BALANCED ADVANTAGE FUNDS

TYPICAL INVESTOR CONCERNS



WHAT IS A BALANCED ADVANTAGE FUND (BAF)?

- A hybrid fund which dynamically manages the equity and debt exposure or uses equity arbitrage to hedge portfolio based on prevailing market conditions.
- When equity valuations look attractive, BAF increases equity exposure.
- When the equity valuations seem expensive BAF reduces equity allocation or hedges the equity portfolio.
- To maintain the equity status, funds may use the arbitrage strategy to reduce the net long equity positions

BALANCED ADVANTAGE FUNDS ARE THE ANSWER TO INVESTOR CONCERNS

- Follows asset allocation and rebalancing
- Aligns with changing market conditions
- Allocation to equities go up when the markets dip and vice versa
- Fund manager rebalances portfolio to suits market condition inline with investment objective of the scheme



An Investor Education & Awareness Initiative of Tata Mutual Fund

TATA MUTUAL FUND

DISCLAIMER

- To know more about KYC documentation requirements and procedure for change of address, phone number, bank details etc., please visit : https://www.tatamutualfund.com/investor-education.
- Please deal only with registered Mutual Funds, details of which can be verified on the SEBI website under 'Intermediaries / Market infrastructure institutions.
- All complaints regarding Tata Mutual Fund may be directed to service@tataamc.com and/ or https://www.scores.gov.in (SEBISCORES portal)
- Nomination is advisable for all folios opened by an individual especially with sole holding as it facilitates an easy transmission process.
- This communication is a part of investor education and awareness initiative of Tata Mutual Fund.

DESH KARE NIVESH
AN INVESTOR EDUCATION INITIATIVE BY TATA MUTUAL FUND

Mutual Fund investments are subject to market risks, read all scheme related documents carefully.