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Please refer to Product labelling details available on cover page and Your Guide To Fill The Application Form (pages 21-23) before proceeding

Channel Partner / Agent I	nformati	on					Serial No:EQ	
Distributor's ARN & Name	Sub-bro	oker's ARN (code)	Sub-broker Code	(internal)		UIN*		noturo
58603					(Employee Unique	Idendification Number)	ISC's sig	gnature
VRIDHI					E 026	5768	Ŏ T	-
							Time Sta	amping
* Declaration for "Execution EUIN box has been intentiona								
the employee/relationship ma	nager/sale	es person of the ab	ove distributor/sub	broker or not	withstandir	ng the advice of	Transaction charges For F	
inappropriateness, if any, prov	ided by th	e employee/relation	ship manager/sales	s person of th	e distributo	or/sub broker.	Upfront commission sl by the investor to th distributors based of	hall be paid directly
First/Sole Applicant/ Guardian		Second Applicant		Third Applicant			distributors based assessment of variou	on the investors' s factors including
							services rendered by t	
1. Existing Investor Inform Please note that applica	•					Folio No		
KYC compliant Yes								
2. New Investor Informa	•							
Name of First/Sole Applic	ant Gend	der 🗌 Male 🗆 Fen	nale 🗆 Others	1 1	1 1			
Permanent Account Number (F				Date of Birt		MMYYY		ached (Mandatory)
Name of Guardian (in case	e of First /	/ Sole Applicant is	a Minor)/Contact	Person-De	signation	(in case of non-ii	ndividual Investors) / P	OA Holder Name
Permanent Account Number (F				Relations	hip		∐ KYC Proof att	ached (Mandatory)
Father's name (mandatory	if PAN no	ot provided)						
Go Green Services (Save T	he Future	e): Please provide	Contact Details of	f First / Sole	Applicant			
E-Mail								
STD Code		Telephone				Mobile		
Default Communication mo	de is E-m	nail only, if you wis	h to receive follow	ing docume	nt(s) via ph	iysical mode: Ple	ease tick (✔)	
□ Account Statement □ An	nual Rep	ort 🗆 Other Statuto	ory Information					
Mode of Holding [Please	(✔)] □S	ingle 🗌	Joint	□ Anyone o	Survivor			
Address of First / Sole Ap	plicant							
Томан		CITY/					PIN	
TOWN		DISTRICT		SI.	ATE		CODE	
Overseas Address (in case	e of NRIs/	/FIIs) (Mandatory)						
Name of Second Applicar	π				1 1			
Permanent Account Number (F	PAN)			Date of Birt	h D D	MMYYY	Y C KYC Proof att	ached (Mandatory)
Name of Third Applicant								
Permanent Account Number (F	PAN)			Date of Birt	h D D	MMYYY	Y 🛛 🖓 🖓 Y	ached (Mandatory)

3. KYC details (Mandatory) (refer in	nstruction 3) 🗆 Ind	ividual 🗆 No	on-Individual (Please attac	ch mandatory Ultimate	Beneficial Ownership (UBO) declaration form
Status of First/Sole Applicant [Please ()]</th <th>Occupation Details [Ple</th> <th>()2</th> <th>Gross Annual Income (in ₹</th> <th></th> <th>PEP Status</th>	Occupation Details [Ple	()2	Gross Annual Income (in ₹		PEP Status
Listed Company	(To be filled only if the ap	. ,	First App	licant	First Applicant
Unlisted Company		Applicant	Below 1 Lac	1-5 Lacs	For Individuals [Please (✓)] Politically Exposed Person (PEP) Status (Also applicable for authorised
Individual	Government Service		□ 5-10 Lacs	□ 10-25 Lacs	signatories/Promoters/Karta/Trustee/Whole time Directors)
Minor through guardian	Professional	Agriculturist	\square > 25 Lacs - 1 Crore	$\square > 1$ Crore (or)	🗆 I am PEP
□ HUF	Retired	Housewife	Net-worth (Mandatory for no	on-individuals) ₹	□ I am related to PEP □ Not Applicable
Partnership	□ Student	□ Forex Dealer		as on	For Non-Individuals providing any of the below
□ Society/Club	Others	(please specify)	IDIDIMIMIYIYIYIYI		mentioned services [Please (/)]
Company		Public Sector Service	year)		□ Gaming/Gambling/Lottery/Casino Services
Body Corporate	Government Service	□ Business	Second Ap	oplicant	Money Lending/Pawning
□ Trust	Professional	Agriculturist	□ Below 1 Lac	1-5 Lacs	□ None of the above
Mutual Fund	Retired	□ Housewife	☐ 5-10 Lacs	10-25 Lacs	Second Applicant
	□ Student	□ Forex Dealer	□ > 25 Lacs - 1 Crore		(To be filled only if the applicant is an individual)
	Others	u 1 37			
NRI-Repatriable		Applicant	□ > 1 Crore (or) Net-worth		I am related to PEP
□ NRI-Non-Repatriable		Public Sector Service During and	Third App	olicant	Not Applicable
□ FII/Sub account of FII	Government Service		Below 1 Lac	1-5 Lacs	Third Applicant
Fund of Funds in India	Professional Retired	□ Agriculturist □ Housewife	□ 5-10 Lacs	□ 10-25 Lacs	(To be filled only if the applicant is an individual) □ I am PEP
🗆 QFI	□ Student	Forex Dealer	□ > 25 Lacs - 1 Crore		□ I am related to PEP
Others (please specify)	Others	(please specify)	□ > 1 Crore (or) Net-worth		□ Not Applicable

