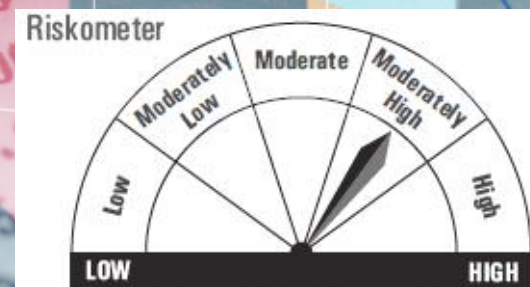




POWERING YOUR FINANCIAL GROWTH

SUNDARAM EMERGING SMALL CAP - SERIES VII

A close-ended Equity Scheme
Investing Predominantly in
Small Cap Stocks



Investors understand that their principal will be
at moderately high risk

NEW FUND OFFER OPENS ON	September 10, 2018
NEW FUND OFFER CLOSES ON	September 24, 2018
FUND CATEGORY	Small Cap
TYPE OF SCHEME	A close-ended equity scheme investing predominantly in small cap stocks
FUND TENURE	5 Years
PLAN OPTIONS	Growth, Dividend Payout & Dividend Sweep
BENCHMARK	S&P BSE 250 Small Cap Index
FUND MANAGERS	Mr. S Krishnakumar
MIN. INVESTMENT AMOUNT	Rs 5,000 and in multiple of Rs 1 thereafter
EXIT LOAD	Not Applicable

INVESTMENT OBJECTIVE OF THE SCHEME

Sundaram Emerging Small Cap Fund has an investment objective to seek capital appreciation by investing predominantly in equity/equity-related instruments of companies that can be termed as Small Caps.

Small Cap Stocks are defined as 251st company onwards in terms of full market capitalisation

INVESTMENT ALLOCATION & STRATEGY

Under normal market circumstances, the fund will follow the below asset allocation pattern:

ASSET CLASS	MINIMUM	MAXIMUM
Total Equity & Equity Related Securities of Small Cap Stocks	65%	100%
Other Equity	0%	35%
Fixed Income & Money Market Securities	0%	35%

*“Other Equity” refers to Large-cap & Mid Cap stocks Large cap stocks are defined as 1st to 100th company in terms of full market capitalization & Mid Cap stocks are defined as 101st to 250th company in terms of full market capitalization

INVESTMENT STRATEGY

- Sundaram Emerging Small Cap Fund will focus on Small cap stocks, which are defined as 251st company onwards in terms of market capitalization. The Investment Manager shall pursue a strategy where it tries to capture small cap stocks through its study of industry and management
- The Fund will focus on maintaining a diversified portfolio of around 50 growth oriented reasonably valued small cap stocks. Emphasis will be on investing in companies with quality management, unique business strengths, sustainable long-term growth prospects and reasonable valuations.
- The fund would follow a bottom up approach in stock selection based on in- house research
- The Investment Manager shall pursue a strategy where it tries to capture small cap stocks through its study of industry and management. Emphasis will be laid on the growth potential for the company as well as the sector to which the company belongs.
- The fund manager will focus on themes such as Consumer Discretionary, Financial Services, Industrial, Engineering and Emerging Businesses such as Transportation, Logistics, Healthcare, Education, etc.

ABOUT THE FUND MANAGER

Mr. S Krishnakumar will be the fund manager of the scheme.

Mr. S Krishnakumar comes comes with over 15 years of experience in equity markets. He joined the fund house in December 2003 as a Senior Research Analyst. Previously, Mr. Krishnakumar served as a Vice President at Anush Shares and Securities Pvt. Ltd. He spent seven years at the firm. Prior to that, Mr. Krishnakumar was a Senior Engineer at Lucas TVS. He is a BE (Hons) and a PGDBA. He solely manages 10 other schemes of the fund house and co manages five schemes.

FUND MANAGER PERFORMANCE

Performance of open-ended schemes managed by **Mr S. Krishnakumar**

Sundaram Small Cap Fund and Sundaram Mid Cap Fund, managed by him, have delivered a compounded return of nearly 30% each in the 5-year period (as on August 27, 2018), beating the benchmark by a decent margin.

Scheme Name	Managing Since	AUM (Cr.)					Return	Benchmark
		Latest	6 Months	1 Year	3 Years	5 Years		
Sundaram Infra Advantage Fund(G)	Apr-2013	673.12	-8.63	3.73	10.03	22.86		S&P BSE 100 - TRI
Sundaram Large and Mid Cap Fund(G)	Jan-2012	407.22	10.69	22.30	17.30	24.42		NIFTY 200 - TRI
Sundaram Rural and Consumption Fund(G)	Jan-2016	2,649.66	4.15	8.47	19.77	25.90		NIFTY 500 - TRI
Sundaram Small Cap Fund(G)	Oct-2006	1,192.25	-13.97	-4.11	9.57	29.48		S&P BSE Small-Cap - TRI
Sundaram Mid Cap Fund(G)	Nov-2012	6,137.74	-2.02	6.62	13.76	29.24		S&P BSE Mid-Cap - TRI
Sundaram Diversified Equity(D)	Mar-2015	2,750.35	3.02	9.39	13.87	21.46		S&P BSE 200 - TRI
Sundaram Fin Serv Opp Fund(G)	Dec-2017	155.15	5.78	8.14	14.76	23.80		Nifty Financial Services - TRI
Benchmark								
S&P BSE 100 - TRI			10.93	18.75	15.53	19.47		
NIFTY 200 - TRI			9.73	18.36	15.68	20.47		
NIFTY 500 - TRI			7.98	17.13	15.78	21.03		
S&P BSE Small-Cap - TRI			-5.69	9.31	16.55	27.91		
S&P BSE Mid-Cap - TRI			1.41	10.70	17.25	27.48		
S&P BSE 200 - TRI			10.05	18.59	15.85	20.63		
Nifty Financial Services - TRI			11.78	17.70	19.71	26.60		
Total AUM		13,965.49						

* Data as on August 27, 2018. Source: ACE MF, PL Mutual Fund Desk

FUND SUITABILITY

- Sundaram Emerging Small Cap Fund is suitable for high risk profile investors who are seeking the opportunity to benefit from the growth potential of small cap stocks
- Given the close-ended structure, the fund is better placed to pick stocks with a long term outlook
- The fund will be managed by a proven fund manager proven fund manager with a long and successful track record
- New companies and new sectors most likely will start their life-cycle as small caps. An early investment in them offers the opportunity for long-term wealth creation as they transition from small to mid and eventually to large cap companies
- The small cap space is an underinvested and underresearched segment offering potential for significant returns. The recent price correction has made valuations more reasonable and offers an opportune entry point. The Buy-and-Hold approach to enable alpha generation during periods of strong economic expansion.

***To invest in this fund, kindly get in touch with**

Deepak Chellani (Product Head) **022-6632 2285** | Mail us at WMS@plindia.com

DISCLAIMER

(Mutual Funds are subject to market risks, please read all scheme related documents carefully).

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