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Dhirendra Kumar, CEO of Value Research says that the basic principle of any portfolio remains to have a diversified investment strategy.1031viewsRead more about I have the following investments in mutual funds: Axis Long-term Equity Fund - Growth Rs 4,000IDFC Focused Equity Fund - Growth Rs 12,000HDFC Small Cap Fund - Growth Rs Rs Rs Rs Rs Rs Rs Rs 1 5000 (SIP Rs 2000 per month)HDFC Mid-Cap Opportunities Fund - growth Rs 8000 (SIP Rs 2000 per month)Mirae Assets New Bluechip Fund - growth RS RS 6000 (SIP Rs 2000 per month)ICICI Prudential BlueChip Fund - Rise Rs 700 (SIP Rs 100 per month)L'T India Value Fund - Growth - Rs 1000Does my portfolio look good? Do I need to make any changes? I plan to start another SIP Rs 2000. Should I go for a few cap or aggressive hybrid scheme or anything else? Please recommend a mutual fund. I'm an aggressive investor.-Madhavan Balakrishnan We usually ask investors with an aggressive risk appetite to invest mainly in the middle of the cap and small cap schemes. These schemes are risky and they may be unsustainable in the short term, but they have the potential to offer superior returns over a long period. Since you have an aggressive risk profile, you may want to consider investing in these schemes. You can invest an additional amount in an existing mutual fund scheme such as the HDFC Mid-Cap Opportunities Fund. Your current portfolio of mutual funds lacks attention. You are currently investing in a tax savings mutual fund, a multi fund cap, a small fund cap, an average fund cap, a large mid-cap fund, a large fund cap, and a value-focused fund. As mentioned before, you should invest mainly in the middle of the cap and small cap schemes because you have an aggressive appetite for risk. You can also invest a small portion of your enclosure in a multi-cap or large mutual cap fund scheme to diversify your portfolio and reduce overall risk. However, do not over-diversify. This will reduce the overall profit from your portfolio. Download the Economic Times News App to get daily market updates and Live Business News. It is also wrong to assume that people with large investment portfolios are smart investors. But as illogical as it may sound, this false presumption is simply not true. How would I know? Because I've analyzed and evaluated many multi-million dollar investment portfolios ($27 million is the largest I've evaluated so far this year) using my Portfolio Report card evaluation system - and many of these very portfolios are flunked by important factors such as cost, risk, diversification, and productivity. (Audio) How $700 Million People Lost fortune and making higher profits with lower risk What does it mean when seven portfolios figure flunking? Being a good investor doesn't automatically make a person a good investor. On the other hand, the combination of a good savings habit along with a bellicose approach to investment costs, risks, diversification and taxes should to satisfactory performance. My latest Portfolio Report card is for a married couple, SMB, living in Houston, Texas. Both are in their early 50s and they asked me to grade their combined $1.29 million investment portfolio, which consists of two traditional IRA, two Roth IRA, a Roth 401 (k), a 403 (b), a 401 (k) plan, and a brokerage account. SMB told me that they are aggressive investors growing and generating income is a low priority at this stage of their investment plan. The entire $1.29 million portfolio is self-managed. What is the SMB portfolio's valuation? Let's analyze this together. The value of the investment costs that you carry today connects over time and will undermine your investment returns. And that is why reducing the negative impact of trading commissions, fund fees and other friction costs is something that a reasonable investor carefully does. SMB's total portfolio includes 17 mutual funds, 1 individual stock and cash. The weighted average annual expenditure of the fund on mutual funds was 0.39% against 0.20% for our index benchmarks. In other steps, the SMB fund's costs are almost twice as high as the benchmark. This portfolio still has too much fat and can use a diet. Diversifying a truly diversified investment portfolio will always have a broad impact on the market of the five main asset classes: stocks, bonds, commodities, real estate and cash. How are things in the SMB portfolio? SMB has mutual funds that invest in U.S. and international equities (NYSEARCA:EFA) as well as cash. However, the portfolio misses the direct impact of major asset classes such as bonds (NYSEARCA:AGG), commodities (NYSEARCA:DBC) and real estate (NYSEARCA:ICF). In other ways, SMB has a portfolio class of two assets that is much smaller than being truly diversified. The risk of your investment portfolio risk nature should always be 100% compatible with your ability to risk and volatility along with unique financial circumstances, liquidity requirements, and age. In addition, all portfolios - large, small and in between - must have a margin of safety. The total asset mix of SMB's combined portfolio is: 92.2% of