

How to Maximize Your Wealth with SIP Yearly Increase



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SIP amount

₹ 10,000



SIP period

10 Years



Step-up every year

10 %

SIP with Step-up (Summary)

Total Investment	₹ 19,12,491
Expected wealth creation @ 12%	₹ 32,68,899
Expected wealth creation @ 15%	₹ 37,61,417

* Mutual fund investments are subject to market risks. read all scheme related documents carefully. The above calculation is based on the assumed rate of return and only for illustrative purposes only.



SIP – with step up

Projected yearly future value of SIP

Years	Monthly investment	Annual investment	Year end value	
			CAGR @ 12%	CAGR @ 15%
1	₹ 10,000	₹ 1,20,000	₹ 1,27,665	₹ 1,29,542
2	₹ 11,000	₹ 1,32,000	₹ 2,83,416	₹ 2,91,469
3	₹ 12,100	₹ 1,45,200	₹ 4,71,901	₹ 4,91,935
4	₹ 13,310	₹ 1,59,720	₹ 6,98,451	₹ 7,38,145
5	₹ 14,641	₹ 1,75,692	₹ 9,69,179	₹ 10,38,529
6	₹ 16,105	₹ 1,93,261	₹ 12,91,086	₹ 14,02,937
7	₹ 17,716	₹ 2,12,587	₹ 16,72,183	₹ 18,42,869
8	₹ 19,487	₹ 2,33,846	₹ 21,21,628	₹ 23,71,740
9	₹ 21,436	₹ 2,57,231	₹ 26,49,885	₹ 30,05,186
10	₹ 23,579	₹ 2,82,954	₹ 32,68,899	₹ 37,61,417

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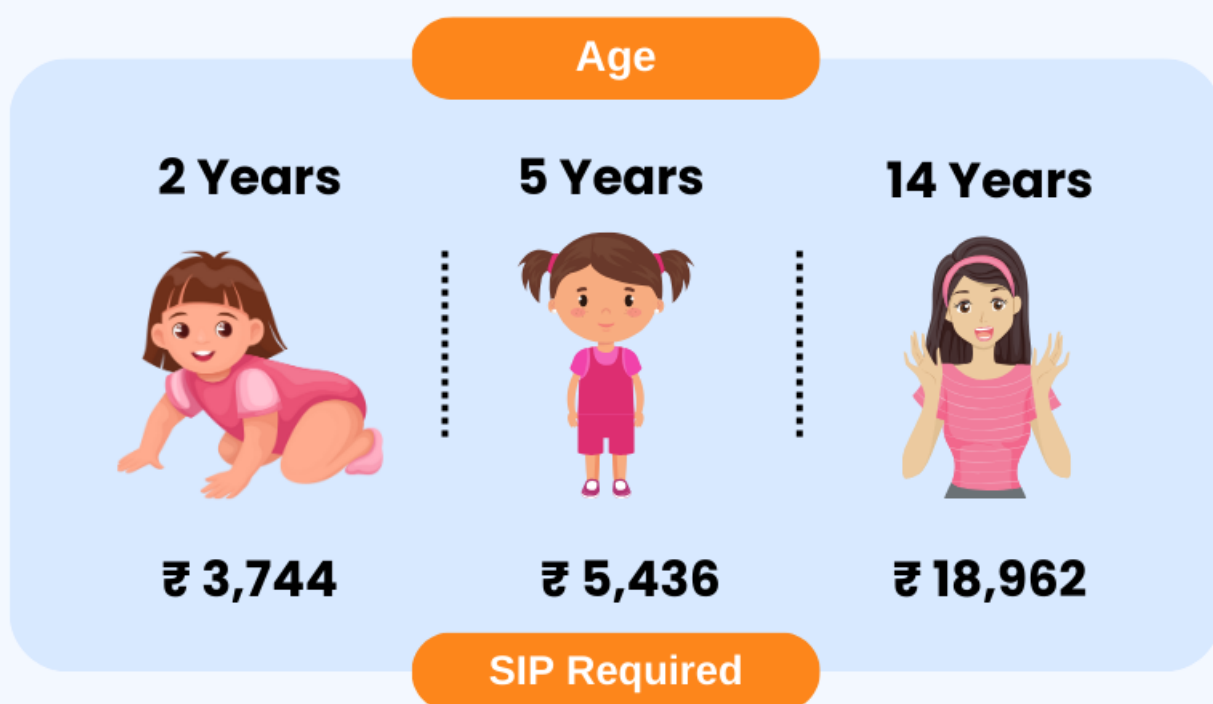
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Plan your kid's marriage with **Systematic Investment Plan**

