



**Meta
Investment**

Your Investment and Insurance Companion

New Tranche of
Sovereign Gold Bonds

AIM TO BUILD WEALTH WITH SYSTEMATIC INVESTMENT PLAN (SIP)

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What are MUTUAL FUNDS ?



- A mutual fund is an investment vehicle made up of a pool of money collected from investors.
- The fund manager then invests the accumulated money in various securities depending on the nature of funds
- These funds then generate returns which add value to the principal amount
- These generated returns are then distributed among the investors.

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Why Do People Invest in Mutual Funds?

- ✓ **INCREASED DIVERSIFICATION:**
Based on scheme's objective a mutual fund scheme can have proportionate exposure to various financial instruments like equities, debt, or other asset classes such as gold, real estate, etc.
- ✓ **INVESTMENT FLEXIBILITY:**
One can choose to invest a lumpsum amount or smaller amount through SIP
- ✓ **INCOME TAX BENEFITS:**
One can invest 1,50,000 IN Equity Linked Saving Scheme and deduce the same from your taxable income.
- ✓ **PROFESSIONAL MANAGEMENT :**
Mutual Fund schemes are managed by professional fund managers who closely watch the markets and make constant investment decision based on fund's stated objective
- ✓ **REGULATED:**
Securities and Exchange Board of India (SEBI) regulates the Mutual Fund market. Mutual funds have to strictly comply with SEBI (Mutual Funds) Regulations, 1996, to ensure transparency and protection of investors' wealth.
- ✓ **HIGH LIQUIDITY:**
You can buy sell mutual fund units simply by transacting online. It's a simple process to be followed.
- ✓ **LOW ENTRY LEVEL:**
You can start making investments as low as INR 500 with the help of SIPs.



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SIP - AN ULTIMATE INVESTMENT VEHICLE

Invest Fixed Amount At Fixed Intervals To Achieve Potential Long Term Benefits

Aim to create wealth with just investing
INR 10,000/- Per Month

Investment Period	Wealth Created
10 Years	23 Lakh
15 Years	49.95 Lakh
20 Years	98.92 Lakh
25 Years	1.88 Crore
30 Years	3.50 Crore

** Assumed monthly SIP of 10,000 invested in an equity mutual fund at CAGR of 12%

** The above graph is used to explain concept and is for illustration purpose only. The SIP amount, tenure of SIP and expected rate of return are assumed figures for the purpose of explaining the concept of advantages of SIP investment. The actual result may vary from depicted results depending on the scheme selected

