

# OWN THE GLOBAL BRANDS THAT ARE TRYING TO SELL TO YOU!

Introducing

**Sundaram**

## World Brand Fund

Series III – A 5-year closed-end equity scheme\*

**NEW FUND OFFER** Dec 2 to Dec 16, 2014 | ₹10/- per unit



# GLOBAL BRANDS



Global Brands have bought the India story. They are here in a big way. Be it your mobile phone, your sports shoes, automobile, jeans or software, you seem to be buying world brands all the time, as is the rest of the world. Won't it be smart to invest in such brands? Won't it be really nice to put a little money in your pocket each time you or someone else in the world buys a global brand? That's the logic behind Sundaram World Brand Fund. Clever isn't it?

### Strong Brands

- Span borders
- Span categories
- Sustain pricing power across economic cycles
- Build a competitive moat
- Generate durable cash flows and high returns on capital

### Robustness demonstrated through back-testing

In the last 12 years, a model portfolio of the top 30 Global Brands held for 5-year periods has delivered a positive return 98% of the time.

Data as of 30 Sep 2014. Annualized Returns are computed on CAGR basis. Source: Bloomberg and in house analysis. INR/USD conversion rates: Bloomberg. WBF Model Portfolio inception - 1 Oct 2002. Past Performance may or may not indicate future performance.

### 2009 Model Portfolio

American Express	Hewlett-Packard(HP)	Nokia
Apple	Honda Motor	Oracle
BMW	HSBC	Pepsi
Cisco Systems	Intel	Philip Morris International (Marlboro)
Citigroup	IBM	Procter & Gamble (P&G)
Coca-Cola	LVMH (Louis Vuitton)	Samsung Electronics
Daimler (Benz)	McDonald's	Sony
General Electric	Microsoft	Toyota Motor
Google	Nestle	United Parcel Service (UPS)
Hennes & Mauritz(H&M)	Nike	Walt Disney

The above list is only for illustrative purposes and the portfolio of the scheme may not replicate the same.

Distributor's Address:



**SUNDARAM MUTUAL**  
UNEARTHING OPPORTUNITIES

# Sundaram World Brand Fund

Clever isn't it?

## Global Brands deliver high Return on Equity (RoE) and Stock Markets appreciate this!

Strong competitive positioning leads to exceptional returns for shareholders

	Sales (USD Billion)			Net Income (USD Billion)			RoE (%)	Market Cap (USD Billion)		
	2008	2013	Growth (%)	2008	2013	Growth (%)	2013	2008	2013	Growth (%)
<b>Coca-Cola</b>	31.9	46.9	46.7	5.8	8.6	47.8	26.7	104.7	182.4	74.2
<b>Google</b>	21.8	59.8	174.5	4.2	12.3	205.7	15.2	96.9	374.4	286.5
<b>Apple</b>	37.5	170.9	355.9	6.1	37	505.3	30.6	75.9	504.8	565.3
<b>American Express</b>	31.9	34.9	9.4	2.7	5.4	98.6	27.9	21.5	97.2	351.7
<b>UPS</b>	51.5	55.4	7.7	3	4.4	45.6	77.4	54.9	97.6	77.7
<b>Nike</b>	18.6	25.3	35.9	1.9	2.5	31.3	22.5	24.8	69.9	182.7

All data as of 30 Sept 2014. Based on absolute returns. Source: Bloomberg and in-house analysis. INR/USD conversion rates: Bloomberg. WBF Model Portfolio inception: 1 Oct 2002. Past performance may or may not indicate future performance.

## World Brand Fund - Model Portfolio Performance

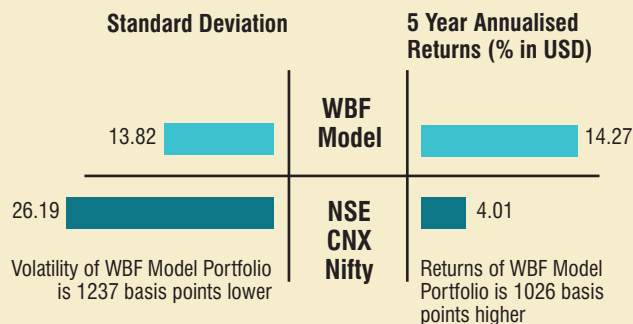
Our back-testing results showed that the actively-run model portfolio performed better than scheme benchmark and Nifty in the medium term.

	WBF Annualised Returns % in USD*	MSCI ACWI (Benchmark)	WBF Annualised Returns % in INR*	NSE CNX NIFTY Index
2014 YTD	3.3	2.0	N/A	N/A
1-Year	13.5	9.1	12.0	38.6
2-Years	14.9	12.0	24.1	17.8
3-Years	18.8	14.0	28.2	17.0
4-Years	14.1	8.0	23.8	7.4
5-Years	14.1	7.7	19.9	9.3
6-Years	11.4	5.9	16.5	12.5
7-Years	6.6	0.2	13.4	6.7

\* Return difference due to USD/INR conversion rates

All data as of 30 Sept 2014. Annualized Returns are computed on CAGR basis. Source: Bloomberg and in-house analysis. INR/USD conversion rates: Bloomberg. WBF Model Portfolio inception - 1 Oct 2002. Past performance may or may not indicate future performance.

