

Market Update

From Sachin Bajaj - Head Investments



Macroeconomic Summary

- Escalation in USA-Iran war and the effective closure of the Strait of Hormuz triggered a broader risk-off sentiment across globe.
- On the Monetary policy front, the US Fed maintained status quo on interest rates at 3.50-3.75% in Mar`26, staying data-dependent amid inflation fears.
- India's trade deficit for the month of Feb`26 narrowed to \$27.1bn (from \$34.7bn in Jan`26) primarily driven by lower import growth.
- India's Manufacturing PMI dropped to its lowest level in four and half years, falling to 53.8 in Mar`26 (from 57.5 previously)
- USD-INR depreciated by 4% during the month, ending the month at INR 94.81/USD. To curtail the heightened volatility, RBI undertook policy measures that helped INR regain back to below 93 levels.
- Due to war and supply disruptions, brent crude rose by 63% to USD 118/bbl in Mar`26 while Gold and Silver declined by 12% and 20% respectively during the month.



Fixed Income

- Energy driven inflation fears pushed global yields higher; US 10-year treasury jumped 38 bps to 4.3% and yield on India 10-year benchmark Govt. Security rose to 7.04% on inflation and fiscal worries.
- In Apr`26 Monetary Policy Review, MPC maintained status quo on Repo rate and policy stance as Neutral. The real GDP growth forecast for FY27 kept at 6.9% and CPI at 4.6% with risk to upside due to West Asia conflict and possibility of El-Nino which may have negative impact on monsoon this year.
- Government announced borrowing calendar for H1-FY2027. H1 gross borrowing came lower than expectations, at Rs. 8.20 trn, which represents 51% of total gross borrowing of FY27 (versus historical trend of borrowing 55% in H1)



Equity

- Indian equity markets were dominated by heightened global uncertainty, sharp swings in crude oil prices, and sustained FPI outflows.
- Nifty declined 11.3% for the month. Mid-cap and small-cap indices experienced a similar fall and declined 10.9% and 10.2% respectively.
- All sectoral indices declined in the red, with Banks, Realty and Auto showing a sharp fall, declining 17%, 16.8% and 15.5% respectively.
- Among global markets, Indian markets (-11.3%) remained one of the underperforming markets after South Korea (-19.1%), Indonesia (-14.4%) and Japan (-13.2%).
- Foreign Portfolio Investors recorded their highest monthly outflow of \$13.3bn in Mar`26 (versus inflow of \$1.7bn in Feb). Domestic Institutional Investors recorded their highest ever inflows in month at \$15.4bn (versus \$4.2bn in Feb`26)

AXIS MAX LIFE FUND SNAPSHOT

Total Asset Under Management (AUM) as on 31st March 2026 : ₹1,89,794 Crores*

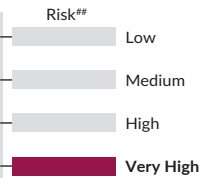
High Growth Fund (SFIN: ULIF01311/02/08LIFEHIGHGR104)

Morningstar Rating# **5** ★★★★★

Nature of Fund

An Open ended equity Multicap Fund with focus on midcap

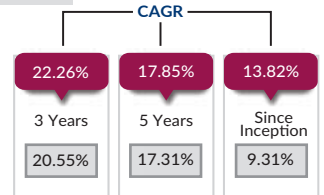
AUM (in Rs. Cr.)	11912.18	Inception Date	26/02/2008	Fund Management Charge	1.25%
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Asset Allocation

0.00% Govt. Securities
0.00% Corporate Bonds
3.71% Money Market or Equivalent
96.29% Equities

Benchmark - Nifty MidCap Free Float 100%



■ Benchmark Return ■ Actual Return

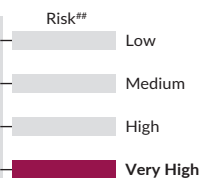
Growth Super Fund (SFIN: ULIF01108/02/07LIFEGRWSUP104)

Morningstar Rating# **4** ★★★★★

Nature of Fund

An Open ended equity Fund with focus on large cap

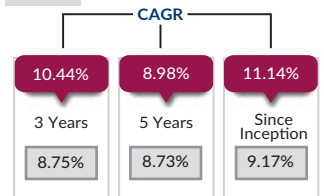
AUM (in Rs. Cr.)	10702.74	Inception Date	21/05/2007	Fund Management Charge	1.25%
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Asset Allocation

