SUNDARAM MUTUAL
Sundaram Finance Group

Mar 2026

SUNDARAM ASSET MANAGEMENT COMPANY

Corporate Presentation

SUNDARAM MUTUAL
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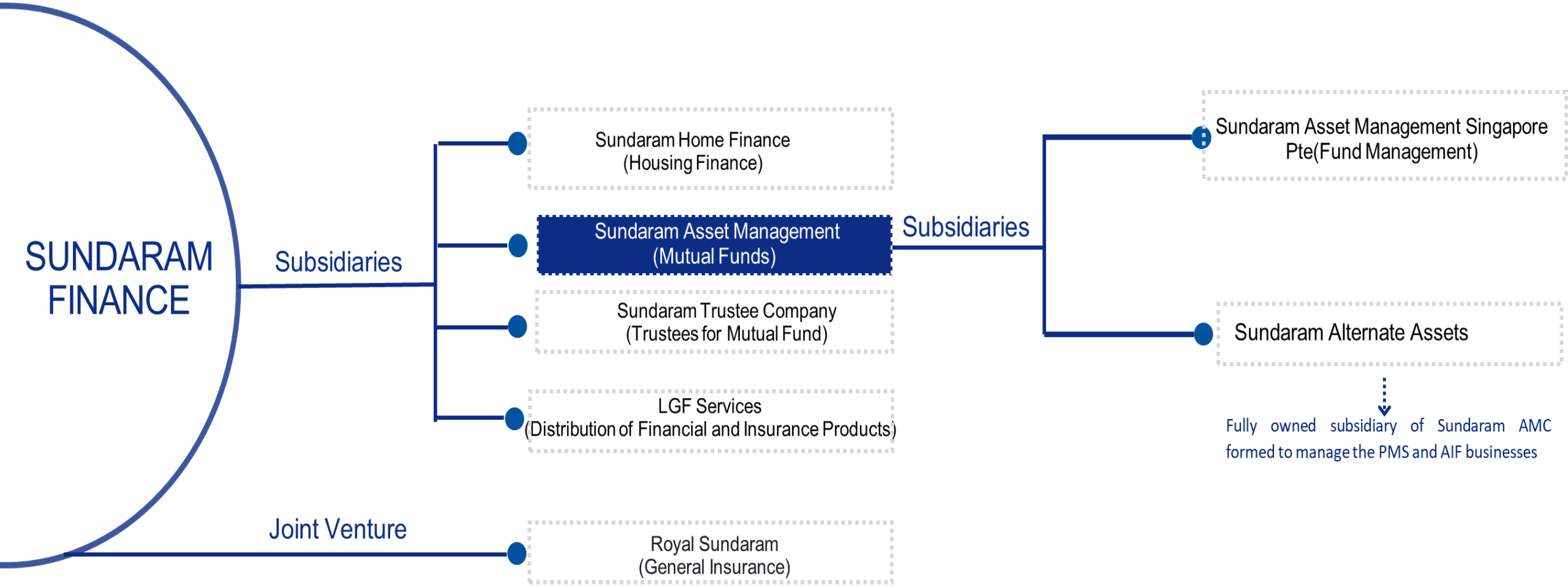
SUNDARAM ASSET MANAGEMENT

