

Aditya Birla Sun Life Mutual Fund Launches

An Industry & Category-First Fund: **Aditya Birla Sun Life Conglomerate Fund**

The fund will invest in companies of top conglomerates in India

The NFO will be open for subscription from 5th December 2024 to 19th December 2024

Mumbai, December 05, 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 Conglomerate Fund**, an open-ended diversified equity fund scheme following conglomerate theme. **The New Fund Offer (NFO) will remain open from 5th December 2024 to 19th December 2024.**

The **Industry & Category First** fund will invest in groups domiciled in India, led by visionary promoters, with at least two listed companies across different sectors. The invested companies are characterized by their diversified business operations across multiple sectors, strong market positions and the ability to generate sustainable cash flows. Conglomerates are vast, multi-generational enterprises that wield significant influence over the daily lives of billions of people. These corporations have cultivated long-standing relationships with customers, fostering trust and loyalty over decades. Their success often lies in their ability to adapt and innovate, strategically investing in emerging, high-growth industries, often referred to as sunrise sectors. By doing so, conglomerates not only sustain their market relevance but also help shape the future of global business and consumer trends.

Commenting on the new fund launch, **A. Balasubramanian, Managing Director & CEO, Aditya Birla Sun Life AMC Ltd, said, "In India, conglomerates have played a pivotal role in driving the nation's industrial revolution, forming the backbone of its economic progress. Defined by resilience, multi-generational legacies, and a remarkable capacity for innovation across diverse industries, these businesses have consistently adapted to market cycles, created diversified cash flows, and spearheaded investments in emerging sectors like green energy and digital ecosystems. The Aditya Birla Sun Life Conglomerate Fund offers investors a unique opportunity to harness the growth potential of these enduring enterprises, aligning with their robust performance and strategic foresight to build wealth in a dynamic economy."**

This offers a unique investment opportunity across 169 companies in 22 sectors, representing 33% of the total BSE market cap. The fund includes a diverse mix of 36 large-cap, 30 mid-cap, and 103 small-cap stocks, providing broad growth potential and sectoral diversity for investors.

[Click Here To Know More About Aditya Birla Sun Life Conglomerate 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 10.2 million investor folios with a pan India presence across 300+ locations and overall AUM of Rs. 4,004 billion for the quarter ending September 30, 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 over 55,000 employees, the businesses of ABCL have a nationwide reach with over 1,470 branches and more than 200,000 agents/channel partners along with several bank partners.

As of September 30, 2024, Aditya Birla Capital Limited manages aggregate assets under management of over Rs. 5.0 Lakh Crore with a consolidated lending book of Rs 1.38 Lakh Crore through its subsidiaries/JVs.

Aditya Birla Capital Limited is a part of the US\$66 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 Sep 30, 2024, Sun Life had total assets under management of \$1.51 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.

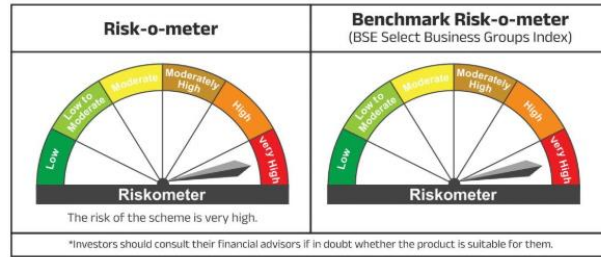
Press Release

Aditya Birla Sun Life
AMC Ltd.



Aditya Birla Sun Life Conglomerate Fund

Scheme Name
Aditya Birla Sun Life Conglomerate Fund (An open-ended diversified equity scheme following conglomerate theme)
This product is suitable for investors who are seeking*:
<ul style="list-style-type: none"> • Long term Capital Appreciation • Investment in equity and equity related instruments of companies that follow Conglomerate theme.



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.