

Application Form
Please refer to Product labelling details available on cover page and Your Guide To
Fill The Application Form (pages 23-26) before proceeding

Distributor's Sub-broker's ARN Sub-broker Code (Internal)	Chanı	nel P	artn	er / <i>I</i>	Agent	Info	orma	ation																			S	Seria	al l	No:	EQ								
Declaration for "Execution only" transaction (only where EUIN box is left blank) I We hereby confirm that the built how how is a first transaction is executed without any interaction or advice interaction or above the manager/sales person of the above distributor/sub broker or notivificationally the advice of impropriations (and any provided by the employee/relationship manager/sales person of the distributor/sub broker or notivificationally the advice of impropriations (any provided by the employee/relationship manager/sales person of the distributor/sub broker or notivificational broker											(Emplo							&																					
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To be submitted along with the application form: 1. Your FATCA-CRS Details (Foreign Account Tax Compliance Act) & KYC Additional Details (if not already submitted), and					L	h the	200	lioatic	n for	m: 1	Vou	r EA	TCA	-CP	D.						•	•	,			CVC	ا المام	litic-	201	Do	laile.	(if m	ot c	Iroca	dv a	uhm:	ttod)	and	

3. KYC details (Mandatory) (re	efer instruction 3) Individual	☐ Non-Individual (Please attach mandatory F	FATCA-CRS Annexure for Entities including UBO						
Status of First/Sole Applicant [Please (/)]	Occupation Details [Please (/)]	Gross Annual Income (in ₹) [Please (✓)]	PEP Status						
☐ Listed Company	(To be filled only if the applicant is an individual)	First Applicant	First Applicant						
☐ Unlisted Company	First Applicant ☐ Private Sector Service ☐ Public Sector Service	☐ Below 1 Lac ☐ 1-5 Lacs	For Individuals [Please (/)] Politically Exposed Person (PEP) Status (Also applicable for authorised						
□ Individual	☐ Government Service ☐ Business	☐ 5-10 Lacs ☐ 10-25 Lacs	signatories/Promoters/Karta/Trustee/Whole time Directors)						
☐ Minor through guardian	☐ Professional ☐ Agriculturist	□ > 25 Lacs - 1 Crore □ > 1 Crore (or)	☐ I am PEP						
□HUF	☐ Retired ☐ Housewife	Net-worth (Mandatory for non-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)	— IDIDIMIMIYIYIYI (Not older than one	mentioned services [Please (/)]						
☐ Company	Second Applicant	,	☐ Foreign Exchange/Money Changer Services						
☐ Body Corporate	☐ Private Sector Service ☐ Public Sector Service ☐ Government Service ☐ Business	Second Applicant	☐ Gaming/Gambling/Lottery/Casino Services ☐ Money Lending/Pawning						
☐ Trust	☐ Professional ☐ Agriculturist	☐ Below 1 Lac ☐ 1-5 Lacs	□ None of the above						
☐ Mutual Fund	☐ Retired ☐ Housewife		Second Applicant						
	☐ Student ☐ Forex Dealer	□ 5-10 Lacs □ 10-25 Lacs	(To be filled only if the applicant is an individual)						
□ FPI	☐ Others (please specify)	□ > 25 Lacs - 1 Crore	☐ I am PEP						
☐ NRI-Repatriable	Third Applicant	□ > 1 Crore (or) Net-worth	☐ I am related to PEP						
☐ NRI-Non-Repatriable	☐ Private Sector Service ☐ Public Sector Service ☐ Government Service ☐ Business	······································	Not Applicable Third Applicant						
☐ FII/Sub account of FII	☐ Professional ☐ Agriculturist	☐ Below 1 Lac ☐ 1-5 Lacs	(To be filled only if the applicant is an individual)						
☐ Fund of Funds in India	Retired Housewife	☐ 5-10 Lacs ☐ 10-25 Lacs	□ 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 Fo	or Individuals & HUF (Mandatory) N	on Individual investors should mandat	orily fill separate FATCA-CRS Annexure						
	red for all applicant(s) / guardian / PoA		only and coparate transfer one rames and						
Category	First Applicant/Guardian	Second Applicant	Third Applicant						
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	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 ☐ Business [☐ 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 agents for the purpose of ensuring appropriate 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. 5. Bank Account Details of First/Sole Applicant (as per SEBI Regulations it is mandatory) (refer instruction 5) Account No. Name of the Bank Branch **Branch Address** Bank City (redemption will be payable at this location) Account Type [Please (✓)] ☐ Savings ☐ Current ☐ NRE* ☐ NRO* ☐ FCNR* ☐ Others..... Cheque MICR No *If the payment is by DD or source of fund is not clear on the Cheque RTGS / NEFT / IFSC Code leaf, please provide a copy of FIRC. 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, Kotak Mahindra Bank, 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. Payment Details: Please issue a separate Cheque/Demand Draft favouring the scheme you wish to invest/One Time Mandate (OTM) (refer instruction 7) Scheme Name Plan □ Regular □ Direct □ Regular □ Direct □ Regular □ Direct Dividend ☐ Payout ☐ Re-Investment ☐ Sweep Dividend ☐ Payout ☐ Re-Investment ☐ Sweep Dividend ☐ Payout ☐ Re-Investment ☐ Sweep ☐ Growth ☐ Others .. ☐ Growth ☐ Others ☐ Growth ☐ Others .. Dividend Frequency: (For Fixed Income Funds only) Dividend Frequency: (For Fixed Income Funds only) Dividend Frequency: (For Fixed Income Funds only) ☐ Daily ☐ Weekly ☐ Fortnightly ☐ Monthly □ Daily □ Weekly □ Fortnightly □ Monthly □ Daily □ Weekly □ Fortnightly □ Monthly Option □ Quarterly □ Half-Yearly □ Annual ☐ Quarterly ☐ Half-Yearly ☐ Annual 🗌 Quarterly 🗌 Half-Yearly 🗎 Annual **Dividend Sweep Target Scheme (Fund) Dividend Sweep Target Scheme (Fund) Dividend Sweep Target Scheme (Fund)** (If an investor fails to specify the option, he will be allotted units under the default option/suboption of the Target scheme.) Any / each correction carried out in selecting the target scheme has to be counter-signed by the investor(s) to make it a valid selection Amount Invested (₹) DD Charges (₹) Net Amount Paid **Payment Details** OTM Cheque DD Number RTGS Fund Transfer Bank/Branch 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 DP ID Number Beneficiary Account Number ☐ Central Depository Services (India) Ltd. 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 ☐ Post-dated cheques (please provide the details below) ☐ OTM/NACH (please submit SIP Registration Form) SIP Period (For Post-Dated Cheques) **SIP Frequency** Weekly (Minimum amount ₹ 1000 Every Wednesday. Minimum No of installments 5)
 Monthly (Minimum amount ₹ 250 Minimum No of installments 20) SIP Starting SIP Ending for Monthly/Quarterly frequency only □ 1 □ 7 □ 14 □ 20 □ 25 M M Υ ☐ Quarterly (Minimum amount ₹ 750 Minimum No of installments 7) No. of First SIP Cheque No **Last SIP Cheque No PDCs Each SIP Amount** Refer Guide to investing through SIP Turn overleaf for Declaration &
∠Signature (Mandatory) → → → Serial No: EQ Sundaram Asset Management Company Limited, CIN: U93090TN1996PLC034615, Acknowledgement I & II Floor, 46 Whites Road, Chennai - 600 014. Contact No. 1860 425 7237 (India) +91 44 28310301 (NRI) 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, 23, Cathedral Garden Road, Nungambakkam, Chennal-600034. Contact No. 1860 425 7237 (India) +91 44 28310301 (NRI).

