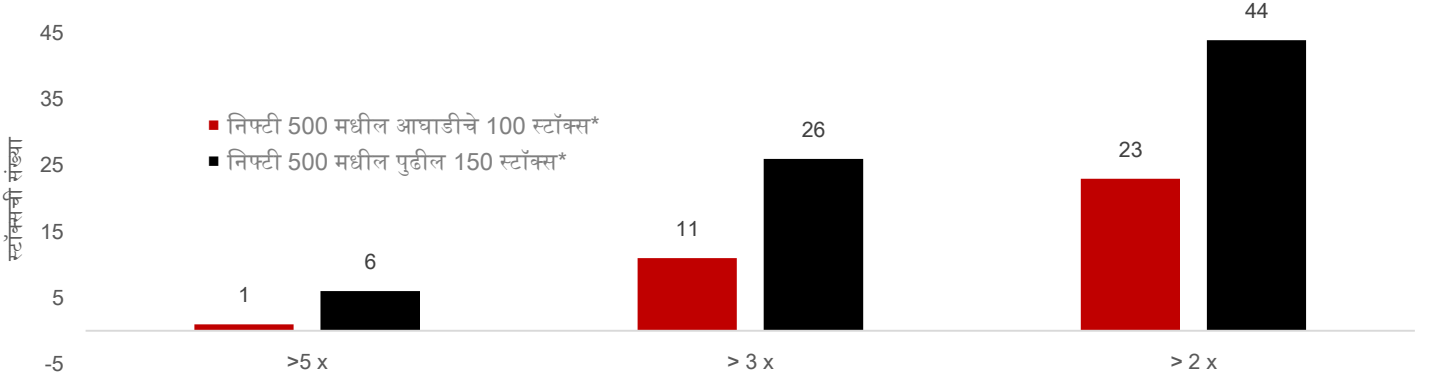
अगदी सुरुवातीलाच गुंतवणूक करा: या समभागांमधील गुंतवणूकीचे मूल्य निफ्टी निर्देशांकात प्रवेश करण्यापूर्वी आहे, नंतर नाही!

Journey of Bajaj Finance Charts: Source: Bloomberg, Data as of 31 July 2021, The above chart and names of the stock is provided for illustration purpose only. Past performance may or may not sustain, past performance does not guarantee the future performance
Market Cap as on 1: 9-03-09, 2: 31-07-10, 3: 28-08-17, Returns: 4: From 1-08-10 to 31-08-17, Mid caps - In India, companies listed on the stock exchanges between 101st - 250th in terms of full market capitalization are called Mid Cap companies (Mid Cap stocks). The above information are for illustrative purpose only and it should not be considered as investment research, investment recommendation or advice to any reader of this content to buy or sell investments. The Fund may or may not have any future position in these stocks.

Transition phase charts: Source: Bloomberg, Data as at July 2021, For Price performance (Aggregate average returns) of all Nifty entrants data from 1 Jan 2001, CAGR returns for 3 year period; T is the date of inclusion in Nifty50, T - 1 (1year prior to inclusion), T - 3 (3 year prior to inclusion), T + 1 (1year after inclusion), T + 3 (3 years after inclusion). Some of the recently entered Nifty50 stocks have not completed 3 years period but their 1 year performance included. Past performance may or may not sustain and doesn't guarantee the future performance. The fund may or may not have future potion in these stocks.

