

# Axis Nifty Next 50 Index Fund

Mar-2026

# Axis Nifty Next 50 Index Fund

About the fund



# Axis Nifty Next 50 Index Fund

## Scheme Details



### Type of Scheme

An Open Ended Index Fund tracking the Nifty Next 50 Index



### Minimum Investment

₹100 and ₹1 thereafter

### Entry Load

NA



### Exit Load

Nil



### AUM (In Cr) (As of 31-Mar-26)

₹ 397.43 \*



### Benchmark

Nifty Next 50 Index TRI



### Inception Date

28-Jan-2022



### Investment Objective

To provide returns before expenses that closely corresponds to the total returns of the NIFTY NEXT 50 subject to tracking errors. There is no assurance that the investment objective of the Scheme will be achieved.



### Fund Manager

Mr. Nandik Malik and Mr. Rohit Gautam



### Total Expense Ratio (As of 31-Mar-26)

Regular - 1.01%

Direct - 0.15%



### Tracking Error (As of 31-Mar-26)\*

Regular - 0.09%


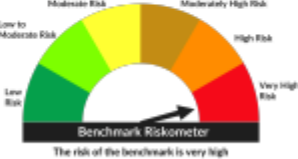
Direct - 0.08%

\*Annualized tracking error is calculated based on daily rolling returns for the last 12 months. For complete details, read Scheme Information Document (SID);\* <https://www.axismf.com/cms/sites/default/files/Statutory/Q4.pdf>

# Axis Nifty Next 50 Index Fund

(An Open-Ended Index Fund tracking the NIFTYNEXT 50 Index

Benchmark: NIFTY NEXT 50 Index TRI

Product Labelling	Product Riskometer	Benchmark Riskometer
<p>This product is suitable for investors who are seeking*</p> <ul style="list-style-type: none"><li>• Long term wealth creation solution.</li><li>• An index fund that seeks to track returns by investing in a basket of Nifty Next 50 Index stocks and aims to achieve returns of the stated index, subject to tracking error.</li></ul> <p>*Investors should consult their financial advisers if in doubt about whether the product is suitable for them.</p>	 <p>Scheme Riskometer The risk of the scheme is very high</p>	 <p>Benchmark Riskometer The risk of the benchmark is very high</p>

# Scheme Performance

## PERFORMANCE (AS ON 31ST MARCH, 2026)

### Axis Nifty Next 50 Index Fund

	1 Year		3 Years		5 Years		Since Inception		Date of Inception
	CAGR(%)	Current Value of Investment of ₹10,000/-	CAGR(%)	Current Value of Investment of ₹10,000/-	CAGR(%)	Current Value of Investment of ₹10,000/-	CAGR(%)	Current Value of Investment of ₹10,000/-	
Axis Nifty Next 50 Index Fund - Regular - Growth	-4.33%	9565	16.54%	15827	NA	NA	9.38%	14536	28-Jan-22
Nifty Next 50 Index TRI (Benchmark)	-3.32%	9667	17.79%	16344	NA	NA	10.89%	15387	
Nifty 50 TRI (Additional Benchmark)	-3.97%	9601	10.03%	13320	NA	NA	7.86%	13707	
Axis Nifty Next 50 Index Fund - Direct - Growth	-3.51%	9647	17.36%	16165	NA	NA	10.13%	14951	28-Jan-22
Nifty Next 50 Index TRI (Benchmark)	-3.32%	9667	17.79%	16344	NA	NA	10.89%	15387	
Nifty 50 TRI (Additional Benchmark)	-3.97%	9601	10.03%	13320	NA	NA	7.86%	13707	

Past performance may or may not be sustained in future. Different plans have different expense structure. Nandik Malik is managing the scheme since 6th March 2026 and he manages 22 schemes of Axis Mutual Fund & Rohit Gautam is managing the scheme since 6th March 2026 and he manages 20 schemes of Axis Mutual Fund . Please refer to [https://www.axismf.com/cms/sites/default/files/Statutory/ALL\\_Annexure\\_Mar.pdf](https://www.axismf.com/cms/sites/default/files/Statutory/ALL_Annexure_Mar.pdf) for performance of all schemes managed by the fund manager. Returns greater than 1 year period are compounded annualised (CAGR). Face Value per unit : ₹10.

