UTI Mutual Fund

Haq, ek behtar zindagi ka.

Bringing all sector leaders together.

UTI BSE India Sector Leaders ETF
UTI BSE India Sector Leaders Index Fund

NFO Period: 31st Aug - 11th Sept, 2026

This visual has been created using AI.

UTI Mutual Fund | Regn.No. - MF/048/03/01

The rule of relevance keep changing

UTI Mutual Fund

PAYMENTS Cash	UPI
SHOPPING Stores	E-commerce
ENTERTAINMENT TV	OTT
MOBILITY Oil, Gas	Electronic batteries
BANKING Branch Banking	Mobile Banking

Where do we see leaders tested by change, again & again

At the FIFA World Cup - Same contenders. Different outcomes.

UTI Mutual Fund

Year 1982–2026 | 12 tournaments | 18 Different top 4 nations

Country	Wins	Finals	Top-4 Appearances
Germany*	2	5	7
France	2	4	7
Argentina	2	5	5
Brazil	2	3	4
Italy	2	3	4
Spain	2	2	2
Netherlands	—	1	3
Croatia	—	1	3
England	—	—	3
Belgium	—	—	2

~31 countries participated on average in each World Cup

Yet only 6 nations won across the 12 tournaments

Each of these winners lifted the trophy twice

New leaders emerge, while some continue to stay ahead through change

Source: fifa.com

*West Germany in 1982, 1986 and 1990. Other countries reaching the Top 4 <2 times: Poland, Sweden, Bulgaria, Turkiye , South Korea , Portugal ,Uruguay , Morocco

Consistency meets Change

Leadership balance

CONSISTENCY	CHANGE
Upholding commitments	Anticipating shifts
Maintaining standards	Adapting Strategy
Delivering Consistently	Capturing New opportunities

The above balance is supported by strengths built over time

What lies behind this balance?

Years of preparation » » 90 minutes of visibility

Talent pipeline	Strong back-up options	Reading the game	Consistent execution
Next-generation talent ready before it is needed	Strong players ready to step in when needed	Changing approach during pressure	Delivering its best, match after match

In markets too, staying ahead is built on underlying strengths

The “MOAT” behind market leadership

UTI Mutual Fund

M – **Market Trust**
Brand + Customer preference

O – **Operating Scale**
Size, efficiency & financial strength

A – **Access Advantage**
Distribution, network & customer reach

T – **Technology & Innovation**
Capability to respond to changing needs

The ingredients for leadership may differ, depending on the sector

Different Sectors. Different MOATs.

Financial Services	IT	Telecomm	Consumer Durables	Healthcare
Investor trust	Client relationships	Network coverage	Brand strength	Product portfolio
Balance sheet	Delivery capability	Subscriber base	Distribution reach	R&D capability
Distribution	Digital expertise	Capital investment	Pricing power	Regulatory track record

The market keeps testing which strengths will lead next

Can an investor own leadership without constantly chasing it?

Presenting

BSE India Sector Leaders Index*

"Built on Leadership. Designed for Change"

**Product of BSE Index Services Pvt. Ltd*

BSE India Sector Leaders Index@ - Construction approach

Universe

BSE 500 TRI

Selection

- Top 3 stocks from every sector based on 6M daily average market cap
- Existing stocks are retained till they continue to be in the top 5 ranked by full market cap in each sector

Weighing

- Free Float Market Cap weighted
- Stock weights :
  - Cap 5%
  - Floor 1%

Rebalancing

Semi-annual

June & December

@Product of BSE Index Services Private Limited

BSE India Sector Leaders Index* - Portfolio

Own India's Sector Leaders Through One Portfolio

Broader Reach. Lower Concentration.

