

SIP ANALYSIS REPORT

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SIP ANALYSIS

Systematic Investment Plan (SIP) helps in rupee cost averaging and disciplined investing. Your current SIP portfolio shows consistent growth across different market cycles.

₹23,000

MONTHLY SIP

5

ACTIVE SIPs

16.8%

XIRR

12

MONTHS ACTIVE

SIP DETAILS

| FUND NAME | SIP AMOUNT | SIP DATE | TOTAL INVESTED | CURRENT VALUE | GAINS | RETURNS % |
|---|------------|---------------------|----------------|---------------|---------|-----------|
| HDFC Top 100 Fund - Direct Growth | ₹5,000 | 15th of every month | ₹85,000 | ₹1,00,125 | ₹15,125 | 17.8% |
| SBI Blue Chip Fund - Direct Growth | ₹5,000 | 15th of every month | ₹90,000 | ₹1,00,185 | ₹10,185 | 11.3% |
| ICICI Prudential Value Discovery Fund - Direct Growth | ₹4,000 | 1st of every month | ₹80,000 | ₹1,00,200 | ₹20,200 | 25.3% |
| Kotak Small Cap Fund - Direct Growth | ₹3,000 | 10th of every month | ₹95,000 | ₹1,00,175 | ₹5,175 | 5.4% |
| HDFC Hybrid Equity Fund - Direct Growth | ₹6,000 | 25th of every month | ₹1,00,000 | ₹1,00,225 | ₹225 | 0.2% |