Mutual Fund Distributor

5 BEST HYBRID MUTUAL FUND CATEGORIES WITH LESS VOLATILITY



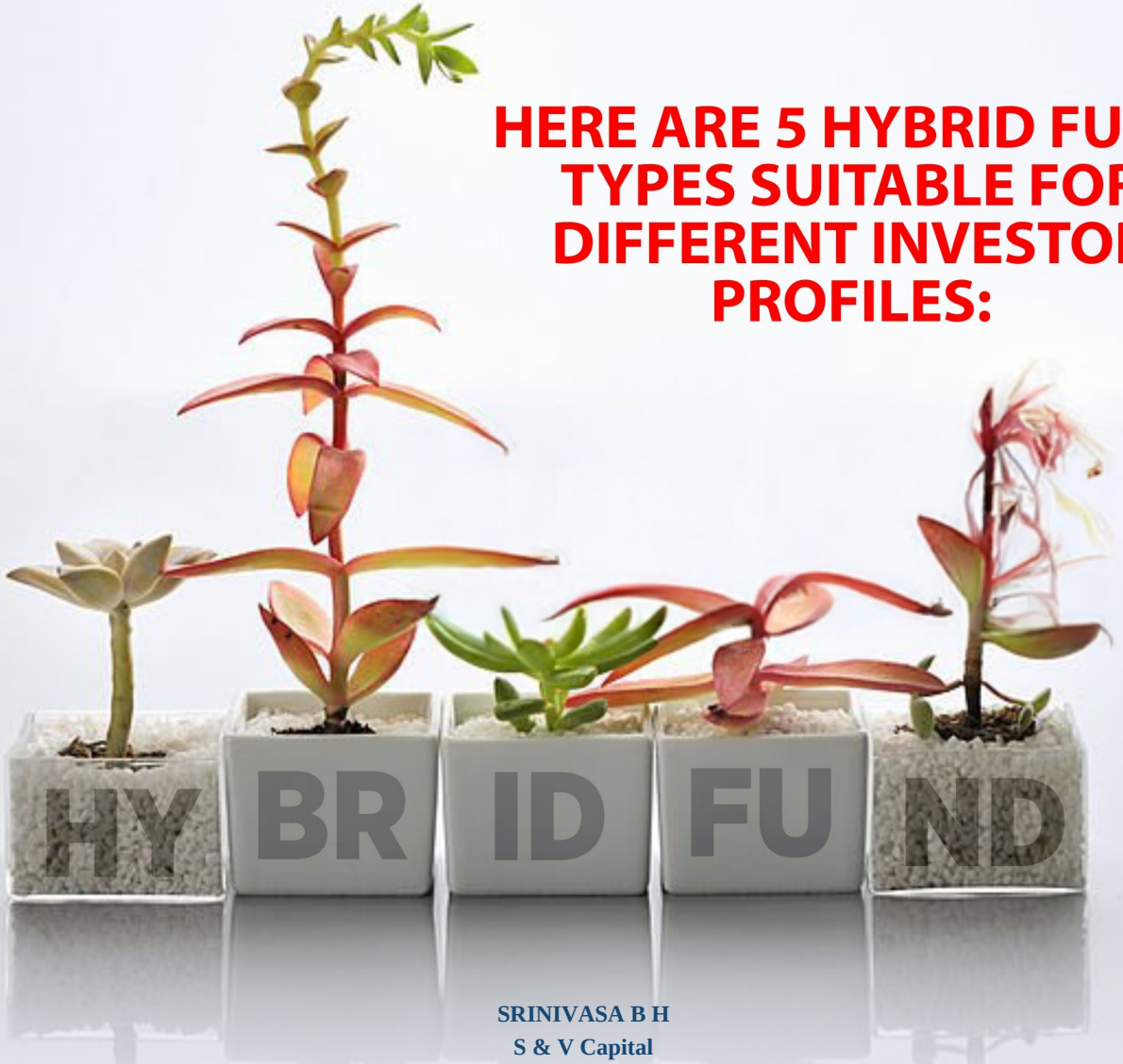
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S & V Capital
AMFI-Registered Mutual Fund Distributor | ARN-78362
svcapital2002@gmail.com 9141580262 SANDVCAPITAL.investorcorner.co.in

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Are you looking for mutual fund options that balance growth and stability?

Hybrid mutual funds invest in a mix of equity and debt, aiming to reduce risk while offering better returns than traditional savings.

HERE ARE 5 HYBRID FUND TYPES SUITABLE FOR DIFFERENT INVESTOR PROFILES:



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1 BALANCED ADVANTAGE FUND (BAF)

Q What it is?

Dynamic asset allocation funds switch between equity and debt based on market trends using in-house models or strategies.

Q Why it matters?

