ADDENDUM

Pursuant to SEBI Circular No SEBI/HO/IMD/IMD-PoD-2/P/CIR/2022/172 dated December 16, 2022, this addendum sets out changes to be made in Section V. Services Offered by the Portfolio Manager and related 'Annexures' of the Disclosure Document.

Investors /Clients to note that , in addition to investment Approach (IA), an additional layer of broadly defined investment themes called "Strategies" (Like 'Equity', 'Debt', 'Hybrid' and 'Multi Asset') has been adopted by portfolio manager w.e.f 01.04.2023.Further to enable investors/clients to evaluate relative performance of the portfolio based on the benchmarks provided by APMI, the following benchmark has been adopted by Portfolio Manager for respective Strategies and Investment approaches :

Sr. No.	Strategy	Investment Approach	Benchmark
1.	Equity	TATA PMS ACT INVESTMENT APPROACH	S&P BSE 500
2.	Equity	TATA PMS EMERGING OPPORTUNITIES INVESTMENT APPROACH	S&P BSE 500
3.	Equity	TATA PMS ENTERPRISING INDIA INVESTMENT APPROACH	S&P BSE 500
4.	Equity	TATA PMS ENTERPRISING PLUS INVESTMENT APPROACH	S&P BSE 500
5.	Debt	TATA PMS SELECT LIQUID – 3 MONTHS APPROACH	CRISIL Composite Bond Fund Index
6.	Debt	TATA PMS SELECT ULTRA SHORT – 6 MONTHS APPROACH	CRISIL Composite Bond Fund Index
7.	Debt	TATA PMS SELECT SHORT DURATION-12 MONTHS APPROACH	CRISIL Composite Bond Fund Index
8.	Equity	TATA PMS WEALTH CREATOR INVESTMENT APPROACH	S&P BSE 500

Notes:

- This addendum will form an integral part of the Disclosure Document.
- All other terms & conditions of the Disclosure Document read with other addendums if any remain unchanged.

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