



PORTFOLIO ENTERPRISES
(Committed Financial Services)

Distribution Partner



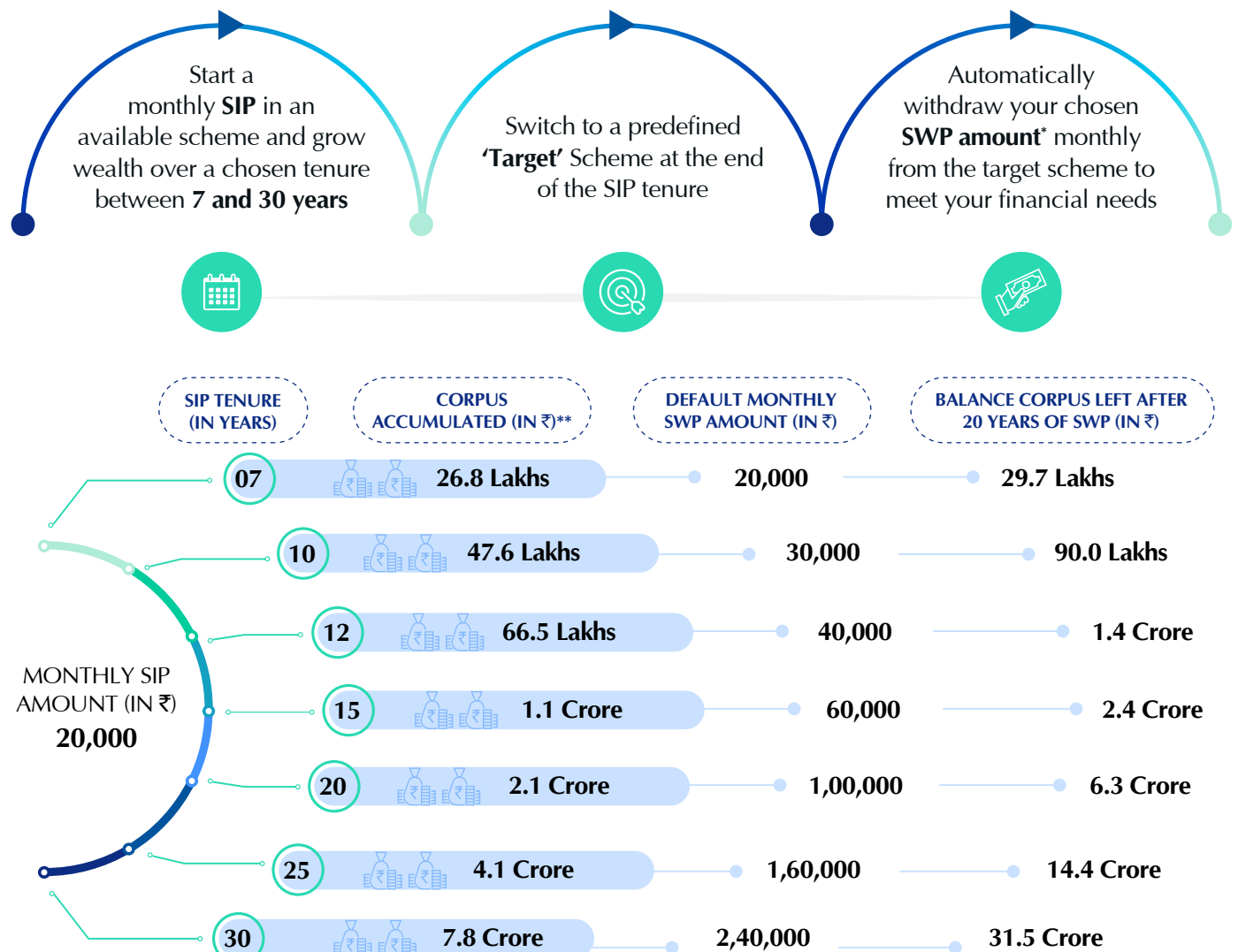
SUNDARAM MUTUAL
— Sundaram Finance Group —

Sundaram Prosperity SIP

Unlock Your Dreams



How does Sundaram Prosperity SIP work?