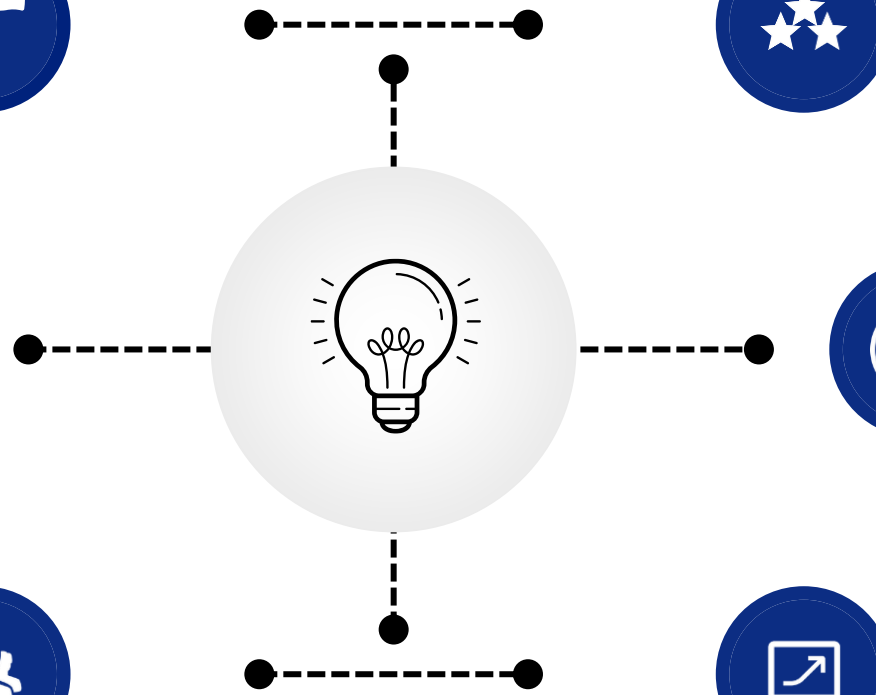
Our Parentage



Parent Profile – Key Facts of Sundaram Finance

Pioneer in the leasing and hire purchase business

Deposits rated AAA by CRISIL and ICRA



First NBFC to be listed in 1972

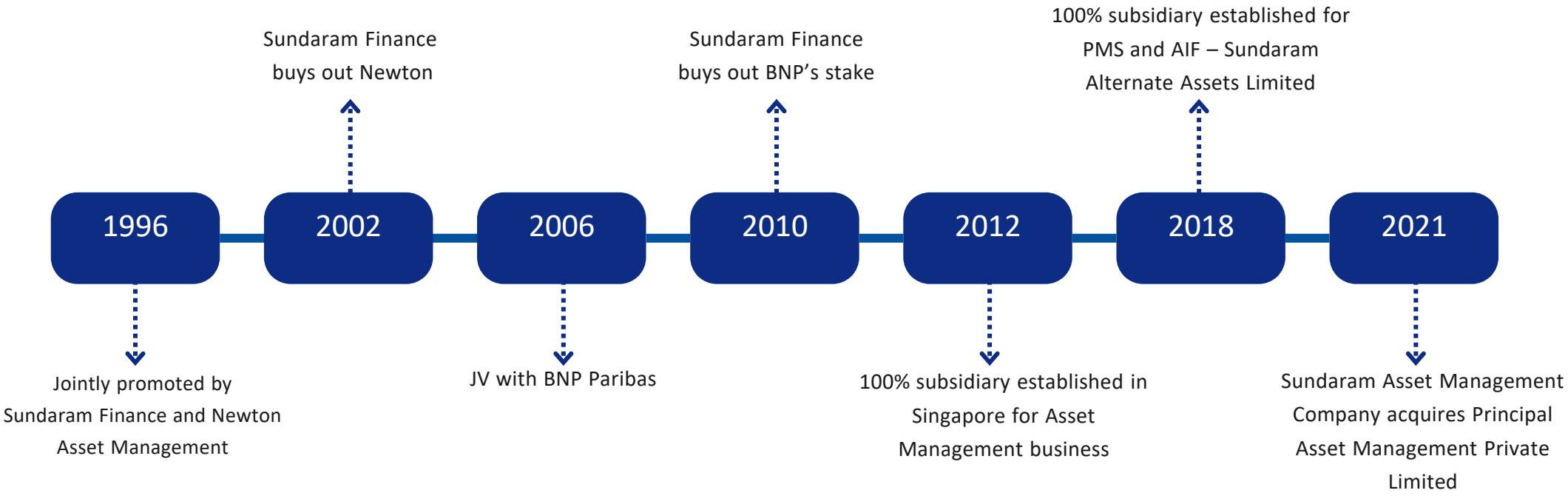
Market Cap around Rs 55,000 Crore

710 offices, 7,300+ employees (including off roll)

Market cap has grown at CAGR of ~26% since 2001

Source : In house calculations as of March 31, 2026

Our Journey



Sundaram Mutual AUM - ~Rs 69,100 crores as on 31 Mar 2026

AUM has grown at a CAGR of 13.3% over last 10 years

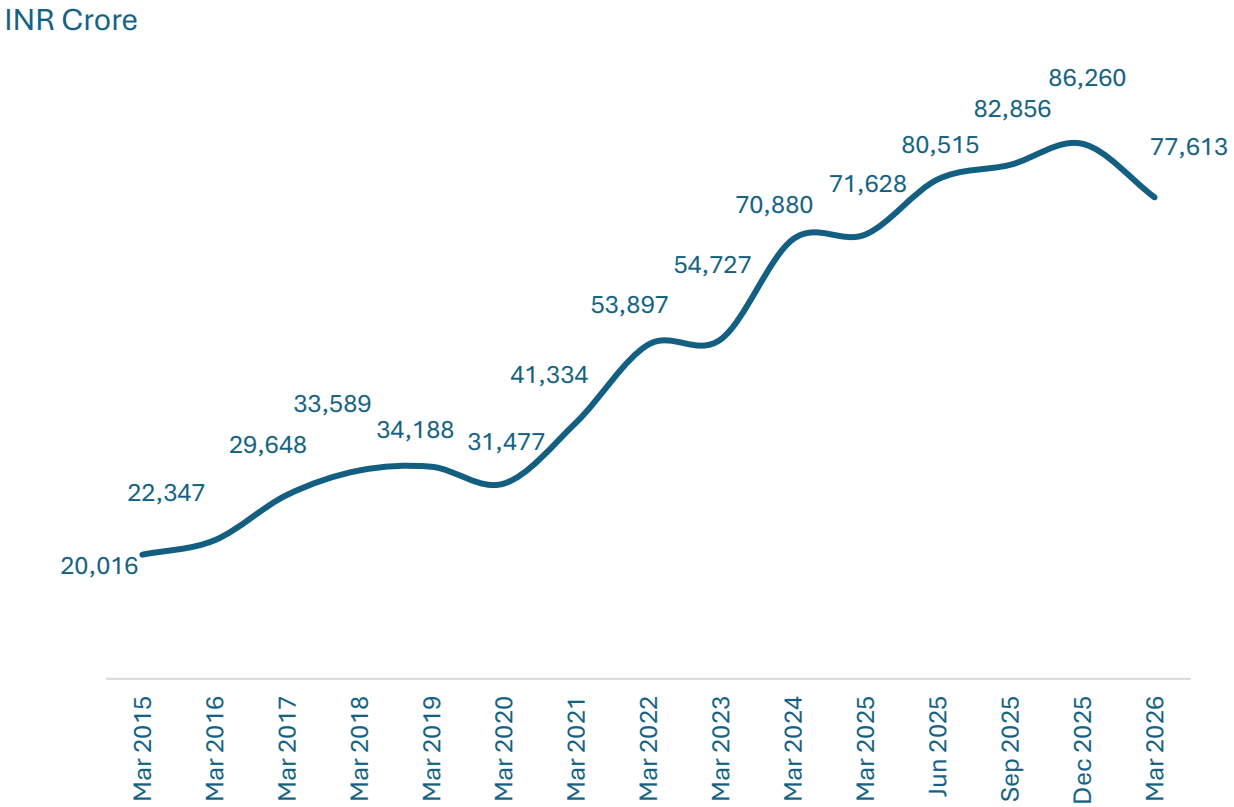
Ranked 21st* in the Asset Management Industry

