Traditional Tax Saving Avenues v/s HDFC TaxSaver

How an annual investment of Rs 10,000 in March every year since 1996 would have performed up to March 31, 2018

Period Ended	Investment Value in PPF	Investment value in NIFTY 500	Investment value in HDFC Tax Saver $$
Mar-96	10,000	10,000	10,000
Mar-97	21,200	19,200	19,040
Mar-98	33,744	32,182	36,117
Mar-99	47,793	44,806	77,548
Mar-00	63,429	89,406	218,757
Mar-01	80,309	61,419	148,952
Mar-02	97,884	74,930	198,180
Mar-03	116,589	80,009	196,005
Mar-04	135,916	181,521	431,906
Mar-05	156,790	236,319	737,210
Mar-06	179,333	405,286	1,441,981
Mar-07	203,680	455,811	1,481,200
Mar-08	229,974	570,129	1,691,869
Mar-09	258,372	357,170	1,090,239
Mar-10	289,042	688,710	2,320,244
Mar-11	322,165	756,240	2,637,401
Mar-12	358,508	707,636	2,535,170
Mar-13	400,057	762,907	2,571,705
Mar-14	444,862	919,220	3,169,066
Mar-15	493,565	1,250,384	4,568,631
Mar-16	536,505	1,178,490	4,072,190
Mar-17	590,963	1,489,331	5,404,741
Mar-18	646,910	1,690,954	5,775,254

Annual investment of Rs 10,000 in March every year since 1996 in HDFC Tax Saver would have resulted in an investment value of Rs 57.75 lacs.

Similar investment in PPF would have resulted in an investment value of Rs 6.5 lacs

Past performance may or may not be sustained in future.

Source: Bloomberg and other publicly available information. The above simulation is for illustration purpose only. Year end balance has been arrived at by adding interest at the rates notified by the Competent authorities from time to time. # Benchmark Index of HDFC TaxSaver. $$ All dividends declared prior to the splitting of the Scheme into Dividend & Growth Options are assumed to be reinvested in the units of the Scheme at the then prevailing NAV (ex-dividend NAV). Unlike PPF, investments in Mutual Funds are subject to market risks. Hence, the performances are not strictly comparable. As Nifty 500 TRI data is not available for March 31, 96, benchmark performance is calculated from March 29, 96 For complete performance, please refer slide 17.