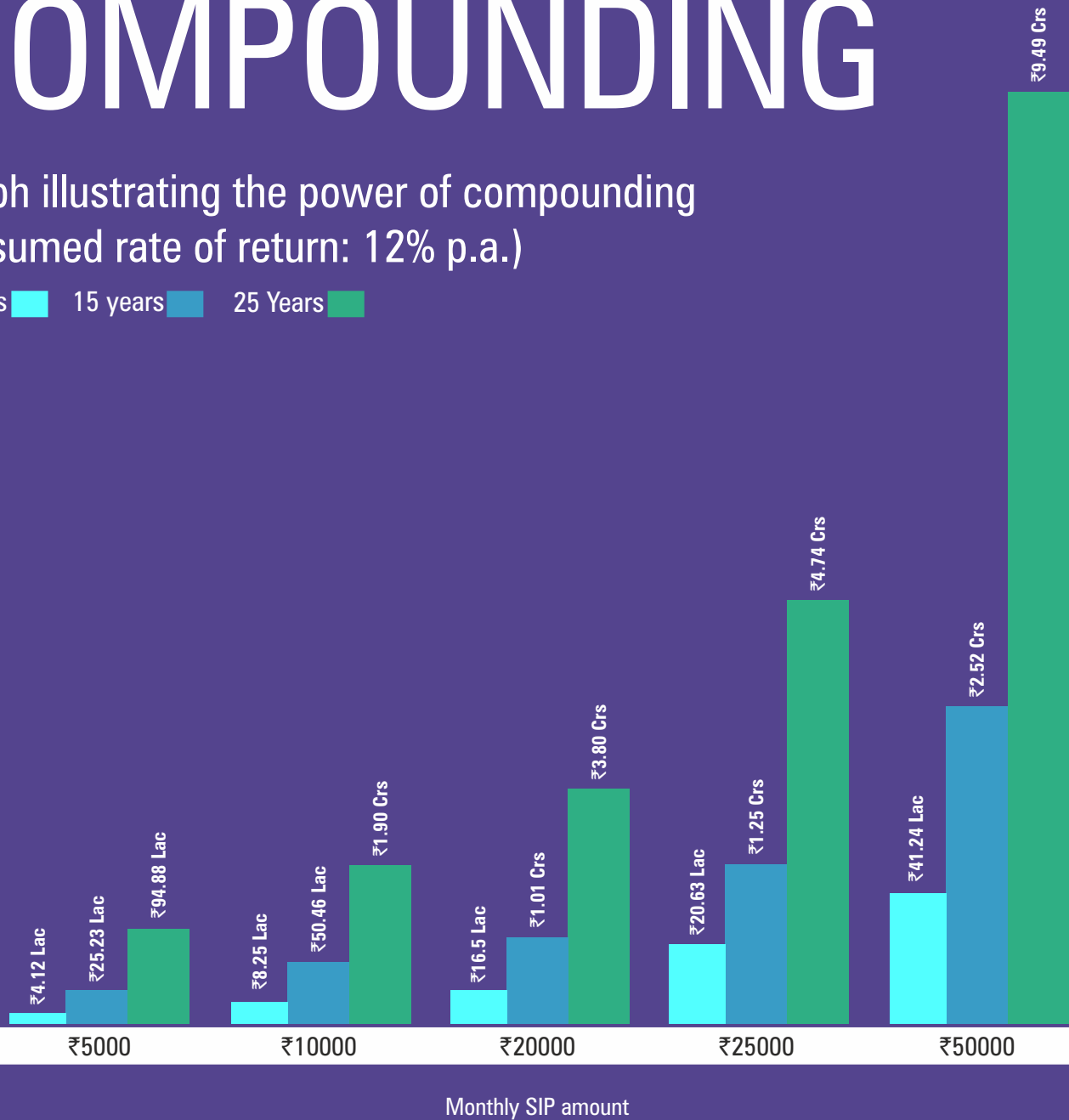
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Magic of Power of COMPOUNDING

Graph illustrating the power of compounding
(Assumed rate of return: 12% p.a.)

5 years 15 years 25 Years



Source: <https://www.amfiindia.com>

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For illustration purposes only. The above table indicates the importance of "power of compounding" by starting to invest early. Returns for both the scenarios have been considered to be 15% p.a. over the long term investment periods of 20 years and 10 years respectively. Inflation has not been considered. Actual results may vary.

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THINK BIG START SMALL

START AN SIP FOR 20 YEARS



** The above figures are calculated at the rate of 12% p.a. for illustration purpose only. The actual result may vary from depicted results depending on the scheme selected.

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INDIA IS GOING THE SIP WAY ARE YOU?

