



BULLION BASKET- IS IT A GOOD INVESTMENT???

10th November 2023

FACT SHEET

Gold & Silver Basket

Basket Name	Gold & Silver Basket
Category	Basket
Benchmark Index	MCX iCOMEX Bullion
Status	Active
Review Frequency	Quarterly
Launch date	12-Nov-23
Rational	Investments in Gold & Silver as an Asset Class of Precious metals
Risk Factor	Medium
Investment Period	Long Term

It is advisable to invest Rs 5,000 in Basket Investments ,as it makes it easier to rebalance the constituent ETFs based on the market dynamics until full exit.

Nippon Gold Bees ETF 60% Weight
 Nippon Silver Bees ETF 40% Weight

Description

Volatility Comparison
 - Gold Volatility: Gold is known for its relative stability, with lower volatility compared to silver. Its value is often driven by its status as a safe-haven asset, inflation hedge, and central bank policies.
 - Silver Volatility: Silver, on the other hand, is more volatile due to its dual role as a precious metal and industrial commodity. Its price is influenced by industrial demand, currency movements, and economic trends

hence we advocate to have a 60% weight to GOLD and 40% weight to SILVER

Disclaimers: 1. Profit & Loss displayed under 'My Investments' in executed thematic portfolios is basis traded Buy & Sell price and without associated costs i.e. brokerage & levies. 2. In case where a basket constituent scrip is not sold through basket 'Exit' mechanism, such scrip with continue to appear in 'My Investments' along with its associated gain/loss.

ID	Company Name	Order Type	Equal Weight (%)
1	GOLDBEES-EQ (NSE)	BUY	60
2	SILVERBEES-EQ (NSE)	BUY	40

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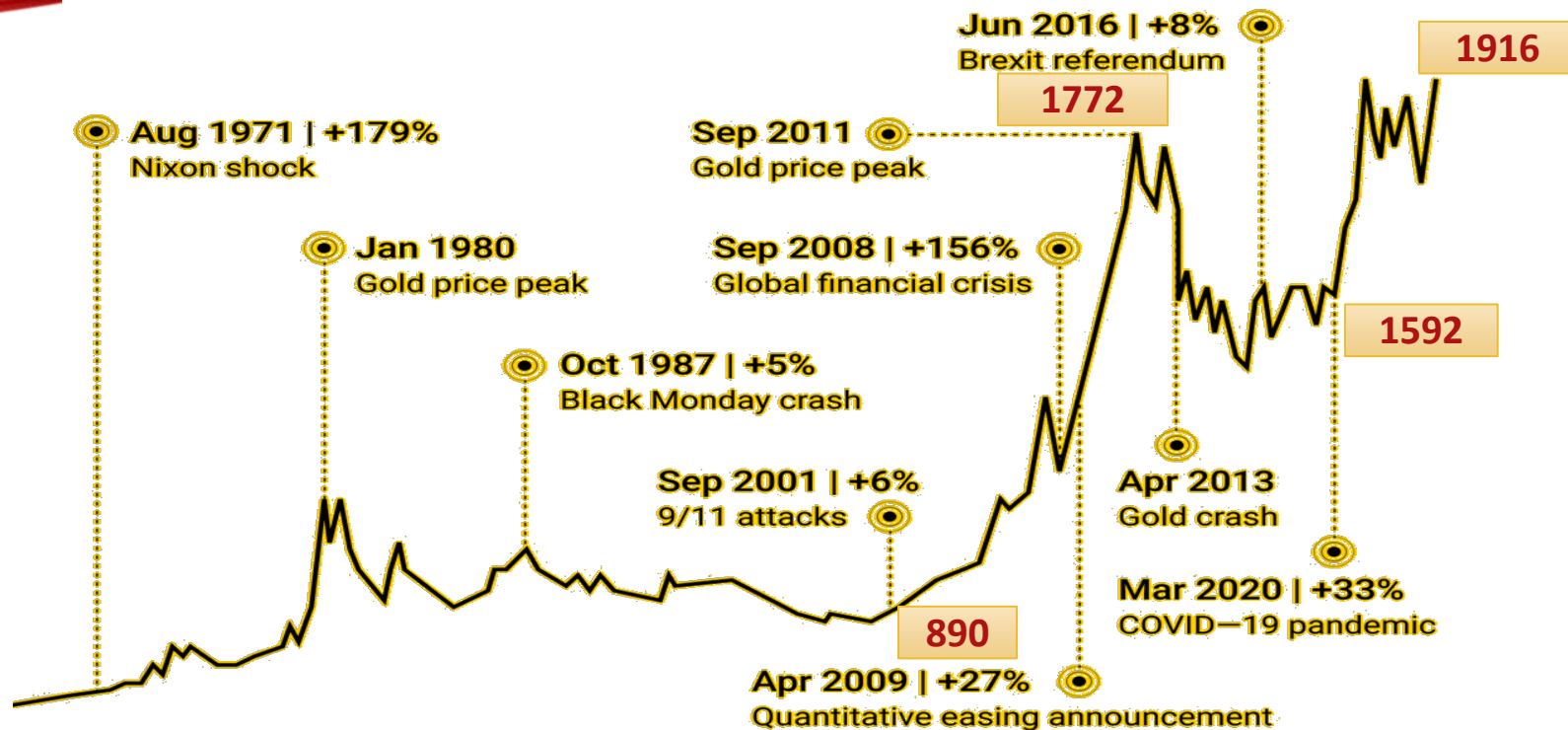
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INDEX

