

For HDFC Life Unit Linked Plans Only

**Fund Switch &  
Premium Redirection**

(Please use a separate request form for each policy)

*For Official Use Only*

Branch Name:

Received by:

Interaction ID:

Dt &amp; Time:

Current Day NAV Next Day NAV 

Employee Code: \_\_\_\_\_

Signature: \_\_\_\_\_



Name of the Policyholder : \_\_\_\_\_ (First Name) \_\_\_\_\_ (Middle Name) \_\_\_\_\_ (Last Name)

Proposal /Policy No: \_\_\_\_\_ E-Insurance Account No.: 

Email ID\*: \_\_\_\_\_

Contact No. \*(Off) \_\_\_\_\_ / (Res) \_\_\_\_\_ / (Mob) \_\_\_\_\_ Mobile number is preferable

\* Contact details provided herein will be updated for all future communications. For customers registered under National Do Not Call Registry, this will be considered as consent to communicate with him/her on the contact details provided herein.

| Fund Name<br>(Please mention the name of the fund(s) that you wish to switch to and/or redirect premiums) | Fund Switch<br>(current fund holdings) | Premium<br>Redirection (future premiums)* |
|---|--|---|
|   | New Percentage                         | New Percentage                            |
|   |  |   |
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|   |  |   |
| <b>Total Percentage</b> (the total % of fund allocation should be 100%)                                   | <b>100%</b>                            | <b>100%</b>                               |

**General Rules:**

1. Request for the above transactions are acceptable subject to cut-off rules followed by HDFC Standard Life Insurance Co. Ltd in accordance with IRDAI. **The current cut-off timing for accepting requests to be processed with same day NAV is 3pm IST.** 2. If Asset Allocation Option (AAO) was previously opted for, the same will be treated as withdrawn on receipt of a Fund Switch / Premium Redirection request. Once withdrawn, the AAO cannot be opted for again. 3. In case a prior unit allocation is pending, your current request will be processed on the successive working day. 4. If a Fund Switch & Top Up request is received together, Fund Switch transaction will be processed first. 5. Redirection is not applicable to single premium plans. Please check your plan for the same. 6. The future premiums received will continue to get allocated as per the original fund allocation unless a Premium Redirection request is also given to change the future fund allocation. 7. The Company reserves the right to alter the charges without prior intimation. 8. Policy servicing charges may be levied as applicable. Please refer to your policy document for details. 9. To process your fund switch request, we will first cancel all of the existing units in your policy fund(s). The proceeds from the cancelled units, after deducting the applicable charge (if any), will then be used to buy units in your chosen Fund(s).

**I confirm having read all the relevant policy provisions before making this application and having understood them and its consequences. I further confirm that the premium paid above is derived out of legitimate sources of funds. I understand and agree that all the instructions are authorised by me through this form are made under my consent and are not provided under any duress or compulsion, and HDFC Life has agreed to carry out the same on my behalf. I undertake not to raise any action or claim whatsoever against HDFC Life for any reasons thereto.**

Policy Holder's / Assignee's Name: \_\_\_\_\_ Date: \_\_\_\_\_ Place: \_\_\_\_\_

Policy holder's / Assignee's Signature: \_\_\_\_\_ **\* Assignee's details are required in case of assigned policies****Declaration to be made by a third person where:**

The life assured has affixed his/her thumb impression / has signed in vernacular / has not filled the application. I hereby declare that I have explained the contents of this application form to the life to be assured in \_\_\_\_\_ language and have truthfully recorded the answers provided to me. I further declare that the life to be assured has signed/affixed his/her thumb impression in my presence.

Declarant Name \_\_\_\_\_ Signature \_\_\_\_\_ Date: \_\_\_\_\_ Place: \_\_\_\_\_

Declarant Address: \_\_\_\_\_

**Customer Acknowledgement Copy**  **Fund Switch**  **Premium Redirection** 

Policy No: \_\_\_\_\_ Interaction ID No: \_\_\_\_\_ Policyholder name: \_\_\_\_\_

Documents accepted (specify): \_\_\_\_\_

Customer Relations Officer: \_\_\_\_\_ Date: \_\_\_\_\_ Time: \_\_\_\_\_

Branch Stamp

2 SIMPLE  
STEPS

Perform Fund Switch,  
Premium Redirection  
in just 2 simple steps

My Account - Login

Register Now!

Save your time! Go Green!!

For queries or more information:



Helpline No. **18602679999** (Local charges apply). DO NOT prefix any country code e.g. +91 or 00.



service@hdfclife.com



www.hdfclife.com



Sar utha ke jyo!

