

SIP + Lumpsum Proposal For Mr Dummy

Target Amount	₹ 50,00,000	
SIP Amount	₹ 25,000	
Period	20 Years	
Assumed Rate of Return	SIP	12.00 %
	Lumpsum	10.00 %

Lumpsum Investment Required

₹ -26,75,055

* 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 & Yearwise Projected Value

Year	Annual Investment	Cumulative Investment	SIP Fund Value	Lumpsum Fund Value	Total Fund Value
1	₹ -23,75,055	₹ -23,75,055	₹ 3,19,162	₹ -29,42,561	₹ -26,23,398
2	₹ 3,00,000	₹ -20,75,055	₹ 6,76,624	₹ -32,36,817	₹ -25,60,192
3	₹ 3,00,000	₹ -17,75,055	₹ 10,76,982	₹ -35,60,499	₹ -24,83,517
4	₹ 3,00,000	₹ -14,75,055	₹ 15,25,382	₹ -39,16,548	₹ -23,91,166
5	₹ 3,00,000	₹ -11,75,055	₹ 20,27,590	₹ -43,08,203	₹ -22,80,613
6	₹ 3,00,000	₹ -8,75,055	₹ 25,90,064	₹ -47,39,024	₹ -21,48,960
7	₹ 3,00,000	₹ -5,75,055	₹ 32,20,034	₹ -52,12,926	₹ -19,92,892
8	₹ 3,00,000	₹ -2,75,055	₹ 39,25,600	₹ -57,34,218	₹ -18,08,618
9	₹ 3,00,000	₹ 24,945	₹ 47,15,835	₹ -63,07,640	₹ -15,91,806
10	₹ 3,00,000	₹ 3,24,945	₹ 56,00,897	₹ -69,38,404	₹ -13,37,507
11	₹ 3,00,000	₹ 6,24,945	₹ 65,92,167	₹ -76,32,245	₹ -10,40,077
12	₹ 3,00,000	₹ 9,24,945	₹ 77,02,390	₹ -83,95,469	₹ -6,93,079
13	₹ 3,00,000	₹ 12,24,945	₹ 89,45,839	₹ -92,35,016	₹ -2,89,177
14	₹ 3,00,000	₹ 15,24,945	₹ 1,03,38,502	₹ -1,01,58,518	₹ 1,79,984
15	₹ 3,00,000	₹ 18,24,945	₹ 1,18,98,285	₹ -1,11,74,370	₹ 7,23,915
16	₹ 3,00,000	₹ 21,24,945	₹ 1,36,45,242	₹ -1,22,91,806	₹ 13,53,435
17	₹ 3,00,000	₹ 24,24,945	₹ 1,56,01,833	₹ -1,35,20,987	₹ 20,80,846
18	₹ 3,00,000	₹ 27,24,945	₹ 1,77,93,215	₹ -1,48,73,086	₹ 29,20,130
19	₹ 3,00,000	₹ 30,24,945	₹ 2,02,47,564	₹ -1,63,60,394	₹ 38,87,169
20	₹ 3,00,000	₹ 33,24,945	₹ 2,29,96,434	₹ -1,79,96,434	₹ 50,00,000

*The above chart is approximate and for illustration purpose only