APEX SIF
Powered by Aditya Birla Sun Life Mutual Fund

Built for every **market terrain.**

A long-short strategy designed to adapt across changing market conditions.

Introducing

APEX EQUITY LONG-SHORT FUND

Markets rise, decline, or move sideways. The Apex Equity Long-Short Fund aims to capitalise on opportunities in every market environment through a long portfolio focused on growth, a short portfolio that helps manage market exposure, and active stock selection that seeks to generate returns independent of market direction. The objective is long-term capital appreciation with relatively lower volatility than the Nifty 500 TRI.

HOW IS THE PORTFOLIO BUILT?

A multi-signal framework decides net equity exposure.
The strategy blends three inputs - fundamentals, quant-based signals and option positioning - into one dynamic view of how much net equity to hold and when to lean long or short.

Core long portfolio (~50%)
High-quality businesses selected to drive long-term compounding - benchmark leaders, structural growth businesses, early recovery opportunities, long-term value ideas.

Opportunistic long portfolio (~40%)
Focused on shorter-duration alpha opportunities arising from identifiable business catalysts including product launches, regulatory changes, market share gains etc.

Special situations (~10%)
Selective participation in unique opportunities arising through corporate actions and events.

Dynamic short strategy (up to 25% unhedged derivative)
Hedges the core long portfolio, captures stock-specific short-selling downside opportunities and manage overall market exposure. Net equity exposure can range from −25% to 100%.

SEBI Registration No. MF/020/94/8

HOW THE PORTFOLIO IS POSITIONED UNDER VARYING SCENARIOS?

Market Scenario	Core Long	Opportunistic Long-Short	Special Situations	Aim
Bull Market	Higher Exposure	Long bias	High	Capture market upside
Flat Market	Moderate Exposure	Options strategy + Derivatives	Medium	Use derivatives strategies to generate alpha
Bear Market	Hedged Portfolio	Short bias	Low	Reduce drawdown

Please refer to the SID for further detailed methodology.

This flexibility allows the strategy to seek alpha across market environments while actively managing overall portfolio risk.

WHY INVEST IN APEX EQUITY LONG-SHORT FUND?

Potential growth with relatively lower volatility
Active equity participation, with the objective of achieving lower portfolio volatility than the Nifty 500 TRI.

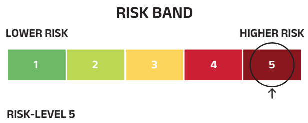
More than one source of return
Core long, opportunistic and special situation positions, managed as a single strategy.

Downside actively managed
Net equity exposure can range from −25% to 100%, adjusted in line with the fund manager's assessment of market conditions.

Specialised team
Managed by professionals with experience across equity, derivatives and long-short strategies.

NFO Period: 10th - 24th August, 2026

Apex Equity Long-Short Fund
(An open ended equity investment strategy investing in listed equity and equity related instruments including limited short exposure in equity through derivative instruments)

This product is suitable for investors who are seeking*	Risk-band	Benchmark Risk-band (NIFTY 500 TRI)
• Capital appreciation over long term • An open ended equity investment strategy investing in listed equity and equity related instruments including limited short exposure in equity through derivative instruments.		

*Investors should consult their financial advisers if in doubt about whether the product is suitable for them.

The above product labelling assigned during the New Fund Offer (NFO) is based on internal assessment of the characteristics of the investment strategy or model portfolio and the same may vary post NFO when the actual investments are made.

Investments in Specialized Investment Fund involves relatively higher risk including potential loss of capital, liquidity risk and market volatility. Please read all investment strategy related documents carefully before making the investment decision.