0.00% Govt. Securities
0.00% Corporate Bonds
1.85% Money Market or Equivalent
98.15% Equities

Benchmark - NSE Nifty 100%
Morningstar peer category (Large Cap) average return*



■ Benchmark Return ■ Actual Return

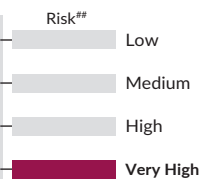
Diversified Equity Fund (SFIN: ULIF02201/01/20LIFEDIVEQF104)

Morningstar Rating# **4** ★★★★★

Nature of Fund

An open ended equity fund with focus on mid caps

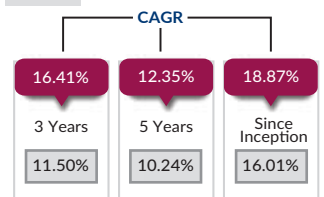
AUM (in Rs. Cr.)	3043.11	Inception Date	08/06/2020	Fund Management Charge	1.25%
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Asset Allocation

0.00% Govt. Securities
0.00% Corporate Bonds
3.39% Money Market or Equivalent
96.61% Equities

Benchmark - NSE Nifty 200 100%



■ Benchmark Return ■ Actual Return

Above fund returns are after deduction of Fund Management Charges (FMC)

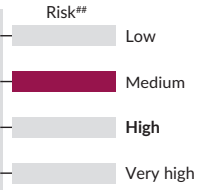
**Risk Nature of Fund Classification: Low - equity exposure nil, Medium - equity exposure up to 50%, High - equity exposure 50% to 70% & Very High - equity exposure 70% to 100%
*The 'Morningstar Rating' is a quantitative assessment of a fund's past performance-both return and risk-as measured from one to five stars, with one (1) being the lowest and five (5) being the best.

The unit linked insurance products do not offer any liquidity during the first five years of the contract. The policyholder will not be able to surrender / withdraw the monies invested in linked insurance products completely or partially till the end of fifth year.

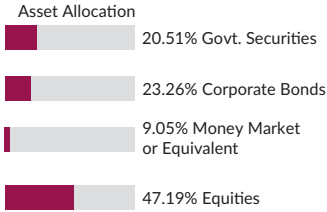
Growth Fund (SFIN: ULIF00125/06/04LIFEGROWTH104)

Nature of Fund

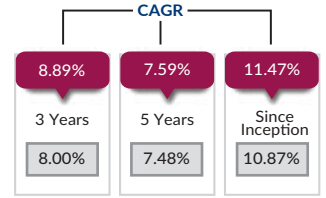
An Open ended hybrid Fund with equity portion focus on large cap



AUM (in Rs. Cr.)	6276.34	Inception Date	20/09/2004	Fund Management Charge	1.25%
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Benchmark - Crisil Bond Index 50% and NSE Nifty 50%



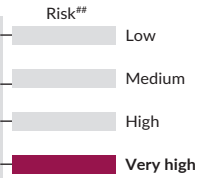
Benchmark Return Actual Return

Sustainable Equity Fund (SFIN: ULIF02505/10/21SUSTAIN EQU104)

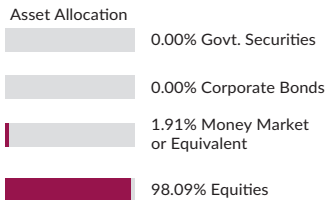
Morningstar Rating# 5 ★★★★★

Nature of Fund

An open ended equity fund investing in companies that are in compliance on ESG principles

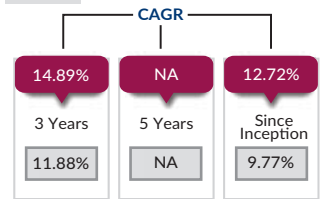


AUM (in Rs. Cr.)	544.24	Inception Date	25/05/2022	Fund Management Charge	1.25%
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Benchmark - Custom ESG Index* 100%

(*The Index developed and maintained by National Stock Exchange of India Ltd (NSE)



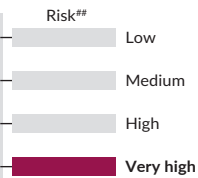
Benchmark Return Actual Return

Pure Growth Fund (SFIN: ULIF02630/12/22PUREGROWTH104)

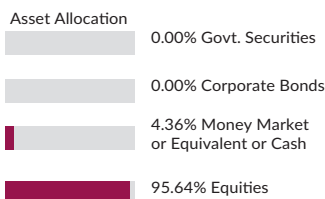
Morningstar Rating# 4 ★★★★★

Nature of Fund

An open ended equity fund which specifically excludes investments in companies dealing in Banking, Alcohol, Tobacco products etc.

