

17th MUTUAL FUND SUMMIT

“Capitalizing on India’s Economic Ascent for Viksit Bharat”

Friday, 3rd July 2026 – New Delhi

Keynote Speaker



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Securities and Exchange Board of India

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In today's volatile market environment, mutual funds are looked upon as a transparent and low cost investment vehicle, which attracts a fair share of investor attention promoting the growth of the industry. The Indian mutual fund industry is one of the fastest growing and most competitive segments of the financial sector. The robust market performance over the past few months helped investors renew faith in stock market.

As of April 1, 2026, the industry has transitioned into a new regulatory regime that mandates absolute cost transparency and goal-based precision. With an industry AUM of ₹83.43 Lakh Crore (as of Q1 2026) and monthly SIP flows stabilizing near the ₹30,000 Crore mark, the focus is no longer just on growth, but on the quality of investor outcomes. This summit serves as the primary Summit for leaders to navigate the "Unbundled" era and the shift from product selling to life-cycle management.

There were significant inflows into equity funds, sector-based funds and gold ETF schemes indicating a bullish trajectory; however, debt funds recorded a marked reduction. The inflow patterns reveal a clear shift towards equity and sector-specific investments, while debt funds saw a significant decline. This suggests a growing investor appetite for higher returns and a strategic focus on diversified and thematic investments. The resurgence of interest in GOLD ETFs also indicates a cautious approach amidst global economic uncertainties.

There is need to encourage small investors to either invest through Mutual Fund mechanisms or take investment decisions only after getting adequate information about risks and rewards. As the industry sensitizes itself to the changing regulatory landscape, business strategies are gearing to respond to these developments. Amidst this changing business and regulatory environment, Asset Management Companies and all service providers, including distributors, have to re-examine their business models and embrace the changing business landscapes.

The objective of the program is to encourage a greater number of people to participate in the corporate economy through various investment instruments. The deliberations will focus on reaching out to investors and to familiarize them with the basic fundamentals of investment and risk management and their rights and responsibilities, and to build confidence among them to invest in government as well as corporate securities, so that not only the corporate markets grow but so does the Indian economy.

Therefore, in order to discuss these aspects further in mutual fund industry and to discuss best investment practices and investors' protection, ASSOCHAM is organizing 17th Mutual Fund Summit at 9:30 a.m. on July 3, 2026 in New Delhi. There will be a large participation by the stakeholders including the Government officials, Asset Management Companies, Banks and Financial Institutions, Corporate houses, Tax consultants, Prime Brokers, FIIs, HNIs and Investors to name a few.





KEY ISSUES FOR DISCUSSION

- ⊙ An Outlook on Mutual Fund Industry: Trends and Predictions
- ⊙ Market Volatility Management: Understanding Risks Associated with Mutual Fund Investment.
- ⊙ Understanding Market Dynamics and Regulatory Updates for sustaining long-term growth.
- ⊙ Technological Integration of Distribution & Delivery Channels.
- ⊙ The Investment pattern of HNIs, FIIs
- ⊙ Salient features/ traits to becoming a smart investor
- ⊙ Role of Financial Planning – Awareness, Product Customization & Distribution
- ⊙ Innovations in Mutual Fund Industry and Investor Education
- ⊙ Protecting & promoting interest of Investors.
- ⊙ Distribution challenges, Strategies and Regulations in Indian Mutual Fund Industry
- ⊙ Mutual Fund Investors Perceptions and Preferences
- ⊙ Mutual Funds: Trading practices and abuses that harm investors.
- ⊙ Challenges of Mutual Fund Industry: Reaching out to retail investors
- ⊙ Internal and External Factors in Mutual Funds Performance.
- ⊙ International Diversification and Distribution.
- ⊙ Portfolio Allocation, Risk and Performance Evaluation of Mutual Funds.
- ⊙ Global Mutual Fund Investing: Using Funds to Investment decision.
- ⊙ Evolving Principles of Fund Governance
- ⊙ Marketing Funds through Distribution Channels
- ⊙ Competition for Mutual Funds from New Collective Investment Vehicle
- ⊙ Role of an Intermediary in Mutual Fund Sales
- ⊙ Asset Allocation – The model that suits the Investor
- ⊙ Mutual Fund – Basics Structure, Standards & Disclosures, Portfolio Diversification
- ⊙ Sustaining Investor Confidence in Mutual Funds.
- ⊙ Mutual fund performance and fund ratings

PARTICIPANTS PROFILE

- ⊙ Asset Management Companies
- ⊙ Indian and Multinational Banks
- ⊙ Domestic & Foreign Financial Institutions
- ⊙ Foreign Institutional Investors
- ⊙ Large & Medium Corporate Houses
- ⊙ Software Solution Companies
- ⊙ BFSI Consultants
- ⊙ Corporate Investors
- ⊙ High Net worth Individuals
- ⊙ Asset Managers / Portfolio Managers
- ⊙ Lead Managers
- ⊙ CFO's, CEO's & CIO's
- ⊙ Compliance Officers
- ⊙ Investment Advisors
- ⊙ Corporate Trustees
- ⊙ Distributors
- ⊙ Government Officials and regulators
- ⊙ Fund Managers
- ⊙ Investment/Research Analysts
- ⊙ Financial Planners and Independent Consultants
- ⊙ Insurance and other service providers
- ⊙ Tax and Accounting Executives
- ⊙ Prime Brokers

