

SIP Proposal For 1LakhSip25Yrs

Monthly SIP Amount	₹ 1,00,000
SIP Period	25 Years
Step-Up % Every Year	10.00 %
Assumed Rate of Return	15.00 %

Total Investment

Normal SIP	Step-Up SIP
₹ 3,00,00,000	₹ 11,80,16,471

Expected Future Value

Normal SIP	Step-Up SIP
₹ 27,56,56,078	₹ 57,21,66,972

*This illustration and returns assumed are on the basis of the request made by you. These are neither indicative nor guaranteed returns. Mutual fund investments are subject to market risks. Do read all scheme-related documents carefully.
Report Date : 28/08/2024

Normal SIP Year-Wise Projected Value

1	₹ 1,00,000	₹ 12,00,000	₹ 12,95,419
2	₹ 1,00,000	₹ 12,00,000	₹ 27,85,150
3	₹ 1,00,000	₹ 12,00,000	₹ 44,98,342
4	₹ 1,00,000	₹ 12,00,000	₹ 64,68,512
5	₹ 1,00,000	₹ 12,00,000	₹ 87,34,208
6	₹ 1,00,000	₹ 12,00,000	₹ 1,13,39,757
7	₹ 1,00,000	₹ 12,00,000	₹ 1,43,36,140
8	₹ 1,00,000	₹ 12,00,000	₹ 1,77,81,980
9	₹ 1,00,000	₹ 12,00,000	₹ 2,17,44,695
10	₹ 1,00,000	₹ 12,00,000	₹ 2,63,01,819
11	₹ 1,00,000	₹ 12,00,000	₹ 3,15,42,510
12	₹ 1,00,000	₹ 12,00,000	₹ 3,75,69,305
13	₹ 1,00,000	₹ 12,00,000	₹ 4,45,00,120
14	₹ 1,00,000	₹ 12,00,000	₹ 5,24,70,557
15	₹ 1,00,000	₹ 12,00,000	₹ 6,16,36,559
16	₹ 1,00,000	₹ 12,00,000	₹ 7,21,77,462
17	₹ 1,00,000	₹ 12,00,000	₹ 8,42,99,500
18	₹ 1,00,000	₹ 12,00,000	₹ 9,82,39,844
19	₹ 1,00,000	₹ 12,00,000	₹ 11,42,71,239
20	₹ 1,00,000	₹ 12,00,000	₹ 13,27,07,344
21	₹ 1,00,000	₹ 12,00,000	₹ 15,39,08,864
22	₹ 1,00,000	₹ 12,00,000	₹ 17,82,90,613
23	₹ 1,00,000	₹ 12,00,000	₹ 20,63,29,624
24	₹ 1,00,000	₹ 12,00,000	₹ 23,85,74,486
25	₹ 1,00,000	₹ 12,00,000	₹ 27,56,56,078

*The chart is for illustration purposes only. Figures are approximate and may not be linear as shown in the chart. The returns assumed above are as per your request. These are neither indicative nor guaranteed returns.
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Step - Up SIP Year-Wise Projected Value

1	₹ 1,00,000	₹ 12,00,000	₹ 12,95,419
2	₹ 1,10,000	₹ 13,20,000	₹ 29,14,692
3	₹ 1,21,000	₹ 14,52,000	₹ 49,19,353
4	₹ 1,33,100	₹ 15,97,200	₹ 73,81,458
5	₹ 1,46,410	₹ 17,56,920	₹ 1,03,85,300
6	₹ 1,61,051	₹ 19,32,612	₹ 1,40,29,380
7	₹ 1,77,156	₹ 21,25,873	₹ 1,84,28,700
8	₹ 1,94,872	₹ 23,38,461	₹ 2,37,17,410
9	₹ 2,14,359	₹ 25,72,307	₹ 3,00,51,867
10	₹ 2,35,795	₹ 28,29,537	₹ 3,76,14,176
11	₹ 2,59,374	₹ 31,12,491	₹ 4,66,16,286
12	₹ 2,85,312	₹ 34,23,740	₹ 5,73,04,710
13	₹ 3,13,843	₹ 37,66,114	₹ 6,99,65,995
14	₹ 3,45,227	₹ 41,42,725	₹ 8,49,33,031
15	₹ 3,79,750	₹ 45,56,998	₹ 10,25,92,337
16	₹ 4,17,725	₹ 50,12,698	₹ 12,33,92,473
17	₹ 4,59,497	₹ 55,13,968	₹ 14,78,53,759
18	₹ 5,05,447	₹ 60,65,364	₹ 17,65,79,478
19	₹ 5,55,992	₹ 66,71,901	₹ 21,02,68,822
20	₹ 6,11,591	₹ 73,39,091	₹ 24,97,31,809
21	₹ 6,72,750	₹ 80,73,000	₹ 29,59,06,510
22	₹ 7,40,025	₹ 88,80,300	₹ 34,98,78,909
23	₹ 8,14,027	₹ 97,68,330	₹ 41,29,05,811
24	₹ 8,95,430	₹ 1,07,45,163	₹ 48,64,41,255
25	₹ 9,84,973	₹ 1,18,19,679	₹ 57,21,66,972

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SUGGESTED SCHEMES FOR INVESTMENT

EQUITY

S. No.	Scheme Name	Past Performance (%)				
		1 Yr	3 Yr	5 Yr	10 Yr	Since Inception
1	Tata Ethical Fund-Reg(G) <i>Equity - Thematic Fund - Other</i>	36.92%	17.19%	23.51%	14.74%	16.48%
2	Taurus Ethical Fund-Reg(G) <i>Equity - Thematic Fund - Other</i>	46.65%	19.30%	23.23%	14.69%	18.60%

*Returns are for lumpsum investments. Returns above 1 yr are annualized. Returns for 1 yr and less are absolute. Performance data is as per the last published/available NAV (Source : Accord Fintech). Any assumption of returns shown in the calculation above should not be construed as indicative/expected returns from any specific mutual fund scheme. Contact us for scheme specific risk. Mutual funds investments are subject to market risk. Please read the offer documents carefully before investing.

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