

# Top Performers

## Equity: Small Cap

### RETURNS THREE MONTH (%)

Mahindra Manulife Small Cap - Reg	12.11
HDFC Small Cap Fund - Regular Plan	12.09
Nippon India Small Cap Fund	12.03
ABSL Nifty Smallcap 50 Index-Reg	11.63
Aditya Birla Sun Life Small Cap Fund	11.40
ICICI Prudential Smallcap Fund	11.38
Axis Nifty Smallcap 50 Index - Reg	11.32
Sundaram Small Cap Fund - Reg	11.13
ITI Small Cap Fund - Regular Plan	10.77
HDFC NIFTY Smallcap 250 ETF	10.56

### RETURNS ONE YEAR (%)

HDFC Small Cap Fund - Regular Plan	32.61
Franklin India Smaller Companies Fund	28.99
Nippon India Small Cap Fund	26.39
Tata Small Cap Fund - Regular Plan	26.12
Quant Small Cap Fund	25.75
HSBC Small Cap Fund	21.49
Sundaram Small Cap Fund - Reg	21.01
ITI Small Cap Fund - Regular Plan	20.53
Invesco India Smallcap Fund - Reg	19.46
Edelweiss Small Cap Fund - Reg	19.26

### RETURNS THREE YEAR (%)

Quant Small Cap Fund	62.78
Nippon India Small Cap Fund	48.58
HDFC Small Cap Fund - Regular Plan	45.74
ICICI Prudential Smallcap Fund	45.54
HSBC Small Cap Fund	44.70
Canara Robeco Small Cap Fund - Reg	43.82
Kotak Small Cap Fund - Regular Plan	43.76
Tata Small Cap Fund - Regular Plan	43.46
Franklin India Smaller Companies	43.17
Bank of India Small Cap Fund - Reg	41.58

## Equity: Tax planning

### RETURNS THREE MONTH (%)

Axis Long Term Equity Fund	9.99
LIC MF Tax Plan	9.63
HSBC ELSS Fund	9.05
WhiteOak Capital Tax Saver-Reg	8.80
Bandhan (ELSS) Fund - Regular Plan	8.51
SBI Long Term Equity Fund	8.21
Motilal Oswal Long Term Equity-Reg	8.12
JM Tax Gain Fund	7.97
Invesco India Tax Plan	7.67
Quant Tax Plan	7.28

### RETURNS ONE YEAR (%)

Motilal Oswal Long Term Equity-Reg	20.07
SBI Long Term Equity Fund	19.96
HDFC Tax saver Fund	16.99
Taurus Tax Shield Fund - Regular Plan	16.38
Kotak Tax Saver Regular Plan	16.31
HSBC ELSS Fund	16.19
JM Tax Gain Fund	16.18
Bandhan (ELSS) Fund - Regular Plan	15.88
ITI Long Term Equity Fund - Reg	15.75
Bank of India Tax Advantage-Reg	15.58

### RETURNS THREE YEAR (%)

Quant Tax Plan	41.71
Bandhan (ELSS) Fund - Regular Plan	35.23
Parag Parikh Tax Saver Fund - Reg	29.14
SBI Long Term Equity Fund	28.24
Franklin India Taxshield Fund	28.22
PGIM India ELSS Tax Saver - Reg	28.17
HDFC Tax saver Fund	28.02
Bank of India Tax Advantage - Reg	27.88
Nippon India Tax Saver (ELSS) Fund	27.84
JM Tax Gain Fund	27.68

Source: Value Research

## Average Returns (%)

Data as on 1/6/2023

1-Month	3-Month	One-Year	3-Year	5-Year
Debt: Medium to Long Duration				
1.12	3.50	7.84	4.79	6.36
Debt: Medium Duration				
0.88	3.00	8.10	6.27	5.61
Debt: Long Duration				
1.70	4.62	11.16	4.11	7.25
Equity: Large Cap				
3.74	7.71	12.45	23.36	11.56
Equity: Flexi Cap				
4.11	7.06	12.91	23.94	11.42
Equity: Mid Cap				
5.80	8.33	17.11	31.82	13.31
Equity: Small Cap				
6.30	10.00	17.78	41.44	14.81
Equity: Value Oriented				
3.52	6.13	16.47	28.93	12.41
Equity: ELSS				
3.94	6.66	13.57	25.17	11.49
Hybrid: Aggressive Hybrid				
3.14	5.79	11.62	19.96	10.18
Hybrid: Conservative Hybrid				
1.61	3.81	8.33	9.47	6.95

Source: Value Research