

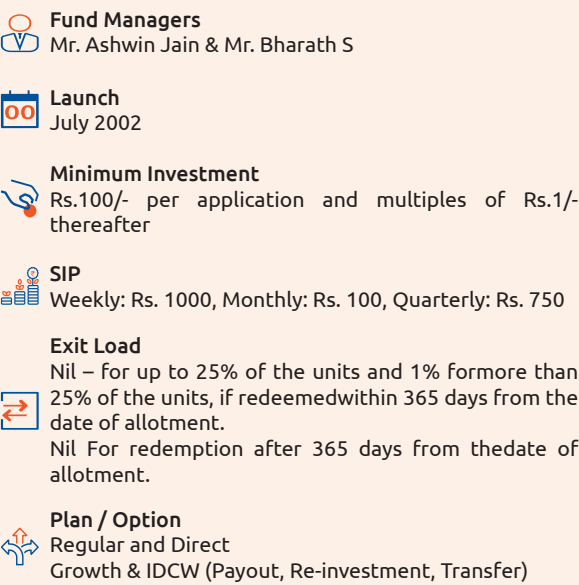
Sundaram Large Cap Fund

An open-ended equity scheme predominantly investing in large cap stocks

Fund Insights - March 2025



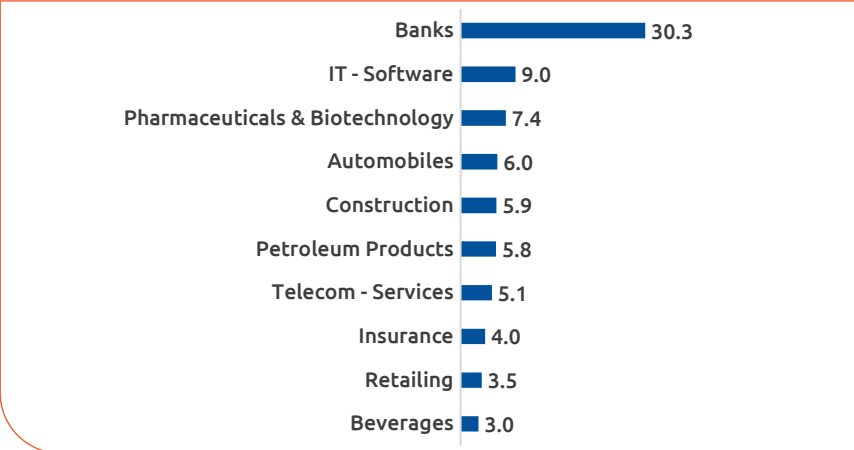
FUND FACTS & FEATURES



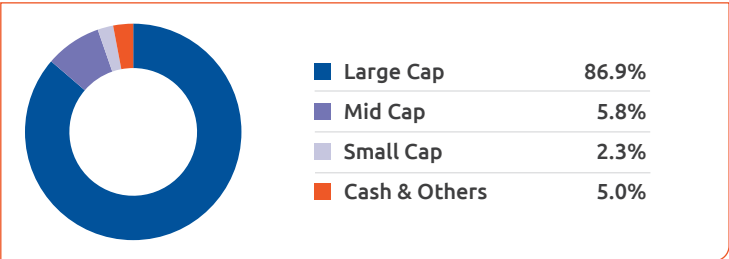
FUND MANAGER UPDATE

- The portfolio now holds 33 stocks, boosting active bets. Its overall valuation is below the peer average due to increased weighting in reasonably valued stocks.
- Large cap stocks are market leaders, less volatile, have strong balance sheets, and high liquidity, making them suitable during market volatility.
- The portfolio is a unique selection of top convictions, with an overweight position in Banks, Construction, and Pharmaceuticals, and an underweight position in Finance, FMCG, and Metals.

TOP 10 - INDUSTRY PROFILE (%)



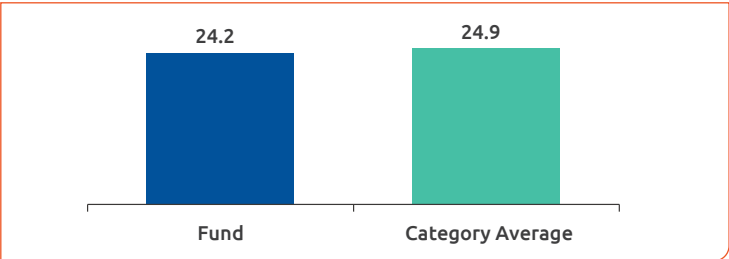
MARKET CAP (%)



PORTFOLIO CONSTRUCTION - SECTOR BETS

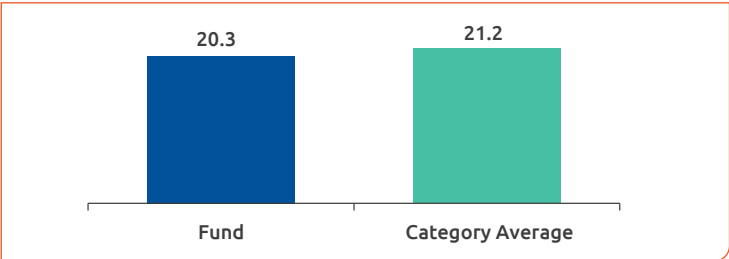
Overweights Vs Benchmark		Underweight Vs Benchmark	
Pharmaceuticals & Biotechnology	3.8	Finance	6.0
Banks	3.7	Diversified FMCG	4.5
Construction	2.7	Ferrous Metals	2.1

