



Way2Wealth ETF Basket Fact Sheet

(Regular Indices ETFs)

Way2Wealth ETF Basket	
Basket Name	Regular Indices ETFs
Category	Basket
Benchmark Index	Nifty 500
Status	Active
Review Frequency	Quarterly
Launch Date	7 th April 2025
Rational	Investing in regular indices is a sound strategy for long-term investors who seek broad market exposure with lower risks and costs. With the availability of index mutual funds, ETFs, and sector-specific indices, investors can diversify their portfolios. Index investing, while efficient and cost-effective, is not immune to market risks. Clients should weigh the pros and cons based on their financial goals, risk tolerance, and investment horizon. With lower expense ratios than actively managed funds, index funds maximize returns by minimizing costs. Index based ETF's eliminate fund manager biases and focus solely on market performance.
Risk Factor	High
Investment Period	Long Term
Description	This basket invests in Regular Indices ETFs, offering a simple and cost-effective way to build long-term wealth. By tracking well-known indices like the Nifty 50 and Sensex, it provides instant diversification and minimizes the risk of poor stock selection.

Sr No.	ETF Name	Weightage	NAV as on 4 th April 25	Closing Market Price (NSE) as on 4 th April 25
1	Nippon India ETF Nifty 100	20%	246.12	248.00
2	SBI Nifty Next 50 ETF	20%	650.63	655.00
3	Mirae Asset Nifty 500 Multicap 50:25:25 ETF	20%	14.34	14.38
4	Nippon India ETF Nifty Midcap 150	20%	191.92	193.89
5	HDFC Small cap 250 ETF	20%	148.35	149.32
	Total	100%		

Inception/Allotment date
22 March 2013

Scheme Features

Type	Open-ended
Fund Manager	Mr. Himanshu Mange
Expense ratio	0.5%
Benchmark	Nifty 100 TRI
Net Asset Value (NAV):	Rs. 246.12 (as of 4 th April, 2025)
Market Price:	Rs. 248.00 (as of 4 th April, 2025)
Risk Level:	Very High
AUM:	Rs. 277 Cr.

Portfolio Composition

The fund's portfolio is diversified across various sectors, with significant allocations in:

Sector	Portfolio Weight
Financial services	32.5%
IT	11.8%
Oil, Gas & consumable fuels	9.1%
FMCG	8.1%
Auto	7.0%
Healthcare	4.4%
Power	4.0%
Consumer Services	3.8%
Metals & Mining	3.5%
Telecommunication	3.3%

Asset Allocation:

Asset Allocation % Net

Equity: 99.91
Debt :0.00
Other: 0.09

Fund Manager

Scheme Inception date is 22/03/2013.

- **Mr. Himanshu Mange** - Has been managing the fund since December 2023. Exchange Traded Fund Manager at Nippon India Mutual Fund and is also responsible for ETF dealing desk. He is a commerce graduate from Mumbai University and a qualified Chartered Accountant. He has over 4 years of experience in Life Insurance and asset management industry. Mr. Mange has been managing this fund since December 2023.

Investment Objective

The investment objective of the scheme is to provide investment returns that, before expenses, closely correspond to the total returns of the securities as represented by the Nifty 100 Index, subject to tracking errors. However, there can be no assurance or guarantee that the investment objective of the Scheme will be achieved.

Investment Strategy

- The ETF tracks the Nifty 100 TRI index which represents the performance of the top 100 companies listed on the National Stock Exchange (NSE) giving lower volatility with Nifty 50 stocks and growth opportunities by investing in the Next 50 companies.
- The Product universe comprises Large-cap companies investing across financials, IT, Oil gas & Consumables, FMCG & Auto etc.

Performance Overview

Scheme	6 Months	1 Year	3 Year	5 Year
Nippon Nifty 100 ETF	-2.92	10.37	11.62	15.20
Nifty 100 TRI	-2.67	10.98	12.21	15.99

The fund closely matches the index's performance, making it a strong choice for investors seeking reliable tracking of the Nifty 100 TRI index

Risk Measures

Sortino-12Months-1Days	1.3
Large Cap Market Classification	98.7
Mid-Cap Market Classification	1.2
Small Cap Market Classification	0.0
Downside Capture Ratio	105.04
Upside Capture Ratio	110.69
Net Capture Ratio	1.05

The Nippon India ETF Nifty 100 offers a balanced risk-return profile, effectively managing downside risk while delivering strong returns. It has outperformed the Nifty 50 during market upswings but slightly underperformed during declines.

