

SIP Proposal For 25kSip25Yrs

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

Total Investment

Normal SIP	Step-Up SIP
₹ 75,00,000	₹ 2,95,04,118

Expected Future Value

Normal SIP	Step-Up SIP
₹ 6,89,14,019	₹ 14,30,41,743

*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	₹ 25,000	₹ 3,00,000	₹ 3,23,855
2	₹ 25,000	₹ 3,00,000	₹ 6,96,288
3	₹ 25,000	₹ 3,00,000	₹ 11,24,585
4	₹ 25,000	₹ 3,00,000	₹ 16,17,128
5	₹ 25,000	₹ 3,00,000	₹ 21,83,552
6	₹ 25,000	₹ 3,00,000	₹ 28,34,939
7	₹ 25,000	₹ 3,00,000	₹ 35,84,035
8	₹ 25,000	₹ 3,00,000	₹ 44,45,495
9	₹ 25,000	₹ 3,00,000	₹ 54,36,174
10	₹ 25,000	₹ 3,00,000	₹ 65,75,455
11	₹ 25,000	₹ 3,00,000	₹ 78,85,628
12	₹ 25,000	₹ 3,00,000	₹ 93,92,326
13	₹ 25,000	₹ 3,00,000	₹ 1,11,25,030
14	₹ 25,000	₹ 3,00,000	₹ 1,31,17,639
15	₹ 25,000	₹ 3,00,000	₹ 1,54,09,140
16	₹ 25,000	₹ 3,00,000	₹ 1,80,44,365
17	₹ 25,000	₹ 3,00,000	₹ 2,10,74,875
18	₹ 25,000	₹ 3,00,000	₹ 2,45,59,961
19	₹ 25,000	₹ 3,00,000	₹ 2,85,67,810
20	₹ 25,000	₹ 3,00,000	₹ 3,31,76,836
21	₹ 25,000	₹ 3,00,000	₹ 3,84,77,216
22	₹ 25,000	₹ 3,00,000	₹ 4,45,72,653
23	₹ 25,000	₹ 3,00,000	₹ 5,15,82,406
24	₹ 25,000	₹ 3,00,000	₹ 5,96,43,622
25	₹ 25,000	₹ 3,00,000	₹ 6,89,14,019

*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	₹ 25,000	₹ 3,00,000	₹ 3,23,855
2	₹ 27,500	₹ 3,30,000	₹ 7,28,673
3	₹ 30,250	₹ 3,63,000	₹ 12,29,838
4	₹ 33,275	₹ 3,99,300	₹ 18,45,365
5	₹ 36,603	₹ 4,39,230	₹ 25,96,325
6	₹ 40,263	₹ 4,83,153	₹ 35,07,345
7	₹ 44,289	₹ 5,31,468	₹ 46,07,175
8	₹ 48,718	₹ 5,84,615	₹ 59,29,352
9	₹ 53,590	₹ 6,43,077	₹ 75,12,967
10	₹ 58,949	₹ 7,07,384	₹ 94,03,544
11	₹ 64,844	₹ 7,78,123	₹ 1,16,54,071
12	₹ 71,328	₹ 8,55,935	₹ 1,43,26,177
13	₹ 78,461	₹ 9,41,529	₹ 1,74,91,499
14	₹ 86,307	₹ 10,35,681	₹ 2,12,33,258
15	₹ 94,937	₹ 11,39,250	₹ 2,56,48,084
16	₹ 1,04,431	₹ 12,53,174	₹ 3,08,48,118
17	₹ 1,14,874	₹ 13,78,492	₹ 3,69,63,440
18	₹ 1,26,362	₹ 15,16,341	₹ 4,41,44,870
19	₹ 1,38,998	₹ 16,67,975	₹ 5,25,67,205
20	₹ 1,52,898	₹ 18,34,773	₹ 6,24,32,952
21	₹ 1,68,187	₹ 20,18,250	₹ 7,39,76,627
22	₹ 1,85,006	₹ 22,20,075	₹ 8,74,69,727
23	₹ 2,03,507	₹ 24,42,082	₹ 10,32,26,453
24	₹ 2,23,858	₹ 26,86,291	₹ 12,16,10,314
25	₹ 2,46,243	₹ 29,54,920	₹ 14,30,41,743

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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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