UTI Mutual Fund

Sector	BSL	N50	B500
Financial Services	14.3%	36.2%	30.4%
IT	7.4%	8.4%	6.5%
Telecom	7.2%	5.4%	3.8%
Oil & Gas	6.8%	9.7%	7.1%
Construction	6.5%	4.1%	2.8%
Auto	6.0%	7.1%	7.6%
FMCG	5.6%	5.7%	5.6%
Healthcare	4.3%	4.8%	7.3%
Consumer Durables	4.3%	2.9%	3.0%
Consumer Services	4.2%	2.9%	3.9%
Power	3.9%	2.6%	3.5%
Metals & Mining	3.7%	4.5%	3.8%
Capital Goods	3.6%	1.2%	7.2%
Realty	3.6%	-	1.2%
Services	3.5%	2.2%	2.0%
Construction Materials	3.4%	2.3%	2.0%
Diversified	3.2%	-	0.1%
Media & Entertainment	3.1%	-	0.1%
Textiles	2.9%	-	0.3%
Chemicals	2.9%	-	2.0%

Parameters	BSL	N50	B500
Top 3 Sector weights	28.8%	54.2%	45.3%
Weight beyond top 3 sectors	71.2%	45.8%	54.7%
Sectors coverage (#)	20	15	20

~71% of BSL lies beyond its Top 3 sectors, with exposure across 5 more sectors than the Nifty 50 (~16%)

BSL:BSE India Sector Leaders TRI, N50:NIFTY 50TRI, B500: BSE 500 TRI,
Source: BSE Indices. *Data as of 31st July 2026. The sector(s)/stock(s)/issuer(s) mentioned above do not constitute any research report/recommendation and the schemes may or may not have any future position in these sector(s)/stock(s)/issuer(s).

Top 3 Leaders contribution in BSE 500 sectors

B500 Sectors	No of Companies	Top 3 BSL companies contribution		
	B500	Market Cap	Sales	PAT
Financial Services	97	28%	25%	32%
Capital Goods	66	21%	20%	24%
Healthcare	45	27%	21%	27%
Automobile and Auto Components	37	37%	31%	51%
Fast Moving Consumer Goods	31	47%	31%	53%
Consumer Services	30	43%	47%	46%
Information Technology	27	54%	59%	67%
Chemicals	27	41%	13%	27%
Oil, Gas & Consumable	19	70%	62%	64%
Consumer Durables	19	59%	41%	51%
Power	17	41%	48%	54%
Metals & Mining	16	43%	33%	33%
Construction	13	81%	72%	77%
Realty	12	55%	43%	59%
Services	12	66%	43%	57%
Construction Materials	12	71%	73%	78%
Telecommunication	8	86%	76%	55%
Textiles	6	71%	45%	90%
Media, Entertainment & Publication	4	65%	80%	86%
Diversified	3	100%	100%	100%
Overall		43%	42%	45%

Leaders can capture significant part of the economic weight within sectors

*Data from Ace Equity, for the FY 2026. The sector(s)/stock(s)/issuer(s) mentioned above do not constitute any research report/recommendation and the schemes may or may not have any future position in these sector(s)/stock(s)/issuer(s). Cells are highlighted in green where contribution of BSL stocks is >50%

