



Weekly Wealth Report

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Should you Invest in Thematic Funds?



Sectoral & Thematic funds inflow are at the highest and witnessing exceptional inflow in 2024, in contrast to the other categories.

In terms of Assets Under Management (AUM) as well, the largest sub-category with the AUM stood at Rs 70,000 crore in 2024, contributing nearly 39% flows into the actively managed equity mutual fund category.

If you look closer, most of the investors in this category are beginners and they are purchasing these sectoral funds by assuming these funds will deliver same stellar returns which they have produced last Calander year.

Beginners what they don't understand is Investing in thematic funds does not offer enough diversification to counter broad-based price movements.

Also thematic funds has huge Market Timing risks. Predicting the success of the trends focused on by thematic funds can be difficult, and if your (or professional management's) timing is off, you could face significant losses.

Weekly Market Pulse

Domestic equity markets fell after posting gains for four straight weeks as key benchmark indices BSE Sensex and Nifty 50 fell 4.98% and 4.77%, respectively. The fall was broad-based as the mid-cap segment and the small-cap segment both closed the week in red.

Domestic equity markets fell during the week as the U.S. Federal Reserve's hawkish tone on interest rate cuts in 2025 dampened the market sentiment.

After slashing interest rates by 25 bps at Dec 2024 monetary policy meeting as widely expected, the U.S. Federal Reserve warned that it remains cautious about further rate cuts amid inflation concerns, as the central bank cautioned that inflation may take one to two years to return to the 2% target.

Losses widened due to the weakening rupee and heavy selling by foreign institutional investors.

On the BSE sectoral front, BSE Metal plunged 6.67% as steel stocks faced selling pressure after the Karnataka government tabled a bill to tax mines and mining land. The Bill proposes to levy a tax from Rs. 20 to Rs. 100 per tonne for different minerals.

Indian Equity Market Performance

Broad Indices	20-Dec-24	% Change (WoW)	% Change (YoY)	% Change (YTD)
BSE Sensex	78,042	-4.98	10.69	8.03
Nifty 50	23,588	-4.77	11.52	8.54
BSE 100	25,007	-4.82	15.06	11.71
Nifty 500	22,319	-4.45	18.85	14.88
Nifty Midcap 100	56,907	-3.53	29.26	23.22
Nifty Small cap 100	18,714	-3.57	29.89	23.58

Mutual Fund Corner

Invesco Large & Mid Cap Fund

Invesco India Large & Mid Cap Fund

(Large & Mid Cap Fund - An open ended equity scheme investing in both large cap and mid cap stocks)

Invesco Large & Mid Cap Fund - An open ended equity scheme investing in both large cap and mid cap stocks

Fund Managers: Aditya Khemani & Amit Ganatra

Investment Strategy and Portfolio Construction Guidelines

- Invests in a combination of both growth and value stocks
- Bottom up and top-down approach to select stocks
- No cash calls - fully invested approach (Target 95%)¹
- No. of holdings - 50-70 Stocks
- Capital appreciation over long-term
- Investments predominantly in equity and equity-related instruments of large and midcap companies

To invest in SIP & in Mutual Funds Click the link and start your investments instantly (You can also call us @ 7810079946)

<http://www.assetplus.in/partner/sathishkumar>

Stock of the Week

Garden Reach Ship Builders

CMP – 1548

Target – 1899 (In 12 – 18 Month's Time Frame)

Garden Reach Shipbuilders & Engineers Ltd is a premier shipbuilding company in India under the administrative control of the Ministry of Defence, primarily catering to the shipbuilding requirements of the Indian Navy and the Indian Coast Guard. GRSE is a diversified, profit making and the first Shipyard in the country to export warships and delivered 100 warships to the Indian Navy and Indian Coast Guard.