*Ranking based on Quarterly Average AUM - Dec 31, 2025 – Mar 31, 2026

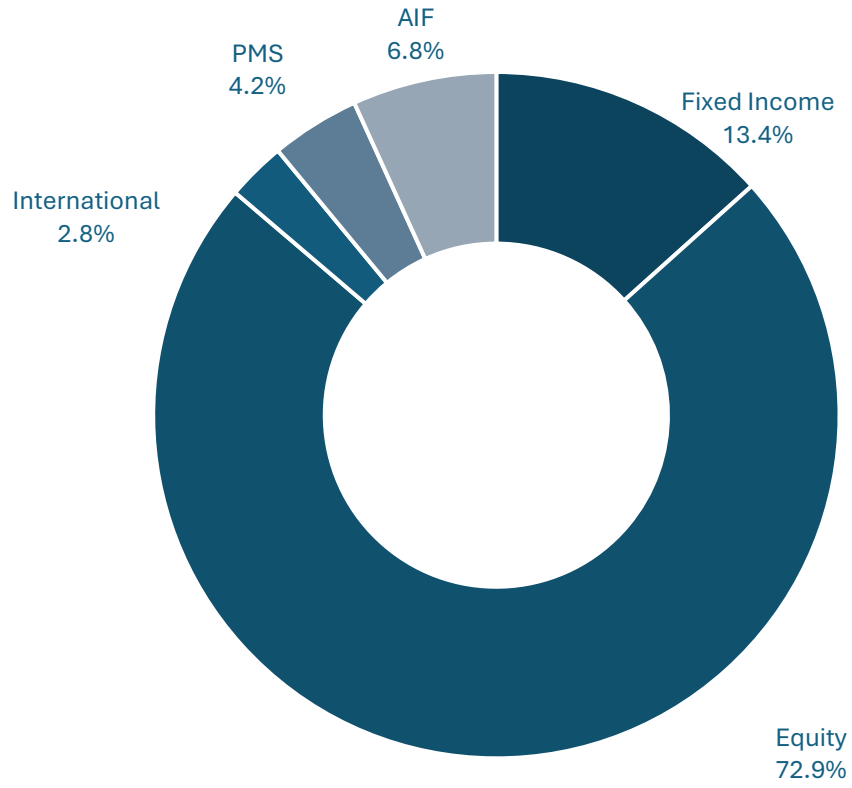
Source : AMFI

Sundaram Asset Management – Over 25 Years in Wealth Management

AUM growth



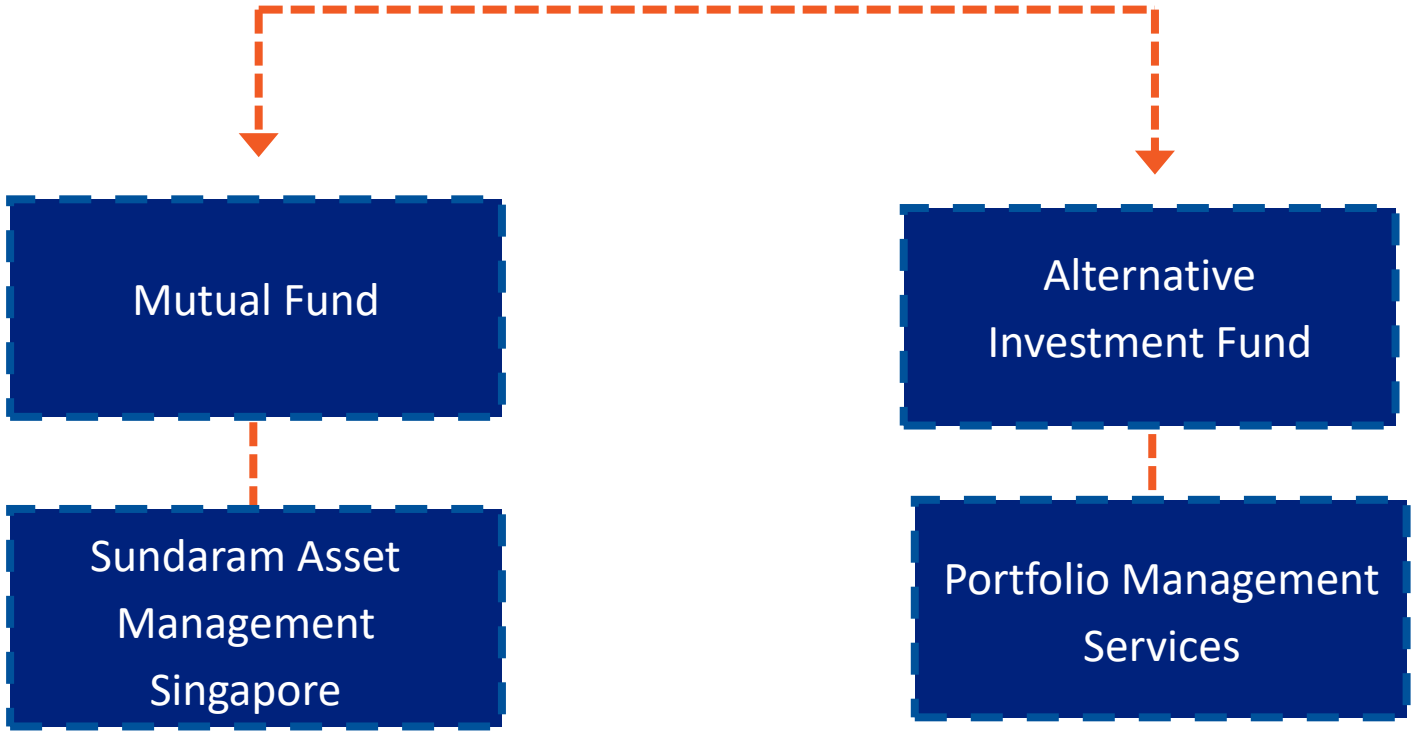
AUM composition



Data Source: In-house calculations as on March 31, 2026

Sundaram Asset Management – 25 Years in Wealth Management

SUNDARAM ASSET MANAGEMENT



1996: Promoted by Sundaram Finance Ltd – Currently 100% subsidiary

2018: 100% subsidiary established for PMS/AIF – Sundaram Alternates

Recent awards and recognition

Asia's Top 100 Money Managers 2017 by Institutional Investor Magazine

The Economic Times Best BFSI Brands 2018, 2019, 2021

The Economic Times Best Brands 2019

YouTube Creator Studio Silver Award (2020) for reaching over 100,000 subscribers and sharing original content

Best Brand Award at the Tamil Nadu Brand Leadership Awards 2020 by the World Marketing Congress

Innovative Launch Campaign of the Year 2020 for Sundaram Large Cap Fund (Formerly known as Sundaram Bluechip Fund) at the Global Marketing Excellence Awards by the World Marketing Congress

The Economic Times Best Digital Brands 2021

