SUNDARAM MUTUAL UMRN For office use only		D	Date DDMMYYYY
NACH/OTM Registration Sponsor Bank Code	CITI000PIGW	Create	
Utility Code C1TI0000200000037	I/We autho	rise SUNDAF	RAM MUTUAL FUND
②To debit Tick (✓) ☐ SB ☐ CA ☐ SB-NRE ☐ SB-NRO ☐ Others	Bank A/c No		3
With Bank Name of customers bank	IFSC	or MICF	3
			₹
DEBIT TYPE 🗵 Fixed Amount 🕜 Maximum Amount FREQUE	CY Monthly Quarterly		Hy As & when presented
① Reference 1 URN	Reference 2	Folio No	8
[®] Phone No	Email ID		(I)
 I agree for the debit of Mandate processing charges by the Bank whom I am author has been carefully read, understood and made by me/us. I am authorising the user en that I am authorised to cancel/amend this mandate by appropriately communicating to 	ng to debit my account as per latest Sch /corporate to debit my account, based cancellation/amendment request to th	nedule of charges of the Bank. I on the instructions as agreed a e user entity/corporate or the b	2. This is to confirm that the declaration and signed by me. 3. I have understood bank where I have authorized the debit.
(a) PERIOD From D D M M Y Y Y Y			
To PPMMYYYY Signature of the Primary Holder	Signature of the Joint Accou	nt Holder Signatur	re of the Joint Account Holder
or Until Cancelled 1 Name as in bank records	2 Name as in bank reco	rds 3 Na	ame as in bank records ®
	 		(First time investors should use this
SIP Registration / Renewa	form / Modification - NACH / Or	ne Time Mandate (OTM)	form along with the application form)
Please tick ☑ as applicable: ☐ NACH/OTM Form is attached and to be registered in the folio. SIP will start ☐ NACH/OTM Form is already registered in the folio. [No need to submit aga		y take 30 days.	SC's signature &
Distributor's ARN & Name Sub-broker's ARN Sub-broker Code (Employee Unique Idendification (Code)		Office use only	Time Stamping
ARN-64917 E434563			
☐ I/We confirm that the EUIN box is intentionally left blank by me/us as this is an "execution-only" transaction with		nnel concerned. Upfront	
commission shall be paid directly by the investor to the AMFI registered Distributors based on the investors' asse Name of First/Sole Applicant Gender* Male Female Others	nent of various factors including the service renderd	ad by the distributor. Sole	e/First Applicants's Signature Mandatory
Name of Second Applicant Gender* Male Female Others			PIN Code*
Name of Third Applicant Gender* ☐ Male ☐ Female ☐ Others			
			PIN Code*
Nanci	Now	Investor Application No.	
Existing Investor Folio No.	New	Central KYC Number	☐ CKYC Proof attached (Mandatory)
Permanent Account Number (PAN)* PEKRN		Central KTC Number	CRTC Proof attached (Mandatory)
First/Sole Applicant/Guardian			
Second Applicant			
Third Applicant			
Please tick ☑ ☐ SIP Registration ☐ SIP with Top-up Registration ☐ CKYC compliant ☐ Yes ☐ No (if no, please provide CKYC proof/add			ion relevant SIP details in the form and UTM mandate.)
1 Scheme Name F		·	ayout ☐ Re-Investment ☐ Sweep*)
*Dividend Sweep Target Scheme			
SIP Installment Amount (₹)	Frequency: \square We	eekly Monthly Quarterly	У
SIP Top Up amount (Optional): ₹	(in multiples of ₹ 500/-) Тор-и	p Frequency Half-yearly	y □ Yearly
Start Month/Year: Mark Mark Mark Month/Year (Default De	2099): [M M Y Y Y Y D Till	Further Notice	
SIP Date (Please mention the SIP date) (Monthly/Quarterly):	y Date 01 to 31; Weekly: Only on	Wednesday	
1 Dank Nama	Charrie	No	Datad
1 <u>-Bank Name</u>	<u>Cheque</u>	.INU	<u>Dated</u>

