

To outperform
you need **Select Focus**



Sundaram BNP Paribas Select Focus

- An open end equity scheme

A Dynamically Managed Large-Cap Fund

A member of



Refer Disclaimer on slide: 39, 40 & 41

June 2010



Mutual Fund Investments are subject to market risks. Please read the Statement of Additional Information (SAI) and Scheme Information Document (SID) carefully before investing. *Copy of the SAI, SID, 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 at www.sundarambnpparibas.in*

All mutual funds and securities investments are subject to market risks, and 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 and systemic risks. At times, liquidity of investments may be impaired. There is uncertainty of dividend distribution and risk of capital loss. Past performance of the Sponsor/Asset Management Company/Fund does not indicate the future performance. Investors in the schemes are not being offered any guaranteed or indicated returns.

Sundaram BNP Paribas Select Focus is only the name of the scheme and does not in any manner indicate either quality or future prospects and returns.

For detailed disclosures on risk factors and disclaimers refer slide 39, 40 & 41



Select Focus Reasons to own Select Focus

- Portfolio of blue-chips with high liquidity & S & P CNX Nifty as benchmark
- A high alpha product in the large-cap space indicating the quality of stock picking
- Optimum vehicle to play the expanding large-cap universe and emerging mega-cap stocks
- Aggressive style that focuses on few themes & less than 30 stocks that has led to an impressive track record
- Consistently proven ability to zero in on value enhancing themes

Past Performance may or may not be sustained in future

Source: Latest Fact Sheet

Reasons to own Select Focus

- Annual returns of 31.0 per cent over more than seven years since launch outpaces Nifty by 6.9 percentage points
- An investment of Rs 100 in July 2002 is now worth Rs 848; Rs 1000-a-month SIP since launch is worth Rs 2.69 lakh
- A fund that must be considered as a core part for any equity portfolio
- The fund has an asset base (Rs 1148 crore as of June 30, 2010) that is scalable without impacting performance
- Srividhya Rajesh has been managing this fund since launch, ensuring stability and consistency in fund management style

Past Performance may or may not be sustained in future

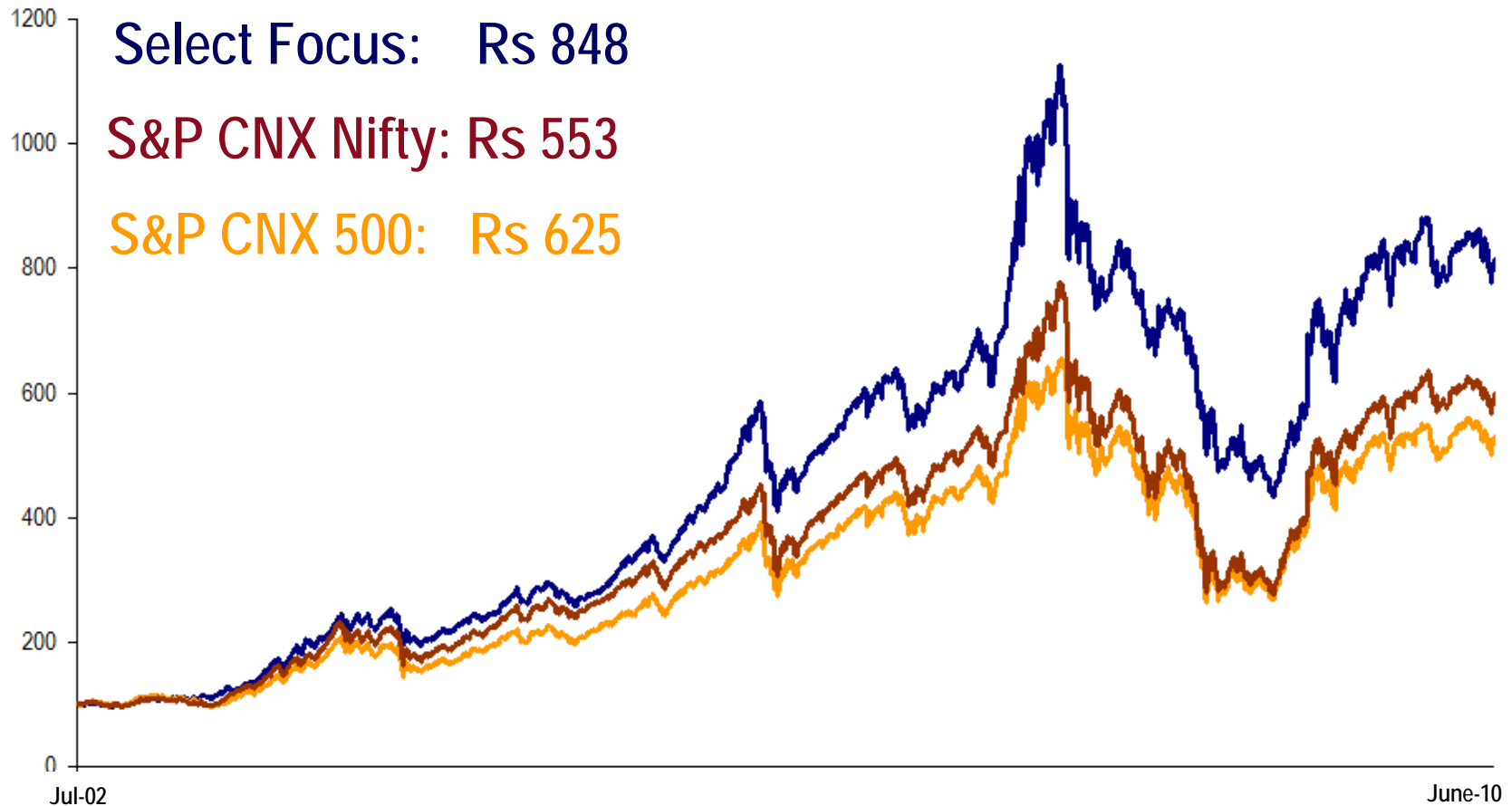
Source: Fact Sheet as on June 30, 2010

- **Positioning:** Concentrated large-cap fund
- **Approach:** Generate capital appreciation by taking active sector, stock and cash calls.
- **Style:** Own a concentrated portfolio with emphasis on two/three themes accounting for 50%-70% and a maximum of 30 stocks. The portfolio will aim to generate sizeable outperformance.
- **Benchmark:** S & P CNX Nifty
- **Cap-curve:** At least 85% on an average will be invested in large-cap stocks and the rest may be invested in mid-cap stocks.
- **Mid-cap limits** to be used only if required.