The Economic Times Iconic Brands of India 2022

Sundaram Tax Savings Fund has won DSIJ's 2022 Mutual Fund Award under the Best ELSS Fund Category.

Our Flexi Cap NFO has been awarded the Marketing Campaign of the Year (2022) at the Tamil Nadu Brand Leadership Awards by the World Marketing Congress.

Sundaram Mutual bags The Great Indian BFSI Marketing Campaign of the Year for Sundaram Flexi Cap Fund at the Great Indian BFSI Awards 2023

Won the Great Indian BFSI Digital Marketing Campaign of the Year 2024 for Sundaram Multi Asset Allocation Fund NFO at the 4th Edition of the Great Indian BFSI Awards 2024 hosted by the BFSI Digital Stallions Forum

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Sundaram Finance Group

OUR OFFERINGS - MUTUAL FUND

Strong retail footprint

Customer footprint

21L+

customers

4L+

customer transactions per month through Systematic Investment Plan*

Distributor footprint

75K+

empaneled distributors

Our branches across India

Data Source: In house calculations, March 31, 2025
Extrapolated Data vs December 31, 2026

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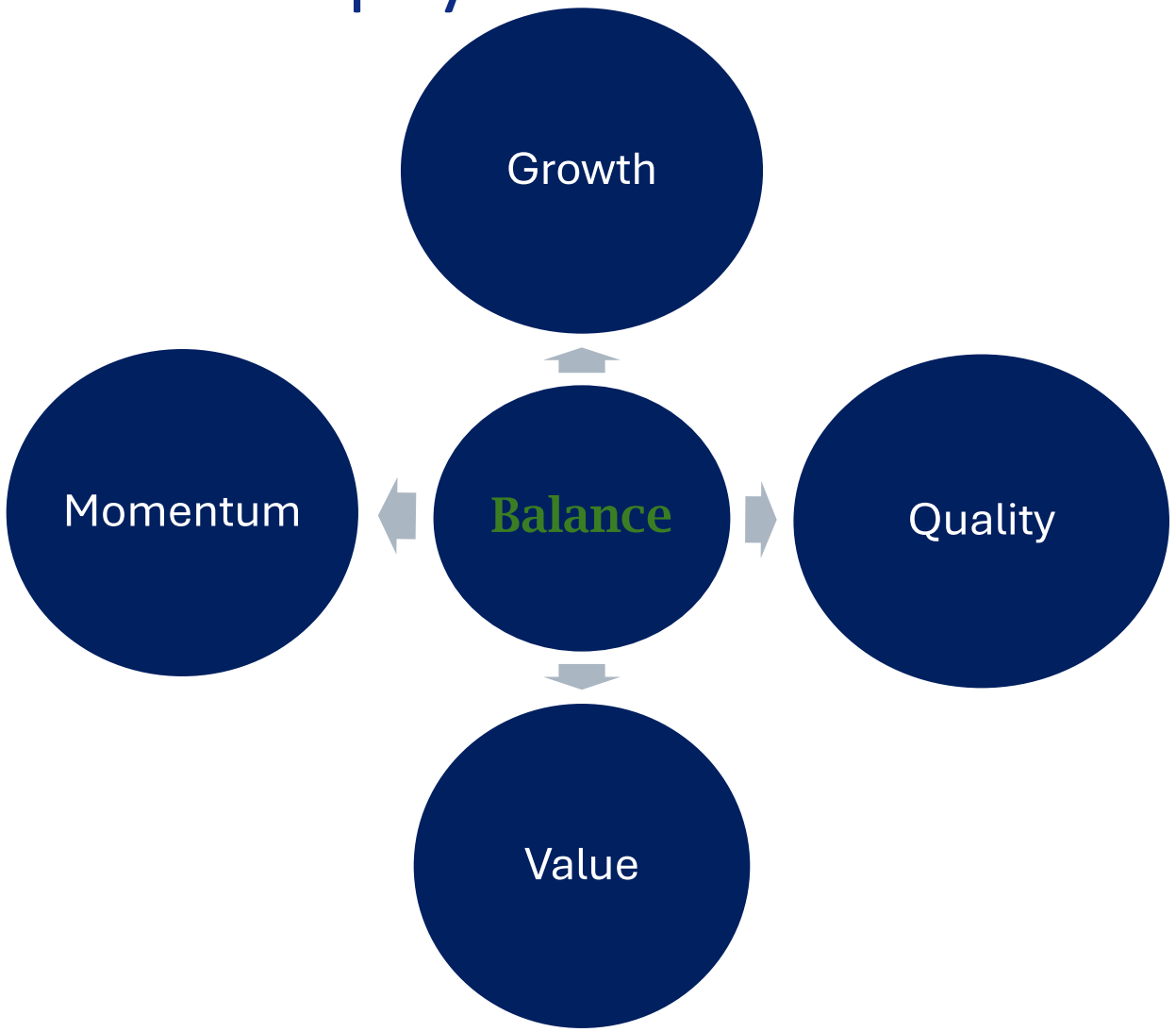
OUR OFFERINGS -

