

## SIP Proposal For 10kSip25Yrs

<b>Monthly SIP Amount</b>	₹ 10,000
<b>SIP Period</b>	25 Years
<b>Step-Up % Every Year</b>	10.00 %
<b>Assumed Rate of Return</b>	15.00 %

## Total Investment

<b>Normal SIP</b>	<b>Step-Up SIP</b>
₹ 30,00,000	₹ 1,18,01,647

## Expected Future Value

<b>Normal SIP</b>	<b>Step-Up SIP</b>
₹ 2,75,65,608	₹ 5,72,16,697

\*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	₹ 10,000	₹ 1,20,000	₹ 1,29,542
2	₹ 10,000	₹ 1,20,000	₹ 2,78,515
3	₹ 10,000	₹ 1,20,000	₹ 4,49,834
4	₹ 10,000	₹ 1,20,000	₹ 6,46,851
5	₹ 10,000	₹ 1,20,000	₹ 8,73,421
6	₹ 10,000	₹ 1,20,000	₹ 11,33,976
7	₹ 10,000	₹ 1,20,000	₹ 14,33,614
8	₹ 10,000	₹ 1,20,000	₹ 17,78,198
9	₹ 10,000	₹ 1,20,000	₹ 21,74,470
10	₹ 10,000	₹ 1,20,000	₹ 26,30,182
11	₹ 10,000	₹ 1,20,000	₹ 31,54,251
12	₹ 10,000	₹ 1,20,000	₹ 37,56,931
13	₹ 10,000	₹ 1,20,000	₹ 44,50,012
14	₹ 10,000	₹ 1,20,000	₹ 52,47,056
15	₹ 10,000	₹ 1,20,000	₹ 61,63,656
16	₹ 10,000	₹ 1,20,000	₹ 72,17,746
17	₹ 10,000	₹ 1,20,000	₹ 84,29,950
18	₹ 10,000	₹ 1,20,000	₹ 98,23,984
19	₹ 10,000	₹ 1,20,000	₹ 1,14,27,124
20	₹ 10,000	₹ 1,20,000	₹ 1,32,70,734
21	₹ 10,000	₹ 1,20,000	₹ 1,53,90,886
22	₹ 10,000	₹ 1,20,000	₹ 1,78,29,061
23	₹ 10,000	₹ 1,20,000	₹ 2,06,32,962
24	₹ 10,000	₹ 1,20,000	₹ 2,38,57,449
25	₹ 10,000	₹ 1,20,000	₹ 2,75,65,608

\*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	₹ 10,000	₹ 1,20,000	₹ 1,29,542
2	₹ 11,000	₹ 1,32,000	₹ 2,91,469
3	₹ 12,100	₹ 1,45,200	₹ 4,91,935
4	₹ 13,310	₹ 1,59,720	₹ 7,38,146
5	₹ 14,641	₹ 1,75,692	₹ 10,38,530
6	₹ 16,105	₹ 1,93,261	₹ 14,02,938
7	₹ 17,716	₹ 2,12,587	₹ 18,42,870
8	₹ 19,487	₹ 2,33,846	₹ 23,71,741
9	₹ 21,436	₹ 2,57,231	₹ 30,05,187
10	₹ 23,579	₹ 2,82,954	₹ 37,61,418
11	₹ 25,937	₹ 3,11,249	₹ 46,61,629
12	₹ 28,531	₹ 3,42,374	₹ 57,30,471
13	₹ 31,384	₹ 3,76,611	₹ 69,96,600
14	₹ 34,523	₹ 4,14,273	₹ 84,93,303
15	₹ 37,975	₹ 4,55,700	₹ 1,02,59,234
16	₹ 41,772	₹ 5,01,270	₹ 1,23,39,247
17	₹ 45,950	₹ 5,51,397	₹ 1,47,85,376
18	₹ 50,545	₹ 6,06,536	₹ 1,76,57,948
19	₹ 55,599	₹ 6,67,190	₹ 2,10,26,882
20	₹ 61,159	₹ 7,33,909	₹ 2,49,73,181
21	₹ 67,275	₹ 8,07,300	₹ 2,95,90,651
22	₹ 74,002	₹ 8,88,030	₹ 3,49,87,891
23	₹ 81,403	₹ 9,76,833	₹ 4,12,90,581
24	₹ 89,543	₹ 10,74,516	₹ 4,86,44,125
25	₹ 98,497	₹ 11,81,968	₹ 5,72,16,697

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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	<b>Tata Ethical Fund-Reg(G)</b> <i>Equity - Thematic Fund - Other</i>	36.92%	17.19%	23.51%	14.74%	16.48%
2	<b>Taurus Ethical Fund-Reg(G)</b> <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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