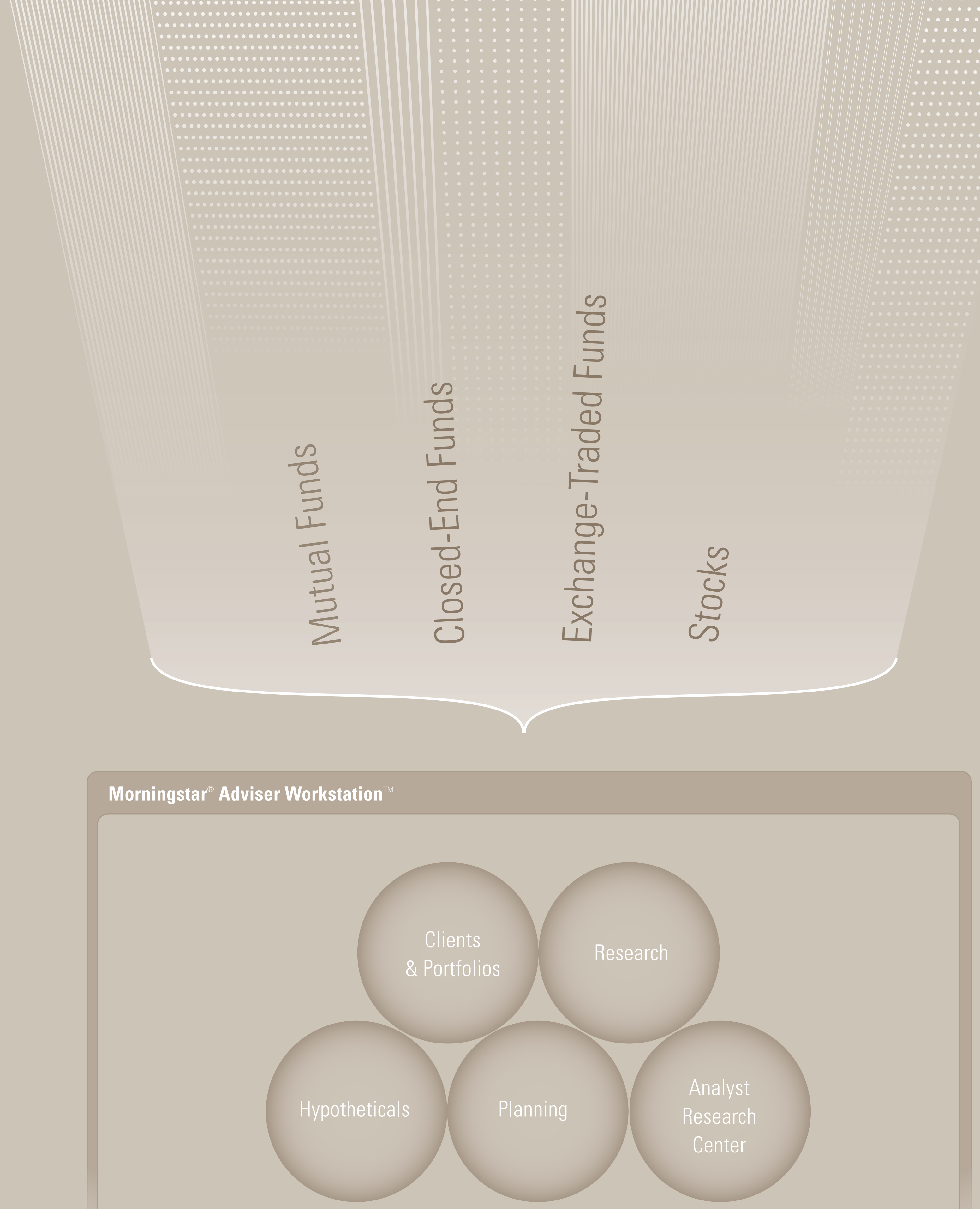
Morningstar® Adviser Workstation™



The latest data for all of Morningstar's investment universes feeds directly into Adviser Workstation's modules to power its analytical, research, market monitoring, reporting and communication capabilities.

Managing an adviser practice is rarely, if ever, a straightforward process. On a daily basis you handle multiple tasks—investment research, portfolio analysis and investment planning. All while serving existing clients with ongoing updates and prospecting for new ones.

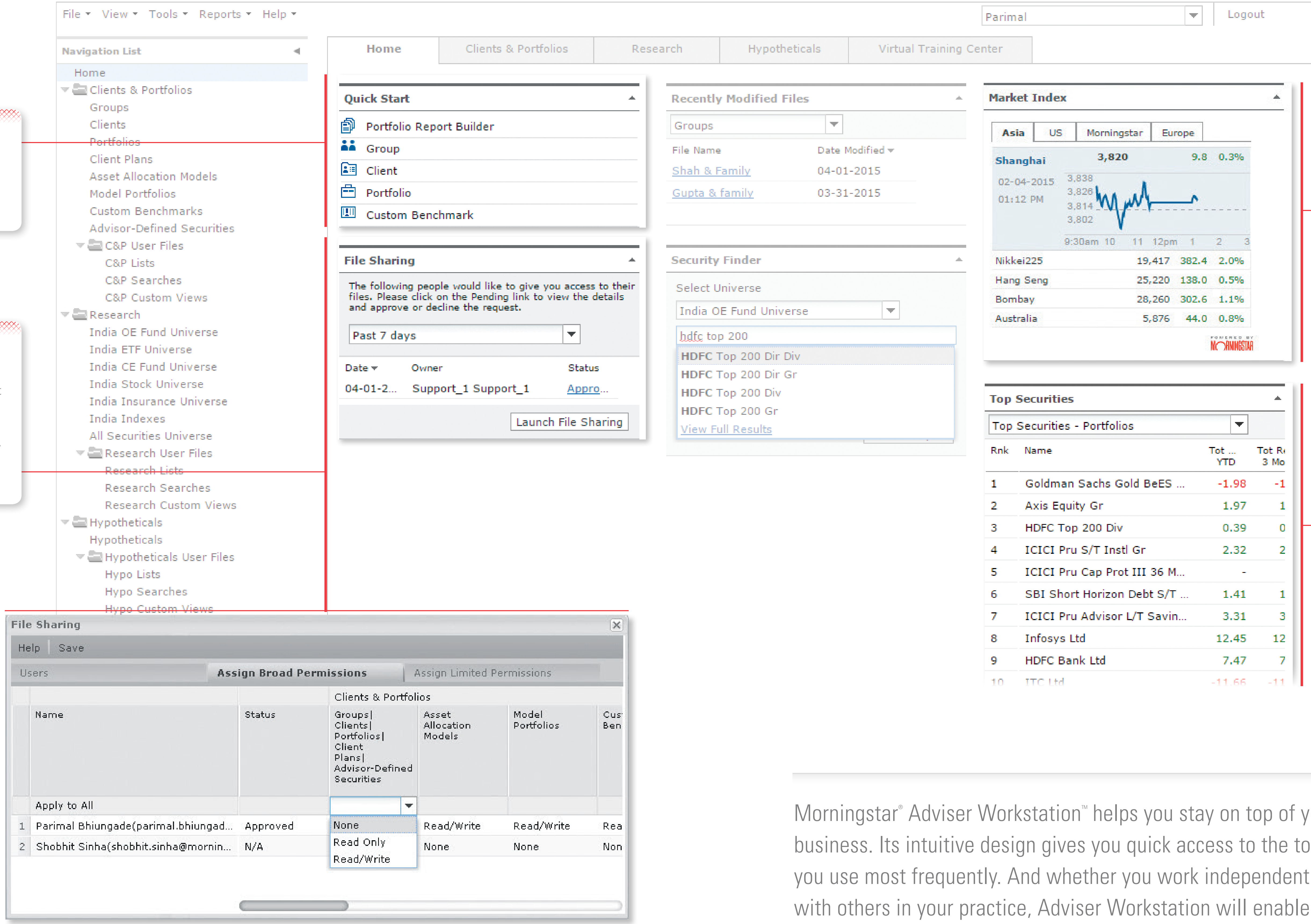
For all of the tasks you perform and roles you play, Morningstar® Adviser Workstation™ can help you do them better. It's a web-based platform, so you'll always have the latest Morningstar investment data, and the most up-to-date client and account information at your fingertips. And its intuitive design and navigation will streamline your daily work.

Best of all, Adviser Workstation helps you get results. Its concise, visually-compelling reports will strengthen your message to clients and make the most convincing case for your recommendations.

Morningstar® Adviser Workstation℠ Home Page

Get to Work Quickly
Launch your most frequently-used tools and reports from the Quick Start menu with just one click.

