Mutual Fund Distributor

SIP Today. SWP Tomorrow.

Proposal in Brief

It is important to have a secure financial future and a stress free retirement. As time passes, the goal looks challenging.

Proposing to you, SIP Today, SWP Tomorrow: Invest small sums today, enjoy the fruits during retirement.

SIP helps create wealth over the long term. It allows the investor to invest small amounts at regular intervals and these small amounts reduce the impact of volatility in the short term. Historical evidence suggest that returns in equity markets are decent over medium to long term.

SWPs are the opposite of SIP. A fixed amount is transferred from your mutual fund portfolio to your bank account on a periodic basis. This acts as sort of pension where regular cash flows help meet expenses during retirement.



SRINIVASA B H
S & V Capital
AMFI-Registered Mutual Fund Distributor | ARN-78362
svcapital2002@gmail.com 9141580262 SANDVCAPITAL.investorcorner.co.in

Mutual Fund Distributor

Monthly SIP : Rs. 7500

Investment	
Current Age	**30**
Monthly SIP Amount	**₹ 7,500**
SIP Till Age	**60**
SIP Period	30
Total Investment Made	₹ 27,00,000
Assumed return on SIP	12%
Accumulated Corpus at Age 60	**₹ 2,30,00,000**

Monthly Withdrawal : Rs. 1,50,000

Withdrawals	
Monthly Withdrawal Start Age	**60**
Monthly Withdrawal Till Age	**80**
Period of Withdrawal	20
Assumed Return on SWP	8%
Monthly Withdrawal Amount	**₹ 1,50,000**
Total Withdrawal	₹ 3,60,00,000
Corpus left at age 80	**₹2,30,00,000**

Monthly SIP : Rs. 25,000

Investment	
Current Age	**40**
Monthly SIP Amount	**₹25,000**
SIP Till Age	**60**
SIP Period	20
Total Investment Made	₹60,00,000
Assumed return on SIP	12%
Accumulated Corpus at Age 60	**₹2,30,00,000**

Monthly Withdrawal : Rs. 1,50,000

Withdrawals	
Monthly Withdrawal Start Age	**60**
Monthly Withdrawal Till Age	**80**
Period of Withdrawal	20
Assumed Return on SWP	8%
Monthly Withdrawal Amount	**₹1,50,000**
Total Withdrawal	₹3,60,00,000
Corpus left at age 80	**₹2,30,00,000**

*The above data and charts are purely for illustrations purpose. Figures are approximate. SWP is a process, not a guaranteed product. Actual Investment experience may differ. Any assumption of returns shown in the calculation above should not be construed as indicative/expected returns from any specific mutual fund scheme. Contact us for scheme-specific risk. Returns are not guaranteed. Past performance is not an indication of future returns. Mutual funds investments are subject to market risk. Please read the offer documents carefully before investing

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Monthly SIP : Rs. 50,000

Investment	
Current Age	**45**
Monthly SIP Amount	**₹ 50,000**
SIP Till Age	**60**
SIP Period	15
Total Investment Made	₹ 90,00,000
Assumed return on SIP	12%
Accumulated Corpus at Age 60	**₹ 2,30,00,000**

Monthly Withdrawal : Rs. 1,50,000

Withdrawals	
Monthly Withdrawal Start Age	**60**
Monthly Withdrawal Till Age	**80**
Period of Withdrawal	20
Assumed Return on SWP	8%
Monthly Withdrawal Amount	**₹ 1,50,000**
Total Withdrawal	₹ 3,60,00,000
Corpus left at age 80	**₹2,30,00,000**

Monthly SIP : Rs. 1,00,000

Investment	
Current Age	**50**
Monthly SIP Amount	**₹1,00,000**
SIP Till Age	**60**
SIP Period	10
Total Investment Made	₹1,20,00,000
Assumed return on SIP	12%
Accumulated Corpus at Age 60	**₹2,30,00,000**

Monthly Withdrawal : Rs. 1,50,000

Withdrawals	
Monthly Withdrawal Start Age	**60**
Monthly Withdrawal Till Age	**80**
Period of Withdrawal	20
Assumed Return on SWP	8%
Monthly Withdrawal Amount	**₹1,50,000**
Total Withdrawal	₹3,60,00,000
Corpus left at age 80	**₹2,30,00,000**

*The above data and charts are purely for illustrations purpose. Figures are approximate. SWP is a process, not a guaranteed product. Actual Investment experience may differ. Any assumption of returns shown in the calculation above should not be construed as indicative/expected returns from any specific mutual fund scheme. Contact us for scheme-specific risk. Returns are not guaranteed. Past performance is not an indication of future returns. Mutual funds investments are subject to market risk. Please read the offer documents carefully before investing

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