# Nifty Next 50 Index

Deep Dive



# Axis Nifty Next 50 Index Fund

## *Exposure to India future leaders*

Axis Nifty Next 50 Index fund aims to offer exposure to bluechip companies of tomorrow forming part of Nifty 100 Index after excluding Nifty 50 companies.

### Key attributes -

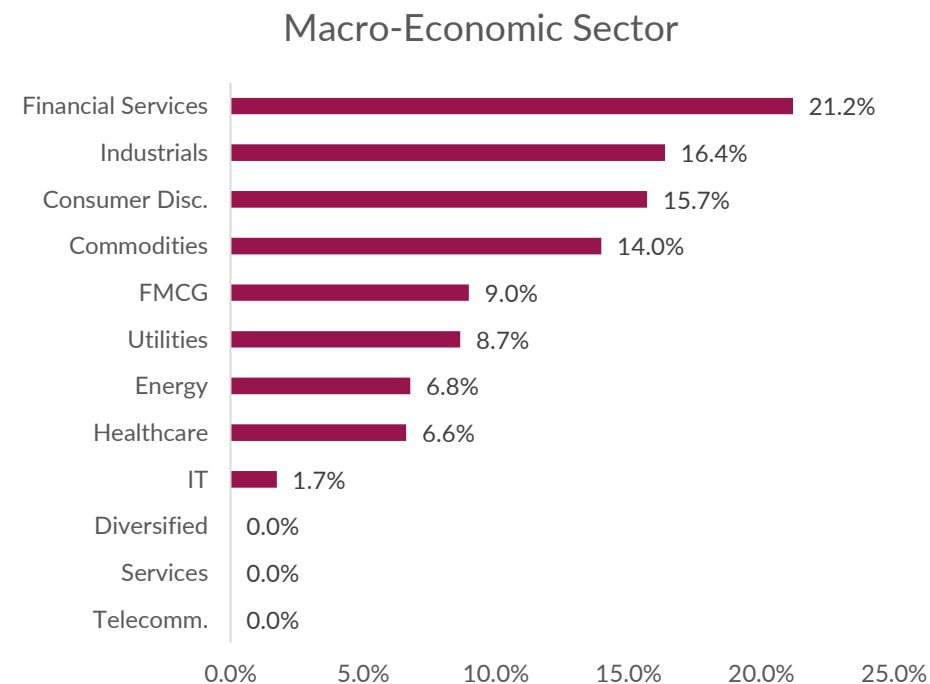
- **Exposure to Future Market Leaders** , many constituents eventually graduate to the flagship index of Nifty 50.
- Nifty Next 50 Index constituents are typically in **their expansion phase of their company lifecycle**.
- Constituents are weighted based on free float market cap and rebalanced semi-annually.

	Time Period	Nifty Next 50 TRI	Nifty 50 TRI
CAGR	3 Year	17.8%	10.0%
	5 Year	13.0%	10.0%
	10 Year	13.6%	12.5%
	15 Year	13.1%	10.7%
Volatility	15 Year	18.0%	16.4%

# Index Composition : Nifty Next 50

## Top 10 Constituents

Company Name	Weight	Macro Economic Sector
VEDANTA LTD.	5.2%	Commodities
TATA MOTORS LTD.	3.9%	Industrials
TVS MOTOR COMPANY LTD.	3.7%	Consumer Discretionary
DIVI'S LABORATORIES LTD.	3.5%	Healthcare
HINDUSTAN AERONAUTICS LTD.	3.1%	Industrials
BRITANNIA INDUSTRIES LTD.	3.0%	Fast Moving Consumer Goods
TATA POWER CO. LTD.	3.0%	Utilities
ADANI POWER LTD.	2.9%	Utilities
CUMMINS INDIA LTD.	2.8%	Industrials
AVENUE SUPERMARTS LTD.	2.7%	Consumer Discretionary
<b>Top 10 Total Weight</b>	<b>33.8%</b>	



