

Market Update

From Sachin Bajaj - Head Investments



Macroeconomic Summary

- Middle East tensions dominated global markets. The ceasefire announcement and easing of blockade on the Strait of Hormuz, towards the end of the month, led to softening of oil prices and supported sentiment for risk assets.
- In its June review of policy, US Fed Reserve kept the policy rates unchanged at 3.5-3.75%. The Fed members expect an increase in policy rates by 25bps each in 2026 and 2027.
- India's macro backdrop remained resilient despite Middle East tensions; easing crude prices improved sentiment across growth, inflation and external accounts.
- India's Q4FY26 GDP grew 7.8% YoY – ahead of expectations, taking FY26 GDP growth to 7.7%, supported by strength in services and manufacturing.
- Indian Rupee appreciated 0.4% during June to 94.67/USD, aided by lower crude prices, RBI measures and strong debt inflows. The rupee was among the relatively better-performing emerging market currencies during the month.
- The Monsoon season started weak with lowest rainfall in over a decade, keeping weather-related inflation and growth risks under focus. .



Fixed Income

- In its June policy review, RBI Monetary Policy Committee (MPC) kept the repo rate unchanged at 5.25% and maintained a cautious stance amid rising geopolitical and inflation risks.
- The RBI revised its FY27 inflation forecast upward to 5.1% from 4.6%, while lowering its FY27 GDP growth forecast to 6.6% from 6.9%. These revisions reflect concerns around energy shocks and supply-side disruptions.
- RBI announced significant measures to boost forex liquidity and capital inflows, including FCNR(B) incentives, PSU forex swap facilities and steps to strengthen external stability. Headline CPI rose to 3.9% in May (versus 3.5% in April), while core CPI increased to 3.8%.
- The 10-year benchmark government bond yield rallied by 25 basis points to 6.75%, supported by strong demand from FPIs, RBI liquidity measures, and expectations of stable policy rates.
- FPIs bought bonds worth USD 5.1 bn during the month (FYTD: USD 5.2bn).



Equity

- Nifty50 index gained 1.4% during the month of June. The Mid-cap index ended largely flat, whereas the small-cap index gained 4%.
- Sectoral performance was led by Banks (+6.1%), Real Estate (+6.0%) and Healthcare (+5.3%). On the other hand, Information Technology (-9.6%), Metals (-8.1%), and Power (-3.4%) were the worst performing sectors. Continued concerns around AI-led disruption and weaker global technology spending weighed heavily on the IT sector.
- FPI equity outflows moderated to USD 3.1bn in June versus USD 4.9bn in May and USD 5.2bn in April. DIIs on the other hand, continued their inflows at USD 9.0 bn versus USD 8.7bn in May.
- Global equity markets remained mixed. Developed market indices corrected amid concerns over elevated AI-related valuations, sticky inflation, and restrictive monetary policies. S&P 500 declined 1.8%, Hang Seng fell 9.1%, while Japan's Nikkei gained 5.6% during the month.

AXIS MAX LIFE FUND SNAPSHOT

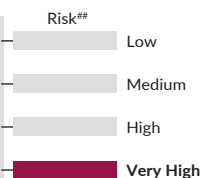
Total Asset Under Management (AUM) as on 30th June 2026 : ₹2,02,620 Crores*

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.)

14797.91

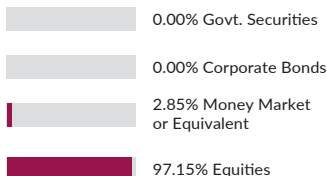
Inception Date

26/02/2008

Fund Management Charge

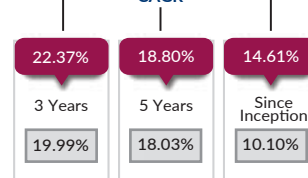
1.25%

Asset Allocation



Benchmark - Nifty MidCap Free Float 100%

CAGR



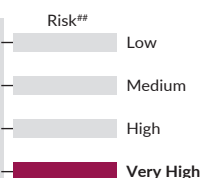
Legend: Benchmark Return (Grey), Actual Return (Red)

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.)

