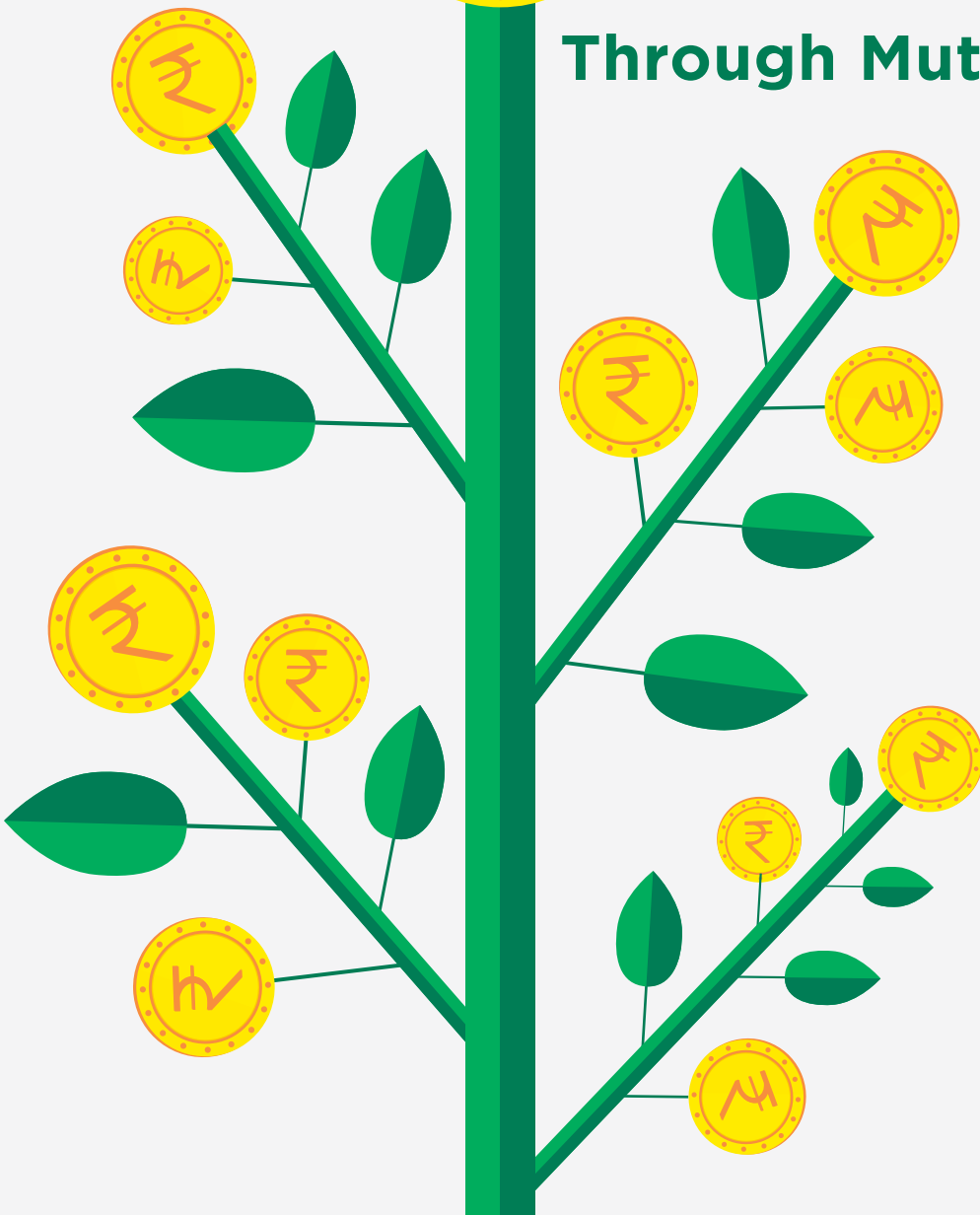




SWAN INVEST

MAKING MONEY

Through Mutual Funds



MUTUAL FUNDS OFFER A VARIETY OF SOLUTIONS TO INVESTORS.