The best of each sector, across Market Caps

UTI Mutual Fund

Sector (#20)	Sector Weight	Stock 1	Weight	Stock 2	Weight	Stock 3	Weight
Financial Services	14.3%	(L) ICICI BANK	5.2%	(L) HDFC BANK	4.7%	(L) SBI	4.3%
IT	7.4%	(L) INFY	4.0%	(L) TCS	2.4%	(L) WIPRO	1.0%
Telecom	7.2%	(L) AIRTEL	5.2%	(M) BHARTI HEXA	1.0%	(L) INDUS TOWERS	0.9%
Oil & Gas	6.8%	(L) RIL	4.9%	(L) IOC	1.0%	(L) ONGC	0.9%
Construction	6.5%	(L) L&T	4.7%	(M) RVNL	0.9%	(S) IRB INFRA	0.9%
Auto	6.0%	(L) MAH & MAH	3.1%	(L) MARUTI SUZUKI	1.9%	(L) BAJAJ AUTO	1.1%
FMCG	5.6%	(L) ITC	2.7%	(L) HUL	1.9%	(L) NESTLE INDIA	1.0%
Healthcare	4.3%	(L) SUN PHARMA	2.2%	(L) DIVIS LAB	1.1%	(L) CIPLA	1.0%
Consumer Durables	4.3%	(L) TITAN	2.0%	(L) ASIAN PAINTS	1.3%	(M) HAVELLS INDIA	1.0%
Consumer Services	4.2%	(L) ETERNAL	2.2%	(L) TRENT	1.0%	(L) AVENUE SUPERMARTS	0.9%
Power	3.9%	(L) NTPC	1.7%	(L) PGC	1.3%	(L) ADANI GREENS	0.9%
Metals & Mining	3.7%	(L) TATA STEEL	1.6%	(L) ADANI ENT	1.1%	(L) HINDUSTAN ZINC	0.9%
Capital Goods	3.6%	(L) BHARAT ELECT	1.4%	(L) TATA MOTORS	1.1%	(L) HAL	1.0%
Realty	3.5%	(M) LODHA DEVLP	1.4%	(L) DLF	1.1%	(M) OBEROI REALTY	1.1%
Services	3.5%	(L) ADANI PORTS	1.3%	(M) CONTAINER CORP	1.1%	(L) INTERGLOBE AVIATION	1.1%
Construction Materials	3.4%	(L) ULTRATECH	1.4%	(L) AMBUJA	1.0%	(L) GRASIM IND	1.0%
Diversified	3.2%	(M) GODREJ IND	1.2%	(M) 3M INDIA	1.0%	(S) DCM SHRIRAM	0.9%
Media & Ent	3.1%	(S) PVR INOX	1.1%	(S) ZEE ENTERTAIN	1.1%	(S) SUN TV NETWORK	0.9%
Textiles	2.9%	(M) PAGE INDUSTRY	1.0%	(S) TRIDENT	1.0%	(S) K.P.R.MILL	0.9%
Chemicals	2.9%	(L) PIDILITE	1.0%	(L) SOLAR IND INDIA	1.0%	(M) SRF	0.9%

Market Cap	Weight	Stocks (#)
(L) Large Cap	82.4%	43
(M) Mid Cap	10.7%	10
(S) Small Cap	6.9%	7

- Construction sector spans across all three market segments
- 5 sectors blend large and mid cap leaders
- 3 sectors (Diversified, Media, and textiles) finds their leaders entirely beyond large caps

*Data as of 31st July 2026. L - LARGECAP, M - MIDCAP, S - SMALLCAP ; M Cap classification as per AMFI Categorization of Large, Mid and Small Cap Stocks Dated 30th June 2026. Source: BSE Indices Ltd. The sector(s)/stock(s)/issuer(s) mentioned above do not constitute any research report/recommendation and the schemes may or may not have any future position in these sector(s)/stock(s)/issuer(s).

Leaders remain steady & focused over long term

AUTO	Maruti Suzuki	
CONSTRUCTION	L&T	
CONSTRUCTION MATERIALS	Ambuja Cements	
CONSUMER DURABLES	Asian Paints	
FMCG	HUL ITC	Nestlé India
FINANCIAL SERVICES	ICICI Bank	
HEALTHCARE	Cipla	Sun Pharma
IT	Infosys	TCS Wipro
MEDIA & ENTERTAINMENT	Zee Ent.	
OIL & GAS	IOC ONGC	Reliance
POWER	NTPC	
SERVICES	Container Corp	
TELECOM	Bharti Airtel	

Consistency snapshot

- **142** unique stocks featured since inception
- **20** stocks retained from first inclusion
- **50%** average weight of continuously-held stocks
- **15.5%** consistent leaders returns^
- **13.6%** Nifty 50 TRI returns^

A retained core gives the index continuity, while sectors and stocks keep evolving around it.

Not every leader changes. A few stay relevant across cycles

^ Period – 20th Jun 2005 to 31-Jul-26. The sector(s)/stock(s)/issuer(s) mentioned above do not constitute any research report/recommendation and the schemes may or may not have any future position in these sector(s)/stock(s)/issuer(s). Source: BSE Indices Ltd.