Following fields need to be filled mandatorily

- 1. Date: In format DD/MM/YYYY
- 3. Fill Bank Account Number
- 5. IFSC / MICR code: Fill respective code
- 7. Reference 1: Mention Folio Number
- 9. Telephone Number (Optional)
- 11. Period: Starting date of NACH registration (in format DD/MM/YYYY)
- 2. Bank A/c Type: Tick the relevant box
- 4. Fill name of Destination Bank
- 6. Mention Maximum Amount
- 8. Reference 2: Mention Application Number
- 10. Email ID
- 12. Signature as per bank account
- 13. Name: Mention Holder Name as Per Bank Record

Other Instructions

- NACH/OTM Bank Mandate can be used for both SIP and Lump Sum Purchase.
- Investors are allowed to perform Lump sum purchase and SIP on a same day provided the NACH/OTM bank account has the adequate funds to honor multiple debits
- NACH/OTM is applicable for both Individual and Non-Individual
- Registration of Multiple NACH/OTM forms is acceptable with different Bank and Accounts.
- Per transaction limit should be less than or equal to the amount as mentioned in NACH/OTM Form already registered or submitted, if not registered
- · Investor with registered SIP with OTM facility wishing to cancel the OTM are advised to

- apply for another registration. Post successful registration investor should write to AMC to continue SIP with fresh OTM and then apply for cancellation of existing (old) OTM.
- NACH/OTM request will be accepted only if the "Bank" mentioned in the request form is listed in the NACH banks list. Please contact offices of Sundaram Asset Management Company/ visit www.sundarammutual.com for updated list of banks eligible for NACH/OTM Facility.
- Submitting NACH/OTM form does not confirm your investments in SMF unless supported by SIP Investment Form or Common Transaction forms
- Sundaram Mutual will initiate debit instructions to the investor bank account only on receipt
 of valid investment instruction from the investor and upon confirmation of NACH registration
 with the designated bank.
- For other Terms and Conditions governing NACH/OTM payments please refer KIM or www.sundarammutual.com
- NACH/OTM is applicable only for investments via debit instructions
- By submitting the NACH/OTM the investor authorizes Sundaram Mutual to utilize the information provided herein for the purpose of his/her investments in Sundaram Mutual Fund, including creation of a folio
- Investors are deemed to have read and understood the requirements and contents of Statement of Additional Information (SAI), Scheme Information Document (SID) and all other scheme related documents

2	Scheme Name	Plan: \square Regular \square Direct; Option: \square Growth \square Dividend (\square	☐ Payout ☐ Re-Investment ☐ Sweep*)
	*Dividend Sweep Target Scheme		
	SIP Installment Amount (₹)	Frequency: ☐ Weekly ☐ Monthly ☐ Quar	rterly
	SIP Top Up amount (Optional): ₹	(in multiples of ₹ 500/-) <i>Top-up Frequency</i> ☐ Half-ye	early □ Yearly
	Start Month/Year: [M M Y Y Y Y Y End Month/Year (Default	Dec 2099): M M Y Y Y Y □ Till Further Notice	
	SIP Date (Please mention the SIP date) (Monthly/Quarterla	y): Any Date 01 to 31; Weekly: Only on Wednesday	
	2-Bank Name	Chegue No	Dated
3	Scheme Name		☐ Payout ☐ Re-Investment ☐ Sweep*)
	*Dividend Sweep Target Scheme		
	SIP Installment Amount (₹)	Frequency: ☐ Weekly ☐ Monthly ☐ Quar	rterly
	SIP Top Up amount (Optional): ₹	(in multiples of ₹ 500/-) Top-up Frequency ☐ Half-ye	early □ Yearly
	Start Month/Year: [M M Y Y Y Y] End Month/Year (Default	Dec 2099): MMMYYYYY □ Till Further Notice	
	SIP Date (Please mention the SIP date) (Monthly/Quarterla	y): Any Date 01 to 31; Weekly: Only on Wednesday	
	3-Bank Name	Cheque No	Dated
4	Scheme Name	Plan: Regular Direct; Option: Growth Dividend (☐ Payout ☐ Re-Investment ☐ Sweep*)
	*Dividend Sweep Target Scheme		
	SIP Installment Amount (₹)	Frequency: ☐ Weekly ☐ Monthly ☐ Quar	rterly
	SIP Top Up amount (Optional): ₹	(in multiples of ₹ 500/-) <i>Top-up Frequency</i> ☐ Half-ye	early □ Yearly
	Start Month/Year:	Dec 2099): MM M Y Y Y Y Y □ Till Further Notice	
	SIP Date (Please mention the SIP date) (Monthly/Quarterla	y): Any Date 01 to 31; Weekly: Only on Wednesday	
	4 Rank Nama	Chaqua Na	Datad