11426.07

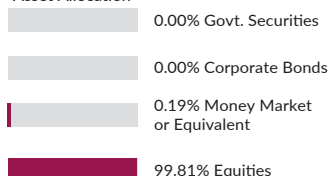
Inception Date

21/05/2007

Fund Management Charge

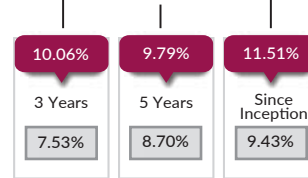
1.25%

Asset Allocation



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

CAGR



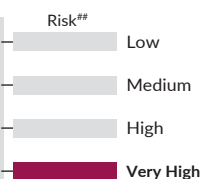
Legend: Benchmark Return (Grey), Actual Return (Red)

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.)

3462.57

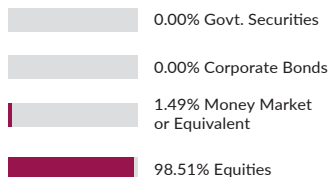
Inception Date

08/06/2020

Fund Management Charge

1.25%

Asset Allocation



Benchmark - NSE Nifty 200 100%

CAGR



Legend: Benchmark Return (Grey), Actual Return (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%

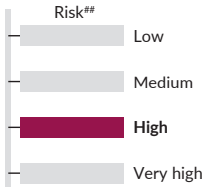
*The 'Morningstar Rating' is a quantitative assessment of a fund's past performance-both return and risk-as measured from one to five stars, with one (1) being the lowest and five (5) being the best.

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.

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

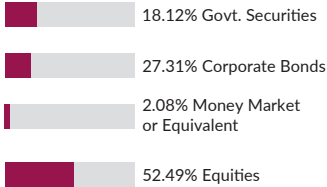
Nature of Fund

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

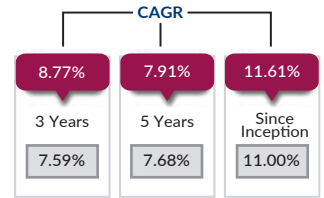


AUM (in Rs. Cr.)	6357.09	Inception Date	20/09/2004	Fund Management Charge	1.25%
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Asset Allocation



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

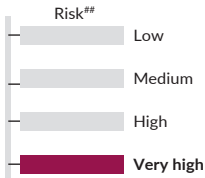


Benchmark Return Actual Return

Sustainable Equity Fund (SFIN: ULIF02505/10/21SUSTAINEDQU104)

Nature of Fund

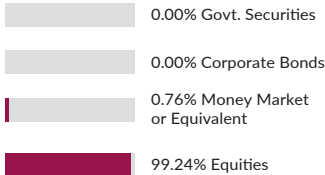
An open ended equity fund investing in companies that are in compliance on ESG principles



Morningstar Rating# **5** ★★★★★

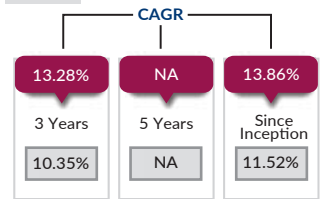
AUM (in Rs. Cr.)	621.35	Inception Date	25/05/2022	Fund Management Charge	1.25%
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Asset Allocation



Benchmark - Custom ESG Index* 100%

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

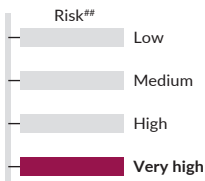


Benchmark Return Actual Return

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

Nature of Fund

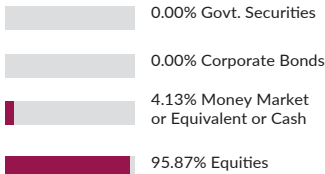
An open ended equity fund which specifically excludes investments in companies dealing in Banking, Alcohol, Tobacco products etc.