Top holding :

Asset Name	Sector	% of Net Asset
HDFC Bank	Financial Services	10.3%
ICICI Bank	Financial Services	6.9%
Reliance Industries	Oil, Gas & consumable fuels	6.3%
Infosys	IT	5.1%
ITC Ltd.	FMCG	3.4%
Bharti Airtel	Telecommunication	3.3%
Larsen & Toubro	Construction	3.3%
TCS	IT	3.2%
SBI	Financial Services	2.3%
Axis Bank	Financial Services	2.3%

Who should invest

- The Nippon India ETF Nifty 100 is suitable for investors with a long-term investment horizon, seeking capital growth through diversified exposure to large-cap stocks in India.
- Suitable for Investors looking to diversify their portfolio across multiple sectors with a single investment.
- The fund is suitable for investors seeking investment in equity & equity related instruments and portfolios replicating composition of the Nifty 100 Index, subject to tracking errors.
- Investors preferring a low-cost, passive investment approach.

Conclusion

- The Nippon India ETF Nifty 100 presents an attractive investment opportunity for those looking to gain diversified exposure to large-cap Indian companies.
- It has delivered competitive trailing returns, closely aligning with its benchmark over various time frames.
- Additionally, the ETF demonstrates strong risk-adjusted performance, evidenced by its Sortino ratio as mentioned above. Its impressive net capture ratio further highlights its ability to outperform the broader market during both upswings and downturns.
- The ETF offers exposure to 100 large-cap stocks from 37 different industries, providing excellent diversification
- With its low expense ratio, strong returns, and diversified exposure to large-cap stocks across multiple sectors, the Nippon India ETF Nifty 100 is highly recommended for investors looking for a cost-effective, diversified investment option with a solid growth potential in India's leading companies.

Inception/Allotment date
25 March 2015

Scheme Features

Type	Open-ended
Fund Manager	Mr. Raviprakash Sharma
Expense ratio	0.15%
Benchmark	Nifty Next 50 TRI
Net Asset Value (NAV):	Rs. 650.63 (as of 4 th April, 2025)
Market Price:	Rs. 655.00 (as of 4 th April, 2025)
Risk Level:	Very High
AUM:	Rs. 2947 Cr.

Portfolio Composition

The fund's portfolio is diversified across various sectors, with significant allocations in:

Sector	Portfolio Weight
Financial services	23.7%
Consumer Services	13.8%
Power	9.4%
FMCG	8.4%
Capital Goods	8.3%
Healthcare	5.5%
Auto	5.4%
Oil, Gas and consumable fuels	5.1%
Metals & Mining	4.5%
Realty	3.8%

Asset Allocation
Asset Allocation % Net

Equity: 99.95
Debt :0.00
Other: 0.05

Fund Manager

Scheme Inception date is 25/03/2015. Mr. Raviprakash Sharma has been managing the fund since March 2015.

- **Mr. Raviprakash Sharma:** Has over 24 years of experience in India Capital markets.

Investment Objective

The investment objective of the scheme is to provide returns that closely correspond to the total returns of the securities as represented by the underlying index, subject to tracking error. However, there is no guarantee or assurance that the investment objective of the scheme will be achieved.

Investment Strategy

- The SBI Nifty Next 50 ETF tracks the Nifty Next 50 TRI index which invests in 50 companies from the Nifty 100 after excluding the Nifty 50 companies.
- The Product universe comprises Large-cap companies investing across financials, consumer services, Power, FMCG etc.,

Performance Overview

Scheme	6 Months	1 Year	3 Year	5 Year
SBI Nifty Next 50 ETF	-9.55	15.61	15.76	18.19
Nifty Next 50 TRI	-9.48	15.79	15.96	18.48

The fund closely matches the index's performance, making it a strong choice for investors seeking reliable tracking of the Nifty Next 50 index

Risk Measures

Sortino-12Months-1Days	1.6
Large Cap Market Classification	93.4
Mid-Cap Market Classification	6.5
Small Cap Market Classification	0.0
Downside Capture Ratio	126.6
Upside Capture Ratio	162.3
Net Capture Ratio	1.3

The SBI Nifty Next 50 ETF offers strong potential for investors seeking exposure to the Nifty 50 index. It demonstrates solid risk-adjusted returns and performs well during favorable market conditions. While its downside capture is higher, its overall performance suggests it can outperform the Nifty 50 benchmark.

