

SIP Proposal For 30kSip25Yrs

Monthly SIP Amount	₹ 30,000
SIP Period	25 Years
Step-Up % Every Year	10.00 %
Assumed Rate of Return	15.00 %

Total Investment

Normal SIP	Step-Up SIP
₹ 90,00,000	₹ 3,54,04,941

Expected Future Value

Normal SIP	Step-Up SIP
₹ 8,26,96,823	₹ 17,16,50,092

*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	₹ 30,000	₹ 3,60,000	₹ 3,88,626
2	₹ 30,000	₹ 3,60,000	₹ 8,35,545
3	₹ 30,000	₹ 3,60,000	₹ 13,49,503
4	₹ 30,000	₹ 3,60,000	₹ 19,40,554
5	₹ 30,000	₹ 3,60,000	₹ 26,20,262
6	₹ 30,000	₹ 3,60,000	₹ 34,01,927
7	₹ 30,000	₹ 3,60,000	₹ 43,00,842
8	₹ 30,000	₹ 3,60,000	₹ 53,34,594
9	₹ 30,000	₹ 3,60,000	₹ 65,23,409
10	₹ 30,000	₹ 3,60,000	₹ 78,90,546
11	₹ 30,000	₹ 3,60,000	₹ 94,62,753
12	₹ 30,000	₹ 3,60,000	₹ 1,12,70,792
13	₹ 30,000	₹ 3,60,000	₹ 1,33,50,036
14	₹ 30,000	₹ 3,60,000	₹ 1,57,41,167
15	₹ 30,000	₹ 3,60,000	₹ 1,84,90,968
16	₹ 30,000	₹ 3,60,000	₹ 2,16,53,239
17	₹ 30,000	₹ 3,60,000	₹ 2,52,89,850
18	₹ 30,000	₹ 3,60,000	₹ 2,94,71,953
19	₹ 30,000	₹ 3,60,000	₹ 3,42,81,372
20	₹ 30,000	₹ 3,60,000	₹ 3,98,12,203
21	₹ 30,000	₹ 3,60,000	₹ 4,61,72,659
22	₹ 30,000	₹ 3,60,000	₹ 5,34,87,184
23	₹ 30,000	₹ 3,60,000	₹ 6,18,98,887
24	₹ 30,000	₹ 3,60,000	₹ 7,15,72,346
25	₹ 30,000	₹ 3,60,000	₹ 8,26,96,823

*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	₹ 30,000	₹ 3,60,000	₹ 3,88,626
2	₹ 33,000	₹ 3,96,000	₹ 8,74,408
3	₹ 36,300	₹ 4,35,600	₹ 14,75,806
4	₹ 39,930	₹ 4,79,160	₹ 22,14,437
5	₹ 43,923	₹ 5,27,076	₹ 31,15,590
6	₹ 48,315	₹ 5,79,784	₹ 42,08,814
7	₹ 53,147	₹ 6,37,762	₹ 55,28,610
8	₹ 58,462	₹ 7,01,538	₹ 71,15,223
9	₹ 64,308	₹ 7,71,692	₹ 90,15,560
10	₹ 70,738	₹ 8,48,861	₹ 1,12,84,253
11	₹ 77,812	₹ 9,33,747	₹ 1,39,84,886
12	₹ 85,594	₹ 10,27,122	₹ 1,71,91,413
13	₹ 94,153	₹ 11,29,834	₹ 2,09,89,799
14	₹ 1,03,568	₹ 12,42,818	₹ 2,54,79,909
15	₹ 1,13,925	₹ 13,67,099	₹ 3,07,77,701
16	₹ 1,25,317	₹ 15,03,809	₹ 3,70,17,742
17	₹ 1,37,849	₹ 16,54,190	₹ 4,43,56,128
18	₹ 1,51,634	₹ 18,19,609	₹ 5,29,73,844
19	₹ 1,66,798	₹ 20,01,570	₹ 6,30,80,647
20	₹ 1,83,477	₹ 22,01,727	₹ 7,49,19,543
21	₹ 2,01,825	₹ 24,21,900	₹ 8,87,71,953
22	₹ 2,22,007	₹ 26,64,090	₹ 10,49,63,673
23	₹ 2,44,208	₹ 29,30,499	₹ 12,38,71,743
24	₹ 2,68,629	₹ 32,23,549	₹ 14,59,32,376
25	₹ 2,95,492	₹ 35,45,904	₹ 17,16,50,092

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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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