PRICE TO EARNINGS*



* Trailing P/E, Sourcve: Value Research as of Feb 28, 2025

HISTORICAL EARNINGS GROWTH



Source: MorningStar; Data as of Feb 28, 2025

TOP 5 STOCKS (%)	HDFC Bank	10.2%	ICICI Bank	9.7%	Larsen & Toubro	5.9%
	Reliance Industries	5.8%	Bharti Airtel	5.1%		

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SUNDARAM MUTUAL
— Sundaram Finance Group —

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WHAT'S IN - OUT

What's In	What's Out
-	Zomato Ltd

TOP 5 OVERWEIGHT STOCKS (%)

Stocks Name	Weight (%)
Dr. Reddys Laboratories Ltd	3.4
Larsen & Toubro Ltd	2.7
ICICI Lombard General Insurance Company Ltd	2.6
ICICI Bank Ltd	2.3
Sun Pharmaceutical Industries Ltd	2.0

Active positive bets are those where the fund has a higher weightage as compared to the benchmark.

PERFORMANCE

Period	Performance			₹ 10,000 invested			Value of ₹ 10,000-a-month SIP			
	Fund (%)	Benchmark Tier I (%)	Additional Benchmark (%)	Fund (₹)	Benchmark Tier I (₹)	Additional Benchmark (₹)	Investment (₹)	Fund (₹)	Benchmark Tier I (₹)	Additional Benchmark (₹)
Last 1 year	3.2	6.1	6.7	10,321	10,614	10,665	1,20,000	1,16,813	1,17,550	1,19,089
Last 3 years	11.0	12.1	11.7	13,671	14,081	13,956	3,60,000	4,23,844	4,35,400	4,32,201
Last 5 years	21.0	23.8	23.7	25,924	29,075	28,957	6,00,000	8,40,855	8,81,124	8,74,940
Since Inception	17.2	-	16.7	3,67,413	-	3,32,090	27,20,000	1,62,97,546	-	1,75,63,440

Past performance may or may not be sustained in future. Returns/investment value are as of March 31, 2025. Returns are on a compounded annual basis for period more than one year and absolute for one-year period and computed using NAV of Regular Plan-Growth Option. Value of 10,000 invested at inception is as on March 31, 2025. SIP values are in rupees.

PERFORMANCE DETAILS OF OTHER FUNDS MANAGED BY THE FUND MANAGER

Scheme Name	1 year (%)		3 years (%)		5 years (%)		Fund Managers
	Fund	Benchmark	Fund	Benchmark	Fund	Benchmark	
Performance details for schemes managed by Mr. Ashwin Jain							
Sundaram Focused Fund	4.6	6.4	11.0	13.8	22.3	26.2	Bharath S & Ashwin Jain
Sundaram Large Cap Fund	3.2	6.1	11.0	12.1	21.0	23.8	Ashwin Jain & Bharath S
Performance details for schemes managed by Mr. Bharath S							
Sundaram Mid Cap Fund	12.4	8.2	21.0	20.5	30.4	34.6	Bharath S & Ratish B Varier
Sundaram Services Fund	10.9	13.4	14.1	10.1	27.8	22.6	Rohit Seksaria & Bharath S, Patanjali Srinivasan (Overseas)
Sundaram Large and Mid Cap Fund	7.9	7.3	13.0	16.4	25.5	29.2	Bharath S & Ashish Agarwal
Sundaram Large Cap Fund	3.2	6.1	11.0	12.1	21.0	23.8	Ashwin Jain & Bharath S
Sundaram Aggressive Hybrid Fund	7.3	7.4	11.2	11.4	19.3	19.0	Bharath S & Clyton Richard Fernandes (Equity), Sandeep Agarwal & Dwijendra Srivastava (Fixed Income)
Sundaram Balanced Advantage Fund	6.4	7.9	9.8	9.5	14.1	15.4	Bharath S & Clyton Richard Fernandes (Equity) ; Dwijendra Srivastava (Fixed Income)

Data as on March 31, 2025. Source: In-house Computation. Past performance may or may not be sustained in the future. Different plans shall have a different expense structure. Returns are compounded on an annual basis for periods more than one year and absolute for one year period using the NAV of the Regular Plan – Growth Option. Returns are computed using weighted average performance using the NAV & AUM Weight of Transferor and Transferee/ Surviving Scheme for the merged funds from Principal AMC. Performance data of top 3 and bottom 3 funds (based on 5 year compounded return) managed by the fund managers are provided herein. All benchmark returns are calculated based on TRI.

RISKOMETER	Fund	Nifty 100 TRI
<p>This product is suitable for investors who are seeking*</p> <ul style="list-style-type: none"> Capital appreciation over medium to long term Investment in equity and equity-related securities of large cap companies. <p><i>*Investors should consult their financial advisers if in doubt about whether the product is suitable for them.</i></p>	<p>RISKOMETER</p> <p>The risk of the scheme is Very High</p>	<p>RISKOMETER</p> <p>The risk of the benchmark is Very High</p>

Mutual fund investments are subject to market risks, read all scheme related documents carefully.