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These eight equity mutual fund schemes have been toppers since 2009

BY AVNEET KAUR, ET ONLINE | UPDATED: APR 04, 2018, 11.00 AM IST

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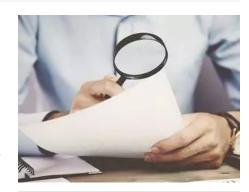
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Can equity mutual funds stay on top of the performance charts year after year? Well, if they do, it would make the lives of ordinary investors like us easy. Who wouldn't like a scheme or two that would top the charts year after year, right? Think of it: all you have to do is to choose a scheme that has been consistently topping the charts every year and start investing in it to create wealth over a long period. No worries about keeping track of the scheme, review its performance at least once a year, compare the performance with its benchmark and category....

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Well, here is the scoop. We have a list of eight schemes that managed the rare feat since 2009. These equity schemes have managed to stay on top of the charts based on their five-year CAGR returns.



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Here is how we found them: we took out equity- oriented mutual fund schemes -- including

largecap, midcap, multicap, and ELSS funds -- which have remained toppers in the five-year periods in a row. We used 5-year CAGR returns to take out the top schemes.

After applying certain filters (for details, read: How we did it?), we got eight schemes which have been among the top 10 schemes on the basis of their 5-year CAGR returns, starting from April 2009. See table below for the topper schemes.

Scheme Name	Category	AUM (Rs crore)	CAGR Returns (%)		
			3-Yr	5-Yr	10-Yr
Tata Equity P/E Fund	Largecap	2,799	14.22	23.86	15.21
Franklin India Smaller Cos Fund	Midcap	7,128	15.54	29.82	18.60
Canara Rob Emerg Equities Fund-Reg	Midcap	3,235	15.56	29.71	18.29
UTI Mid Cap Fund	Midcap	4,167	10.99	27.75	17.39
SBI Magnum MidCap Fund-Reg	Midcap	3,933	11.32	26.26	12.73
Franklin India High Growth Cos Fund	Multicap	7,639	7.59	21.81	14.50
Reliance Tax Saver (ELSS) Fund	ELSS	10,345	6.55	21.96	15.49
DSPBR Tax Saver Fund-Reg	ELSS	3,905	11.43	20.37	13.56
Data as on April 02, 2018					
Source: Ace Mutual Fund					

How we did it?

We extracted data for diversified equity funds, including largecap, midcap, multicap and ELSS category. We only considered openended schemes with growth option for the study. Next, we extracted 5-year CAGR returns from April 1 to March 31 for five consecutive periods. This way, we had CAGR returns for periods: Apr 01 2009 to Mar 31 2014, Apr 01 2010 to Mar 2015, Apr 01 2011 to Mar 2016, Apr 01 2012 to Mar 2017, Apr 01, 2013 to Mar 2018.

We specifically used 5-year CAGR returns as equities are recommended for longer time period of five years and more. Next, we filtered top 10 schemes on the basis of 5-year CAGR return in all the periods mentioned above. Those schemes which were a part of the top 10 schemes in all the mentioned periods were taken out. We performed the same steps to take out the toppers in all categories separately.



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One limitation to this study is that we might have missed some good schemes which have been consistent performers for all the years since their inception, but have not completed the required number of years to get past our research filter.

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