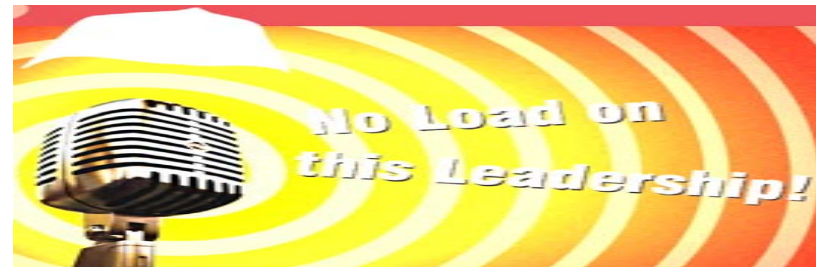


Sundaram BNP Paribas India Leadership Fund



A member of



Refer Disclaimer on slide: 11
April 2009





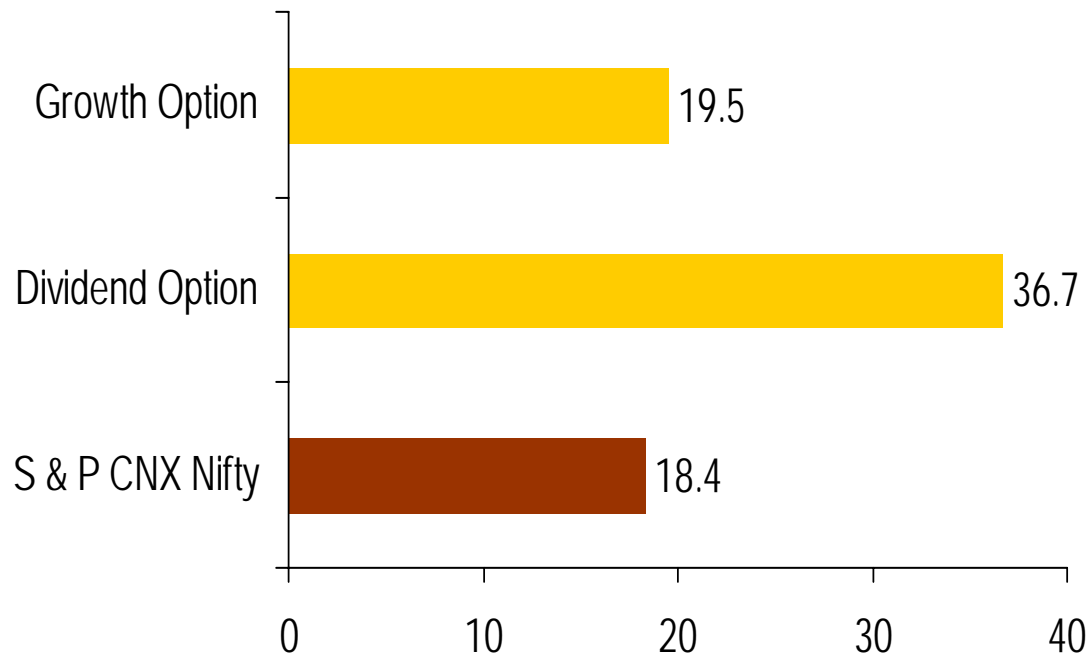
Sundaram BNP Paribas India Leadership Reasons to own the fund

- Portfolio of blue-chip companies that are the leading players in key sectors of the economy.
- Strategy: Diversified portfolio of large-cap stocks with active sector, stock and cash calls to optimize performance as compared to benchmark.
- The Growth Plan of the fund has outpaced the S&P CNX Nifty Index by 1.1 percentage points on an annual basis while the Dividend Plan has outpaced benchmark by about 18 percentage points.
- Rs.10,000 invested at launch in July 2004 in Fund is now worth Rs.23,619 in the Growth Plan and Rs.23,599 in Dividend Plan (of which Rs.15,000 as dividend and rest Rs.8,599 as prevailing value of investment).
- Dividend paid-out of 150% (Rs.15 for every unit of Rs.10) since launch in July 2004.
- No Entry Load on investment till October 14, 2009; this is not applicable for SIP & STP.
- Investments are suitable for investors with a three- to five- year horizon.
- Track record of a fund house with acclaimed record for several years in a row.