# Index Rolling Return : Nifty Next 50

Data Label	1 Year Rolling Returns		3 Year Rolling Returns		5 Year Rolling Returns	
	Nifty 50 - TRI	Nifty Next 50- TRI	Nifty 50 - TRI	Nifty Next 50- TRI	Nifty 50 - TRI	Nifty Next 50- TRI
Average	15.2%	19.7%	12.2%	14.7%	12.5%	14.9%
Median	12.9%	12.6%	12.6%	15.6%	13.3%	14.6%
Min	-56.4%	-67.2%	-5.0%	-15.0%	-1.6%	-0.3%
Max	105.7%	196.8%	33.2%	44.4%	27.1%	31.5%

CAGR Ranges	% of total observations					
Negative	17.5%	25.9%	1.8%	7.6%	0.1%	0.1%
0% to 10%	23.5%	19.9%	31.3%	19.4%	27.6%	24.1%
10% to 15%	15.2%	7.3%	34.5%	19.9%	41.8%	28.2%
15% to 20%	10.3%	6.4%	24.4%	24.4%	27.3%	22.4%
Above 20%	33.5%	40.5%	8.0%	28.7%	3.2%	25.2%
<b>Double Digit</b>	<b>59.0%</b>	<b>54.1%</b>	<b>73.4%</b>	<b>66.9%</b>	<b>72.3%</b>	<b>75.9%</b>

Source: Nifty Indices, Data 30-Sep-2005 to 31-Mar-2026. Past performance may or may not be sustained in the future. The above information should not be construed as promise, guarantee or forecast of returns. Table / Charts mentioned above are used to explain the concept and is for illustration purpose only. The Stocks mentioned herein are for general assesment purpose only and not a complete disclosure of every material fact. It should not be construed as investment advice to any party.  
<https://niftyindices.com/indices/equity/broad-based-indices/nifty-next-50>

# Index SIP : Returns

**SIP tends to offer stability to investment growth**

<b>Nifty Next 50 Index</b>	<b>1 Year</b>	<b>3 Year</b>	<b>5 Year</b>	<b>10 Year</b>
<b>XIRR (Returns)</b>	-17.8%	3.0%	8.8%	11.9%
<b>Amount Invested</b>	1,20,000	3,60,000	6,00,000	1,200,000
<b>Market Value</b>	1,08,262	3,76,855	7,48,511	22,25,934

Source: Nifty Indices, Data as of 31-Mar-2026. Past performance may or may not be sustained in the future. The above information should not be construed as promise, guarantee or forecast of returns. Table / Charts mentioned above are used to explain the concept and is for illustration purpose only. The Stocks mentioned herein are for general assesment purpose only and not a complete disclosure of every material fact. It should not be construed as investment advice to any party.

<https://niftyindices.com/indices/equity/broad-based-indices/nifty-next-50>

# Why Axis AMC



# Why AXIS AMC

- Axis AMC is one of the **prominent asset management companies** with an overall AUM exceeding INR 3,00,000 crore and over 1 crore active investor accounts, enjoying strong brand recognition and investor
- A committed and skilled **leadership team concentrating on Passive Funds.**
- Continuous research accompanied by **valuable data insights** tailored to monitor and advise on established & emerging investment ideas
- A **diverse selection of passive funds**, featuring a total of 37 options across equity, debt, and commodities
- Research initiatives spearheaded by professional with extensive experience of over 15 years working domestic and international index providers, NSE, BSE, and S&P Dow Jones Indices.

# Annexure



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