

Monthly SWP Calculation For Mr Dummy

Current Age	40 Years
Target Monthly SWP	₹ 1,00,000
SIP Period	20 Years
Deferment Period	20 Years
SWP Period	20 Years
Balance Required	₹ 0

Accumulated Corpus Required

Scenario 1 @ 5.00 %	Scenario 2 @ 6.00 %
₹ 1,52,94,344	₹ 1,41,38,431

Monthly SIP Required

Scenario 1 @ 10.00 %	Scenario 2 @ 12.00 %
₹ 3,140	₹ 1,593

Total Withdrawal

₹ 2,40,00,000

Accumulation Phase Projected Annual Investment Value

Age	Scenario 1 @ 10.00 %		Scenario 2 @ 12.00 %	
	Annual Investment	Year End Value	Annual Investment	Year End Value
41	₹ 37,681	₹ 39,693	₹ 19,121	₹ 20,342
42	₹ 37,681	₹ 83,355	₹ 19,121	₹ 43,125
43	₹ 37,681	₹ 1,31,383	₹ 19,121	₹ 68,642
44	₹ 37,681	₹ 1,84,214	₹ 19,121	₹ 97,221
45	₹ 37,681	₹ 2,42,329	₹ 19,121	₹ 1,29,229
46	₹ 37,681	₹ 3,06,254	₹ 19,121	₹ 1,65,079
47	₹ 37,681	₹ 3,76,573	₹ 19,121	₹ 2,05,230
48	₹ 37,681	₹ 4,53,923	₹ 19,121	₹ 2,50,199
49	₹ 37,681	₹ 5,39,008	₹ 19,121	₹ 3,00,565
50	₹ 37,681	₹ 6,32,601	₹ 19,121	₹ 3,56,975
51	₹ 37,681	₹ 7,35,554	₹ 19,121	₹ 4,20,154
52	₹ 37,681	₹ 8,48,803	₹ 19,121	₹ 4,90,914
53	₹ 37,681	₹ 9,73,376	₹ 19,121	₹ 5,70,166
54	₹ 37,681	₹ 11,10,406	₹ 19,121	₹ 6,58,928
55	₹ 37,681	₹ 12,61,140	₹ 19,121	₹ 7,58,341
56	₹ 37,681	₹ 14,26,947	₹ 19,121	₹ 8,69,684
57	₹ 37,681	₹ 16,09,334	₹ 19,121	₹ 9,94,388
58	₹ 37,681	₹ 18,09,960	₹ 19,121	₹ 11,34,057
59	₹ 37,681	₹ 20,30,649	₹ 19,121	₹ 12,90,485
60	₹ 37,681	₹ 22,73,407	₹ 19,121	₹ 14,65,685
61	--	₹ 25,00,748	--	₹ 16,41,568
62	--	₹ 27,50,822	--	₹ 18,38,556
63	--	₹ 30,25,904	--	₹ 20,59,182
64	--	₹ 33,28,495	--	₹ 23,06,284
65	--	₹ 36,61,344	--	₹ 25,83,038

MFD Name

MFD Company Name

AMFI-Registered Mutual Fund Distributor

Email: mfdcompanyname@masterstrokeonline.com, M: 9876543210, Website: www.mfdcompanyname.com

Age	Scenario 1 @ 10.00 %		Scenario 2 @ 12.00 %	
	Annual Investment	Year End Value	Annual Investment	Year End Value
66	--	₹ 40,27,479	--	₹ 28,93,003
67	--	₹ 44,30,227	--	₹ 32,40,163
68	--	₹ 48,73,249	--	₹ 36,28,983
69	--	₹ 53,60,574	--	₹ 40,64,461
70	--	₹ 58,96,632	--	₹ 45,52,196
71	--	₹ 64,86,295	--	₹ 50,98,460
72	--	₹ 71,34,924	--	₹ 57,10,275
73	--	₹ 78,48,417	--	₹ 63,95,508
74	--	₹ 86,33,259	--	₹ 71,62,969
75	--	₹ 94,96,584	--	₹ 80,22,525
76	--	₹ 1,04,46,243	--	₹ 89,85,228
77	--	₹ 1,14,90,867	--	₹ 1,00,63,456
78	--	₹ 1,26,39,954	--	₹ 1,12,71,071
79	--	₹ 1,39,03,949	--	₹ 1,26,23,599
80	--	₹ 1,52,94,344	--	₹ 1,41,38,431

Distribution Phase Annual Withdrawal & Projected Investment Value

Age	Scenario 1 @ 5.00 %		Scenario 2 @ 6.00 %	
	Monthly SWP	Year End Balance	Monthly SWP	Year End Balance
81	₹ 1,00,000	₹ 1,48,31,804	₹ 1,00,000	₹ 1,37,54,084
82	₹ 1,00,000	₹ 1,43,46,136	₹ 1,00,000	₹ 1,33,46,676
83	₹ 1,00,000	₹ 1,38,36,185	₹ 1,00,000	₹ 1,29,14,824
84	₹ 1,00,000	₹ 1,33,00,737	₹ 1,00,000	₹ 1,24,57,060
85	₹ 1,00,000	₹ 1,27,38,516	₹ 1,00,000	₹ 1,19,71,831
86	₹ 1,00,000	₹ 1,21,48,184	₹ 1,00,000	₹ 1,14,57,488
87	₹ 1,00,000	₹ 1,15,28,335	₹ 1,00,000	₹ 1,09,12,285
88	₹ 1,00,000	₹ 1,08,77,494	₹ 1,00,000	₹ 1,03,34,369
89	₹ 1,00,000	₹ 1,01,94,111	₹ 1,00,000	₹ 97,21,778
90	₹ 1,00,000	₹ 94,76,559	₹ 1,00,000	₹ 90,72,432
91	₹ 1,00,000	₹ 87,23,129	₹ 1,00,000	₹ 83,84,125
92	₹ 1,00,000	₹ 79,32,028	₹ 1,00,000	₹ 76,54,520
93	₹ 1,00,000	₹ 71,01,372	₹ 1,00,000	₹ 68,81,138
94	₹ 1,00,000	₹ 62,29,182	₹ 1,00,000	₹ 60,61,354
95	₹ 1,00,000	₹ 53,13,384	₹ 1,00,000	₹ 51,92,382
96	₹ 1,00,000	₹ 43,51,795	₹ 1,00,000	₹ 42,71,272
97	₹ 1,00,000	₹ 33,42,127	₹ 1,00,000	₹ 32,94,896
98	₹ 1,00,000	₹ 22,81,976	₹ 1,00,000	₹ 22,59,937
99	₹ 1,00,000	₹ 11,68,817	₹ 1,00,000	₹ 11,62,880
100	₹ 1,00,000	₹ 0	₹ 1,00,000	₹ 0

*Returns are not guaranteed. The above is for illustration purpose only. Report Date : 03/08/2022