Top holding :

Asset Name	Sector	% of Net Asset
Zomato Ltd	Consumer Services	4.25%
Jio Financial Services	Financial Services	3.77%
Interglobe Aviation Ltd.	Services	3.61%
Varun Beverages Ltd.	FMCG	3.23%
Hindustan Aeronautics Ltd.	Capital Goods	3.20%
Divi's Laboratories	Healthcare	3.16%
Vedanta	Metals & Mining	3.02%
Info Edge	Consumer Services	2.95%
Tata Power	Power	2.76%
Power Finance Corp. Ltd.	Financial Services	2.74%

Who should invest

- Investors seeking long-term capital appreciation with a high-risk appetite.
- Investors who are comfortable with market volatility and slight tracking errors.
- The fund is suitable for investors seeking investment in equity & equity related instruments and portfolios replicating composition of the Nifty next 50 Index, subject to tracking errors.
- Investors preferring a low-cost, passive investment approach.

Conclusion

- The SBI Nifty Next 50 ETF is a strong investment option for those seeking long-term growth with exposure to emerging Indian companies
- It has delivered competitive trailing returns, closely aligning with its benchmark over various time frames.
- Additionally, the ETF demonstrates strong risk-adjusted performance, evidenced by its Sortino ratio as mentioned above. Its impressive net capture ratio further highlights its ability to outperform the broader market during both upswings and downturns.
- Given these factors—strong historical returns, solid risk-adjusted performance, and a cost-efficient structure—the SBI Nifty Next 50 ETF is highly recommended for investors seeking long-term growth, exposure to emerging businesses, and a balanced approach to risk and return.
- It is particularly well-suited for those with a high-risk tolerance, a long-term investment horizon, and a focus on capitalizing on India's evolving market landscape.

Inception/Allotment date
30 August 2024

Scheme Features

Type	Open-ended
Fund Manager	Miss. Ekta Gala, Mr. Vishal Singh
Expense ratio	0.16%
Benchmark	Nifty 500 Multicap 50:25:25 TRI
Net Asset Value (NAV):	Rs. 14.34 (as of 4 th April,2025)
Market Price:	Rs. 14.38 (as of 4 th April,2025)
Risk Level:	Very High
AUM:	Rs. 38 Cr.

Portfolio Composition

The fund's portfolio is diversified across various sectors, with significant allocations in:

Sector	Portfolio Weight
Financial services	26.5%
IT	9.1%
Capital Goods	8.3%
Healthcare	8.2%
Auto	6.3%
FMCG	6.1%
Oil, Gas, & consumable fuels	5.9%
Consumer Durables	3.8%
Consumer Services	3.8%
Chemicals	3.4%

Asset Allocation:
Asset Allocation % Net

Equity: 99.81
Debt :0.00
Other: 0.19

Investment Objective

The Investment objective of the scheme is to generate returns, before expenses, that are commensurate with the performance of the Nifty 500 Multicap 50:25:25 Total Return Index, subject to tracking error. There is no assurance or guarantee that the investment objective of the scheme would be achieved.

Investment Strategy

- The investment approach for this ETF is designed to track the performance of the Nifty 500 Multicap 50:25:25 TRI index.
- The ETF provide exposure to companies across different market capitalizations offering diversification within a single fund providing exposure to a wide range of industries and sectors.
- The inclusion of mid and small-cap stocks adds growth potential, while the large-cap stocks offer low volatility.
- The product universe comprises Large, Mid, and small-cap companies investing across financials, IT, Capital goods, Healthcare, Auto, etc.

