

Newsletter for Investor – September'2021

1. Index Movements:

| Indices | 30 th Sept'21 | 31 st Aug'21 | % Change | International | 30 th Sept'21 | 31 st Aug'21 | % Change |
|-------------------|--------------------------|-------------------------|----------|--------------------|--------------------------|-------------------------|----------|
| S&P BSE Sensex | 59126.36 | 57552.39 | 2.73% | Dow Jones | 33843.33 | 35360.73 | -4.29% |
| S&P BSE Midcap | 25253.09 | 23853.43 | 5.87% | Nasdaq | 14448.58 | 15259.61 | -5.31% |
| S&P BSE Small cap | 28081.74 | 26919.94 | 4.32% | Dax Index | 15260.69 | 15835.09 | -3.63% |
| Nifty 50 | 17618.15 | 17132.20 | 2.84% | Shanghai Composite | 3568.17 | 3541.06 | 0.77% |
| Nifty 500 | 15052.65 | 14555.90 | 3.41% | Hang Seng | 24663.50 | 25768.63 | -4.29% |
| India VIX | 18.40 | 14.52 | 26.72% | Nikkei | 29452.66 | 28080.91 | 4.88% |

2. Commodity Movements:

| Commodity | 30 th Sept'21 | 31 st Aug'21 | % Change |
|-----------------------|--------------------------|-------------------------|----------|
| Gold (10gm) | 47330 | 47500 | -0.35% |
| Silver (1kg) | 58300 | 63500 | -8.18% |
| Crude Oil (Rs/barrel) | 5560 | 5158 | 7.79% |

3. Flows for month of September'21:

| Category | Net Equity | Net Debt |
|----------|------------|----------|
| FII | 7662.70 | 11523.97 |
| MF | 4787.10 | 14594.75 |

4. RBI Update on Monetary Policy

| | 30 th Sept'21 | 31 st Aug'21 |
|------------|--------------------------|-------------------------|
| G- Sec 10Y | 6.223% | 6.215% |

5. Income Tax Update:

| Return Filing | Original Due Date | Extended Due Date |
|----------------|----------------------------|---------------------------|
| Non Audit Case | 31 st July'2021 | 31 st Dec'2021 |
| Audit Case | 31 st Oct'2021 | 15 th Feb'2022 |

Contd. 2

6. Invest in fund with potential to maximize your investment with life cover:

| Unique Feature | UTI – ULIP | LIC - ULIS | Nippon SIP Insure |
|-----------------|---|---|---|
| Eligibility | 12 to 55 Years | 12 to 55 Years | 18 to 51 years |
| Period | 10 years or 15 years | 10 years or 15 years | Cover till 55 year age |
| Premium | Yearly/ Half Yearly/ Quarterly/ Monthly (Rs 1000 to Rs 1 Lakhs) | Yearly/ Half Yearly/ Quarterly/ Monthly (Rs 1000 to Rs 1 Lakhs) | Monthly SIP |
| Insurance Cover | 15 Lakhs and 50000 Accidental | 15 Lakhs | 50 Lakhs |
| Continuance | (12 years to 55 years for 15 Lakhs) Discontinue every premium received for full year but remain invested | (12 years to 55 years for 15 Lakhs) Discontinue every premium received for full year but remain invested | 1 st year- 10 times of monthly SIP 2 nd year- 50 times of monthly SIP 3 rd year – 120 times of monthly SIP |
| Portfolio | Debt Oriented -60% Debt | Equity Oriented -60% - 85% | Equity Oriented – 100% |
| Tax Benefit | Deduction u/s 80C | Deduction u/s 80C | N/A |

Note:

- Invest Rs 1 Lakhs once in ULIP and ULIS each for 31 Lakhs Insurance
- Start SIP Insure of Rs 42000/ month for 3 years in Nippon for free insurance cover.

| Scheme Name | CAGR % | | |
|-----------------------------|---------|--------|---------|
| | 3 years | 5Year | 10 Year |
| UTI ULIP – 10 years | 9.63% | 8.82% | 10.08% |
| LIC – ULIS – 10 years | 15.53% | 12.38% | 11.37% |
| Nippon India Large Cap Fund | 15.23% | 14.37% | 15.94% |

7. List of Upcoming Mutual Fund New Fund Offer in October 2021

| Scheme Name | Launch Date | Closure Date |
|---|-------------|--------------|
| ICICI Pru NASDAQ 100 Index Fund | 27.09.2021 | 11.10.2021 |
| Nippon India Fixed Horizon Fund – XLIII- Series 3 | 30.09.2021 | 05.10.2021 |
| Edelweiss NIFTY PSU Bond Plus SDL Index Fund-2027 | 30.09.2021 | 08.10.2021 |
| Axis AAA Bond Plus SDL ETF -2026 Maturity FOF | 30.09.2021 | 13.10.2021 |

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8. Note from Founder's Desk –

It is important at this time when equity markets has shown extra-ordinary returns. We have to be allocation specific and limit equity exposure to individual suitability and appetite.

We remain bullish on India for today & tomorrow however one should not fear time correction of Markets which is real test of human behaviour.

Thought of the Month:

“First they ignore you, then they laugh at you, then they fight you, then you win.” – Mahatma Gandhi