Performance

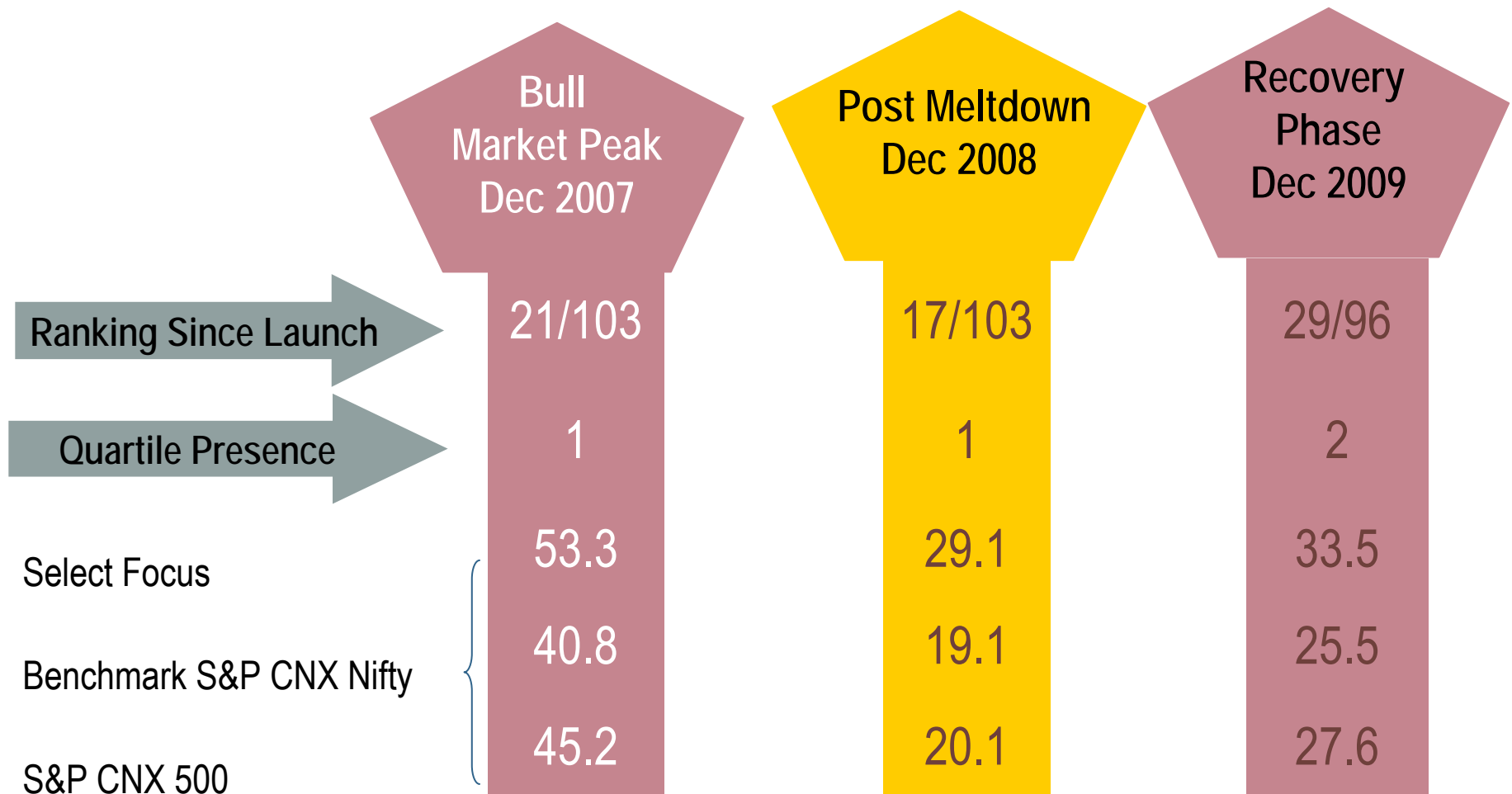
Select Focus Value of early investment

Value of Rs100 invested in July 2002



Past Performance may or may not be sustained in future
Investment and Value in Rs as on June 30, 2010

Performance since launch at different stages of the market



Annualized Returns since launch is in percentage computed on compounded annual basis.
 Ranking as of December 31, 2007, December 31, 2008 & December 31, 2009. Data Source: NAV India; Analysis: In-house

Please refer disclaimer in slide 41, 42, 43 & 44
 Past Performance may or may not be sustained in future

Select Focus

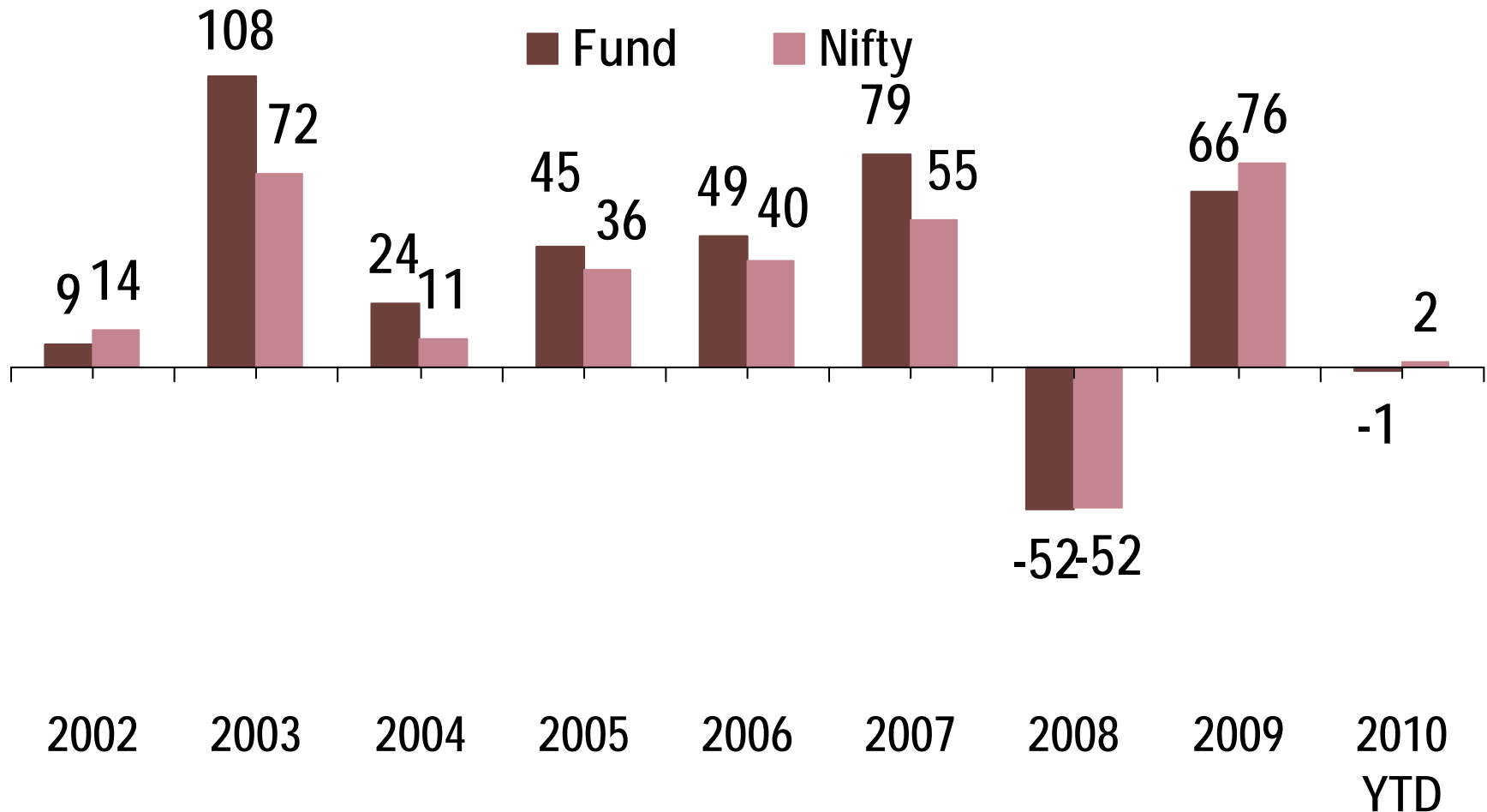
Attractive, Nifty-leading returns

Period	Change in NAV %		Annual Return (%)		
	Fund	Benchmark	Fund	Benchmark	Excess
Since Inception	748.2	453.0	31.0	24.1	6.9
Last 7 years	557.5	368.4	30.8	24.7	6.2
Last 5 years	193.7	139.2	24.0	19.0	5.0
Last 3 years	32.1	23.0	9.7	7.1	2.6
Last 2 years	23.0	31.5	10.9	14.7	-3.8
Last 1 year	24.9	23.8	24.9	23.8	1.1

Past Performance may or may not be sustained in future

Returns in per cent; Computed using NAVs of Growth Option on compounded annual basis. Returns as on June 30, 2010

Select Focus Consistent outperformer



Past Performance may or may not be sustained in future
Returns in per cent; Returns as on June 30,2010

Select Focus SIP Performance

	Investment Rs	Fund Rs	Benchmark Rs	Fund Returns (%)
Lifetime	95,000	2,68,982	2,18,481	25.5
Last 7 years	84,000	1,81,491	1,60,399	21.6
Last 5 years	60,000	87,378	84,912	15.0
Last 3 years	36,000	43,212	44,538	12.3
Last 1 year	12,000	12,791	12,995	12.6

Past Performance may or may not be sustained in future
Investment and Value in Rs as on June 30,2010

Select Focus Performance Analysis

Parameter	Fund	Benchmark
Average Annual Mean	31.47	25.81
Standard Deviation	29.27	28.25
Beta	0.97	1.00
Sharpe Ratio	0.81	0.64
Sortino Ratio	1.21	0.86
Treynor Ratio	24.68	18.16

Benchmark: S&P CNX Nifty Index

Risk-Return Metrics are based on month end NAVs since launch and have been annualised.

The risk free rate considered for analysis is 7.651% per annum (10 year T-Bill)

Past Performance may or may not be sustained in future

Data source : Bloomberg; Computation: In-house ; As on June 30, 2010

Parameter	Fund
Alpha	6.29
Correlation	0.93
Tracking Error	10.67
Information Ratio	0.53
Turnover	288%

Risk-Return Metrics are based on month end NAVs since launch and have been annualised.