INVITED EMINENT SPEAKERS FROM

- ⊙ SEBI
- ⊙ Ministry of Finance
- ⊙ Ministry of Corporate Affairs
- ⊙ Reserve Bank of India (RBI)
- ⊙ Association of Mutual Funds in India (AMFI)
- ⊙ Mutual Fund Houses
- ⊙ Indian and Multinational Banks
- ⊙ Advisors and Fund Managers
- ⊙ Distribution Houses & Intermediaries
- ⊙ Research Organizations
- ⊙ Financial Institutions
- ⊙ Foreign Institutional Investors
- ⊙ Large and Medium Corporate Houses
- ⊙ Consulting and Rating Agencies

SPONSORSHIP OPPORTUNITIES

The Summit provides an excellent opportunity for organizations/companies to promote their product & services to the focused audience besides networking during tea/coffee and lunch intervals. The sponsorship details are as under:

Summit Partner – Rs. 15 Lakh (Exclusive)

- Status of 'Summit Partner' and the Partner's name and logo will be prominently displayed at the Summit venue.
- Speaker Slot to a company representative in Inaugural session & Technical sessions.
- Branding of Logo in ASSOCHAM event Webpage.
- Company representative Pre event Quote at social media
- Company representative Post event Quote at social media.
- Branding of company Logo & speaker's photograph in the newspaper advertisement.
- Branding of company Logo in Thank you panel at the Summit Venue.
- Branding of company Logo in ASSOCHAM's Social Media Platform.
- Complimentary Exhibition space (2x2 sqm.) non fabricated.
- Incorporation of 2 company standees in the venue.
- Logo branding in event brochure.
- Logo branding on the event Mailers.
- Corporate Video Play during the Tea and Lunch Break (3 min only).
- Insertion of company publicity material into the documentation pack.
- 15 Complimentary Passes to attend the Summit.
- Priority Seating arrangements for the delegates nominated by company.

Principal Partners – Rs. 10 Lakh

- Status of 'Principal Partner' and the Sponsor's name and logo will be prominently displayed at the main backdrop of the Summit.
- Speaking opportunity as Panellist in Inaugural session & anyone (1) Panel Sessions.
- Branding of company Logo & speaker's photograph in the newspaper advertisement.
- Logo branding in Thank you panel at the Summit Venue.
- Logo branding in event brochure.
- Company representative Pre event Quote at social media.
- Corporate Video Play at Summit during the Tea/Coffee Break (2 min only).
- Logo branding on the event Mailers.
- Logo on the ASSOCHAM event Webpage.
- Branding of company Logo in ASSOCHAM's Social Media Platform.
- Incorporation of 2 company standees in the venue.
- Insertion of Company's brochure into the documentation pack.
- 10 Complimentary Passes to attend the Summit.
- Priority Seating arrangements for the delegates nominated by company.

Technology / Banking / Innovation Partners – Rs. 7 Lakh

- Branding of company logo at the main backdrop at the Summit Venue.
- Branding of company Logo in newspaper advertisement.
- Logo branding in Thank you panel at the Summit Venue.
- Logo branding in event brochure.
- Speaking opportunity as Panellist in any One (1) Panel Session.
- Corporate Video Play at conference during the Tea/Coffee Break (2 min only).
- Incorporation of company banner in digital standees.
- Logo branding on the event Mailers.
- Logo on the ASSOCHAM event Webpage.
- Branding in Social Media Platform.
- Insertion of Company's brochure into the documentation pack.
- 7 Complimentary Passes to attend the Summit.

Co-Partner – Rs. 5 Lakh

- Branding of company logo at the main backdrop at the Summit Venue.
- Branding of company Logo in newspaper advertisement.
- Logo branding in event brochure.
- Logo branding in Thank you panel at the Summit Venue.
- Corporate Video Play at conference during the Tea/Coffee Break (1 min only).
- Logo on the ASSOCHAM event Webpage.
- Incorporation of company banner in digital standees
- Branding in Social Media Platform.
- Insertion of Company's brochure into the documentation pack.
- 5 Complimentary Passes to attend the Summit.

Lanyard & Delegate Kit Partner – Rs. 5 Lakh (Exclusive - Each One)

- Branding of company logo at the main backdrop at the Summit Venue.
- Branding of company Logo in newspaper advertisement.
- Logo branding on Lanyard.
- Logo branding in event brochure.
- Logo branding in Thank you panel at the Summit Venue.
- Logo on the ASSOCHAM event Webpage.
- Branding in Social Media Platform.
- 5 Complimentary Passes to attend the Summit.

Associate Partner – Rs. 3 Lakh

- Branding of company logo at the main backdrop at the Summit Venue.
- Branding of company Logo in newspaper advertisement.
- Logo branding in event brochure.
- Logo branding in Thank you panel at the Summit Venue.
- Incorporation of company banner in digital standees.
- Logo on the ASSOCHAM event Webpage.
- 3 Complimentary Passes to attend the Summit .

Note: It is imperative that Partner/Sponsorship details and Advertisement material are received by us latest by **June 23, 2026**. The support options are strictly on first cum first served basis.

Participation Fee: Rs. 3,000/- (Including GST)

FOR FURTHER DETAILS PLEASE CONTACT:

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