Past Performance may or may not be sustained in future

Sundaram BNP Paribas India Leadership Wealth creation

Performance chart since inception



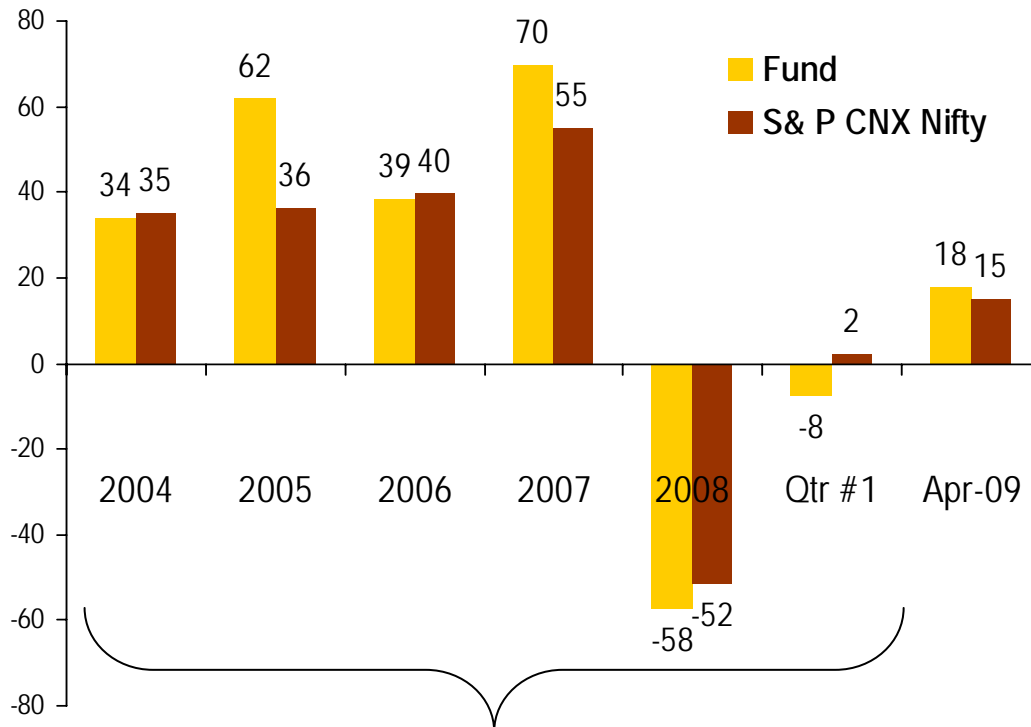
- The fund has delivered compounded annual return of close to 20% (Growth option) and 37% (Dividend option) since launch in July 2004.

- Dividend Plan returns are higher due to effect of regular payout starting from March 2005.

(Refer slide #8 for dividend history)

Returns in per cent; Annualised returns are computed using compounded annual basis Returns as on April 30, 2009
Past Performance may or may not be sustained in future

Sundaram BNP Paribas India Leadership Performance



Portfolio was multi-cap in nature with a sizeable allocation to mid- & small-cap stocks; this boosted returns in 2005 & 2007, but hurt performance in 2008 and early 2009. Restructuring process has been completed only by end March.

Re-positioning

✓ April represents the first month of the portfolio being in line with the product positioning.

✓ Product positioning has been restored to seek growth through blue chip names and provide resilience during tough times.

✓ Style integrity will ensure adherence to the positioning, going forward.

Qtr #1: Quarter ended March 31, 2009
Returns in % Performance as on April 30, 2009
Past Performance may or may not be sustained in future

Sundaram BNP Paribas India Leadership **Product Positioning**

- **Positioning:** Active large-cap fund (Wealth creation through blue chips)
- **Approach:** Generate capital appreciation by taking active sector, stock and cash calls but avoiding concentrated holding in any sector.
- **Style:** Own the leader by revenue in the key sectors to build a portfolio of blue-chip names at all times and take calls in a manner that the portfolio outpaces benchmark comfortably in bullish phases and provides resilience through contained damage during bearish phases.
- **Cap-curve:** At least 90% on an average will be invested in large-cap stocks and the rest will be invested in mid-cap stocks.
- Mid-cap limits to be used only if required.
- **Definition:** Large-cap stocks shall include those with the market cap of up to the 100th stock by market cap on the NSE.

