Mutual Fund Distributor

Navigating Market Storms : The All Weather Investing Portfolio

In a landscape of persistently high inflation and diminishing returns from traditional investment avenues, investors seek refuge in instruments capable of outpacing inflation and delivering real returns. However, the volatile nature of equity markets and the limitations of physical assets like gold and real estate present challenges.



Introduction to All-Weather Investing Portfolio :



Introducing the All-Weather Investing Portfolio—a strategic blend designed to weather market turbulence while delivering steady long-term returns. With a focus on stability and growth, this portfolio offers a balanced approach to wealth accumulation.

Portfolio Details

Investment size - ₹ 10,00,000
Investment tenure - 5 Years and above.
Asset Allocation & Return Assumption

Asset Type	Allocation	Return Assumption
Equity (Large & Midcap Category Fund)	55%	13%
Debt (Dynamic Bond Fund)	20%	6%
Gold (Gold FOF)	25%	8%
Total Portfolio	100%	10.35%

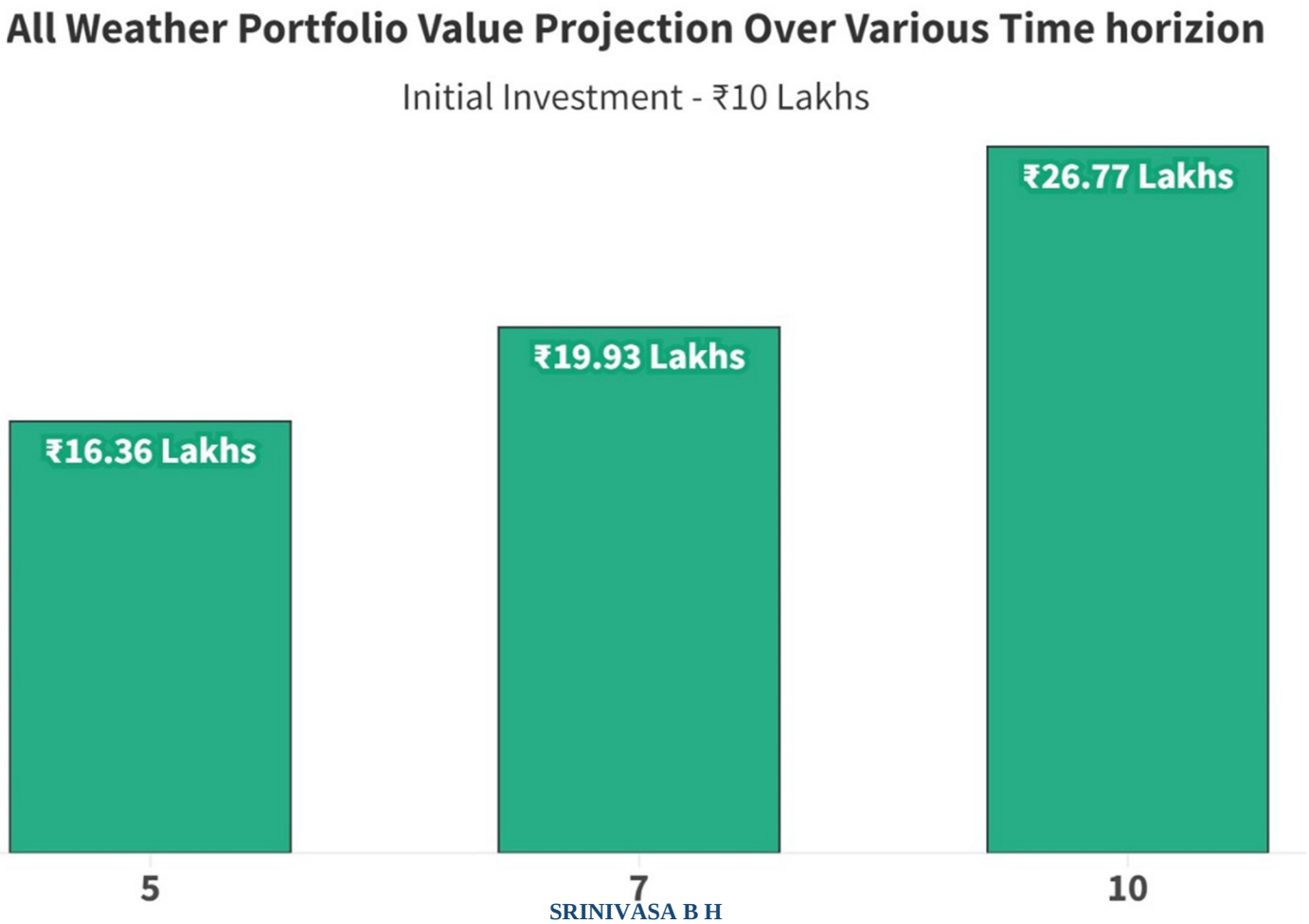
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With an allocation of 55% to equity (large & midcap), 20% to debt (dynamic bond), and 25% to gold (Gold FoF), the All-Weather Investing Portfolio strikes a harmonious balance between various asset classes while focusing on long term growth. This allocation is optimized to mitigate short-term market fluctuations while maximizing long-term growth potential. Based on historical data and market analysis, the All-Weather Investing Portfolio is projected to deliver an annual return of 10.35%.

