



# CLIENT FIRST A S I A

YOUR TRUST, OUR ASSET

*Your trusted partner in Wealth Creation*



## JUNE 2021

# MONTHLY MAGAZINE



### **Mr. KUNJAN GUPTA**

**Founder and MD  
Client First Wealth Management Pvt Ltd**

Hello Friends,

Your continuous Support and Trust help us in delivering consistent performance.

Thank you for helping us in living our tagline “ Your Trust, Our Asset”.

Our financial performance is strong, and so is our organizational health. Client First Wealth Management Pvt. Ltd is a loyalty leader when customers are asked about their willingness to recommend us to their family and friends. Also we are pleased to inform you that our Fanatical Portfolio is beating returns of Nifty 50 behind. Our sincere and consistent efforts are always towards providing you good returns. Nevertheless, we must become even better in customer service excellence. Our focus on productivity can never be an excuse to compromise on customer experience as we are proving it during pandemic by providing them constant healthy and wealthy services.

Keep Investing, Keep Growing!!!

# FINANCIAL SNAPSHOT - INDEX



## TOP MONTHLY GAINERS - NSE

| TOP GAINERS NSE           | CURRENT PRICE | % CHANGE |
|---------------------------|---------------|----------|
| ECLERX SERVICES LTD..     | 2074          | 60.79%   |
| INDIAN OVERSEAS BANK      | 27.5          | 56.29%   |
| HFCL LTD.                 | 69.15         | 47.84%   |
| JK PAPER LTD.             | 216.9         | 41.30%   |
| JAMMU & KASHMIR BANK LTD. | 41.4          | 40.31%   |

## TOP MONTHLY LOSERS - NSE

| TOP LOSERS NSE          | CURRENT PRICE | % CHANGE |
|-------------------------|---------------|----------|
| ADANI TRANSMISSION LTD. | 956.2         | -35.41%  |
| AFFLE (INDIA) LTD.      | 4418.6        | -20.09%  |
| ADANI GREEN ENERGY LTD. | 1015.3        | -17.78%  |
| WOCKHARDT LTD.          | 536           | -16.53%  |
| VARROC ENGINEERING LTD. | 381           | -14.84%  |

## SEGMENT PERFORMANCE

| NIFTY INDEXES | MONTHLY CHANGE |
|---------------|----------------|
| PHARMA        | 2.8%           |
| IT            | 7.1%           |
| REALTY        | 2%             |
| FMCG          | 3.2%           |
| AUTO          | 0.5%           |

## OTHER ASSETS

| ASSETS      | MONTHLY CHANGE |
|-------------|----------------|
| USD /INR    | 2.55%          |
| GOLD        | -4.06%         |
| SILVER      | -3.93%         |
| CRUDE OIL   | 12.97%         |
| NATURAL GAS | 22.72%         |



# FINANCIAL SNAPSHOT - TOP PERFORMING MUTUAL FUND



## MUTUAL FUND (LARGE CAP)

| LARGE CAP FUND  | JUNE 21 |
|---|---------|
| MIRAE ASSET LARGE CAP FUND - REGULAR - GROWTHLARGE CAP FUND | 3.09%   |
| KOTAK BLUECHIP FUND - GROWTHLARGE CAP FUND                  | 3%      |
| NAVI LARGE CAP EQUITY FUND - GROWTHLARGE CAP FUND           | 3%      |
| UTI MASTERSHARE UNIT SCHEME - GROWTHLARGE CAP FUND          | 2.78%   |
| IDBI INDIA TOP 100 EQUITY FUND - GROWTHLARGE CAP FUND       | 2.57%%  |

## MUTUAL FUND (MID CAP)

| MID CAP FUND   | JUNE 21 |
|--|---------|
| UNION MIDCAP FUND - REGULAR PLAN - GROWTHMID CAP FUND      | 9.01%   |
| BARODA MID-CAP FUND - PLAN A - GROWTHMID CAP FUND          | 7.87%   |
| ITI MID CAP FUND - REGULAR PLAN - GROWTHMID CAP FUND       | 7.13%   |
| EDELWEISS MID CAP FUND - REGULAR PLAN - GROWTHMID CAP FUND | 6.89%   |
| BNP PARIBAS MID CAP FUND - GROWTHMID CAP FUND              | 6.88%   |