Performance

Scheme	1 Month	2 Months	3 Months	4 Months
Mirae asset Nifty 500 Multicap 50:25:25 ETF	-5.74	-7.24	-4.63	-8.35
Nifty 500 Multicap 50:25:25 TRI	-5.74	-7.23	-4.61	-8.32

The fund closely matches the index's performance, making it a strong choice for investors seeking reliable tracking of the Nifty 500 Multicap 50:25:25 index.

MCAP Allocation

Large Cap Market Classification	49.5
Mid-Cap Market Classification	25.9
Small Cap Market Classification	24.3

Fund Manager

Scheme Inception date is 30/08/2024. Miss. Ekta Gala, Mr. Vishal Singh has been managing the fund since December 2023.

- Mr Vishal Singh** – Has overall 5 years of experience.

Top holding :

Asset Name	Sector	% of Net Asset
HDFC Bank	Financial Services	5.1%
ICICI Bank	Financial Services	3.4%
Reliance Industries	Oil, Gas & Consumable fuels	3.1%
Infosys	IT	2.6%
ITC Ltd.	FMCG	1.7%
Bharti Airtel	Telecommunication	1.6%
Larsen & Toubro	Construction	1.6%
TCS	IT	1.6%
SBI	Financial Services	1.2%
Axis Bank	Financial Services	1.1%

Who should invest

- Investors seeking long-term capital appreciation with a high-risk appetite.
- Suitable for Investors who are looking to balance growth and stability by leveraging a mix of large, mid, and small-cap stocks.
- The fund is suitable for investors seeking diversified exposure to large, mid and small cap stocks offering growth potential and lower volatility, aiming to mirror the performance of the Nifty500 Multicap 50:25:25 Total Return Index over the long term, despite potential tracking errors.
- Investors preferring a low-cost, passive investment approach.

Conclusion

- The Mirae Asset Nifty 500 Multicap 50:25:25 ETF offers a uniquely diversified investment solution by combining exposure to large, mid, and small cap stocks in a balanced 50:25:25 mix.
- Back tested data demonstrates that the index has outperformed both the Nifty 50 and Nifty 500 indices over the long term, delivering superior compounded returns while managing risk and reducing drawdowns.
- This ETF has managed to closely replicate index returns.
- It would be recommended to invest in this ETF as it offers a cost-effective and diversified way to capture broad market gains with an optimal blend of risk and return.

Inception/Allotment date
31 January 2019

Scheme Features

Type	Open-ended
Fund Manager	Mr. Himanshu Mange
Expense ratio	0.21%
Benchmark	Nifty Midcap 150 TRI
Net Asset Value (NAV):	Rs. 191.92 (as of 4 th April, 2025)
Market Price:	Rs. 193.89 (as of 4 th April, 2025)
Risk Level:	Very High
AUM:	Rs. 1914 Cr.

Portfolio Composition

The fund's portfolio is diversified across various sectors, with significant allocations in:

Sectors	Portfolio Weight
Financial services	20.0%
Capital Goods	14.2%
Healthcare	11.4%
IT	7.9%
Auto	7.4%
Chemicals	6.1%
Consumer Durables	4.6%
Consumer Services	4.0%
FMCG	3.9%
Realty	3.8%

Asset Allocation:

Asset Allocation % Net
Equity: 99.94
Debt: 0.00
Other: 0.06

Fund Manager

Scheme Inception date is 31/01/2019.

• **Mr. Himanshu Mange** - Exchange Traded Fund Manager at Nippon India Mutual Fund and is also responsible for ETF dealing desk. He is a commerce graduate from Mumbai University and a qualified Chartered Accountant. He has over 4 years of experience in Life Insurance and asset management industry. Mr. Mange has been managing this fund since December 2023.

Investment Objective

The investment objective of the scheme is to provide investment returns closely corresponding to the total returns of the securities as represented by the NIFTY Midcap 150 Index before expenses, subject to tracking errors. However, there can be no assurance or guarantee that the investment objective of the Scheme will be achieved.

