





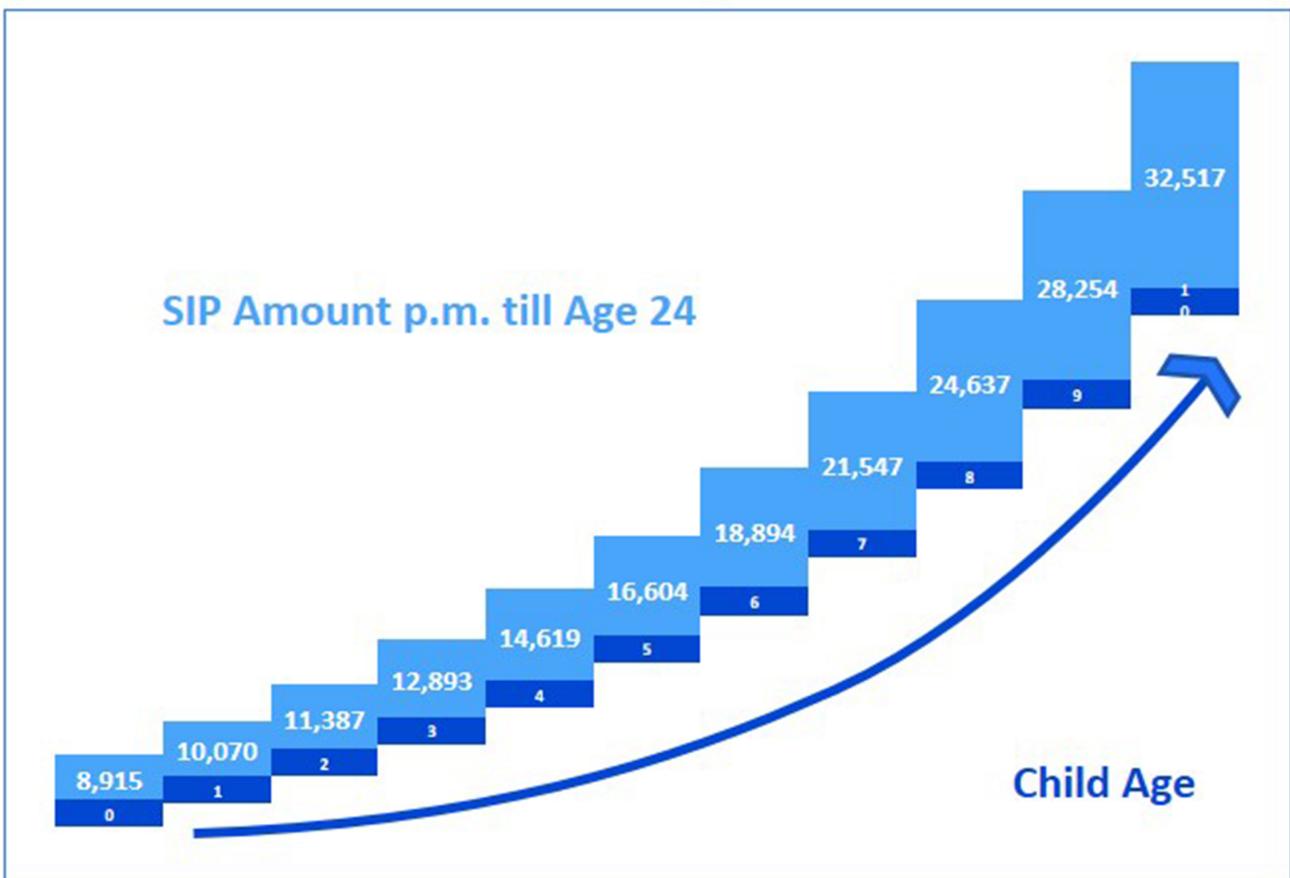
# Children Education / Marriage Expenses Calculation

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Scenario:

Fund Requirement at Age 18	Rs.25 Lacs
Fund Requirement at Age 21	Rs.25 Lacs
Fund Requirement at Age 24	Rs.50 Lacs