EQUITY

Philosophy & Mission



Our aim is to

Deliver superior *risk-adjusted-return* over *medium to long term* by

Following a *balanced approach* of investing in Consistent and Cyclical *Growth* businesses that have *superior Quality*

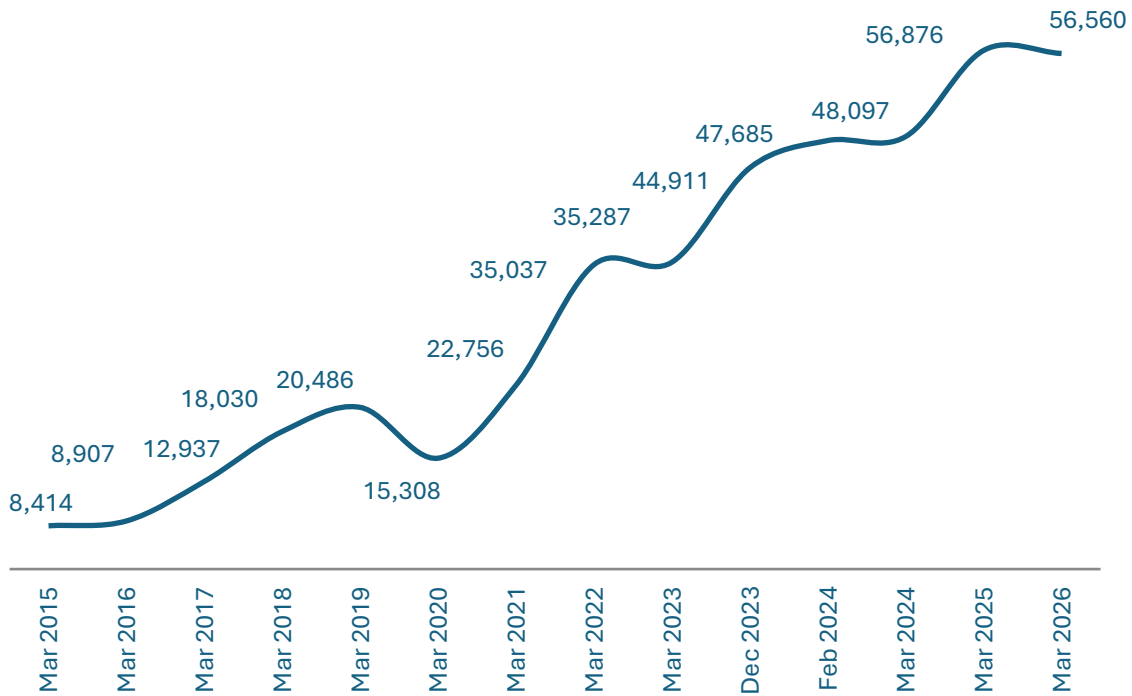
We aim to have reasonable *margin of safety* in our investments & avoid growth/value traps

To Develop Knowledge & Analytical *Edge* over market *consistently*.