5	Scheme Name	Plan: ☐ Regular ☐ Direct; Option: ☐ Gro	owth ☐ Dividend (☐ Payout ☐ Re-Investment ☐ Sweep*)
	*Dividend Sweep Target Scheme		
	SIP Installment Amount (₹)	Frequency: Weekly	r ☐ Monthly ☐ Quarterly
	SIP Top Up amount (Optional): ₹	(in multiples of ₹ 500/-) <i>Top-up Fi</i>	requency ☐ Half-yearly ☐ Yearly
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	SIP Date (Please mention the SIP date) (M	onthly/Quarterly): Any Date 01 to 31; Weekly: Only on Wee	dnesday
	5-Bank Name	Chegue No	Dated
		in Demat option, may provide a copy of the DP Statement enabling	g us to match the Demat details as stated in the application form)
	National Securities Depository Ltd. Depository Pa		
	Central Depository Services (India) DP ID Number	e contents of the Statement of Additional Information/S	
reg in r ₹ 5 the	gulations of the scheme(s) • agree to the terms and making this investment • do not have any existing N 0,000 in a financial year or a rolling period of twe	r the scheme(s) as indicated in the application form of conditions for NACH/OTM of have not received nor beauticro SIPs/investments which together with the current applicable for PAN exempt category of in my other mode), payable to him for the different compe	en induced by any rebate or gifts, directly or indirectly pplication will result in the total investments exceeding vestors). The ARN holder has disclosed to me/us all
Su con inti all/ go an	ndaram Asset Management, its sponsor, their insequences/losses/costs/damages in case of any mating any changes to the above particulars. I/W any of the information provided by me/ us, include wernmental or statutory or judicial authorities/agenty.	ein are true, correct and complete to the best of my/our employees, authorised agents, service providers, y of the above particulars being false, incorrect or incide hereby authorise Sundaram Asset Management to ding all changes, updates to such information as ancies, the tax/revenue authorities and other investigation hereby agree to provide any additional information/doc	representatives of the distributors liable for any complete or in case of my/our not intimating/delay in disclose, share, remit in any form, mode or manner, d when provided by me/us, to any Indian or foreign agencies and SEBI registered intermediaries without
		Signatures [as per Mutual Fund Records / Application	1]
	First Unit Holder's / Guardian Signature	Second Unit Holder's Signature	Third Unit Holder's Signature

General Instructions

- This facility is offered to investors having Bank accounts in select banks (269) mentioned in our application form. The Banks in the list may be modified/updated/ changed/removed at any time in future entirely at the discretion of Sundaram Asset Management Ltd ("SAMC"), Sundaram Trustee Company Ltd. ("Trustee") or Sundaram Mutual Fund ("SMF") without assigning any reasons or prior notice. SIP instructions for investors in such Banks via NACH route will be discontinued.
- 2. The AMC/ Trustee/ SMF will not be liable for any transaction failures due to rejection by the investors bank/branch.
- The investor agrees to abide by the terms and conditions of NACH facility of NPCI.
- 4. Investor will not hold AMC / Trustee / SMF and its service providers responsible if the transaction is delayed or not effected by the Investor's Bank or if debited in advance or after the specific SIP date due to various reasons or for any bank charges debited by his banker in his account towards NACH Registration / Cancellation / Rejections.
- 5. The AMC/ Trustee/ SMF reserves the right to reverse allotments in case the NACH/OTM is rejected by the bank for any reason whatsoever.
- The AMC/ Trustee/ SMF shall not be responsible and liable for any damages/compensation for any loss, damage etc., incurred by the investor. The investor assumes the entire risk of using the facility of NACH/OTM and takes full responsibility for the same.
- 7. The AMC/Trustee reserves the right to discontinue or modify the SIP facility at any time in future on a prospective basis.
- 8. The AMC/ Trustee reserves the right to discontinue the SIP in case of Direct Debit through NACH routes are rejected by the investor bank for any reasons.
- For scheme related details, please refer to the Scheme Information Document (SID) / Key Information Memorandum (KIM) and the addendum issued from time to time.
- 10. The AMC/ Trustee reserves the right to reject any application without assigning any reason thereof.
- 11. SIP cancellation can be done separately by submitting the request at least 21 Business days in advance; however the associated NACH mandate can be retained for future investments.
- 12. For intimating the change in bank particulars, please use the NACH/OTM Form to modify transaction limit or add / remove banks from the NACH/OTM facility. Also fill-up all the relevant details as applicable. Requests for any changes / cancellation in the NACH Bank Mandate request should be submitted at least 30 Business days in advance.
- 13. In case of Micro SIPs, please refer to KIM under "your guide to fill the application form" for more details.

