



WELLWORTH {WSSBL}

Headquartered in Mumbai, Wellworth Share & Stock Broking Ltd. (WSSBL) started its operations in 1999. Wellworth provides a bouquet of investment related services to various categories of investors on PAN India basis through both offline and online channels.

Member of :

Bombay Stock Exchange | National Stock Exchange | AMFI & BSE Star Mutual Fund -Empanelled with Mutual Funds | Central Depository Services (India) Ltd | Insurance Regulatory and Development Authority of India

MUTUAL FUNDS

One Stop shop for all your financial needs.

We are registered with BSE STAR MF, which is an online investment platform for Mutual Funds.

On similar lines as shares we also offer online, paper-free investments in Mutual Funds in Demat Form.

Mutual Fund advise will not only be based on the past performance but will also be based on the analysis of current holdings of the scheme.

WHY MUTUAL FUNDS

Mutual Funds are long term wealth creating tool.

Investments via Mutual Funds provide diversification of investments with professional touch.

Carries less risk vis a vis direct equity exposure as the mutual fund scheme is a basket of securities from varied sectors.

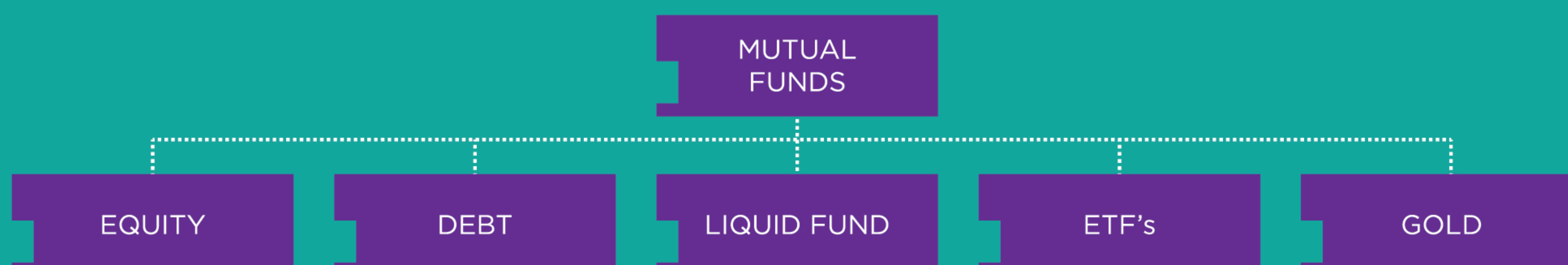
Equities historically have delivered higher compounded returns in the long term compared to other asset classes and thus investments in Equity funds can help generate consistent returns with professional management.

Financial Savings in India will increase as the yields/returns on other asset classes like gold and real-estate is declining.

SIPs are systematic investments made over a longer duration which helps to counter volatility. Investments at regular intervals also leads to rupee cost averaging, as investments are spread across various price points.

Illustration of benefits of early investing through SIPs:

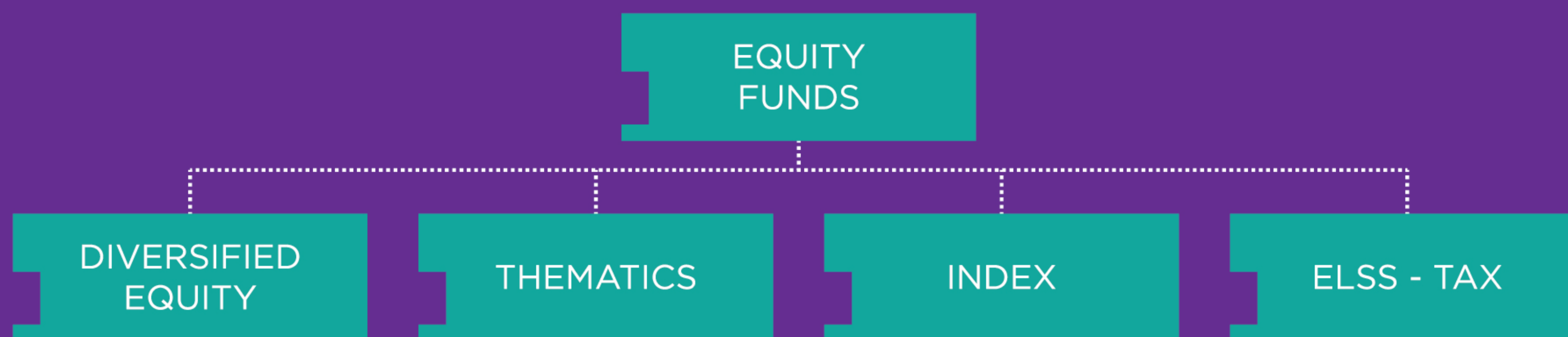
PERIOD	RoI	SIP Amount	Future Value
10 years	12 %	5,000.00	11,50,193.45
5 years	15 %	10,000.00	8,85,745.08



501, 5th FLOOR, AKRUTI ORION, SHRADDHANAND ROAD, VILE-PARLE (E), MUMBAI - 400 057

Call : 022 67159001/06/08/09/97/38 | +91 77383 32255 | Website : www.wellworthgroup.co

Email : mutualfunds@wellworthgroup.co



DIVERSIFIED EQUITY FUNDS

SCHEME TYPE : Diversified Equity Schemes are actively managed funds and they invest in equity shares of companies belonging to diversified sectors, across multi-cap,(Large Cap, Mid-Cap, Small Cap), which are Growth oriented or which are Value Stocks, having good dividend yields.

SCHEME NATURE : Generally Open-ended Schemes.

RISK PROFILE : Diversified Equity Schemes are relatively less volatile and the better managed funds have history of delivering consistent returns over long period of time.

INVESTOR CATEGORY : Diversified Equity Funds are conducive to all class of investors due to their consistency, and diversified risk-profile.

THEMATIC FUNDS

SCHEME TYPE : Thematic Funds too are actively managed funds unless ETFs and this category of mutual fund schemes primarily invest in underlying themes like, Specific Sectors (Banking Funds, Pharma Funds, Power Funds, etc.), Market-Cap Specific (Midcap Funds, Small Cap Funds), Themes like PSUs (investing only in PSUs).

SCHEME NATURE : Generally Open-ended Schemes.

RISK PROFILE : Thematic funds carry higher risk as their fortunes hinge on the performance of the one specific industry or underlying theme.

INVESTOR CATEGORY : Thematic Funds are best fit for Aggressive Investors, Young Individuals generally in their mid 20s who have started their careers or self-employed individuals.

INDEX FUNDS

SCHEME TYPE : Index Funds are passive funds which invest in the shares of the underlying index and mirror the weight-age of the stocks in the index.

SCHEME NATURE : Generally Open-ended Schemes.

RISK PROFILE : Index funds carry lower risk as the investments gets diversified in the select portfolio of stock and also due to its passive nature.

INVESTOR CATEGORY : Index Funds are best suited for Risk Averse investors or those who are nearing their retirement or have already retired.

ELSS FUNDS

SCHEME TYPE : ELSS (Tax Saving) Funds are actively managed funds which invest primarily Large Cap companies having good operating history.

SCHEME NATURE : Close-ended Schemes. (3-year lock-in).

RISK PROFILE : ELSS funds carry moderate risk as the investments are distributed across portfolio of stocks belonging to branded franchises.

INVESTOR CATEGORY : ELSS Funds are best suited for Beginners and Salaried Class as this category of funds have multiple benefits of tax advantage and setting up the foundation for equity investments due to 3-year lock-in.