

## Review of Investments For Dummy Client

### Mutual Fund

Asset Class	Category	Scheme	Performance				
			6 Month	1 Year	3 Year	5 Year	10 Year
Equity	Equity - Flexi Cap Fund	Kotak Flexicap Fund(G)	4.7	20.01	16.24	14.51	17.08
Can hold this scheme.							
Asset Class	Category	Scheme	Performance				
			6 Month	1 Year	3 Year	5 Year	10 Year
Hybrid	Hybrid - Arbitrage Fund	Aditya Birla SL Arbitrage Fund(G)	1.68	4.03	4.7	5.19	6.46
If the time horizon is more than 3 years, it is better to shift to a pure debt fund.							

\*Mutual Fund investments are subject to market risk, read all scheme related document carefully.

### Non Mutual Fund

Product	Comments
Bank Fixed Deposit	We suggest shifting your Bank Fixed Deposit to Debt Mutual Funds.

### Insurance

Product Type	Product Name	Comments
Term Insurance	HDFC Term Insurance	Continue with this cover.