4. FATCA-CRS DETAILS For Individuals & HUF (Mandatory) Non Individual investors should mandatorily fill separate FATCA-CRS Annexure The below information is required for all applicant(s) / guardian / PoA holder

Category	First Applicant/Guardian	Second Applicant	Third Applicant
1. Are you a Tax Resident of Country other than India?	Yes No	🗌 Yes 🔲 No	🗌 Yes 🗌 No
2. Is your Country of Birth/ citizenship other than India?	Yes No	🗌 Yes 🔲 No	🗌 Yes 🗌 No
3. Is your Residence address / Mailing address / Telephone No. other than in India?	🗌 Yes 🗌 No	🗌 Yes 🗌 No	🗌 Yes 🗌 No
4. Is the PoA holder / person to whom signatory authority is given, covered under any of the categories 1, 2 or 3 above?	🗌 Yes 🔲 No	🗌 Yes 🔲 No	🗌 Yes 🗌 No
If you have answered YES to	any of above, please provide the below	w details	
Country of Tax Residence			
Nationality			
Tax Identification Number ^{\$} or Reason for not providing TIN			
Identification Type (TIN or Other, please specify)			
Residence address for tax purposes (include City, State, Country & Pin code)			
Address Type	 □ Residential or Business □ Residential □ Business □ Registered Office 	 □ Residential or Business □ Residential □ Business □ Registered Office 	 □ Residential or Business □ Residential □ Business □ Registered Office
City of birth			
Country of birth			

\$ In case any of applicant being resident/ tax payer in more than one country, provide tax identification number for each such country separately.

FATCA-CRS Instructions

Details under FATCA-CRS/Foreign Tax Laws: The Central Board of Direct Taxes has notified Rules 114F to 114H, as part of the Income Tax Rules 1962, which Rules require Indian financial institutions such as the Bank to seek additional personal, tax and beneficial owner information and certain certifications and documentation from all our account holders. In certain circumstances (including if we do not receive a valid self-certification from you) we may be obliged to share information on your account with relevant tax authorities/appointed agencies. If you have any questions about your tax residency, please contact your tax advisor. Should there be any **change in any information provided by you, please ensure you advise us** promptly, **i.e.**, **within 30 days**. Towards compliance, we may also be required to provide information to any institutions such as withholding from the account or any proceeds in relation thereto. As may be required by domestic or overseas regulators/ tax authorities, we may also be constrained to withhold and pay out any sums from your account or close or suspend your account(s).

If you are a US citizen or resident or greencard holder, please include United States in the Country of Tax Residence field along with your US Tax Identification Number. Foreign Account Tax Compliance provisions (commonly known as FATCA) are contained in the US Hire Act 2010. It is mandatory to supply a TIN or functional equivalent if the country in which you are tax resident issues such identifiers. If no TIN is yet available or has not yet been issued,

please provide an explanation with supporting doucments and attach this to the form.

Bank Account Details of First/Sole Applicant (as per SEBI Regulations it is mandatory) (refer instruction 5)

Account No																						
Name of the Bank									Branch	I												
Branch Address									Bank C	City (re	demptic	n will b	e payab	le at thi	s locatio	n)						
Cheque MICR No				Ac	count	Туре	[Plea	ase 🗸	Savings	🗆 Cı	urrent	□N	RE* [] NR	0* □	FCN	R* 🗆	Othe	rs			
RTGS / NEFT / IFS	C Code								e payme please p							nd is	not o	clear	on t	he C	hequ	e

6. Mode of payment of redemption/dividend proceeds via Direct credit/NEFT/Other Mode (refer instruction 6).

Direct Credit is now available with: Axis Bank, BNP Paribas Bank, Citibank, Deutsche Bank, HDFC Bank, HSBC Bank, ICICI Bank, IDBI Bank, IndusInd Bank, ING Vysya, Kotak Mahindra Bank, Royal Bank of Scotland, SBI, Standard Chartered Bank, YES Bank. If your bank falls in this list your Redemption/ Dividend proceeds will be directly credited to your account. Alternatively, you will receive the payment through NEFT mode based on the bank details available. Otherwise, payment will be made by way of a cheque/demand draft/warrant.

