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Testimony of a Financial Planner

#ShuruaatSIPse

SIP

Systematic Investment Plan

Your building blocks to wealth creation

AXIS MUTUAL FUND



We all have dreams...dreams that become our Financial Goals

And to achieve these goals, one needs a fair amount of money



House



Children's
Higher Education



Vehicle



World Trip



Wealth
Creation



Retirement



Costs keep changing with time; what costs a certain amount today
will most definitely cost more tomorrow!

Conventional Courses

Engineer

Medicine

MBA (domestic)

Architect

Cost Today (approx)

12 lacs

70 lacs

10 lacs

10 lacs

Cost after 10 years (approx)

23.6 lacs

1.4 crores

19.7 lacs

19.7 lacs

Education is one of the most important goals for any parent

There are a variety of educational courses available, and good-quality education comes at a price

Inflation rounded off to 7%. Source : collegedekho.com, bschoolcareers360.com, shiksh.com,
For medicines – private colleges considered, Generally considered average of 4 – 5 colleges for respective courses.



The Moot Question



How does one accumulate
enough money
to achieve these goals?





The Good News ...

Big things
often have
SMALL beginnings



A small **SHURUAAT**
today can lead you
to your goals.

What is SIP?

SIP is Systematic Investment Plan

Ideal for New Investors

Helps investors achieve their financial goals over a period of time

Investor invests a fixed amount every month in mutual fund



SIP Advantages

1

Light on the Pocket

Investors can start SIP with a minimum of ₹100 per month.

2

Financial Discipline

SIP helps investors imbibe discipline in investments as each month the money would get invested automatically

3

Rupee Cost Averaging

Get more mutual fund units when markets fall & buy less when markets rise

4

Power of Compounding

SIP done over long periods of time helps investors realize the power of compounding



Power of Compounding

Investing a fixed amount regularly in equity mutual funds can have a significant impact on wealth creation due to compounding effect.

No. of years Invested	5	10	15	20	25
Date of Investment	30 th September 2018	30 th September 2013	30 th September 2008	30 th September 2003	30 th September 1998
SIP Amount (per month)	5,000	5,000	5,000	5,000	5,000
Amount Invested	3,00,000	6,00,000	9,00,000	12,00,000	15,00,000
Benchmark Return BSE Sensex TRI (%)	14.0	14.5	13.02	16.0	14.8
Corpus Accumulated at the end of tenure	4,36,004	13,51,121	27,78,406	87,47,304	1,58,17,940

Source: BSE Sensex.

Returns are CAGR returns of BSE Sensex Total Return Index over the respective periods **Past performance may or may not be sustained in future.**

Disclaimer

This is an investor education and awareness initiative by Axis Mutual Fund. Investors have to complete one-time KYC process. Visit www.axismf.com or contact us on customerservice@axismf.com for more information. Investors should deal only with registered Mutual Funds, details of which are available on www.sebi.gov.in - Intermediaries/Market Infrastructure Institutions section. For any grievance redressal, investors can call us on 1800 221 322 or write us at customerservice@axismf.com or register complaint on SEBI Scores portal at <https://scores.gov.in>

Statutory Details Axis Mutual Fund has been established as a Trust under the Indian Trusts Act, 1882, sponsored by Axis Bank Ltd. (liability restricted & Idakh), **Trustee**: Axis Mutual Fund Trustee Ltd. **Investment Manager**: Axis Asset Management Co. Ltd. (the AMC) **Risk Factors**: Axis Bank Ltd. is not liable or responsible for any loss or shortfall resulting from the operation of the schemes.

Mutual Fund investments are subject to market risks, read all scheme related documents carefully.