

**A PROJECT REPORT**  
**A COMPARATIVE STUDY ON PERFORMANCE OF SELECTED**  
**MUTUAL FUND SCHEMES IN INDIA**

**Submitted By**

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**Submitted To**



**Visvesvaraya Technological University, Belagavi**

**In partial fulfilment of the requirements for the award of the degree of**  
**MASTER OF BUSINESS ADMINISTRATION**

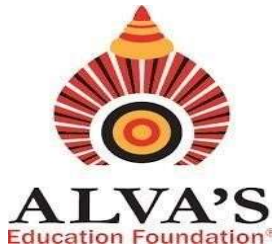
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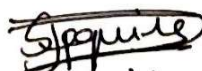
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## CERTIFICATE

This is to certify that **CHANDRIKA** bearing **USN 4AL21BA020** is a bonafide student of Master of Business Administration course of the Institute in 2021-23, affiliated to Visvesvaraya Technological University, Belgaum. Project report titled "**A COMPARATIVE STUDY ON PERFORMANCE OF SELECTED MUTUAL FUND SCHEMES IN INDIA.**" is prepared by her under the guidance of **Dr. Vishnu Prasanna K N, Professor**, PG Department of Business Administration in partial fulfillment of the requirements for the award of the degree of Master of Business Administration of Visvesvaraya Technological University, Belgaum Karnataka.



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## **DECLARATION**

I CHANDRIKA, hereby declare that the project report entitled “**A comparative study on performance of selected mutual fund schemes in India**” prepared by me under the guidance of Dr Vishnu Prasanna K N, Professor, PG Department of Business Administration, Alva's Institute of Engineering and Technology.

I also declare that this project work is towards the partial fulfilment of the university regulations for the award of the degree of Master of Business Administration by Visvesvaraya Technological University, Belgaum.

I have undergone a summer project for a period of six weeks. I further declare that this project is based on the original study undertaken by me and has not been submitted for the award of any degree/ diploma from any other University/ Institution.

**Place:** Mijar

**Date:** 04-09-2023

  
**Signature of the student**

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## **EXECUTIVE SUMMARY**

Comparative study on performance of selected mutual fund schemes in India highlights the importance of considering various factors, including risk-adjusted returns, volatility and consistency, when making investment decisions. While past performance can provide insights, it should not be the sole criterion for selecting mutual fund schemes. Investors are advised to assess their risk tolerance, investment goals and consult with financial advisors before making investment decisions. Additionally, it is crucial to review the performance of mutual fund schemes periodically to ensure alignment with changing market dynamics and individual investment objectives.

By using the monthly closing price of 10 Flexi Cap mutual fund schemes is used to calculate the risk and return of a sample group of companies from the listed industry. From January 2019 to December 2022, according to nifty index. Different statistical tools are used to achieve the goal, including descriptive statistics, correlation and beta also using Sharpe's, Treynor, Jensen and Fama Measure. To verify the accuracy of the hypothesis, a t-test is also done. Among the schemes listed, HDFC Equity Fund Growth appears to have the highest risk level in each of the four years listed. In contrast, Kotak Equity Fund and SBI Equity Fund appear to have the lowest risk levels in each of the four years listed.

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