

**A PROJECT REPORT ON**  
**A STUDY ON PERFORMANCE ANALYSIS OF SELECTED EQUITY**  
**SMALL-CAP MUTUAL FUND SCHEMES WITH SPECIAL**  
**REFERENCE TO BAJAJ CAPITAL LTD, MANGALORE**

**Submitted By**

**SURAKSHA**

**(4AL21BA095)**

**Submitted To**



**VISVESVARAYA TECHNOLOGICAL UNIVERSITY, BELAGAVI**

**In partial fulfilment of the requirements for the award of the degree of**

**MASTER OF BUSINESS ADMINISTRATION**

**Under the guidance of**

**Internal Guide**

**Mrs. Harshitha V Shetty**

Assistant Professor

PG Department of Business

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Alva's Institute of Engineering and  
Technology, Mijar, Moodbidri

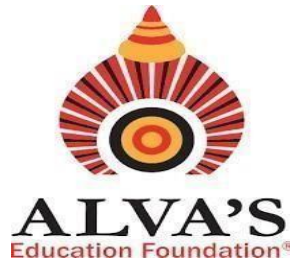
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MAY-2023



Bajaj Capital Limited  
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Mangalore, Karnataka 575003

Date : 27/05/2023

This is to certify that Ms. Suraksha.(USN:4AL21BA095), 2nd year M.B.A(IV Semester) student of Alvas Institute Of Engineering & Technology, Mijar, Moodbidri has done her "Project Work" on "A Study on Performance Analysis of Selected Equity Small-Cap Mutual Fund Schemes with special reference to Bajaj Capital Ltd, Mangalore" in our organisation under the guidance of Mr. Jayaraj.K, from 21st April 2023 to 27th May 2023.

During her tenure we found her performance was excellent and she was found hard working and diligent. We wish her all the best for her future endeavors.

For Bajaj capital ltd,

[JAYARAJ.K]



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(A Unit of Alva's Education Foundation @ Moodbidri)

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Accredited by NAAC with A+ Grade and NBA (CSE & ECE)

Date: 01-09-2023

## CERTIFICATE

This is to certify that SURAKSHA bearing USN 4AL21BA095 is a bonafide student of Master of Business Administration course of the Institute in 2021-23, affiliated to Visvesvaraya Technological University, Belgaum. Project report on "A STUDY ON PERFORMANCE ANALYSIS OF SELECTED EQUITY SMALL-CAP MUTUAL FUND SCHEMES WITH SPECIAL REFERENCE TO BAJAJ CAPITAL LTD., MANGALORE" is prepared by her under the guidance of Mrs. Harshitha V Shetty, Assistant 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.

Signature of Internal Guide

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#### DECLARATION

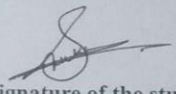
I, SURAKSHA, hereby declare that the Project report entitled "**A Study on the Performance Analysis of Selected Equity Small-Cap Mutual Fund Schemes with special reference to BAJAJ CAPITAL LTD., MANGALORE**" prepared by me under the guidance of Mrs. Harshitha V Shetty, Assistant Professor PG Department of Business Administration, Alva's Institute of Engineering and Technology and External assistance by Mr. Jayaraj. K, Branch Manager, Bajaj Capital Ltd, Mangalore.

I also declare that this Project work is towards the partial fulfillment of the university regulations for the award of 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 university / Institution.

Place: Mijar

Date: 1-09-2023

  
Signature of the student

## ACKNOWLEDGEMENT

I would like to take this opportunity to express my sincere gratitude to all those who have helped me throughout this project. It gives me immense pleasure to acknowledge all those who have rendered encouragement and support for the successful completion of this work.

I express my deep sense of gratitude to my internal guide **Mrs. Harshitha V Shetty**, Assistant Professor PG Department of Business Administration, for his constant support and encouragement to carry out my project successfully without much difficulty.

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## **EXECUTIVE SUMMARY**

The project is undertaken at Bajaj Capital Ltd, Mangalore. It is a Financial advisory Company and it operates as an investment management company and they offer wealth management, tax savings, mutual funds, bonds, fixed deposits, pension schemes.

There are lot of opportunities are there for today's investors but investors do not have the idea where to invest, As Warren Buffet said do not put all eggs in single basket, investors should not invest their entire money in single schemes, that must be diversified in order to minimize the risk of loss. If the investors want to invest his money and he does not have much knowledge where to invest, mutual fund is appropriate investment avenue for him. The main aim of the study is to know which schemes gives best result from the selected equity small-cap mutual funds for the period of five years.

Over the course of five years, the research aims to measure the performance of a chosen equity small-cap mutual funds. Annual returns of top 20 equity small-cap fund schemes over the course of five years are reviewed, and the best ten are picked based on total performance. Plan selection should be based on the goals of the investor. Overall, mutual funds are an excellent long-term investing choice. Research methodology, data sources, data analysis, and actual return results are discussed in great length here.

The results of the study reveal intriguing insights into the potential of these small-cap mutual fund schemes to generate wealth for investors. The executive summary encapsulates the pivotal outcomes of this study, enabling investors to make informed decisions regarding their investment strategies in the small-cap equity schemes.