14. SIP Frequencies & Instalment amount

- Weekly (For Minimum amount of ₹ 1000, Minimum No. of installments is 5)
- Monthly (For Minimum amount of ₹ 100, minimum No. of installments is 20)

• Quarterly (For Minimum amount of ₹ 750, minimum No. of installments is 7)

15. Default options

SIP default date is 7th of every month, if no date is mentioned. For weekly frequency, SIP will be processed on Wednesday.

Default frequency: Monthly, if frequency is not mentioned

16. For SIP through NACH/OTM investors can choose any preferred date of the month as SIP debit date. In case the chosen date falls on a non-business day, the SIP will be processed on the immediate next business day.

In case chosen date is not available in a particular month, the SIP will be processed on the last business day of the month.

17. Investors are required to submit SIP request at least 30 days prior to the date of first instalment.

The following applications will be considered as 'Not In Good Order' (NIGO) and are liable to be rejected:

- If folio number mentioned in the Fresh / Additional Purchase, SIP NACH/OTM form, Switch, STP, SWP & NCT request does not match Folio Number mentioned in NACH/OTM registration mandate Form.
- If the folio number mentioned in the NACH/OTM mandate registration form does not match with our record, the NACH/OTM mandate will not be registered.
- If the SIP period mentioned in SIP via NACH/OTM form is beyond the NACH/OTM validity period or NACH/OTM validity period expired.
- 18. In case of minor application, AMC will register standing instructions till the date of minor attaining majority, though the instructions may be for a period beyond that date. Prior to minor attaining majority, AMC shall send advance notice to the registered correspondence address advising the guardian and the minor to submit an application form along with prescribed documents to change the status of the account to 'major'. The account shall be frozen for operation by the guardian on the day of minor attains the age of majority and no fresh transactions will be permitted till the documents for changing the status are received

19. Frequency for Top-up SIP

Top up applicable for Monthly & Quarterly frequencies only

i. For Monthly SIP

- a. Half yearly Top-up SIP under this option, the amount of investment through SIP installment shall be increased by the amount chosen /designated by investor post every 6th (sixth) SIP instalment
- b. Yearly Top-up SIP under this option, the amount of investment through SIP installment shall be increased by the amount chosen /designated by investor post every 12th (twelth) SIP instalment

ii. Quarterly SIP

a. Yearly Top-up SIP under this option, the amount of investment through SIP installment shall be increased by the amount chosen /designated by investor post every 4th (fourth) SIP instalment. In case the investor who has registered under Quarterly SIP opts for Half yearly Top-up SIP the same shall be registered and processed as Yearly Top-up SIP.

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Following fields need to be filled mandatorily

- 1. Date: In format DD/MM/YYYY
- 3. Fill Bank Account Number
- 5. IFSC / MICR code: Fill respective code
- 7. Reference 1: Mention Folio Number
- 9. Telephone Number (Optional)
- Period: Starting date of NACH registration (in format DD/MM/YYYY)
- 2. Bank A/c Type: Tick the relevant box
- 4. Fill name of Destination Bank
- 6. Mention Maximum Amount
- 8. Reference 2: Mention Application Number
- 10. Email ID
- 12. Signature as per bank account
- 13. Name: Mention Holder Name as Per Bank Record

