

Reference Sheet to initiate discussion with client (For Private Circulation Only)



Investor's Age Bracket
20-30 Years



Normal SIP/
Step Up SIP



Limited Period
SIP



Lumpsum Investments
in Mutual Funds



Systematic
Transfer Plan (STP)



SIP Today
SWP Tomorrow



MF Schemes
aimed at Children



Term
Insurance



Health
Insurance



NPS -
Individual



Sukanya
Samridhi Yojana



Sovereign Gold
Bond (SGB)

Reference Sheet to initiate discussion with client (For Private Circulation Only)



Investor's Age Bracket **30-40 Years**



Normal SIP/
Step Up SIP



Limited Period
SIP



Lumpsum Investments
in Mutual Funds



Systematic
Transfer Plan (STP)



SIP Today
SWP Tomorrow



MF Schemes
aimed at Children



Debt Funds
vs Bank FDs



MSO Model
Portfolio



MSO Readymade Proposal
- Vacation Planning



Term
Insurance



Health
Insurance



Top Up Health
Insurance



International
Health Cover



NPS -
Individual



NPS -
Corporate



Sukanya
Samridhi Yojana



Sovereign Gold
Bond (SGB)

Reference Sheet to initiate discussion with client

(For Private Circulation Only)



Investor's Age Bracket
40-50 Years



Normal SIP/
Step Up SIP



Limited Period
SIP



Lumpsum Investments
in Mutual Funds



Systematic
Transfer Plan (STP)



SIP Today
SWP Tomorrow



MF Schemes
aimed at Children



Debt Funds
vs Bank FDs



MSO Model
Portfolio



MSO Readymade Proposal
- Vacation Planning



Term
Insurance



Health
Insurance



Top Up Health
Insurance



International
Health Cover



NPS -
Individual



NPS -
Corporate



Sukanya
Samridhi Yojana



Sovereign Gold
Bond (SGB)

Reference Sheet to initiate discussion with client (For Private Circulation Only)



Investor's Age Bracket
50-60 Years



Normal SIP/
Step Up SIP



Lumpsum Investments
in Mutual Funds



Systematic
Transfer Plan (STP)



SIP Today
SWP Tomorrow



MF Schemes
aimed at Children



Debt Funds
vs Bank FDs



MSO Model
Portfolio



MSO Readymade Proposal
- Vacation Planning



Term
Insurance



Health
Insurance



Top Up Health
Insurance



NPS -
Individual



Sukanya
Samridhi Yojana



Sovereign Gold
Bond (SGB)

Reference Sheet to initiate discussion with client (For Private Circulation Only)



Investor's Age Bracket
60+ Years



Lumpsum Investments
in Mutual Funds



Systematic
Transfer Plan (STP)



Debt Funds
vs Bank FDs



Health
Insurance



Top Up Health
Insurance



International
Health Cover



NPS -
Individual



Sovereign Gold
Bond (SGB)



Senior Citizen
Savings Scheme

Reference Sheet to initiate discussion with client (For Private Circulation Only)

Product Name	20-30 Years	30-40 Years	40-50 Years	50-60 Years	60 Years +
Normal SIP / Step up SIP	✓	✓	✓	✓	
Limited Period SIP	✓	✓	✓		
Lumpsum Investments in Mutual Funds	✓	✓	✓	✓	✓
Systematic Transfer Plan (STP)	✓	✓	✓	✓	✓
SIP Today SWP Tomorrow	✓	✓	✓	✓	
MF Schemes aimed at Children	✓	✓	✓	✓	
Debt Funds vs Bank FDs		✓	✓	✓	✓
MSO Model Portfolio		✓	✓	✓	
MSO Readymade Proposal - Vacation Planning		✓	✓	✓	
Term Insurance	✓	✓	✓	✓	
Health Insurance	✓	✓	✓	✓	✓
Top Up Health Insurance		✓	✓	✓	✓
International Health Cover		✓	✓		✓
NPS - Individual	✓	✓	✓	✓	✓
NPS - Corporate		✓	✓		
Sukanya Samriddhi Scheme	✓	✓	✓	✓	
Sovereign Gold Bond (SGB)	✓	✓	✓	✓	✓
Senior Citizen Savings Scheme					✓

**MASTERSTROKE OFFERS A WIDE RANGE OF
 REPORTS, PROPOSALS, AND PRESENTATIONS WITH RESPECT TO THE
 ABOVE IDEAS.**

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Each client is different. Their risk profile is different. Their time horizon is different. The above chart is just for illustration. This is not an exhaustive list and MFDs should decide which product to offer to clients depending on their specific situation. Mutual Funds are subject to market risks. Please read the offer document before investing.