

Introducing

Aatmanirbhar

— SIP —

Aims to make you Aatmanirbhar to live the life you deserve

Systematic Investment Plan



Illustration to explain concept of Aatmanirbhar SIP

Simran began her journey towards financial independence in 2003 with a monthly SIP of ₹ 30,000 in Nifty 500 TRI benchmark. She stayed invested for **10 years** consistently, irrespective of market conditions and accumulated a corpus of approx ₹ 68 Lakh.



SIP

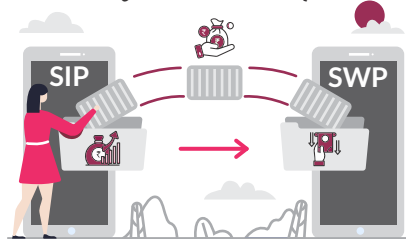
Simran chose a
SIP tenure of 10 years



SWP

Simran decided to go with SWP because it would provide her with **passive income** while still leaving her with available funds.

Corpus transferred to a Hybrid Plan



| | |
|----------------------------|------------|
| Investing Since | 01/04/2003 |
| SIP Per month | 30,000 |
| Investing Period (Yrs) | 10 |
| Invested Amount | 36,00,000 |
| Market Value (Apr 1, 2013) | 68,87,718 |
| SIP Returns (% XIRR) | 12.40% |

| | |
|-------------------------------------------------|-------------|
| Withdrawal since | 01/04/2013 |
| Monthly Payout | 30,000 |
| Market value at the start of withdrawal | 68,87,718 |
| SWP period (Yrs) | 10 |
| Total Money Withdrawn | 36,00,000 |
| Balance corpus after 10 years of monthly payout | 1,44,03,464 |

Source: Bloomberg/axismf research. Data as on: 30th May, 2023.

Past performance may or may not be sustained in future. The calculation is a historical calculation of a hypothetical ₹ 30000 monthly SIP initiated on 01/04/2003 for 10 years. Upon completion the corpus is transferred via switch to NIFTY 50 Hybrid Composite Debt 65:35 Index with a subsequent systematic withdrawal of ₹ 30000 for the next 10 years. Value at the end of the period as of 30th April 2023. Expenses for the execution, maintenance of the fund and taxation have been ignored in this calculation.

The above calculations are only for illustration purposes and are subject to market risks based on corpus at the end of the investment period, actual market returns and periodicity of cash flows. This feature does not in any way give assurance of the performance of any of the Schemes of Axis Mutual Fund or provide any guarantee of withdrawals through SWP mode. Investors are advised to consult their investment / tax advisors before investing.