## MUTUAL FUND (MULTI CAP)

| MULTICAP FUND  | JUNE 21 |
|--|---------|
| EDELWEISS RECENTLY LISTED IPO FUND - GROWTHMULTI CAP FUND                  | 6.6%    |
| KOTAK INDIA GROWTH FUND - SERIES IV - GROWTHMULTI CAP FUND                 | 5.78%   |
| PPRINCIPAL MULTI CAP GROWTH FUND - GROWTHMULTI CAP FUND                    | 5.14%   |
| MAHINDRA MANULIFE MULTI CAP BADHAT YOJANA - REGULAR PLAN - GROWTHMULTI CAP | 4.59%   |
| INVESCO INDIA MULTICAP FUND - GROWTHMULTI CAP FUND                         | 4.59%   |

## MUTUAL FUND (ELSS)

| ELSS FUND  | JUNE 21 |
|--|---------|
| INVESCO INDIA MULTICAP FUND - GROWTHMULTI CAP FUND                                       | 11.37%  |
| SUNDARAM LONG TERM MICRO CAP TAX ADVANTAGE FUND - SERIES VI - REGULAR PLAN - GROWTHELSS  | 10.05%  |
| SBI LONG TERM ADVANTAGE FUND - SERIES IV - REGULAR PLAN - GROWTHELSS                     | 9.99%   |
| SUNDARAM LONG TERM MICRO CAP TAX ADVANTAGE FUND - SERIES III - REGULAR PLAN - GROWTHELSS | 9.72%   |
| SUNDARAM LONG TERM MICRO CAP TAX ADVANTAGE FUND - SERIES IV - GROWTHELSS                 | 9.22%   |

# GLOBAL COVERAGE - EQUITY

## WORLD INDICES

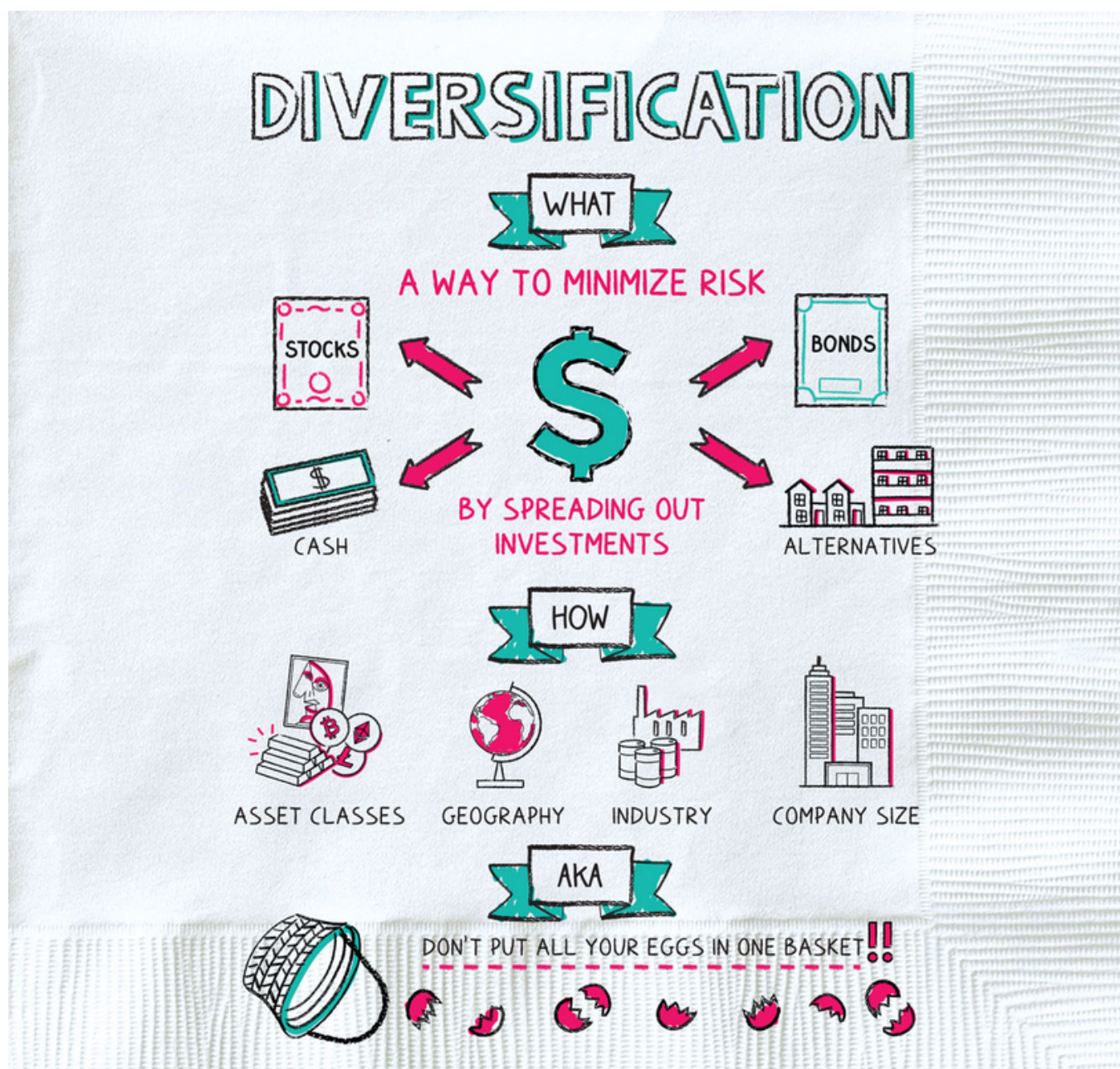
| WORLD INDICES    | % CHANGE |
|------------------|----------|
| DJI              | -0.21%   |
| NASDAQ COMPOSITE | 5.59%    |
| S&P 500          | 2.27%    |
| FTSE 100         | -0.61%   |
| DAX              | -0.23%   |