Sundaram BNP Paribas India Leadership Latest portfolio

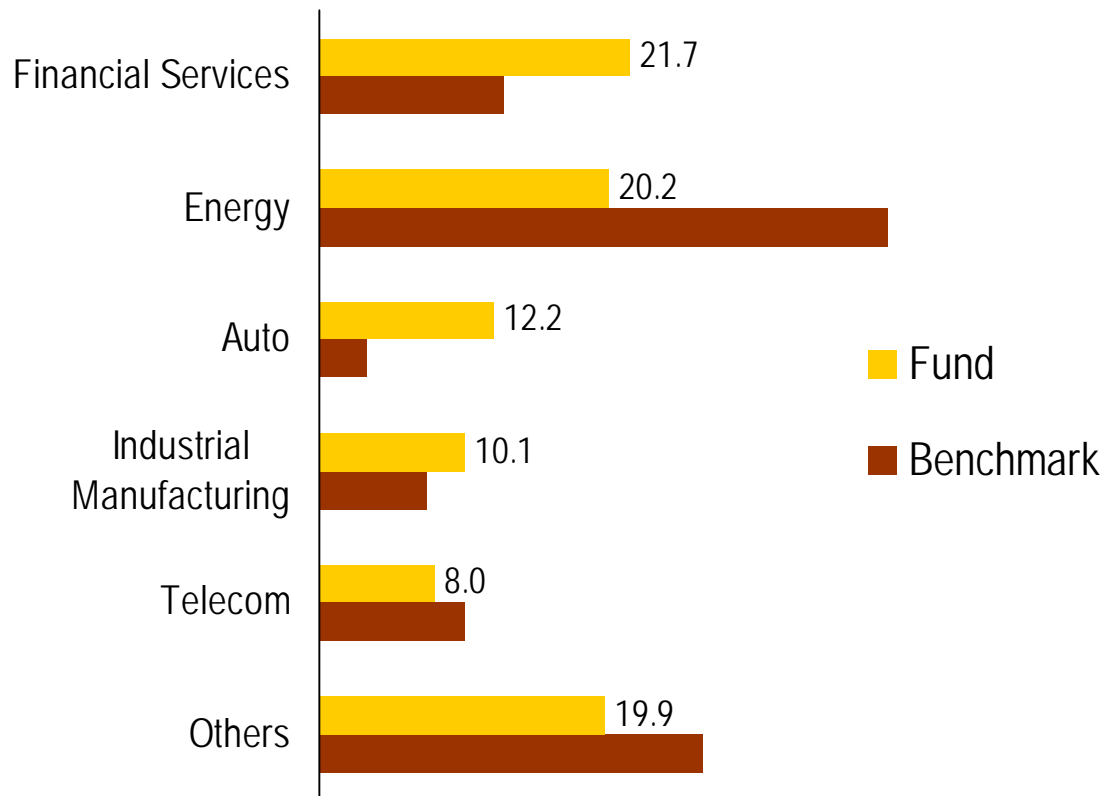
Company	Allocation
Reliance Industries	9.4
ICICI Bank	8.6
State Bank Of India	6.2
Bharti Airtel	5.4
Reliance Infrastructure	4.7
Hero Honda	3.8
Hindustan Unilever	3.8
T C S	3.8
Infosys	3.6
Tata Power	3.6
Larsen & Toubro	3.5
O N G C	3.5

Company	Allocation
Tata Motors	3.4
ITC	3.4
H D F C	2.8
Maruti	2.6
Reliance Communications	2.6
Mahindra & Mahindra	2.3
N T P C	2.3
HDFC Bank	2.2
Punjab National Bank	1.9
A B B	1.8
GlaxoSmithKline Pharma	1.8
Jaiprakash Associates	1.7

Company	Allocation
Cairn India	1.4
Ranbaxy	1.3
Tata Steel	0.5
Equity	92.1
Derivatives	3.2
Debt	-
Cash & Equivalents	4.8
AUM (Rs. Crore)	125

Data Source: Fact Sheet

Sundaram BNP Paribas India Leadership Preferred sectors & Stock bets



Main Active Positions	
Overweight	Underweight
ICICI Bank	ONGC
Reliance Infrastructure	NTPC
Tata Motors	BHEL
Hero Honda	Reliance Industries
Tata Power	Reliance Petroleum