Morningstar Rating# **4** ★★★★☆

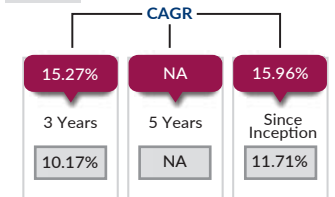
AUM (in Rs. Cr.)	542.25	Inception Date	08/02/2023	Fund Management Charge	1.25%
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Asset Allocation



Benchmark - Customised Pure Equity* 100%

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

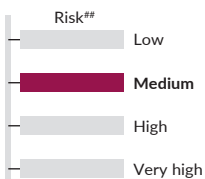


Benchmark Return Actual Return

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

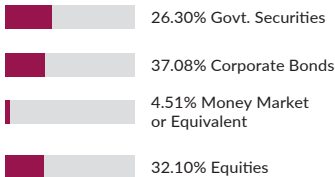
Nature of Fund

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

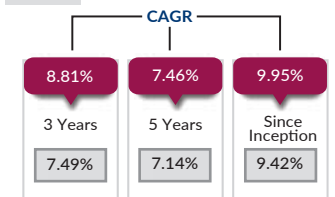


AUM (in Rs. Cr.)	1957.51	Inception Date	20/09/2004	Fund Management Charge	1.10%
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Asset Allocation



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%

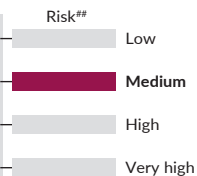
#The 'Morningstar Rating' is a quantitative assessment of a fund's past performance-both return and risk-as measured from one to five stars, with one (1) being the lowest and five (5) being the best.

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.)

185.07

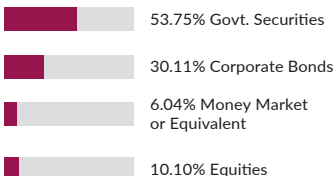
Inception Date

20/09/2004

Fund Management Charge

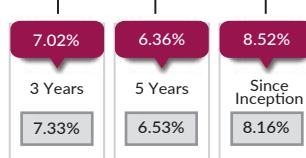
0.90%

Asset Allocation



Benchmark - Crisil Bond Index 90% and NSE Nifty 10%

CAGR



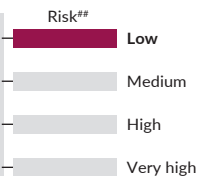
Benchmark Return

Actual Return

Secure Plus Fund (SFIN: ULIF01628/04/09LIFESECPLS104)

Nature of Fund

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



Morningstar Rating# 4 ★★★★★

AUM (in Rs. Cr.)

170.38

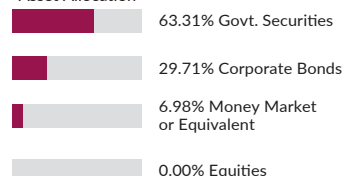
Inception Date

28/04/2009

Fund Management Charge

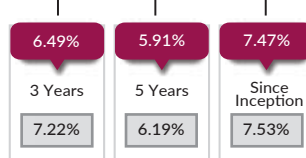
0.90%

Asset Allocation



Benchmark - Crisil Bond Index 100%

CAGR



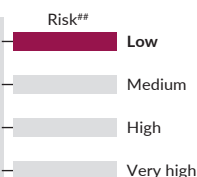
Benchmark Return

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.)

1061.20

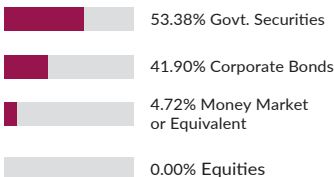
Inception Date

20/9/2004

Fund Management Charge

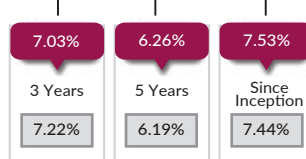
0.90%

Asset Allocation



Benchmark - Crisil Bond Index 100%

CAGR



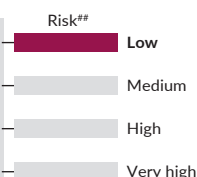
Benchmark Return

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.)

