

## IMPORTANT NEWS

- MFU India launched 'Create and Schedule Transaction (CaST) Trigger' - a facility to schedule a transaction to be executed on defined event as set in the order. This facility was launched on Aug 12, 2020
- As per the RBI - Quarterly Estimates of Households' Financial Assets and Liabilities Data, Mutual Fund constitutes 7% of the Household Financial Assets. As compared to this, Commercial Bank Deposits constitute 52.6% and Life Insurance Funds constitute 23.2 % of the total pie.
- A total of Rs 5112 cr worth more than 10.8 tonnes of Sovereign Gold Bonds (SGB) have been sold by the government in the first 4 months of FY 20-21

## Interesting fact

Indian households sit on the world's biggest private stock of gold at 25,000 tonnes, which is worth around Rs 110 lakh crore

## Advisor Corner

### 10 tips to have a productive video call with client



Video calling has become the order of the day which easily connects any number of people at the coziness of the place wherever they are. This COVID pandemic forces everyone to unanimously accept this future reality. I am sharing 10 tips here for a productive video call.

1. Like any other meeting, plan well in advance and prepare what you are going to present.
2. For group meetings, your PPT will be very good to have more control than simply giving Gyan.
3. If you want you can even record the call, which can be shared as a link and stored for future references.
4. Better not to use the FREE service since it has limited features and time restriction, which might compress the flow of presentation.
5. Video call helps to connect people across the border, creating possibilities to bring in world class talent to share their expertise.
6. There is no time stipulation, can be as small as 10 minutes and can be done in any time zones at the availability of the participants.
7. Screen share is the best feature which helps in having clear & easy discussions.
8. Virtual background facility helps to have a better atmosphere rather than your current one.
9. Review meeting or any new client onboarding can be done through the video call.
10. In the normal meeting client is a lone participant, here there is an opportunity for the entire family to listen and pool their ideas.



**Padmanaban** - Founder, Fortune Planners

With more than a decade long dedicated career in financial advisory, his success can be calibrated by the growing confidence and the satisfaction he has cultivated in the minds of more than 1300 clients. He has completed his CFP certification in 2009 and is also a regular contributor in many well-known investment blogs.

## Investor Query:

It is not a good time to invest in GOLD, for the simple reason- GOLD has rallied when the stock market was falling and since the onset of lock-down on 23/3/20, GOLD has rallied less compared to any category of equity mutual funds.

## Advisor Reply

Why GOLD comes to spotlight for the simple reason it is rising from the FALL. For the last 7 years between 2012 to 2019, hardly it delivered any returns in the international market and only meagre return in ETF/Gold Funds or physical GOLD.

Now, we are gradually getting back to normalcy, it is only a question of time if this safe haven might continue to be attractive or not. Moreover, unlike other assets, GOLD has sentimental value, which is its savior aspect. Though at some point of time it has nearly delivered 50% return but hardly anyone intended to sell it.

In case if someone is very particular about not investing in equity MF, one can consider investing in pharma funds. Pharma is also rising up from the low and will perform incredibly well as everyone has become hyper-conscious about their health & hygiene.

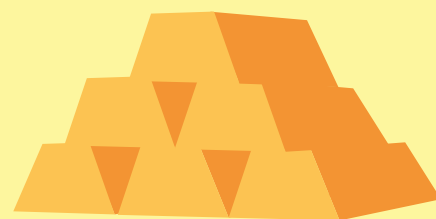
In spite of these thought sharing, if one's mind seeks only gold, it's better to invest in GOLD Funds or GOLD ETF if you have demat account so that you will have less emotion and might sell if you get some good returns which might be a rarity

**COMING SOON IN**



## VIDEO KYC

- 100% paperless KYC
- As per latest SEBI Norms



## GOLD INVESTMENT

- Invest in gold with 999.9 purity
- Purchase and Withdraw online