Company – Executive Briefing

1. Executive Summary:

UTI Mutual Fund is a well-established Indian asset management company with over 60 years of experience, focused on helping investors create wealth. It offers a comprehensive suite of mutual fund products across equity, debt, hybrid, and index categories, alongside other investment solutions like NPS, AIFs, and PMS. The company emphasizes a digitally-driven platform for investment and investor services, catering to a broad base of retail and institutional clients.

2. Key Offerings & Business Segments:

Mutual Funds: Equity Funds (e.g., Flexi Cap, Large Cap), Debt Funds (e.g., Corporate Bond, Money Market), Index Funds (e.g., Nifty 50, Nifty Next 50), Hybrid Funds (e.g., Multi Asset Allocation, Aggressive Hybrid), and Solution-Oriented Funds.

Other Investment Businesses: UTI International, Alternative Investment Funds (AIFs), National Pension Scheme (NPS), and Portfolio Management Services (PMS).

Goal-Based Solutions: Specific planning tools and schemes for Retirement, Children’s Career, Emergency, and Tax Planning.

Digital Services: Online investment (SIP, Lumpsum), digital KYC, account statements, and various portfolio management tools.

3. Strategic Direction & Initiatives:

Digital Transformation: Focus on providing a "complete new way" to explore funds with features like watchlists, scheme packs, and "add to cart," alongside comprehensive "all digital services for your investment account."

Goal-Oriented Investing: Emphasis on "new age goal planning, tracking and accelerating" through various calculators and planning tools.

Investor Education: Providing extensive learning resources categorized by expertise level (Beginner, Intermediate, Advanced) including blogs, articles, market insights, and tax ready reckoners.

Broadened Reach: Engaging with Investors, Distributors, AMC Shareholders/Investors, and specifically supporting NRI and Corporate Investors.

4. Market Positioning & Target Audience:

UTI Mutual Fund positions itself as a long-standing, trusted financial partner, leveraging over six decades of experience in wealth creation. It targets a diverse audience including individual retail investors, non-resident Indian (NRI) investors, corporate investors, and distributors, aiming to provide accessible, digitally-enabled investment solutions for various financial goals.