

Term Insurance + SIP (Goal Based) Proposal For Mr Rajesh Agarwal

Current Age	37 Years
Term Insurance / Goal Amount	₹ 1,00,00,000
Term Insurance Period	25 Years
Term Insurance Annual Premium	₹ 27,000

Monthly SIP Required To Achieve Goal @ 11.00 %

₹ 6,880

If you take Term Cover of ₹ 1,00,00,000 and do Monthly SIP of ₹ 6,880 you may be assured of minimum payout of ₹ 1,00,00,000 either on survival at age 62 or unfortunate event of death, subject to fund performance at expected rate of return mentioned herewith.

* 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.

Yearwise Projected Value

Age	Life Cover	Annual Investment (Insurance Premium + SIP)	Year End SIP Value @ 11.00 %	In case of Death (Life Cover + SIP Value)
38	₹ 1,00,00,000	₹ 1,09,562	₹ 87,402	₹ 1,00,87,402
39	₹ 1,00,00,000	₹ 1,09,562	₹ 1,84,419	₹ 1,01,84,419
40	₹ 1,00,00,000	₹ 1,09,562	₹ 2,92,108	₹ 1,02,92,108
41	₹ 1,00,00,000	₹ 1,09,562	₹ 4,11,642	₹ 1,04,11,642
42	₹ 1,00,00,000	₹ 1,09,562	₹ 5,44,325	₹ 1,05,44,325
43	₹ 1,00,00,000	₹ 1,09,562	₹ 6,91,603	₹ 1,06,91,603
44	₹ 1,00,00,000	₹ 1,09,562	₹ 8,55,082	₹ 1,08,55,082
45	₹ 1,00,00,000	₹ 1,09,562	₹ 10,36,543	₹ 1,10,36,543
46	₹ 1,00,00,000	₹ 1,09,562	₹ 12,37,965	₹ 1,12,37,965
47	₹ 1,00,00,000	₹ 1,09,562	₹ 14,61,544	₹ 1,14,61,544
48	₹ 1,00,00,000	₹ 1,09,562	₹ 17,09,716	₹ 1,17,09,716
49	₹ 1,00,00,000	₹ 1,09,562	₹ 19,85,188	₹ 1,19,85,188
50	₹ 1,00,00,000	₹ 1,09,562	₹ 22,90,961	₹ 1,22,90,961
51	₹ 1,00,00,000	₹ 1,09,562	₹ 26,30,369	₹ 1,26,30,369
52	₹ 1,00,00,000	₹ 1,09,562	₹ 30,07,112	₹ 1,30,07,112
53	₹ 1,00,00,000	₹ 1,09,562	₹ 34,25,296	₹ 1,34,25,296
54	₹ 1,00,00,000	₹ 1,09,562	₹ 38,89,481	₹ 1,38,89,481
55	₹ 1,00,00,000	₹ 1,09,562	₹ 44,04,727	₹ 1,44,04,727
56	₹ 1,00,00,000	₹ 1,09,562	₹ 49,76,649	₹ 1,49,76,649
57	₹ 1,00,00,000	₹ 1,09,562	₹ 56,11,483	₹ 1,56,11,483
58	₹ 1,00,00,000	₹ 1,09,562	₹ 63,16,148	₹ 1,63,16,148
59	₹ 1,00,00,000	₹ 1,09,562	₹ 70,98,327	₹ 1,70,98,327
60	₹ 1,00,00,000	₹ 1,09,562	₹ 79,66,546	₹ 1,79,66,546
61	₹ 1,00,00,000	₹ 1,09,562	₹ 89,30,268	₹ 1,89,30,268
62	₹ 1,00,00,000	₹ 1,09,562	₹ 1,00,00,000	₹ 2,00,00,000

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

Suggested Schemes For Investment

EQUITY										
S. No.	Scheme Name	Category	Past Performance							
			7 Day	1 Mth	3 Mth	6 Mth	1 Yr	3 Yr	5 Yr	10 Yr
1	HDFC Top 100 Fund(G)	Equity - Large ..	2.44%	13.84%	11.21%	27.72%	-0.27%	3.50%	8.65%	8.15%
2	Axis Bluechip Fund-Reg(G)	Equity - Large ..	1.88%	11.39%	14.35%	27.41%	13.05%	13.61%	13.57%	11.73%

*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. Performance data is as per last published NAV. Source : Accord Fintech. Mutual funds investments are subject to market risk. Please read the offer documents carefully before investing.

Report Date : 03/12/2020