



INVESTING in a balanced manner
can help you approach the future
with confidence.

Aditya Birla Sun Life Balanced Advantage Fund

An open ended Dynamic Asset Allocation fund

Mutual Funds

Aditya Birla Sun Life Mutual Fund



**ADITYA BIRLA
CAPITAL**

1800-270-7000

A hybrid, all-season fund that allocates investments dynamically across equity and fixed income securities to manage volatility across market cycles while aiming to generate wealth.

Life calls for a balanced approach. Nature requires rain as much as it does the sunlight. Even our professional lives are balanced by our personal aspirations.

Similarly, in order to make the most out of your investments, you need to adopt a balanced approach accompanied by right planning, strategy and foresightedness.

By balancing the risk associated with Equity funds with the consistent returns of the debt funds, you can meet your objective of wealth creation easily.

Aditya Birla Sun Life Balanced Advantage Fund (an open-ended asset allocation scheme) It dynamically allocates between Equity and Debt instruments. This is primarily achieved by a combination of quality stock selection and active portfolio rebalancing.

Features of Aditya Birla Sun Life Balanced Advantage Fund



PRACTICAL APPROACH INVESTMENT

‘Buy low, sell high’ – Takes advantage of high risk investments when the stock prices are low and vice versa.

Equity allocation is based on trailing P/E ratio of S&P BSE 100 index and other ratios like P/B, Dividend Yield etc.



INVESTMENT STRATEGY

- Conservative stock selection approach to keep reasonable margin of safety at the time of investment
- Reduces risk of adverse price movements through hedging
- Multi-cap investment across sectors
- Active re-balancing of portfolio.

Why Aditya Birla Sun Life Balanced Advantage Fund?



Participates in growing stocks and limits investments in low yield stocks



EQUITY TAXATION

Invests in both equity and debt asset classes, but seeks to maintain gross equity exposure over 65%.



INCOME DISTRIBUTION CUM CAPITAL WITHDRAWAL (IDCW)

Endeavours to declare IDCW under IDCW option, subject to availability of distributable surplus.



SMART WITHDRAWAL FACILITY

It allows the investors to receive income at fixed intervals.

The benefits of this facility are:

- Regular cash flow
- Tax efficient withdrawal
- No TDS

For more information about this facility, please refer the SID.

PRODUCT DETAILS & STRUCTURE

Investment Objective

The primary objective of the Scheme is to generate long term growth of capital and income distribution with relatively lower volatility by investing in a dynamically balanced portfolio of Equity & Equity linked investments and fixed-income securities. There can be no assurance that the investment objective of the Scheme will be realized.

Types of Plans/Duration

Regular Plan - Growth

Regular Plan - IDCW (Payout, Reinvestment)

Direct Plan - Growth

Direct Plan - IDCW (Payout, Reinvestment)

Load Structure

Entry load - NIL

Exit Load - NIL

Benchmark

CRISIL Hybrid 50+50 Moderate TRI

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 Balanced Advantage Fund (An open ended Dynamic Asset Allocation fund)	<ul style="list-style-type: none">• Capital appreciation and regular income in the long term• Investment in equity & equity related securities as well as fixed income securities (Debt & Money Market securities) <p>*Investors should consult their financial advisors, if in doubt about whether the product is suitable for them.</p>	<p>LOW RISKOMETER HIGH</p> <p>Investors understand that their principal will be at Moderately high risk</p>

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