

Mutual Funds

TheCasesolutions.com


Questions

Benefits of Mutual Funds



- When you purchase a fund, you also get an experienced portfolio manager to do research and monitor your securities
- The minimum investment price can be from \$250-\$500 but is usually around \$2,500
- Where To Get a Mutual Fund:
- You can purchase or sell mutual funds through a broker, bank, or online based on the net asset value

Cost of Mutual Funds



Mutual Fund Fees

- No Load**
- Frontend Load**
- Backend Load**

No Load Funds:

- Funds sold directly to the public
- They do not charge a sales commission

Load Funds: Sold through brokers which charge a commission

Front-End Loads:

- Commission is paid when you purchase a share
- The price is deducted from your initial investment (if you have a \$1000 investment, and the load is 3%, you will only be investing \$970)

Back-End Loads:

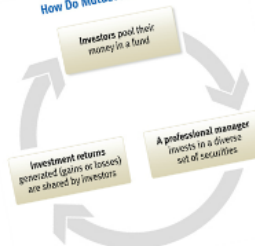
- There are charges that will be deducted from your investment when you sell the funds
- This is done to discourage people from frequently changing funds

The Basics



The Basics

How Do Mutual Funds Work?



Investors pay their money in a fund

A professional manager invests in a diverse set of securities

Investment returns generated (gains or losses) are shared by investors

Other Fees



- The Basics of Mutual Funds
- The Benefits of Mutual Funds
- The Cost of Mutual Funds

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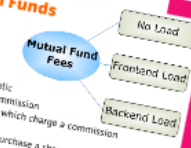
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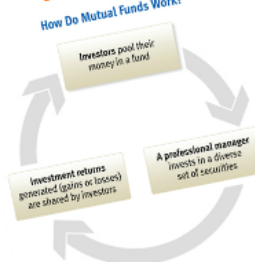
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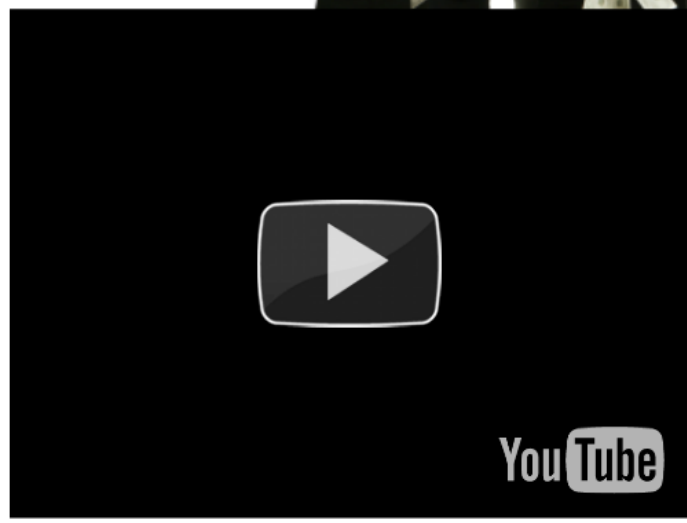


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