

Returns of Mr. A & family	as on 26/06/2026	Case 1
---------------------------	------------------	--------

These are actual investment of my client. Investor & fund names have been concealed under privacy policy.

S No.		Folio no.	Lump sum Investment		SIP Investment			Grand Total (Lump sum + SIP investment) (5 + 8)	Less Withdrawal	Nett Investment (9 - 10)	Current value	Remarks	Nett gain (Rs.) (12 - 11)	Total Gain (Rs) (10 + 14)
			Amount	Total	Monthly Amount	Months invested	Total Invested (6 x 7)							
			4	5	6	7	8	9	10	11	12	13	14	
1.		1037769351	1,050,000	1,050,000	0	0	0	1,050,000	210,000	840,000	1,640,619	10,000 monthly withdrawal	800,619	1,010,619
2.		5499987	1,50,000 + 3,50,000	500,000	0	0	0	500,000	0	500,000	914,751	Tax saving	414,751	414,751
3.		8093185	1,353,000	1,353,000	0	0	0	1,353,000	600,000	753,000	3,191,224	20,000 monthly withdrawal	2,438,224	3,038,224
	Totals							2,903,000	810,000	2,093,000	5,746,594		3,653,594	4,463,594
1.		1041226316	800,000	800,000	0	0	0	800,000	0	800,000	1,203,890		403,890	403,890
2.		80389582	15000 + 15000 + 400000	430,000	15,000	56	840,000	1,270,000	0	1,270,000	2,175,039		905,039	905,039
	Totals							2,070,000	0	2,070,000	3,378,929		1,308,929	1,308,929
1.		1037769341	300,000	300,000	0	0	0	300,000	0	300,000	655,240		355,240	355,240
	Totals										655,240		655,240	655,240
	Grand Total							4,973,000	810,000	4,163,000	9,780,763		5,617,763	6,427,763

	Invest date
	01/02/2016
	12/09/2023

First

Last

Wthdrawing 30,000 per month