www.sundarammutual.com

Please Note: All Purchases are subject to realisation of cheques / demand drafts.

ISC's Signature & Stamp

10. Nominee (available o	only for individuals) (r	efer instruction 10)	☐ I wish to nominate the fo	llowing person(s)							
1st Nominee		2nd Nominee		3rd Nominee							
Name:				Name:							
Relationship:				Relationship:							
Address:				Address:							
Proportion (%)* in which u nominee%		rst Proportion (%)* ir nominee	n which units will be shared by first%	Proportion (%)* in which units will be shared by first nominee%							
If nominee is a minor:		If nominee is a m		If nominee is a minor:							
Date of birth:			······································	Date of birth: Name of Guardian:							
		Address of Guard	ian:	Address of Guardian:							
* Proportion (%) in which units will be shared by each nominee should aggregate to 100% □ I do not wish to choose a nominee. Signature of investor(s)											
1st / Sole Appli			2nd Applicant	3rd Applicant							
11. Declaration, Certif	ication & Signature	e (refer instructio	n 11)								
of twelve months (applicable for PAN/A Schemes of various Mutual Funds from Applicable to NRIs only: Please (/) III or from funds in my/our Non-Resident I/We hereby declare that all the particula agents, service providers, representativ intimating any changes to the above pato such information as and when provi without any obligation of advising me/. Certification: I/We have understood the correct, and complete. I/We also confir	eclaration: 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) a dicated 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 OTM/NACH • have not received nor been induced by any rebate or gifts receively 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 ₹ 50,000 in a financial year or a rolling perior twelve months (applicable for PANI/Addhaar 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 chemes of various Mutual Funds from amongst which the Scheme is being recommended to me/us. pplicable to NRIs only: Please (7) ☐ I/We confirm that I amr/We are Non-Resident to Indian Nationality/Origin and I/We hereby confirm that the funds for subscription have been remitted from abroad through normal banking channel from Imy/our Non-Resident External/Ordinary Account/FCNR Account on a ☐ Repatriation Basis ☐ Non-Repatriation Basis ☐ Non-Repatriation Basis ☐ We further declare that I/We am/are not a citizen of USA/Canada. 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, authorise yents, 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 it information as and when provided by me/us, to any Indian or foreign governmental or statutory or judicial authorities/agencies, the tax/revenue authorities										
I/We agree to indemnify Sundaram Ass respect of any other information as ma	set ivianagement Company Limite	a in respect of any faise, misie	ading, inaccurate and incomplete information reg	arding my/our "U.S. person" status for U.S. federal income tax purposes. or i							
Sundaram Mutual Fund u I/We hereby give you my/o Plan of all Schemes mana	☐ (Applicable only for investments through RIA) RIA Consent Declaration: I/We, the above-named person/s have invested in the Scheme(s) of Sundaram Mutual Fund under Direct Plan under the above mentioned Account No(s)./Folio No(s). I/We hereby give you my/our consent to share/provide the transactions data feed/portfolio holdings/NAV etc. in respect of my/our investments under Direct Plan of all Schemes managed by you, to the below mentioned Mutual Fund Distributor/SEBI-Registered Investment Advisor (Correction – Advisor): AMFI Registration Number ARN - SEBI Registration No. Name:										
Address											
City				PIN							
E-Mail ID											
Tel.No											
Consent & Signature for Aadhaar											
holding an authority to transact on behalf of such entity is not eligible to be enrolled for Aadhaar and does not submit the PAN, certified copy of an officially valid document shall be submitted.											
Name of First / Sole	Applicant / Guardian	Name	of Second Applicant	Name of Third Applicant							
≲Signature of First / So	ole Applicant / Guard	 ian <i>Æ</i> Signa	ture of Second Applicant								
Date:/			series - delangement	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	=									