Insurance is the subject matter of the solicitation.

**HDFC Standard Life Insurance Company Limited.** In partnership with Standard Life plc . IRDAI Reg. no. 101.

**Registered Office:** Lodha Excelus, 13<sup>th</sup> Floor, Apollo Mills Compound, N.M.Joshi Marg, Mahalaxmi, Mumbai-400 011.

ARN: CS/xx/xx/xxxx

PSNE62020061314

**BWARE OF SPURIOUS PHONE CALLS AND FICTITIOUS/FRAUDULENT OFFERS**

IRDAI clarifies to public that

- IRDAI or its officials do not involve in activities like sale of any kind of insurance or financial products nor invest premiums.
- IRDAI does not announce any bonus. Public receiving such phone calls are requested to lodge a police complaint along with details of phone call, number.

**HDFC Standard Life Insurance Company Limited.** In partnership with Standard Life plc.

Insurance is the subject matter of solicitation.

Regd Off: Lodha Excelus, 13<sup>th</sup> Floor, Apollo Mills Compound, N.M.Joshi Marg, Mahalaxmi, Mumbai-400 011.

Communication Address: 11th Floor, Lodha Excelus, Apollo Mills Compound, N M Joshi Marg, Mahalaxmi, Mumbai - 400011

For any queries or assistance, please contact us at any of our touch points - Helpline number- 18602679999 (Local charges apply),

SMS- 5676727 (Charges apply), Email- service@hdfclife.com, Website - www.hdfclife.com

**Timing: Available Mon-Sat from 10 am to 7 pm** DO NOT prefix any country code e.g. +91 or 00.

HDFC Standard Life Insurance Company Limited. IRDAI Regn. No.101. CIN: U99999MH2000PLC128245



The product classification & Asset class is for reference purpose only. PLEASE DO NOT PRINT.

| Name of the Product                      | UIN        |
|--|------------|
| HDFC Unit Linked Endowment Plan          | 101L015V01 |
| HDFC Unit Linked Endowment               | 101L015V02 |
| HDFC Unit Linked Young Star Plan         | 101L019V01 |
| HDFC Unit Linked Young Star              | 101L019V02 |
| HDFC Unit Linked Young Star Plus         | 101L023V01 |
| HDFC Unit Linked Endowment Plus          | 101L024V01 |
| HDFC Unit Linked Young Star Suvidha      | 101L025V01 |
| HDFC Unit Linked Young Star Suvidha Plus | 101L026V01 |
| HDFC Unit Linked Endowment Suvidha       | 101L027V01 |
| HDFC Unit Linked Endowment Suvidha Plus  | 101L028V01 |

NOTE: The Asset class is applicable for the products mentioned above only

| Fund                   | SFIN                         | Asset Class              |                 |                               | Equity      |
|------------------------|------------------------------|--------------------------|-----------------|-------------------------------|-------------|
|                        |                              | Money Market Instruments | Public Deposits | Govt. Securities & Corp Bonds |             |
| Liquid Fund            | ULIF00102/01/04LiquidFund101 | 100%                     |                 | 0%                            | 0%          |
| Stable Managed Fund    | ULIF00720/06/07StableMgFd101 | *0-12 months             | -               | 0 - 30%                       | 0%          |
|                        |                              | *12-18 months            | -               | 50 - 100%                     | 0%          |
|                        |                              | *18-24 months            | -               | 0 - 20%                       | 0%          |
|                        |                              | *More than 24 months     | -               | 0%                            | 0%          |
| Secure Managed Fund    | ULIF00202/01/04SecureMgtF101 | 0% to 5%                 | 0% to 20%       | 75% to 100%                   | 0%          |
| Defensive Managed Fund | ULIF00302/01/04DefensiveF101 | 0% to 5%                 | 0% to 15%       | 50% to 85%                    | 15% to 30%  |
| Balanced Managed Fund  | ULIF00402/01/04BalancedMF101 | 0% to 5%                 | 0% to 15%       | 20% to 70%                    | 30% to 60%  |
| Equity Managed Fund    | ULIF00616/01/06EquityMgFd101 | 0% to 5%                 | 0% to 10%       | 0% to 40%                     | 60% to 100% |
| Growth Fund            | ULIF00502/01/04GrowthFund101 | 0% to 5%                 | 0%              | 0%                            | 95% to 100% |

\*Indicates the residual maturity of the securities / instruments in the respective fund portfolios.