111.02

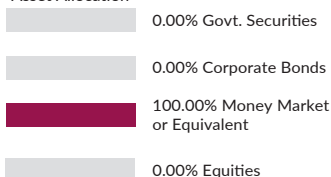
Inception Date

08/06/2020

Fund Management Charge

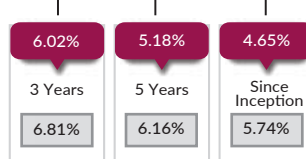
0.90%

Asset Allocation



Benchmark - Crisil Liquid Index 100%

CAGR



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%

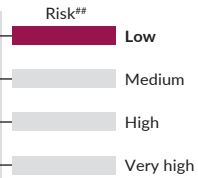
*The 'Morningstar Rating' is a quantitative assessment of a fund's past performance-both return and risk-as measured from one to five stars, with one (1) being the lowest and five (5) being the best.

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)

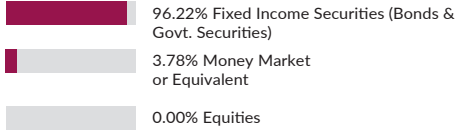
Nature of Fund

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

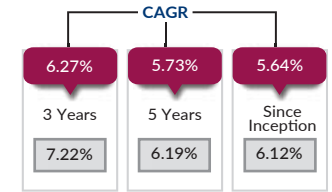


AUM (in Rs. Cr.)	38.54	Inception Date	08/06/2020	Fund Management Charge	0.90%
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Asset Allocation



Benchmark - Crisil Bond Index 100%



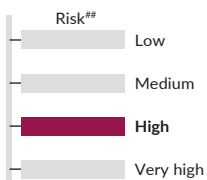
Benchmark Return Actual Return

Pension Maximiser Fund (SFIN: ULIF01715/02/13PENSMAIMI104)

Morningstar Rating# 5 ★★★★★

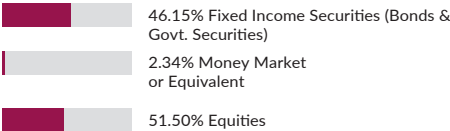
Nature of Fund

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

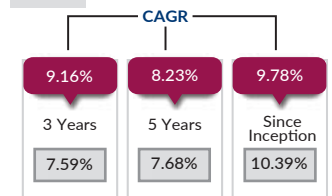


AUM (in Rs. Cr.)	413.82	Inception Date	19/08/2013	Fund Management Charge	1.65%
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Asset Allocation



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

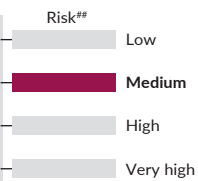


Benchmark Return Actual Return

Pension Preserver Fund (SFIN: ULIF01815/02/13PENSRESER104)

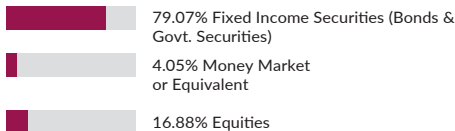
Nature of Fund

An open ended hybrid fund investing predominantly in debt instruments

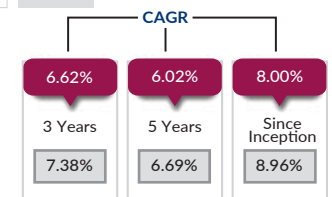


AUM (in Rs. Cr.)	56.12	Inception Date	20/08/2013	Fund Management Charge	1.45%
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Asset Allocation



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

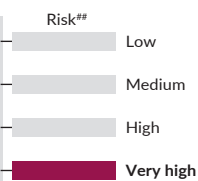


Benchmark Return Actual Return

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

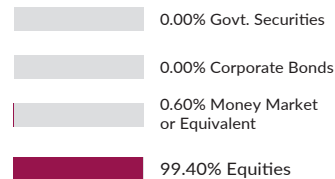
Nature of Fund

An open ended equity fund with focus on small caps.