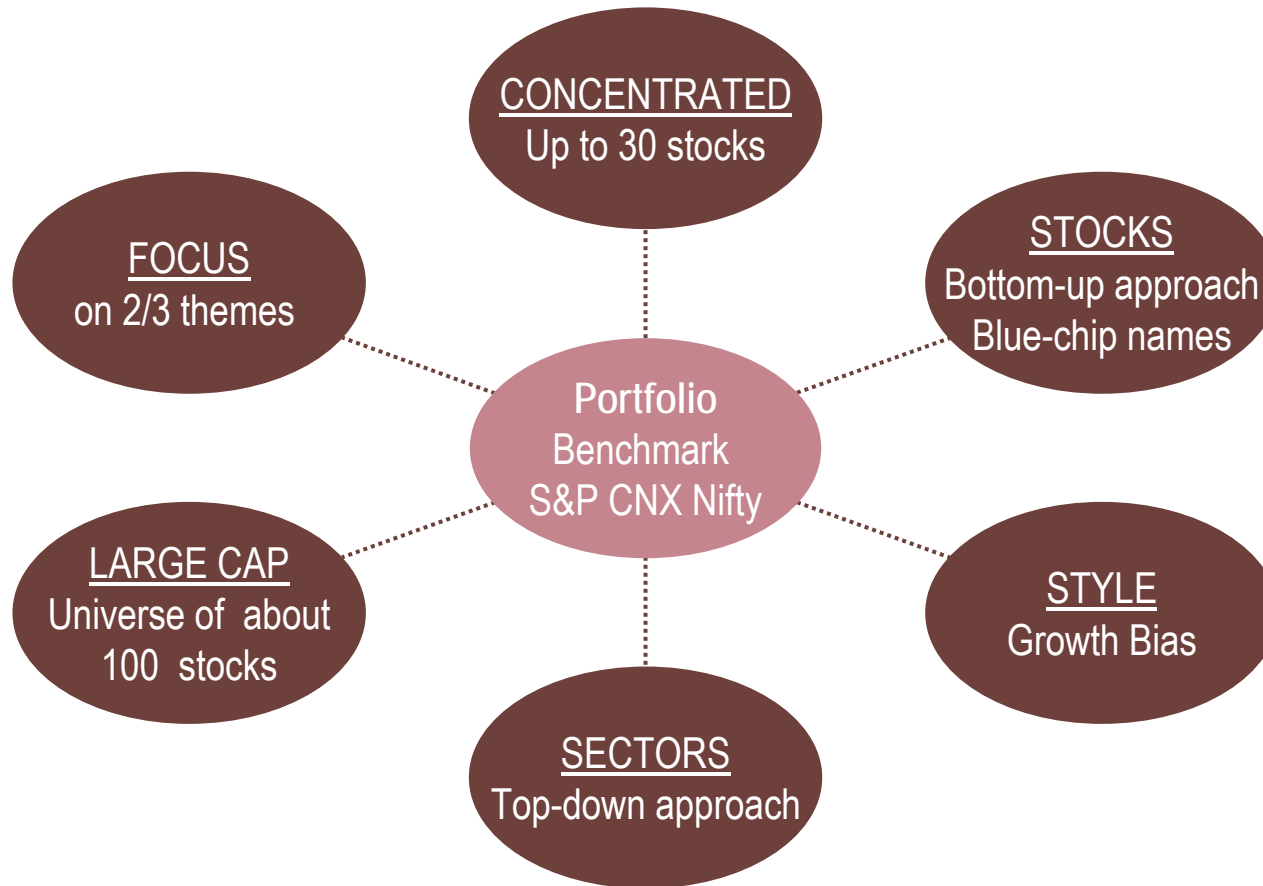
The risk free rate considered for analysis is 7.651% per annum (10 year T-Bill)

Past Performance may or may not be sustained in future

Data source : Bloomberg; Computation: In-house ; As on June 30, 2010

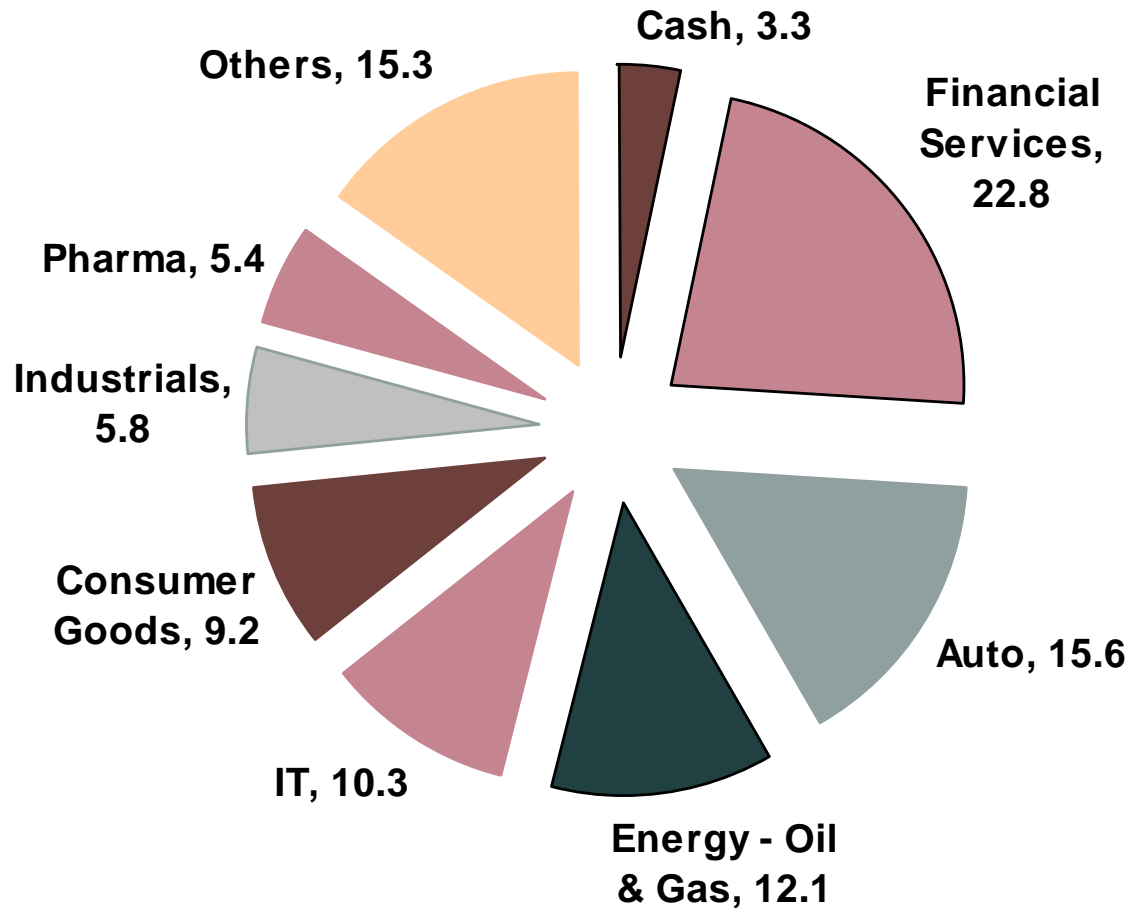
Fund Snapshot

Select Focus Broad portfolio strategy



Investment objective | To achieve capital appreciation by investing in a very few select Indian stocks

Select Focus Sector Allocation



As on June 30, 2010; Source: Fact Sheet

Select Focus Preferred sectors, stocks

Main Active Positions - Sectors

Overweight	Fund	Benchmark	Active
Auto	15.6	5.8	9.8
Media & Entertainment	3.2	0.0	3.2
Pharma	5.4	2.4	3.0
Underweight	Fund	Benchmark	Active
Industrial Manufacturing	5.8	11.4	-5.6
Energy-Oil & Gas	12.1	17.7	-5.6
Metals	2.9	7.2	-4.3

Position status is relative to benchmark

Main Active Positions - Stocks

Overweight	Underweight
Dr Reddy's Labs	Reliance Industries
Tata Tea	HDFC Bank
Bajaj Auto	B H E L
Sun TV	Infosys
Cairn India	Larsen & Toubro

Position status is relative to benchmark

As on June 30, 2010; Source: Fact Sheet

Select Focus Portfolio

Company	Weight %
Reliance Industries	6.7
Infosys	6.2
ICICI Bank	6.2
Dr Reddy's Labs	5.4
Axis Bank	4.5
ITC	4.2
Larsen & Toubro	4.1
State Bank of India	4.1
T C S	4.0
Tata Tea	4.0
Bajaj Auto	3.6
Cairn India	3.5
Sun TV	3.2
M & M	3.2

Company	Weight %
Maruti	3.1
H D F C	3.1
Sterlite Industries	2.9
Tata Motors (Class A)	2.7
Indian Hotels	2.6
Lanco Infratech	2.6
StanChart IDR	2.0
O N G C	1.9
Tata Power	1.8

Company	Weight %
TVS Motor	1.8
Siemens India	1.7
H D F C (Warrants)	1.6
Bajaj Finserv	1.4
Ashok Leyland	1.2
Grasim	1.1
Titan Industries	1.1
Sobha Developers	1.0
Equity	96.6
Debt	1.3
Derivatives	-
Cash & Equivalents	2.1
AUM (Rs Crore)	1148

Source: Fact Sheet as on June 30, 2010

Profile of portfolio manager



Srividhya Rajesh is a CFA Charter Holder and a management graduate from BITS Pilani. She has also done specialized courses in equity research & financial applications from ICFAI.

Traveling, trekking and gardening are her interests away from the world of stocks.