Investment Strategy

- Nippon India ETF Nifty Midcap 150 invest in the 150 midcap companies (companies ranked 101-250) based on full market capitalization from Nifty 500.
- The scheme comprises index constituent stocks representing midcaps, relatively well-established companies across keys.
- The product universe consists of Midcap companies investing across financials, Capital goods, Healthcare, IT, Auto, etc.

Performance Overview

Scheme	6 Months	1 Year	3 Year	5 Year
Nippon Midcap 150 ETF	-3.49	12.20	20.91	25.08
Nifty Midcap 150 TRI	-3.36	12.46	21.20	25.40

The fund closely matches the index's performance, making it a strong choice for investors seeking reliable tracking of the Nifty Midcap 150 index.

Risk Measures

Sortino-12Months-1Days	2.0
Large Cap Market Classification	1.5
Mid-Cap Market Classification	95.0
Small Cap Market Classification	3.4
Downside Capture Ratio	113.5
Upside Capture Ratio	180.5
Net Capture Ratio	1.6

The fund has delivered strong risk-adjusted returns, outperforming the Nifty 50 during market upswings while maintaining disciplined risk management during downturns. This balanced performance makes it an attractive choice for investors seeking growth with controlled risk.

Top holding:

Asset Name	Sector	% of Net Asset
Max healthcare Institute Ltd.	Healthcare	2.45%
The Indian Hotels Company Limited	Consumer Services	2.26%
Suzlon Energy Ltd.	Capital Goods	2.16%
BSE Limited	Financial Services	2.12%
PB Fintech Limited	Financial Services	2.04%
Dixon Technologies	Consumer Durables	2.01%
Persistent system limited	IT	2.00%
Coforge Ltd.	IT	1.89%
Lupin Ltd.	Healthcare	1.66%
The Federal bank Ltd.	Financial Services	1.43%

Who should invest

- Investors seeking long-term capital appreciation with a high-risk appetite.
- Suitable for investors seeking higher returns by participating in India's growth story through midcap companies, which generally have greater growth potential than large caps.
- The fund is suitable for investors seeking investment in equity & equity related instruments and portfolios replicating composition of the Nifty Midcap 150 TRI, subject to tracking errors.
- Investors preferring a low-cost, passive investment approach.

Conclusion

- This ETF has managed to closely replicate index returns as well as it's higher Sortino and Up capture ratio indicates it has delivered attractive returns relative to risk taken, thereby managing to outperform the Nifty 50 Index.
- It gives broad exposure to emerging companies with high growth potential, all managed through a transparent, index-based approach.
- While small-cap stocks can be more volatile, if you have a long-term investment horizon and are comfortable with some market fluctuations, this ETF can serve as a strategic tool to enhance your portfolio's growth prospects while keeping costs low.
- It would be recommended to invest in this ETF as it offers a cost-effective and diversified way to tap into India's promising small-cap segment.

Inception/Allotment date
15 February 2023

Scheme Features

Type	Open-ended
Fund Manager	Arun A., Abhishek M, Nirman M.
Expense ratio	0.20%
Benchmark	Nifty Small cap 250 TRI
Net Asset Value (NAV):	Rs. 148.35 (as of 4 th April, 2025)
Market Price:	Rs. 149.32 (as of 4 th April, 2025)
Risk Level:	Very High
AUM:	Rs. 810 Cr.

Portfolio Composition

The fund's portfolio is diversified across various sectors, with significant allocations in:

Sector	Portfolio Weight
Financial services	21.0%
Capital Goods	14.4%
Healthcare	12.6%
Chemicals	6.6%
Consumer Durables	6.5%
IT	5.1%
FMCG	4.3%
Auto	4.0%
Construction	3.9%
Consumer Services	3.7%

Asset Allocation

Asset Allocation % Net

Equity: 99.97
Debt : 0.00
Other: 0.03

Investment Objective

To generate returns that are commensurate (before fees and expenses) with the performance of the NIFTY Small cap 250 Index, subject to tracking error. There is no assurance that the investment objective of the Scheme will be realized.

Investment Strategy

- HDFC Nifty Small Cap 250 ETF tracks the Nifty Small Cap 250 TRI index which invests in the top small-cap companies (companies ranked 251-500 based on market cap) consisting of 250 listed small-cap stocks.
- The ETF provides exposure to the growth potential of small-cap companies in India offering the potential for compelling risk-adjusted returns, especially over the long term.
- The product universe consists of small cap companies investing across financials, Capital goods, Healthcare, Chemicals, Consumer Durables, etc.

