

SIP + STP Proposal For Mr Dummy

SIP Amount	₹ 15,000	
Assumed Rate of Return	12.00 %	
STP Amount	₹ 3,00,000	
Assumed Rate of Return	Debt	7.00 %
	Equity	12.00 %
Period	20 Years	
Monthly Transfer Mode	Capital Appreciation	

Expected Future Value

SIP Fund Value	₹ 1,37,97,860
STP Debt Fund Value	₹ 3,00,000
STP Equity Fund Value	₹ 15,45,636
Total Fund Value	₹ 1,56,43,496

* 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	STP Fund Value	Total Fund Value
1	₹ 4,80,000	₹ 4,80,000	₹ 1,91,497	₹ 3,21,452	₹ 5,12,949
2	₹ 1,80,000	₹ 6,60,000	₹ 4,05,975	₹ 3,45,477	₹ 7,51,452
3	₹ 1,80,000	₹ 8,40,000	₹ 6,46,189	₹ 3,72,386	₹ 10,18,575
4	₹ 1,80,000	₹ 10,20,000	₹ 9,15,229	₹ 4,02,524	₹ 13,17,753
5	₹ 1,80,000	₹ 12,00,000	₹ 12,16,554	₹ 4,36,278	₹ 16,52,833
6	₹ 1,80,000	₹ 13,80,000	₹ 15,54,038	₹ 4,74,083	₹ 20,28,121
7	₹ 1,80,000	₹ 15,60,000	₹ 19,32,020	₹ 5,16,425	₹ 24,48,445
8	₹ 1,80,000	₹ 17,40,000	₹ 23,55,360	₹ 5,63,847	₹ 29,19,207
9	₹ 1,80,000	₹ 19,20,000	₹ 28,29,501	₹ 6,16,961	₹ 34,46,461
10	₹ 1,80,000	₹ 21,00,000	₹ 33,60,538	₹ 6,76,447	₹ 40,36,986
11	₹ 1,80,000	₹ 22,80,000	₹ 39,55,300	₹ 7,43,073	₹ 46,98,373
12	₹ 1,80,000	₹ 24,60,000	₹ 46,21,434	₹ 8,17,693	₹ 54,39,127
13	₹ 1,80,000	₹ 26,40,000	₹ 53,67,503	₹ 9,01,268	₹ 62,68,771
14	₹ 1,80,000	₹ 28,20,000	₹ 62,03,101	₹ 9,94,871	₹ 71,97,973
15	₹ 1,80,000	₹ 30,00,000	₹ 71,38,971	₹ 10,99,707	₹ 82,38,678
16	₹ 1,80,000	₹ 31,80,000	₹ 81,87,145	₹ 12,17,124	₹ 94,04,269
17	₹ 1,80,000	₹ 33,60,000	₹ 93,61,100	₹ 13,48,630	₹ 1,07,09,730
18	₹ 1,80,000	₹ 35,40,000	₹ 1,06,75,929	₹ 14,95,917	₹ 1,21,71,847
19	₹ 1,80,000	₹ 37,20,000	₹ 1,21,48,538	₹ 16,60,879	₹ 1,38,09,417
20	₹ 1,80,000	₹ 39,00,000	₹ 1,37,97,860	₹ 18,45,636	₹ 1,56,43,496

*The above chart is approximate and for illustration purpose only