**Assumed SIP investment will grow at 12.42% based on the mean of 10-years rolling return of Nifty 50 Index between 30th June 2014 to 31st May 2024. Investment in the Target Scheme is assumed to grow at 9.52% based on the mean of 10-years rolling return of Nifty 50 (50%) + CRISIL 10-year Gilt Index (50%) between 30th June 2014 to 31st May 2024. Illustration returns have been calculated as per AMFI Guidelines. The SIP numbers are shown in one decimal place. The SWP calculations are done on actual SIP numbers. Sundaram Prosperity SIP does not in any way give assurance of the performance of any of the Schemes of Sundaram Mutual or provide any guarantee of withdrawals through SWPs. *Capped at default SWP amount.

Source: <https://www.sundarammutual.com/Prosperity-SIP-Calculator>



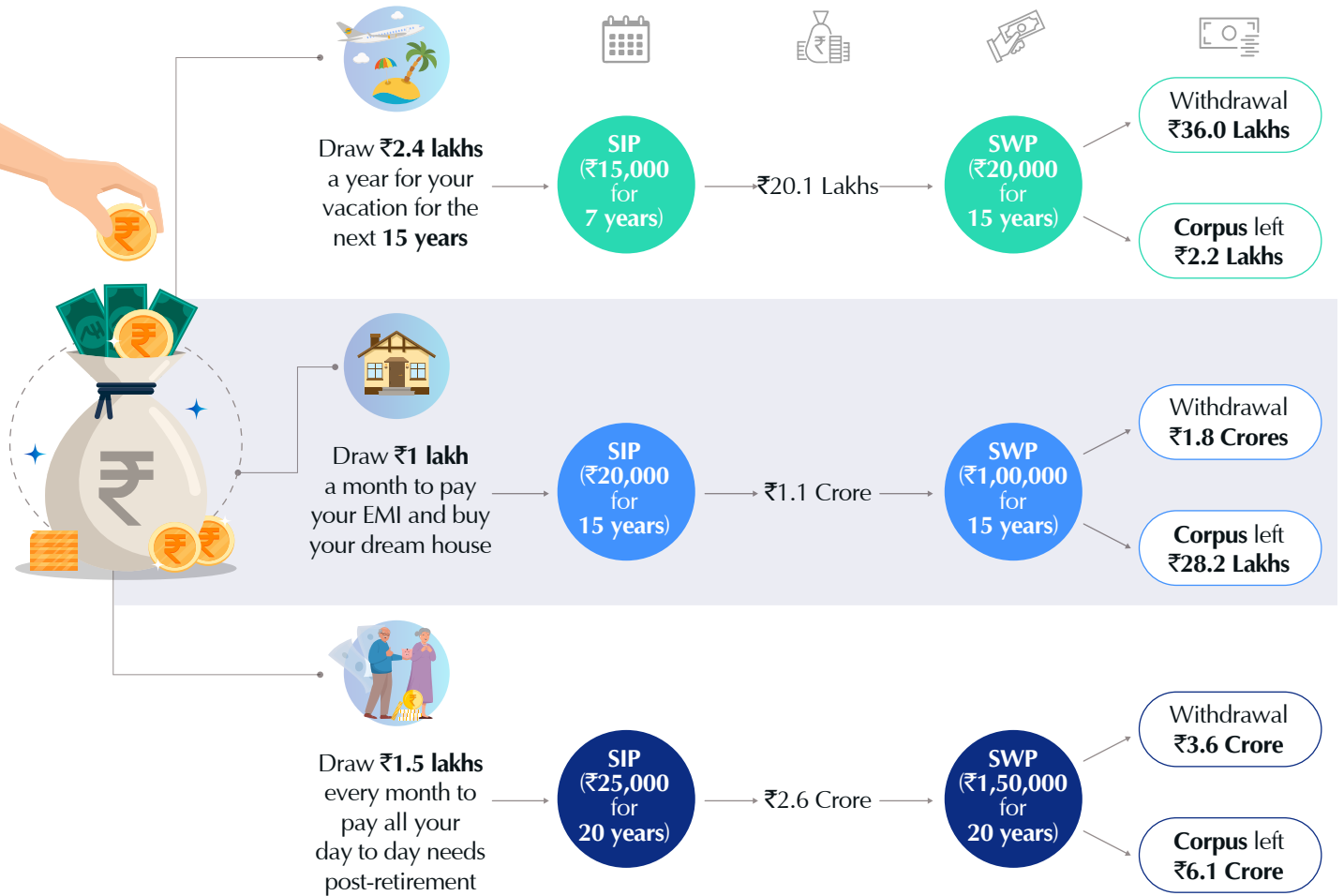
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Accomplishing Individual Dreams through Goal Planning



