

Fund Comparison Helper

Banking, Finance & Fintech

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This guide explains what the tool produces, how to use the output, and what to watch for. The actual output (draft/report) is generated on the tool page.

Background

Builds a fund comparison framework — the parameters that actually matter (returns across periods, consistency, expense ratio, risk metrics, AUM, fund manager, portfolio) and what to check on each — with a caution that past performance is not indicative and suitability comes first. Use this to compare shortlisted funds objectively. To first map a goal to the right category use the MF Recommendation Framework.

Purpose of this tool & output

Compare funds on the right parameters

How the output is used

Use the helper to compare funds on the right parameters — risk-adjusted return, cost and consistency.

Who should vet it

An investment advisor, to confirm the comparison and suitability.

Important cautions

AI-generated framework, not investment advice; use official data and consider suitability.

Companion documents

- Mutual Fund Distributor Setup
- MF Client Onboarding Kit
- MF Recommendation Framework
- Portfolio Review Report
- AMFI / SEBI Distributor Compliance
- Commission & Brokerage Tracker

This is AI-assisted guidance. Verify with a qualified professional before any binding decision. Fees, authorities and processes vary by state and change over time — confirm with your state authority.