Fast File Sharing
If you work collaboratively with other advisers or support staff in your practice, Adviser Workstation makes it easy to share client files, searches, lists and hypotheticals with the entire client team.



The Market at a Glance
Watch the Morningstar Market Barometer for the latest daily and historical style-based performance trends.

Stay On Top of Your Practice
Access a favourites list of the top securities in your practice (or any other list you designate) to quickly view performance numbers.

Morningstar® Adviser Workstation℠ helps you stay on top of your entire book of business. Its intuitive design gives you quick access to the tools, files and securities you use most frequently. And whether you work independently or collaborate with others in your practice, Adviser Workstation will enable you to work smarter and more efficiently.

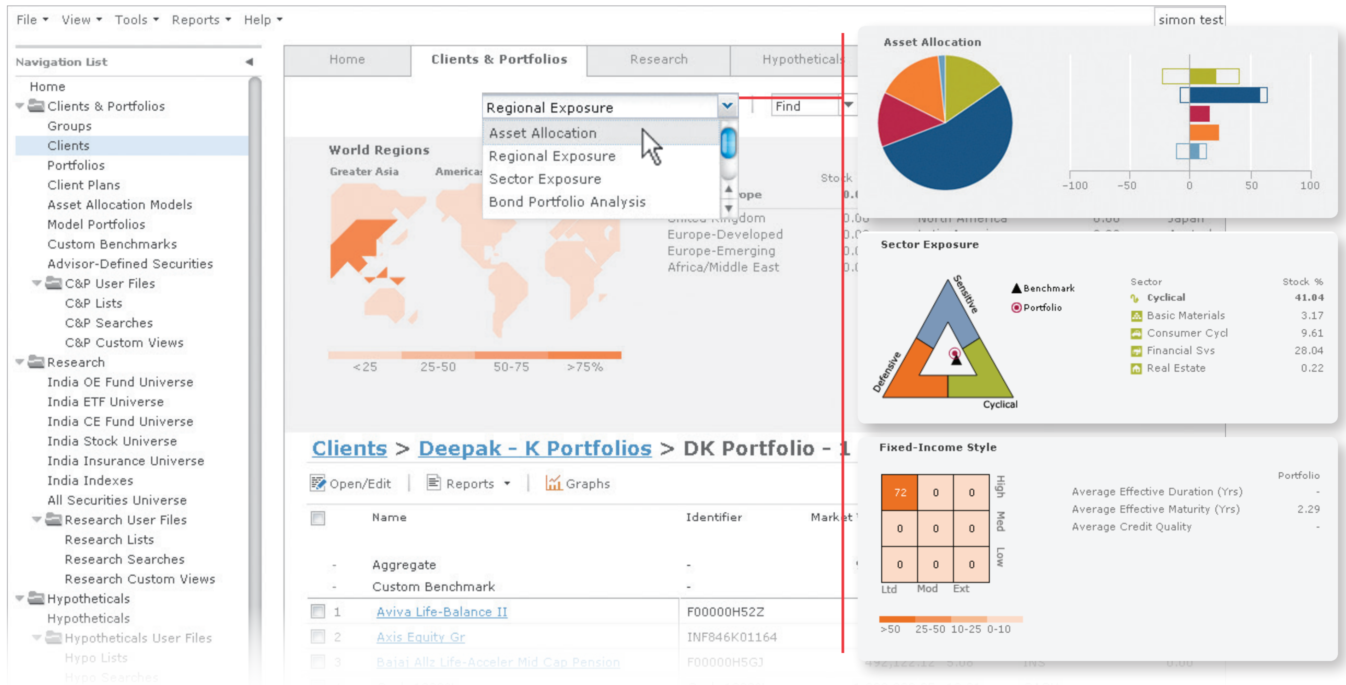
Clients & Portfolios Module

It's your entire practice—arranged for efficient and proactive management. The Clients & Portfolios Module gives you the tools to quickly build, analyse and monitor your clients' portfolios.

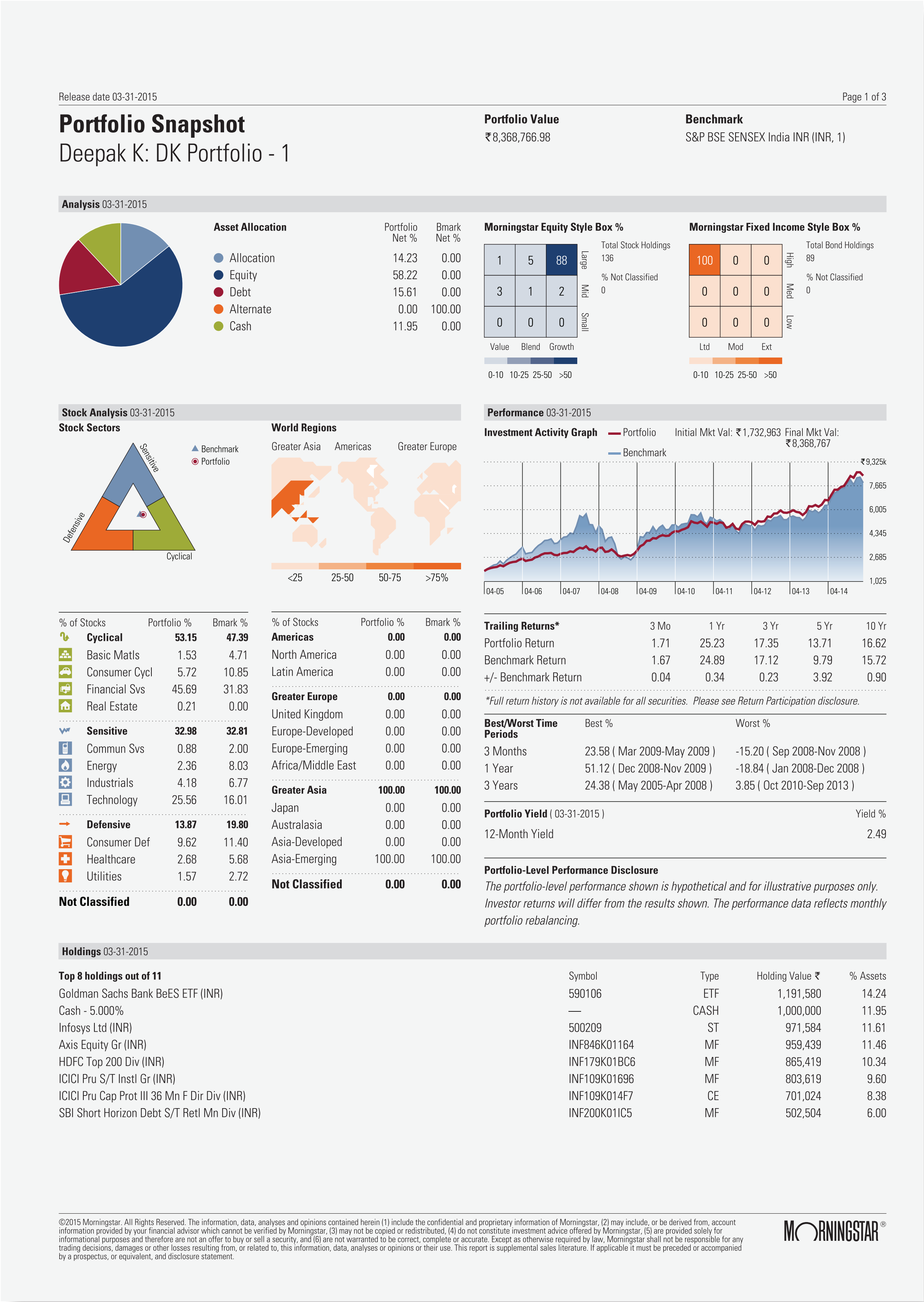
The Clients & Portfolios Module features Morningstar's unmatched capabilities for conducting in-depth portfolio analysis and lets you easily share your insight with clients using our easy-to-understand reports. The Morningstar® Portfolio Snapshot™ report provides a detailed overview of a portfolio's most important aspects, including asset allocation, investment style, sector weightings and performance. Another popular report, Stock Intersection, identifies the portfolio's overall weighting in a particular security or sector.

You'll save significant time and effort by directly importing client holdings. Morningstar® Adviser Workstation™ also helps you work collaboratively with your colleagues via file sharing capabilities that allow you to set permission controls for viewing and editing clients, portfolios, hypothetical illustrations, searches and lists.

The Clients & Portfolios Module makes staying top of your practice—and your daily tasks—a much more manageable process.



The Portfolio View allows you to quickly assess the overall asset allocation, regional exposure, annualised returns, risk and sector exposure of the portfolio. All analysis is based on the latest portfolio holdings in the Morningstar database.