BSE India Sector Leaders Index* - Performance

*Product of BSE Index Services Pvt. Ltd

Returns – Long term

A Journey of Wealth Creation over 20+ Years

Investment Mode	Start Date	Amount Invested (₹)	Returns		Value ₹ (July 31st, 2026)		Value addition over N50
			BSL	N50	BSL	N50	
Lumpsum	20-Jun-2005	10 lakhs	**15.3%**	13.6%	**2.03 crores**	1.48 crores	**0.55 crores**
Wealth creation multiplier					**20x**	**15x**	
Monthly SIP of ₹10,000	01-Jul-2005	25 lakhs	**13.6%**	11.9%	**1.29 crores**	1.04 crores	**0.25 crores**

Two decades. 20x wealth. leaders compound wealth.

BSL:BSE India Sector Leaders TRI, N50:NIFTY 50 TRI. Source : MFI. Data as of July 31, 2026. Returns are CAGR. SIP returns are from 01-Jul-2005 and lumpsum returns from – 20th -Jun 2005. SIP returns are calculated assuming SIP of Rs.10,000 made on first day of every month. Past performance may or may not be sustained in the future and shall not be used for comparison with other investments. CAGR – Compounded Annualized Growth Rate. The figures pertain to performance of the index and do not indicate the returns/performance of the scheme. It is not possible to invest directly in Index.

Returns – Short & Medium Term

Period	Returns		Standard Deviation		Risk Adjusted Returns	
	BSL	N50	BSL	N50	BSL	N50
1 Year	-0.1%	-0.4%	13.7%	13.3%	-0.01	-0.03
3 Years	11.4%	8.6%	14.1%	13.2%	0.81	0.65
5 Years	12.5%	10.4%	14.2%	13.8%	0.88	0.76
7 Years	15.9%	13.2%	17.1%	17.7%	0.93	0.75
10 Years	13.6%	12.3%	15.8%	16.1%	0.86	0.76
Since Inception^	15.3%	13.6%	19.5%	20.7%	0.79	0.66

Longer investment horizons have seen a relatively stronger return and RAR* profile

Source : MFI, based on Total Returns Index. Data as of July 31, 2026. TRI i.e., 'Total Return Index' consider reinvestment of dividends issued by companies forming part of Index. BSL:BSE India Sector Leaders TRI, N50:NIFTY 50 TRI. Returns are CAGR. ^Since inception date of BSE India Sector leaders TRI i.e. 20th June 2005. Standard Deviation is based on the daily returns for the respective period. Past performance may or may not be sustained in the future and shall not be used for comparison with other investments. The figures pertain to performance of the index and do not indicate the returns/performance of the scheme. It is not possible to invest directly in Index.. *RAR – Risk Adjusted Returns.

Returns – Calendar Year

Period	Returns		Standard Deviation		Risk Adjusted Returns	
	BSL	N50	BSL	N50	BSL	N50
CYTD 26	-2.9%	-5.9%	16.5%	16.1%	-0.18	-0.37
CY 25	5.5%	11.9%	12.6%	11.8%	0.44	1.01
CY 24	17.8%	10.1%	15.4%	13.9%	1.16	0.73
CY 23	28.9%	21.3%	9.7%	9.8%	2.98	2.18
CY 22	3.9%	5.7%	17.0%	17.2%	0.23	0.33
CY 21	34.9%	25.6%	15.0%	15.6%	2.33	1.64
CY 20	21.3%	16.1%	27.8%	31.1%	0.77	0.52
CY 19	6.7%	13.5%	13.7%	13.7%	0.49	0.98
CY 18	-1.7%	4.6%	13.3%	12.8%	-0.13	0.36
CY 17	36.6%	30.3%	9.9%	9.0%	3.69	3.36
CY 16	6.0%	4.4%	16.0%	15.1%	0.38	0.29
CY 15	0.6%	-3.0%	16.4%	16.1%	0.04	-0.19
CY 14	36.3%	32.9%	13.9%	12.6%	2.60	2.61
CY 13	6.7%	8.1%	16.5%	18.0%	0.40	0.45
CY 12	30.3%	29.4%	14.5%	15.1%	2.09	1.95
CY 11	-23.1%	-23.8%	18.6%	20.9%	-1.24	-1.14
CY 10	19.0%	19.2%	14.5%	16.2%	1.31	1.18
CY 09	88.7%	77.6%	31.4%	34.6%	2.82	2.25
CY 08	-49.0%	-51.3%	39.6%	44.1%	-1.24	-1.16
CY 07	50.6%	56.8%	22.1%	25.3%	2.29	2.24
CY 06	48.5%	41.9%	25.2%	26.0%	1.92	1.61