Other Instructions

- NACH/OTM Bank Mandate can be used for both SIP and Lump Sum Purchase.
- Investors are allowed to perform Lump sum purchase and SIP on a same day provided the NACH/OTM bank account has the adequate funds to honor multiple debits
- NACH/OTM is applicable for both Individual and Non-Individual
- Registration of Multiple NACH/OTM forms is acceptable with different Bank and Accounts.
- Per transaction limit should be less than or equal to the amount as mentioned in NACH/OTM Form already registered or submitted, if not registered

- Investors are required to submit "NACH/OTM" registration first and only after successful registration an existing "NACH" associated with a SIP can be cancelled.
- NACH/OTM request will be accepted only if the "Bank" mentioned in the request form is listed
 in the NACH banks list. Please contact offices of Sundaram Asset Management Company/ visit
 www.sundarammutual.com for updated list of banks eligible for NACH/OTM Facility.
- Submitting NACH/OTM form does not confirm your investments in SMF unless supported by SIP Investment Form or Common Transaction forms
- Sundaram Mutual will initiate debit instructions to the investor bank account only on receipt of valid investment instruction from the investor.
- For other Terms and Conditions governing NACH/OTM payments please refer KIM or www.sundarammutual.com
- NACH/OTM is applicable only for investments via debit instructions
- By submitting the NACH/OTM the investor authorizes Sundaram Mutual to utilize the information provided herein for the purpose of his/her investments in Sundaram Mutual Fund, including creation of a folio
- Investors are deemed to have read and understood the requirements and contents of Statement
 of Additional Information (SAI), Scheme Information Document (SID) and all other scheme
 related documents

General Instructions

- 1. This facility is offered to investors having Bank accounts in select banks (269) mentioned in our application form. The Banks in the list may be modified/updated/changed/removed at any time in future entirely at the discretion of Sundaram Asset Management Ltd ("SAMC"), Sundaram Trustee Company Ltd. ("Trustee") or Sundaram Mutual Fund ("SMF") without assigning any reasons or prior notice. SIP instructions for investors in such Banks via NACH route will be discontinued.
- 2. The AMC/ Trustee/ SMF will not be liable for any transaction failures due to rejection by the investors bank/branch.
- SIP through NACH/OTM Facility is available on all dates of the month. In case these
 days are non-business days for the scheme, then SIP will be processed on the next
 business day.
- 4. The investor agrees to abide by the terms and conditions of NACH facility of NPCI.
- Investor will not hold AMC / Trustee / SMF and its service providers responsible if
 the transaction is delayed or not effected by the Investor's Bank or if debited in
 advance or after the specific SIP date due to various reasons or for any bank
 charges debited by his banker in his account towards NACH Registration /
 Cancellation / Rejections.
- The AMC/ Trustee/ SMF reserves the right to reverse allotments in case the NACH/OTM is rejected by the bank for any reason whatsoever.
- The AMC/ Trustee/ SMF shall not be responsible and liable for any damages/compensation for any loss, damage etc., incurred by the investor. The investor assumes the entire risk of using the facility of NACH/OTM and takes full responsibility for the same.
- 8. The AMC/Trustee reserves the right to discontinue or modify the SIP facility at any time in future on a prospective basis.
- The AMC/ Trustee reserves the right to discontinue the SIP in case of Direct Debit through NACH routes are rejected by the investor bank for any reasons.
- For scheme related details, please refer to the Scheme Information Document (SID)
 / Key Information Memorandum (KIM) and the addendum issued from time to time.
- The AMC/ Trustee reserves the right to reject any application without assigning any reason thereof.
- SIP cancellation can be done separately by submitting the request at least 21 Business days in advance; however the associated NACH mandate can be retained for future investments.
- 13. For intimating the change in bank particulars, please use the NACH/OTM Form to modify transaction limit or add / remove banks from the NACH/OTM facility. Also fill-up all the relevant details as applicable. Requests for any changes / cancellation in the NACH Bank Mandate request should be submitted at least 30 Business days in advance.
- 14. Where a onetime mandate is already registered in a folio for a bank account, the Unit Holder(s) will have to fill only the SIP Registration Form and there is no need of a separate cheque to be given along with the SIP Registration Form.
- In case of Micro SIPs, please refer to KIM under "your guide to fill the application form" for more details.

