

02:12 PM | 04 APR **LIVE** **MARKET STATS** **SENSEX** 33,082 ▼ -288.21 **NIFTY 50** 10,147 ▼ -97.30 **सोने (एमसीएक्स) (₹/१० ...)** 30,868.00 ▲ 234.00 **यू एस डी/भारतीय...** 65.07 ▲ 0.06 **पोर्टफोलियो निर्माण करा** **ई-टी मार्केट्स आप उतरवून घ्या** **CHOOSE LANGUAGE** MAR **LIVE TV**

These eight equity mutual fund schemes have been toppers since 2009

BY [AVNEET KAUR](#), ET ONLINE | UPDATED: APR 04, 2018, 11:00 AM IST

Post a Comment

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....



Big Change:
The end of Five-Year Plans: All you need to know

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.

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 open-ended 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.



Augment human capability for better decision making using AI
E&Y



Formula for getting good Rank in School and Olympiad exams.
OlympiadHelper.com

Recommended By Colombia

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.

Stay on top of business news with The Economic Times App. [Download it Now!](#)

THE ECONOMIC TIMES

Powered by **TIMESINTERNET**

Live Market
News
Portfolio
Mobile
Live TV
Biz Listings

Industry
Newsletters
Commodities
Speed
Blogs
RSS

About Us
Create Your Own Ad
Advertise with Us
Terms of Use & Grievance Redressal
Privacy policy

FOLLOW US



Download it from
APP STORE



Download it from
GOOGLE PLAY



Download it from
Windows Store

Other Times Group news sites

[इकनॉमिक टाइम्स](#) | [ईओबीआई](#) | [Pune Mirror](#) | [Bangalore Mirror](#) | [Ahmedabad Mirror](#) | [ItsMyAscent](#) | [Education Times](#) | [Brand Capital](#) | [Mumbai Mirror](#) | [Times Now](#) | [Indiatimes](#) | [नवभारत टाइम्स](#) | [महाराष्ट्र टाइम्स](#) | [ಶಿವಮೊಗ್ಗ ಕರ್ನಾಟಕ](#) | [Go Green](#) | [AdAge-India](#) | [Eisamay](#) | [IGN India](#) | [NavGujarat Samay](#) | [Times of India](#) | [Samayam Tamil](#) | [Samayam Telugu](#) | [Miss Kyra](#) | [Bombay Times](#) | [Filmipop](#) | [BrainBaazi](#) | [BrainBaazi-APP](#)

Living and Entertainment

[Timescity](#) | [iDiva](#) | [Entertainment](#) | [Zoom](#) | [Healthmeup](#) | [Luxpresso](#) | [Gadget Reviews](#) | [Titanium & Platinum Credit Card](#) | [Online Songs](#) | [MensXP](#) | [Hotels](#) | [Travel Destinations](#) | [Griebuzz](#) | [Recipes](#) | [Gaana](#) | [Happytrips](#) | [Getsmartapp](#)

Interest Network

[itimes](#)

Hot on the Web

[Share Market](#) | [GST](#) | [Income Tax Slabs](#) | [Aadhaar Card](#) | [How to Save Income Tax](#) | [Mutual Funds](#) | [Tax Saving Guide](#) | [Sensex Today](#) | [Nifty Bank](#) | [Sensex](#) | [Income Tax Calculator](#) | [Karnataka Election 2018](#)

Services

[Book-print-ads](#) | [Online-shopping](#) | [Matrimonial](#) | [Astrology](#) | [Jobs](#) | [Tech-Community](#) | [Property](#) | [Buy car](#) | [Bikes in India](#) | [Free-Classifieds](#) | [Send money to India](#) | [Used Cars](#) | [Restaurants in Delhi](#) | [Remit to India](#) | [Buy Mobiles](#) | [Listen Songs](#) | [News](#) | [TimesMobile](#) | [Real Estate Developers](#) | [Restaurant Deals in Delhi](#) | [Car Insurance](#) | [Gadgets Now](#) | [Free Business Listings](#) | [CouponDunia](#) | [Remit2India](#) | [Techradar](#) | [AliveAR](#) | [Getsmartapp-App](#) | [ETMoney-Finance-App](#) | [Feedback](#) | [Auto](#)

In Case You Missed It

- ✦ [Aditya Birla Sun Life Mutual Funds](#)
- ✦ [L&T Mutual Funds](#)
- ✦ [Mutual Fund](#)
- ✦ [Kotak Mahindra Mutual Funds](#)
- ✦ [Reliance Mutual Fund](#)
- ✦ [HDFC Mutual Fund](#)
- ✦ [Franklin Mutual Funds](#)
- ✦ [IDFC Mutual Funds](#)
- ✦ [IPO](#)
- ✦ [Best Mutual Funds](#)
- ✦ [UTI Mutual Fund](#)
- ✦ [ICICI Mutual Fund](#)

Copyright © 2018 Bennett, Coleman & Co. Ltd. All rights reserved. For reprint rights: [Times Syndication Service](#)