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Portfolio Snapshot
Deepak K: DK Portfolio - 1

Portfolio Value ₹8,368,766.98
Benchmark S&P BSE SENSEX India INR (INR, 1)

Analysis 03-31-2015

Asset Allocation	Portfolio Net %	Bmark Net %
Allocation	14.23	0.00
Equity	58.22	0.00
Debt	15.61	0.00
Alternate	0.00	100.00
Cash	11.95	0.00

Morningstar Equity Style Box %

	Value	Blend	Growth
Large	1	5	88
Mid	3	1	2
Small	0	0	0

Total Stock Holdings 136
% Not Classified 0
0-10 10-25 25-50 >50

Morningstar Fixed Income Style Box %

	Ltd	Mod	Ext
High	100	0	0
Med	0	0	0
Low	0	0	0

Total Bond Holdings 89
% Not Classified 0
0-10 10-25 25-50 >50

Stock Analysis 03-31-2015

Stock Sectors — Benchmark, Portfolio — Sensitive, Defensive, Cyclical

% of Stocks	Portfolio %	Bmark %
Cyclical	**53.15**	**47.39**
Basic Matls	1.53	4.71
Consumer Cycl	5.72	10.85
Financial Svs	45.69	31.83
Real Estate	0.21	0.00
Sensitive	**32.98**	**32.81**
Commun Svs	0.88	2.00
Energy	2.36	8.03
Industrials	4.18	6.77
Technology	25.56	16.01
Defensive	**13.87**	**19.80**
Consumer Def	9.62	11.40
Healthcare	2.68	5.68
Utilities	1.57	2.72
Not Classified	**0.00**	**0.00**

World Regions — Greater Asia, Americas, Greater Europe — <25 25-50 50-75 >75%

% of Stocks	Portfolio %	Bmark %
Americas	**0.00**	**0.00**
North America	0.00	0.00
Latin America	0.00	0.00
Greater Europe	**0.00**	**0.00**
United Kingdom	0.00	0.00
Europe-Developed	0.00	0.00
Europe-Emerging	0.00	0.00
Africa/Middle East	0.00	0.00
Greater Asia	**100.00**	**100.00**
Japan	0.00	0.00
Australasia	0.00	0.00
Asia-Developed	0.00	0.00
Asia-Emerging	100.00	100.00
Not Classified	**0.00**	**0.00**

Performance 03-31-2015

Investment Activity Graph — Portfolio — Benchmark — Initial Mkt Val: ₹1,732,963 Final Mkt Val: ₹8,368,767
₹9,325k 7,665 6,005 4,345 2,685 1,025
04-05 04-06 04-07 04-08 04-09 04-10 04-11 04-12 04-13 04-14

Trailing Returns*	3 Mo	1 Yr	3 Yr	5 Yr	10 Yr
Portfolio Return	1.71	25.23	17.35	13.71	16.62
Benchmark Return	1.67	24.89	17.12	9.79	15.72
+/- Benchmark Return	0.04	0.34	0.23	3.92	0.90

**Full return history is not available for all securities. Please see Return Participation disclosure.*

Best/Worst Time Periods	Best %	Worst %
3 Months	23.58 (Mar 2009-May 2009)	-15.20 (Sep 2008-Nov 2008)
1 Year	51.12 (Dec 2008-Nov 2009)	-18.84 (Jan 2008-Dec 2008)
3 Years	24.38 (May 2005-Apr 2008)	3.85 (Oct 2010-Sep 2013)

Portfolio Yield (03-31-2015)	Yield %
12-Month Yield	2.49

Portfolio-Level Performance Disclosure
The portfolio-level performance shown is hypothetical and for illustrative purposes only. Investor returns will differ from the results shown. The performance data reflects monthly portfolio rebalancing.

Holdings 03-31-2015

Top 8 holdings out of 11	Symbol	Type	Holding Value ₹	% Assets
Goldman Sachs Bank BeES ETF (INR)	590106	ETF	1,191,580	14.24
Cash - 5.000%	—	CASH	1,000,000	11.95
Infosys Ltd (INR)	500209	ST	971,584	11.61
Axis Equity Gr (INR)	INF846K01164	MF	959,439	11.46
HDFC Top 200 Div (INR)	INF179K01BC6	MF	865,419	10.34
ICICI Pru S/T Instl Gr (INR)	INF109K01696	MF	803,619	9.60
ICICI Pru Cap Prot III 36 Mn F Dir Div (INR)	INF109K014F7	CE	701,024	8.38
SBI Short Horizon Debt S/T Retl Mn Div (INR)	INF200K01IC5	MF	502,504	6.00

When discussing portfolio strategies, the Portfolio Snapshot report is an unmatched resource for explaining diversification and risk. Based on the underlying holdings of every investment product in the portfolio, it reveals the composition, investment style and sector exposure of the entire portfolio.

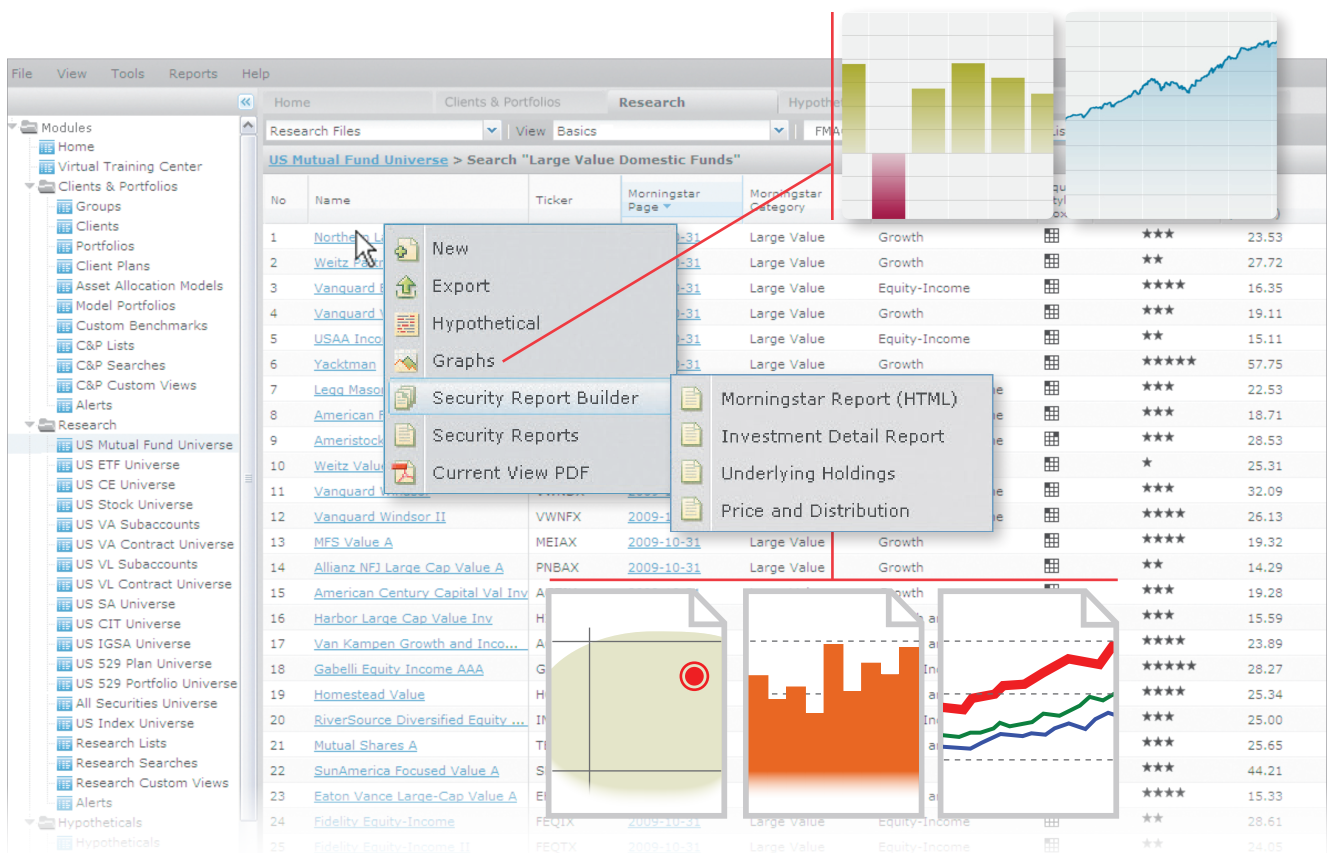
Research Module

Morningstar® Adviser Workstation™ offers the broadest and deepest investment coverage in the industry, along with the most powerful tools available for analysing that information and presenting your results to clients and prospects.

