

03:59 PM 03 OCT CLOSED	सेन्सेक्स MARKET STATS ▼ 35,975 ▼ -550.51	निफ्टी 50 10,858 ▼ -150.05	सोने (एमसीएक्स) (₹/१० ...) 30,950.00 ▲ 358.00	यू एस डी/भारती... 73.32 ▲ 0.41	पोर्टफोलियो निर्माण करा	ई-टी मार्केट्स आप उत्तरवृत्त ध्या	CHOOSE LANGUAGE MAR
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NFO review: HSBC Equity Hybrid Fund

BY SHIVANI BAZAZ, ET ONLINE | OCT 01, 2018, 10:56 AM IST

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HSBC Mutual Fund has launched a new equity hybrid scheme called the **HSBC Equity Hybrid Fund** today. The open-ended hybrid scheme, an aggressive equity hybrid scheme, will invest predominantly in equity with a small exposure to fixed income instruments. The **new fund offer** is open for subscription till October 12.

According to the offer document shared by the company, the scheme will follow a flexicap investment strategy. Flexi cap strategy can invest across market spectrum depending on prevailing opportunities in the market. The fund will be jointly managed by Neelotpal Sahai (equity portion) and Sanjay Shah (debt portion).

"We believe that this fund is well positioned to offer an optimal asset allocation best suited for long-term investors. Being sector and market capitalization agnostic, it ensures that opportunities across sectors are leveraged for long term capital appreciation," says Ravi Menon, CEO, HSBC Global Asset Management Company India.



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The scheme information document highlights four key benefits of investing in this scheme:

- Optimal asset-allocation portfolio
- Flexi investment strategy
- High growth opportunities
- Lower risk



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Should you invest?

Mutual fund advisors typically ask investors to avoid NFOs unless the new scheme offers something unique which is not available in the market. "The scheme might do well in the long-term but right now we don't have any data to support this claim. With both the debt and equity markets battling with volatility, it becomes even more important for investors to choose schemes which have track record of sailing through such situations," says Vishal Dhawan, Founder, Plan Ahead Wealth Management. "I would suggest investors to go for an established scheme if they want to invest in an equity hybrid scheme at this point," adds Dhawan.

Scheme at a glance:

Benchmark: A customized index with 70% weight to S&P BSE 200 and 30% weight to CRISIL Composite Bond Fund Index.

Minimum Application Amount: Rs 5,000/- per application and in multiples of Re 1/- thereafter

Entry load: Nil

Exit load: Any redemption / switch-out within 1 year from the date of allotment: For 10% of the units: NIL. For remaining units: 1%, If redeemed / switched out after 12 months from the date of allotment: NIL.

Fund Managers: Neelotpal Sahai for Equity; Sanjay Shah for Debt

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