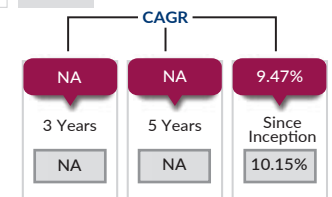


AUM (in Rs. Cr.)	1300.46	Inception Date	28/08/2023	Fund Management Charge	1.00%
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Asset Allocation



Benchmark - NIFTY Smallcap 250 Quality 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%

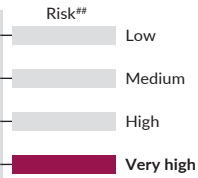
*The 'Morningstar Rating' is a quantitative assessment of a fund's past performance-both return and risk-as measured from one to five stars, with one (1) being the lowest and five (5) being the best.

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.

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.)

1354.83

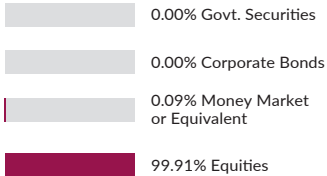
Inception Date

30/01/2024

Fund Management Charge

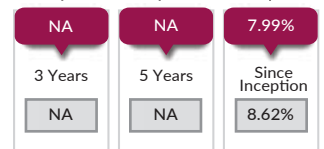
1.25%

Asset Allocation



Benchmark - Midcap 150 Momentum 50 Index

CAGR



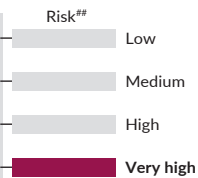
Benchmark Return

Actual Return

Nifty Alpha 50 Fund (SFIN: ULIF02914/05/24ALPHA50FUND104)

Nature of Fund

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



AUM (in Rs. Cr.)

819.00

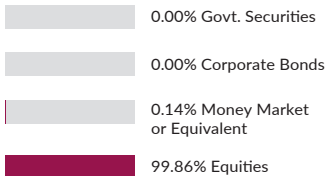
Inception Date

31/05/2024

Fund Management Charge

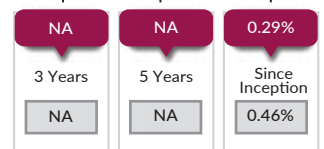
1.25%

Asset Allocation



Benchmark - Nifty Alpha 50 Index

CAGR



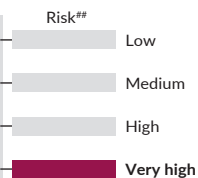
Benchmark Return

Actual Return

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.)

301.97

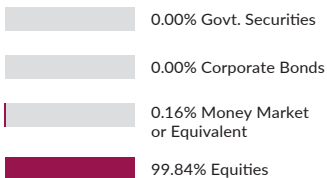
Inception Date

02/09/2024

Fund Management Charge

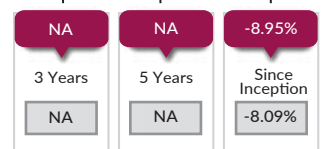
1.25%

Asset Allocation



Benchmark - NIFTY 500 Momentum 50 Index

CAGR



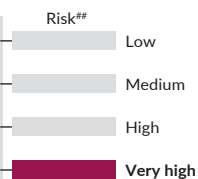
Benchmark Return

Actual Return

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.)

