

**“A RESEARCH STUDY ON PORTFOLIO FOR MUTUAL FUND  
INVESTORS  
STUDY CONDUCTED AT KOTAK SECURITIES, KUNDAPURA”**

**Submitted by**

**ANVESH M SHETTY**

**4LV17MBA03**

**Submitted to**



**Visvesvaraya technological university, Belgaum**

**In partial fulfillment of the requirements for the award of the degree of  
Master of business administration**

**Under the guidelines of**

**Internal guide**

**Prof. Nagendra S**

**Department of MBA**

**AIET, Mijar**

**External guide**

**Mr. Gajanana Rao K**

**Manager, Tradejini**

**Finance Private Ltd.**

**Department Of MBA**

**Alvas Institute of Engineering and Technology**

**Mijar**

**2017-2019**



Date: 17/02/2019

Place: Kundapura

**CERTIFICATE**

This is to certify that **Mr. Avesh M**, student of Master of business and administration (MBA) of Alva's institution of engineering and technology, Moodbidre, has successfully completed a summer internship in the field of finance "A research study on a portfolio for mutual fund investors" from 3rd January 2019 to 16th Feb 2019 under the guidance of **Mr. Gajanana Rao K (Sub broker)**

During the period of his internship program with us he had been exposed to different process was found punctual, hardworking and inquisitive.

**Guide Name: Gajanana Rao K (Sub broker)**

We wish his every success in his life and career.

Yours faithfully,

  
17/2/19  
Gajanana Rao K  
(Sub broker)

A circular stamp with 'KOTAK' at the top, 'KUNDAPURA' in the middle, and 'SECURITIES LTD.' at the bottom. The word 'FRANCHISEE' is written across the middle.

Kotak Securities Private Limited ,  
393-26 Bhandarkap College,  
Kundapur, Karnataka-576201  
Reg No-1NB230808130, Tel: 08038385383  
Regd. Office: 2nd Flr,Bldg. 535, Khar West,  
Nav Meghdoot, 536, Linking Rd,  
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Date: 12<sup>th</sup> April 2019


### Certificate

This is to certify that **Mr. ANVESH M SHETTY** bearing **USN 4LV17MBA03** is a bonafide student of Master of Business Administration program (2017-19) of the Institute affiliated to Visvesvaraya Technological University, Belagavi.

The project report entitled "**A RESEARCH STUDY ON PORTFOLIO FOR MUTUAL FUND INVESTORS OF KOTAK SECURITIES, KUNDAPURA**" is prepared by him under the guidance of **Dr. Nagendra S**, Associate Professor, 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, Belagavi, Karnataka.

  
**Dr. Nagendra S**  
Internal Guide

  
**Dr. R. Wranton Perez**  
HOD, MBA

  
**Dr. Peter Fernandes**  
Principal  
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## **EXECUTIVE SUMMARY**

### **Title of the Project**

#### **“Research Study on Portfolio for mutual Fund Investor”**

The study was conducted with the following objects.

1. To study the array of investment products available in the market
2. To ascertain the investment goals of investors.
3. To, device a standardize portfolio for the investors
4. To know where they prefer to invest or keep with them.
5. To find out reasons for the growth. Decline in NAV of mutual fund.

Research Design consists of collection & analysis of data's to execute a particularly theoretical perspective.

The information was collected through personal interview and interview was conducted through the mode of questionnaire.

The data was collected through primary as well as secondary sources.

The study was conducted in Kundapura city, with the help of database of portfolio building for investors collected by myself.

while studying for the Kotak Securities it is not more difficult for me for the findings however now a days people are more educated and very well known about the investments while in research I come to know that Kundapura peoples are investing in Mutual Funds for the tax benefits and safe returns.

There were no age criteria for the Mutual Funds investments any one can be invest in the market but here it is financial planner duty to guide investors properly so that they can also increase the investors in the market also bring the Mutual Funds in the top listed.

According to the inflation pressures in the economy people are more interested in Mutual Funds instead of saving in fixed deposits. In the mutual funds peoples get 14% returns as well tax benefits and sage returns are getting's.