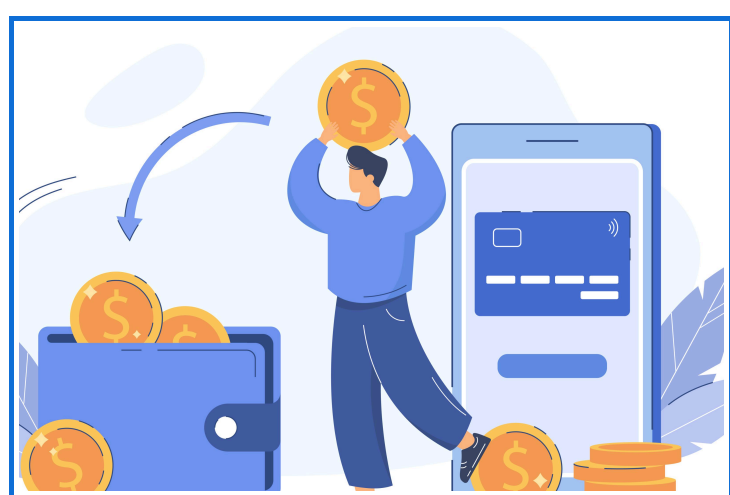


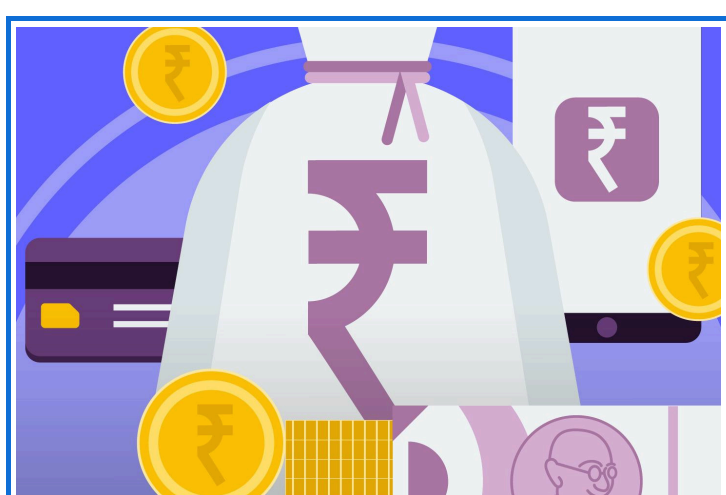
January 2025-Newsletter



What Are Rolling Returns in Mutual Funds

We explore the concept of rolling returns in mutual funds and their importance for investors. Rolling returns measure a fund's performance over various overlapping periods, providing a complete view rather than relying on fixed timeframes. This approach helps assess consistency and volatility, offering deeper insights into a fund's historical performance.

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Risk Profiling is the First Step Towards Smart Mutual Fund

We highlight the importance of risk profiling as the first step toward smart mutual fund investing. Just like a strong house needs a solid foundation, understanding your risk tolerance is important for selecting the right mutual funds. Risk profiling helps customise your investments to your comfort level, ensuring you avoid unnecessary stress from market changes.

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How to Book Profits in Mutual Funds?

We share the necessary steps for booking profits in mutual funds. First, clarify your objective, are you aiming to meet a financial goal or reduce risk? Set a reasonable target for returns, such as 15% annually, and consider booking profits once achieved. Rebalancing your portfolio is important, as change returns can create imbalances.

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Mistakes That Can Cost You Your Financial Goals

We discuss seven common asset allocation mistakes that can be subject to your financial goals. Many investors ignore their risk hardness, leading to misaligned investments. Failing to rebalance your portfolio regularly can also create an unintended asset mix. Additionally, following the crowd instead of sticking to your strategy can be harmful.

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Common Mistakes to Avoid when Investing in Mutual Funds

Here are some common mistakes to avoid when investing in mutual funds. Many investors start without clear financial goals, which can lead to misaligned investments. Ignoring your risk tolerance is another danger, understanding your comfort with risk is important for selecting the right funds.

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www.bonvista.in

+91 83900 40100

support@bonvista.in