161.07

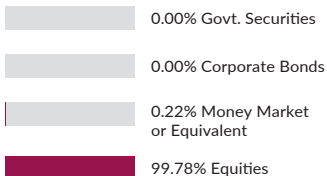
Inception Date

18/11/2024

Fund Management Charge

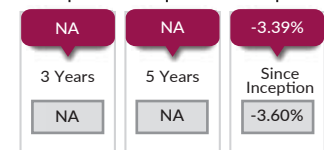
1.25%

Asset Allocation



Benchmark - NSE Nifty 500 Multicap Momentum Quality 50 Index

CAGR



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%

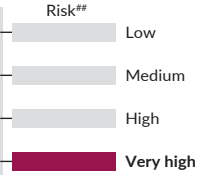
*The 'Morningstar Rating' is a quantitative assessment of a fund's past performance-both return and risk-as measured from one to five stars, with one (1) being the lowest and five (5) being the best.

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.

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.)

166.51

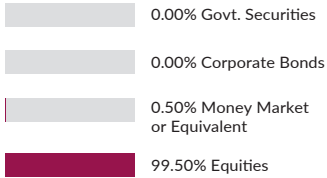
Inception Date

17/01/2025

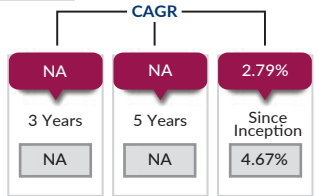
Fund Management Charge

1.25%

Asset Allocation



Benchmark - Sustainable Yield Index

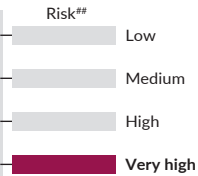


Benchmark Return Actual Return

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.)

79.41

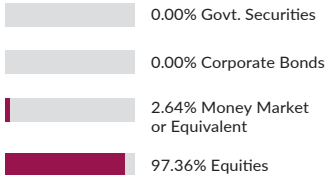
Inception Date

21/03/2025

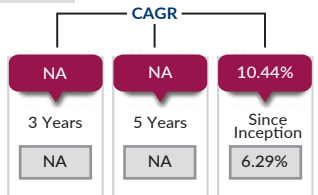
Fund Management Charge

1.25%

Asset Allocation



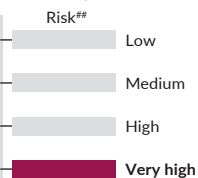
Benchmark - Nifty 500 Index



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.)

83.64

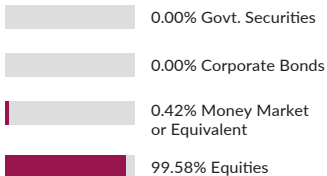
Inception Date

05/06/2025

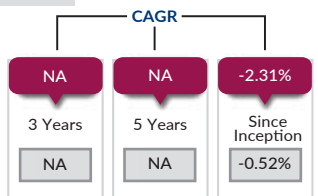
Fund Management Charge

1.25%

Asset Allocation



Benchmark - NSE Nifty 500 Multifactor MQVLv 50 Index

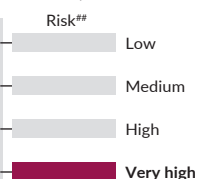


Benchmark Return Actual Return

Nifty 500 Multifactor 50 Index Pension Fund (SFIN: ULIF03523/06/25PENS MULFAC104)

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.)

35.95

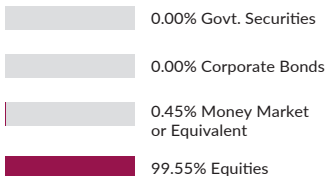
Inception Date

16/7/2025

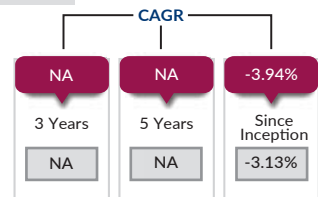
Fund Management Charge

1.35%

Asset Allocation



Benchmark - NSE Nifty 500 Multifactor MQVLv 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%

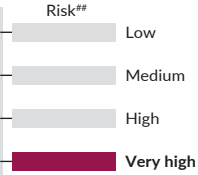
[#]The 'Morningstar Rating' is a quantitative assessment of a fund's past performance-both return and risk-as measured from one to five stars, with one (1) being the lowest and five (5) being the best.