Position status is relative to benchmark

Sector allocation indicated in percentage points in comparison to benchmark

As on April 30, 2009; Source: Fact Sheet

Sundaram BNP Paribas India Leadership

Value of early investment & dividend history

Dividend history

%	Rs. Per Unit	Record Date	Record Date NAV
25.0	2.50	29-03-05	13.44
22.5	2.25	07-10-05	15.84
17.5	1.75	24-02-06	17.07
30.0	3.00	09-06-06	13.87
55.0	5.50	23-11-07	21.30

Total dividend pay-out : Rs 15 per unit

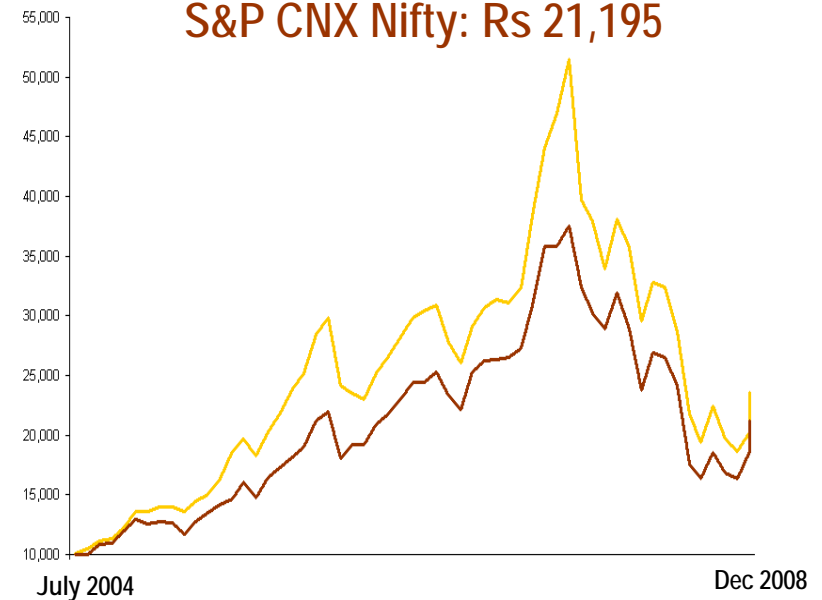
If you had invested Rs.10,000 at the time of launch you would have received Rs.15,000 as dividend and your holding still be worth Rs.8,599

All dividends are on the face value of Rs.10 per unit. After declaration of dividend the NAV will decline to the extent of the payout

Value of Rs 10,000 invested

India Leadership: Rs 23,619

S&P CNX Nifty: Rs 21,195



Value as on April 30, 2009; Data Source: Bloomberg; Analysis: In House
Past Performance may or may not be sustained in future

Sundaram BNP Paribas India Leadership **Portfolio manager**



J Venkatesan has been with Sundaram BNP Paribas Asset Management as fund manager for more than two-and-half years now. Though the latest to join the equity team, he has more than two decades experience in tracking financial markets in India. He manages the following Sundaram BNP Paribas Funds: Growth, India Leadership, Rural India and Financial Services Opportunities.

He is a Cost Accountant and a Post-Graduate in Commerce. A seven-year stint at Canara Bank was followed by a shift to the asset management industry through Canbank Mutual Fund (now Canara Robeco). With a rich experience of close to ten years in fund management, he joined Sundaram BNP Paribas Asset Management in January 2006.