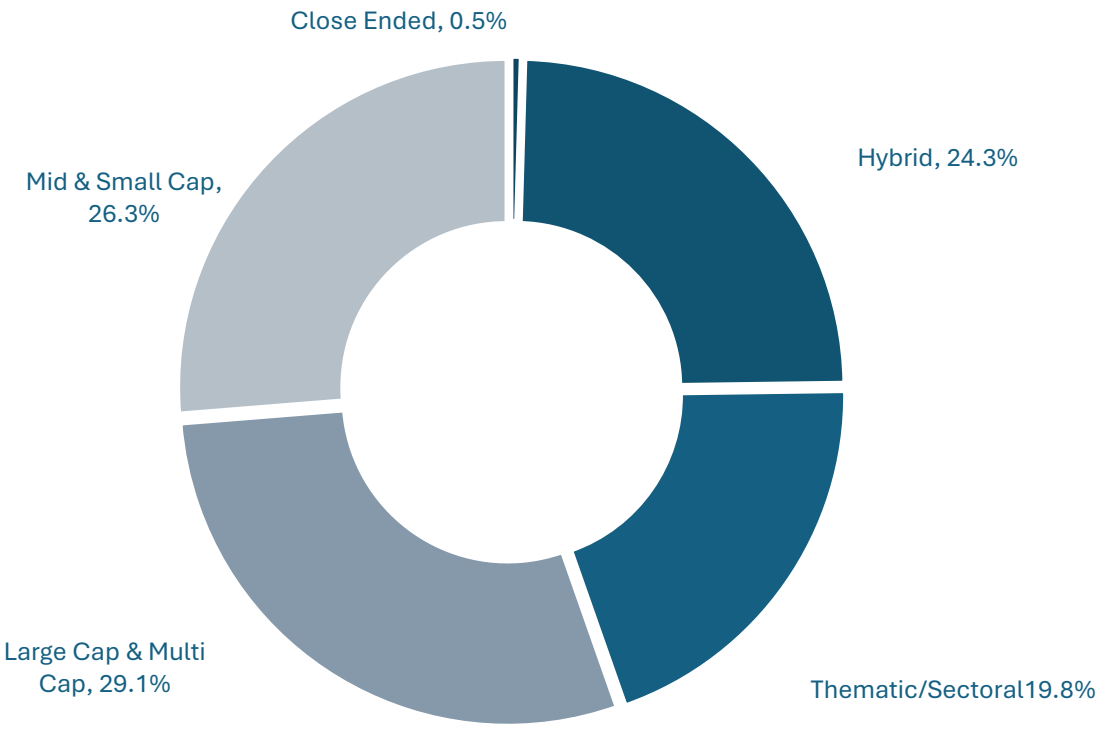
Assets under management

AUM growth

INR Crore



AUM composition



Data Source: In-house calculations as on March31, 2026

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FIXED INCOME

Investment philosophy and process

Philosophy

Invest predominantly in high credit quality companies

Manage funds strictly to mandate

Process

1. Form a view on interest rates and determine the optimum duration of the portfolio accordingly.
2. Decide on weights of AAA rated instruments and Sub-AAA rated instruments based on maturities, spreads and liquidity.

3
member credit team

~120
companies covered in credit universe

Credit appraisal process

STEP 1

Analysts undertake research on the investee companies and submit their report /along with on maximum long term and short-term exposure limits to the Internal Credit Committee.

STEP 2

On approval by the Internal Credit Committee (minimum two members) which consists of the MD, COO, Head of Risk Management, Head of Credit and the CIO – Fixed Income, the prospective company get added to the Investment universe after which it is available for investment by the Fund Managers

Credit Process

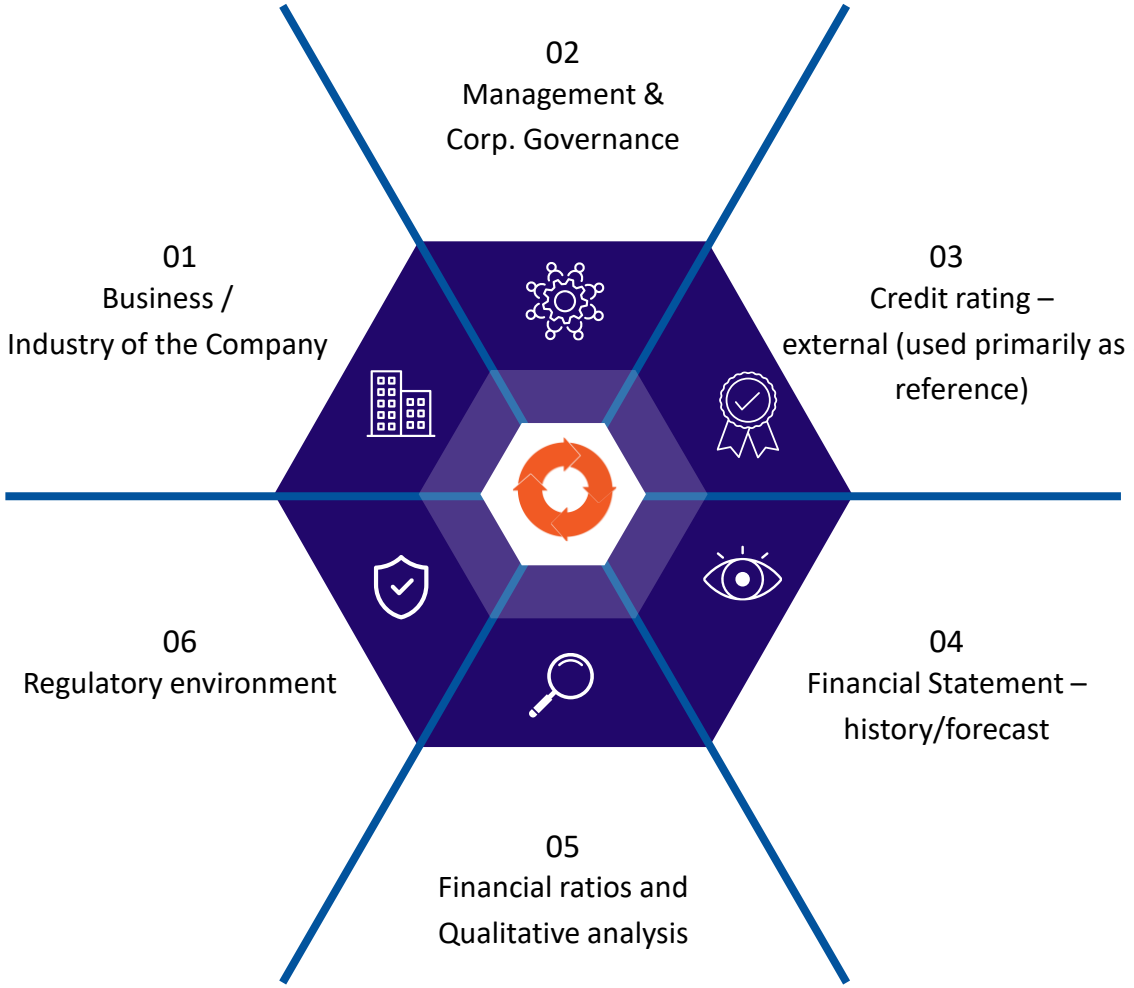
- 01

The Credit Analyst Team sets and monitors the exposures –exposures are split between short and long term.

- 02

Credit analyst reviews each issuer limits on a regular basis.