Performance Overview

Scheme	1 Month	3 Months	6 Months	1 Year
HDFC Nifty Small cap 250 ETF	-7.75	-10.64	-4.59	5.31
Nifty Small cap 250 TRI	-7.74	-10.60	-4.29	5.79

The fund closely matches the index's performance, making it a strong choice for investors seeking reliable tracking of the Nifty Small cap 250 index

Risk Measures

Sortino-12Months-1Days	2.5
Large Cap Market Classification	-
Mid-Cap Market Classification	6.6
Small Cap Market Classification	93.4
Downside Capture Ratio	164.5
Upside Capture Ratio	227.3
Net Capture Ratio	1.4

The fund demonstrates strong risk-adjusted returns with high upside capture, although it carries increased downside exposure during market declines. Its overall performance makes it attractive for investors seeking significant upside potential while managing the risks of market downturns

Fund Manager

Scheme Inception date is 15/02/2023. Mr Arun A., Abhishek M, Nirman M. has been managing the fund since January 2023.

- Mr. Arun Agarwal** - Has around 7 years of experience in equity markets.

Top holding :

Asset Name	Sector	% of Net Asset
Multi commodity exchange of India	Financial Services	1.6%
CDSL	Financial Services	1.6%
Blue Star Ltd.	Consumer Durables	1.4%
Crompton Greaves Consumer Elec Ltd.	Consumer Durables	1.3%
360 One WAM Ltd.	Financial Services	1.2%
CAMS	Financial Services	1.2%
Glenmark Pharma Ltd.	Healthcare	1.2%
Laurus Labs Ltd.	Healthcare	1.2%
GE T&D India Ltd.	Capital Goods	1.1%
Radico Khaitan Ltd.	FMCG	1.0%

Who should invest

- Investors seeking long-term capital appreciation with a high-risk appetite.
- The fund is suitable for investors who are interested in gaining exposure to the small cap segment of companies in India and are seeking investment in equity & equity related instruments and portfolios replicating composition of the Nifty Small Cap 250 TRI, subject to tracking errors.
- Investors preferring a low-cost, passive investment approach.

Conclusion

- The HDFC Nifty Small Cap 250 ETF stands out as a compelling investment option for those looking to capitalize on the growth potential of India's small-cap segment. The fund offers broad diversification and cost efficiency while closely tracking the Nifty Small Cap 250 Index.
- It has delivered competitive trailing returns, closely aligning with its benchmark over various time frames.
- Additionally, the ETF demonstrates strong risk-adjusted performance, evidenced by its high Sortino ratio as mentioned above. This indicates attractive returns relative to downside risk. Its impressive net capture ratio further highlights its ability to outperform the broader market during both upswings and downturns.
- It is recommended to invest for investors with a long-term horizon and a higher risk tolerance, as this ETF offers a strategic avenue for tapping into the high-growth potential of small-cap stocks while maintaining disciplined risk management.

Market Outlook

- The RBI cut its benchmark interest rate by 25 bps for the first time in nearly five years, projecting inflation at 4.8% for FY-25 and 4.2% for FY-26, within its target range which may support the rate cut scenario in the upcoming monetary policy meetings. This move, along with liquidity measures from the Union Budget, is expected to boost investment, consumer spending, production, and overall economic growth.
- The Indian markets have corrected in the past few months as they were overvalued and are expected to stay volatile in the near term due to factors such as escalating tariff tensions, selling pressure on the market from the FIIs, weak rupee, and corporate earnings.
- However, the medium and long-term outlook remains optimistic fueled by policy continuity, benefits from Production-Linked Incentive schemes, opportunities arising from shifts in the global supply chain, enhanced infrastructure investments, the potential of resurgence in private sector capex, and the enduring robustness of consumption.
- Hence, the structural growth outlook for India's economy may remain intact which may stabilize the Indian Markets offsetting the impact of the negative sentiments by the global uncertainties and FII outflows.

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