16. SIP Frequency

For Fixed Income

- Weekly every Wednesday (For Minimum amount of ₹ 1000, Minimum No. of installments is 5)
- Monthly (For Minimum amount of ₹ 250, minimum No. of installments is 20)
- Quarterly (For Minimum amount of ₹ 750, minimum No. of installments is 7)

For Equity

- Weekly every Wednesday (For Minimum amount of ₹ 1000, Minimum No. of installments is 6)
- Monthly (For Minimum amount of ₹ 100, minimum No. of installments is 6)
- Quarterly (For Minimum amount of ₹ 750, minimum No. of installments is 6)
- 17. SIP default date is 7th of every month, if no date is mentioned
- 8. Any Day SIP: Investors can choose any preferred date of the month as SIP debit

- date. In case the chosen date falls on a non-business day, the SIP will be processed on the immediate next business day. In case chosen date is not available in a particular month, the SIP will be processed on the last business day of the month.
- Investors are required to submit SIP request at least 30 days prior to the date of first instalment.

The following applications will be considered as 'Not In Good Order' (NIGO) and are liable to be rejected:

- If folio number mentioned in the Fresh / Additional Purchase, SIP NACH/OTM form, Switch, STP, SWP & NCT request does not match Folio Number mentioned in NACH/OTM registration mandate Form.
- If the folio number mentioned in the NACH/OTM mandate registration form does not match with our record, the NACH/OTM mandate will not be registered.
- If the SIP period mentioned in SIP via NACH/OTM form is beyond the NACH/OTM validity period or NACH/OTM validity period expired.
- In case of minor application, AMC will register standing instructions till the date of minor attaining majority, though the instructions may be for a period beyond that date. Prior to minor attaining majority, AMC shall send advance notice to the registered correspondence address advising the guardian and the minor to submit an application form along with prescribed documents to change the status of the account to 'major'. The account shall be frozen for operation by the guardian on the day of minor attains the age of majority and no fresh transactions will be permitted till the documents for changing the status are received

21. Frequency for Top-up SIP

- i. Investors subscribing for this facility are required to submit the request at least $25\ \mathrm{days}$ prior to the SIP top up date
- ii. SIP Top-Up facility can be availed at half yearly and yearly intervals. In case the frequency is not specified, the top up will be processed with the default yearly frequency.
- iii. For Monthly SIP
 - a. Half yearly Top-up SIP under this option, the amount of investment through SIP installment shall be increased by the amount chosen /designated by investor post every 6th (sixth) SIP instalment
 - b. Yearly Top-up SIP under this option, the amount of investment through SIP installment shall be increased by the amount chosen /designated by investor post every 12th (twelth) SIP installment
- iv. Quarterly SIP
 - a. Yearly Top-up SIP under this option, the amount of investment through SIP installment shall be increased by the amount chosen /designated by investor post every 4th (fourth) SIP instalment. In case the investor who has registered under Quarterly SIP opts for Half yearly Top-up SIP the same shall be registered and processed as Yearly Top-up SIP.
- v. The top up cap amount should not exceed the maximum amount as mentioned in the NACH mandate. In case the top up cap amount exceeds the maximum amount as mentioned in the NACH mandate, then the lesser amount shall be considered as the default cap amount.
- vi. The Top-up details cannot be modified once enrolled. In order to make any changes, the investor must cancel the existing SIP and enroll for a fresh SIP with Top-up option.
- vii. In case the SIP top up is cancelled the SIP will continue to be processed with the last topped up amount till the SIP end date.
- Stamp Duty: Pursuant to Notification No. S.O. 1226(E) and G.S.R. 226(E) dated March 30, 2020 issued by Department of Revenue, Ministry of Finance, Government of India, read with Part I of Chapter IV of The Finance Act, 2019, notified on February 21, 2019 issued by Legislative Department, Ministry of Law and Justice, Government of India, a stamp duty @0.005% of the transaction value of units would be levied on applicable mutual fund inflow transactions, with effect from July 1, 2020. Accordingly, pursuant to levy of stamp duty, the number of units allotted on purchase transactions (including dividend reinvestment and switch-in) to the Unit holders would be reduced to that extent.



