SCHEME SUMMARY DOCUMENT

Scheme Code	002
Fund Name	UTI Unit Linked Insurance Plan
Option Names (Regular & Direct)	Regular Plan-10 Years Plan, Regular Plan-15 Years Plan, Direct Plan-10 Years Plan, Direct Plan-15 Years Plan,
Fund Type	An Open-ended tax saving cum insurance scheme
Riskometer (at the time of the launch)	High
Riskometer (as on date)	Moderately High
Category as per SEBI Categorisation Circular	Hybrid - Dynamic Asset Allocation or Balanced Advantage
Potential Risk Class (as on date)	Not Applicable
Description, Objective of the Scheme	Investment objective of the scheme is primarily to provide return through growth in the NAV or through dividend distribution (IDCW) and reinvestment thereof. Amounts collected under the scheme shall generally be invested as follows: (a) Not less than 60% of the funds in debt instruments with low to medium risk profile. (b) Not more than 40% of the funds in equities and equity related instruments
Stated Asset Allocation	Debt: 60-100% (Low to Medium) Equity: 0-40% (Medium to High)
Face Value	10
NFO Open Date	Not Available
NFO Close Date	Not Available
Allotment Date	01/10/1971
Reopen Date	Not Available
Maturity Date (For close-ended funds)	Not Applicable
Benchmark (Tier 1)	Nifty 50 Hybrid Composite Debt 50:50 Index
Benchmark (Tier 2)	Not Applicable

SCHEME SUMMARY DOCUMENT

Fund Manager 1 - Name	Mr. Sunil Patil
Fund Manager 1 - Type (Primary/Comanage/Description)	Co manage (Debt)
Fund Manager 1 - From Date	21/12/2022
Fund Manager 2 - Name	Mr. Ajay Tyagi
Fund Manager 2 - Type (Primary/Comanage/Description)	Co manage (Equity)
Fund Manager 2 - From Date	14/12/2022
Fund Manager 3 - Name	Mr. Kamal Gada
Fund Manager 3 - Type (Primary/Comanage/Description)	Co manage (Overseas)
Fund Manager 3 - From Date	18/07/2022
Fund Manager 4 - Name	Not Applicable
Fund Manager 4 - Type (Primary/Comanage/Description)	Not Applicable
Fund Manager 4 - From Date	Not Applicable
Annual Expense (Stated maximum)	Regular Plan-1.62 ; Direct Plan-0.88
Exit Load (if applicable)	2% of NAV for premature withdrawal.
Custodian	Stock Holding Corporation of India
Auditor	S. R. Batliboi & Co. LLP.
Registrar	KFin Technologies Pvt. Ltd.
RTA Code (to be phased out)	ULTYR-Regular Plan-10 Years Plan, ULFYR-Regular Plan-15 Years Plan, ULD2R-Direct Plan-10 Years Plan, ULD1R-Direct Plan-15 Years Plan,
Listing Details	Not Listed
ISINs	Not Applicable, Not Applicable, Not Applicable, Not Applicable,
AMFI Codes (to be phased out) SEBI Codes	100646-Regular Plan;120784-Direct Plan
Investment Amount Details	

SCHEME SUMMARY DOCUMENT

Minimum Application Amount	Minimum target amount under the scheme is 15000 which is required to be invested over 10/15 year period.
Minimum Application Amount in multiples of Rs.	15000
Minimum Additional Amount	Additional investment beyond the minium, the target amount cab be chosen in multiple o for participating in the 10/15 years plan
Minimum Aditional Amount in multiples of Rs.	1000,1500
Minimum Redemption Amount in Rs.	Not Applicable
Minimum Redemption Amount in Units	Not Applicable
Minimum Balance Amount (if applicable)	Not Applicable
Minimum Balance Amount in Units (if applicable)	Not Applicable
Max Investment Amount	Not Applicable
Minimum Switch Amount (if applicable)	Not Applicable
Minimum Switch Units	Not Applicable
Switch Multiple Amount (if applicable)	Not Applicable
Switch Multiple Units (if applicable)	Not Applicable
Max Switch Amount	Not Applicable
Max Switch Units (if applicable)	Not Applicable
Swing Pricing (if applicable)	Not Applicable
Side-pocketing (if applicable)	Enabled
SIP SWP & STP Details	
Frequency	SIP - Monthly (M), Quarterly (Q) SWP - Monthly,Quarterly, Half yearly, Annual STP - Monthly,Quarterly
Minimum Amount	SIP - M-500/Q-1500 SWP - M-500/Q-1500 STP - M-1000/Q-3000

SCHEME SUMMARY DOCUMENT	
In Multiple of	SIP - Re. 100 SWP - Re. 100 STP - Re. 100
Minimum Instalments	SIP - Monthly - 180, Quarterly - 60 SWP - Not Applicable STP - Monthly-180,Quarterly-60, SIP - Monthly - 120, Quarterly - 40 SWP - Not Applicable STP - Monthly-120,Quarterly-40
Dates	Any day
Maximum Amount (if any)	Not Applicable