

A Study on Performance Evaluation of Balanced Scheme with Reference to Top 5 Asset Management Companies

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Abstract: Performance evaluation of balanced investment schemes is critical for investors aiming to achieve both growth and stability in their portfolios. This study analyses the performance of balanced schemes offered by selected asset management companies, which blend equity and debt instruments to provide a balanced risk-return profile. By examining key performance indicators such as risk-adjusted returns, and volatility, the research evaluates how these schemes have performed over a specified period. The study utilizes a comparative approach, analysing balanced schemes across different asset management companies, and employs financial metrics like Sharpe ratio, beta, and alpha to measure their effectiveness. The role of external factors, such as market fluctuations, economic conditions, and regulatory changes, is also considered to understand their impact on the schemes' performance. Balanced schemes generally offer moderate returns with lower risk compared to pure equity funds, the performance varies significantly across different fund managers and market conditions.

Keywords: Balanced mutual fund scheme, Performance evaluation, Asset Management Companies (AMCs), evaluation metrics