Srividhya Rajesh is the portfolio manager for Sundaram BNP Paribas Select Focus. She has been with Sundaram BNP Paribas for ten years. She brings rich experience to fund management having tracked markets through several bullish and bearish phases. She is also the fund manager for Capex Opportunities. With a sizeable part of her fund portfolio oriented towards large-cap stocks, she keeps a close tab on macro-economic and sector trends. This is especially important for Select Focus, as its portfolio is heavy on three themes at any point.

She follows a combination of top-down and bottom-up approaches based on the fund specification. Once the sectors are identified, the emphasis shifts to the bottom-up approach, even though the fund is focused in the large-cap space and invests in stocks that are extensively researched. This style has enabled her to zero in on themes and stocks that have helped the fund outpace the Nifty by a comfortable margin. A two-year stint at the broking arm Kotak Mahindra opened a window to the equity markets before she joined Sundaram BNP Paribas in 1996.

SMS: SFUND to 56767

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www.sundarambnpparibas.in

Call: 044 28578700

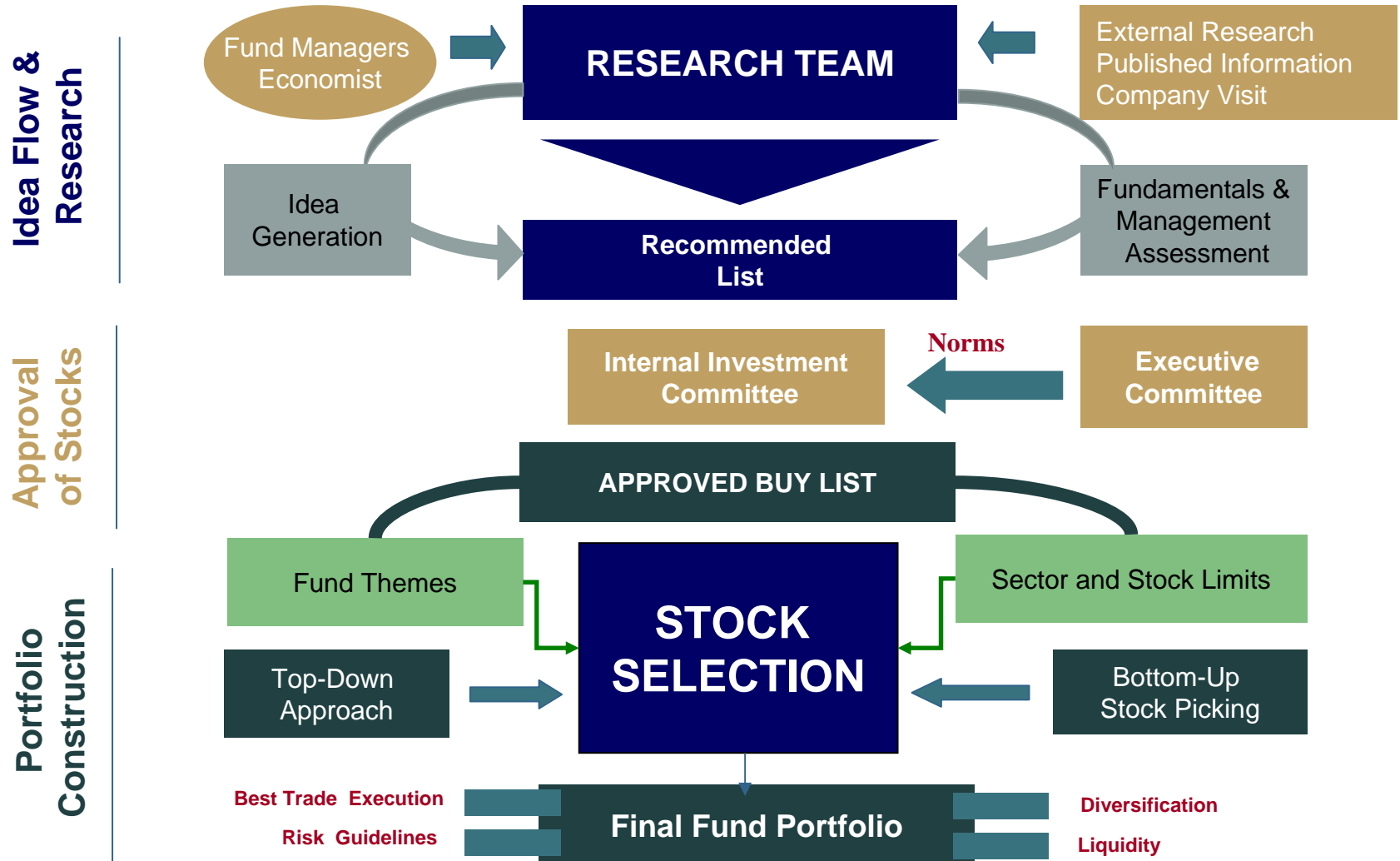
E-mail:service@sundarambnpparibas.in



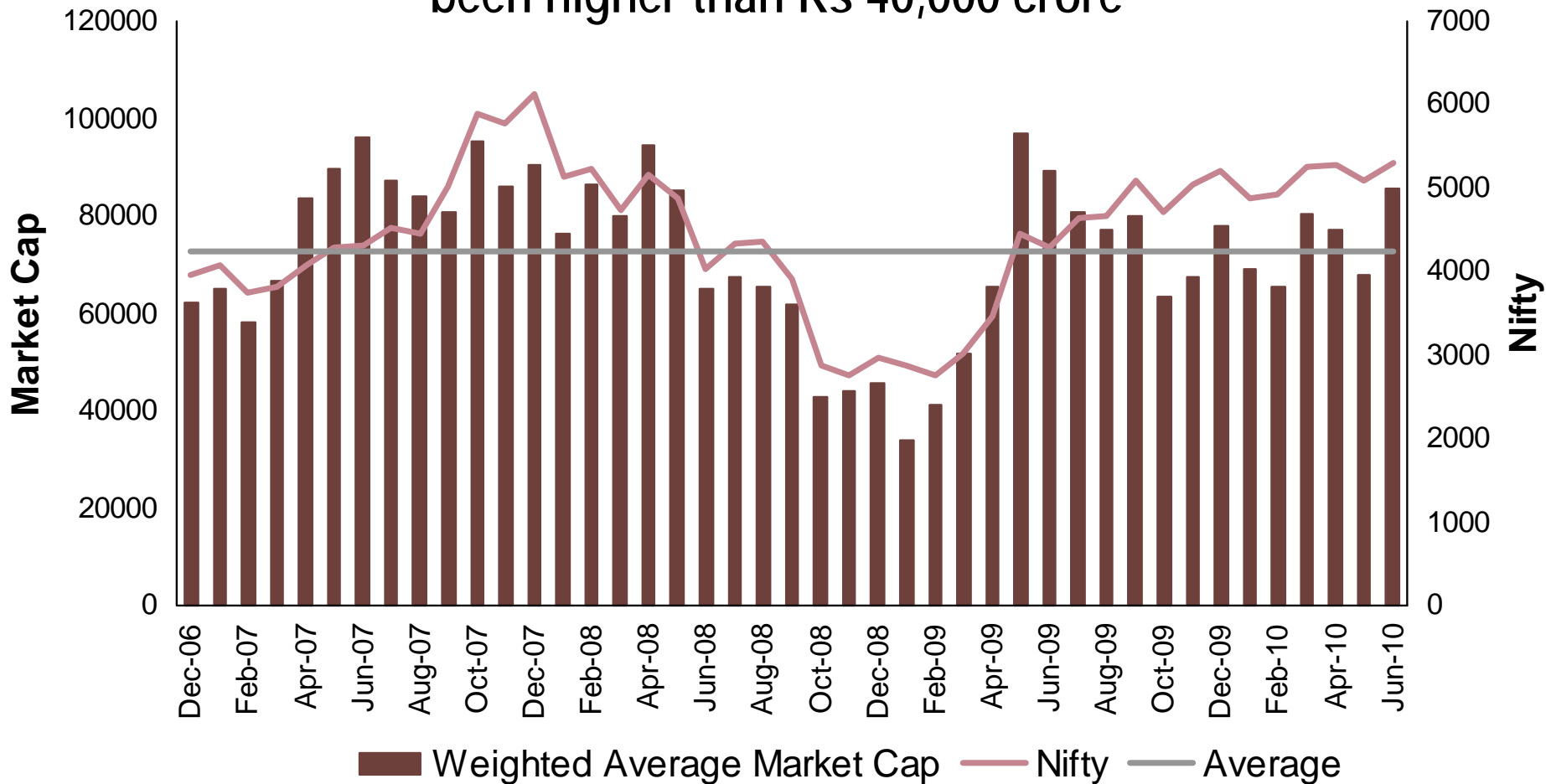
Thank
You

Additional Information

Select Focus Investment process

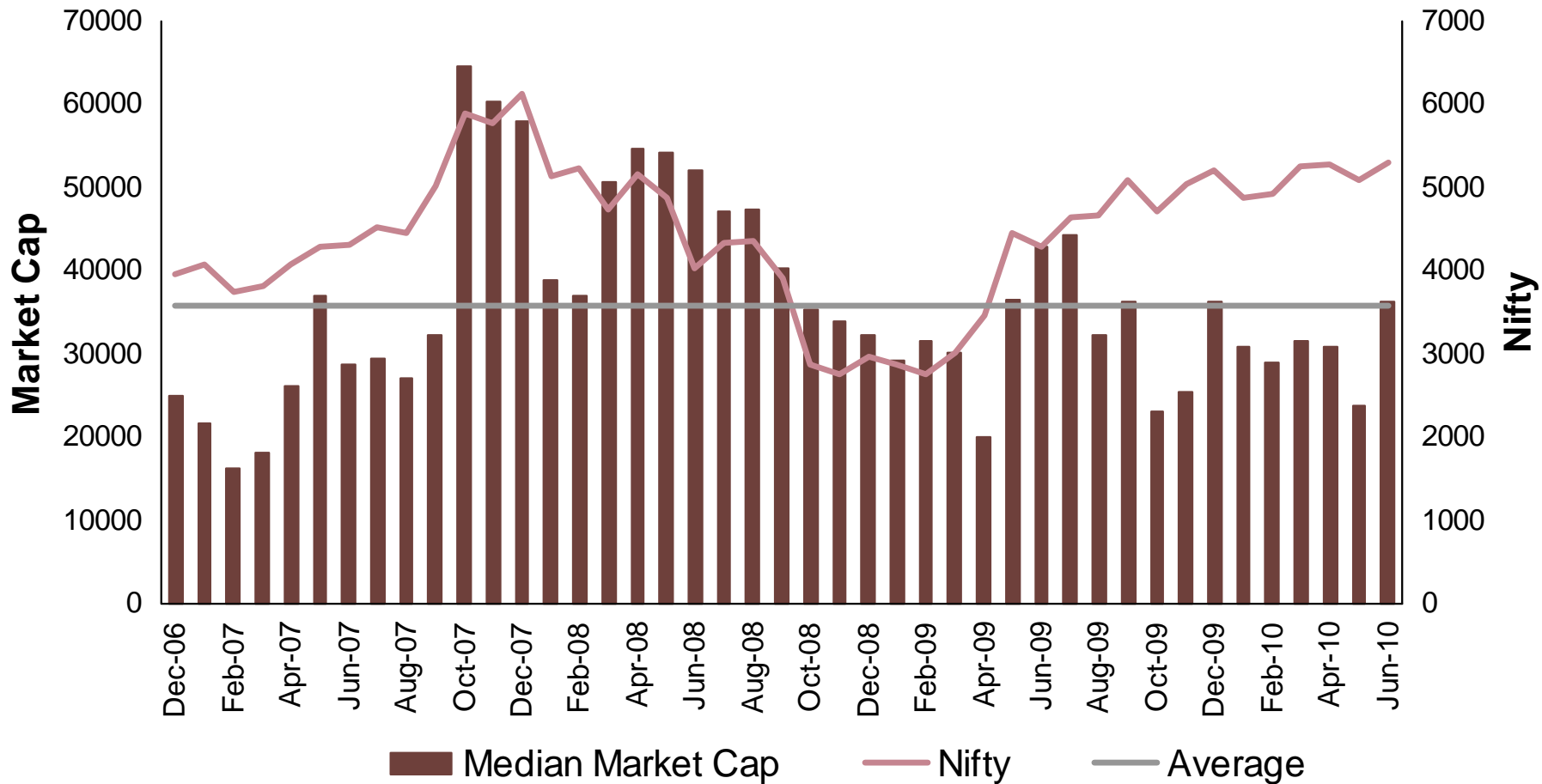


Weighted average market cap has consistently been higher than Rs 40,000 crore



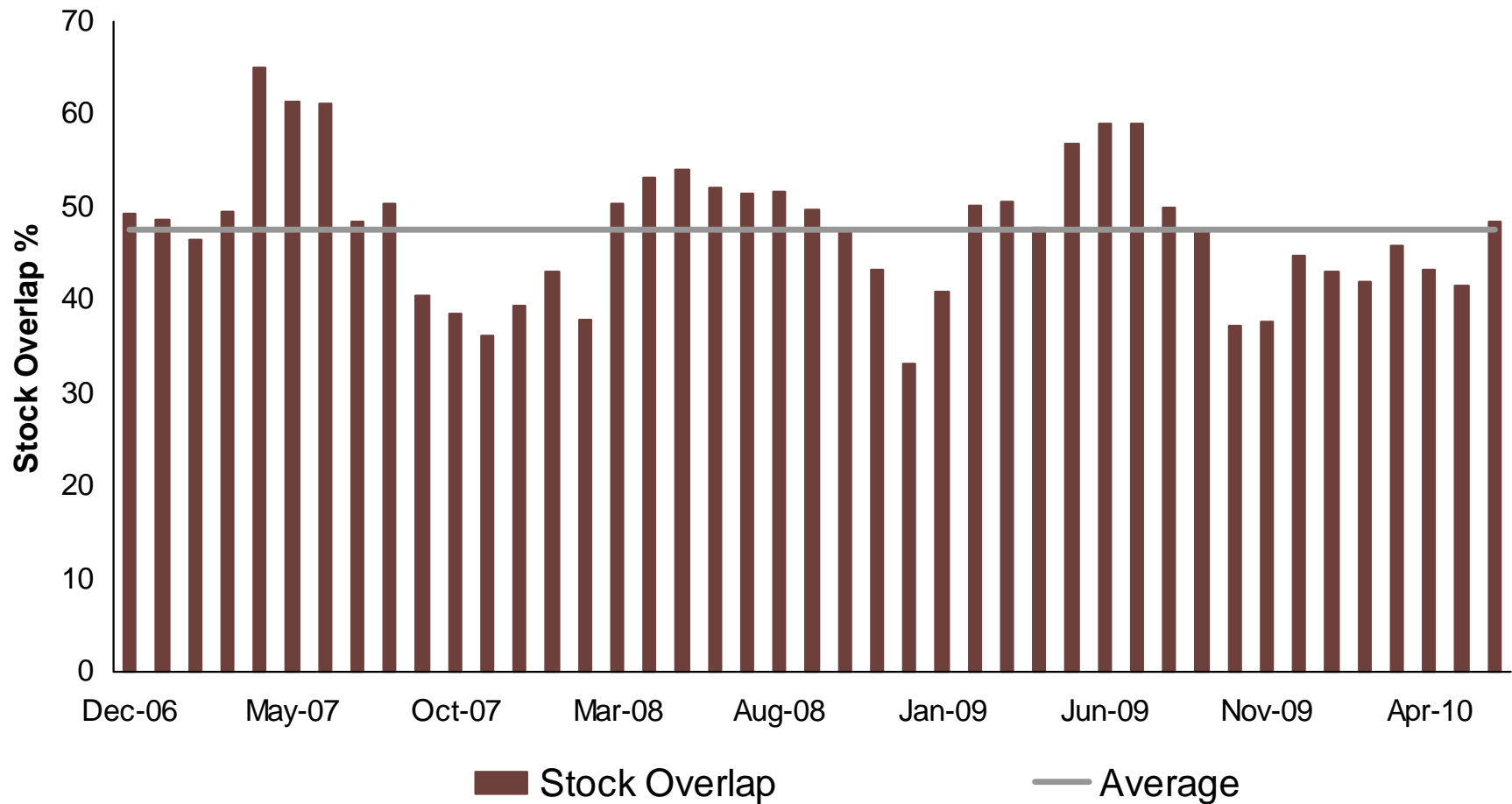
Data Source: Bloomberg & In house; Analysis: In house