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Illustration

From Dream to Destination – A SIP tale of ₹10,000/month in **Sundaram Mid Cap Fund** from inception in 2002 leading to a steady monthly income of ₹30,000/month for 7 years. **Your financial future awaits!**

SIP		SWP	
Start Date	01-Aug-02	Start Date	01-Aug-17
End Date	01-Jul-17	End Date	02-Dec-24
Tenure of Investment	15 years	Withdrawal Tenure	89 months
Monthly SIP Amount	₹10,000	Investment Amount	₹ 1.5 Crore
Total Amount Invested	₹ 18.0 Lakhs	Monthly SWP Amount	₹ 30,000
Investment Value	₹ 1.5 Crore	Amount Withdrawn	₹ 26.7 Lakhs
XIRR (%)	25.4	Remaining Investment Value	₹ 4.0 Crore
		XIRR (%)	15.1

Past performance may or may not be sustained in future. This feature does not in any way give assurance of the performance of any of the Schemes of Sundaram Mutual or provide any guarantee of withdrawals through SWP mode. SWP withdrawals up to the year 2099 or until the corpus is exhausted, whichever is earlier.



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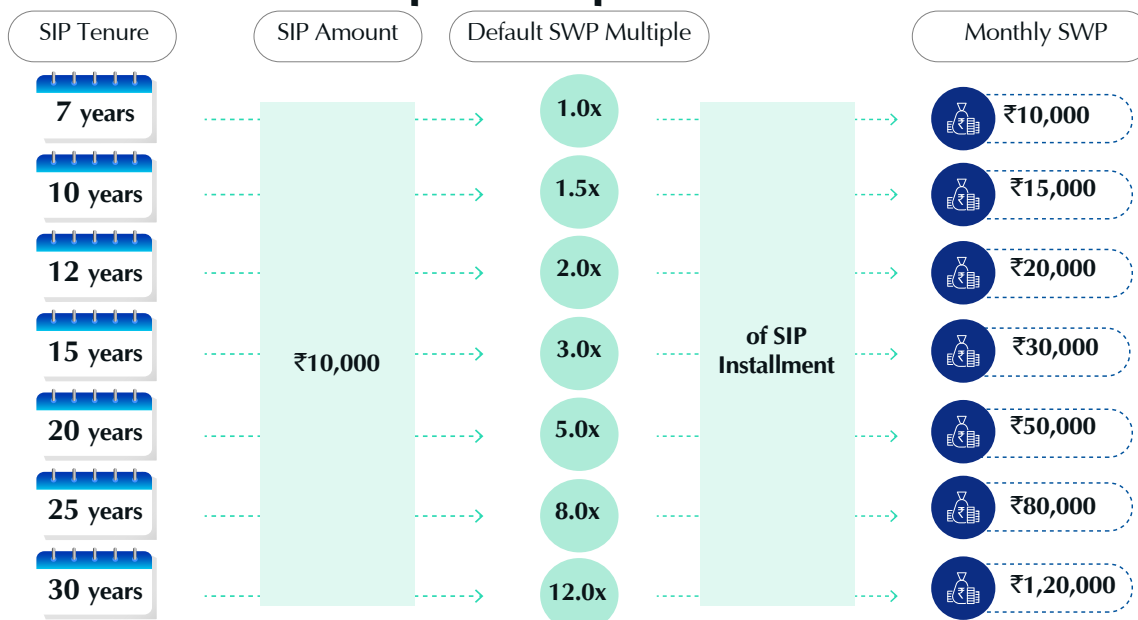
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Schemes available under Prosperity SIP