Over the last 21 CYs, in comparison to Nifty 50 TRI BSL has demonstrated:

- Relatively higher return in 14 instances (67%)
- Relatively lower volatility in 13 instances (62%)
- Relatively higher RAR* in 13 instances (62%)

BSL:BSE India Sector Leaders TRI, N50:NIFTY 50TRI.
Source : MFI, based on Total Returns Index. CYTD^26 Period – Jan 01,2026 to Jul 31, 2026. Past performance may or may not be sustained in the future and shall not be used for comparison with other investments. The figures pertain to performance of the index and do not indicate the returns/performance of the scheme. It is not possible to invest directly in Index. *RAR – Risk Adjusted Returns

Returns - Daily Rolling over 19+ years

	3 Years Rolling Returns*		5 Years Rolling Returns@	
	BSL	**N50**	**BSL**	**N50**
Average Returns (%)	**14.0**	12.2	**14.1**	12.4
Max Return (%)	**35.6**	32.6	**30.6**	26.9
Min return (%)	-5.8	-5.6	-0.7	-1.0
% of times BSL outperforming	--	79%	--	88%
Average Outperformance %	--	2.6	--	1.9
Average Underperformance %	--	-1.5	--	-0.3

BSL has outperformed N50 by 79% times in a 3 year and 88% times in a 5 year period

Source: MFI. Rolling Returns with daily frequency of indices as mentioned above on 3 years & 5 Years periods respectively. *based on 4489 Observations. @based on 4001 Observations.
BSL:BSE India Sector Leaders TRI, N50:NIFTY 50TRI.
Data period: June 20, 2005 to July 31, 2026. Past performance may or may not be sustained in the future and shall not be used for comparison with other investments. The figures pertain to performance of the index and do not indicate the returns/performance of the scheme. It is not possible to invest directly in Index

Performance across Return ranges

			Average 1Y Rolling Returns %		Avg Alpha % of BSL over
Return Range of Nifty 50 TRI	No. of Instances	% of Instances	BSL	N50	N50
Less than 0%	897	18%	-13.0	-13.8	0.78
Between 0% to 20%	2422	49%	9.7	10.0	-0.27
Between 20% to 30%	701	14%	30.1	24.7	5.42
Between 30% to 40%	345	7%	39.8	34.3	5.44
More than 40%	623	12%	62.3	56.2	6.11
Total	**4988**				

WHEN MARKETS FALL

BSL cushioned declines relatively better

WHEN MARKETS ARE POSITIVE

- **BSL broadly kept pace in moderate markets**
- **Return advantage widened as markets strengthened**

BSL:BSE India Sector Leaders TRI, N50:NIFTY 50TRI. Source : MFI, based on Total Returns Index. Period considered as Jun 20, 2005 to July 31, 2026. Past performance does not guarantee future performance of the scheme. Past performance may or may not be sustained in the future and shall not be used for comparison with other investments. The figures pertain to performance of the index and do not indicate the returns/performance of the scheme. It is not possible to invest directly in Index

Performance Story - At a Glance

Compared with Nifty 50 TRI, BSL has delivered:

Relatively **better long-term** wealth creation through SIP/Lumpsum investment

Relatively **stronger returns**, backed by better risk-adjusted returns (RAR) over longer horizons (>5 yrs)

Outperformance during **14 out of 21 calendar years**

Rolling-return edge with over 1.9% average outperformance

Better downside resilience, with stronger relative returns in rising markets

BSL:BSE India Sector Leaders TRI. Past performance does not guarantee future performance of the scheme. Past performance may or may not be sustained in the future and shall not be used for comparison with other investments. The figures pertain to performance of the index and do not indicate the returns/performance of the scheme. It is not possible to invest directly in Index.