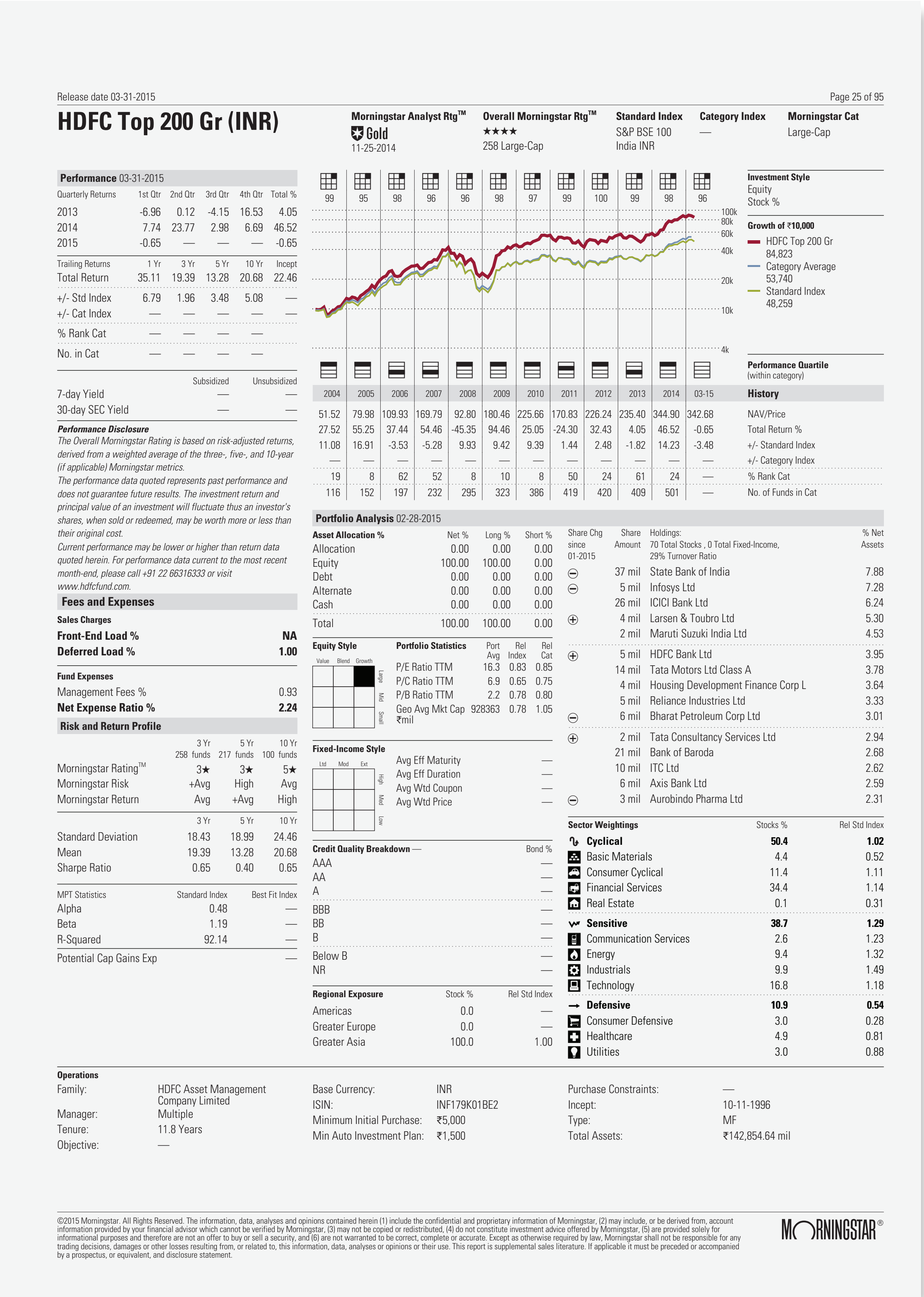
The Research Module provides fundamental and proprietary data for multiple investment universes, as well as popular indexes and Morningstar categories. Yet what's more impressive than the depth and quality of the data is the myriad ways you can use it. Search across all of Morningstar's universes for securities that meet specific investment criteria that you set. After conducting your research, you can save the Boolean logic for future use, create a list of the results or launch Security Report Builder to quickly generate a packet of research materials that can include Investment Detail reports, comprehensive graphs, price and distribution information and the latest underlying holdings.

The research reports you create in the Research Module are based on Morningstar's more than 30-year history of distilling the most essential information about a security into an easy-to-understand format. With rich report options, it's easy to create powerful communication materials based on the specific needs of your clients.

The Research Module lets you take full advantage of Morningstar's approach to investment research and easily share your results.



Adviser Workstation's intuitive navigation structure will help you work more efficiently, making it easy to search and screen securities, create lists and generate reports and graphs. Data from the Research Module can also be exported to Microsoft Excel® and other spreadsheet programs.



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HDFC Top 200 Gr (INR)

Morningstar Analyst Rtg™	Overall Morningstar Rtg™	Standard Index	Category Index	Morningstar Cat
Gold 11-25-2014	★★★★ 258 Large-Cap	S&P BSE 100 India INR	—	Large-Cap

Performance 03-31-2015

Quarterly Returns	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	Total %
2013	-6.96	0.12	-4.15	16.53	4.05
2014	7.74	23.77	2.98	6.69	46.52
2015	-0.65	—	—	—	-0.65

Trailing Returns	1 Yr	3 Yr	5 Yr	10 Yr	Incept
Total Return	35.11	19.39	13.28	20.68	22.46
+/- Std Index	6.79	1.96	3.48	5.08	—
+/- Cat Index	—	—	—	—	—
% Rank Cat	—	—	—	—	
No. in Cat	—	—	—	—	

	Subsidized	Unsubsidized
7-day Yield	—	—
30-day SEC Yield	—	—

Performance Disclosure
The Overall Morningstar Rating is based on risk-adjusted returns, derived from a weighted average of the three-, five-, and 10-year (if applicable) Morningstar metrics.
The performance data quoted represents past performance and does not guarantee future results. The investment return and principal value of an investment will fluctuate thus an investor's shares, when sold or redeemed, may be worth more or less than their original cost.
Current performance may be lower or higher than return data quoted herein. For performance data current to the most recent month-end, please call +91 22 66316333 or visit www.hdfcfund.com.

Investment Style
Equity
Stock %

99	95	98	96	96	98	97	99	100	99	98	96

Growth of ₹10,000
HDFC Top 200 Gr 84,823
Category Average 53,740
Standard Index 48,259

100k 80k 60k 40k 20k 10k 4k

Performance Quartile (within category)

2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	03-15	History
51.52	79.98	109.93	169.79	92.80	180.46	225.66	170.83	226.24	235.40	344.90	342.68	NAV/Price
27.52	55.25	37.44	54.46	-45.35	94.46	25.05	-24.30	32.43	4.05	46.52	-0.65	Total Return %
11.08	16.91	-3.53	-5.28	9.93	9.42	9.39	1.44	2.48	-1.82	14.23	-3.48	+/- Standard Index
—	—	—	—	—	—	—	—	—	—	—	—	+/- Category Index
19	8	62	52	8	10	8	50	24	61	24	—	% Rank Cat
116	152	197	232	295	323	386	419	420	409	501	—	No. of Funds in Cat

Portfolio Analysis 02-28-2015

Asset Allocation %	Net %	Long %	Short %
Allocation	0.00	0.00	0.00
Equity	100.00	100.00	0.00
Debt	0.00	0.00	0.00
Alternate	0.00	0.00	0.00
Cash	0.00	0.00	0.00
Total	100.00	100.00	0.00

Equity Style
Value Blend Growth
Large Mid Small

Portfolio Statistics	Port Avg	Rel Index	Rel Cat
P/E Ratio TTM	16.3	0.83	0.85
P/C Ratio TTM	6.9	0.65	0.75
P/B Ratio TTM	2.2	0.78	0.80
Geo Avg Mkt Cap ₹mil	928363	0.78	1.05

Fixed-Income Style
Ltd Mod Ext
High Med Low

Avg Eff Maturity	—
Avg Eff Duration	—
Avg Wtd Coupon	—
Avg Wtd Price	—

Credit Quality Breakdown —	Bond %
AAA	—
AA	—
A	—
BBB	—
BB	—
B	—
Below B	—
NR	—

Regional Exposure	Stock %	Rel Std Index
Americas	0.0	—
Greater Europe	0.0	—
Greater Asia	100.0	1.00

