

Sundaram Emerging Leadership Fund (SELF) Portfolio

KEY PORTFOLIO ATTRIBUTES

ABOUT SUNDARAM ALTERNATE ASSETS

Sundaram Alternate Assets Ltd. (SA) is a wholly-owned subsidiary of Sundaram Asset Management Company Limited (SAMC), that caters to investment needs of high net-worth individuals (HNIs). SAMC is a wholly-owned subsidiary of Sundaram Finance Limited, a leading non-banking finance company in India. Sundaram Portfolio Managers (SPM) and Sundaram Alternative Investment Funds (AIFs) are the divisions under the SA umbrella. Built on a foundation of trust, Sundaram Alternates tailors solutions to help

KEY PEOPLE



(https://www.pmsaifworld.com/team_mf/sunil-singhania/)

Mr. Madanagopal Ramu
Fund Manager

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Investment Objective

The objective of Sundaram Emerging Leadership Fund (SELF) Portfolio is to seek long term capital appreciation with investment in mid and small-cap companies.

It is a multi-sector portfolio with a mix of compounders & cyclicals. It is ideal for long-term investors seeking returns through investments predominantly in small and midcap stocks and are comfortable with short-term volatility.

Strategy Highlights

Sundaram Emerging Leadership Fund (SELF) Portfolio Highlights:

- Long track record of performance: 12+ years | 3 market cycles
- Focus on consistent alpha generation
- Concentrated bet on small number of good mid and small cap businesses
- Leverage Mid & Small cap strength
- 3Q approach: Disciplined stock selection process
- Identify long term trends and invest early in them
- Bet on management committed to growth
- Wealth Multiplier Effect: AUM multiplied ~6.6x since inception [as of Feb 2023]

Investment Philosophy

Sundaram Emerging Leadership Fund (SELF) Portfolio follows the below mentioned Key Attributes:

- Emerging leaders – focus on Mid / Small cap companies which are growing faster than the industry. Bet on Sundaram's strength in the mid & small cap space; a differentiated yet concentrated portfolio positioned attractively along the cap curve.
- Asset light / High ROCE businesses
- Excellent Cash conversion from operations
- Multi-sector portfolio
- Stocks with market cap less than Rs. 500 billion.

"EASE" portfolio

- Emerging leaders – clean and high quality promoters / management
- Asset light & High ROCE businesses are preferred
- Scalable companies: mid cap to large cap, small cap to mid cap transitioning companies
- Excellent cash conversion from operations.
- Identify stocks that are in early stages of their business cycle and could emerge as tomorrow's large caps.

India 2025 – Themes

- Financial inclusiveness
- Phygital Bluechips

- Consumption Czars
- Export Voyagers

Investment Strategy

Sundaram Emerging Leadership Fund (SELF) follows the 3Q Quality Approach to Stock Selection:

Quality of Business

- Scalability: How big is the opportunity?
- Self Sustaining business models: 3Q Financial framework
- Strong differentiating factors in business: What is the key competitive advantage to sustain the growth over long term?, and is it cost competitive, a superior brand leading to higher pricing power or pure execution?

Quality of Financials

- Ability to double earnings in 4-5 years
- $\text{Growth} = \text{Reinvested Cash} \times \text{RoIC}$
- Biz. with min RoIC of 15%
- Higher cash generation to lead to higher reinvestment
- Debt to Equity should be $<0.5x$ as low debt helps businesses navigate tough times

Quality of Management

- Past execution track record
- Vision of management
- Focus on high sustainable growth
- Past record of identifying and investing in profitable opportunities
- Good corporate governance track record
- Visionary
- Problem solving

Sundaram Alternates' Niche

- Strong Track Record
- Low Churn
- Time Tested Stock Selection
- Reach Across Country
- Transparency



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(SISOP PMS)

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Sundaram Alternates'
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Opportunities Fund (ECCO)
– 1 | CAT II AIF

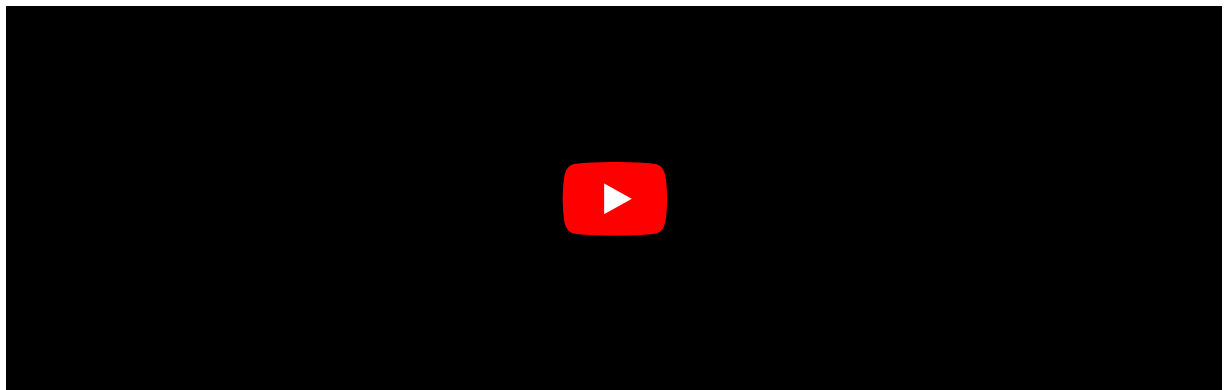
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