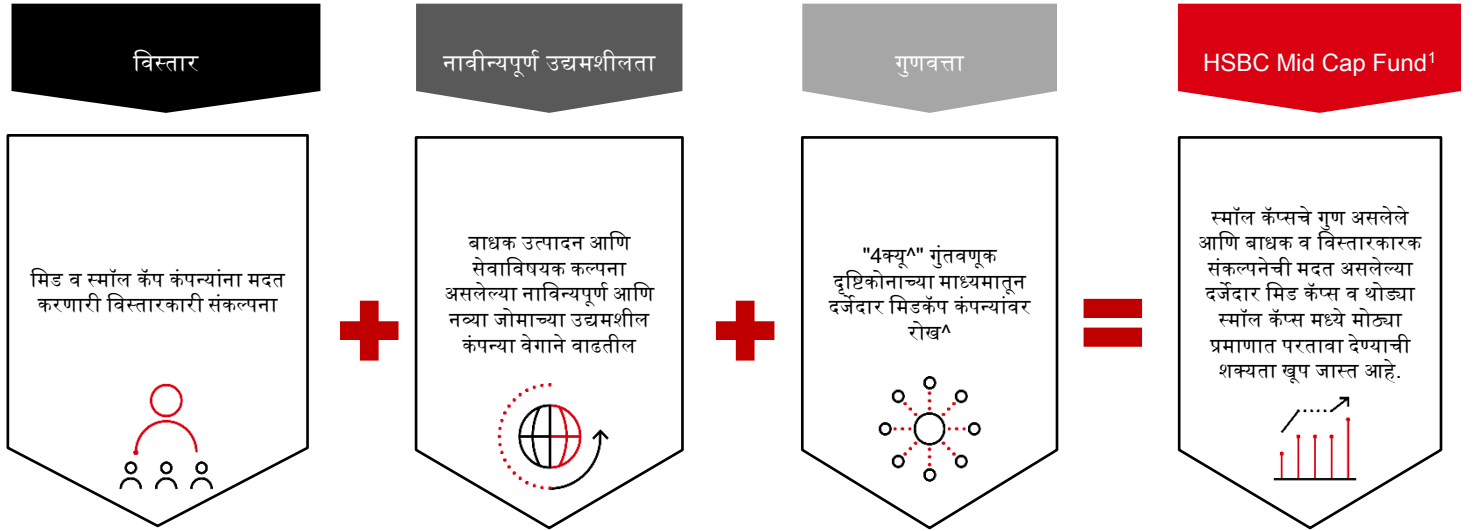
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5 वर्षांच्या काळात अनेक पटींतील वाढ



निफ्टी 500 च्या स्टॉकपैकी आघाडीच्या 100# मधील 23 आणि पुढील 150# मधील 44 स्टॉक्सने गेल्या पाच वर्षांत दुप्पट परतावा दिला आहे

स्मॉल कॅप्सचे गुण असलेल्या दर्जेदार मिड कॅप्स आणि काही स्मॉल कॅप्स मध्ये मोठ्या प्रमाणात परतावा देण्याची क्षमता खूप जास्त आहे.



विस्तार, नवउद्यमशीलता आणि गुणवत्तेवर लक्ष केंद्रित केल्याने HSBC Mid Cap Fund (एचएमएफ) मोठ्या प्रमाणात परतावा देऊ शकतो.

- विस्तार चक्राच्या सुरुवातीला ताजा पोर्टफिलिओ तयार करण्यामुळे होणारा फायदा एचएमएफला अपेक्षित आहे
- स्मॉल कॅप्सचे गुण असलेले दर्जेदार मिड कॅप्स व थोड्या स्मॉल कॅप्समध्ये एचएमएफला मोठ्या प्रमाणात परतावा देण्याची शक्यता.
- आयपीओ बरोबरच नाविन्यपूर्ण व्यवसायांमध्ये संधी शोधता येऊ शकते.
- एचएमएफ मेक इन इंडिया आणि एक्सपोर्ट्स सारख्या संकल्पनांमध्ये गुंतवणूक करू शकतो.

Multibagger opportunities: Source: Bloomberg, Data as at July 2021, *# Nifty 500 index data, Top 100 stocks of Nifty 500, Next top 150 stocks of Nifty 500 in terms of market capitalisation.

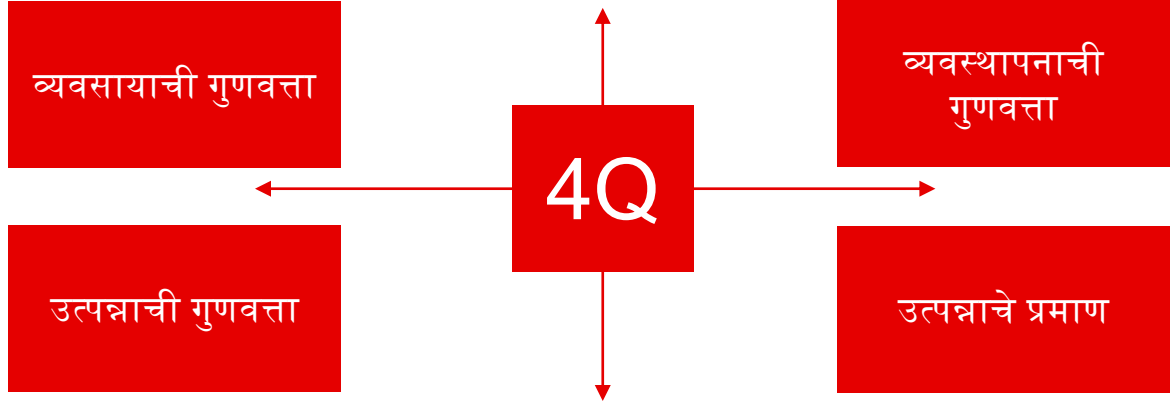
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Quality Mid caps: Source – HSBC Asset Management India, For illustration purpose only., [^]4Q approach – refer to page 4 for details on 4Q approach.