Share Chg since 01-2015	Share Amount	Holdings: 70 Total Stocks , 0 Total Fixed-Income, 29% Turnover Ratio	% Net Assets
⊖	37 mil	State Bank of India	7.88
⊖	5 mil	Infosys Ltd	7.28
	26 mil	ICICI Bank Ltd	6.24
⊕	4 mil	Larsen & Toubro Ltd	5.30
	2 mil	Maruti Suzuki India Ltd	4.53
⊕	5 mil	HDFC Bank Ltd	3.95
	14 mil	Tata Motors Ltd Class A	3.78
	4 mil	Housing Development Finance Corp L	3.64
	5 mil	Reliance Industries Ltd	3.33
⊖	6 mil	Bharat Petroleum Corp Ltd	3.01
⊕	2 mil	Tata Consultancy Services Ltd	2.94
	21 mil	Bank of Baroda	2.68
	10 mil	ITC Ltd	2.62
	6 mil	Axis Bank Ltd	2.59
⊖	3 mil	Aurobindo Pharma Ltd	2.31

Sector Weightings	Stocks %	Rel Std Index
Cyclical	**50.4**	**1.02**
Basic Materials	4.4	0.52
Consumer Cyclical	11.4	1.11
Financial Services	34.4	1.14
Real Estate	0.1	0.31
Sensitive	**38.7**	**1.29**
Communication Services	2.6	1.23
Energy	9.4	1.32
Industrials	9.9	1.49
Technology	16.8	1.18
Defensive	**10.9**	**0.54**
Consumer Defensive	3.0	0.28
Healthcare	4.9	0.81
Utilities	3.0	0.88

Fees and Expenses

Sales Charges

Front-End Load %	**NA**
Deferred Load %	**1.00**

Fund Expenses

Management Fees %	0.93
Net Expense Ratio %	**2.24**

Risk and Return Profile

	3 Yr 258 funds	5 Yr 217 funds	10 Yr 100 funds
Morningstar Rating™	3★	3★	5★
Morningstar Risk	+Avg	High	Avg
Morningstar Return	Avg	+Avg	High

	3 Yr	5 Yr	10 Yr
Standard Deviation	18.43	18.99	24.46
Mean	19.39	13.28	20.68
Sharpe Ratio	0.65	0.40	0.65

MPT Statistics	Standard Index	Best Fit Index
Alpha	0.48	—
Beta	1.19	—
R-Squared	92.14	—
Potential Cap Gains Exp		—

Operations

Family:	HDFC Asset Management Company Limited	Base Currency:	INR	Purchase Constraints:	—
Manager:	Multiple	ISIN:	INF179K01BE2	Incept:	10-11-1996
Tenure:	11.8 Years	Minimum Initial Purchase:	₹5,000	Type:	MF
Objective:	—	Min Auto Investment Plan:	₹1,500	Total Assets:	₹142,854.64 mil

The Investment Detail report provides the performance, composition, fee and expense and risk information necessary to lead an intelligent discussion about adding or removing a specific investment from a client's portfolio.

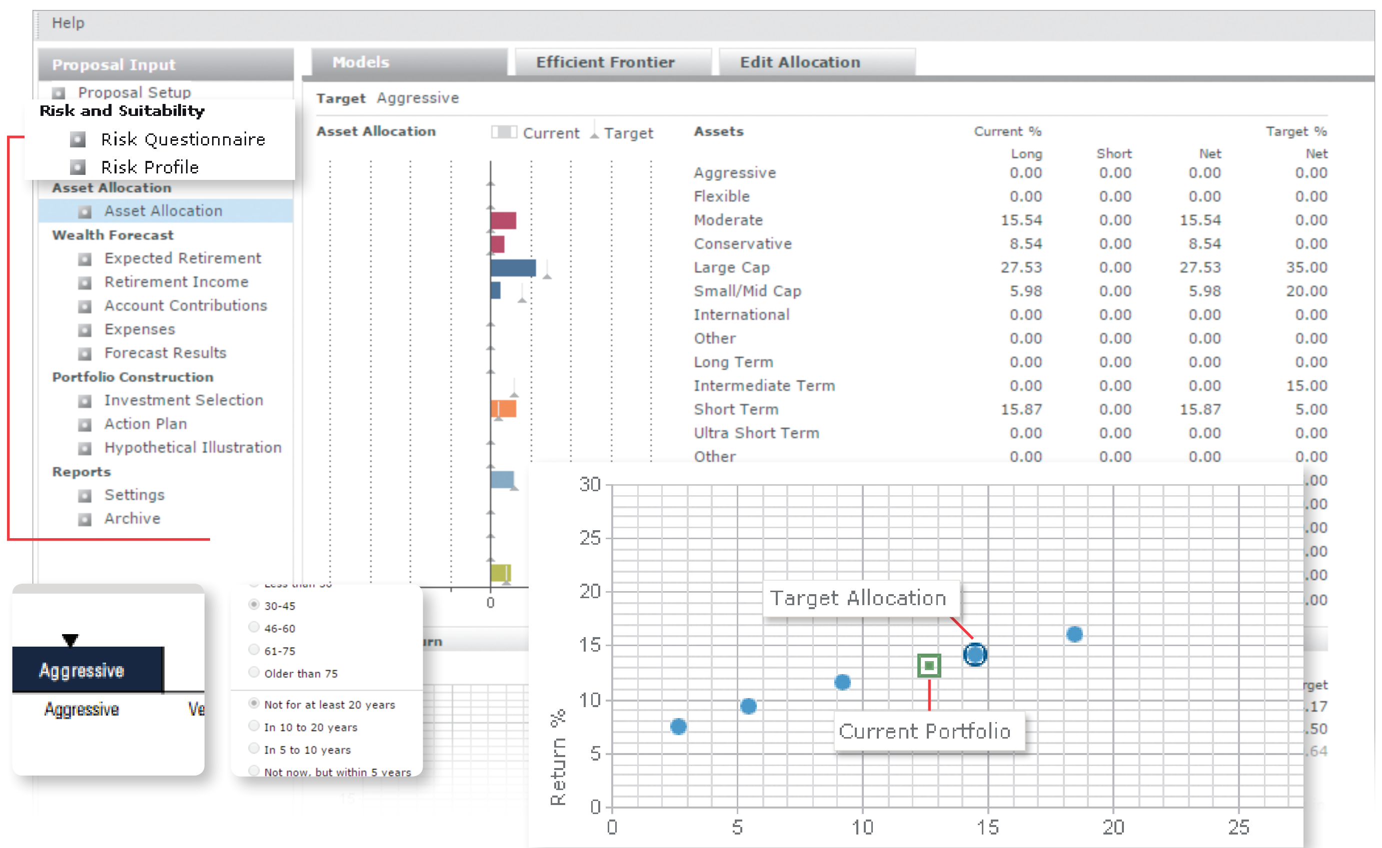
Planning Module

The Planning Module within Morningstar® Adviser Workstation™ helps you build solid, diversified portfolios that are appropriate for your clients by assessing their true risk tolerance and identifying their investment goals.

