

The aforesaid modifications shall not be construed as a change in the fundamental attributes of the respective schemes.

The following schemes will be renamed as under:

B. Changes in Asset Allocation Patterns:

Sr.	Existing Scheme Name	Existing Asset Allocation			Proposed Asset Allocation		
14	Sundaram Balanced Advantage Fund	Equity & Equity related instruments	0%	100%	Investment in Equity & Equity related instruments	0%	100%
		Fixed Income, Money Market Instruments and Government Securities Cash and Cash Equivalents	0%	100%	Investment in Debt Instruments	0%	100%
		Units issued by REITs / InvITs	0%	10%	Units of InvITs	0%	10%
15	Sundaram Equity Savings Fund	a) Asset allocation under normal circumstances:			a) Asset allocation under normal circumstances:		
		Equity & Equity related instruments (Including Derivatives)	65%	90%	Equity & Equity related instruments (Including Derivatives)	65%	90%
		• Derivatives includes Index Futures, Stock Futures, Index Options, Stock Options, etc., backed by underlying equity	15%	75%	• Derivatives includes Index Futures, Stock Futures, Index Options, Stock Options, etc., backed by underlying equity	25%	75%
		• Unhedged Equity position	15%	50%	• Unhedged Equity position	15%	40%
		Fixed Income and money market**	10%	35%	Fixed Income and money market	10%	35%
		Units issued by REITs/InvITs	0%	10%	Units issued by InvITs	0%	10%

The following schemes are reclassified as under:

D. Change in the Features of the Schemes:

2. General Changes Applicable to All Schemes

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Mutual Fund Investments are subject to market risks, read all scheme related documents carefully.