Nil debt company

Healthy long term growth as Operating profit has grown by an annual rate 64.42%

The company has declared Positive results for the last 6 consecutive quarters

PAT(9M) At Rs 296.56 cr has Grown at 39.41 %

NET SALES(Q) Highest at Rs 1,152.92 cr

Multiple factors for the stock are Bullish like MACD, Bollinger Band, KST, DOW and OBV

For your Equity recommendation – open a De Mat account with Angel Broking with this link

<https://app.aliceblueonline.com/openAccount.aspx?C=SSP03>

[This week Media Publications](#)

My Youtube Family is now with 1 Lakh Subscribers, 689 Videos, 54 Lakh Views and Counting.

It is a dream to make investing Simpler, Profitable and Accessible to everyone!

https://www.youtube.com/@Sathish_Speaks_ (Channel Link)



[Where is your First 1 Crore?](#)



<https://www.youtube.com/watch?v=uHToYgNqVHE>

10 Mistakes to avoid in your 30's and 40's



<https://www.youtube.com/watch?v=6DHtninaxoY>

How to create a balanced Portfolio for 2025



https://www.youtube.com/watch?v=dj_ZuQDQnbU

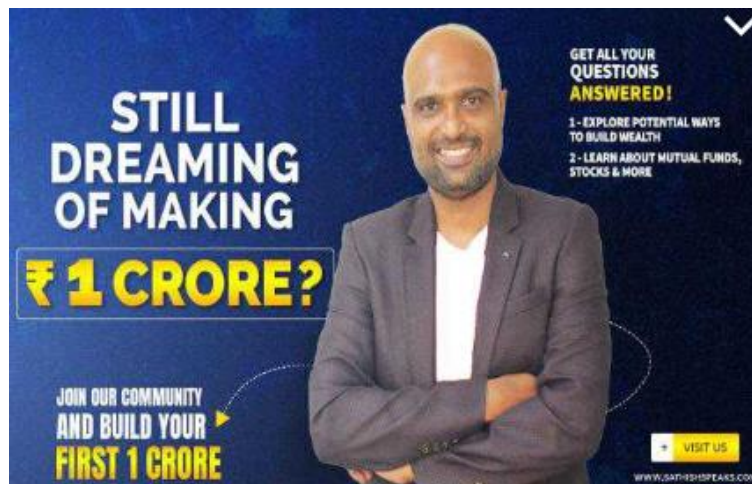
8 Common Mistake to avoid in Mutual Funds



<https://www.youtube.com/watch?v=16vx-fVgAYY>

My First 1 Crore Club

Are you still dreaming to achieve a net worth of ₹1 crore?



Still dreaming how to make 1crore?

Still Wondering how a salaried person/professionals can make 1cr?

To all the questions in your mind here is the potential ways to build it through Mutual Funds, Stocks and Much More...

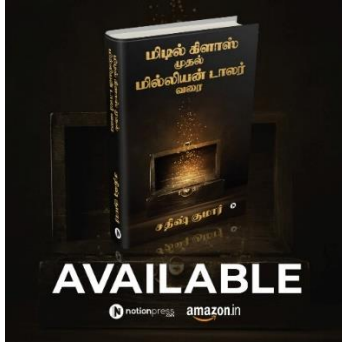
Why do you have to join this Community?

- Having money but still doesn't know how & where to invest?
- Selecting wrong Stocks?
- Selecting wrong mutual funds?
- Invested in all possible ways still money haven't doubled?

To all these there is one solution Join our First 1cr Club Webinar by paying just 499/- by clicking the below link

[My First 1Cr Club](#)

Middle Class to Million Dollar Book



Man and his struggle to generate and preserve wealth is eternal. One thing which is common among everyone in this society, that everyone has financial dream and aspiration to become Crorepati.

Middle Class to Million Dollar is a guide to understand how simple and common sense in Personal Finance can help you to get wealthy Corpus.

Click here to purchase the book from Amazon

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To Buy my Untold Wealth Secret Book from Flipkart



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Visit – www.sathishspeaks.com for More Details.

Disclaimer

Mutual Funds and Stock Market Investments are subject to market risks, pls read all scheme related documents carefully. Past performance of the mutual fund is not necessarily indicative for future performances. Mutual fund does not guarantee any returns or dividends.

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