Sundaram BNP Paribas India Leadership Fund facts

Allotment Date	July 2004	
NAV (30 April 2009)	Growth: Rs 23.6189	Dividend: Rs 8.5991
Plans / Options	Regular & Institutional / Growth, Dividend Payout & Re-investment	
Minimum Subscription Amount		
Regular Plan	First Investment: Rs 5000	Subsequent Purchase: Rs 500
Institutional Plan	First Investment: Rs 5 crore	Subsequent Purchase: Rs 1 Lakh
SIP	Rs 250 per month	Rs 750 per quarter
Asset allocation		
Equity Instruments of leaders: At least 65%; Equity Instruments of others including investments in conglomerates & potential leaders (including ADRs and GDRs): Not exceeding 35%; Equity futures & options: Not exceeding 25%; Money market instruments : Not exceeding 25%		
Objective		
Seek capital appreciation by investing in select stocks of companies which meet the criteria of 'Leaders' in their respective sectors/sub sectors.		
Entry Load (Regular Plan)		
Entry Load	Nil (applicable up to October 14, 2009)	
SIP Entry Load	2.25% per transaction	
Exit Load (Regular Plan)		
Investment Amount: < Rs 2 crore	Redeemed within 12 months: 1 %	Redeemed after 12 months: NIL
Investment Amount: = > Rs 2 crore	Redeemed within 6 months: 1 %	Redeemed after 6 months: NIL

Source: Fact Sheet

Sundaram BNP Paribas India Leadership Disclaimer

Past performance may or may not be sustained in future.

Mutual Fund Investments are subject to market risks. Please read the offer document carefully before investing. Copy of the offer document, key information memorandum and application form may also be obtained from the offices / investor service centres of Sundaram BNP Paribas Asset Management, its distributors and online at www.sundarambnpparibas.in

Fund Facts: *Fund Type:* Open-end Equity Scheme. *Investment Objective:* Seek capital appreciation by investing in select stocks of companies which meet the criteria of 'Leaders' in their respective sectors/subsectors *Plan:* Regular & institutional; *Options:* Dividend Payout, Dividend Reinvestment & Growth; Load Structure for One-time investment in Regular Plan - Entry Load: Nil; Applicable up to October 14, 2009. Load Structure for SIP in Regular Plan-Entry load is 2.25% for investments less than Rs.2 crore and nil for amount equal to or in excess of Rs.2 crore. Exit load for all investments of less than Rs.2 crore is 1% for redemption within 12 months from date of allotment. Exit load for all investments of equal to more than Rs.2 crore is 1% for redemption within 6 months from date of allotment. and nil if redeemed after 6 months. For all investments there is no exit load for redemption after 12 months from date of allotment. The minimum amount is Rs.5,000 for Regular Plan and for subsequent investments, Rs.500 & multiples of Rs. 1. *Institutional Plan:* The plan is open only to specific category of institutional investors mentioned in the Scheme Information Document. The minimum first-time investment is Rs.5 crore and subsequently Rs.1 lakh and in multiples of Rs 1. There is no entry load or exit load. There will be no entry load for direct applications received by the asset management company (refer www.sundarambnpparibas.in for details) Units would be available for sale on all working days and redemption at the applicable NAV subject to prevailing loads. There will be no entry or exit load on bonus units and units allotted on re-investment of dividend. *Asset Allocation:* Equity Instruments of leaders: At least 65%; Equity Instruments of others including investments in conglomerates & potential leaders (including ADRs and GDRs): Not exceeding 35%; Equity futures & options: Not exceeding 25%; Money market instruments: Not exceeding 25%

General Risk Factors: All mutual funds and securities investment are subject to market risks. There is no assurance or guarantee that objectives of the scheme will be achieved. Past performance of Sponsor/Asset Management Company/Fund does not indicate future performance. Investors in the scheme are not being offered any guaranteed or indicated returns. Sundaram BNP Paribas Tax Saver is only the name of the Scheme and does not in any manner indicate either the quality of the scheme or its future prospects and returns. NAV may rise or decline depending on market conditions. Main types of risks are market risk, liquidity risk, credit risk and systemic risks. If and to the extent, the portfolio includes overseas stocks, investors will be exposed to country risk, currency risk, geo-political risk, legal restrictions and regulation changes in geography other than India. There is risk of capital loss. Changes in government policy and tax benefits applicable to mutual funds may impact returns to investors. There is risk of capital loss.

Scheme-specific risk factors: Aspects that affect financial markets could have a bearing on the performance of the fund.

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Statutory details: Sundaram BNP Paribas Mutual Fund has been set up as a trust under the Indian Trusts Act, 1882 Sponsors (Liability limited to Rs 1 lakh): Sundaram Finance Limited & BNP Paribas Asset Management. Investment Manager: Sundaram BNP Paribas Asset Management Company Limited. Trustee: Sundaram BNP Paribas Trustee Company Limited.

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**Thank
You**