

Aditya Birla Sun Life
Mutual Fund



MUTUAL FUNDS



Navigate
market dynamics with a
Balanced Strategy

Presenting

Aditya Birla Sun Life

Balanced Advantage Fund

(An open-ended Dynamic Asset Allocation Fund)

The fund dynamically balances its portfolio between equity and fixed income securities based on valuation levels to mitigate market volatility.

MUTUAL FUNDS

Asset Class Range



EQUITY

The fund follows a combination of top-down and bottom-up approach, maintaining a large cap bias with opportunistic exposure to mid/small cap companies.



FIXED INCOME

It has a good mix of accrual and duration strategy, akin to a short-term fund, and takes quality portfolio calls basis duration and credit movements.



ARBITRAGE

The fund has derivative exposure to broader indices, calibrating the risk of volatility that may arise from high equity position.

Key Reasons to Invest in Aditya Birla Sun Life Balanced Advantage Fund



NO NEED TO TIME THE EQUITY MARKET:

In constantly evolving scenarios, it is important to have balanced asset allocation and stay invested.

WELL-BALANCED RISK-REWARD PROPOSITION:

It has delivered lower drawdowns across market cycles compared to the broader index while achieving a faster recovery.



ACTIVELY MANAGED EQUITY PORTFOLIO:

Enhances return potential with an investment horizon of 3 years or more.

RULE BASED INVESTING

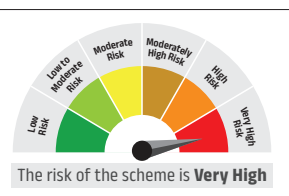
It adjusts equity allocation based on valuation, contrarian signals, and trends; debt follows accrual strategy.



The fund is suitable for Long-Term Equity Investors with an investment horizon of 3 years and above.



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 whether the product is suitable for them.</p>



Scan to Invest

Risk-O-Meter as on February 28, 2025.

The scheme type and Risk-O-Meter(s) specified will be evaluated and updated on a monthly basis. For updated scheme type and Risk-O-Meters kindly refer to the latest factsheet.