

## **Aditya Birla Sun Life Mutual Fund Launches Twin Factor-Based Index Funds Focusing On Momentum & Quality**

***The NFOs will be open for subscription from 21<sup>st</sup> July 2025 to 4<sup>th</sup> August 2025  
Momentum will aim to focus on top performers, while Quality aims for consistency through  
stable earnings***

**Mumbai, July 21, 2025:** 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 two new factor-based index funds - **Aditya Birla Sun Life BSE 500 Momentum 50 Index Fund** and **Aditya Birla Sun Life BSE 500 Quality 50 Index Fund**. The New Fund Offers (NFO) will remain open for subscription from 21<sup>st</sup> July 2025 to 4<sup>th</sup> August 2025.

These launches mark a strategic extension of the asset manager's passive investment offerings, providing retail investors with access to differentiated equity strategies anchored in quantitative and rule-based index construction. The BSE 500 Momentum 50 Index Fund aims to capture the market's upward momentum by investing in 50 high-performing stocks from the BSE 500 universe, dynamically adjusted each quarter. It's designed for investors with higher risk appetite looking to maximize upside capture in trending markets. It benefits from exposure to top performing stocks and sectors, and stocks with a proven return record over a 12-month horizon. In contrast, the BSE 500 Quality 50 Index Fund focuses on financially sound and stable companies with high return on equity, low financial leverage, and low accruals ratio. It is tailored for investors seeking long-term wealth creation through investments in high quality names with stable balance sheet and lower volatility in earnings. These stocks tend to perform better during market downturns and provide good upside in recovery phases.

Commenting on the twin fund launch, **A. Balasubramanian, Managing Director & CEO, Aditya Birla Sun Life AMC Ltd., said,** *"These twin fund launches are aimed at enabling investors to diversify their core equity portfolios with factor-based strategies that have proven performance across market cycles. While the Momentum Index offers exposure to higher-return opportunities in fast-growing segments of the market, the Quality Index focusses on stocks with resilient earnings and a layer of stability against drawdowns. With India poised for sustained economic growth, both strategies offer a timely and complementary approach to long-term investing. Investors may choose either fund or a combination both funds based on their investment horizon, risk tolerance, and return expectations."*

Adopting the smart beta investment strategy, both funds are built on a low-cost, no-entry load with minimal exit load structure and are aligned with ABSLAMC's philosophy of delivering

balanced exposure across market capitalizations. The Quality Index typically maintains an equitable ~50% allocation to large-cap stocks with the remainder in mid- and small-caps. The Momentum Index is more agile with quicker shift in cap structure having a combined ~70% exposure to mid- and smallcap as of June rebalance.

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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 10.6 million investor folios with a pan India presence across 300+ locations and overall AUM of Rs. 4,056 billion for the quarter ending March 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 60,000 employees, the businesses of ABCL have a nationwide reach with over 1,623 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 over Rs. 5.11 Lakh Crore with a consolidated lending book of over Rs 1.57 Lakh Crore as of March 31, 2025.

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 Mar 31, 2025, Sun Life had total assets under management of \$1.55 trillion. For more information, please visit [www.sunlife.com](http://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.

# Press Release

Aditya Birla Sun Life  
AMC Ltd.


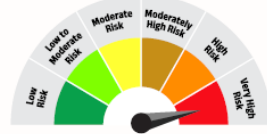


Aditya Birla Sun Life BSE 500 Momentum 50 Index Fund and Aditya Birla Sun Life BSE 500 Quality 50 Index Fund (“Schemes”) are based on the BSE 500 Momentum 50 Total Return Index and BSE 500 Quality 50 Total Return Index respectively. BSE® is a registered trademark of BSE Limited. The Scheme is not sponsored, endorsed marketed or promoted by BSE or their affiliates. Please refer to the Scheme Information Document of the respective schemes for disclaimers.

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

## Aditya Birla Sun Life BSE 500 Momentum 50 Index Fund



(An open ended Index Fund replicating the BSE 500 Momentum 50 Total Return Index)

This product is suitable for investors who are seeking*:	Scheme Risk-o-meter#	Benchmark Risk-o-meter (BSE 500 Momentum 50 Total Return Index)
<ul style="list-style-type: none"><li>Long term capital growth</li><li>Investment in equity and equity related securities covered by BSE 500 Momentum 50 Total Return Index, subject to tracking errors</li></ul>	 The risk of the scheme is <b>Very High</b>	 The risk of the benchmark is <b>Very High</b>
*Investors should consult their financial advisors if in doubt whether the product is suitable for them.		

#The above product labelling and riskometer 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.

## Aditya Birla Sun Life BSE 500 Quality 50 Index Fund

(An open ended Index Fund replicating the BSE 500 Quality 50 Total Return Index)

This product is suitable for investors who are seeking*:	Scheme Risk-o-meter#	Benchmark Risk-o-meter (BSE 500 Quality 50 Total Return Index)
<ul style="list-style-type: none"><li>Long term capital growth</li><li>Investment in equity and equity related securities covered by BSE 500 Quality 50 Total Return Index, subject to tracking errors.</li></ul>	 The risk of the scheme is <b>Very High</b>	 The risk of the benchmark is <b>Very High</b>
*Investors should consult their financial advisors if in doubt whether the product is suitable for them.		

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