

Press Release



Aditya Birla Sun Life AMC Launches Apex Hybrid Long-Short Fund Under the New SIF Framework

***The NFO will be open for subscription from 6th March 2026 to 18th March 2026
The strategy will combine equity, debt and derivatives to pursue superior risk-adjusted
returns across market cycles***

Mumbai, March 6, 2026: 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 its first investment strategy under the newly introduced Specialized Investment Funds (SIF) category - **Apex Hybrid Long-Short Fund**. The New Fund Offer (NFO) will be open for subscription from **6th March 2026 to 18th March 2026**.

The Apex Hybrid Long-Short Fund is structured as a differentiated investment solution for investors seeking differentiated portfolio strategies with a minimum investment of Rs 10 lakh, positioned strategically between traditional mutual funds and higher ticket offerings such as Portfolio Management Services (PMS) and Alternative Investment Funds (AIFs). Launched under the Specialized Investment Fund (SIF) framework, the strategy will combine equity, debt and derivatives to pursuit of superior risk-adjusted returns across market cycles. It employs advanced risk management by utilising a long-short approach which allows the fund to hedge downside risks and navigate volatile market dynamics more effectively than traditional long-only funds. Beyond core equities, the fund seeks to capture tactical alpha through special situations with opportunities arising from corporate actions. Furthermore, the fund is structured to provide equity-like taxation benefits for investors, where long-term capital gains for a holding period of more than 12 months are taxed at 12.5% plus applicable surcharge and cess.

Commenting on the launch, **A. Balasubramanian, Managing Director & CEO, Aditya Birla Sun Life AMC Ltd.,** said, *“With the launch of the Apex Hybrid Long-Short Fund, we are expanding our toolkit for investors who seek sophisticated wealth creation strategies. In an evolving market environment, this SIF offering allows us to use advanced derivative strategies and limited shorting to manage volatility while aiming for superior risk-adjusted returns. With the positioning being between a balanced advantage fund and equity savings scheme, it is a suitable fit for investors seeking a more flexible, risk-aware approach across market cycles, especially between retail mutual funds and private wealth products.”*

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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 10.8 million investor folios with a pan India presence across 310+ locations and overall AUM of Rs. 4,814 billion for the quarter ending December 31, 2025 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 a listed systemically important non-deposit taking Non-Banking Financial Company (NBFC) and the holding company of the financial services businesses. ABCL and its subsidiaries/JVs provides a comprehensive suite of financial solutions across Loans, Investments, Insurance, and Payments to serve the diverse needs of customers across their lifecycles. Powered by over 66,000 employees, the businesses of ABCL have a nationwide reach with over 1,742 branches and more than 200,000 agents/channel partners along with several bank partners.

ABCL and its subsidiaries/JVs manage aggregate assets under management of about 6 Lakh Crore with a consolidated lending book of over Rs 1.90 Lakh Crore as of December 31, 2025.

Aditya Birla Capital Limited is a part of the US\$67 billion global conglomerate Aditya Birla Group, which is in the league of Fortune 500. and has a consolidated market cap of over US\$117 billion, as of Jan 1, 2026. Anchored by an extraordinary force of over 227,500 employees, 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 40% of the Group revenues flow from overseas operations that span 41 countries across six continents with over 340 state-of-the-art manufacturing units.

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 December 31, 2025, Sun Life had total assets under management of \$1.60 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.

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