



BRIGHT PLEDGE



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AMFI Registered Mutual Fund Distributor

- Mutual Funds
- Insurance
- Corporate Deposits
- National Pension System (NPS)
- Goal Planning
- Tax Savings (ELSS)
- Children's Gift Fund
- Retirement Savings
- Gold Fund

**START YOUR INVESTMENT JOURNEY WITH US
&
SECURE YOUR FINANCIAL FUTURE.**

www.brightpledge.com

Introduction

Bright Pledge is an independent AMFI Registered Mutual Fund Distributor that offers Mutual Funds, NPS, Company Deposits, and Insurance Services. Our mission is to promote financial awareness by upholding the values of integrity and trust.

Our Services

I. Mutual Funds

A mutual fund is a professionally managed investment fund that pools money from multiple investors to purchase a diversified portfolio of securities. It offers investors diversification, professional management, liquidity, and accessibility to a wide range of investment options.



Investors can choose from a range of mutual fund categories, such as equity, debt, index, balanced, and sectoral funds.

Mutual funds offer benefits such as diversification, professional management, liquidity, accessibility, transparency, and potential for higher returns.



Investors can choose to invest in mutual funds through systematic investment plans (SIPs) or lump sum investments.

ELSS is a tax-saving mutual fund that invests in equity and offers tax benefits up to Rs. 1.5 lakhs under Section 80C. It has a lock-in period of 3 years.



Our Mutual Fund Partners



& All other AMC's (AMFI Members)



Our clients will have access to a mobile app to conveniently track and monitor their mutual fund investments.

Indian Mutual Fund Industry News

- Indian MF Avg AUM was ₹ 40.05 lakh crore in Mar '23.
- Indian MF AUM increased 5x in 10 yrs, to ₹ 39.42 trillion as of Mar '23.
- Total folios/accounts in Indian MFs as of Mar '23 were 14.57 crore.
- Indian fund CAGR since inception
 - Large Cap Fund AUM grew at 13.07%
 - Mid Cap Fund AUM grew at 16.01%
 - Small Cap Fund AUM grew at 16.85%
- The total SIP Book as on March 2023 was ₹ 14,276 crore
- No. of New SIPs registered in March 2023 was 21.65 Lakhs



Source: AMFI India

Equity funds performance (CAGR) over 3, 5 & 10 years.

Data as on 21 April 2023

**Past performance is not indicative of future results*

Category	3 Years	5 Years	10 Years
Equity: Large Cap	24.09	10.44	12.54
Equity: Large & MidCap	26.68	9.98	15.33
Equity: Flexi Cap	24.03	9.78	13.87
Equity: Mid Cap	31.44	10.65	17.97
Equity: Small Cap	39.45	11.77	19.8
Equity: Value Oriented	29.53	10.64	15.32

! Mutual Fund investments are subject to market risks, read all scheme related documents carefully.

II. Insurance

We offer insurance services in Term Life, Medical, Vehicle, and other types of general insurance to help protect our clients against unforeseen risks and financial losses.



Term Life Insurance

Term insurance provides coverage for a set period, pays death benefit to nominee if holder passes away within that term.



Health Insurance

Health insurance provides financial protection against the cost of medical treatment and hospitalization.



Vehicle Insurance

Vehicle insurance provides financial protection against damage of a vehicle & covers repair costs.

General insurance for non-life assets such as home, travel, and liability, protecting against losses or damages from unexpected events.

INSURANCE PARTNERS:



III. Corporate Deposits

Corporate deposits are a great investment option for those looking for higher returns than traditional bank fixed deposits. These fixed deposits are offered by reputable non-banking financial companies and corporate entities. While they may carry a higher risk, they offer attractive interest rates and are a smart choice for investors seeking higher yields.

PARTNERED WITH



IV. National Pension System (NPS)

The National Pension System is a government-sponsored pension scheme in India that is based on defined contributions. It offers investment flexibility, tax benefits, and is a popular option for retirement planning.

Our Team



Harshada Nayak



Stalin Mendes

Tap on our contact details or social media icons to reach us directly from your phone.



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