

SIP Proposal For 3kSip25Yrs

Monthly SIP Amount	₹ 3,000
SIP Period	25 Years
Step-Up % Every Year	10.00 %
Assumed Rate of Return	15.00 %

Total Investment

Normal SIP	Step-Up SIP
₹ 9,00,000	₹ 35,40,494

Expected Future Value

Normal SIP	Step-Up SIP
₹ 82,69,682	₹ 1,71,65,009

*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	₹ 3,000	₹ 36,000	₹ 38,863
2	₹ 3,000	₹ 36,000	₹ 83,555
3	₹ 3,000	₹ 36,000	₹ 1,34,950
4	₹ 3,000	₹ 36,000	₹ 1,94,055
5	₹ 3,000	₹ 36,000	₹ 2,62,026
6	₹ 3,000	₹ 36,000	₹ 3,40,193
7	₹ 3,000	₹ 36,000	₹ 4,30,084
8	₹ 3,000	₹ 36,000	₹ 5,33,459
9	₹ 3,000	₹ 36,000	₹ 6,52,341
10	₹ 3,000	₹ 36,000	₹ 7,89,055
11	₹ 3,000	₹ 36,000	₹ 9,46,275
12	₹ 3,000	₹ 36,000	₹ 11,27,079
13	₹ 3,000	₹ 36,000	₹ 13,35,004
14	₹ 3,000	₹ 36,000	₹ 15,74,117
15	₹ 3,000	₹ 36,000	₹ 18,49,097
16	₹ 3,000	₹ 36,000	₹ 21,65,324
17	₹ 3,000	₹ 36,000	₹ 25,28,985
18	₹ 3,000	₹ 36,000	₹ 29,47,195
19	₹ 3,000	₹ 36,000	₹ 34,28,137
20	₹ 3,000	₹ 36,000	₹ 39,81,220
21	₹ 3,000	₹ 36,000	₹ 46,17,266
22	₹ 3,000	₹ 36,000	₹ 53,48,718
23	₹ 3,000	₹ 36,000	₹ 61,89,889
24	₹ 3,000	₹ 36,000	₹ 71,57,235
25	₹ 3,000	₹ 36,000	₹ 82,69,682

*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	₹ 3,000	₹ 36,000	₹ 38,863
2	₹ 3,300	₹ 39,600	₹ 87,441
3	₹ 3,630	₹ 43,560	₹ 1,47,581
4	₹ 3,993	₹ 47,916	₹ 2,21,444
5	₹ 4,392	₹ 52,708	₹ 3,11,559
6	₹ 4,832	₹ 57,978	₹ 4,20,881
7	₹ 5,315	₹ 63,776	₹ 5,52,861
8	₹ 5,846	₹ 70,154	₹ 7,11,522
9	₹ 6,431	₹ 77,169	₹ 9,01,556
10	₹ 7,074	₹ 84,886	₹ 11,28,425
11	₹ 7,781	₹ 93,375	₹ 13,98,489
12	₹ 8,559	₹ 1,02,712	₹ 17,19,141
13	₹ 9,415	₹ 1,12,983	₹ 20,98,980
14	₹ 10,357	₹ 1,24,282	₹ 25,47,991
15	₹ 11,392	₹ 1,36,710	₹ 30,77,770
16	₹ 12,532	₹ 1,50,381	₹ 37,01,774
17	₹ 13,785	₹ 1,65,419	₹ 44,35,613
18	₹ 15,163	₹ 1,81,961	₹ 52,97,384
19	₹ 16,680	₹ 2,00,157	₹ 63,08,065
20	₹ 18,348	₹ 2,20,173	₹ 74,91,954
21	₹ 20,182	₹ 2,42,190	₹ 88,77,195
22	₹ 22,201	₹ 2,66,409	₹ 1,04,96,367
23	₹ 24,421	₹ 2,93,050	₹ 1,23,87,174
24	₹ 26,863	₹ 3,22,355	₹ 1,45,93,238
25	₹ 29,549	₹ 3,54,590	₹ 1,71,65,009

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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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