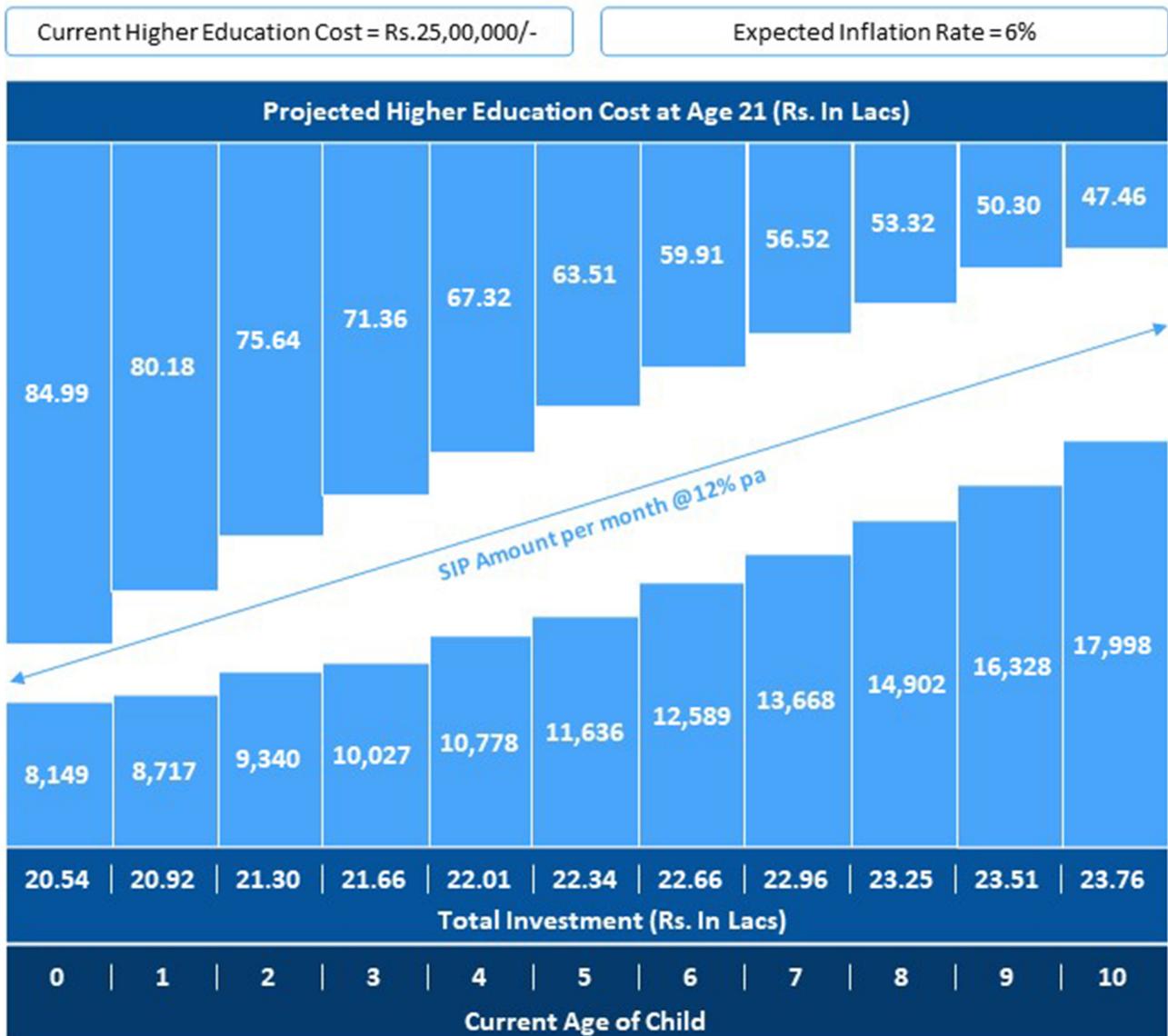
Different amounts of money is required at different stages for a child's Education / Marriage. The above illustration shows a complete Education / Marriage expenses calculation for your child. For example, if the current age of your child is 4 years, an SIP amount of Rs.14,619/- till the age 24 will provide required sums of money at different time periods.

The earlier you start, the easier for you to save money for your financial goal.

Rate of Return assumed @12% pa. The above is for illustration purpose only.

Mutual Fund investments are subject to market risk, please read all scheme related document carefully.

# Child Higher Education Expenses Calculation.



The above illustration shows how an amount of Rs.25 Lacs required for Child's Education will increase due to effect of inflation. For example, if the age of your child is 5 years at present, then an amount of Rs.25 Lacs required for his education will grow to 63.51 Lacs when he becomes of 21 years of age. An SIP of Rs. 11,636 is required to achieve this goal.. The above is for illustration purpose only.

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## Child Education Proposal For Mr Sunil Meheta

Child Name	Master Ayush Mehta
Child Age	4 Years
Fund Required at Age	21 Years
Fund Required	₹ 1,00,00,000
Current Investment	₹ 5,00,000
Assumed Rate of Return (CI)	12.00 %
Expected Inflation Rate	6.00 %
Assumed Return (Scenario 1)	12.00 %
Assumed Return (Scenario 2)	15.00 %
Inflated Cost of Funds Required	₹2,69,27,728
Expected FV of Current Investment	₹34,33,020
Balance Fund Required	₹ 2,34,94,707

### Available Investment Options:

Investment Option	Option 1 @ 12.00 %	Option 2 @ 15.00 %
Monthly SIP Till Age 21	₹ 37,647	₹ 27,871
Monthly SIP For 5 Years	₹ 74,356	₹ 50,277
Monthly SIP For 10 Years	₹ 47,438	₹ 33,581
Lumpsum Investment	₹ 34,21,871	₹ 21,83,267

\*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 : 16/01/2024

## SUGGESTED SCHEMES FOR INVESTMENT

### EQUITY

S. No.	Scheme Name	Past Performance (%)					Type	Amount (₹)
		3 Mth	6 Mth	1 Yr	3 Yr	5 Yr		
1	<b>HDFC Top 100 Fund(G)</b> <i>Equity - Large Cap Fund</i>	14.91%	20.32%	33.18%	21.38%	16.54%	SIP	25,000
2	<b>Nippon India Flexi Cap Fund-Reg(G)</b> <i>Equity - Flexi Cap Fund</i>	13.45%	21.65%	36.47%	N/A	N/A	Lumpsum	10,00,000

\*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 : 16/01/2024