Median market cap



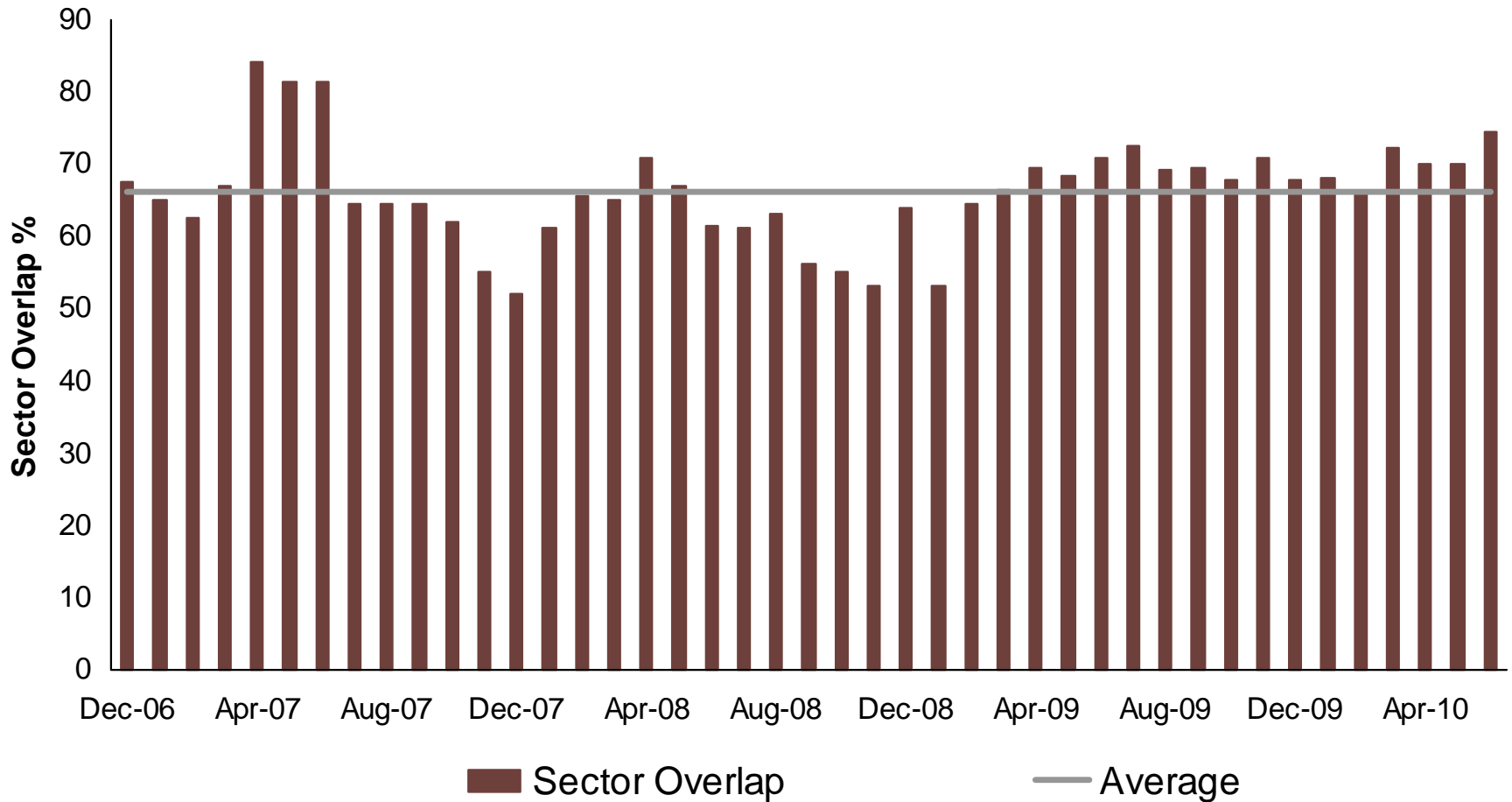
Data Source: Bloomberg & In house; Analysis: In house

Low stock overlap, source of alpha



Data Source: Bloomberg & In house; Analysis: In house

Source of alpha from sector overlap



Data Source: Bloomberg & In house; Analysis: In house

2002

Most preferred ideas: # of months during the year the theme figured in the top three ideas

IT	5	} 12 out of 15
Auto	3	
Cash	3	
Banks	1	
Metals	1	
Pharma	1	
Consumer	1	

Aug	IT	Consumer	Banks
Sep	Cash	Pharma	IT
Oct	Cash	IT	Auto
Nov	IT	Auto	Cash
Dec	IT	Auto	Metals

Select Focus Preferred themes

2003

Most preferred ideas: # of months during the year the theme figured in the top three ideas

Banks	8	} 26 out of 36
Metals	6	
Auto	6	
Cash	6	
Engineering	3	
IT	3	
Pharma	2	
Energy	1	
Construction	1	

Jan	Banks	Cash	Auto
Feb	Banks	Engineering	Cash
Mar	Banks	Cash	Pharma
Apr	Banks	Cash	Auto
May	Banks	Cash	Engineering
June	Banks	Metals	Construction
July	Metals	Auto	Cash
Aug	IT	Energy	Pharma
Sep	Metals	Auto	Banks
Oct	Metals	Auto	Banks
Nov	Auto	Metals	IT
Dec	Metals	IT	Engineering

Source: Fact Sheet

2004

Most preferred ideas: # of months during the year the theme figured in the top three ideas

Auto	9	} 27 out of 36
IT	7	
Cash	6	
Metals	5	
Chemicals	4	
Banks	3	
Consumer	1	
Energy	1	

Jan	Auto	Cash	IT
Feb	Cash	Auto	Metals
Mar	Cash	Chemicals	Auto
Apr	Banks	Auto	Cash
May	Cash	IT	Auto
June	Cash	IT	Auto
July	IT	Chemicals	Auto
Aug	IT	Chemicals	Consumer
Sep	Metals	Chemicals	IT
Oct	IT	Metals	Energy
Nov	Auto	Banks	Metals
Dec	Banks	Auto	Metals

Source: Fact Sheet

Select Focus Preferred themes

2005

Most preferred ideas: # of months during the year the theme figured in the top three ideas

Banks	9	} 27 out of 36
Energy	7	
Engineering	7	
Metals	4	
Cash	3	
IT	2	
Cement	2	
Auto	1	
Consumer	1	

Jan	Banks	Auto	Metals
Feb	Metals	Banks	Energy
Mar	Banks	Cement	Metals
Apr	Cash	Banks	Cement
May	Metals	Banks	Energy
June	Banks	Energy	Engineering
July	Banks	Engineering	Energy
Aug	Engineering	Banks	Consumer
Sep	Cash	Engineering	Banks
Oct	Cash	Engineering	Energy
Nov	Engineering	Energy	IT
Dec	Engineering	IT	Energy

Source: Fact Sheet

2006

Most preferred ideas: # of months during the year the theme figured in the top three ideas

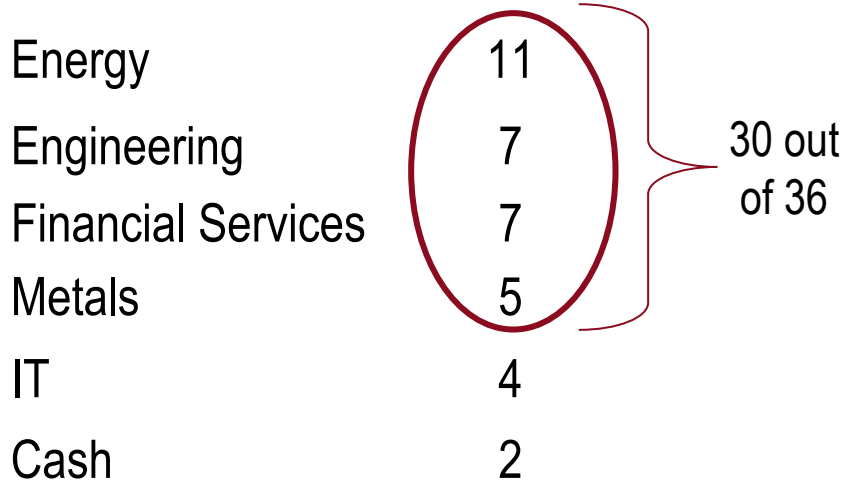
Engineering	12	} 31 out of 36
Energy	8	
IT	7	
Cash	4	
Consumer	2	
Banks	1	
Auto	1	
Cement	1	

Jan	Engineering	Consumer	Energy
Feb	Engineering	Energy	Auto
Mar	Engineering	IT	Consumer
Apr	Engineering	Cement	Energy
May	Cash	Engineering	Energy
June	Cash	Engineering	Energy
July	Cash	Engineering	IT
Aug	Engineering	IT	Cash
Sep	Engineering	IT	Energy
Oct	IT	Engineering	Energy
Nov	IT	Engineering	Banks
Dec	IT	Energy	Engineering

Source: Fact Sheet

2007

Most preferred ideas: # of months during the year the theme figured in the top three ideas



Jan	IT	Engineering	Energy
Feb	IT	Cash	Engineering
Mar	Cash	Energy	Engineering
Apr	Energy	IT	Engineering
May	Energy	Engineering	Financial Services
June	Energy	Financial Services	IT
July	Energy	Financial Services	Engineering
Aug	Energy	Engineering	Metals
Sep	Energy	Metals	Financial Services
Oct	Metals	Energy	Financial Services
Nov	Metals	Energy	Financial Services
Dec	Metals	Energy	Financial Services

Source: Fact Sheet

Select Focus Preferred themes

2008

Most preferred ideas: # of months during the year the theme figured in the top three ideas

Energy	12	} 34 out of 36
Cash	12	
Financial Services	8	
IT	2	
Metals	1	
Telecom	1	