Systematic Transfer Plan

To be submitted mandatorily: 1. Your FATCA (Foreign Account Tax Con KYC acknowledgement is mandatory for all investors w.e.f. 01/01/20' including SIP is upto ₹ 50,000 per investor in any rolling 12-month pe	1. However in the case of	of Micro SIP/Purchase	of an individua	investor (if the to	otal amount	t of investment	ndividuals only Folio No	v) which can be do	wnloded from	our website.
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Contact No. 1860 425 7237 (India) +91 40 2345 2215 (NRI)	SM	S SFUND to	56767		E-mail	: custom (NRI): r	erservic riservic	es@sundar es@sundar	ammutu ammutu	ial.com
www.sundarammutual.com								Sundaram	Mutual	Fund



Systematic Transfer Plan

Signature

Declaration: I/We • having read and understood the contents of the Statement of Additional Information/Scheme Information Document/addenda issued to the SID and KIM till date • hereby apply for units under the scheme(s) as indicated in the application form • agree to abide by the terms, conditions, rules and regulations of the scheme(s) • agree to the terms and conditions for Auto Debit • have not received nor been induced by any rebate or gifts, directly or indirectly in making this investment • do not have any existing Micro SIPs/investments which together with the current application will result in the total investments exceeding ₹. 50,000 in a financial year or a rolling period of twelve months (applicable for PAN/Aadhar exempt category of investors). The ARN holder has disclosed to me/us all the commissions (in the form of trail commission or any other mode), payable to him for the different competing Schemes of various Mutual Funds from amonest which the Scheme is being recommended to me/us.

Applicable to NRIs only: Please (✓) ☐ I/We confirm that I am/We are Non-Resident of Indian Nationality/Origin and I/We hereby confirm that the funds for subscription have been remitted from abroad through normal banking channels or from funds in my/our Non-Resident External/Ordinary Account/FCNR Account on a ☐ Repatriation Basis ☐ Non-Repatriation Basis.

I/We hereby declare that all the particulars given herein are true, correct and complete to the best of my/our knowledge and belief. I/ We further agree not to hold Sundaram Asset Management, its sponsor, their employees, authorised agents, service providers, representatives of the distributors liable for any consequences/losses/costs/damages in case of any of the above particulars being false, incorrect or incomplete or in case of my/our not intimating/delay in intimating any changes to the above particulars. I/We hereby authorise Sundaram Asset Management to disclose, share, remit in any form, mode or manner, all/any of the information provided by me/us, including all changes, updates to such information as and when provided by me/us, to any Indian or foreign governmental or statutory or judicial authorities/agencies, the tax/revenue authorities and other investigation agencies and SEBI registered intermediaries without any obligation of advising me/us of the same. I/We hereby agree to provide any additional information/documentation that may be required in connection with this application.

Investors are requested to note the following terms and conditions with respect to availing STP facility:

1. Schemes available

For the purpose of **Daily STP**, all open ended equity funds and fixed Income funds are eligible as Transferor Scheme(s) or Transferoe Scheme(s).

For the purpose of Weekly, Monthly and Quarterly, all open ended fixed income funds are eligible as Transferor Scheme(s) and all open ended equity funds are eligible as Transferee Scheme(s).

Date of transfer

Daily interval (on all business days) for **Daily STP**. Investors should note that in case of Daily STP, the commencement date for transfers shall be the 15th working day from the date of receipt of a valid request and thereafter, transfers shall be effected on all business days at NAV based prices, subject to applicable load. Thus, in the event of an intervening non-business day (e.g. Saturday and Sunday), STP triggers will not take place and consequently the total number of Daily STP instalments opted by the investor will be adjusted to that extent i.e., for e.g. if the investor has opted for 20 instalments and if 5 non business days happen to occur in the intervening period, then only 15 Daily STP instalments shall be triggered. In view of the intervening non business days, investors are advised to extend the period by including possible non business days during the transfer period for covering the intended instalments.

Every Wednesday for **Weekly STP**. If Wednesday is a non-business day then on immediate next business day.

For **Monthly and Quarterly STP** on any date as chosen by the investor from the designated dates which are 1, 7, 14, 20 and 25.

Daily, monthly and quarterly STPs will start on a day as mentioned above falling not later than the 5th working day from the date of receipt of a valid request.