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.

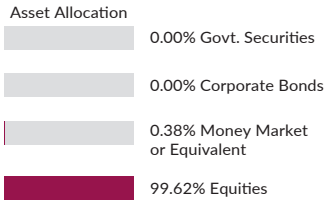
BSE 500 Value 50 Index Fund (SFIN: ULIF03623/07/25BSEVALUEIN104)

Nature of Fund

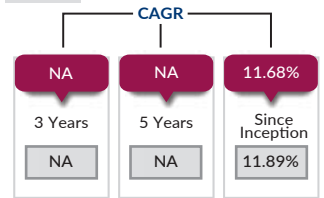
An open-ended passive equity index investing in a 50-stock portfolio selected based Value parameters.



AUM (in Rs. Cr.)	154.04	Inception Date	11/08/2025	Fund Management Charge	1.25%
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Benchmark - BSE 500 Enhanced Value 50 Index

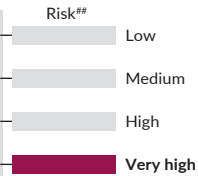


Benchmark Return Actual Return

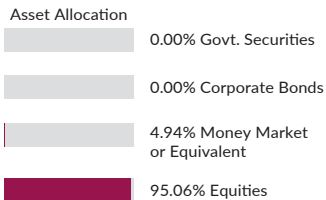
India Consumption Opportunities (SFIN: ULIF03807/10/25INDIACONSU104)

Nature of Fund

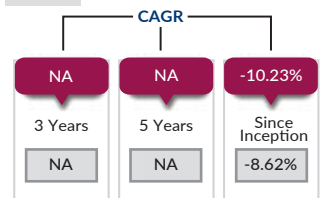
An equity-oriented scheme investing in companies operating in the consumption sector and its related or allied industries



AUM (in Rs. Cr.)	41.29	Inception Date	27/10/2025	Fund Management Charge	1.25%
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Benchmark - Nifty Consumption Index

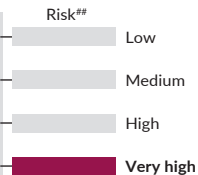


Benchmark Return Actual Return

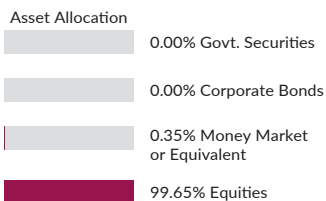
BSE 500 Dividend Leaders 50 Index Fund (SFIN: ULIF03907/11/25BSEDIVLEAD104)

Nature of Fund

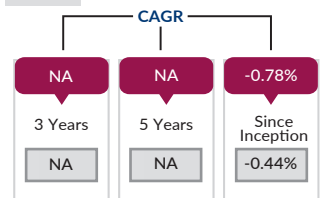
The objective of the fund is to invest in a basket of stocks drawn from the constituents of BSE 500 Dividend leaders 50 Index.



AUM (in Rs. Cr.)	115.14	Inception Date	23/11/2025	Fund Management Charge	1.25%
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Benchmark - BSE 500 Dividend leaders 50 Index

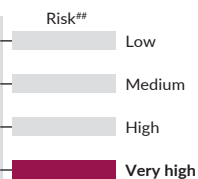


Benchmark Return Actual Return

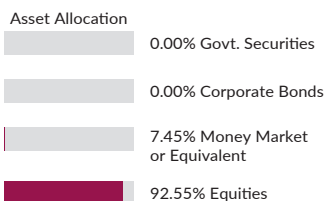
High Growth Fund II (SFIN: ULIF04117/12/25HIGHGROWTH104)

