Mutual Fund
Distributor

ENHANCE YOUR WEALTH
SMART STRATEGIES FOR ₹1 BILLION





Becoming a billionaire is a dream many of us harbour, but only a few take the actionable steps to realise it. Achieving this dream can follow two distinct paths: working hard for money or letting money work hard for you. **The latter might sound easier, so let's delve into it.**



We're all familiar with Systematic Investment Plans (SIPs), a remarkable investment tool that transforms our monthly savings into investments in Mutual Fund units. These units offer compounding returns in the long term, potentially propelling you towards a billionaire (Indian Rupee) status. Here, we'll explore a few SIP strategies that could pave the way to becoming a billionaire in the long run.

STRATEGY – 1 (LIMITED PERIOD SIP)



Many of us don't want to commit monthly investments for a long period. This is because of the uncertainties of the future income generation. The idea of limited period SIP is to start an SIP with a tenure aligned with our income-generating years and hold the investments thereafter. Even if we contribute a modest amount, this strategy can help us reach the coveted 1 billion target for ourselves or our children.

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CURRENT AGE	TARGET AMOUNT REQUIRED AT AGE	SIP PERIOD	DEFERMENT PERIOD	SIP REQUIRED
0	60	20	40	₹7,252
5	60	20	35	₹13,361
10	60	20	30	₹24,618
15	60	20	25	₹45,356
20	60	20	20	₹83,566
25	60	20	15	₹1,53,965
30	60	20	10	₹2,83,671
35	60	20	5	₹5,22,646

Assumed Return - 13%

In the table provided, you can see the monthly SIP amount needed for 20 years to achieve 1 billion target by age 60, taking into account various ages, deferment periods, and assumed annual returns of 13%.

STRATEGY 2 (STEP-UP SIP)



Our income tends to grow over time, and our monthly savings can follow suit. With this strategy, we can begin with a comfortable SIP amount of our choice and gradually increase the contributions as our income rises, eventually reaching the target of 1 billion

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SIP PERIOD (YRS)	FLAT SIP REQUIRED	STEP-UP SIP WITH 5% ANNUAL INCREASE	STEP-UP SIP WITH 8% ANNUAL INCREASE
10	₹42,31,709	₹35,31,663	₹31,54,109
15	₹19,28,548	₹14,93,473	₹12,64,511
20	₹9,62,941	₹7,03,034	₹5,67,951
25	₹5,00,882	₹3,49,456	₹2,70,987
30	₹2,65,850	₹1,79,220	₹1,34,145
35	₹1,42,582	₹93,697	₹68,037
40	₹76,893	₹49,592	₹35,093
45	₹41,590	₹26,461	₹18,321
50	₹22,531	₹14,196	₹9,651
55	₹12,217	₹7,644	₹5,118
60	₹6,627	₹4,126	₹2,728

Assumed Return -13%

The table provides the monthly SIP amount required to achieve the target 1 billion, with both flat and Step-Up SIP amounts (Assuming 13% return, 5% and 8% yearly Increase), over various SIP periods ranging from 10 to 60 years.





So, why wait? Start your SIP journey now and embark on the path to financial prosperity. With consistent efforts and smart investments, you can turn your dreams of wealth into a reality. Remember, it's not about how much you earn; it's about how wisely you invest. Your financial future begins with that first step - start your SIP today and inch closer to that remarkable 1 billion milestone

Disclaimer: Mutual Fund investments are subject to market risks. Please read the scheme related documents carefully before investing. Returns are not guaranteed. The provided chart is an illustrative tool and it is essential to note that real-world circumstances may cause variations from these projected figures.

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