1. Mid Cap Fund – An open ended equity scheme predominantly investing in mid cap stocks

^The scheme has a flexibility to invest anywhere between 65% to 100% in mid cap stocks and upto 35% in debt & money market instruments and stocks other than mid cap stocks i.e. small and large cap stocks. Also the scheme has a provision to invest upto 10% in Units issued by REITs and InvITs. Refer Scheme Information Document for complete investment universe and asset allocation of HSBC Mid Cap Fund. The above view/strategy is as per current view of the investment team and this is subject to change without any notice.

मिडकॅप चांगले आहेत पण गुणवत्ता आणि क्वांटम असलेले मिडकॅप जास्त चांगले आहेत



एचएमएफच्या गुंतवणूकीच्या प्रवासाला मदत करण्यासाठी 4Q: गुंतवणूकीच्या संधी ओळखणे आणि अपघात टाळणे

HSBC Mid Cap Fund - सॅपशॉट

निधीचे नाव	HSBC Mid Cap Fund	योजना कुठे गुंतवणूक करेल? ¹ <ul style="list-style-type: none"> योजनेतील निधी इक्विटी, इक्विटी संबंधित आणि विविध निश्चित उत्पन्न सिक्युरिटीजमध्ये गुंतवला जाईल. या योजनेमध्ये मोठ्या, मध्यम आणि लघु भांडवली कंपन्यांमध्ये गुंतवणूक करण्याची लवचिकता असेल पण मध्यम भांडवली कंपन्यांमध्ये प्रामुख्याने (किमान 65%) गुंतवणूक केली जाईल.³ बॉटम अप दृष्टिकोन: टॉप डाउन व्ह्यूचा आधार असलेला इक्विटी आणि इक्विटीशी संबंधित साधनांमध्ये गुंतवणूक करण्याचा बॉटम अप दृष्टिकोन
बेंचमार्क	निफ्टी मिडकॅप 150 इन्डेक्स टीआरआय	
निधी व्यवस्थापक	अंकुर अरोरा	
एक्झिट लोड ²	शून्य, वाटप झाल्यापासून 1 वर्षानंतर युनिट्स रिडीम / स्विक-आउट केले गेले तर, वाटप झाल्यापासून 1 वर्षाच्या आत युनिट्सचे कोणतेही रिडिमथन / स्विक-आउट केले गेले तर 1%	

- The scheme has a flexibility to invest anywhere between 65% to 100% in mid cap stocks and upto 35% in debt & money market instruments and stocks other than mid cap stocks i.e. small and large cap stocks. Also the scheme has a provision to invest upto 10% in Units issued by REITs and InvITs.
- The exit loads set forth above is subject to change at the discretion of the AMC and such changes shall be implemented prospectively.
- Refer Scheme Information Document for complete investment universe and asset allocation of HSBC Mid Cap Fund.

Scheme Name	Riskometer
<p>HSBC Mid Cap Fund</p> <p>(Mid Cap Fund – An open ended equity scheme predominantly investing in mid cap stocks)</p> <p>This product is suitable for investors who are seeking*:</p> <ul style="list-style-type: none"> Long term wealth creation Investment predominantly in equity and equity related securities of mid cap companies <p>* Investors should consult their financial advisers if in doubt about whether the product is suitable for them.</p>	

Product labelling assigned during the NFO is based on internal assessment of the scheme characteristics or model portfolio and the same may vary post NFO when the actual investments are made.

Disclaimer:

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म्युच्युअल फंडातील गुंतवणूक ही बाजारातील जोखीमीच्या अधीन आहेत, योजनेसंबंधित सर्व दस्तऐवज काळजीपूर्वक वाचावेत.

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