

INVESTING in high-quality socially responsible companies can help you make money responsibly!



Aditya Birla Sun Life ESG Fund

An open-ended equity scheme investing in companies following Environment, Social & Governance (ESG) theme.

NFO opens: December 04, 2020

NFO closes: December 18, 2020

Disclaimer: The globe shown here is not an actual globe and is shown for illustration purpose only.

Mutual Funds

Aditya Birla Sun Life Mutual Fund



**ADITYA BIRLA
CAPITAL**

1800-270-7000

What is ESG?

It stands for...



ESG lens enables to look beyond the traditional investment parameters to identify high quality socially responsible companies for investing. ESG investing shifts focus from **“How profitable a business is”** to **“How does the business earn its profits”**.

Pillars of ESG

Environmental - factors impacting the planet	Social - factors impacting lives of people	Governance - factors relating to management of companies
<ul style="list-style-type: none">• Carbon Emissions• Climate Change• Energy Efficiency• Water & Waste Management• Biodiversity• Deforestation	<ul style="list-style-type: none">• Data Protection & Privacy• Customer Satisfaction• Labour Management• Gender Diversity• Community Relations• Human Rights• Health & Safety	<ul style="list-style-type: none">• Board Composition• Ownership• Executive Remuneration• Bribery and Corruption• Whistleblower Scheme• Audit Committee Structure

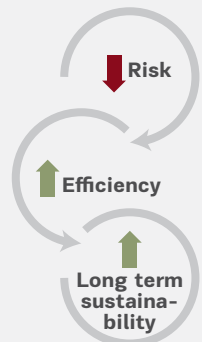
Directionally the world is moving towards Responsible Investing

- Flows into ESG focused sectors/companies are consistently rising
- Regulations related to ESG factors are becoming stringent and non-compliant companies are being punished
- Emerging companies/trends are more aligned to ESG factors. E.g. renewable energy technologies, electric vehicles, clean tech, etc.
- Existing companies are looking to integrate ESG to improve sustainability

ESG integration in Business helps improve sustainability

- Encourages efficient usage of resources
- Enhances ability to attract and retain talent
- Reduces regulatory and reputational risks
- Improves customer satisfaction and increases brand loyalty
- Improves ability to raise capital at lower cost

With increasing awareness, all stakeholders are focusing on integrating ESG factors in business!



HOW DOES ESG INVESTING ADD VALUE TO INVESTORS?

ESG Investing Complements Traditional Investing



How does Sustainable & Responsible investing help investors?

- 1) Helps invest in a responsible manner
- 2) Helps avoid risky companies & identify Sustainable Companies
- 3) Improves risk adjusted return potential

Invest responsibly through **Aditya Birla Sun Life ESG Fund** (An open-ended equity scheme investing in companies following Environment, Social & Governance (ESG) theme)

Fund Positioning

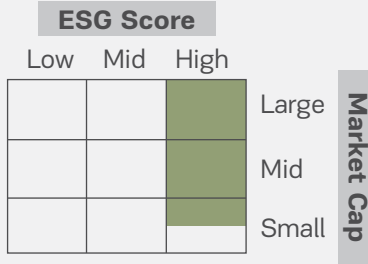
- An **open ended thematic equity scheme** investing in companies following ESG theme.
- **Market cap agnostic** portfolio with **60%-80% in Large Cap** and remaining in Mid & Small Cap
- Fund can invest in **foreign securities of up to 35%** of the **portfolio**
- **“True to Label” – Portfolio exclusion to non-conforming sectors.**

Investment Approach

- **Focused Portfolio** - 40-50 stocks portfolio with high active share
- **Fundamental Research Driven** - Blend of top down & bottom up approach for portfolio construction
- **Sustainable Growth Orientation** - Portfolio will focus on ESG compliant companies with high growth potential



“True to Label”



Why Invest in Aditya Birla Sun Life ESG Fund?

- ESG concept is at a very **nascent stage** in India and is **widely unexplored**, while it’s a **very established theme globally**
- **Strong fund flows into ESG compliant companies increases possibility of re-rating** and augurs well for longer term market performance
- ESG compliant companies usually have **sustainable business model**, witness **sustainable growth** and tend to be **Quality Compounders**
- Fund endeavours to **participate in ESG aligned emerging opportunities**, **eliminate risky businesses and invest in sustainable companies** with an aim to **generate better risk adjusted returns**

Who should invest?

The fund is suitable for Long-term Equity Investors with an investment horizon of 5 years and above.

We offer a wide range of Mutual Fund solutions to cater to your specific investing needs.

To know more about the various solutions, please contact our advisor or visit our website adityabirlasunlifemf.com

Savings

Regular
Income

Tax
Saving

Wealth



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Scheme:	This product is suitable for investors who are seeking*:	
Aditya Birla Sun Life ESG Fund (An open-ended equity scheme investing in companies following Environment, Social & Governance (ESG) theme).	<ul style="list-style-type: none"> • Long term capital appreciation • An equity scheme that invests in companies following the Environment, Social & Governance (ESG) theme <p>*Investors should consult their financial advisors, if in doubt whether the product is suitable for them.</p>	<p>RISKOMETER Investors understand that their principal will be at High risk</p>