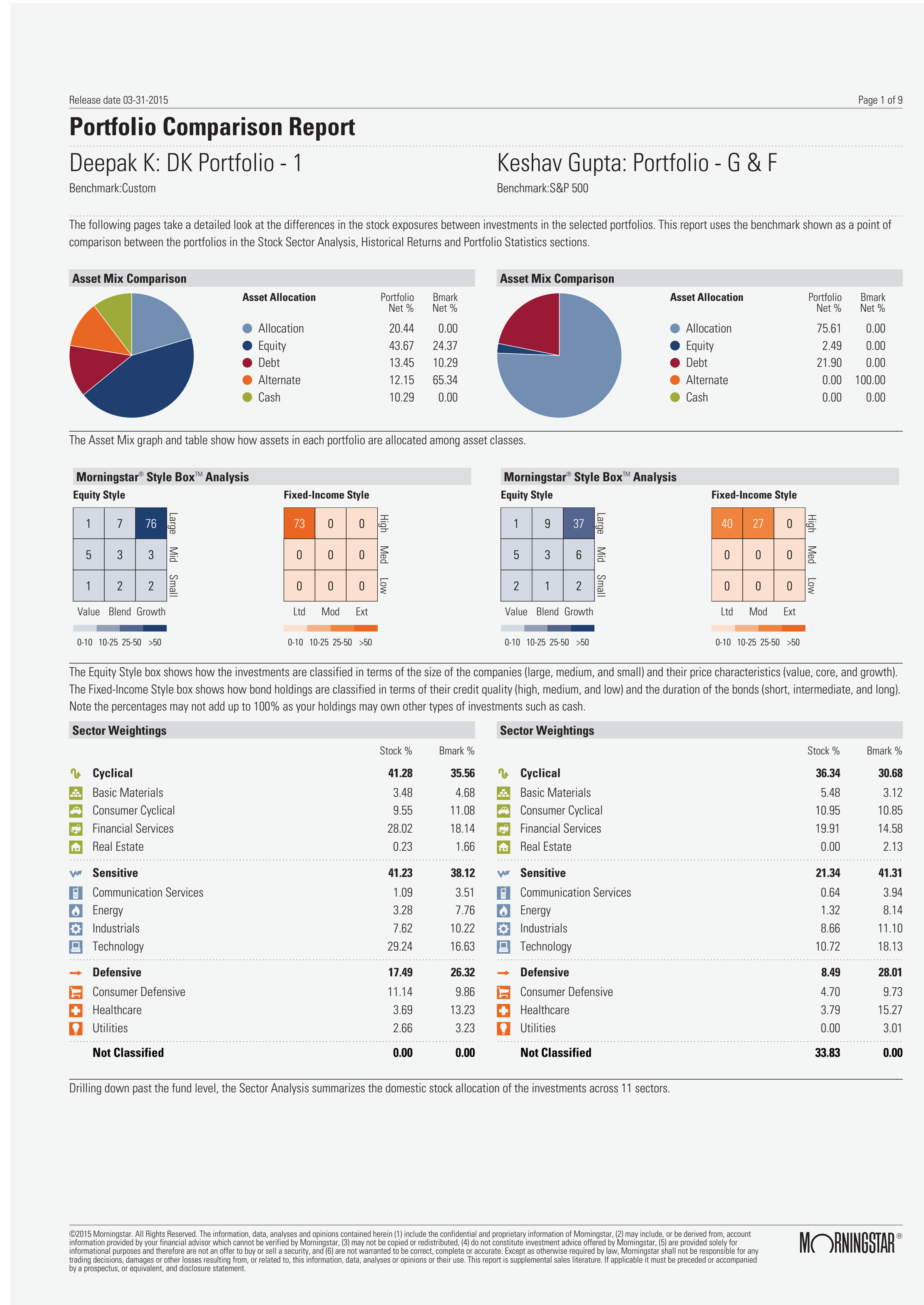
Use the Planning Module's risk questionnaire to conduct meaningful risk assessments and create accurate risk profiles. Then create a plan based on multiple investment goals and select a strategy and asset allocation along an Efficient Frontier curve. You can create wealth forecasts and illustrate the probability of success using sophisticated Monte Carlo simulations powered by the industry-renowned Ibbotson capital market assumptions.

Once the ideal allocation has been determined, build a portfolio to recommend specific securities for a client. Finish the process with an in-depth Investment Policy Statement or a convincing Portfolio Comparison report.

With the Planning Module, you'll have the tools to show clients how different strategies might succeed, and why your recommendations will get them closer to their goals.



The Efficient Frontier curve helps you select the optimal asset allocations for your clients, with the maximum expected return for any level of risk. You can specify the expected return and volatility of each asset class, as well as the correlation of the asset classes with each other, or opt for Morningstar's settings.



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Portfolio Comparison Report

Deepak K: DK Portfolio - 1
Benchmark:Custom

Keshav Gupta: Portfolio - G & F
Benchmark:S&P 500

The following pages take a detailed look at the differences in the stock exposures between investments in the selected portfolios. This report uses the benchmark shown as a point of comparison between the portfolios in the Stock Sector Analysis, Historical Returns and Portfolio Statistics sections.

Asset Mix Comparison (Deepak K: DK Portfolio - 1)

Asset Allocation	Portfolio Net %	Bmark Net %
Allocation	20.44	0.00
Equity	43.67	24.37
Debt	13.45	10.29
Alternate	12.15	65.34
Cash	10.29	0.00

Asset Mix Comparison (Keshav Gupta: Portfolio - G & F)

Asset Allocation	Portfolio Net %	Bmark Net %
Allocation	75.61	0.00
Equity	2.49	0.00
Debt	21.90	0.00
Alternate	0.00	100.00
Cash	0.00	0.00

The Asset Mix graph and table show how assets in each portfolio are allocated among asset classes.

Morningstar® Style Box™ Analysis (Deepak K: DK Portfolio - 1)

Equity Style

	Value	Blend	Growth
Large	1	7	76
Mid	5	3	3
Small	1	2	2

Fixed-Income Style

	Ltd	Mod	Ext
High	73	0	0
Med	0	0	0
Low	0	0	0

0-10 10-25 25-50 >50

Morningstar® Style Box™ Analysis (Keshav Gupta: Portfolio - G & F)

Equity Style

	Value	Blend	Growth
Large	1	9	37
Mid	5	3	6
Small	2	1	2

Fixed-Income Style

	Ltd	Mod	Ext
High	40	27	0
Med	0	0	0
Low	0	0	0

0-10 10-25 25-50 >50

The Equity Style box shows how the investments are classified in terms of the size of the companies (large, medium, and small) and their price characteristics (value, core, and growth). The Fixed-Income Style box shows how bond holdings are classified in terms of their credit quality (high, medium, and low) and the duration of the bonds (short, intermediate, and long). Note the percentages may not add up to 100% as your holdings may own other types of investments such as cash.

Sector Weightings (Deepak K: DK Portfolio - 1)

	Stock %	Bmark %
Cyclical	**41.28**	**35.56**
Basic Materials	3.48	4.68
Consumer Cyclical	9.55	11.08
Financial Services	28.02	18.14
Real Estate	0.23	1.66
Sensitive	**41.23**	**38.12**
Communication Services	1.09	3.51
Energy	3.28	7.76
Industrials	7.62	10.22
Technology	29.24	16.63
Defensive	**17.49**	**26.32**
Consumer Defensive	11.14	9.86
Healthcare	3.69	13.23
Utilities	2.66	3.23
Not Classified	**0.00**	**0.00**

Sector Weightings (Keshav Gupta: Portfolio - G & F)

	Stock %	Bmark %
Cyclical	**36.34**	**30.68**
Basic Materials	5.48	3.12
Consumer Cyclical	10.95	10.85
Financial Services	19.91	14.58
Real Estate	0.00	2.13
Sensitive	**21.34**	**41.31**
Communication Services	0.64	3.94
Energy	1.32	8.14
Industrials	8.66	11.10
Technology	10.72	18.13
Defensive	**8.49**	**28.01**
Consumer Defensive	4.70	9.73
Healthcare	3.79	15.27
Utilities	0.00	3.01
Not Classified	**33.83**	**0.00**

Drilling down past the fund level, the Sector Analysis summarizes the domestic stock allocation of the investments across 11 sectors.

The Portfolio Comparison report is an ideal way to contrast the differences between portfolios. It breaks down asset mixes, investment styles and overall stock sector exposure, making it an effective tool for conveying how a proposed portfolio is more appropriate than the current one.

