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23 mutual fund schemes tripled investors' money in five years

BY AVNEET KAUR, ET ONLINE | UPDATED: MAY 17, 2018, 11:24 AM IST

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Investors are always looking to multiply their wealth. That too, in the shortest period. Is it possible? Can equity mutual fund schemes help them multiply wealth in a period of, say, five years? Here is the scoop. In fact, 23 equity mutual fund schemes managed to tripled investors' wealth in a period of five years.

Our research focused on diversified equity funds, including largecap, midcap and **multicap schemes**. We did not include smallcap schemes as they typically manage the feat easily. They may even do it in a short period. We also excluded **ELSS** schemes and sectoral schemes because they cater to different needs. We looked at open-ended schemes, their regular plan with the growth option. Next, we took out the schemes' five-year absolute returns starting from May 2013.

We found that 17 out of 25 midcap schemes managed to triple the invested sum in five years. **Canara Robeco Emerging Equities Fund** topped the list with an absolute return of 290 per cent. In other words, if an investor had invested Rs 1 lakh in the scheme in May 2013, s/he would have amassed Rs 3,90,000 rupees at the end of April 2018.

Five multicap schemes and a largecap scheme also made it to the list. See table below for the schemes.



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Mutual fund schemes which tripled money in 5 years		
Scheme Name	Rs 1 lakh invested would have become	Absolute Return*(%)
Largecap Scheme		
Tata Equity P/E Fund	3,07,284	207.28
Midcap Schemes		
Canara Robeco Emerging Equities Fund	3,89,723	289.72
Mirae Asset Emerging Bluechip	3,85,454	285.45
L&T Midcap Fund	3,77,169	277.17
Edelweiss Mid Cap Fund	3,59,602	259.60
UTI Mid Cap Fund	3,56,884	256.88
Aditya Birla SL Small & Midcap Fund	3,52,095	252.10
Principal Emerging Bluechip Fund	3,46,030	246.03
HDFC Mid-Cap Opportunities Fund	3,41,562	241.56
Sundaram Mid Cap Fund	3,39,377	239.38
Kotak Emerging Equity	3,39,346	239.35
ICICI Pru Midcap Fund	3,34,274	234.27
SBI Magnum MidCap Fund	3,30,424	230.42
DSPBR Midcap Fund	3,27,995	227.99
Franklin India Prima Fund	3,22,639	222.64
Tata Mid Cap Growth Fund	3,18,150	218.15
Invesco India Midcap Fund	3,06,716	206.72
Kotak Midcap	3,05,244	205.24
Multicap Scheme		
Aditya Birla SL Pure Value Fund	3,74,913	274.91
Aditya Birla SL India Opportunities Fund	3,40,268	240.27
L&T India Value Fund	3,24,571	224.57
Reliance Focused Equity Fund	3,11,162	211.16
Invesco India Multicap Fund	3,09,298	209.30

* Returns calculated for a period from May 2013 to April 2018
Source: Ace MF

In the same time period, the benchmark index, S&P BSE **Sensex**, generated a 78 per cent return and BSE Midcap index gave 166 per cent return. The data clearly shows how a fund manager's expertise can add extra to the returns.

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