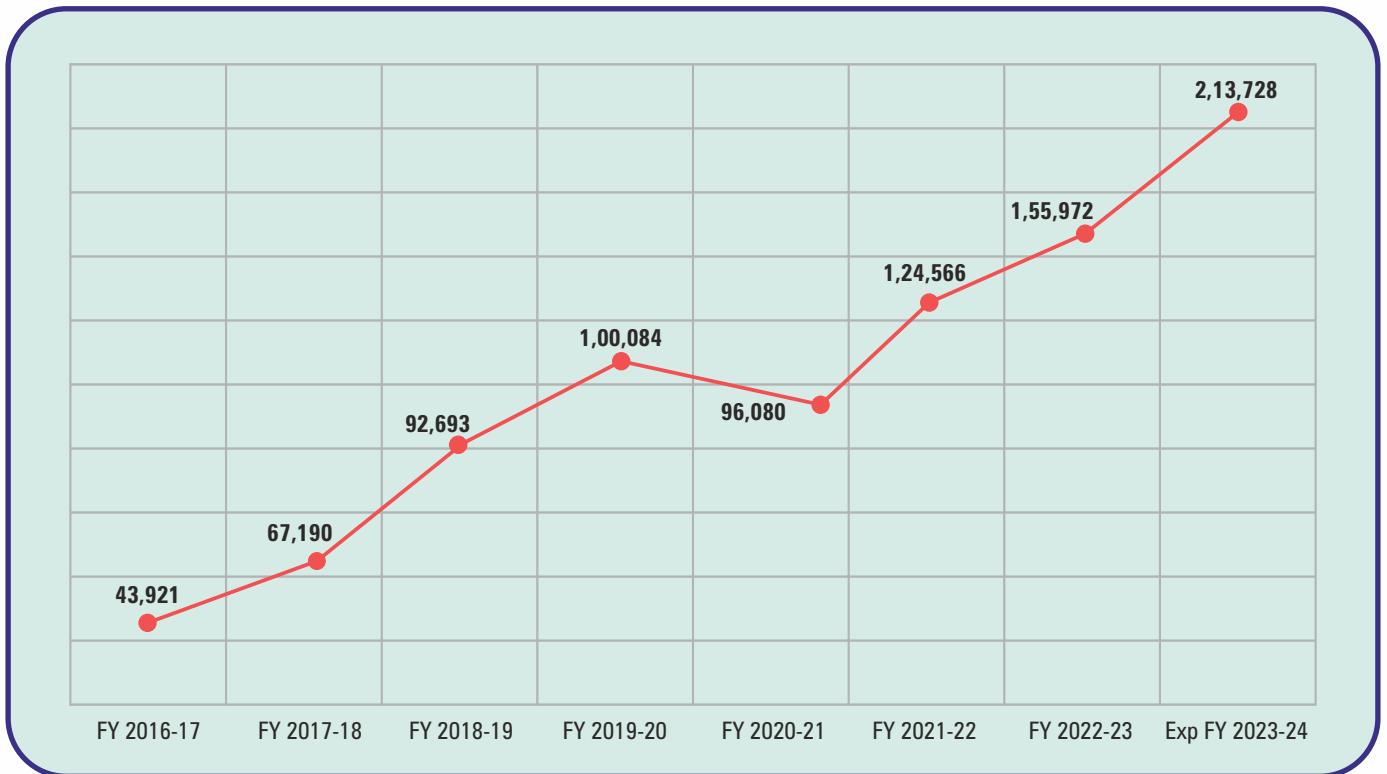


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SIP GROWTH

SIP has been gaining popularity amongst Indian investors



Source: <https://www.amfiindia.com>

Assets managed by Indian mutual fund industry has increased from INR 38.89 trillion in April 2022 to INR 41.53 Trillion in April 2023.



** Assets are measured as average assets for the month Rs. Trillion is equivalent to Rs. Lac Cr.

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Understanding **Sovereign Gold Bond**

Sovereign Gold Bonds (SGBs) are government securities denominated in grams of gold. These bonds are issued by the Reserve Bank of India (RBI) on behalf of the Government of India. SGBs offer investors the opportunity to invest in gold without the need for physical ownership. The bonds have a tenure of 8 years and carry an annual interest rate payable semi-annually. SGBs are denominated in multiples of gram(s) of gold with a basic unit of one gram. An individual can subscribe for SGBs up to 4 Kg in a financial year. This 4 Kg limit is applicable for purchase of SGBs from secondary market (stock exchange) as well.

We are delighted to announce the next batch of Sovereign Gold Bond is up for grabs from September 11th to September 15th.

Connect today to know more.

Benefits of Investing in SGBs

Safety and Security:

SGBs are backed by the Government of India, providing a high level of safety and security to investors.

No Storage Hassles:

Unlike physical gold, SGBs eliminate the need for storage and security concerns.

Regular Income:

SGBs offer a fixed annual interest rate of 2.5%, providing investors with a regular income stream in addition to potential capital appreciation.

Capital Appreciation:

SGBs track the market price of gold, allowing investors to benefit from price appreciation.

Tax Efficiency:

Long-term capital gains on SGBs are tax-exempt if held until maturity. Also, the indexation benefits will be provided to long term capital gains arising to any person on transfer of the SGB.

Collateral:

The SGBs can be used as collateral for loans. The loan-to-value (LTV) ratio will be as applicable to any ordinary gold loan, mandated by the Reserve Bank from time to time.

**RICH DON'T WORK FOR MONEY
MONEY WORK FOR THEM**



To Get Your Money Work For You



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Want to know more about
How SIP in Mutual Funds
can help you Build
Wealth.



Get in Touch with us Today



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