## A good addition to your India exposure



All data as of 30 Sept 2014. Annualized Returns are computed on CAGR basis. Source: Bloomberg and in-house analysis. INR/USD conversion rates: Bloomberg. WBF Model Portfolio Inception - 1 Oct 2002. Past performance may or may not indicate future performance.

Several of the leading brands are already in India, and growing strongly

- Google revenue from India crossed ₹3,000 crore for the year ending March 2014, up 47% from the year before. Targeting ₹6,000 crore for March 2015.
- McDonald's entered India in 1996, and now has over 310 outlets.
- iPhone sales in India up 55% last year, and iPad sales up by 45% year on year.
- Honda India sold 1,34,339 cars last year, representing a staggering 82% growth.
- Amazon, after launching operations in India in June 2014, has announced plans to invest an additional USD 2 billion (₹12,000 crore), and sees India on track to become the fastest country ever to reach \$1 billion (₹6,000 crore) in gross sales.

Source: Bloomberg and in-house analysis.

Talk to your investment advisor or Call: 1800-103-7237  
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**SUNDARAM MUTUAL**  
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This product is suitable for investors who are seeking\*\* ● long term capital growth ● Investment predominantly in equity & equity related Instruments listed on recognized overseas stock exchanges across the world ● High Risk (BROWN)

\*The scheme does not qualify as an equity-oriented scheme from the perspective of prevailing Indian Income Tax laws.  
\*\*Investors should consult their financial advisors if in doubt about whether the product is suitable for them.

Note: Risk may be represented as:

● (BLUE) investors understand that their principal will be at low risk  
● (YELLOW) investors understand that their principal will be at medium risk  
● (BROWN) investors understand that their principal will be at high risk

Copies of the SAI, SID and application form with KIM can be obtained from the offices / Investor Service Centres of Sundaram Mutual or its authorized distributors or downloaded from [www.sundarammutual.com](http://www.sundarammutual.com). Past performance may or may not be sustained in future and does not necessary serve as a basis for future investments. General Risk Factors: There can be no assurance or guarantee that fund's objectives will be achieved. NAV may go up or down, depending on the factors and forces affecting the securities market. Main types are market risk, liquidity risk, credit risk, risk arising out of overseas investments, and systemic risks. At times, liquidity of investments may be impaired. There is uncertainty of dividend distribution and risk of capital loss. Investors in the schemes are not being offered any guaranteed or indicated returns. Sundaram World Brand Fund Series III is only the name of the scheme and does not in any manner indicate either quality or future prospects and returns. Fund Facts: Minimum Investment amount - Rs 5,000/- & in multiples of Rs 10 thereafter. Fund Manager: S. Bharath & Dwijendra Srivastava; Benchmark: MSCI ACWI Index. Plans: Regular & Direct. Options: Growth & Dividend Payout. Load: Entry Load - Nil; Exit Load - Not Applicable. General Disclaimer: This document is issued by Sundaram Asset Management, an Investment Manager registered with the Securities and Exchange Board of India in India and is produced for information purposes only. It is not a prospectus or Offer Document or Scheme Information Document or an offer or solicitation to buy any securities or other investment. Information and opinion contained in this document are published for the assistance of the recipient only; they are not to be relied upon as authoritative or taken as a substitution for exercise of judgment by any recipient. They are subject to change without any notice and not intended to provide the sole basis of any evaluation of the instrument discussed or offer to buy. It is neither a solicitation to sell nor shall it form the basis of or be relied upon in connection with any contract or commitment whatsoever or be taken as investment advice. The information and opinions contained in this communication have been obtained from sources that Sundaram Asset Management believes to be reliable; no representation or warranty, express or implied, is made that such information is accurate or complete and it should not be relied upon as such. Sundaram Asset Management neither guarantees its accuracy and/or completeness nor does it guarantee to update the information from time to time. By accepting this document you agree to be bound by the foregoing limitations. This communication is for general information only without regard to specific objectives, financial situations and needs of any particular person who may receive it and Sundaram Asset Management is not soliciting any action based on this document. Sundaram Asset Management in the discharge of its functions, may use any of the data presented in this document for its decision-making purpose and is not bound to disclose the same. For scheme specific risk factors, asset allocation, load structure, fund facts and taxation aspects please refer the Statement of Additional Information and Scheme Information Document available online and at branches/Investor Service Centres. Statutory: Mutual Fund: Sundaram Mutual Fund is a trust under Indian Trusts Act, 1882 Liability for sponsor is limited to Rs.1 lakh. Sponsor: Sundaram Finance Ltd. Investment Manager: Sundaram Asset Management Company Ltd. Trustee: Sundaram Trustee Company Ltd.

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