

Performance Analysis of Large Cap Category of Equity Mutual Funds

Dr. Pooja Mathur¹, Dr. Neha Gupta^{1*}, Dr. Satyendra P. Singh²

¹ Assistant Professor, Amity School of Business, Amity University, Sector- 125, Noida, UP, India

² Professor, Alliance School of Business, Alliance University, Bangalore, India

ABSTRACT

Mutual funds are amongst one of the most suitable investment alternatives for common investors. Mutual funds are professionally managed, transparent and affordable, and at the same time offer wide range of schemes. They have a potential to generate superior returns and at the same time, they reduce risk through diversification of portfolio. Out of various schemes of mutual funds, equity funds are quite popular among investors. Among equity funds, Large Cap is the prominent category for investors who want to benefit from equity investment by investing in a diversified portfolio of stocks of large cap companies. This study is an attempt to compare the performance of prominent large cap funds based on return generated by them and the risk associated with this return. Performance of ten prominent funds under large cap category had analyzed for this purpose over a period of five years. In addition, their performances are compared against two benchmark indices i.e. BSE 200 and Nifty 500. Researchers have also tried to find out whether there is any significant difference in the performance of these funds or not. The study reveals that these funds have generated good returns over the period and there is no significant difference between these funds as far as their returns are concerned.

Keywords: Mutual Funds, Large Cap Funds, Return, Risk, BSE 200, Nifty500