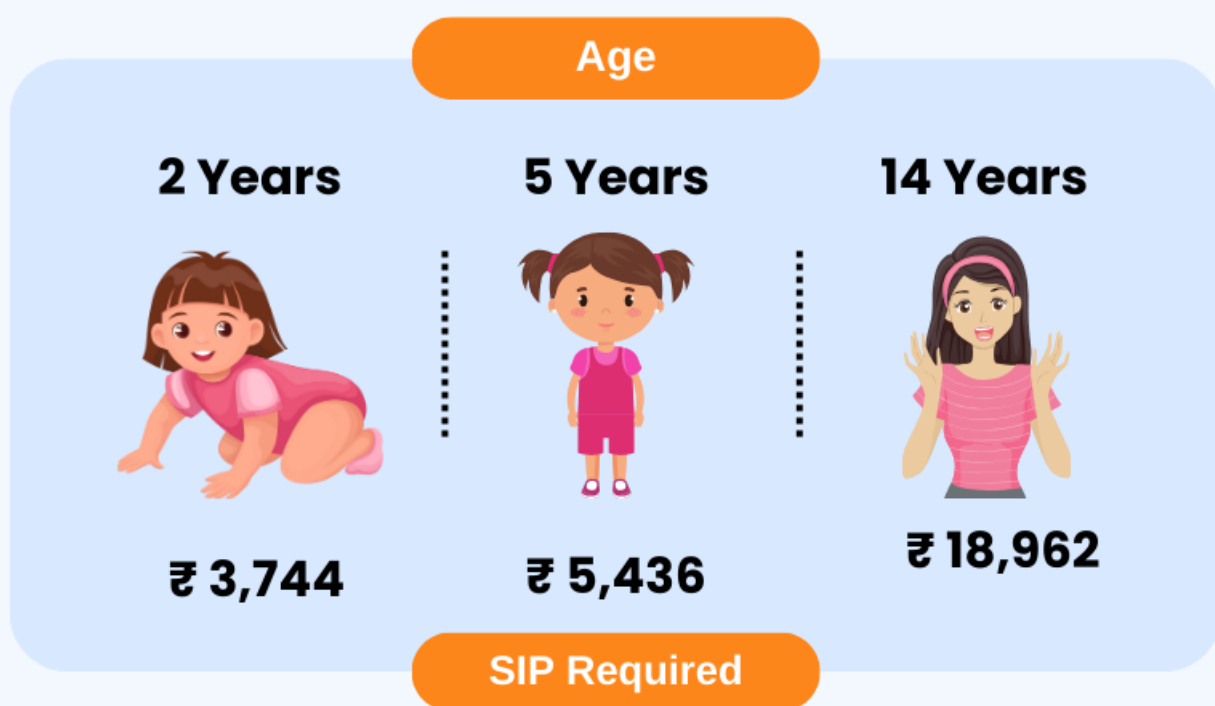
If you wish to accumulate Rs. 50 Lacs by the time your kid attains the age of 25 years, your monthly investment required will depend mainly on when exactly you start investing.



*The rate of return is assumed 12% CAGR for the purpose of above calculation and is only for the illustrative purposes.

Plan your kid's marriage with **Systematic Investment Plan**

If you wish to accumulate Rs. 50 Lacs by the time your kid attains the age of 25 years, your monthly investment required will depend mainly on when exactly you start investing.



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What are Mutual Funds?



- Mutual funds combine money from many investors to create a diversified portfolio.
- Expert fund managers make investment decisions based on market analysis.
- Spread investments across various assets to reduce risk.
- Easily buy/sell shares, providing flexibility and access for a wide range of investors.

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Why should you invest in **Mutual Funds?**



DIVERSIFICATION:

Mutual funds offer a diversified portfolio, spreading risk across various assets.



PROFESSIONAL MANAGEMENT

Skilled fund managers make investment decisions based on market expertise.



LIQUIDITY

Easily buy or sell fund shares, providing flexibility for investors.



REGULATORY SUPERVISION:

Mutual funds are regulated, providing investor protection and transparency.



GOAL-ORIENTED OPTIONS

Goal-Oriented Options: Various funds cater to specific financial goals, allowing you to align their investments with their objectives.

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Disclaimer

This investment proposal is based on assumed rates of return and is for informational purposes only. It is not intended to be, nor should it be construed as, investment advice or a recommendation to buy or sell any financial products or securities.

The assumed rates of return used in this proposal are assumed and only for the illustrative purposes at the time of preparation. Actual returns may vary significantly from these assumptions, and there can be no assurance that the proposed investment strategy will be successful.

Investors should carefully consider their own investment objectives, risk tolerance, and financial circumstances before making any investment decisions.

The information contained in this proposal is subject to change without notice and may not be updated. We do not assume any liability for any losses that may result from the use of this proposal or the information contained herein.

Past performance is not a guarantee of future results. The value of investments may fluctuate, and investors may not get back the amount invested.

Mutual fund investments are subject to market risk, read all scheme related documents carefully.

By using this investment proposal, you acknowledge that you have read and understand this disclaimer, and that you accept and agree to be bound by its terms and conditions.


(Signature)


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