You can create a corpus for your retirement days or generate a regular income, mutual funds can take care of all your financial needs and goals.

A key benefit of this particular financial product is its flexibility and affordability. You can start investing in mutual funds as low as INR 500 per month with an option to discontinue it at any point in time.

Over 2.30 crore people have invested in mutual funds to create wealth and achieve their financial needs and goals.

FAQS

- How can you invest in mutual funds?
- How do mutual funds work?
- What do mutual funds do? How will they benefit you?
- How can mutual funds help you grow your money?
- How to select the right mutual funds?

Making money through mutual funds is your guide on investing that will help you understand the concept of mutual funds and how they work in a very simple and meaningful manner.



HOW DO MUTUAL FUNDS WORK?

- A mutual fund is formed when an asset management company (AMC) pools investments from various individuals and institutional investors with common investment objectives.
- A fund manager handles the pooled investment by strategically investing in securities to generate maximum returns for the investors.
- The investors make money through regular dividends/interest and capital appreciation. They can either choose to reinvest the capital gains via a growth option or earn a steady income by way of a dividend option.



WHY INVEST IN MUTUAL FUNDS?

- **CONVENIENCE**

Investing in Mutual Funds is an easy process. Investors can monitor the market and make investments as per their requirements.

- **LOWER INITIAL INVESTMENT**

You can build a diversified mutual fund portfolio by investing with a minimum of INR 500 a month through Systematic Investment Planning (SIP) in mutual fund schemes of your choice. You can invest in both lump-sum and SIP options.

- **TAX-SAVING**

You get tax deductions under Section 80C of the IT, Act up to a maximum of Rs 1.5 lakh per financial year, for specific financial instruments, and tax-saving mutual funds are one of them.

- **PROFESSIONAL FUND MANAGEMENT**

Your mutual fund investments are managed by a professional fund manager. The fund manager also has a team of researchers who formulate the investment strategy for your asset allocation. The team of researchers picks suitable securities as per the fund's investment objectives.



MUTUAL FUNDS - WHAT ARE THEY?

Mutual funds specialize in investing in stocks, bonds, real estate, gold, etc. There are various types of mutual funds organized for different types of investing strategies. There may be a mutual fund for almost any niche or investing objective you may wish to achieve.



A mutual fund is described as a type of fund set-up that owns other investments.

The fund's management company picks a portfolio manager for the fund and pays them a management fee. The portfolio manager invests the money raised by the fund according to the predefined strategy laid out in a document called the mutual fund prospectus.

MUTUAL FUNDS AND MAKING MONEY



The type of mutual fund in which you invested is the key decider for your returns. If you own a stock fund, potential profit depends on the increase in the stock prices or dividends paid.

If the fund focus is on bonds, income generation is through interest. If the fund specializes in investing in real estate, earning is from rents, property appreciation, and profits from business operations, such as vending machines in an office building.

THREE KEYS TO MAKING MONEY

There are **three major keys** to making money through mutual fund investing. These are:

INVESTING IN FUNDS YOU UNDERSTAND:

If you invest in mutual funds, you should be aware of exactly how that mutual fund invests, what are its underlying holdings and risks. It's much easier to invest when you understand the pool of funds.

THINK LONG TERM

It's much easier to let your wealth compound if you can ride out the sometimes sickening waves of market volatility that is part and parcel of investing in stocks or bonds. If you become emotional and sell your productive assets at the worst possible time, you won't be able to create long-lasting generational wealth.

PAY REASONABLE EXPENSES

Apart from the mutual fund's expense ratio, it is also important to consider a handful of other costs. Tax efficiency, Income needs, Risk exposure are all the points that are needed to be compared with other relevant factors. The goal is to earn more than what you pay for.





SWAN INVEST

SWAN INVEST

email: info@swaninvest.in

web.: www.swaninvest.in

Call: 9977007175

9425060482

P11-12, Ground Floor, B-Block, Metro Tower,
Near Vijay Nagar Square, A.B. Road, Indore (M.P.)-452001