

Lumpsum Investment Required for Target Future Value Calculator Case study PDF

Mr Raman Patani is 35 years of age and wants to save Rs 3 Crore at the time of his retirement. He wants to know how much he should invest one time in a mutual fund scheme offering 12% or 15% return.

Lumpsum Investment Proposal For Mr Raman Patani

Target Amount	₹ 3,00,00,000	
Investment Period	25 Years	
Assumed Rate of Return	Scenario 1	12.00 %
	Scenario 2	15.00 %

Initial Investment Required

Scenario 1 @ 12.00 %	Scenario 2 @ 15.00 %
₹ 17,64,699	₹ 9,11,329

* Mutual fund investments are subject to market risks, read all scheme related documents carefully. Returns are not guaranteed. The above is for illustration purpose only.

Projected Annual Investment Value

Year	Scenario 1 @ 12.00 %		Scenario 2 @ 15.00 %	
	Annual Investment	Year End Value	Annual Investment	Year End Value
1	₹ 17,64,699	₹ 19,76,463	₹ 9,11,329	₹ 10,48,028
2	--	₹ 22,13,639	--	₹ 12,05,233
3	--	₹ 24,79,275	--	₹ 13,86,018
4	--	₹ 27,76,788	--	₹ 15,93,920
5	--	₹ 31,10,003	--	₹ 18,33,008
6	--	₹ 34,83,203	--	₹ 21,07,960
7	--	₹ 39,01,188	--	₹ 24,24,154
8	--	₹ 43,69,330	--	₹ 27,87,777
9	--	₹ 48,93,650	--	₹ 32,05,943
10	--	₹ 54,80,888	--	₹ 36,86,835
11	--	₹ 61,38,594	--	₹ 42,39,860
12	--	₹ 68,75,226	--	₹ 48,75,839
13	--	₹ 77,00,253	--	₹ 56,07,215
14	--	₹ 86,24,283	--	₹ 64,48,297
15	--	₹ 96,59,197	--	₹ 74,15,541
16	--	₹ 1,08,18,301	--	₹ 85,27,872
17	--	₹ 1,21,16,497	--	₹ 98,07,053
18	--	₹ 1,35,70,476	--	₹ 1,12,78,111
19	--	₹ 1,51,98,934	--	₹ 1,29,69,828
20	--	₹ 1,70,22,806	--	₹ 1,49,15,302
21	--	₹ 1,90,65,542	--	₹ 1,71,52,597
22	--	₹ 2,13,53,407	--	₹ 1,97,25,487
23	--	₹ 2,39,15,816	--	₹ 2,26,84,310
24	--	₹ 2,67,85,714	--	₹ 2,60,86,957
25	--	₹ 3,00,00,000	--	₹ 3,00,00,000

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