UTI Mutual Fund

Presenting

UTI BSE India Sector Leaders Index Fund

Scheme replicating **BSE India Sector Leaders Index***

UTI BSE India Sector Leaders ETF

Scheme replicating **BSE India Sector Leaders Index***

NFO opens on 31st Aug 2026 | **NFO closes on 11th Sep 2026**

*Product of BSE Index Services Pvt. Ltd

Choose the route that suits you

Same index – Choice of transaction experience

	ETFs	Index Funds
Net Asset Value (NAV)	Real Time	End of the day
Liquidity Provider@	Primarily traded through Stock Exchanges	Only by Fund
Portfolio Disclosure	Monthly	Monthly
Intraday Trading	Possible, as units are traded at real time price	Not possible as units are transacted at closing NAV
Cost effectiveness	Each investor bears their own transaction cost	Transaction costs are spread across the fund
Holding format	Demat form	Physical + Demat

@ - In case of ETFs the Scheme offers units for subscription / redemption directly with the Mutual Fund in multiple of creation unit size to Authorized Participants / Large Investors only. Investor can buy/sell ETF units in cash segment on secondary market of exchanges where it is listed in multiple of 1 unit. AMC may appoint APs for providing liquidity on exchanges. Please read scheme related documents for "creation unit size"

About UTI BSE India Sector Leaders ETF & UTI BSE India Sector Leaders Index Fund

Investment Objective:

- To provide returns that, before expenses, corresponds to the total returns of the securities as represented by the underlying index, subject to tracking error.
- However there is no assurance that the investment objective of the scheme will be achieved.

Investment Universe:

- BSE India Sector Leaders Index TRI

Investment Strategy:

- Low-cost Scheme tracking the BSE India Sector Leaders Index TRI
- Endeavor to achieve returns of the underlying index while minimizing tracking error

Key Stats

UTI Mutual Fund

UTI BSE India Sector Leaders ETF

Type of scheme	An open ended scheme replicating/tracking the BSE India Sector Leaders Total Return Index (TRI)*
Plans & Options	The Scheme does not offer any Plans/Options for investment. The scheme offers only Growth Option
Entry and Exit Load^	NIL
Minimum Application Amount	During NFO - Minimum initial investment is ₹5,000/- and in multiples of ₹1/- thereafter On the stock exchange - Minimum 1 Unit and in multiple thereof can be bought / sold in demat form at prevailing prices quoted on the NSE and on any other exchange where they are traded.
Benchmark	BSE India Sector Leaders TRI*

UTI BSE India Sector Leaders Index Fund

Type of scheme	An open ended scheme replicating/tracking BSE India Sector Leaders Total Return Index (TRI)*
Plans & Options	The Scheme offers following Plans: Regular Plan and Direct Plan Both the Plans offer only Growth Option.
Entry and Exit Load^	NIL
Minimum Application Amount	Minimum amount of investment during NFO and On an Ongoing basis under all Plans and Options • Minimum initial investment amount is Rs. 1,000/- and in multiples of Re.1/- thereafter. • Subsequent minimum investment amount under a folio is Rs.1,000/- and in multiples of Re.1/- thereafter with no upper limit. Minimum SIP Amount - The minimum SIP amount for Daily, Weekly and Monthly SIP is Rs.500/- and in multiples of Re.1/- thereafter. The minimum SIP amount for Quarterly SIP is Rs. 1,500/- and in multiples of Re.1/- thereafter
Benchmark	BSE India Sector Leaders TRI*

*Product of BSE Index Services Pvt. Ltd.