Sr.	Topic
1	<u>Historical Gold Price</u>
2	<u>Gold – Long Term Return</u>
3	<u>Gold – Local Currency Hedging</u>
4	<u>Gold – Enhancing a Portfolio in Long Term</u>
5	<u>Historical Silver Price</u>
6	<u>Silver- Long Term Return</u>
7	<u>Why Silver??</u>
8	<u>Usage of Silver</u>
9	<u>Silver Demand/Supply Trend</u>
10	<u>Investment Instrument in Gold/Silver</u>

HISTORICAL GOLD PRICE

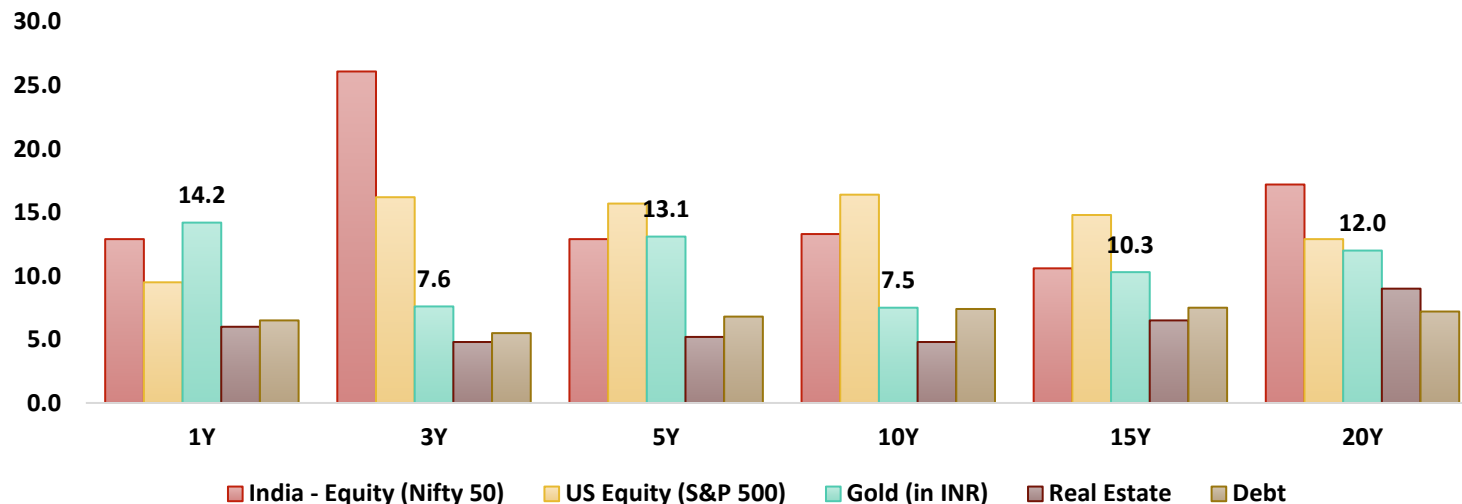
(US\$/TROY OUNCE)



Source: [link](#)

