

Monthly Annuity Calculation Proposal For Mr Rahul Bansal

Initial Investment	₹ 50,00,000	
Annuity Period	20 Years	
Expected Rate of Return	Scenario 1	6.00 %
	Scenario 2	7.00 %
Balance Required	₹ 25,00,000	

Monthly Annuity Amount

Scenario 1 @ 6.00 %	Scenario 2 @ 7.00 %
₹ 29,851	₹ 33,196

- * 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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Annual Withdrawal & Projected Investment Value

Year	Scenario 1 @ 6.00 %		Scenario 2 @ 7.00 %	
	Monthly Annuity	Year End Balance	Monthly Annuity	Year End Balance
1	₹ 29,851	₹ 49,32,039	₹ 33,196	₹ 49,39,018
2	₹ 29,851	₹ 48,60,000	₹ 33,196	₹ 48,73,767
3	₹ 29,851	₹ 47,83,638	₹ 33,196	₹ 48,03,948
4	₹ 29,851	₹ 47,02,695	₹ 33,196	₹ 47,29,242
5	₹ 29,851	₹ 46,16,895	₹ 33,196	₹ 46,49,307
6	₹ 29,851	₹ 45,25,948	₹ 33,196	₹ 45,63,776
7	₹ 29,851	₹ 44,29,543	₹ 33,196	₹ 44,72,258
8	₹ 29,851	₹ 43,27,354	₹ 33,196	₹ 43,74,333
9	₹ 29,851	₹ 42,19,034	₹ 33,196	₹ 42,69,555
10	₹ 29,851	₹ 41,04,215	₹ 33,196	₹ 41,57,441
11	₹ 29,851	₹ 39,82,506	₹ 33,196	₹ 40,37,480
12	₹ 29,851	₹ 38,53,495	₹ 33,196	₹ 39,09,121
13	₹ 29,851	₹ 37,16,744	₹ 33,196	₹ 37,71,777
14	₹ 29,851	₹ 35,71,787	₹ 33,196	₹ 36,24,819
15	₹ 29,851	₹ 34,18,133	₹ 33,196	₹ 34,67,574
16	₹ 29,851	₹ 32,55,259	₹ 33,196	₹ 32,99,322
17	₹ 29,851	₹ 30,82,613	₹ 33,196	₹ 31,19,292
18	₹ 29,851	₹ 28,99,609	₹ 33,196	₹ 29,26,660
19	₹ 29,851	₹ 27,05,624	₹ 33,196	₹ 27,20,544
20	₹ 29,851	₹ 25,00,000	₹ 33,196	₹ 25,00,000

*The above chart is approximate and for illustration purpose only

Suggested Schemes For Investment

DEBT

S. No.	Scheme Name	Category	Past Performance						
			7 Day	1 Mth	3 Mth	6 Mth	1 Yr	3 Yr	5 Yr
1	Aditya Birla SL Low Duration Fund(G)	Debt - Low Duration Fund	-0.15%	0.46%	1.39%	2.97%	7.58%	7.17%	7.49%
2	Franklin India Low Duration Fund(G)	Debt - Low Duration Fund	-0.56%	0.22%	-1.85%	-8.32%	-5.33%	3.48%	5.88%

*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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