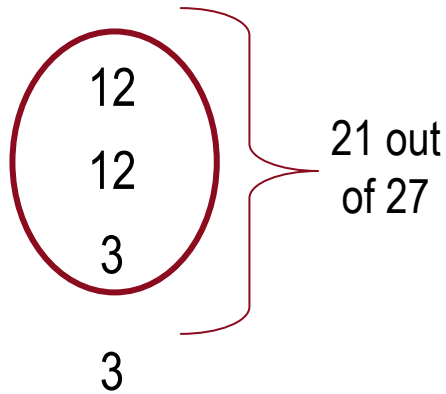
Jan	Energy	Cash	Metals
Feb	Energy	Financial Services	Cash
Mar	Cash	Energy	Financial Services
Apr	Energy	Financial Services	Cash
May	Energy	Cash	IT
June	Cash	Energy	IT
July	Cash	Energy	Telecom
Aug	Cash	Energy	Financial Services
Sep	Cash	Energy	Financial Services
Oct	Cash	Financial Services	Energy
Nov	Cash	Financial Services	Energy
Dec	Financial Services	Cash	Energy

Source: Fact Sheet

2009

Most preferred ideas: # of months during the year the theme figured in the top three ideas

Energy
Financial Services
Cash
Industrial
Manufacturing

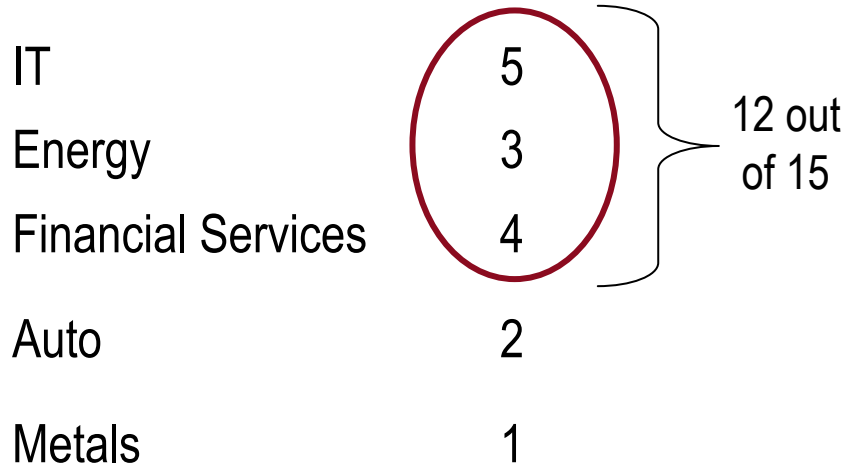


Jan	Cash	Energy	Financial Services
Feb	Cash	Energy	Financial Services
Mar	Energy	Cash	Financial Services
Apr	Energy	Financial Services	Industrial Manufacturing
May	Energy	Financial Services	Industrial Manufacturing
June	Energy	Financial Services	Industrial Manufacturing
July	Energy	Financial Services	IT
Aug	Energy	IT	Financial Services
Sep	Energy	Financial Services	Metals
Oct	Financial Services	Energy	Metals
Nov	Financial Services	Energy	Metals
Dec	Energy	Financial Services	IT

Source: Fact Sheet

2010

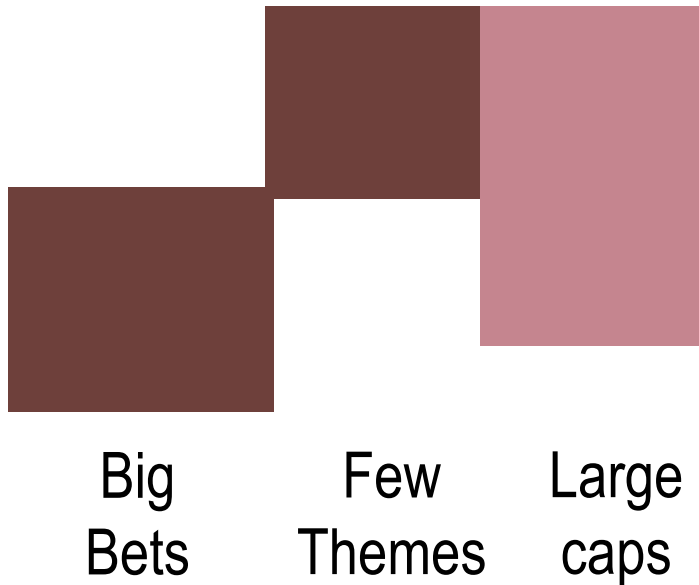
Most preferred ideas: # of months during the year the theme figured in the top three ideas



Jan	Energy	IT	Metals
Feb	Energy	IT	Financial Services
Mar	Financial Services	IT	Energy
Apr	Financial Services	IT	Auto
May	Financial Services	IT	Auto
June	Financial Services	Auto	Energy

Source: Fact Sheet

Risk grid



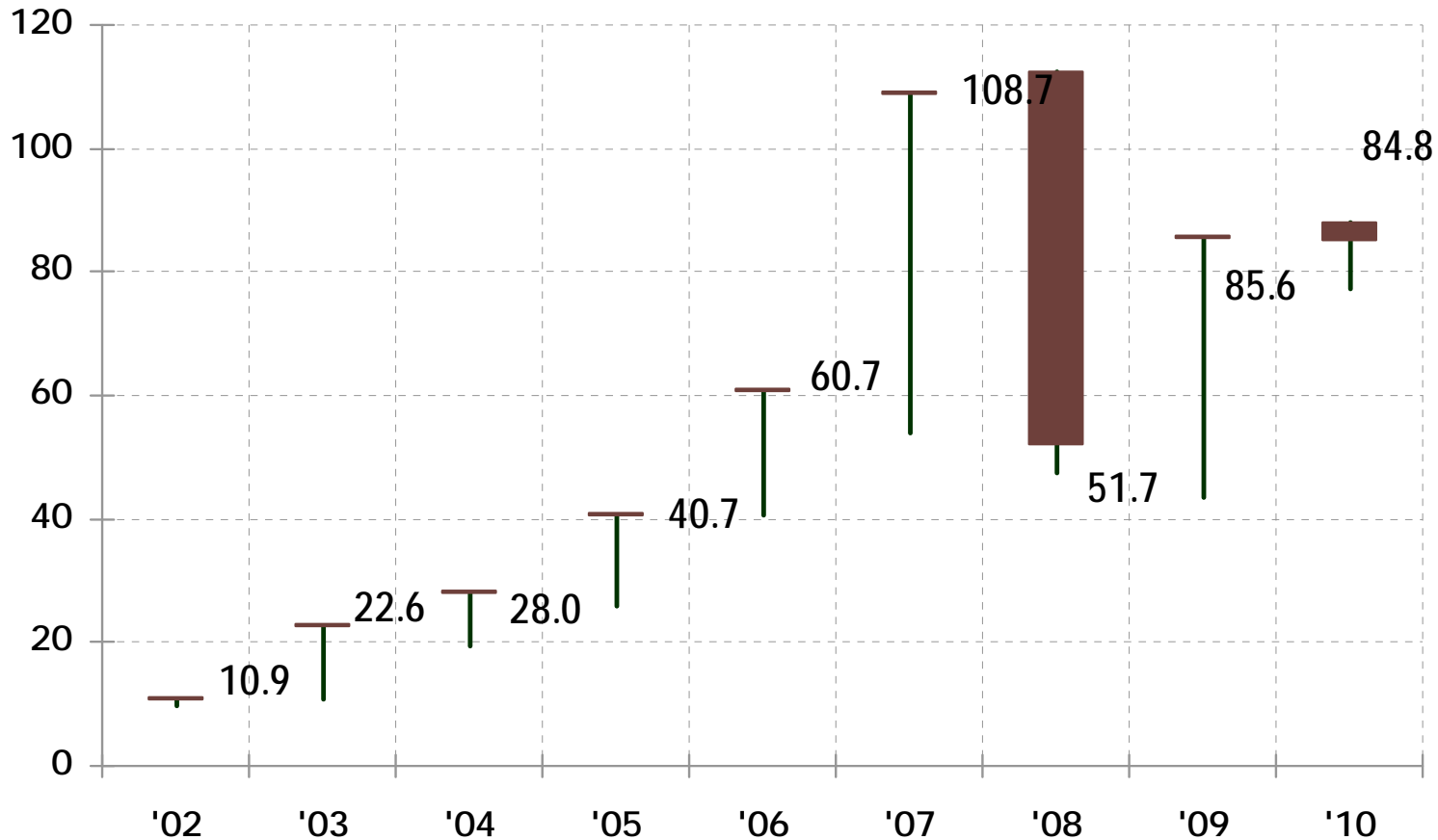
- Core option for large-cap portfolio
- For investors starting a fund portfolio
- Investors who have a mid- cap bias in the portfolio
- Seek the comfort of blue chip names in the portfolio
- Have an investment horizon of three-to-five years

