

SIP Proposal For 5kSip25Yrs

Monthly SIP Amount	₹ 5,000
SIP Period	25 Years
Step-Up % Every Year	10.00 %
Assumed Rate of Return	15.00 %

Total Investment

Normal SIP	Step-Up SIP
₹ 15,00,000	₹ 59,00,824

Expected Future Value

Normal SIP	Step-Up SIP
₹ 1,37,82,804	₹ 2,86,08,349

*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	₹ 5,000	₹ 60,000	₹ 64,771
2	₹ 5,000	₹ 60,000	₹ 1,39,258
3	₹ 5,000	₹ 60,000	₹ 2,24,917
4	₹ 5,000	₹ 60,000	₹ 3,23,426
5	₹ 5,000	₹ 60,000	₹ 4,36,710
6	₹ 5,000	₹ 60,000	₹ 5,66,988
7	₹ 5,000	₹ 60,000	₹ 7,16,807
8	₹ 5,000	₹ 60,000	₹ 8,89,099
9	₹ 5,000	₹ 60,000	₹ 10,87,235
10	₹ 5,000	₹ 60,000	₹ 13,15,091
11	₹ 5,000	₹ 60,000	₹ 15,77,126
12	₹ 5,000	₹ 60,000	₹ 18,78,465
13	₹ 5,000	₹ 60,000	₹ 22,25,006
14	₹ 5,000	₹ 60,000	₹ 26,23,528
15	₹ 5,000	₹ 60,000	₹ 30,81,828
16	₹ 5,000	₹ 60,000	₹ 36,08,873
17	₹ 5,000	₹ 60,000	₹ 42,14,975
18	₹ 5,000	₹ 60,000	₹ 49,11,992
19	₹ 5,000	₹ 60,000	₹ 57,13,562
20	₹ 5,000	₹ 60,000	₹ 66,35,367
21	₹ 5,000	₹ 60,000	₹ 76,95,443
22	₹ 5,000	₹ 60,000	₹ 89,14,531
23	₹ 5,000	₹ 60,000	₹ 1,03,16,481
24	₹ 5,000	₹ 60,000	₹ 1,19,28,724
25	₹ 5,000	₹ 60,000	₹ 1,37,82,804

*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	₹ 5,000	₹ 60,000	₹ 64,771
2	₹ 5,500	₹ 66,000	₹ 1,45,735
3	₹ 6,050	₹ 72,600	₹ 2,45,968
4	₹ 6,655	₹ 79,860	₹ 3,69,073
5	₹ 7,321	₹ 87,846	₹ 5,19,265
6	₹ 8,053	₹ 96,631	₹ 7,01,469
7	₹ 8,858	₹ 1,06,294	₹ 9,21,435
8	₹ 9,744	₹ 1,16,923	₹ 11,85,870
9	₹ 10,718	₹ 1,28,615	₹ 15,02,593
10	₹ 11,790	₹ 1,41,477	₹ 18,80,709
11	₹ 12,969	₹ 1,55,625	₹ 23,30,814
12	₹ 14,266	₹ 1,71,187	₹ 28,65,235
13	₹ 15,692	₹ 1,88,306	₹ 34,98,300
14	₹ 17,261	₹ 2,07,136	₹ 42,46,652
15	₹ 18,987	₹ 2,27,850	₹ 51,29,617
16	₹ 20,886	₹ 2,50,635	₹ 61,69,624
17	₹ 22,975	₹ 2,75,698	₹ 73,92,688
18	₹ 25,272	₹ 3,03,268	₹ 88,28,974
19	₹ 27,800	₹ 3,33,595	₹ 1,05,13,441
20	₹ 30,580	₹ 3,66,955	₹ 1,24,86,590
21	₹ 33,637	₹ 4,03,650	₹ 1,47,95,325
22	₹ 37,001	₹ 4,44,015	₹ 1,74,93,945
23	₹ 40,701	₹ 4,88,416	₹ 2,06,45,291
24	₹ 44,772	₹ 5,37,258	₹ 2,43,22,063
25	₹ 49,249	₹ 5,90,984	₹ 2,86,08,349

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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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