01

SYSTEMATIC INVESTMENT PLAN (SIP)

A Smart Approach to Wealth Creation

Mutual Fund Distributor

YOUR FUTURE NEEDS MORE THAN JUST SAVINGS. IT NEEDS A SYSTEM.



Life keeps getting more expensive.
Goals keep getting bigger.
But building wealth doesn't necessarily require a huge amount at once.

CHOOSE AN AMOUNT THAT FITS. INVEST REGULARLY. GIVE IT TIME.

THAT'S THE IDEA BEHIND A SIP.

A Systematic Investment Plan helps you invest a fixed amount at regular intervals into a mutual fund scheme.

WHY SIP?

Small Start

Begin with an amount that fits your cash flow.

Regular Habit

Automate investing instead of relying on willpower.

Time Advantage

Give your investments more time to potentially compound.

Market Participation

Continue investing across different market conditions.

Step Up

Increase your SIP as your income grows.

**A SIP IS NOT ABOUT PREDICTING EVERY MARKET MOVE.
IT'S ABOUT INVESTING REGULARLY THROUGH MARKET CYCLES.**

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02 THE POWER OF TIME

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A SIP WITH AFFORDABLE CONTRIBUTIONS CAN LOOK VERY DIFFERENT OVER TIME.

₹10,000 MONTHLY SIP

Assumed Return – 12%

Investment Period (Yrs)	5	10	15	20	25
Amount Invested	₹6.00 Lakh	₹12.00 Lakh	₹18.00 Lakh	₹24.00 Lakh	₹30.00 Lakh
Potential Value*	₹8.11 Lakh	₹22.40 Lakh	₹47.59 Lakh	₹91.99 Lakh	₹1.70 Crore

THE LONGER THE JOURNEY, THE MORE IMPORTANT COMPOUNDING CAN BECOME.



DON'T JUST ASK:
"How much can I invest every month?"

ALSO ASK:
"How long can I stay invested?"

*Illustrative values based on assumed return. Actual returns are market-linked and may vary.

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03 WHAT THE MARKET CAN LOOK LIKE

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SIP DOESN'T REMOVE MARKET RISK. IT CHANGES HOW YOU APPROACH IT.

Markets can move:

UP

DOWN

SIDEWAYS



A SIP continues through these market cycles.

Past Performance of ₹10,000 Monthly SIPs in Selected Schemes

(Performance Date – 01/10/2026)

Scheme	5Y	10Y	15Y	20Y	25Y
Total Amount Invested	₹6.00 Lakh	₹12.00 Lakh	₹18.00 Lakh	₹24.00 Lakh	₹30.00 Lakh
Nippon India Vision Large & Mid Cap Fund	₹7.85 Lakh	₹23.90 Lakh	₹51.53 Lakh	₹92.36 Lakh	₹3.06 Crore
HDFC Flexi Cap Fund	₹8.27 Lakh	₹27.36 Lakh	₹63.00 Lakh	₹1.29 Crore	₹4.51 Crore
SBI Large & Midcap Fund	₹7.67 Lakh	₹24.85 Lakh	₹60.28 Lakh	₹1.20 Crore	₹4.20 Crore
Tata Large & Mid Cap Fund	₹6.77 Lakh	₹20.86 Lakh	₹48.16 Lakh	₹92.03 Lakh	₹2.94 Crore
Quant Small Cap Fund	₹8.05 Lakh	₹43.09 Lakh	₹89.35 Lakh	₹1.68 Crore	₹3.44 Crore

THE LESSON ISN'T TO CHASE THE HIGHEST NUMBER.
IT'S TO STAY INVESTED FOR THE JOURNEY YOU HAVE CHOSEN.

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04 THE INVESTOR'S DECISION

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BEFORE STARTING A SIP, KNOW YOUR BASICS.

01

YOUR GOAL

What are you investing for?

Education | Retirement | Home | Wealth Creation | Financial Freedom

02

YOUR TIME HORIZON

How long can you stay invested?

Longer horizon → More time for compounding.

03

YOUR SIP CONTRIBUTION

How much can you invest comfortably and consistently?

₹10K | ₹25K | ₹50K | ₹1L+

THE RIGHT SIP ISN'T THE BIGGEST SIP. IT'S THE ONE YOU CAN STAY WITH.



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IMPORTANT DISCLOSURE & DISCLAIMER

GENERAL INFORMATION

This presentation is for educational and investor-awareness purposes only and should not be construed as investment advice, recommendation, solicitation or an offer to buy or sell any security or mutual fund scheme. The information is general in nature and does not consider individual investment objectives, financial circumstances, risk profile, investment horizon or suitability.

PAGE 2 – HYPOTHETICAL ILLUSTRATIONS

The values on **Page 2** are hypothetical illustrations based on the stated investment amount, period and assumed return, solely to demonstrate the potential effect of time and compounding. The assumed return is neither assured nor guaranteed, and actual outcomes may vary.

PAGE 3 – HISTORICAL PERFORMANCE

The values on **Page 3** are based on historical scheme performance for the stated periods and are provided for illustrative comparison only. Past performance is not indicative of future results and should not be construed as a projection, forecast or recommendation to invest in any particular scheme. Actual returns may differ due to market conditions and other factors.

RISK DISCLOSURE

SIP does not eliminate market risk, assure returns or protect against losses. The ability to remain invested for the long term does not guarantee a positive outcome.

SUITABILITY AND SCHEME DOCUMENTS

Investors should assess suitability and carefully read the applicable scheme-related documents, including the Scheme Information Document (SID), Statement of Additional Information (SAI) and Key Information Memorandum (KIM), before investing.

Mutual Fund investments are subject to market risks. Read all scheme-related documents carefully.

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