Nature of Fund

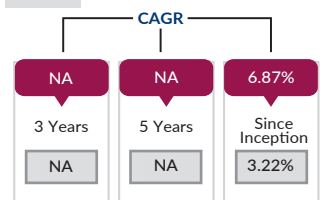
An open ended equity fund with a focus on Mid Caps



AUM (in Rs. Cr.)	201.23	Inception Date	16/01/2026	Fund Management Charge	1.35%
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Benchmark - NSE Nifty Midcap 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%

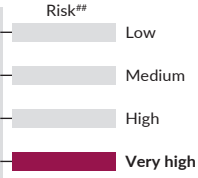
*The 'Morningstar Rating' is a quantitative assessment of a fund's past performance-both return and risk-as measured from one to five stars, with one (1) being the lowest and five (5) being the best.

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

Nature of Fund

An open ended equity fund with focus on large caps



AUM (in Rs. Cr.)

41.08

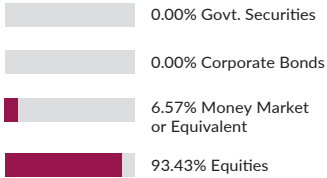
Inception Date

24/12/2025

Fund Management Charge

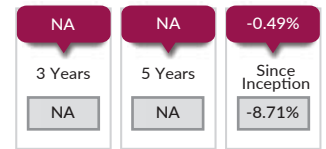
1.35%

Asset Allocation



Benchmark - NSE Nifty 50

CAGR



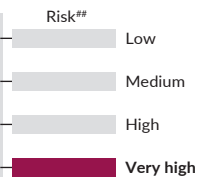
Benchmark Return

Actual Return

Diversified Equity Fund II (SFIN: ULIF04317/12/25DIVIEQUITY104)

Nature of Fund

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



AUM (in Rs. Cr.)

17.95

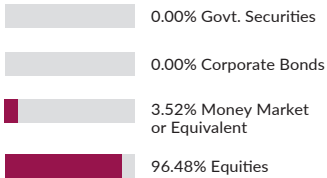
Inception Date

24/12/2025

Fund Management Charge

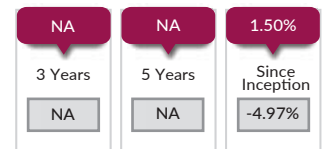
1.35%

Asset Allocation



Benchmark - NSE Nifty 200

CAGR



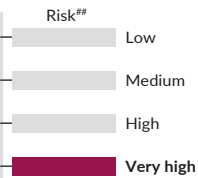
Benchmark Return

Actual Return

BSE Dividend Stability Index Fund (SFIN: ULIF04607/05/26BSEDIVSTAB104)

Nature of Fund

An open ended equity index fund that invests in large cap companies which have a historical track record of stable and sustainable dividend payments



AUM (in Rs. Cr.)

33.73

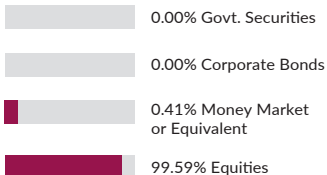
Inception Date

5/6/2026

Fund Management Charge

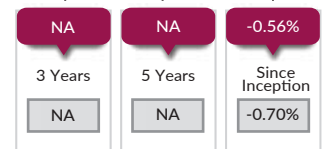
1.35%

Asset Allocation



Benchmark - BSE Dividend Stability Index

CAGR



Benchmark Return

Actual Return

BHAROSA TUM HO



*Individual Death Claims Paid Ratio as per Annual Audited Financials for FY 25-26, Claims Paid Ratio rounded off to the nearest single decimal figure. ^^The "3 Click Claim Process" refers to the three primary CTAs in the digital claims journey. Additional verification, documentation, or other steps may be required depending on the claim | *As per financials closed on 30th June 2026.

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

LIFE INSURANCE COVERAGE IS AVAILABLE IN THIS PRODUCT.

*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.

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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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IRDAI Regn. No. - 104

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- Public receiving such phone calls are requested to lodge a police complaint