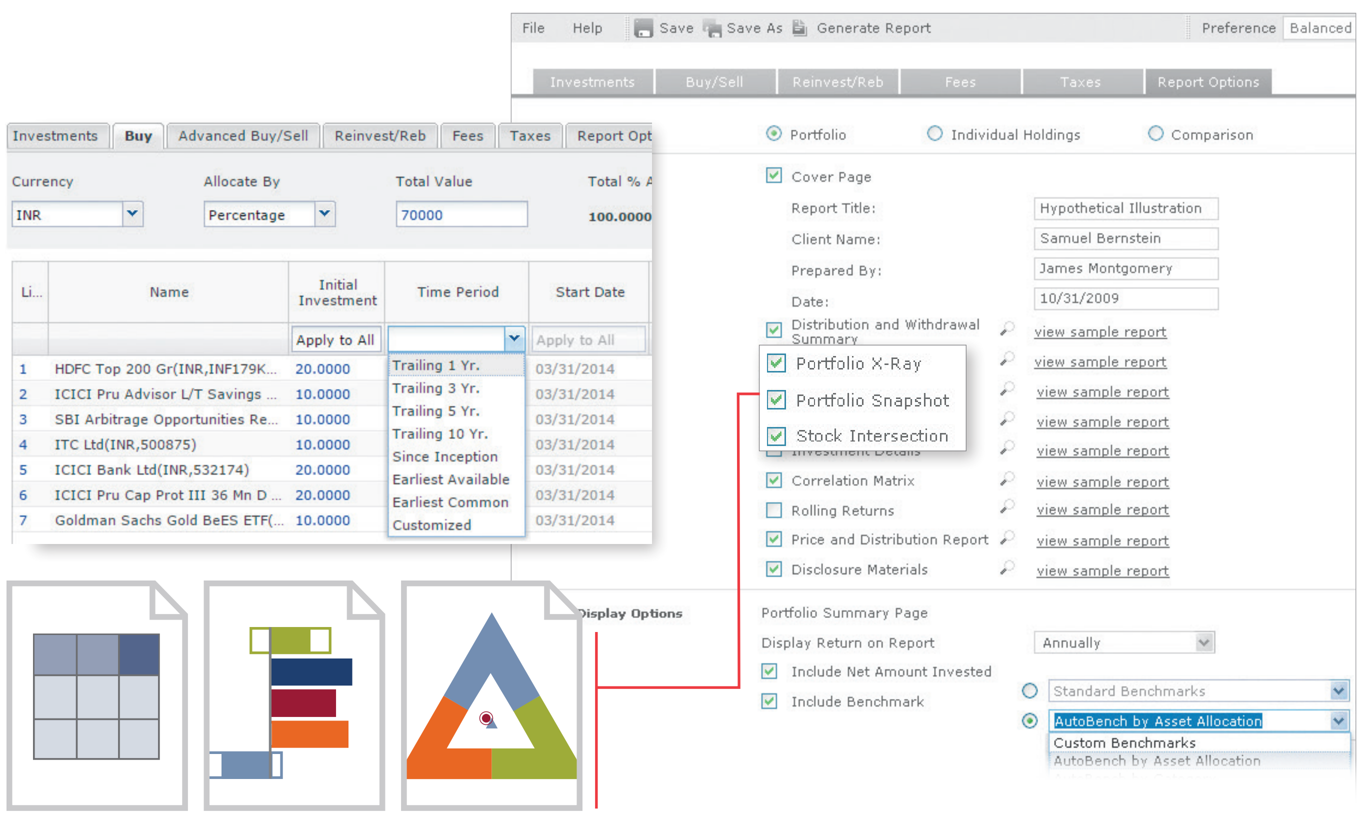
Hypotheticals Module

Grow your business by making the best possible case for your recommendations with persuasive sales illustrations.

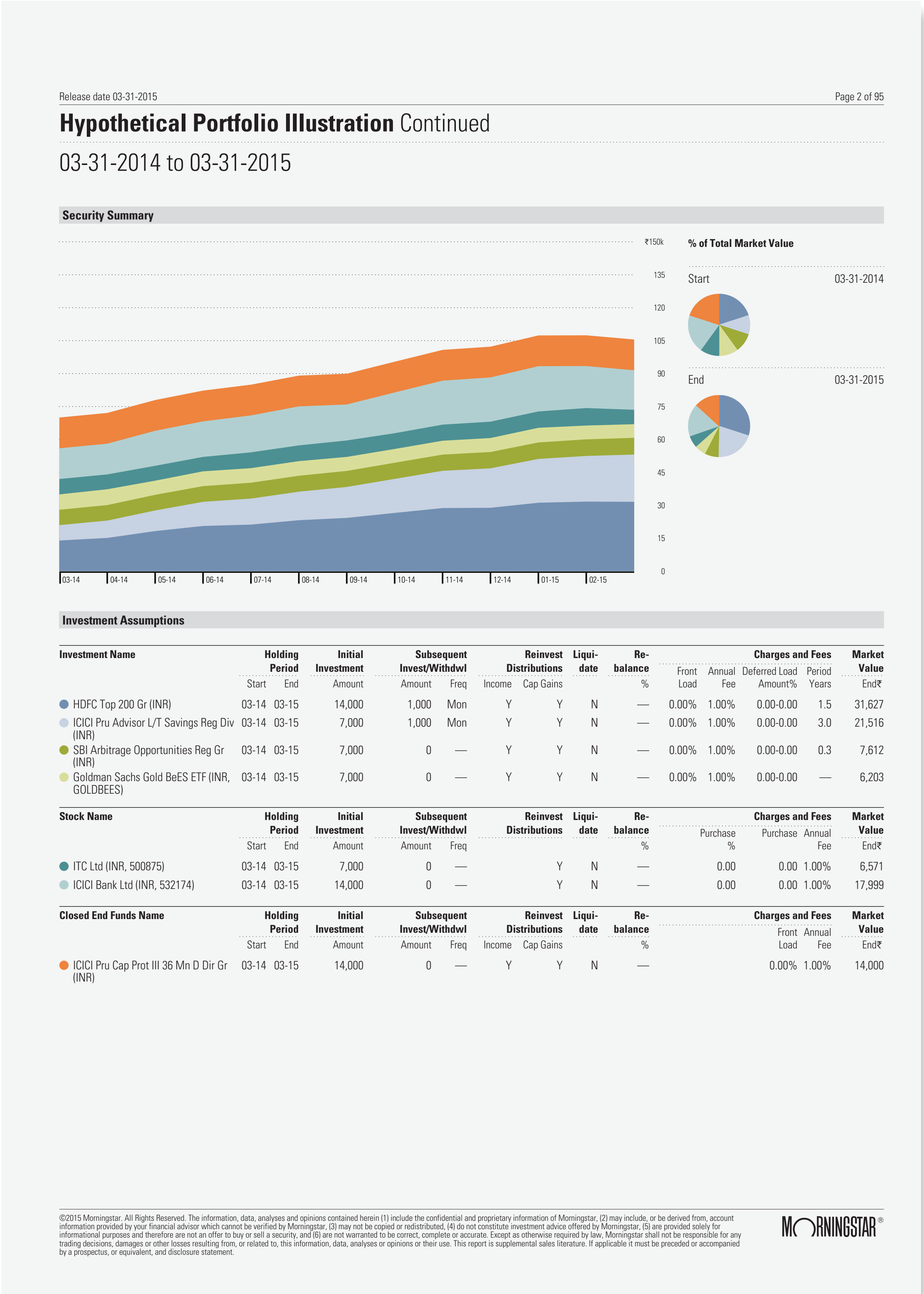
Trailing or annualised return numbers may reveal how a single lump-sum investment performed over time, but they don't necessarily reflect what investors actually experience. The Hypotheticals Module allows you to create vivid, real-world examples of the performance of a security by itself, in comparison with another security or within the context of an overall portfolio, for any of the securities in Morningstar® Adviser Workstation™.

The Hypothetical Illustration incorporates ongoing investments, withdrawals, reinvestment of dividends, taxes, investment fees (reflecting real breakpoints) and other charges to better illustrate the actual investor experience. Our hypothetical reports are the only ones in the industry to incorporate underlying holdings to show performance with relevant asset allocation, sector weightings and style diversification information. Best of all, you can produce illustrations quickly with an intuitive wizard. All reports are generated as PDFs for easy printing and sharing.

The Hypotheticals Module helps you turn complicated investment information into clear, actionable insight. There's simply no better way to make the case for how your recommendations would have affected a client's wealth.



After you choose one or more securities, the Reports Options tab lets you generate illustrations with the specific graphs and reports you want to share with your clients. You can create reports for individual securities, comparison reports that contrast the performance of two or more securities, and portfolio reports.



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Hypothetical Portfolio Illustration Continued

03-31-2014 to 03-31-2015

Security Summary

Investment Assumptions

Investment Name	Holding Period Start	Holding Period End	Initial Investment Amount	Subsequent Invest/Withdwl Amount	Subsequent Invest/Withdwl Freq	Reinvest Distributions Income	Reinvest Distributions Cap Gains	Liquidate	Rebalance %	Front Load	Annual Fee	Deferred Load Amount%	Period Years	Market Value End₹
HDFC Top 200 Gr (INR)	03-14	03-15	14,000	1,000	Mon	Y	Y	N	—	0.00%	1.00%	0.00-0.00	1.5	31,627
ICICI Pru Advisor L/T Savings Reg Div (INR)	03-14	03-15	7,000	1,000	Mon	Y	Y	N	—	0.00%	1.00%	0.00-0.00	3.0	21,516
SBI Arbitrage Opportunities Reg Gr (INR)	03-14	03-15	7,000	0	—	Y	Y	N	—	0.00%	1.00%	0.00-0.00	0.3	7,612
Goldman Sachs Gold BeES ETF (INR, GOLDBEES)	03-14	03-15	7,000	0	—	Y	Y	N	—	0.00%	1.00%	0.00-0.00	—	6,203

Stock Name	Holding Period Start	Holding Period End	Initial Investment Amount	Subsequent Invest/Withdwl Amount	Subsequent Invest/Withdwl Freq	Reinvest Distributions	Liquidate	Rebalance %	Purchase %	Purchase	Annual Fee	Market Value End₹
ITC Ltd (INR, 500875)	03-14	03-15	7,000	0	—	Y	N	—	0.00	0.00	1.00%	6,571
ICICI Bank Ltd (INR, 532174)	03-14	03-15	14,000	0	—	Y	N	—	0.00	0.00	1.00%	17,999

Closed End Funds Name	Holding Period Start	Holding Period End	Initial Investment Amount	Subsequent Invest/Withdwl Amount	Subsequent Invest/Withdwl Freq	Reinvest Distributions Income	Reinvest Distributions Cap Gains	Liquidate	Rebalance %	Front Load	Annual Fee	Market Value End₹
ICICI Pru Cap Prot III 36 Mn D Dir Gr (INR)	03-14	03-15	14,000	0	—	Y	Y	N	—	0.00%	1.00%	14,000

The Hypothetical Portfolio Illustration reveals how a portfolio would have performed in the past. You can specify the investment schedule, withdrawals, reinvestment of distributions, tax rates and fees to present the most accurate real-world portrayal of portfolio performance.