GOLD RETURNS

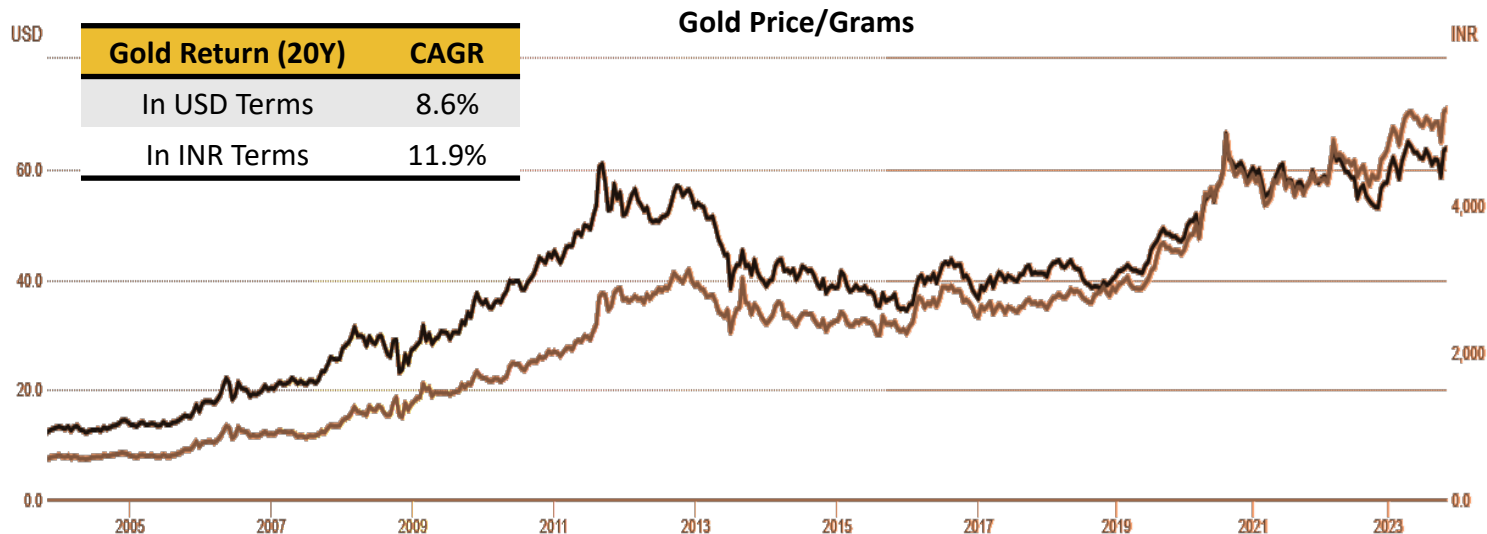
Compound Annualised Returns (%)



Source: FundsIndia Wealth Conversation Report June 2023. Returns as on May 31, 2023.

Gold has outperformed all asset classes in last one year with 14.2% returns

LOCAL CURRENCY HEDGING



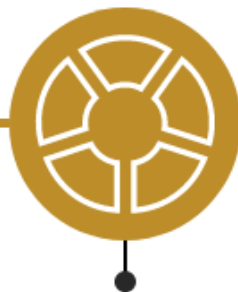
Source: <https://www.gold.org/goldhub/data/gold-prices>

Keeping gold in portfolio can help you to minimize losses and optimize returns.

