

Sample Portfolio

50 % Debt – 50% Equity

Allocation	Funds
25%	DEBT FUND – ICICI pru PSU and Bank debt fund growth
25%	DEBT FUND – HDFC Gilt fund – growth plan
12.50%	EQUITY – Axis small cap reg
12.50%	EQUITY – MOSL Mid cap
12.50%	EQUITY – ICICI large & mid cap
12.50%	EQUITY – ICICI Value discovery

Year	Portfolio	Nifty 50
2015	5.70%	-4.60%
2016	13.49%	3.01%
2017	13.36%	26.65%
2018	-0.73%	3.15%
2019	10.89%	12.02%
2020	14.18%	14.90%
2021	28.45%	24.12%
2022	7.93%	4.33%
2023	18.37%	20.03%
2024	23.37%	13.97%
CAGR	13.50%	11%



**NORTHPOLE
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