7. Payment Details: Please issue a separate Cheque/Demand Draft favouring the scheme you wish to invest/One Time Mandate (OTM) (refer instruction 7)

			Amount Invested	Net Amount	Payment Details			
Scheme Name	Plan	Option	(less DD charges)	Paid	OTM Cheque / DD Number	Bank/Branch		
	□ Regular □ Direct							
	□ Regular □ Direct							
	□ Regular □ Direct							

In case of third party payment (refer instruction 7): Please download (www.sundarammutual.com) and attach the third party declaration form

8. DEMAT Account Details (refer instruction 8)

□ National Securities Depository Ltd.	Depository Participant
Central Depository Services (India) Ltd.	DP ID Number

Investor willing to invest in Demat option, may provide a copy of the DP Statement enabling us to match the Demat details as stated in the application form.

9. Please indicate details of your SIP (refer instruction 9) (skip this section if you wish to make a one-time investment)

Mode of SIP Dest-dated cheques (please provide the details below) DOTM/Auto Debit (please submit SIP Registration Form)

SIP Period (For Po	ost-Dated Cheques)	SIP Date	SIP Frequency			
SIP Starting M Y Y Y	SIP Ending M Y Y Y	for Monthly/Quarterly frequency only 1 7 14 20 25	 Weekly (Minimum amount Rs 1000 Every Wednesday. Minimum No of installments 5) Monthly (Minimum amount Rs 250 Minimum No of installments 20) Quarterly (Minimum amount Rs 750 Minimum No of installments 7) 			
No. of PDCs	First SIP Cheque No		Last SIP Cheque No			
Each SIP Amount Rs Refer Guide to investing through SIP						
		Turn overleaf for l	Declaration & \ll Signature (Mandatory) \rightarrow \rightarrow			

Acknowledgement Sundaram Asset Management Company Limited, II Floor, 46 Whites Road, Chennai - 600 014. Toll Free 1800 103 7237 (India) +91 44 49057300 (NRI)	Serial No: EQ
Received From Mr./Mrs./Ms.	
Communication in connection with the application should be addressed to the Registrar Sundaram BNP Paribas Fund Services Limited , Registrar and Transfer Agents, Unit: Sundaram Mutual Fund, Central Processing Center, RR Towers, II III Floor. Thiru Vi Ka Industrial Estate, Guindy, Chennai 600 032, Toll Free 1800 103 7237 (India) +91 44 49057300 (NRI).	ISC's Signature & Stamp

Application Form

1st Nominee	2nd Nominee	3rd Nominee
Name:	Name:	Name:
Address:	Address:	Address:
Proportion (%)* in which units will be shared by first nominee% If nominee is a minor: Date of birth:Relationship: Name of Guardian: Address of Guardian: * Proportion (%) in which units will be shared by each nominee should aggr		nominee% If nominee is a minor: Date of birth:Relationship:
\Box l do not wish to choose a nominee. Signature o		
1st / Sole Applicant / Guardian	2nd Applicant	3rd Applicant

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 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 (\checkmark) \Box 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 \Box Repatriation Basis \Box Non-Repatriation Basis. I/We further declare that I/We am/are not a citizen of Canada.

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, 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.

Certification: I/We have understood the information requirements of this Form (read along with the FATCA-CRS Instructions), stated in pages 1-30 and hereby certify that the information provided by me/us on this Form is true, correct, and complete. I/We also confirm that I/We have read and understood the FATCA-CRS Terms and Conditions and hereby accept the same.

I/We agree to indemnify Sundaram Asset Management Company Limited in respect of any false, misleading, inaccurate and incomplete information regarding my/our "U.S. person" status for U.S. federal income tax purposes. or in respect of any other information as may be required under applicable tax laws.

Name of First / Sole Applicant / Guardian	Name of Second Applicant	Name of Third Applicant
Signature of First / Sole Applicant / Guardian	Signature of Second Applicant	Signature of Third Applicant

Place:....

