

Aditya Birla Sun Life Mutual Fund Launches

Aditya Birla Sun Life Quant Fund: Powered By Tech, Guided By Wisdom

***The NFO will be open for subscription from June 10th to June 24th, 2024
It is an open-ended equity scheme following Quant-based investment theme***

Mumbai, June 10, 2024: Aditya Birla Sun Life AMC Limited (ABSLAMC) was incorporated in the year 1994. Aditya Birla Capital Limited and Sun Life (India) AMC Investments Inc. are the promoters and major shareholders of the Company. ABSLAMC is primarily the investment manager of Aditya Birla Sun Life Mutual Fund, a registered trust under the Indian Trusts Act, 1882. The asset manager has announced the launch of **Aditya Birla Sun Life Quant Fund**, an open-ended equity scheme following Quant-based investment theme. **The New Fund Offer (NFO) will remain open from June 10th to June 24th, 2024.**

The fund's investment strategy is built around a proprietary quantitative model that aims to capture the best of both world's by involving man and machine. Quant investing is unaffected by greed & fear and is therefore, an emotion free investment approach. Model based investing not only provides greater flexibility & repeatability but also maintains discipline by pre-defining the entry and exit points. It also enhances the transparency since every decision is rule based and offers better risk management with both man and machine monitoring the portfolio.

Commenting on the new fund launch, **A. Balasubramanian, Managing Director & CEO, Aditya Birla Sun Life AMC Ltd, said,** *"In today's complex markets, we believe quantitative investment strategies can offer valuable advantages such as improved transparency, emotion-free decision making and robust risk management. The quant fund aims to leverage the combined strengths of human expertise and quantitative models to provide investors with a differentiated investment solution. The Aditya Birla Sun Life Quant Fund, will deliver these benefits to investors through a rigorous, research-driven approach for an innovative investment process powered by tech and guided by wisdom."*

Commenting on this unique fund offering, **Harish Krishnan, Co-CIO and Head Equity, Aditya Birla Sun Life AMC Ltd., said,** *"this is the first such offering from our fund house, we will start by narrowing the universe of stocks such that they fall in the large and midcap category. Next, we will evaluate the quality of stocks based on their fundamental track record. Post this, we will look at the relative returns generated in the last 6 months of this universe and then look at the composite score assigned by various sell-side analysts. Ultimately, we will arrive at a portfolio comprising of 40-50 stocks by first applying equal weight to all and then skew the weight of individual stocks basis low volatility."*

[Click Here To Know More About Aditya Birla Sun Life Quant Fund](#)

Press Release

Aditya Birla Sun Life
AMC Ltd.



About Aditya Birla Sun Life AMC Limited

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ABSLAMC is primarily the investment manager of Aditya Birla Sun Life Mutual Fund, a registered trust under the Indian Trusts Act, 1882. ABSLAMC also operates multiple alternate strategies including Portfolio Management Services, Real Estate Investments and Alternative Investment Funds. ABSLAMC is one of the leading asset managers in India, servicing around 8.59 million investor folios with a pan India presence across 290 plus locations and overall AUM of Rs. 3,458 billion for the quarter ending March 31, 2024 under its suite of Mutual Fund (excluding domestic FoFs), Portfolio Management Services, Alternative Investment Funds, Offshore and Real Estate offerings.

About Aditya Birla Capital Limited

Aditya Birla Capital Limited ("ABCL") is the holding company for the financial services businesses of the Aditya Birla Group. Through its subsidiaries/JVs, ABCL provides a comprehensive suite of financial solutions across Loans, Investments, Insurance, and Payments to serve the diverse needs of customers across their lifecycle. Powered by about 47,000 employees, the businesses of ABCL have a nationwide reach with over 1,474 branches and more than 200,000 agents/channel partners along with several bank partners. As of March 31, 2024, Aditya Birla Capital Limited manages aggregate assets under management of Rs. 4.36 Lakh Crore with a consolidated lending book of Rs 1.24 Lakh Crore through its subsidiaries/JVs. Aditya Birla Capital Limited is a part of the US\$65 billion global conglomerate Aditya Birla Group, which is in the league of Fortune 500. Anchored by an extraordinary force of over 187,000 employees belonging to 100 nationalities, the Group is built on a strong foundation of stakeholder value creation. With over seven decades of responsible business practices, the Group's businesses have grown into global powerhouses in a wide range of sectors - from metals to cement, fashion to financial services and textiles to trading. Today, over 50% of the Group's revenues flow from overseas operations that span over 40 countries in North and South America, Africa, Asia, and Europe.

About Sun Life

Sun Life is a leading international financial services organization providing asset management, wealth, insurance and health solutions to individual and institutional Clients. Sun Life has operations in a number of markets worldwide, including Canada, the United States, the United Kingdom, Ireland, Hong Kong, the Philippines, Japan, Indonesia, India, China, Australia, Singapore, Vietnam, Malaysia and Bermuda. As of Mar 31, 2024, Sun Life had total assets under management of \$1.47 trillion. For more information, please visit www.sunlife.com. Sun Life Financial Inc. trades on the Toronto (TSX), New York (NYSE) and Philippine (PSE) stock exchanges under the ticker symbol SLF.

For media queries please connect with:

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

Aditya Birla Sun Life Quant Fund

(An open ended equity scheme following Quant based investment theme)

<p>This product is suitable for investors who are seeking*:</p>	<p>Scheme Riskometer</p>	<p>Benchmark Riskometer NIFTY 200 TRI</p>
<ul style="list-style-type: none"> • Long Term Capital Appreciation • Investment in equity and equity related instruments selected based on quant model 	 <p>RISKOMETER</p> <p>Investors understand that their principal will be at Very High risk</p>	 <p>RISKOMETER</p> <p>Investors understand that their principal will be at Very High risk</p>
<p>*Investors should consult their financial advisors if in doubt whether the product is suitable for them.</p>		

The product labelling assigned during the NFO is based on internal assessment of the Scheme characteristics or model portfolio and the same may vary post NFO when the actual investments are made.