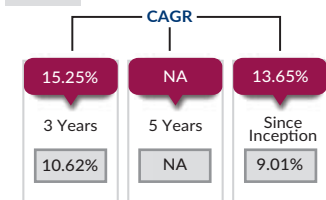


AUM (in Rs. Cr.)	453.58	Inception Date	08/02/2023	Fund Management Charge	1.25%
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Benchmark - Customised Pure Equity* 100%

(*The Index is developed and maintained by National Stock Exchange of India Ltd (NSE)

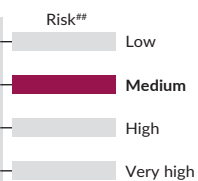


Benchmark Return Actual Return

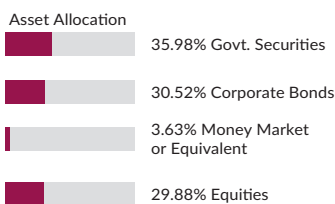
Balanced Fund (SFIN: ULIF00225/06/04LIFEBALANC104)

Nature of Fund

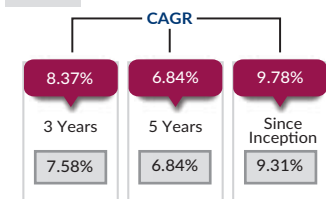
An Open ended hybrid Fund investing in a mixture of debt instruments and equities



AUM (in Rs. Cr.)	1974.77	Inception Date	20/09/2004	Fund Management Charge	1.10%
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Benchmark - Crisil Bond Index 70% and NSE Nifty 30%



Benchmark Return Actual Return

Above fund returns are after deduction of Fund Management Charges (FMC)

**Risk Nature of Fund Classification: Low - equity exposure nil, Medium - equity exposure up to 50%, High - equity exposure 50% to 70% & Very High - equity exposure 70% to 100%

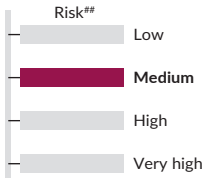
*The 'Morningstar Rating' is a quantitative assessment of a fund's past performance-both return and risk-as measured from one to five stars, with one (1) being the lowest and five (5) being the best.

The Index developed and maintained by National Stock Exchange of India Ltd (NSE). The unit linked insurance products do not offer any liquidity during the first five years of the contract. The policyholder will not be able to surrender / withdraw the monies invested in linked insurance products completely or partially till the end of fifth year.

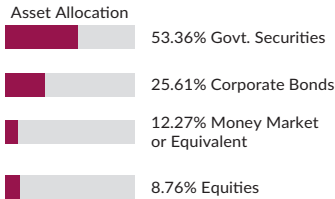
Conservative Fund (SFIN: ULIF00325/06/04LIFECONSER104)

Nature of Fund

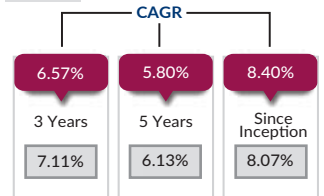
An Open ended hybrid Fund investing predominantly in debt instruments



AUM (in Rs. Cr.)	190.15	Inception Date	20/09/2004	Fund Management Charge	0.90%
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Benchmark - Crisil Bond Index 90% and NSE Nifty 10%

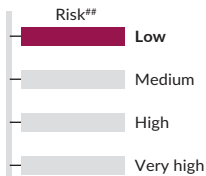


Benchmark Return Actual Return

Secure Plus Fund (SFIN: ULIF01628/04/09LIFESECLP104)

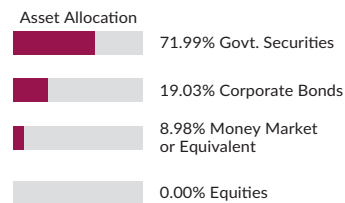
Nature of Fund

An Open ended debt fund which invests across duration with bias towards government securities