Particulars											
Scheme Name / Plan / Option / Sub-option	Goal	Cheque / DD / Payment Instrument Number / Date	Drawn on (Name of Bank & Branch)	Amount in figures (₹) & Amount in words							
	Lumpsum Purchase										
	□ SIP										

 Please tick ☑ as applicable: □ Auto Debit Form is attached and to be registered in the folio. SIP Auto debit will start after mandate registration which takes Ten days. □ Auto Debit Form is already registered in the folio. [No need to submit again]. 	iro
□ Auto Debit Form is already registered in the folio. [No need to submit again].	
	ng
Distributor's ARN & Name Sub-broker's ARN (code) Sub-broker Code (internal) EUIN* For Office use only Employee Unique Idendification Number) EUIN* For Office use only	
58603 E 026768	
We confirm that the EUIN box is intentionally left blank by me/us as this is an "execution-only" transaction without any interaction or advice by the distributor personnel concerned. Upfront commission shall be paid directly by the investor to the AMFI registered Distributors based on the investors' assessment of various factors including the service rendered by the distributor. Sole/First Applicants's Signature Mance Investor Name	latory
Existing Investor-Folio No. New Investor-Application No.	
PAN/PEKRN & KYC Sole/First Applicant/Guardian Second Applicant/Guardian Third Applicant/Guardian	
Please tick 🗹 🗌 SIP Registration 🗌 SIP with Top-up Registration 🗌 SIP - Change in Bank Details (Please provide copy of cancelled cheque and methods) (Please provide cheque and methods) (Please provide copy of cancelled cheque and methods) (Please provide copy of cancelled cheque and methods) (Please provide chequ	
KYC compliant ☐ Yes ☐ No (if no, please provide KYC proof/additional documents if not submitted earlier)	le.)
No SiP Date Frequency SiP Top Up (Uptional) Start Month/Year (Defa	Month/Year ult Dec 2031)
1 Ist 7th 14th Weekly Top-up amount [§] 20th 25th Monthly* Rs	Y Y Y Further Not
2 1 st 7 th 14 th 2 ^{oth} 2 ^{5th} 1 st 7 th 14 th Monthly* 2 ^{oth} 2 ^{5th} 1 ^{op} up amount [§] Norup Arequery A Haif yearly 1 ^{op} up Arequery 1 ^{op} up A	Y Y Y Further Not
3 1 st 7 th 14th Weekly Top-up amount \$ monthly* Rs	VYYY Further Not
Default frequency; #The date may be taken as 31/12/2031 in case the bank needs to input a specific date in their system (refer Guide to investing through SIP)	
^{\$} The amount should be in multiples of Rs. 500 only; [^] Quarterly SIP offers top-up frequency at yearly intervals only DEMAT Account Details	
□ National Securities Depository Ltd. Depository Participant □ Central Depository Services (India) Ltd. DP ID Number Beneficiary Account Number	
Investor willing to invest in Demat option, may provide a copy of the DP Statement enabling us to match the Demat details as stated in the application for Declaration: //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 Signatures for PAN exempt category of investors). The ARN holder has disclosed to me/us. We hereby acleare 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, it sponsor, their employees, suthorised agents, service providers, representatives of the distributors liable for my consequences/losses/costs/damages in case of any when provided by me/us, to any lodiar on foreing overmment do reging overmentation at or statutory or judicial autorities and during all reinformation/documentation that may be required in when provided by me/us, to any lodiary of reging govermentation states to such information agencies and set registered intermediaries without any obligation of advising me/us of the same. We hereby agree to provide any additional information/documentation that may be required in this application.	
Auto Debit Form-NACH/OTM Registration	
For office use only SUNDARAM MUTUAL UMRN Date D M	YYY
ick (🗸) Sponsor Bank Code HDFC0000060 Utility Code HDFC01685000013642	
I/We herby authorise SUNDARAMMUTUALFUND to debit Tick (ers
Cancel Bank Account No	
/ith Bank Name of customers bank IFSC I OF MICR OF MICR	
amount of ₹ (in words)	
REQUENCY I Monthly Quarterly Half Yearly Yearly As & when presented DEBIT TYPE Fixed Amount Maximum	n Amount
eference 1 Folio No Phone No	
eference 2 Application No Email ID Email ID agree for the debit of Mandate processing charges by the Bank whom I am authorizing to debit my account as per latest Schedule of charges of ERIOD	the Bank.
om D M Y Y Y om D M M Y Y Y Signature Primary Account holder Signature Account holder	der
r 🗆 Until Cancelled 🔰 1 Name as in bank records 2 Name as in bank records 3 Name as in bank reco	rds
his is to confirm that the declaration has been carefully read,understood and made by me/us.1 am authorising the user entity/corporate to debit my account. have understood that I am authorised to cancel/amend this mandate by appropriately communicating the cancellation/amendment request to the user entity/corporate or the bank where i have authorized the debit.	

We hereby declare that the above information is true and correct and that the mobile under applicable laws, now or subsequent to the date hereof, I/We use in the ordinary course. I/We hereby declare that, irrespective of my/our registration of the above mobile in the provider customer preference register, or in any similar register maintained under applicable laws, now or subsequent to the date hereof, I/We consent to the Bank communicating to me/us about the transactions carried out in my/our aforesaid account(s).