shares (NYSEARCA:DIA) and 7.8% cash. Even for aggressive investors in the early 50s, this blend of assets tilts on the hyper-aggressive side. In other words, a 20%-40% market decline would expose the total portfolio to potential market losses from $208,000 to $416,000. The tax efficiency that you eat is what you reap. And a smartly designed investment portfolio takes proactive steps to reduce the tax threat. Possession effective with taxation vehicles and the availability of the right location of assets are two simple steps. About 85% of the SMB portfolio is invested in tax-deferred pension accounts, and they do not have outstanding credit balances or pre-tax pension allocations that have increased their tax bill. Their taxable brokerage account has an impact on Vanguard Vanguard funds with reasonable tax cost ratios. In general, the portfolio of small and medium-sized businesses makes outstanding on tax efficiency. The performance of Investment Indicators will always show whether the investment portfolio is architecturally strong or weak. And satisfactory performance is a direct result of cost control, taxes, risks and diversification. The small and medium-sized business portfolio grew by $91,159 (8.1%) June 2014 to June 2015, compared to a profit of 9.1% for an index benchmark corresponding to their same asset mix. While they are marginally unsatisfactory benchmark, it wasn't much and their portfolio one year performance is satisfactory. The final class of the SMB final portfolio report is a Class B card (good). They scored the best results in the following categories: tax efficiency and productivity. However, this portfolio fell into the risk category. Their 92% exposure to shares is not age appropriate and far beyond just aggressive - it's hyper-aggressive! There is no reserve of strength of small and medium-sized businesses, and a fall in the market by 20%-40% will lead to significant losses of their portfolio. Similarly, the lack of diversified exposure to major asset classes such as real estate, commodities and bonds is the missing ingredient. What about the cost? Although SMB owns several low-budget index funds, the higher cost funds they own unnecessarily increase the overall cost of the portfolio fund. Further reduction in investment costs should increase the long-term net profit of small and medium-sized businesses. Will SMB take steps to correct deficiencies in its portfolio? If they do, I'm sure they'll achieve their financial goals with less risk, less cost and less stress. Ron DeLegge is the founder and chief portfolio strategist at ETFguide. He is the inventor of the Portfolio Report Card, which helps people identify the strengths and weaknesses of their investment account, the IRA, and the 401 (k) plan. Representative image of New Delhi: When choosing a fund scheme (MF) for investments, you need to take care of the investor's appetite for risk, the timing of the investment, and the return of investor expectations. To invest in equity mutual funds, the minimum investment time should be three years. Anyone who wants to invest for less than three years should not invest in shares in MF schemes, say financial planners. Those who are willing to invest in the long term and have a low risk appetite should choose schemes with large capitalization that invest at least 80% of the fund's body in the top 100 companies by market capitalization such as Reliance Industries, HDFC Bank, TCS, Infosys, Bank, HUL, ITC, L'T, HDFC, etc. These companies have a well-followed track record and are leaders in their industry. Thus, these companies fall less during the market downturn. These companies can give a stable return and a wealth complex. However, don't expect multibagger returns. A A A large cap fund can generate between 10-12% CAGR returns in the long run. Those with a moderate risk appetite can allocate one third of their portfolio to medium- and small-cap equity funds and two thirds to large funds. Large funds will give stability to your portfolio, while medium and small capitalization funds will generate aplha for you. But in this strategy, portfolio drawdown may be higher in the event of a market downturn. But aggressive investors, who want higher returns and can incur losses, can also allocate two-thirds of their portfolio to medium- and small-cap funds, and the rest to funds with large capitalization. Small capital funds invest at least 65% of their portfolio in companies that occupy more than 250th place in terms of market capitalization. Small and medium-cap funds have the potential to generate much higher returns than the Sensex benchmark and Nifty returns. In the case of small and large cap funds, if the manager chooses the right shares, long-term earnings may be in high teens. However, financial planners advice that should not pursue the best equity funds as no fund remains the best performer in its segment forever. Investors should periodically review their portfolio and unscor from successive untested. India's best entrepreneurial platform recognizes the best SMEs, SMEs and start-ups of the year. 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