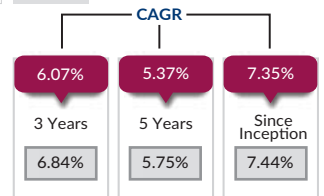


Morningstar Rating# 4 ★★★★★

AUM (in Rs. Cr.)	196.12	Inception Date	28/04/2009	Fund Management Charge	0.90%
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Benchmark - Crisil Bond Index 100%

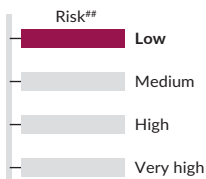


Benchmark Return Actual Return

Secured Fund (SFIN: ULIF00425/06/04LIFESECURE104)

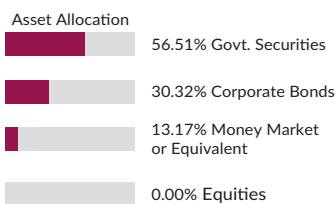
Nature of Fund

An Open ended debt fund which invests across duration

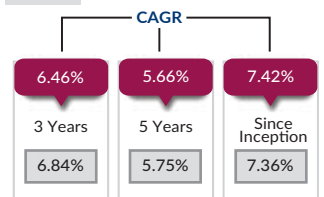


Morningstar Rating# 4 ★★★★★

AUM (in Rs. Cr.)	1106.75	Inception Date	20/9/2004	Fund Management Charge	0.90%
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Benchmark - Crisil Bond Index 100%

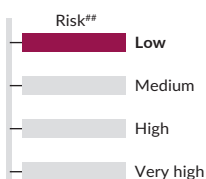


Benchmark Return Actual Return

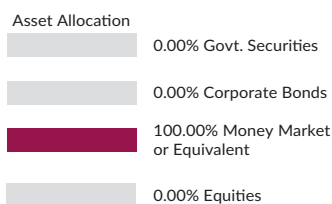
Money Market II Fund (SFIN: ULIF02301/01/20LIFEMONMK2104)

Nature of Fund

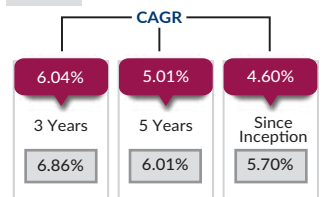
An Open ended liquid Fund which invests only in money market instruments



AUM (in Rs. Cr.)	104.05	Inception Date	08/06/2020	Fund Management Charge	0.90%
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Benchmark - Crisil Liquid Index 100%



Benchmark Return Actual Return

Above fund returns are after deduction of Fund Management Charges (FMC)

**Risk Nature of Fund Classification: Low - equity exposure nil, Medium - equity exposure up to 50%, High - equity exposure 50% to 70% & Very High - equity exposure 70% to 100%

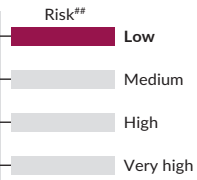
*The 'Morningstar Rating' is a quantitative assessment of a fund's past performance-both return and risk-as measured from one to five stars, with one (1) being the lowest and five (5) being the best.

The unit linked insurance products do not offer any liquidity during the first five years of the contract. The policyholder will not be able to surrender / withdraw the monies invested in linked insurance products completely or partially till the end of fifth year.

Dynamic Bond Fund (SFIN: ULIF02401/01/20LIFEDYNBOF104)

Nature of Fund

An Open ended debt fund which invests across duration with bias towards corporate bonds

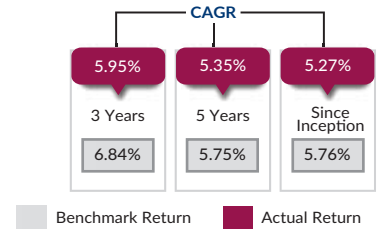


AUM (in Rs. Cr.)	38.01	Inception Date	08/06/2020	Fund Management Charge	0.90%
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Asset Allocation

84.25% Fixed Income Securities (Bonds & Govt. Securities)
15.75% Money Market or Equivalent
0.00% Equities

Benchmark - Crisil Bond Index 100%

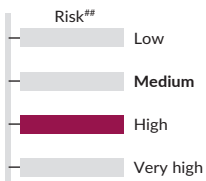


Pension Maximiser Fund (SFIN: ULIF01715/02/13PENSMAXIMI104)

