



**Making your journey great**

**Less taxing!**

**Tax benefit u/s 80c\***

**Invest in**

# LIC MF TAX PLAN

**An open-ended equity linked saving scheme with a statutory lock in of 3 years and tax benefit**



**Investment Objective**

To provide capital growth along with tax rebate and tax relief to our investors through prudent investments in the stock markets. An open ended equity linked tax saving Scheme which offers investors the opportunity to seek Tax rebate u/s 80C of the Income Tax Act 1961. However, there is no assurance that the investment objective of the Schemes will be realized.



**Minimum Application Amount**

₹ 500 and in multiples of ₹ 500 thereafter. For Systematic Investment Plan (SIP), the minimum amount is ₹ 500 (Daily), ₹ 500 (Monthly) & ₹ 1,500 (Quarterly) and in multiples of ₹ 500 thereafter.



**Load Structure**

Entry Load – Nil  
Exit Load – Nil  
(Subject to Lock-In Period of 3 years)



**Minimum Additional Amount**  
(For subsequent investments under an existing folio)

₹ 500 and in multiples of ₹ 500 thereafter.



**First Tier Benchmark Index**

Nifty 500 TRI



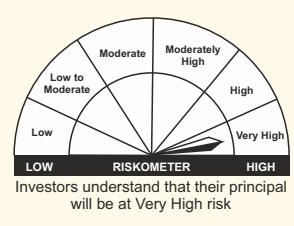
**Minimum Redemption Amount**

₹ 500 and in multiples of ₹ 500 thereafter.

To know more, please consult your **Financial Advisor**

OR

**Call Toll Free**  
**1800-258-5678**



**This product is suitable for investors who are seeking\*:**

- Long-term capital growth.
- Investment in equity and equity-related securities.
- **Risk - Very High**

\* Subject to ₹ 1.5 lakh under Section 80C of the Income Tax Act, 1961(As per prevailing tax laws in India).

\*Investors should consult their financial advisors if in doubt about whether the product is suitable for them. The change in Risk-o-meter will be evaluated on a monthly basis. For Scheme related details, including updation in Riskometer (if any) may please be referred on our website: [www.licmf.com](http://www.licmf.com)

## Investment Strategy

- Investing in wide universe of stocks across market caps which are in line with our investment framework and also meeting the criteria of long-term savings return for investors.
- Identify companies from the universe with strong competitive position in a good business and having quality management.
- Focus on fundamental driven investment.
- Following bottom up approach to stock selection and looking at intrinsic value.

## Who Should Invest?

- Investors who would like to participate in equity market and also want to avail tax exemption u/s 80C.
- Investors looking for capital appreciation with long-term investment horizon.
- Investors who have an investment horizon of more than 3 years.

## Asset Allocation

Instruments	Indicative allocations (% of total assets)		Risk Profile
	Minimum	Maximum	High / Medium / Low
Equity and equity related instruments	80	100	Medium to High
Debt and debt related instruments, G-Secs, Money market instruments and cash	0	20	Low to Medium

## Fund Manager

Mr. Yogesh Patil - managing since 18<sup>th</sup> September, 2020

## Plans Available

Regular Plan and Direct Plan.  
(The Regular and Direct plans will have a common portfolio)

## Risk Factors

For detailed scheme/securities related risk factors, please refer to the Scheme Information Document

## Options Available

1. Growth Option and 2. IDCW Option

The IDCW option has the following facility:

Pay-out of IDCW

Default Investment option is Growth Option.

\*IDCW: Income Distribution cum Capital Withdrawal

Regular Exercising is  
a Good Habit.



Cultivate another.  
Invest through

**DAILY SIP**

(Systematic Investment Plan)

Statutory Details Sponsor: Life Insurance Corporation of India.

Investment manager: LIC Mutual Fund Asset Management Ltd. CIN: U67190MH1994PLC077858

For further details, please refer to the Scheme Information Document, Statement of Additional Information & Key Information Memorandum cum Application forms, available on our website [www.licmf.com](http://www.licmf.com) and at the official points of acceptance of LIC Mutual Fund Asset Management Ltd.

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## LIC Mutual Fund Asset Management Ltd.

Investment Managers to LIC Mutual Fund  
Industrial Assurance Building, 4<sup>th</sup> Floor,  
Opp. Churchgate Station, Mumbai - 400020

For more details, contact:



Connect with us:



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1800-258-5678



[www.licmf.com](http://www.licmf.com)

MUTUAL FUND INVESTMENTS ARE SUBJECT TO MARKET RISKS, READ ALL SCHEME RELATED DOCUMENTS CAREFULLY.