Future Projection:

Over a 5-year or more investment horizon, the portfolio is expected to grow substantially, offering investors a compelling opportunity for wealth creation.





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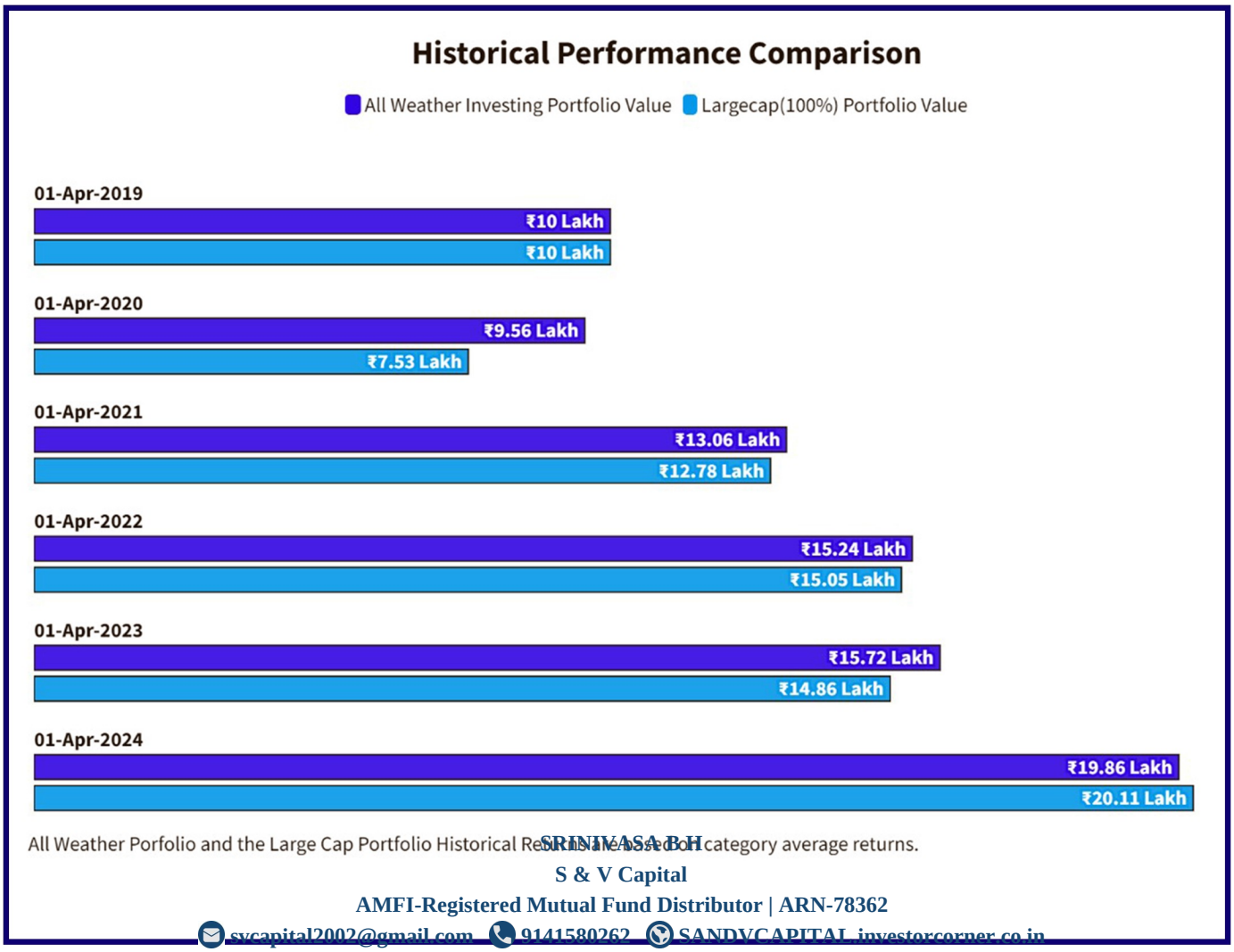
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Back Testing of the Strategy :

Backed by rigorous backtesting, the All-Weather Investing Portfolio has demonstrated resilience and consistency in various market conditions, even in the Covid Period. Historical performance data reaffirms its ability to deliver favorable returns while minimizing downside risk.

The below-mentioned chart shows back-testing examples of the strategy where simultaneously ₹ 10,00,000 is invested in two portfolios on a past date of 01-Apr-2019. One is in a weather portfolio and the other is a 100% Large Cap portfolio.





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Risk :



While the All-Weather Portfolio offers a robust investment strategy, it's essential to acknowledge that past performance is not indicative of future results. Market dynamics can change, and actual returns may vary from projections.

Conclusion :

In conclusion, the All-Weather Investing Portfolio presents a compelling solution for investors seeking stability in uncertain times and focusing on long-term growth. By embracing diversification and adopting a long-term perspective, investors can navigate market storms with confidence, knowing their investments are positioned for success. With a focus on minimizing short-term volatility and maximizing long-term returns, the All-Weather Investing Portfolio is poised to deliver on its promise of financial security and

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