Morningstar Rating# 5 ★★★★★

Nature of Fund

An open ended hybrid fund investing in a mixture of debt instruments and equities

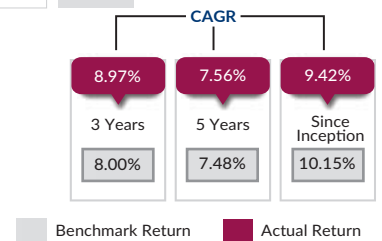


AUM (in Rs. Cr.)	409.35	Inception Date	19/08/2013	Fund Management Charge	1.65%
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Asset Allocation

44.20% Fixed Income Securities (Bonds & Govt. Securities)
3.73% Money Market or Equivalent
52.07% Equities

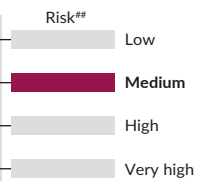
Benchmark - Crisil Bond Index 50% and NSE Nifty 50%



Pension Preserver Fund (SFIN: ULIF01815/02/13PENSPRESER104)

Nature of Fund

An open ended hybrid fund investing predominantly in debt instruments

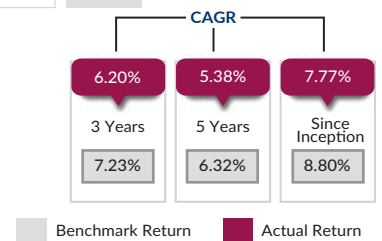


AUM (in Rs. Cr.)	66.46	Inception Date	20/08/2013	Fund Management Charge	1.45%
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Asset Allocation

73.23% Fixed Income Securities (Bonds & Govt. Securities)
10.05% Money Market or Equivalent
16.72% Equities

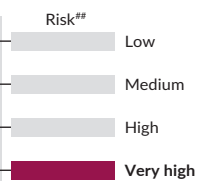
Benchmark - Crisil Bond Index 85% and NSE Nifty 15%



Nifty Smallcap Quality Index Fund (SFIN: ULIF02702/08/23NIFTYSMALL104)

Nature of Fund

An open ended equity fund with focus on small caps.

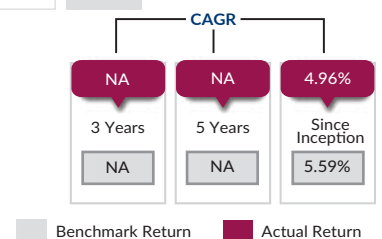


AUM (in Rs. Cr.)	1100.75	Inception Date	28/08/2023	Fund Management Charge	1.00%
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Asset Allocation

0.00% Govt. Securities
0.00% Corporate Bonds
0.30% Money Market or Equivalent
99.70% Equities

Benchmark - NIFTY Smallcap 250 Quality 50 Index



Above fund returns are after deduction of Fund Management Charges (FMC)

**Risk Nature of Fund Classification: Low - equity exposure nil, Medium - equity exposure up to 50%, High - equity exposure 50% to 70% & Very High - equity exposure 70% to 100%
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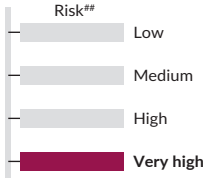
The unit linked insurance products do not offer any liquidity during the first five years of the contract. The policyholder will not be able to surrender / withdraw the monies invested in linked insurance products completely or partially till the end of fifth year.

Midcap Momentum Index Fund (SFIN: ULIF02801/01/24MIDMOMENTM104)

Nature of Fund

An open ended equity fund with focus on mid caps.

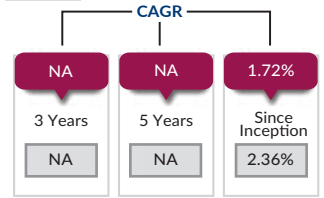
AUM (in Rs. Cr.)	1090.80	Inception Date	30/01/2024	Fund Management Charge	1.25%
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Asset Allocation

0.00%	Govt. Securities
0.00%	Corporate Bonds
-0.45%	Money Market or Equivalent
100.45%	Equities

Benchmark - Midcap 150 Momentum 50 Index



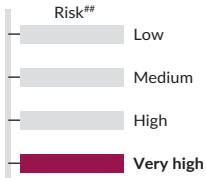
Legend: Benchmark Return (Grey), Actual Return (Dark Red)

Nifty Alpha 50 Fund (SFIN: ULIF02914/05/24ALPHA50104)