^ # In terms of para provision no. 11.7.1 of para 11.7 of SEBI Master Circular for Mutual Funds, no entry load will be charged by the Scheme to the investors.

Who should invest?

Investors seeking to

- Access leaders across sectors
- Go beyond market-cap labels
- Keep pace with changing markets
- Follow a rules-based approach
- Diversify across the economy
- Build wealth over the long term

Past performance may or may not be sustained in the future and shall not be used for comparison with other investments.

UTI's Edge in Passive Funds

UTI Mutual Fund: A Trusted Passive Partner

UTI Mutual Fund

Track Record
Low Tracking error & Tracking Difference

Scale
One of the largest Asset Manager in the category with **AuM of INR 1,90,541 crs. across 31 passive funds**

System & Processes
Creation–redemption mechanism designed to support liquidity

Experience
Managing passive funds for **over two decades**

Cost Structure
Aimed at maintaining Competitive Expense Structure across passive offerings

Source : MFI as on July 31, 2026.

About the Fund Managers

Sharwan Kumar Goyal - Fund Manager

He is Head – Passive, Arbitrage and Quant Strategies. He is a CFA Charter holder from CFA Institute, USA and also holds a Post-graduate degree in Management (MMS) from Welingkar Institute of Management Development & Research, Mumbai. He began his career with UTI Mutual Fund in June 2006 and has over 20 years of experience in Risk Management, Equity Research and Portfolio Analysis.

Ayush Jain – Assistant Fund Manager

He is a Associate Vice President and designated as Assistant Fund Manager at UTI AMC Ltd. He is a Chartered Accountant holding charter from Institute of Chartered Accountants of India. He began his career with UTI AMC Ltd in April, 2018 and has over 7 years of experience in Equity Fund Management, Equity Research, Equity Portfolio Analysis & Portfolio Management Services.

Lokesh Kulthia – Assistant Fund Manager

He is Assistant Fund Manager & AVP – Quant & Passive Strategies. He holds an MBA in Finance, a PGPFM from NSE Academy, and an Executive Program in Algorithmic Trading from QuantInsti. He joined UTI AMC in 2019 and moved to the Investments team in 2021. With over five years of research experience, he currently manages Passive and Quantitative Strategies, focusing on index-based mandates and rules-driven portfolio construction.

For returns of other schemes managed by fund manager refer to : https://www.utimf.com/statutory-disclosures/performance-fund-manager-wise

Product Label

UTI BSE India Sector Leaders Exchange Traded Fund

(An open ended scheme replicating/tracking the BSE India Sector Leaders Total Return Index (TRI)

This product is suitable for investors who are seeking*:	Scheme Risk-o-meter: Fund : UTI BSE India Sector Leaders Exchange Traded Fund	Benchmark Risk-o-meter: BSE India Sector Leaders TRI #
• Returns that are commensurate (before fees and expenses) with the performance of the BSE India Sector Leaders (TRI), over long term, subject to tracking error. • Investment in equity securities covered by the BSE India Sector Leaders (TRI)		
* Investors should consult their financial advisers if in doubt about whether the product is suitable for them		

UTI BSE India Sector Leaders Index Fund

(An open ended scheme replicating/tracking BSE India Sector Leaders Total Return Index (TRI))

This product is suitable for investors who are seeking*:	Scheme Risk-o-meter: Fund : UTI BSE India Sector Leaders Index Fund	Benchmark Risk-o-meter: BSE India Sector Leaders TRI #
• Returns that are commensurate (before fees and expenses) with the performance of the BSE India Sector Leaders (TRI), over long term, subject to tracking error. • Investment in equity securities covered by the BSE India Sector Leaders (TRI)		
* Investors should consult their financial advisers if in doubt about whether the product is suitable for them		

Product labelling assigned during the New Fund Offer (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. #Based on the Index Composition as on the date of NFO

MUTUAL FUND INVESTMENTS ARE SUBJECT TO MARKET RISKS, READ ALL SCHEME RELATED DOCUMENTS CAREFULLY.

Disclaimer

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