

Shepherds ISA

Example ISA returns

Lump sum investments

Assuming 5% p.a. Growth

Initial Amount	Year		
	5	10	15
£500	£570	£680	£810
£1,000	£1,150	£1,360	£1,620
£2,000	£2,300	£2,730	£3,250
£3,000	£3,450	£4,100	£4,870
£4,000	£4,600	£5,470	£6,500
£5,000	£5,760	£6,840	£8,120
£7,200	£8,290	£9,850	£11,700
£10,000	£11,520	£13,680	£16,250

Assuming 7% p.a. Growth

Initial Amount	Year		
	5	10	15
£500	£630	£820	£1,080
£1,000	£1,260	£1,650	£2,160
£2,000	£2,530	£3,310	£4,330
£3,000	£3,800	£4,970	£6,490
£4,000	£5,070	£6,620	£8,660
£5,000	£6,330	£8,280	£10,820
£7,200	£9,120	£11,920	£15,590
£10,000	£12,670	£16,560	£21,650

Assuming 9% p.a. Growth

Initial Amount	Year		
	5	10	15
£500	£690	£990	£1,430
£1,000	£1,390	£1,990	£2,870
£2,000	£2,780	£3,990	£5,740
£3,000	£4,170	£5,990	£8,610
£4,000	£5,570	£7,990	£11,480
£5,000	£6,960	£9,990	£14,350
£7,200	£10,020	£14,390	£20,660
£10,000	£13,920	£19,990	£28,700

- Please note these figures are examples and are not guaranteed - they are not minimum or maximum amounts.
- What you get back depends on how your investment grows.
- You could get back more or less than the figures shown in the examples.

Example ISA returns

Regular monthly payments

Assuming 5% p.a. Growth

Monthly Premium	Year 5	Year 10
£50	£3,270	£7,160
£100	£6,550	£14,300
£150	£9,820	£21,500
£200	£13,100	£28,600

Assuming 7% p.a. Growth

Monthly Premium	Year 5	Year 10
£50	£3,440	£7,950
£100	£6,890	£15,900
£150	£10,300	£23,800
£200	£13,700	£31,800

Assuming 9% p.a. Growth

Monthly Premium	Year 5	Year 10
£50	£3,620	£8,820
£100	£7,240	£17,600
£150	£10,800	£26,400
£200	£14,400	£35,300

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- You could get back more or less than the figures shown in the examples.



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