Allotment Date	July 2002		
NAV (June 30, 2010)	Growth: Rs 84.8157		Dividend: Rs 10.9875
Plans / Options	Regular & Institutional / Growth, Dividend Payout , Re-investment & Sweep		
Minimum Subscription Amount			
Regular Plan	First Investment: Rs 5000		Subsequent Purchase: Rs 500
Institutional Plan	First Investment: Rs 5000		Subsequent Purchase: Rs 500
SIP	Rs 250 per month	Rs 750 per quarter	Rs 1000 per week
Weekly SIPs processed on Wednesdays			
Asset allocation			
Equity instruments (including ADRs and GDRs): 75%-100% • Equity futures & options including those of indices: Not exceeding 25% • Cash, cash equivalents, money market instruments: Not exceeding 25%. Exposure in derivative shall not exceed 25% of the portfolio. Equity Investments may also include overseas securities, up to a maximum of 35% of the net assets.			
Objective			
Seek capital appreciation (For detailed investment objective refer disclaimer)			
Load Structure			
Terms of Offer	NAV		
Exit Load	1% if redeemed within twelve months from the date of allotment		

Source: Fact Sheet

Select Focus NAV over the years

The length of the line indicates the range of NAV movement during the period and a bar drops to show the closing value



Past Performance may or may not be sustained in future
NAV of Growth Option as on June 30, 2010

Select Focus Disclosures & disclaimer

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Fund Facts: Name: Sundaram BNP Paribas Select Focus; Type: an open end equity scheme; Investment Objective: To seek capital appreciation by investing in a very few select stocks; Asset Allocation: Equity instruments (including ADRs and GDRs): 75%-100% Equity futures & options including those of indices: Not exceeding 25% Cash, cash equivalents, money market instruments: Not exceeding 25%. Exposure in derivative shall not exceed 25% of the portfolio. Equity Investments may also include overseas securities, up to a maximum of 35% of the net assets. Benchmark: S & P CNX Nifty. Minimum Investment Amount: Rs 5,000. Entry load: There is no entry load. Exit Load: 1% if redeemed within 12 months from date of allotment for Regular Plan & Institutional Plan. There is no exit load for bonus units and dividend re-investment. NAV publication/sale/redemption is available on business days. **Dividend Declared:** (Record Date; % declared; Rs. per unit; NAV as on record date) : 20-6-2003; 20.0; 2.0; 12.5 :: 12-09-2003; 25.0; 2.5; 14.15 :: 20-08-04; 40.0; 4.0; 14.79:: 04-03-05; 20.0; 2.0; 14.68 :: 27-01-06; 20.0; 2.0; 18.79 :: 02-06-06; 50.0; 5.0; 18.20 :: 24-11-06; 35.0; 3.5; 16.33 :: 30-11-07; 65.0; 6.5; 21.73:: Dividend is declared on the face value of Rs 10 per unit. After declaration and payment of dividend (including re-investment), the ex-dividend NAV will decline to the extent of the dividend payment.

Disclaimers: *Limited Comparison with all equity funds' returns:* The returns for all equity diversified funds comprise all funds classified in Equity Diversified and Tax- Planning categories by Value Research. The funds in the two categories have been considered together and there has been no separate sub-classification by Sundaram BNP Paribas Asset Management. The number of schemes covered for different periods are given in the accompanying table:

Number of schemes	1 Year	2 Years	3 Years	5 Years	6 Years	7 Years
All-equity funds	363	305	234	151	120	100
Large-cap funds	16	16	16	12	12	10

Select Focus Disclosures & disclaimer

Comparison with large-cap funds: The returns for the large-cap funds is based on the average of returns of a sub-category created by Sundaram BNP Paribas Asset Management from the broad category of funds classified as equity diversified by Value Research. This sub-category includes funds that consistently invest at least 85%-90% in large-cap stocks. The funds have been chosen in good faith based on the allocation to the top 50 stocks by market cap and the consistency in maintaining such a profile. This comparison does not reflect the effect of objectives, style, asset allocation, entry load, exit load and fess & expenses. This is not intended for ranking purposes and does not also constitute ranking. This is only meant for comparison purposes. The average of returns for the combined universe of the two Value Research categories has been sourced from the Value Research Daily Performance Report. The average returns are as on March 31, 2010 and is based on compounded annual returns (computed using NAV of the Growth Option and/or NAV adjusted dividend reinvestment) for more than one year. Past performance is no guarantee of future result.

	Three Months	Six Months	One Year	Two Years	Three Years	Five Years	Six Years	Seven Years	
Peer Group Ranking		11/17	6/17	15/16	13/16	9/16	3/12	5/12	4/10

Ranking-Since Launch Disclaimer: The ranking for Sundaram BNP Paribas Select Focus indicated in this document is based the equity mid-cap schemes category of Value Research. Performance data and ranking for the indicated periods for schemes in this category has been provided by Value Research. The performance for ranking purposes has been reckoned as on March 31, 2010 and is based on compounded annual returns (computed using NAV of the Growth Option and/or NAV adjusted dividend reinvestment) for more than one year. The comparison does not take account into scheme-specific features such as launch period entry/exit loads, expenses and fees, to name a few. Attributes such as style and portfolio composition may also differ. Past performance is no guarantee of future result. **Basis for inclusion in sub-category:** For every fund of Sundaram BNP Paribas Mutual Fund, the sub-category includes all equity funds as on date of allotment of the respective fund. The included funds for comparison of each equity fund of Sundaram BNP Paribas Mutual will include funds that were launched on the same date, funds as well as funds that had been launched prior to that date. Only such funds have been considered provided they continued to be in existence as of March 31, 2010. The comparison does not take account into scheme-specific features such as specific asset allocation pattern, specific cap-curve or thematic orientation, entry/exit loads, expenses and fees and respective benchmarks for each fund considered for analysis. Attributes such as style and portfolio composition may also differ though the funds invest predominantly in equity and this latter aspect provides a common thread for creating a sub-category of comparable funds. **Basis for exclusion in sub-category:** For every equity fund of Sundaram BNP Paribas Mutual, equity funds from the primary category of Value Research that have been launched after the allotment date of the respective fund has not been included in the sub-category for each fund. The exclusion is logical as the focus of this presentation is to compare the performance of all equity funds that existed on the respective date of allotment every equity product of Sundaram BNP Paribas Mutual and evaluate how every fund of Sundaram BNP Paribas Mutual have fared relative to the choice available to investors on the launch date of that fund.

Select Focus Disclosures & disclaimer

Basic Information: The research on historical performance on which the quartiles and ranking are based has been sourced from Value Research, NAV India (an independent third party vendor of fund intelligence in India) and Bloomberg. The performance for ranking purposes has been reckoned as on March 31, 2010. The analysis of the information has been carried in good faith in-house by Sundaram BNP Paribas Asset Management. Past performance is no guarantee of future result. The internal ranking is based on combining the funds classified in two primary categories by Value Research: Equity Diversified and equity tax planning. The peer set used for internal ranking has not been created or approved by Value Research. As Value Research used a three- and five-year periods, its two categories include only funds with at least a three or five year track record. All equity funds are usually in this two category once they complete the time-period for eligibility. This is why for funds launched after December 2005, the number of equity funds taken as a basis for comparison is higher than what is indicated in the Value Research Disclaimer for the two categories. Due to limitation on availability of star rankings for funds other than those indicated, star rankings for other Sundaram BNP Paribas funds has not been indicated. The returns are on compounded annual returns computed using NAV of the Growth Option and/or NAV adjusted dividend reinvestment. Past performance may or may not be sustained in future. Past performance does not guarantee future result. Peer set excel comparison for each sub-category is also available at www.sundarambnpparibas.in **Quartile Disclaimer:** The ranks derived on the basis of the methodology described in the Ranking Disclaimer has been used as the basis for categorising funds into first quartile (top 25% of funds by rank), second quartile (the second 25% by rank), third quartile (the third 25% by rank) and fourth quartile (the fourth 25% by rank). For example, if there are 100 funds, funds ranked between 1- 25 will be quartile 1, 26-50 Quartile 2, 51-75 Quartile 3 and 76-100 Quartile 4. The research on historical performance on which the quartiles and ranking are based has been sourced from Value Research, NAV India (an independent third party vendor of fund intelligence in India) and Bloomberg. The performance for ranking purposes has been reckoned March 31, 2010. The analysis of the information has been carried in good faith in-house by Sundaram BNP Paribas Asset Management. The comparison does not take account into scheme-specific features such as specific asset allocation pattern, specific cap-curve or thematic orientation, entry/exit loads, expenses and fees and respective benchmarks for each fund considered for analysis. Attributes such as style and portfolio composition may also differ though the funds invest predominantly in equity and this latter aspect provides a common thread for creating a sub-category of comparable funds. Past performance may or may not be sustained in future. Past performance does not guarantee future result.

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