

Retirement & Investment Goal Tracker

Year-by-year cash flow tracker across all your financial goals

Source: SEBI Investor Education Calculator. Values shown are frozen as of the last saved version of this worksheet and will not recalculate — for a live version, use the interactive calculator on our Tools & Calculators page or enter your own figures below.

Cash Flow												
In this sheet, you can study the growth in income and the amount you need to invest. Results in this sheet are valid only if entries in grey cells are ALL current. Refer to text for more details												

Note: Press calculate after completing asset allocation exercise for all goals												
Financial Goals		Retirement		Goal 2	Goal 3	Goal 4	Goal 5	Total Investment Amount Required	Monthly Salary take home (remove tax and total EPF/NPS contribution)	Home loan EMI	Average (annual/12) monthly expenses incl recurring expenses	Total investment possible = investible surplus
Annual increase in total monthly investment (%)		0	0	0	0	0	0		Rate at which salary is expected to increase (%)	Year Loan ends	Rate of inflation (%)	
Year	Life Events	Investment	Investment	Investment	Investment	Investment	Investment					
2,026		0	0	0	0	0	0	0				0
Results that can be seen only at the site												