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Launching mutual fund smallcases



Vasanth Kamath
Founder & CEO

smallcases are playlists for securities



- Readymade model portfolios of securities

- Reflects a certain strategy, theme or objective

- Managed by SEBI-regd investment professionals

- Investors hold underlying securities, so complete visibility & control

What started as a concept is now an established product class

SCALE

₹2,00,000+
crores

assets transacted in
smallcases since 2016

BREADTH

500+
smallcases

wide catalog across
asset allocation, factor
models, thematic &
sectoral

DEPTH

25%+
average allocation

significant share in
smallcase investors'
equity portfolios

FRAMEWORK

**Model Portfolio
Guidelines**

standardized industry
framework as a
regulated activity

Enabled by a fast-growing ecosystem offering smallcases

MANUFACTURERS

140+
investment managers

RA/IA/AMC across established & emerging managers, research houses, ex-CIOs & institutions

INVESTORS

95%+
active demat base coverage

Top 20 brokerages integrated for seamless access in their existing trading/demat accounts

DISTRIBUTORS

200+
platforms & IFAs

Brokers, wealth platforms, IFA & networks, smallcases app

Expanding on underlying assets to increase use-cases & portfolio share



ETFs

REITs &
InvITs



Mutual Funds

Direct plans | AMC agnostic | via RTAs

A portfolio/goal-based approach towards MF investing

Parking Reserves

< park cash

All **smallcases** Mutual Funds Stocks Collections



Park Cash - 1 Week

Mutual Fund smallcase [Free Access](#)

Ideal for parking surplus cash for up to 1 week

1M Returns **0.54%** Min. Amount **₹ 300** [Low Volatility](#)



Park Cash - 3 Months

Mutual Fund smallcase [Free Access](#)

Ideal for parking surplus cash between 7 and 90 days

1M Returns **0.55%** Min. Amount **₹ 3,000** [Low Volatility](#)



Park Cash - 6 Months

Mutual Fund smallcase [Free Access](#)

Ideal for parking surplus cash between 3 and 6 months

1M Returns **0.08%** Min. Amount **₹ 300** [Low Volatility](#)



Park Cash - 1 Year (Tax-Smart)

Mutual Fund smallcase [Free Access](#)

Ideal for parking surplus cash between 6 and 12 months. For investors in the high tax bracket

Fund Picks

< picks

All **smallcases** Mutual Funds Stocks Collections



Largecap Mutual Fund Picks

Mutual Fund smallcase [Free Access](#)

Focused portfolio of largecap funds selected to outperform the category

8M Returns **-1.46%** Min. Amount **₹ 3,000** [High Volatility](#)



Midcap Mutual Fund Picks

Mutual Fund smallcase [Free Access](#)

Focused portfolio of midcap funds selected to outperform the category

8M Returns **5.95%** Min. Amount **₹ 300** [High Volatility](#)



Smallcap Mutual Fund Picks

Mutual Fund smallcase [Free Access](#)

Focused portfolio of smallcap funds selected to outperform the category

8M Returns **5.27%** Min. Amount **₹ 20,000** [High Volatility](#)



Flexicap Mutual Fund Picks

Mutual Fund smallcase [Free Access](#)

Focused portfolio of flexicap funds selected to outperform the category

8M Returns **1.12%** Min. Amount **₹ 3,000** [High Volatility](#)

Multi-Asset



Strategic Mix MF smallcases

Stock smallcases

Mutual fund portfolios combining equities with exposure to gold, silver



GoalFI Stable Income Asset Allocation

Mutual Fund smallcase [Free Access](#)

A low-volatility mutual fund allocation model designed for capital stability and steady income.

2M Returns **-0.08%** Min. Amount **₹ 20,000** [Low Volatility](#)



GoalFI Balanced Growth Asset Allocation

Mutual Fund smallcase

A multi-asset allocation model designed for long-term wealth creation with controlled volatility.

2M Returns **1.42%** Min. Amount **₹ 20,000** [High Volatility](#)



Gold & Silver 60/40 Asset Allocation

Mutual Fund smallcase [Free Access](#)

Combining Gold & Silver – A simple model for commodity exposure.

4M Returns **6.57%** Min. Amount **₹ 250** [High Volatility](#)



All-in-1 Asset Allocation

Mutual Fund smallcase [Free Access](#)

Park cash for emergencies & short-term needs, while investing in equity &

Target-Date

< horizon

All **smallcases** Mutual Funds Stocks Collections



Horizon 2035 Target Date

Stock smallcase

Optimizes investment value for goals to be achieved in 2035

5Y CAGR **10.32%** Min. Amount **₹ 2,797** [Low Volatility](#)



Horizon 2055 Target Date

Stock smallcase

Optimizes investment value for goals to be achieved in 2055

5Y CAGR **13.80%** Min. Amount **₹ 7,229** [Low Volatility](#)



Horizon 2045 Target Date

Stock smallcase

Optimizes investment value for goals to be achieved in 2045

5Y CAGR **12.06%** Min. Amount **₹ 3,819** [Low Volatility](#)



Horizon 2030 Target Date

Stock smallcase

Optimizes investment value for goals to be achieved in 2030

5Y CAGR **9.22%** Min. Amount **₹ 4,398** [Low Volatility](#)

Other markets have already seen this playbook

SCALE

\$5.1+
trillion

assets in model
portfolios, expected to
double by end of decade

BREADTH

80%
IFA adoption

usage of model
portfolios as part of
holistic advice

VARIETY

Multiple
creator types

RIA in-house, outsourced
CIOs, leading asset
managers

USECASES

Tactical & Whole
Portfolios

Goal-based investing,
Income, Retirement,
Multi-asset