



SIP BREWERY - ELSS Investment Report

Tax-Saving ELSS Funds with Lock-in Analysis



ELSS Portfolio Summary

₹2,50,000

Total Invested

₹2,85,250

Current Value

₹35,250

Total Gains

14.1%

Overall Return



ELSS Holdings Details

Fund Name	Investment Date	Lock-in Expiry	Invested Amount	Current Value	Gains	Return %	Remaining Lock-in
Axis Long Term Equity Fund - Direct Growth <small>Axis Mutual Fund</small>	2023-04-15	2026-04-15	₹50,000	₹58,500	₹8,500	17%	1 year 8 months
Mirae Asset Tax Saver Fund - Direct Growth <small>Mirae Asset MF</small>	2023-06-20	2026-06-20	₹75,000	₹82,500	₹7,500	10%	1 year 10 months
HDFC TaxSaver Fund - Direct Growth <small>HDFC Mutual Fund</small>	2022-12-10	2025-12-10	₹1,00,000	₹1,18,000	₹18,000	18%	10 months
SBI Long Term Equity Fund - Direct Growth <small>SBI Mutual Fund</small>	2024-01-31	2027-01-31	₹25,000	₹26,250	₹1,250	5%	2 years 5 months



Lock-in Timeline



Axis Long Term Equity Fund

Lock-in expires: 2026-04-15 (1 year 8 months remaining)

Locked

● **Mirae Asset Tax Saver Fund**
Lock-in expires: 2026-06-20 (1 year 10 months remaining)

Locked

● **HDFC TaxSaver Fund**
Lock-in expires: 2025-12-10 (10 months remaining)

Available Soon

● **SBI Long Term Equity Fund**
Lock-in expires: 2027-01-31 (2 years 5 months remaining)

Locked

Section 80C Tax Benefits

₹2,50,000
80C Utilized

₹-1,00,000
80C Remaining

₹77,500
Tax Saved (31%)

ELSS Investment Insights

 Invest ₹-1,00,000 more to fully utilize 80C benefits and save ₹-31,000 in taxes

 HDFC TaxSaver Fund will be available for redemption in 10 months

 Your ELSS portfolio is outperforming with 14.1% returns

 Plan systematic investments before March 31st to maximize tax benefits