

## Lumpsum Investment Proposal For Mr Rahul Bansal

<b>Initial Investment</b>	₹ 10,00,000	
<b>Time Period</b>	20 Years	
<b>Expected Rate of Return</b>	Scenario 1	8.00 %
	Scenario 2	10.00 %

### Expected Future Value

<b>Scenario 1 @ 8.00 %</b>	<b>Scenario 2 @ 10.00 %</b>
<b>₹ 46,60,957</b>	<b>₹ 67,27,500</b>

\* Mutual fund investments are subject to marker risks, read all scheme related documents carefully.

\* Returns are not guaranteed. The above is for illustration purpose only.

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### Projected Annual Investment Value

Year	Annual Investment	Year End Value @ 8.00 %	Year End Value @ 10.00 %
1	₹ 10,00,000	₹ 10,80,000	₹ 11,00,000
2	--	₹ 11,66,400	₹ 12,10,000
3	--	₹ 12,59,712	₹ 13,31,000
4	--	₹ 13,60,489	₹ 14,64,100
5	--	₹ 14,69,328	₹ 16,10,510
6	--	₹ 15,86,874	₹ 17,71,561
7	--	₹ 17,13,824	₹ 19,48,717
8	--	₹ 18,50,930	₹ 21,43,589
9	--	₹ 19,99,005	₹ 23,57,948
10	--	₹ 21,58,925	₹ 25,93,742
11	--	₹ 23,31,639	₹ 28,53,117
12	--	₹ 25,18,170	₹ 31,38,428
13	--	₹ 27,19,624	₹ 34,52,271
14	--	₹ 29,37,194	₹ 37,97,498
15	--	₹ 31,72,169	₹ 41,77,248
16	--	₹ 34,25,943	₹ 45,94,973
17	--	₹ 37,00,018	₹ 50,54,470
18	--	₹ 39,96,019	₹ 55,59,917
19	--	₹ 43,15,701	₹ 61,15,909
20	--	₹ 46,60,957	₹ 67,27,500

\*Returns are not guaranteed. The above is for illustration purpose only. Report Date : 03/06/2020

## Suggested Schemes For Investment

### HYBRID

S. No.	Scheme Name	Category	Past Performance						
			7 Day	1 Mth	3 Mth	6 Mth	1 Yr	3 Yr	5 Yr
1	HDFC Balanced Advantage Fund(G)	Hybrid - Balanced Advantage	-1.82%	7.09%	-21.45%	-18.11%	-20.41%	-0.92%	4.29%
2	ICICI Pru Balanced Advantage Fund(G)	Hybrid - Balanced Advantage	-0.98%	5.72%	-15.79%	-12.38%	-8.98%	1.91%	5.35%
3	Nippon India Balanced Advantage Fund(G)	Hybrid - Balanced Advantage	-0.96%	4.23%	-14.16%	-9.79%	-9.92%	0.95%	4.61%

\*Returns over 1 year are annualized. Returns shown for 1 year and below are absolute. Past performance is a not a guarantee of future returns. Report Date : 03/06/2020. Performance data is as per last published NAV and AUM is as per last published month-end data. Source : Accord Fintech. Mutual funds investments are subject to market risk. Please read the offer documents carefully before investing.

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