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MID CAP FUNDS

What are Mid-Cap Funds?

Mid-cap funds are equity mutual funds that invest primarily in mid-sized companies — typically those *ranked between 101 and 250* in terms of market capitalization as per SEBI classification. These companies lie between the large, well-established firms and the smaller, emerging ones.

Why Invest in Mid-Cap Funds?

1. Growth Potential:

Mid-cap companies are often in their expansion phase, with strong potential for revenue and profit growth. This gives them the ability to deliver higher returns compared to large-cap companies over the long term.

2. Diversification Benefits:

Adding mid-cap funds to a portfolio helps balance risk and return. They tend to perform well in growing markets, complementing the stability of large-cap holdings.

3. Emerging Leaders:

Many mid-cap firms are future large caps — investing early can help investors benefit from their growth journey.

4. Inflation-Beating Returns:

Over time, mid-cap funds have historically outperformed inflation and offered better post-tax returns than traditional investments.



Top 3 Midcap Funds:***1. Motilal Oswal Midcap Fund******Returns:***

Year	5 Year	7 Year	10 Year
Returns	31.55%	22.36%	17.12%
Nifty Midcap 150 TRI	27.47%	20.23%	18.21%

Top 5 Equity Holdings:

Issuer	% to NAV
Persistent Systems	9.47
Coforge	9.32
One 97 Communications	8.69
Dixon Technologies (India)	8.68
Eternal	8.47

Returns & Portfolio as on 31st October, 2025.***2. Invesco India Midcap Fund******Returns:***

Year	5 Year	7 Year	10 Year
Returns	28.32%	21.89%	18.30%
Nifty Midcap 150 TRI	27.47%	20.23%	18.21%



Top 5 Equity Holdings:

Issuer	% to NAV
AU Small Finance Bank	5.59
Swiggy	5.23
The Federal Bank	5.07
L&T Finance	4.89
Prestige Estates Projects	4.89

Returns & Portfolio as on 31st October, 2025.**3. HDFC Midcap Fund****Returns:**

Year	3 Year	5 Year	10 Year
Returns	25.15%	28.64%	17.76%
Nifty Midcap 150 TRI	27.47%	20.23%	18.21%

Top 5 Equity Holdings:

Issuer	% to NAV
Max Financial Services	4.46
AU Small Finance Bank	3.70
Indian Bank	3.54
The Federal Bank	3.38
Balkrishna Industries	3.37

Returns & Portfolio as on 31st October, 2025.

MFD Details:

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MFD

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Regards,

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* Mutual funds are subject to market risks. Please read all scheme-related documents carefully before investing. Past performance does not indicate future results. Investments are subject to market fluctuations, and there is no assurance of returns.