Nature of Fund

An open ended equity fund with focus on small caps, mid cap and large cap

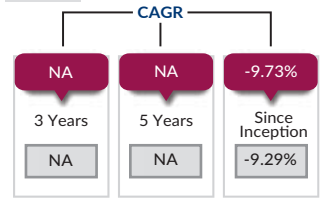
AUM (in Rs. Cr.)	623.13	Inception Date	31/05/2024	Fund Management Charge	1.25%
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Asset Allocation

0.00%	Govt. Securities
0.00%	Corporate Bonds
0.92%	Money Market or Equivalent
99.08%	Equities

Benchmark - Nifty Alpha 50 Index



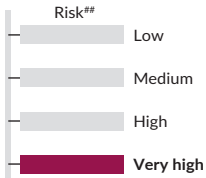
Legend: Benchmark Return (Grey), Actual Return (Dark Red)

Nifty 500 Momentum 50 Fund (SFIN: ULIF03015/08/24MOMENFIFTY104)

Nature of Fund

An open ended equity fund with focus on small caps, mid cap and large cap

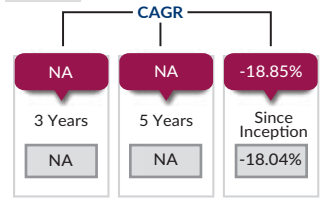
AUM (in Rs. Cr.)	230.87	Inception Date	02/09/2024	Fund Management Charge	1.25%
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Asset Allocation

0.00%	Govt. Securities
0.00%	Corporate Bonds
0.22%	Money Market or Equivalent
99.78%	Equities

Benchmark - NIFTY 500 Momentum 50 Index



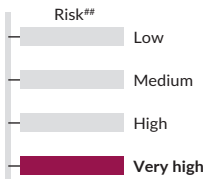
Legend: Benchmark Return (Grey), Actual Return (Dark Red)

Nifty Momentum Quality 50 Fund (SFIN: ULIF03127/10/24MOMQUALITY104)

Nature of Fund

An open ended equity fund with focus on small caps, mid cap and large cap

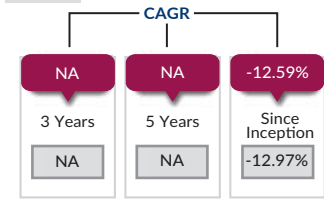
AUM (in Rs. Cr.)	125.10	Inception Date	18/11/2024	Fund Management Charge	1.25%
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Asset Allocation

0.00%	Govt. Securities
0.00%	Corporate Bonds
-0.56%	Money Market or Equivalent
100.56%	Equities

Benchmark - NSE Nifty 500 Multicap Momentum Quality 50 Index



Legend: Benchmark Return (Grey), Actual Return (Dark Red)

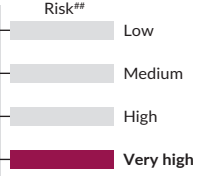
Above fund returns are after deduction of Fund Management Charges (FMC)

**Risk Nature of Fund Classification: Low - equity exposure nil, Medium - equity exposure up to 50%, High - equity exposure 50% to 70% & Very High - equity exposure 70% to 100%
 *The 'Morningstar Rating' is a quantitative assessment of a fund's past performance-both return and risk-as measured from one to five stars, with one (1) being the lowest and five (5) being the best.
 The unit linked insurance products do not offer any liquidity during the first five years of the contract. The policyholder will not be able to surrender / withdraw the monies invested in linked insurance products completely or partially till the end of fifth year.

Sustainable Wealth 50 Index Fund (SFIN: ULIF03223/12/24SUSTWEALTH104)

Nature of Fund

An open-ended quantitative passive index fund investing in 50 companies based on FCF Yield and Dividend Yield

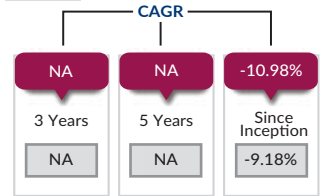


AUM (in Rs. Cr.)	119.89	Inception Date	17/01/2025	Fund Management Charge	1.25%
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Asset Allocation

0.00% Govt. Securities
0.00% Corporate Bonds
-0.46% Money Market or Equivalent
100.46% Equities

Benchmark - Sustainable Yield Index

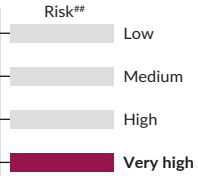


■ Benchmark Return ■ Actual Return

Smart Innovation Fund (SFIN: ULIF03301/03/25INNOVATION104)

Nature of Fund

An equity-oriented scheme investing in innovative companies and business with the objective to generate long term capital appreciation.