Credit evaluation broadly includes analysis of the following:



Internal risk control – Equity & Fixed income

Statutory

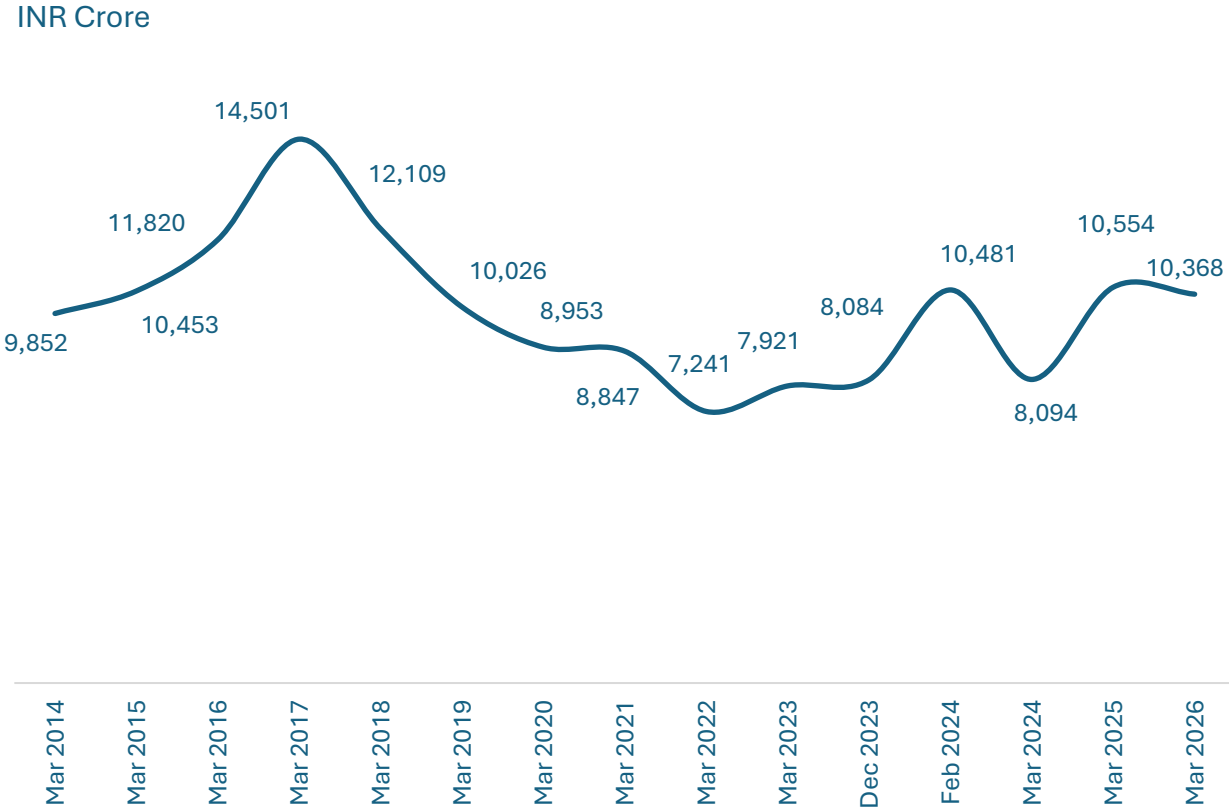
Statutory ensures compliance with all the Scheme's mandate (per company exposure/sector exposure etc.,) – this is ensured via suitable rules placed on Bloomberg

Internal

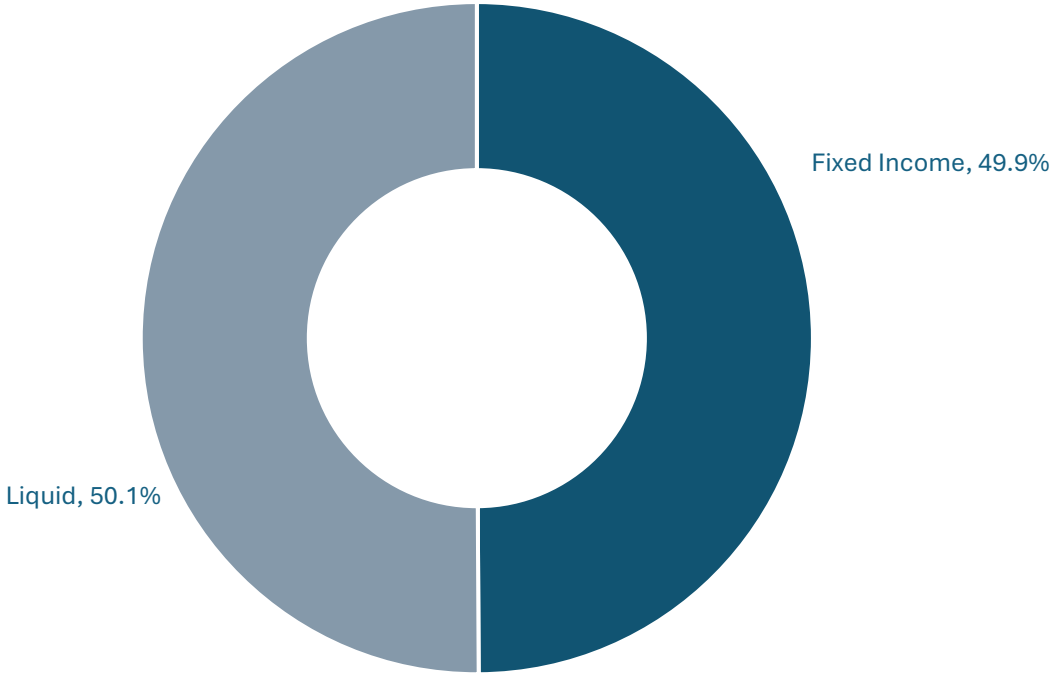
- Adherence to style – ensure no style drift (e.g. no slippage in credit quality / duration)
- Monthly reports on volatility, liquidity etc
- Ensure appropriateness of credit limits and approved credit limits are not exceeded
- Analyse the portfolio companies on various parameters (individual exposures / group exposure / yield / liquidity) to ensure overall exposure is within internally imposed limits
- Periodic reports primarily market related (through yield movements) to provide early red flags
- Analyse the liquidity profile of each Fund based on the portfolio and investor composition

