

## SIP Proposal For 20kSip25Yrs

Monthly SIP Amount	₹ 20,000
SIP Period	25 Years
Step-Up % Every Year	10.00 %
Assumed Rate of Return	15.00 %

## Total Investment

Normal SIP	Step-Up SIP
₹ 60,00,000	₹ 2,36,03,294

## Expected Future Value

Normal SIP	Step-Up SIP
₹ 5,51,31,216	₹ 11,44,33,394

\*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	₹ 20,000	₹ 2,40,000	₹ 2,59,084
2	₹ 20,000	₹ 2,40,000	₹ 5,57,030
3	₹ 20,000	₹ 2,40,000	₹ 8,99,668
4	₹ 20,000	₹ 2,40,000	₹ 12,93,702
5	₹ 20,000	₹ 2,40,000	₹ 17,46,842
6	₹ 20,000	₹ 2,40,000	₹ 22,67,951
7	₹ 20,000	₹ 2,40,000	₹ 28,67,228
8	₹ 20,000	₹ 2,40,000	₹ 35,56,396
9	₹ 20,000	₹ 2,40,000	₹ 43,48,939
10	₹ 20,000	₹ 2,40,000	₹ 52,60,364
11	₹ 20,000	₹ 2,40,000	₹ 63,08,502
12	₹ 20,000	₹ 2,40,000	₹ 75,13,861
13	₹ 20,000	₹ 2,40,000	₹ 89,00,024
14	₹ 20,000	₹ 2,40,000	₹ 1,04,94,111
15	₹ 20,000	₹ 2,40,000	₹ 1,23,27,312
16	₹ 20,000	₹ 2,40,000	₹ 1,44,35,492
17	₹ 20,000	₹ 2,40,000	₹ 1,68,59,900
18	₹ 20,000	₹ 2,40,000	₹ 1,96,47,969
19	₹ 20,000	₹ 2,40,000	₹ 2,28,54,248
20	₹ 20,000	₹ 2,40,000	₹ 2,65,41,469
21	₹ 20,000	₹ 2,40,000	₹ 3,07,81,773
22	₹ 20,000	₹ 2,40,000	₹ 3,56,58,123
23	₹ 20,000	₹ 2,40,000	₹ 4,12,65,925
24	₹ 20,000	₹ 2,40,000	₹ 4,77,14,897
25	₹ 20,000	₹ 2,40,000	₹ 5,51,31,216

\*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.

Report Date : 28/08/2024

### Step - Up SIP Year-Wise Projected Value

1	₹ 20,000	₹ 2,40,000	₹ 2,59,084
2	₹ 22,000	₹ 2,64,000	₹ 5,82,938
3	₹ 24,200	₹ 2,90,400	₹ 9,83,871
4	₹ 26,620	₹ 3,19,440	₹ 14,76,292
5	₹ 29,282	₹ 3,51,384	₹ 20,77,060
6	₹ 32,210	₹ 3,86,522	₹ 28,05,876
7	₹ 35,431	₹ 4,25,175	₹ 36,85,740
8	₹ 38,974	₹ 4,67,692	₹ 47,43,482
9	₹ 42,872	₹ 5,14,461	₹ 60,10,373
10	₹ 47,159	₹ 5,65,907	₹ 75,22,835
11	₹ 51,875	₹ 6,22,498	₹ 93,23,257
12	₹ 57,062	₹ 6,84,748	₹ 1,14,60,942
13	₹ 62,769	₹ 7,53,223	₹ 1,39,93,199
14	₹ 69,045	₹ 8,28,545	₹ 1,69,86,606
15	₹ 75,950	₹ 9,11,400	₹ 2,05,18,467
16	₹ 83,545	₹ 10,02,540	₹ 2,46,78,495
17	₹ 91,899	₹ 11,02,794	₹ 2,95,70,752
18	₹ 1,01,089	₹ 12,13,073	₹ 3,53,15,896
19	₹ 1,11,198	₹ 13,34,380	₹ 4,20,53,764
20	₹ 1,22,318	₹ 14,67,818	₹ 4,99,46,362
21	₹ 1,34,550	₹ 16,14,600	₹ 5,91,81,302
22	₹ 1,48,005	₹ 17,76,060	₹ 6,99,75,782
23	₹ 1,62,805	₹ 19,53,666	₹ 8,25,81,162
24	₹ 1,79,086	₹ 21,49,033	₹ 9,72,88,251
25	₹ 1,96,995	₹ 23,63,936	₹ 11,44,33,394

\*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.

Report Date : 28/08/2024

## SUGGESTED SCHEMES FOR INVESTMENT

### EQUITY

S. No.	Scheme Name	Past Performance (%)				
		1 Yr	3 Yr	5 Yr	10 Yr	Since Inception
1	<b>Tata Ethical Fund-Reg(G)</b> <i>Equity - Thematic Fund - Other</i>	36.92%	17.19%	23.51%	14.74%	16.48%
2	<b>Taurus Ethical Fund-Reg(G)</b> <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.

Report Date : 28/08/2024