Scheme	SIP	SWP	Scheme	SIP	SWP	Scheme	SIP	SWP
Sundaram Mid Cap Fund	✓	✓	Sundaram Small Cap Fund	✓	✓	Sundaram Infrastructure Advantage Fund	✓	✓
Sundaram Large Cap Fund	✓	✓	Sundaram Equity Savings Fund	✓	✓	Sundaram Consumption Fund	✓	✓
Sundaram Flexi Cap Fund	✓	✓	Sundaram Dividend Yield Fund	✓	✓	Sundaram Balanced Advantage Fund	✓	✓
Sundaram Large and Mid Cap Fund	✓	✓	Sundaram Business Cycle Fund	✓	✓	Sundaram Multi Asset Allocation Fund	✓	✓
Sundaram Focused Fund	✓	✓	Sundaram Services Fund	✓	✓	Sundaram Aggressive Hybrid Fund	✓	✓
Sundaram Multi Cap Fund	✓	✓	Sundaram Financial Services Opportunities	✓	✓			

Frequency: Monthly for both SIP and SWP. Option: Growth. The source and target scheme may be the same. The AMC reserves the right to make changes in the list of eligible schemes from time to time. The Target Scheme is the Lumpsum switch and Monthly SWP Scheme. All upcoming Equity NFOs will be included in the Sundaram Prosperity SIP schemes.

Illustration: SWP income post completion of SIP



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Benefits of Prosperity SIP



Disciplined investing for the long-term



Freedom to choose desired tenure



Automated withdrawals to fund your lifestyle



Goal-based approach to investments



Freedom to choose the source and target scheme from our wide range of scheme offerings



Create Passive Income which can meet various financial needs



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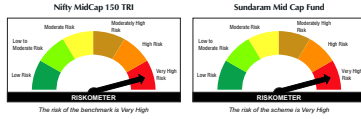
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Disclosures

Sundaram Mid Cap Fund

This product is suitable for investors who are seeking*

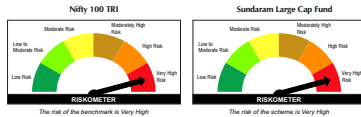
- Long term capital growth.
- Investment predominantly in diversified stocks that are generally termed as mid-caps.



Sundaram Large Cap Fund

This product is suitable for investors who are seeking*

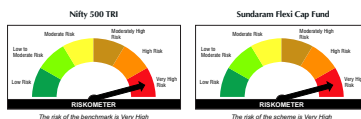
- Long term capital growth.
- Investment in equity and equity related securities of large cap companies.



Sundaram Flexi Cap Fund

This product is suitable for investors who are seeking*

- Capital appreciation over long term.
- Investments in a dynamic mix of equity and equity related instruments across large cap, mid cap and small cap stocks

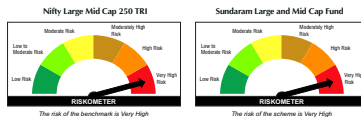


Investors understand that their principal will be at Very High Risk

Sundaram Large and Mid Cap Fund

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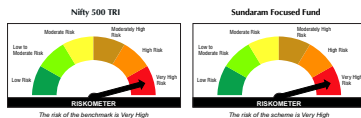
- Long term capital growth.
- Investment in equity & equity related securities in large and mid cap companies



Sundaram Focused Fund

This product is suitable for investors who are seeking*

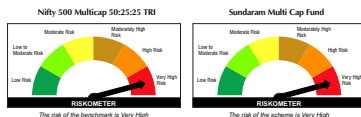
- Capital appreciation over long term.
- Investment in equities across market capitalization



Sundaram Multi Cap Fund

This product is suitable for investors who are seeking*

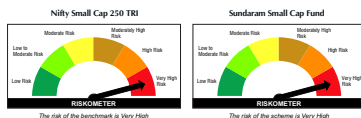
- Capital appreciation over medium to long term
- Investment in equity & equity related securities of companies across various market capitalization.