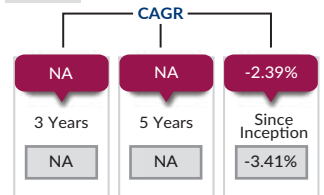


AUM (in Rs. Cr.)	53.98	Inception Date	21/03/2025	Fund Management Charge	1.25%
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Asset Allocation

0.00% Govt. Securities
0.00% Corporate Bonds
4.97% Money Market or Equivalent
95.03% Equities

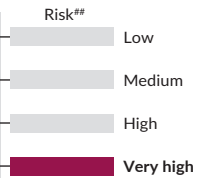
Benchmark - Nifty 500 Index



■ Benchmark Return ■ Actual Return

Nifty 500 Multifactor 50 Index Fund (SFIN: ULIF03414/05/25MULTIFACTO104)

An open ended passive equity index investing in a 50-stock portfolio selected based on a combination of momentum, quality, value and low volatility factors from the Nifty500.

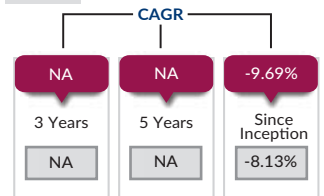


AUM (in Rs. Cr.)	62.02	Inception Date	05/06/2025	Fund Management Charge	1.25%
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Asset Allocation

0.00% Govt. Securities
0.00% Corporate Bonds
0.39% Money Market or Equivalent
99.61% Equities

Benchmark - NSE Nifty 500 Multifactor MQLV 50 Index

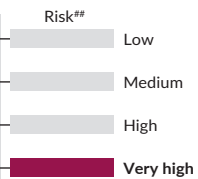


■ Benchmark Return ■ Actual Return

Nifty 500 Multifactor 50 Index Pension Fund (SFIN: ULIF03523/06/25PENSMULFAC104)

Nature of Fund

An open ended passive equity index investing in a 50-stock portfolio selected based on a combination of momentum, quality, value and low volatility factors from the Nifty500.

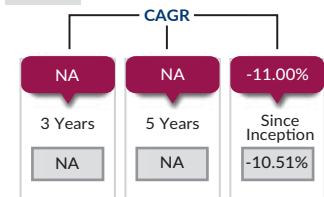


AUM (in Rs. Cr.)	25.62	Inception Date	16/7/2025	Fund Management Charge	1.35%
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Asset Allocation

0.00% Govt. Securities
0.00% Corporate Bonds
0.76% Money Market or Equivalent
99.24% Equities

Benchmark - NSE Nifty 500 Multifactor MQLV 50 Index



■ Benchmark Return ■ Actual Return

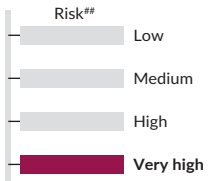
Above fund returns are after deduction of Fund Management Charges (FMC)

**Risk Nature of Fund Classification: Low - equity exposure nil, Medium - equity exposure up to 50%, High - equity exposure 50% to 70% & Very High - equity exposure 70% to 100%
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 The unit linked insurance products do not offer any liquidity during the first five years of the contract. The policyholder will not be able to surrender / withdraw the monies invested in linked insurance products completely or partially till the end of fifth year.

BSE 500 Value 50 Index Fund (SFIN: ULIF03623/07/25BSEVALUEIN104)

Nature of Fund

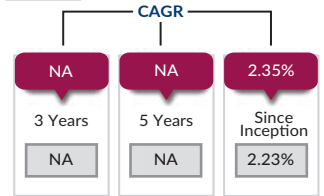
An open-ended passive equity index investing in a 50-stock portfolio selected based Value parameters.



