

Secure Your Financial Goals with

Goal-Based SIP + Term Insurance

Achieve Your Aspirations, With or Without Life's Uncertainties

How This Strategy Works?



Build Your
Wealth with SIP



Protect Your Goal
with Term Insurance

Purpose of Insurance - If anything unforeseen happens, the term insurance guarantees that your loved ones receive the full goal amount, securing their future.

Example for a 40 Year Old Male

- **Monthly Investment:** ₹10,000
 - **Expected Returns (XIRR):** 12%
 - **Goal Target:** ₹10,000,000
 - **Investment Period:** 20 Years
- **Sum Assured:** ₹10,000,000 – equivalent to your target
 - **Estimated Annual Premium:** ₹24,000/-

Age	Year	SIP Investment	SIP Investment + Premium Paid	Year end value of SIP Investment	Year end value of SIP Investment + Sum Assured in case of Death
41	1	₹ 1,20,000	₹ 1,44,000	₹ 1,28,093	₹ 1,01,28,093
42	2	₹ 2,40,000	₹ 2,88,000	₹ 2,72,432	₹ 1,02,72,432
43	3	₹ 3,60,000	₹ 4,32,000	₹ 4,35,076	₹ 1,04,35,076
44	4	₹ 4,80,000	₹ 5,76,000	₹ 6,18,348	₹ 1,06,18,348
45	5	₹ 6,00,000	₹ 7,20,000	₹ 8,24,864	₹ 1,08,24,864
46	6	₹ 7,20,000	₹ 8,64,000	₹ 10,57,570	₹ 1,10,57,570
47	7	₹ 8,40,000	₹ 10,08,000	₹ 13,19,790	₹ 1,13,19,790
48	8	₹ 9,60,000	₹ 11,52,000	₹ 16,15,266	₹ 1,16,15,266
49	9	₹ 10,80,000	₹ 12,96,000	₹ 19,48,215	₹ 1,19,48,215
50	10	₹ 12,00,000	₹ 14,40,000	₹ 23,23,391	₹ 1,23,23,391
51	11	₹ 13,20,000	₹ 15,84,000	₹ 27,46,148	₹ 1,27,46,148
52	12	₹ 14,40,000	₹ 17,28,000	₹ 32,22,522	₹ 1,32,22,522
53	13	₹ 15,60,000	₹ 18,72,000	₹ 37,59,311	₹ 1,37,59,311
54	14	₹ 16,80,000	₹ 20,16,000	₹ 43,64,180	₹ 1,43,64,180
55	15	₹ 18,00,000	₹ 21,60,000	₹ 50,45,760	₹ 1,50,45,760
56	16	₹ 19,20,000	₹ 23,04,000	₹ 58,13,782	₹ 1,58,13,782
57	17	₹ 20,40,000	₹ 24,48,000	₹ 66,79,208	₹ 1,66,79,208
58	18	₹ 21,60,000	₹ 25,92,000	₹ 76,54,392	₹ 1,76,54,392
59	19	₹ 22,80,000	₹ 27,36,000	₹ 87,53,254	₹ 1,87,53,254
60	20	₹ 24,00,000	₹ 28,80,000	₹ 99,91,479	₹ 1,99,91,479

Speak to your Mutual Fund Distributor today to learn how to get started!