Sundaram Small Cap Fund

This product is suitable for investors who are seeking*

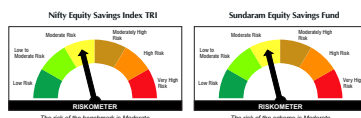
- Long term capital growth
- Investment in diversified stocks that are generally termed as small caps



Sundaram Equity Savings Fund

This product is suitable for investors who are seeking*

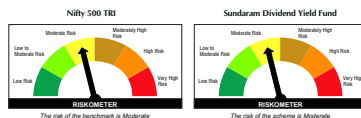
- Long term capital appreciation and income
- Investment in equity & equity related instruments, arbitrage opportunities, and investments in debt and money market opportunities



Sundaram Dividend Yield Fund

This product is suitable for investors who are seeking*

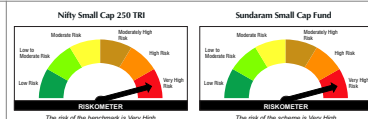
- Long term capital growth
- Investment in equity & equity related securities including equity derivatives of high dividend yield companies



Sundaram Business Cycle Fund

This product is suitable for investors who are seeking*

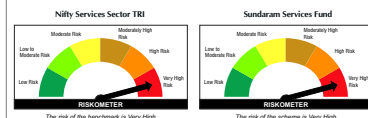
- Capital appreciation over long term
- An equity scheme investing in equity & equity related securities with focus on riding business cycle through dynamic allocation between various sectors and stocks at different stages of business cycle in the economy.



Sundaram Services Fund

This product is suitable for investors who are seeking*

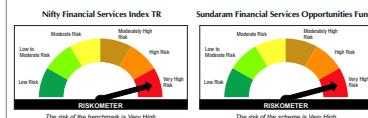
- Long term capital growth.
- Investing in equity/related instruments of companies who have business predominantly in the Services Sector of the economy.



Sundaram Financial Services Opportunities Fund

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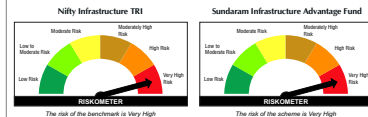
- Long term capital growth.
- Investment in equity and equity related instruments of companies engaged in Banking & Financial Services



Sundaram Infrastructure Advantage Fund

This product is suitable for investors who are seeking*

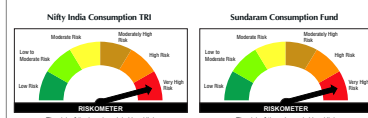
- Long term capital growth
- Investment in equity and equity related instruments of companies engaged either directly or indirectly in infrastructure- and infrastructure related activities or expected to benefit from the growth and development of infrastructure



Sundaram Consumption Fund

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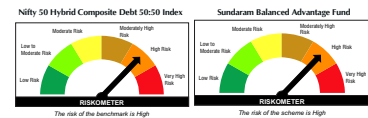
- Long term capital growth.
- Investment predominantly in equity and equity related instruments of companies focussing on rural and/or consumption themes



Sundaram Balanced Advantage Fund

This product is suitable for investors who are seeking*

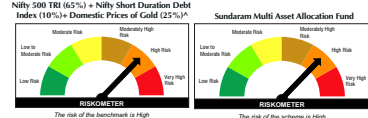
- Income generation and Long term capital appreciation
- Investment in a dynamically managed asset allocation fund, consisting of a portfolio of Equities, Debt, Derivatives and REITs/bdVts



Sundaram Multi Asset Allocation Fund

This product is suitable for investors who are seeking*

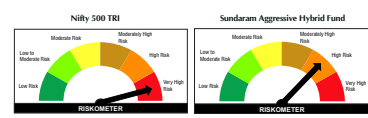
- Long term capital growth
- Investment in Equity and equity related securities, debt & money market instruments, gold ETFs



Sundaram Aggressive Hybrid Fund

This product is suitable for investors who are seeking*

- Long Term Capital Growth and Income
- A mix of investments predominantly in equity and equity related instruments and fixed income securities



*Investors should consult their financial advisers if in doubt about whether the product is suitable for them.

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