AUM (in Rs. Cr.)	114.57	Inception Date	11/08/2025	Fund Management Charge	1.25%
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Asset Allocation	
0.00%	Govt. Securities
0.00%	Corporate Bonds
0.90%	Money Market or Equivalent
99.10%	Equities

Benchmark - BSE 500 Enhanced Value 50 Index

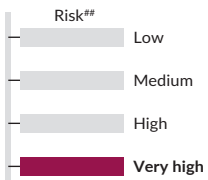


Legend: Benchmark Return (Grey), Actual Return (Dark Red)

India Consumption Opportunities (SFIN: ULIF03807/10/25INDIACONSU104)

Nature of Fund

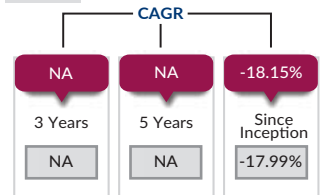
An equity-oriented scheme investing in companies operating in the consumption sector and its related or allied industries



AUM (in Rs. Cr.)	26.25	Inception Date	27/10/2025	Fund Management Charge	1.25%
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Asset Allocation	
0.00%	Govt. Securities
0.00%	Corporate Bonds
14.29%	Money Market or Equivalent
85.71%	Equities

Benchmark - Nifty Consumption Index

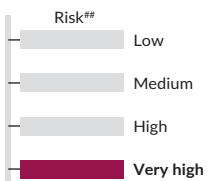


Legend: Benchmark Return (Grey), Actual Return (Dark Red)

BSE 500 Dividend Leaders 50 Index Fund (SFIN: ULIF03907/11/25BSEDIVLEAD104)

Nature of Fund

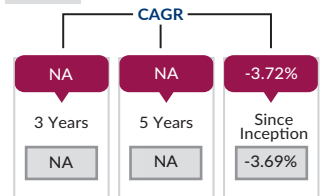
The objective of the fund is to invest in a basket of stocks drawn from the constituents of BSE 500 Dividend leaders 50 Index.



AUM (in Rs. Cr.)	77.96	Inception Date	23/11/2025	Fund Management Charge	1.25%
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Asset Allocation	
0.00%	Govt. Securities
0.00%	Corporate Bonds
1.37%	Money Market or Equivalent
98.63%	Equities

Benchmark - BSE 500 Dividend leaders 50 Index

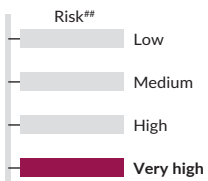


Legend: Benchmark Return (Grey), Actual Return (Dark Red)

High Growth Fund II (SFIN: ULIF04117/12/25HIGHGROWTH104)

Nature of Fund

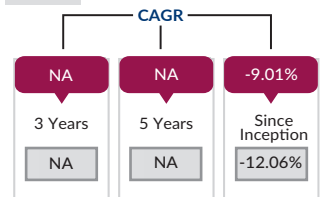
An open ended equity fund with a focus on Mid Caps



AUM (in Rs. Cr.)	81.12	Inception Date	16/01/2026	Fund Management Charge	1.35%
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Asset Allocation	
0.00%	Govt. Securities
0.00%	Corporate Bonds
7.69%	Money Market or Equivalent
92.31%	Equities

Benchmark - NSE Nifty Midcap 100



Legend: Benchmark Return (Grey), Actual Return (Dark Red)

Above fund returns are after deduction of Fund Management Charges (FMC)

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Growth Super Fund II (SFIN: ULIF04217/12/25GROWTHSUPR104)
Nature of Fund

An open ended equity fund with focus on large caps

AUM (in Rs. Cr.)

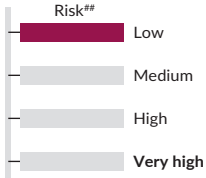
29.04

Inception Date

24/12/2025

Fund Management Charge

1.35%


Asset Allocation

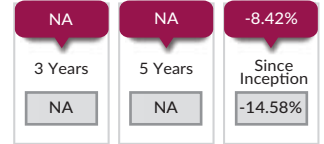
0.00% Govt. Securities

0.00% Corporate Bonds

10.11% Money Market or Equivalent

89.89% Equities

Benchmark - NSE Nifty 50

CAGR


Benchmark Return

Actual Return

BHAROSA TUM HO


^Individual Death Claims Paid Ratio as per Audited Financials for FY 2024-2025 | *As per Public Disclosure for H1 FY 2024-2025.

The premium shall be adjusted on the due date even if it has been received in advance.

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Please know the associated risks and the applicable charges, from your insurance agent or intermediary or policy document issued by the insurance company. The various funds offered are the names of the funds and do not in any way indicate the quality of these plans, their future prospects and returns.

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