Analyst Research Center

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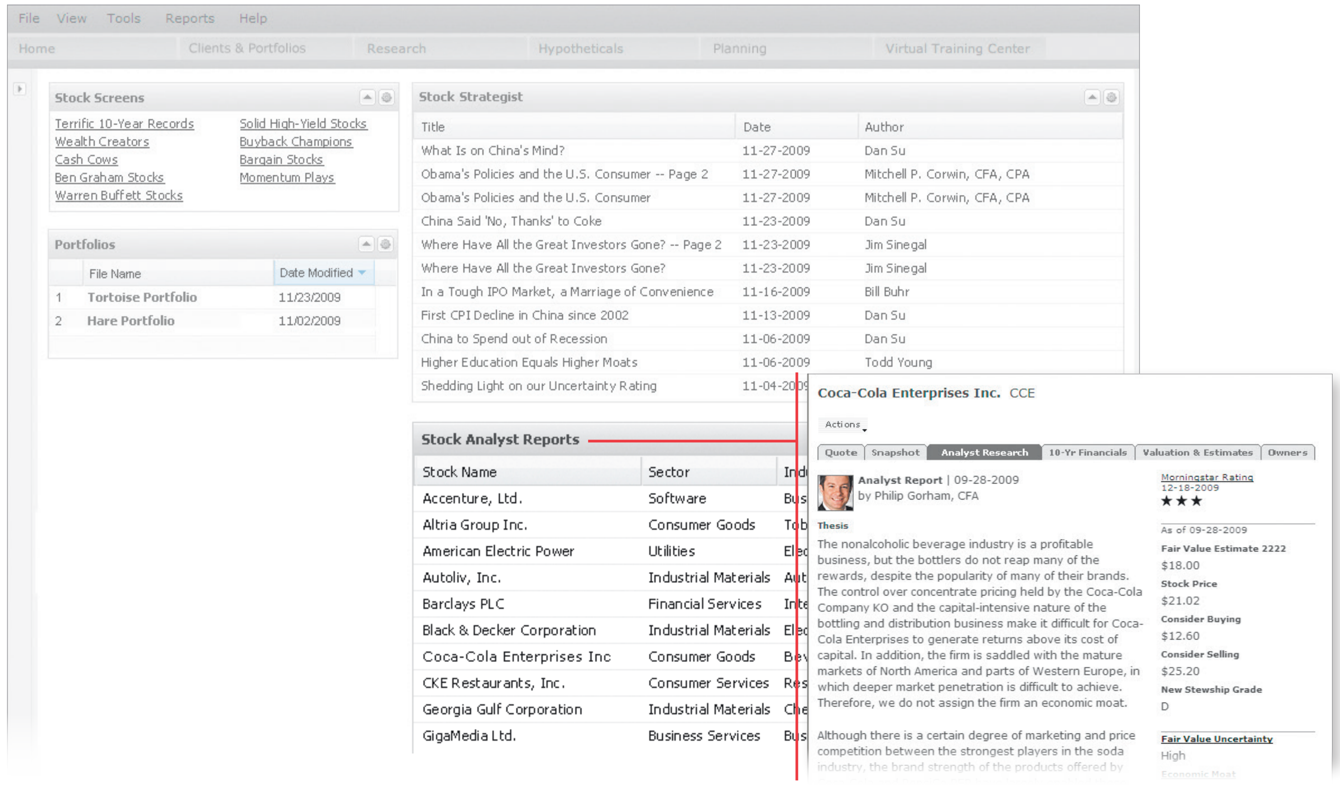
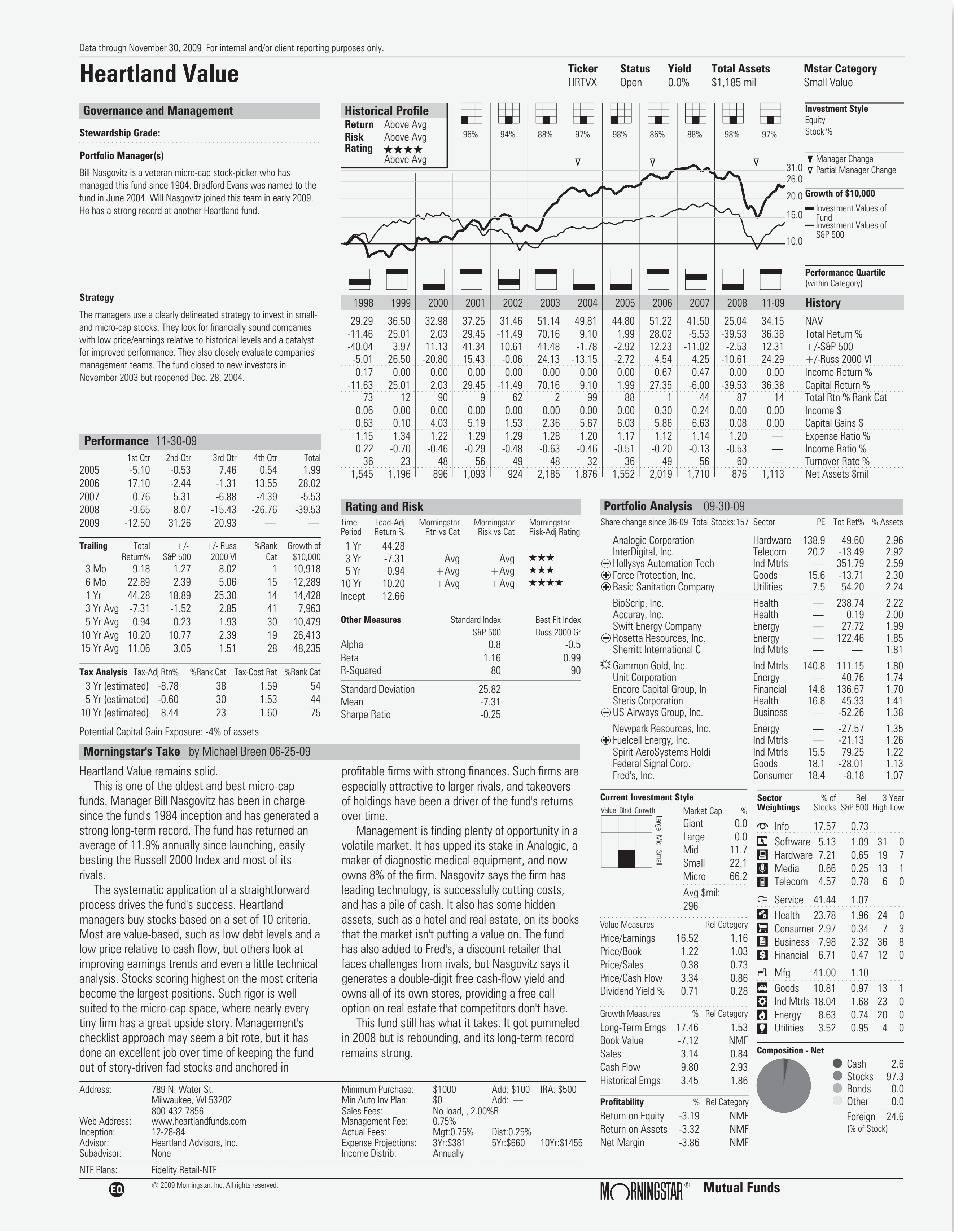


The Analyst Research Center serves as a launching pad for Morningstar analyst insight. The video library features the analyst team's views on a wide variety of investment topics, and the current and archived analyses for all of the securities tracked by the analyst team are also available here.



Analyst insight is also available via PDF versions of the classic "Morningstar page," providing a rich, single-page summary of the most important information about a mutual fund, stock or exchange-traded fund.

Training and Support

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Notes

Notes

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