

SIP Proposal For 2LakhSip25Yrs

Monthly SIP Amount	₹ 2,00,000
SIP Period	25 Years
Step-Up % Every Year	10.00 %
Assumed Rate of Return	15.00 %

Total Investment

Normal SIP	Step-Up SIP
₹ 6,00,00,000	₹ 23,60,32,943

Expected Future Value

Normal SIP	Step-Up SIP
₹ 55,13,12,156	₹ 1,14,43,33,943

*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	₹ 2,00,000	₹ 24,00,000	₹ 25,90,838
2	₹ 2,00,000	₹ 24,00,000	₹ 55,70,301
3	₹ 2,00,000	₹ 24,00,000	₹ 89,96,684
4	₹ 2,00,000	₹ 24,00,000	₹ 1,29,37,024
5	₹ 2,00,000	₹ 24,00,000	₹ 1,74,68,415
6	₹ 2,00,000	₹ 24,00,000	₹ 2,26,79,515
7	₹ 2,00,000	₹ 24,00,000	₹ 2,86,72,280
8	₹ 2,00,000	₹ 24,00,000	₹ 3,55,63,959
9	₹ 2,00,000	₹ 24,00,000	₹ 4,34,89,391
10	₹ 2,00,000	₹ 24,00,000	₹ 5,26,03,637
11	₹ 2,00,000	₹ 24,00,000	₹ 6,30,85,020
12	₹ 2,00,000	₹ 24,00,000	₹ 7,51,38,611
13	₹ 2,00,000	₹ 24,00,000	₹ 8,90,00,240
14	₹ 2,00,000	₹ 24,00,000	₹ 10,49,41,114
15	₹ 2,00,000	₹ 24,00,000	₹ 12,32,73,119
16	₹ 2,00,000	₹ 24,00,000	₹ 14,43,54,924
17	₹ 2,00,000	₹ 24,00,000	₹ 16,85,99,000
18	₹ 2,00,000	₹ 24,00,000	₹ 19,64,79,688
19	₹ 2,00,000	₹ 24,00,000	₹ 22,85,42,479
20	₹ 2,00,000	₹ 24,00,000	₹ 26,54,14,688
21	₹ 2,00,000	₹ 24,00,000	₹ 30,78,17,729
22	₹ 2,00,000	₹ 24,00,000	₹ 35,65,81,226
23	₹ 2,00,000	₹ 24,00,000	₹ 41,26,59,247
24	₹ 2,00,000	₹ 24,00,000	₹ 47,71,48,972
25	₹ 2,00,000	₹ 24,00,000	₹ 55,13,12,156

*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	₹ 2,00,000	₹ 24,00,000	₹ 25,90,838
2	₹ 2,20,000	₹ 26,40,000	₹ 58,29,385
3	₹ 2,42,000	₹ 29,04,000	₹ 98,38,706
4	₹ 2,66,200	₹ 31,94,400	₹ 1,47,62,917
5	₹ 2,92,820	₹ 35,13,840	₹ 2,07,70,599
6	₹ 3,22,102	₹ 38,65,224	₹ 2,80,58,759
7	₹ 3,54,312	₹ 42,51,746	₹ 3,68,57,400
8	₹ 3,89,743	₹ 46,76,921	₹ 4,74,34,820
9	₹ 4,28,718	₹ 51,44,613	₹ 6,01,03,733
10	₹ 4,71,590	₹ 56,59,074	₹ 7,52,28,353
11	₹ 5,18,748	₹ 62,24,982	₹ 9,32,32,571
12	₹ 5,70,623	₹ 68,47,480	₹ 11,46,09,419
13	₹ 6,27,686	₹ 75,32,228	₹ 13,99,31,990
14	₹ 6,90,454	₹ 82,85,451	₹ 16,98,66,063
15	₹ 7,59,500	₹ 91,13,996	₹ 20,51,84,674
16	₹ 8,35,450	₹ 1,00,25,396	₹ 24,67,84,947
17	₹ 9,18,995	₹ 1,10,27,935	₹ 29,57,07,518
18	₹ 10,10,894	₹ 1,21,30,729	₹ 35,31,58,957
19	₹ 11,11,983	₹ 1,33,43,802	₹ 42,05,37,643
20	₹ 12,23,182	₹ 1,46,78,182	₹ 49,94,63,617
21	₹ 13,45,500	₹ 1,61,46,000	₹ 59,18,13,020
22	₹ 14,80,050	₹ 1,77,60,600	₹ 69,97,57,819
23	₹ 16,28,055	₹ 1,95,36,660	₹ 82,58,11,622
24	₹ 17,90,860	₹ 2,14,90,326	₹ 97,28,82,509
25	₹ 19,69,947	₹ 2,36,39,358	₹ 1,14,43,33,943

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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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