

Portfolio Projection Report

Current Portfolio Value	₹ 20,00,000
Lumpsum Investment Every Year	₹ 1,00,000
Increment in Annual Lumpsum	₹ 1,00,000
Current Monthly SIP	₹ 25,000
Increment in SIP	₹ 50,000
Assumed Rate of Return	12 %
Period	20 Years

Expected Portfolio Value

	Current Scenario	Incremental Scenario
Current Portfolio	₹ 1,92,92,586	₹ 1,92,92,586
Annual Lumpsum	₹ 80,69,874	₹ 1,61,39,747
SIP	₹ 2,29,96,434	₹ 6,89,89,302
TOTAL	₹ 5,03,58,894	₹ 10,44,21,635

* 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.

Annual Investment & Expected Fund Value

Year	Current Scenario			Incremental Scenario		
	Annual Investment	Cumulative Investment	Expected Fund Value	Annual Investment	Cumulative Investment	Expected Fund Value
1	₹24,00,000	₹24,00,000	₹26,71,162	₹31,00,000	₹31,00,000	₹34,21,487
2	₹4,00,000	₹28,00,000	₹34,22,864	₹11,00,000	₹42,00,000	₹50,13,553
3	₹4,00,000	₹32,00,000	₹42,64,771	₹11,00,000	₹53,00,000	₹67,96,667
4	₹4,00,000	₹36,00,000	₹52,07,705	₹11,00,000	₹64,00,000	₹87,93,754
5	₹4,00,000	₹40,00,000	₹62,63,793	₹11,00,000	₹75,00,000	₹1,10,30,492
6	₹4,00,000	₹44,00,000	₹74,46,610	₹11,00,000	₹86,00,000	₹1,35,35,639
7	₹4,00,000	₹48,00,000	₹87,71,366	₹11,00,000	₹97,00,000	₹1,63,41,402
8	₹4,00,000	₹52,00,000	₹1,02,55,092	₹11,00,000	₹1,08,00,000	₹1,94,83,858
9	₹4,00,000	₹56,00,000	₹1,19,16,866	₹11,00,000	₹1,19,00,000	₹2,30,03,408
10	₹4,00,000	₹60,00,000	₹1,37,78,052	₹11,00,000	₹1,30,00,000	₹2,69,45,305
11	₹4,00,000	₹64,00,000	₹1,58,62,581	₹11,00,000	₹1,41,00,000	₹3,13,60,229
12	₹4,00,000	₹68,00,000	₹1,81,97,253	₹11,00,000	₹1,52,00,000	₹3,63,04,943
13	₹4,00,000	₹72,00,000	₹2,08,12,086	₹11,00,000	₹1,63,00,000	₹4,18,43,024
14	₹4,00,000	₹76,00,000	₹2,37,40,698	₹11,00,000	₹1,74,00,000	₹4,80,45,674
15	₹4,00,000	₹80,00,000	₹2,70,20,745	₹11,00,000	₹1,85,00,000	₹5,49,92,643
16	₹4,00,000	₹84,00,000	₹3,06,94,396	₹11,00,000	₹1,96,00,000	₹6,27,73,247
17	₹4,00,000	₹88,00,000	₹3,48,08,886	₹11,00,000	₹2,07,00,000	₹7,14,87,524
18	₹4,00,000	₹92,00,000	₹3,94,17,115	₹11,00,000	₹2,18,00,000	₹8,12,47,514
19	₹4,00,000	₹96,00,000	₹4,45,78,331	₹11,00,000	₹2,29,00,000	₹9,21,78,703
20	₹4,00,000	₹1,00,00,000	₹5,03,58,894	₹11,00,000	₹2,40,00,000	₹10,44,21,635

* The above is for illustration purpose only. The actual figures may vary. It is assumed that the new investment is done at the start of the year. The annual investment for 1st year includes market value of existing investment, wherever applicable.