## TOP GAINERS - S&P 500

| TOP GAINERS -S&P 500 | % CHANGE |
|----------------------|----------|
| ENPHASE ENERGY INC.  | 31.69%   |
| BIOGEN INC.          | 29.62%   |
| ETSY INC.            | 25.93%   |
| NRG ENERGY INC.      | 24.88%   |
| NVIDIA CORPORATION   | 22.98%   |

## MARKET SYNOPSIS

- WORLD BANK APPROVES USD 500 MILLION LOAN TO SUPPORT INDIA'S INFORMAL WORKING CLASS AMID PANDEMIC
- GIFT CITY JOIN HANDS WITH BRTSIF TO ACCELERATE FINTECH INNOVATION
- DABUR ANNOUNCES FRESH INVESTMENT OF RS 550 CRORE
- WARREN BUFFETT'S EXIT FROM THE GATES FOUNDATION CLOUDS ITS FUTURE
- GOVERNMENT CUTS IMPORT DUTY ON CRUDE PALM OIL TO 10%
- COUNTRIES BACK GLOBAL MINIMUM CORPORATE TAX OF 15%



**DIVERSIFICATION** IS SIMPLY THE STRATEGY OF SPREADING OUT YOUR MONEY INTO DIFFERENT TYPES OF INVESTMENTS, WHICH REDUCES RISK WHILE STILL ALLOWING YOUR MONEY TO GROW. IT'S ONE OF THE MOST BASIC PRINCIPLE OF INVESTING.

## KNOWLEDGE CORNER

When we talk about diversification, we often recommend having various types of investments (called asset classes) in your portfolio. Here are the most common asset classes:

- Mutual funds
- Single stocks
- Bonds
- Exchange-traded funds (ETFs)
- Index funds
- Real estate



