

**PROJECT REPORT ON**  
**"AN EMPIRICAL STUDY ON SELECTED MUTUAL FUNDS**  
**PREMIER INVESTMENTS (AUTHORISED FRANCHISEE OF**  
**MOTILAL OSWAL)"**

**Submitted by**

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**Submitted To**



**VISVESVARAYA TECHNOLOGICAL UNIVERSITY, BELGAUM**

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

*Under the guidance of*

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**External Guide**

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**Motilal Oswal**  
**Financial Services Ltd**



**PG DEPARTMENT OF BUSINESS ADMINISTRATION ALVA'S INSTITUTE OF**  
**ENGINEERING & TECHNOLOGY**

**Shobhavana Campus, Mijar, Moodbidri, Dakshina**

**Kannada, Karnataka – 574225 July 2020-21**



Udupi

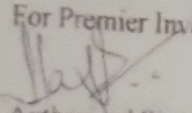
14.07.2021

CERTIFICATE

This is to certify that, Mr. Jayakumar Jain, Roll No. 4AL19MBA22, studying in Alvas Institute of Engineering and Technology, Moodabidri, Karnataka, has done "An Empirical Study On Selected Mutual Funds" at Premier Investments, Udupi, a franchisee of Motilal Oswal Financial Services Limited, Mumbai from 28th May 2021 to 14th July 2021.

During this period, his conduct and performance were good.

For Premier Investments,



Authorised Signatory





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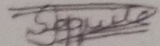
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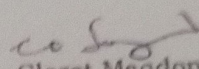
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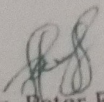
22 July 2021

### CERTIFICATE

This is to certify that **JAYAKUMAR JAIN** bearing USN **4AL19MBA22**, is a bonafide student of PG Department of Business Administration of Alva's Institute of Engineering and Technology, Mijar, affiliated to Visvesvaraya Technological University, Belagavi. The project report titled "**AN EMPIRICAL STUDY ON SELECTED MUTUAL FUND IN PREMIER INVESTMENTS (AUTHORIZED FRANCHISEE OF MOTILAL OSWAL)**" is prepared by him under the guidance of Mrs. Priya Sequeira, 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, Belagavi, Karnataka.

  
Mrs. Priya Sequeira  
Internal Guide

  
Dr. Claret Mendonca  
HOD

  
Dr. Peter Fernandes  
Principal

**PRINCIPAL**

**Alva's Institute of Engg. & Technology,  
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**DEAN**  
**Dept. of Business Administration**  
**Alva's Institute of Engg. & Technology**  
**MIJAR - 574 225**

Viva-Voce Examination

Date:

Signature of Internal Examiner  
Name & affiliation

Signature of External Examiner  
Name & affiliation



### DECLARATION

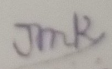
I, Jayakumar Jain, Reg.No. (4AL19MBA22), at this moment, declare that the project report entitled "AN EMPIRICAL STUDY ON SELECTED MUTUAL FUNDS" concerning "PREMIER INVESTMENTS(MOTILAL OSWAL LTD)" prepared by me under the guidance of Mrs. Priya Sequeira, Associate Professor, PG Department of Business Administration, Alva's Institute Engineering and Technology, Mijar, D.K.-574225, and external assistance by Mr. Harish B, Team Leader, Department of Online Marketing, PREMIER INVESTMENTS( MOTILAL (OSWAL LTD) UDUPI.

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

I have undergone a summer project for six weeks. I further declared that this project is based on the original study undertaken by me and has not been submitted to award any degree/diploma from any other university/institution.

Place: Mijar

Date: 23-07-2021

  
Signature of the student



### ACKNOWLEDGEMENT

I am happy to take this opportunity to thank all those who have supported me, directly and indirectly, for the completion of the project.

I am incredibly grateful to the management of " Premier investments(Motilal Oswal Ltd) Udupi" for giving me this opportunity to pursue my internship. This internship would not have been a successful one without the guidance of Mrs. Priya Sequeira, Associate Professor, P G Department of Business Administration, Alva's Institute of Engineering And Technology, Moodbidri. Her feedback and solutions have greatly helped me in this internship.

Thank you,

Jayakumar Jain



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## LISTS OF ABBREVIATIONS

|       |   |
|-------|---|
| UTI   | The unit trust of India                       |
| MOFSL | Motilal Oswal<br>Financial Service<br>limited |
| MOSL  | Motilal Oswal<br>securities limited           |
| AMC   | Assets management<br>company                  |



## EXECUTIVE SUMMARY

This project is about studying and analyzing the performance of a few selected schemes. Today an investor is interested in tracking the value of his investments, whether invested directly in the market or indirectly through mutual funds. This dynamic change has taken place because of several reasons. With globalization and the growing competition in the investments opportunity available, he would have to make guided and rational decisions on whether he gets an acceptable return on his investments in the funds selected by him or if he needs to switch to another fund.

The main objective of this study is to analyze the performance of the mutual fund schemes in terms of risk and return. The report deals with a comparative analysis of the selected balanced mutual fund schemes of different AMC's.

This project is undertaken to help the investors in analyzing the performance of their investments in mutual funds. It has been carried out to give performance analysis of joint fund, which provides a maximum possible return. According to the three different performance measures, the fund's risk and return are determined: Sharpe's Ratio, Tenor's ratio, and Jensen's Measure.

The methodology for carrying out the project was straightforward: through secondary data obtained from various mediums like the Internet, Fact sheets of the Funds, Business Magazines, etc., the analysis of mutual funds has been done concerning its multiple parameter.