Assets under management

AUM growth



AUM composition



Data Source: In-house calculations as on March 31, 2026

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OUR OFFERINGS - SUNDARAM ALTERNATES

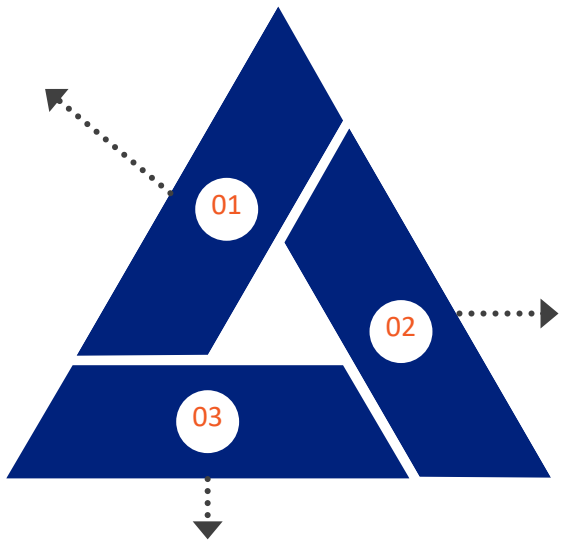
Our alternates business

SUNDARAM ALTERNATE ASSETS LIMTED

Portfolio Management Services (PMS)

Discretionary services

Dedicated manager with focused strategies to generate higher alpha



Advisory services

Advisory mandates

Alternative Investment Funds (AIF)

Category II

Close-ended funds with investment in real estate-backed, corporate, and performing credit.

Category III

Close-ended and open-ended funds with investments in listed equities. Pooling monies from global investors into Indian equities

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OUR OFFERINGS - SUNDARAM AMC, SINGAPORE

Our international business - Singapore

Our structure

Sundaram Finance Limited

Listed in India on the BSE and NSE
Regulated by the Reserve Bank of India
Vintage of 68 years

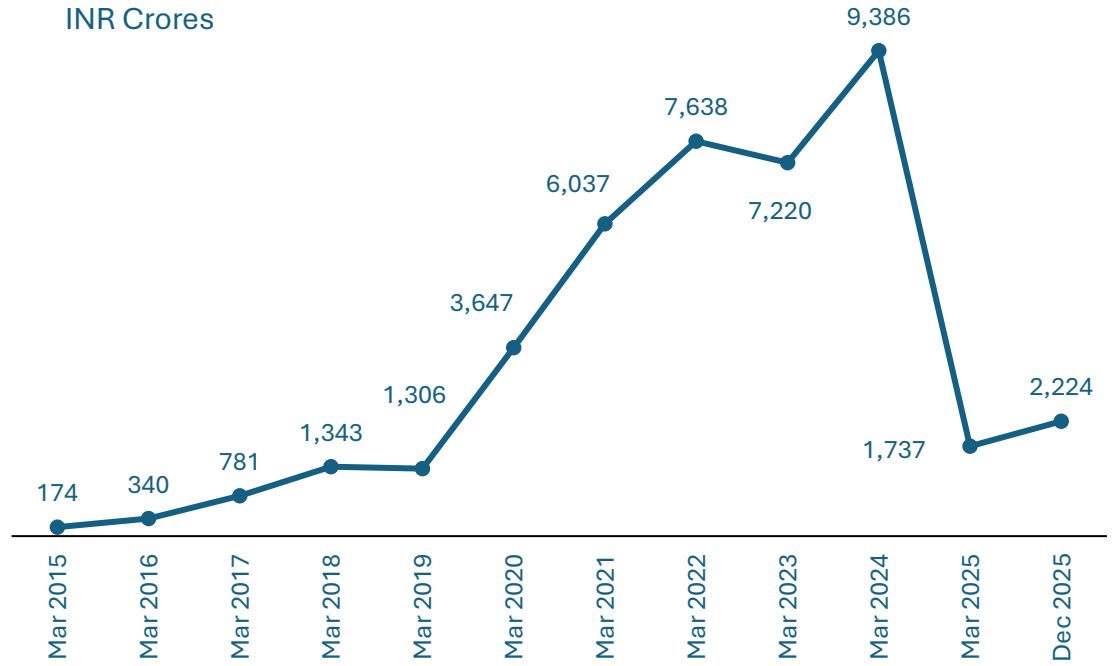
Sundaram Asset Management Company Limited

Regulated by the Securities Exchange Board of India (SEBI)
26-year track record in the Indian fund management business
Wholly owned subsidiary (100%)

Sundaram Asset Management Singapore Pte Ltd.

11-year-old MAS regulated Fund Management entity
Wholly owned subsidiary (100%)

AUM growth



Data as of March 31, 2026

Disclaimer

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Statutory: Mutual Fund: Sundaram Mutual Fund is a trust under Indian Trusts Act, 1882. Liability for sponsors is limited to Rs 1 lakh. Sponsors: Sundaram Finance Ltd. Investment Manager: Sundaram Asset Management Company Ltd. Trustee: Sundaram Trustee Company Ltd.

MUTUAL FUND INVESTMENTS ARE SUBJECT TO MARKET RISKS, READ ALL SCHEME RELATED DOCUMENTS CAREFULLY

THANK YOU

CONTACT US

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