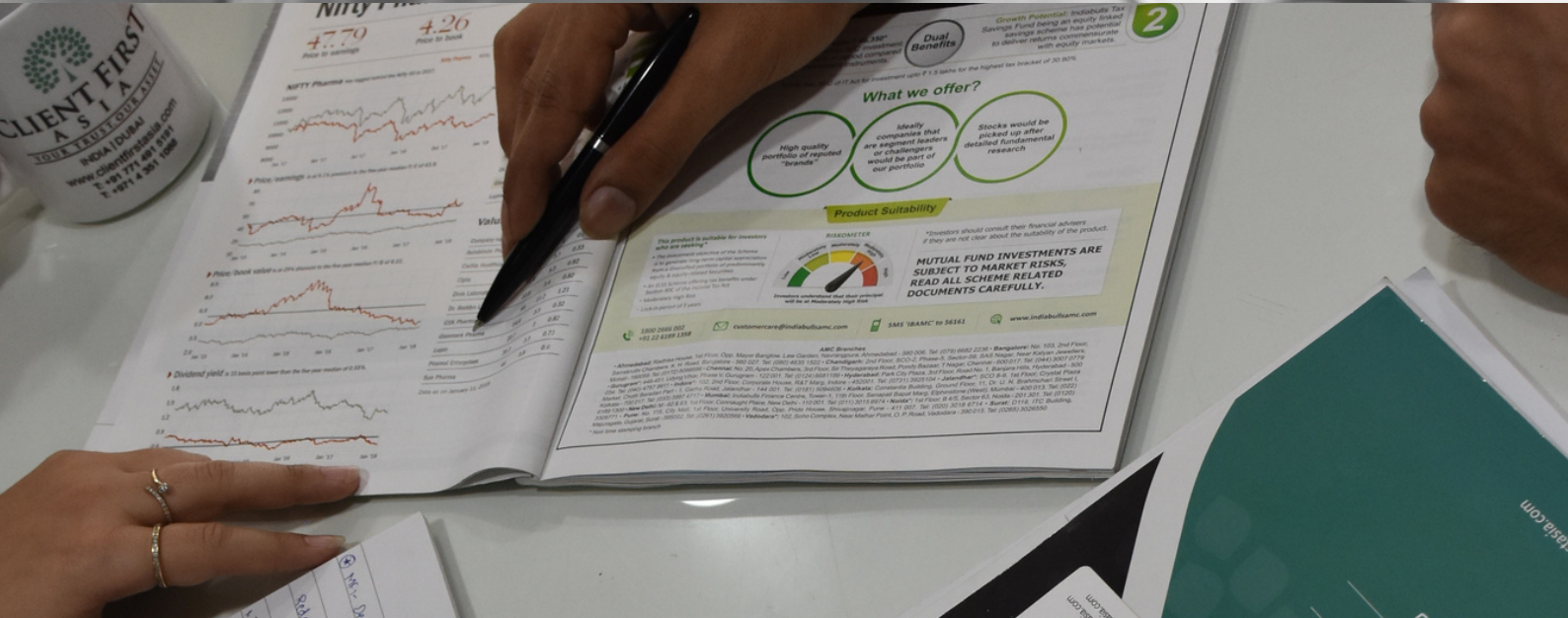
### Asset Allocation

Asset allocation involves dividing an investment portfolio among different asset categories, such as stocks, bonds, and cash. The asset allocation that works best for you at any given point in your life will depend largely on your time horizon and your ability to tolerate risk.

- *Time Horizon*

Your time horizon is the expected number of months, years, or decades you will be investing to achieve a particular financial goal. An investor with a longer time horizon may feel more comfortable taking on a riskier, or more volatile, investment because he or she can wait out slow economic cycles and the inevitable ups and downs of our markets





## KNOWLEDGE CORNER

- *Risk Tolerance*

Risk tolerance is your ability and willingness to lose some or all of your original investment in exchange for greater potential returns. An aggressive investor, or one with a high-risk tolerance, is more likely to risk losing money in order to get better results. A conservative investor, or one with a low-risk tolerance, tends to favor investments that will preserve his or her original investment. In the words of the famous saying, conservative investors keep a “bird in the hand,” while aggressive investors seek “two in the bush.”

### Conclusion

By picking the right group of investments, you may be able to limit your losses and reduce the fluctuations of investment returns without sacrificing too much potential gain.

It is the tendency of Indians to allocate most of their wealth in physical assets such as gold and real estate. But it is evident that the financial assets such as stocks has outclassed physical asset in the long run. And that’s why our financial experts suggest to diversify your portfolio according to your long term and short term goals.



# EVENTS DETAILS



You must have heard the slang "TGIF" But as market keeps us busy even on Fridays, Therefore we have started "TGIS" - Thank God it's Saturday

Team Building is not about having outing, lunch or dinner together but its more about creating an environment of trust and empowerment where team members can team up to achieve great results together.



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