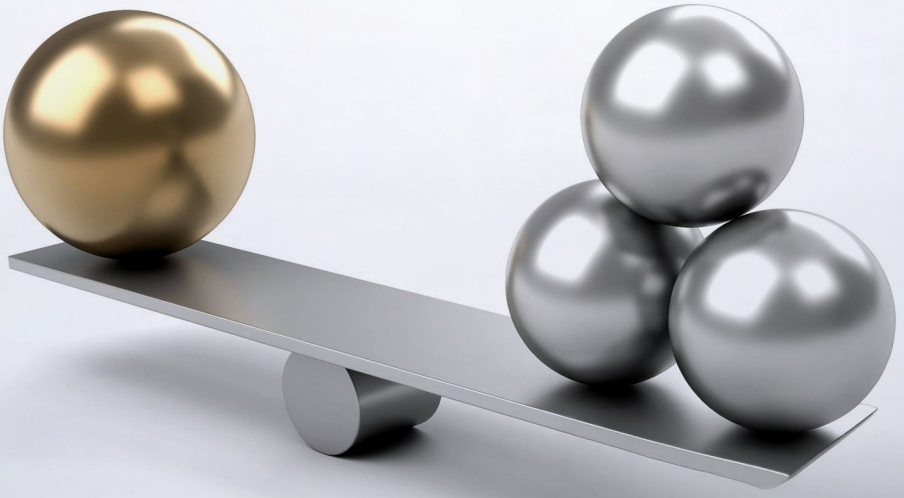
Helps reduce risk during volatile markets by automatically adjusting exposure.

Q Suitable for?

Investors who want equity exposure with automatic risk control

Track Record:

		Returns (%)					
Category	**Plan**	**3 Months**	**6 Months**	**1 Year**	**3 Years**	**5 Years**	**10 Years**
Hybrid - Balanced Advantage	Regular	5.81	2.84	9.11	14.08	15.79	10.01



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2 MULTI ASSET ALLOCATION FUND

Q What it is?
Invests in three or more asset classes such as equity, debt, and gold.

Q Why it matters?
Diversification across different types of investments helps balance performance across market cycles.

Q Suitable for?
Investors looking for diversification beyond equity and debt

Track Record:

		Returns (%)					
Category	**Plan**	**3 Months**	**6 Months**	**1 Year**	**3 Years**	**5 Years**	**10 Years**
Hybrid - Multi Asset Allocation	Regular	5.88	4.42	9.72	16.46	20.94	12.22



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3 CONSERVATIVE HYBRID FUND

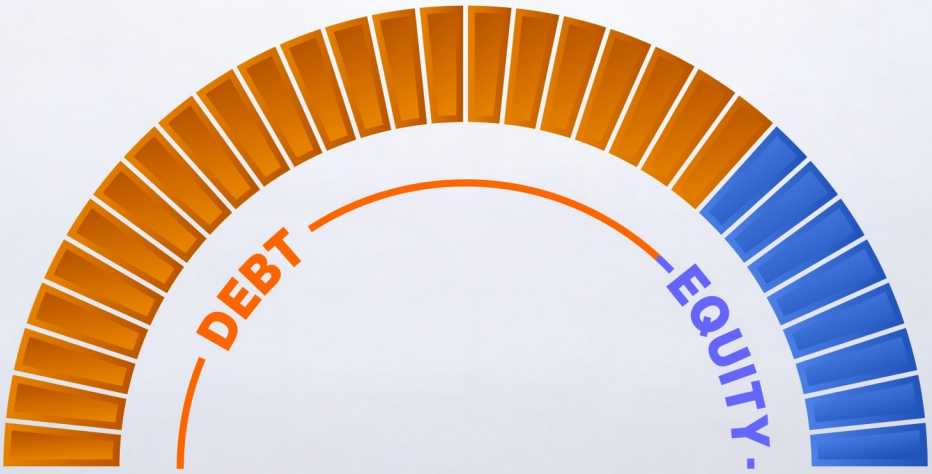
Q What it is?
A fund that invests 75–90% in debt instruments and the rest in equity.

Q Why it matters?
Lower volatility and steady returns

Q Suitable for?
Conservative investors or retirees looking for stability with some growth

Track Record:

		Returns (%)					
Category	**Plan**	**3 Months**	**6 Months**	**1 Year**	**3 Years**	**5 Years**	**10 Years**
Hybrid - Conservative Hybrid Fund	Regular	4.07	4.15	9.7	9.85	10.33	7.74



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4 EQUITY SAVINGS FUND

Q What it is?
Combines equity, arbitrage strategies, and debt in a balanced way.

Q Why it matters?
The arbitrage part helps reduce risk while maintaining equity taxation benefits.

Q Suitable for?
Investors seeking low-risk equity exposure with better taxation than pure debt

Track Record:

		Returns (%)					
Category	**Plan**	**3 Months**	**6 Months**	**1 Year**	**3 Years**	**5 Years**	**10 Years**
Hybrid - Equity Savings	Regular	4.01	3.31	8.81	10.74	12.21	8.12



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5 HYBRID FUND OF FUNDS (FoF)

Q What it is?
Invests in a mix of other mutual funds across asset classes

Q Why it matters?
Managed by experts to create a balanced portfolio

Q Suitable for?
Investors who prefer a ready-made, diversified solution managed by fund experts.

Track Record:

		Returns (%)					
Category	**Plan**	**3 Months**	**6 Months**	**1 Year**	**3 Years**	**5 Years**	**10 Years**
FoFs (Domestic) - Hybrid	Regular	4.01	2.46	10.8	12.84	15.75	9.94



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FINAL THOUGHT

If you're concerned about market volatility, hybrid funds are a great way to start your mutual fund journey. Choose the category that matches your risk profile and investment goal.



DISCLAIMER: Mutual Fund investments are subject to market risks. Please read all scheme-related documents carefully before investing. Although Hybrid Funds may be less volatile as compared to pure equity funds, they are not immune to the volatility of equity markets due to the presence of equity portion. Past performance is not indicative of future results and returns are not guaranteed. Mutual Fund category performance date - 16/05/2025

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