B. Minimum amount of transfer*

* The minimum STP amount is subject to minimum switch-out criteria for source scheme and minimum switch-in criteria for the target scheme. Kindly refer to respective SID for complete details

First / Sole

Second Applicant

Third

Applicant

Request Date

Applicant / Guardian

Daily: Investors are required to instruct for a minimum of 6 transfers of $\overline{\text{c}}.1000$ /- and in multiples of $\overline{\text{c}}.100$ /- thereafter.

Weekly: Minimum amount ₹ 1000 Minimum No of installments 6 Monthly: Minimum amount ₹ 100 Minimum No of installments 6 Minimum amount ₹ 750 Minimum No of installments 6

 Load Structure, for all frequencies, of the Transferor Scheme & Transferee Schemes as on the date of enrolment of STP shall be applicable.

5. Discontinuation of STP, for all frequencies

- a) STP will be automatically terminated if all units are liquidated or withdrawn from the Transferor Scheme or pledged or upon receipt of intimation of death of unit holder. Further, if the outstanding balance in "transferor Scheme" does not cover any of the STP instalment amount, all outstanding units will be liquidated and STP will be effected for such outstanding balance and STP will be terminated for subsequent instalments.
- b) Investors can also choose to terminate the STP by giving a written notice of at least 7 Business Days in advance to the Official Points of Transactions and accordingly, termination of STP shall be effected from 8th Business Day of receipt of valid request.
- The minimum SWP amount is subject to minimum switch-out criteria for source scheme and minimum switch-in criteria for the target scheme. Kindly refer to respective SID for complete details.
- The Trustee / AMC reserve the right to change / modify the terms of the STP or withdraw this facility from time to time.
- 8. Please refer to the respective scheme KIM / SID for more details.

Contact No. 1860 425 7237 (India) +91 40 2345 2215 (NRI)

SMS SFUND to 56767

E-mail: customerservices@sundarammutual.com (NRI): nriservices@sundarammutual.com

www.sundarammutual.com Sundaram Mutual Fund



Systematic Withdrawal Plan

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Systematic Withdrawal Plan

Declaration: I/We • having read and understood the contents of the Statement of Additional Information/Scheme Information Document/addenda issued to the SID and KIM till date • hereby apply for units under the scheme(s) as indicated in the application form • agree to abide by the terms, conditions, rules and regulations of the scheme(s) • agree to the terms and conditions for Auto Debit • have not received nor been induced by any rebate or gifts, directly or indirectly in making this investment • do not have any existing Micro SIPs/investments which together with the current application will result in the total investments exceeding Rs. 50,000 in a financial year or a rolling period of twelve months (applicable for PAN/Aadhar exempt category of investors). The ARN holder has disclosed to me/us all the commissions (in the form of trail commission or any other mode), payable to him for the different competing Schemes of various Mutual Funds from amongst which the Scheme is being recommended to me/us.

Applicable to NRIs only: Please (✓) ☐ I/We confirm that I am/We are Non-Resident of Indian Nationality/Origin and I/We hereby confirm that the funds for subscription have been remitted from abroad through normal banking channels or from funds in my/our Non-Resident External/Ordinary Account/FCNR Account on a ☐ Repatriation Basis ☐ Non-Repatriation Basis.

I/We hereby declare that all the particulars given herein are true, correct and complete to the best of my/our knowledge and belief. I/ We further agree not to hold Sundaram Asset Management, its sponsor, their employees, authorised agents, service providers, representatives of the distributors liable for any consequences/losses/costs/damages in case of any of the above particulars being false, incorrect or incomplete or in case of my/our not intimating/delay in intimating any changes to the above particulars. I/We hereby authorise Sundaram Asset Management to disclose, share, remit in any form, mode or manner, all/any of the information provided by me/ us, including all changes, updates to such information as and when provided by me/us, on any Indian or foreign governmental or statutory or judicial authorities/agencies, the tax/revenue authorities and other investigation agencies and SEBI registered intermediaries without any obligation of advising me/us of the same. I/We hereby agree to provide any additional information/documentation that may be required in connection with this application.

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Second Applicant							
Third Applicant							
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Contact No. 1860 425 7237 (India) +91 40 2345 2215 (NRI)

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Sundaram Mutual Fund