GOLD CAN ENHANCE A PORTFOLIO IN THREE KEY WAYS



Returns



Diversification



Liquidity

Benefits from diverse sources of demand

- Investment Asset
- Reserve Asset
- Gold Jewelry

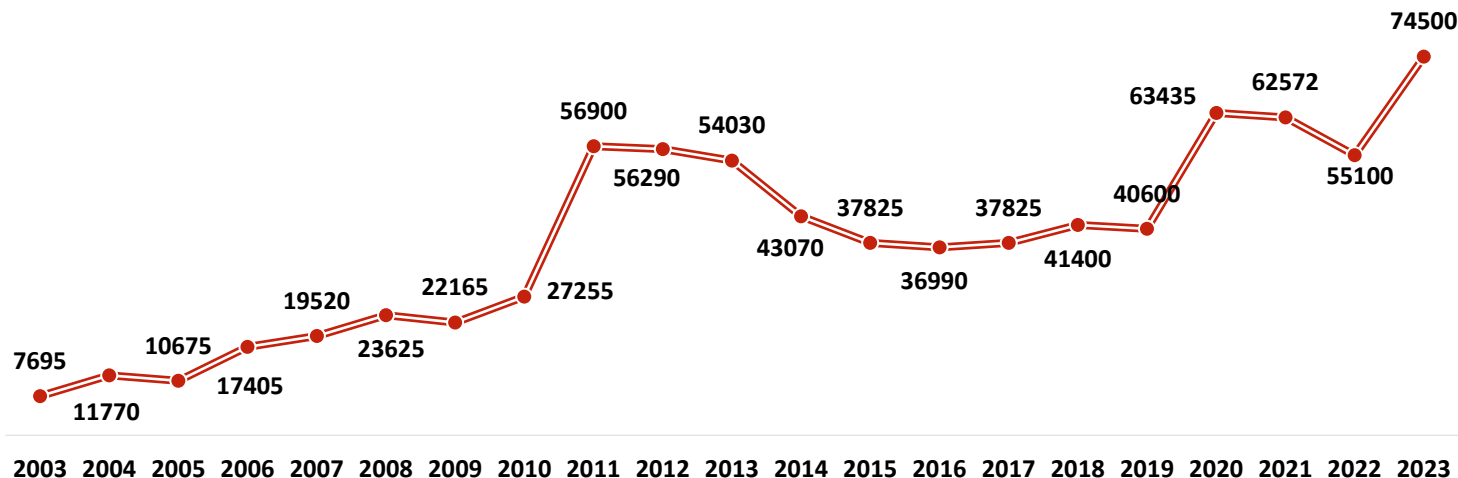
HISTORICAL SILVER PRICE



- Peak in 2011
- In a long consolidation phase

SILVER RETURN

SILVER PRICES (₹/KG)



20Y CAGR: 12%



WHY SILVER?

Good hedge against dollar

Support from its growing use in industrial settings

New Supply is falling and world demand is growing

- **Safeguards the investment during economic slowdown**
- **Currently in a consolidation mode**



USAGE OF SILVER

**Solar and Wind Power
(Photovoltaic solar panel)**

**Electric Vehicles
(EV batteries)**

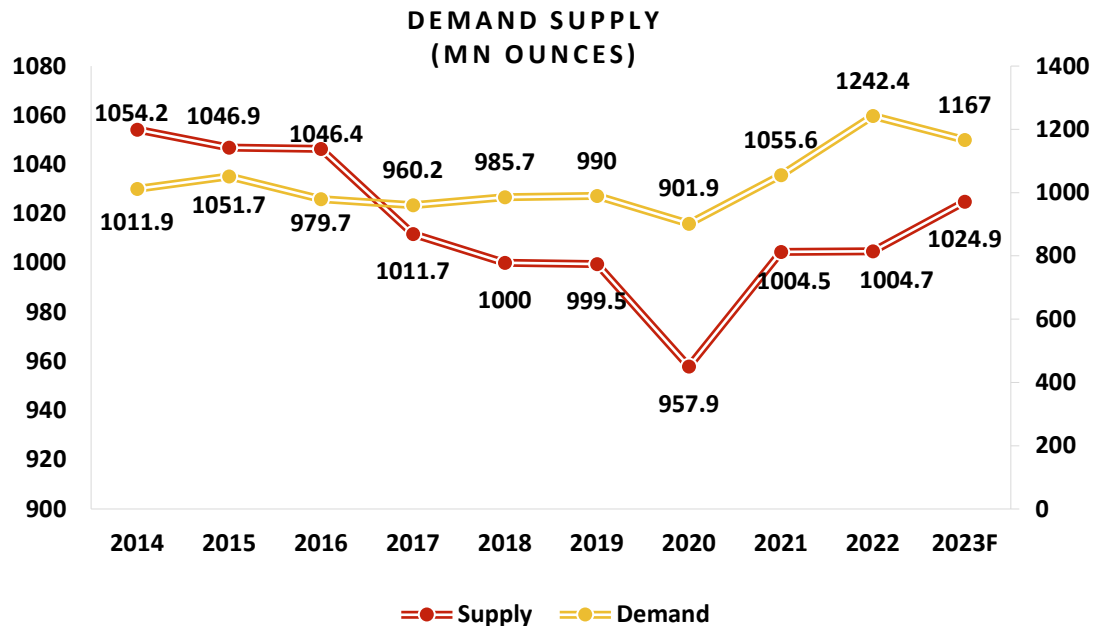
**Photographic silver use
(Photography, graphic arts,
radiography etc.)**

**Medicine's growing silver use
(Antibacterial properties)**

New demand driver:

- **Advances in technology and changes in consumer behavior.**

SILVER SUPPLY/DEMAND TRENDS



Key Triggers to support Silver

- Continuous demand/supply gap
- Growing industrial demand
- Weak \$ going ahead
- Possibilities of accommodative policy measures from Central banks

Source: <https://www.silverinstitute.org/silver-supply-demand/>

INVESTMENT INSTRUMENTS



**Purchase Physical Assets
(Bars/Coins/Jewellery)**

***Preferable Options are Gold Bonds and
Gold/Silver ETFs (W2W's Bullion Basket)***



**Invest in Exchange-Traded Funds
(ETFs)/ Gold Bonds**

- Liquidity (tradable in the stock exchange)
- Low transaction cost
- Transparent and real time gold prices



 **Antara**
Website

 **app**

 **Purse**
app

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THANK YOU!