

Systematic Transfer Plan

Sundaram Mutual Fund

To be submitted mandatorily: 1. Your FATCA KYC acknowledgement is mandatory for all including SIP is upto Rs 50,000 per investor	investors w.e.f. 01/01/2011	. Howeve	er in the c	ase of Mic	cro SII	IP/Pru	ichase o	f an indiv	vidual	investor	(if the	e tot	al ar	nount	of in	vestr	nen		olio		/) Wn	ich ca	an b	e dow	nloc	led tro	om ou	ır wel	Usite.
Distributor's ARN & Name	Sub-broker (Sub-broker's ARN							EUIN* Unique Idendification Number)						Transaction charges For Rs. 10,000 and above: ☐ Existing Investor-Rs.100														
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* Declaration for "Execution only" transcation (only wher by the employee/relationship manager/sales person of the a	e EUIN box is left blank) I/We has bove distributor/sub broker or notwi	ereby confir thstanding th	m that the EU ne advice of i	JIN box has l inappropriate	been int eness,if a	tentiona any, pro	ally left bl ovided by	ank by me/u the employe	is as this ee/relatio	transaction onship mar	n is exec nager/sal	cuted v les per	witho rson c	ut any i f the di	nteracti stributo	on or r/sub b	advic broke	r. b	v t	ont o	inve	estoi	r to	o th	e.	4MF	l-re	giste	ered
First/Sole Applicant/ Guardian		Third Applicant															distributors based on the investors' assessment of various factors including services rendered by the distributor.												
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Name of Guardian in case First / Sole Appl	icant is a Minor (capital Letters								П		П					T	Ī	T	Ť	Ť	Ť	T	Ť					T	
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You will receive an account s	tatement by e-mail	. If you	u wish	to rec	eive	еар	hysio	al stat	teme	nt ple	ease	tic	k [
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www.sundarammutual.com



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

1. Schemes available for Daily STP

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

2. Date of transfer

Daily Interval (on all business days). 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.

3. Minimum amount of transfer

Investors are required to instruct for a minimum of 20 transfers of Rs.1000/- and in multiples of Rs.100/- thereafter.

4. Load Structure of the Transferor Scheme & Transferee Schemes as on the date of enrolment of STP shall be applicable.

5. Discontinuation of Daily STP

- a) Daily 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 Daily STP instalment amount, all outstanding units will be liquidated and Daily STP will be effected for such outstanding balance and Daily STP will be terminated for subsequent instalments.
- b) Investors can also choose to terminate the Daily STP by giving a written notice of at least 7 Business Days in advance to the Official Points of Transactions and accordingly, termination of Daily STP shall be effected from 8th Business Day of receipt of valid request.
- 6. The provision of 'Minimum redemption amount' specified in the SID of Transferor Scheme and 'Minimum application amount' specified in the SID of the Transferee Schemes will not be applicable for Daily STP.
- 7. The Trustee / AMC reserve the right to change / modify the terms of the Daily 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 44 4083 1500 (NRI)

SMS SFUND to 56767

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

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