

Company – Executive Briefing

1. Executive Summary:

UTI Asset Management Company is one of India's leading and oldest asset management firms, established by the Government of India in 1963, with over 60 years of experience in wealth creation. It specializes in managing a diverse range of investment solutions, including mutual funds, portfolio management services, and retirement solutions. The company serves a broad base of individual and institutional investors, leveraging its legacy and a strong focus on digital services and investor education.

2. Key Offerings & Business Segments:

Mutual Funds: Comprehensive offerings across Equity (Flexi Cap, Large Cap), Debt (Corporate Bond, Money Market), Index (Nifty 50, Nifty Next 50), Hybrid (Multi Asset Allocation, Aggressive Hybrid), ETFs, Solution Oriented Funds, and Liquid Funds.

Portfolio Management Services (PMS): Tailored investment management for specific client needs.

National Pension Scheme (NPS): Retirement planning solutions.

Alternative Investment Funds (AIFs): Specialized investment vehicles.

Retirement Solutions: Dedicated products and planning tools for retirement.

3. Strategic Direction & Initiatives:

Digital Transformation: Enhancing investor experience through "new age" goal planning, tracking, and accelerating tools, digital services for account management, and online transaction capabilities (SIP, Lumpsum, Switch, Redemption).

Investor Education: Providing extensive learning resources for all investor levels (Beginner, Intermediate, Advanced) through articles, blogs, market insights, and interactive tools like calculators and "UTI Play."

Customer Security & Vigilance: Actively warning the public against fake apps and WhatsApp groups, emphasizing the importance of engaging only with official channels to protect investors.

Comprehensive Goal Planning: Offering integrated tools and solutions for specific financial goals such as retirement, children's career planning, emergency planning, and tax planning.

4. Market Positioning & Target Audience:

UTI Mutual Fund is positioned as an established, trustworthy leader in the Indian asset management sector, leveraging its long history and government backing. Its primary target audience includes individual retail investors seeking diverse mutual fund options and goal-based planning, as well as

institutional investors requiring portfolio management and retirement solutions.