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| Name of the Product                          | UIN        |
|--|------------|
| HDFC Unit Linked Enhanced Life Protection II | 101L030V01 |
| HDFC Unit Linked Endowment Plus II           | 101L031V01 |
| HDFC Unit Linked YoungStar Plus II           | 101L032V01 |
| HDFC SimpliLife                              | 101L033V01 |
| HDFC SimpliLife                              | 101L033V02 |
| HDFC SimpliLife                              | 101L033V03 |
| HDFC Unit Linked Young Star II               | 101L036V01 |
| HDFC Unit Linked Endowment II                | 101L038V01 |
| HDFC Unit Linked Endowment Winner            | 101L041V01 |
| HDFC Unit Linked Young Star Champion         | 101L042V01 |
| HDFC Young Star Super                        | 101L048V01 |
| HDFC Endowment Super                         | 101L049V01 |
| HDFC Young Star Super Suvidha                | 101L050V01 |
| HDFC Endowment Super Suvidha                 | 101L051V01 |
| HDFC Young Star Supreme Suvidha              | 101L052V01 |
| HDFC Endowment Supreme Suvidha               | 101L053V01 |
| HDFC Endowment Supreme                       | 101L058V01 |
| HDFC Young Star Champion Suvidha             | 101L059V01 |
| HDFC YoungStar Supreme                       | 101L060V01 |
| HDFC Endowment Champion Suvidha              | 101L061V01 |

NOTE: The Asset class is applicable for the products mentioned above only

| Fund                      | SFIN                         | Asset Class                                |                               |             |
|---------------------------|------------------------------|--|-------------------------------|-------------|
|                           |                              | Money Market Instruments & Public Deposits | Govt. Securities & Corp Bonds | Equity      |
| Liquid Fund II            | ULIF02208/10/08LiquidFdII101 | 100%                                       | 0%                            | 0%          |
| Stable Managed Fund II    | ULIF02308/10/08StableMFII101 | 0 - 100% (*Upto 24 Months)                 |                               | 0%          |
| Secured Managed Fund II   | ULIF02408/10/08SecureMFII101 | 0% to 25%                                  | 75% to 100%                   | 0%          |
| Defensive Managed Fund II | ULIF02508/10/08DefnsvFdII101 | 0% to 20%                                  | 50% to 85%                    | 15% to 30%  |
| Balanced Managed Fund II  | ULIF02608/10/08BalncdMFII101 | 0% to 20%                                  | 20% to 70%                    | 30% to 60%  |
| Equity Managed Fund II    | ULIF02708/10/08EquityMFII101 | 0% to 15%                                  | 0% to 40%                     | 60% to 100% |
| Growth Fund II            | ULIF02808/10/08GrwthFndII101 | 0% to 10%                                  | 0%                            | 90% to 100% |

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| Name of the Product                   | UIN        |
|---------------------------------------|------------|
| HDFC Unit Linked Pension II           | 101L039V01 |
| HDFC Unit Linked Pension Maximiser II | 101L040V01 |
| HDFC Pension Super                    | 101L047V01 |
| HDFC Pension Supreme                  | 101L055V01 |
| HDFC Unit Linked Pension Maximiser II | 101L056V01 |
| HDFC Pension Champion                 | 101L057V01 |

NOTE: The Asset class is applicable for the products mentioned above only

| Fund                      | SFIN                         | Asset Class                                |                               |             |
|---------------------------|------------------------------|--|-------------------------------|-------------|
|                           |                              | Money Market Instruments & Public Deposits | Govt. Securities & Corp Bonds | Equity      |
| Liquid Fund II            | ULIF02208/10/08LiquidFdII101 | 100%                                       | 0%                            | 0%          |
| Stable Managed Fund II    | ULIF02308/10/08StableMFII101 | 0 - 100% (*Upto 24 Months)                 |                               | 0%          |
| Secured Managed Fund II   | ULIF02408/10/08SecureMFII101 | 0% to 25%                                  | 75% to 100%                   | 0%          |
| Defensive Managed Fund II | ULIF02508/10/08DefnsvFdII101 | 0% to 20%                                  | 50% to 85%                    | 15% to 30%  |
| Balanced Managed Fund II  | ULIF02608/10/08BalncdMFII101 | 0% to 20%                                  | 20% to 70%                    | 30% to 60%  |
| Equity Managed Fund II    | ULIF02708/10/08EquityMFII101 | 0% to 15%                                  | 0% to 40%                     | 60% to 100% |
| Growth Fund II            | ULIF02808/10/08GrwthFndII101 | 0% to 10%                                  | 0%                            | 90% to 100% |

\*Indicates the residual maturity of the securities / instruments in the respective fund portfolios.

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| Name of the Product           | UIN        |
|-------------------------------|------------|
| HDFC Unit Linked Pension Plan | 101L016V01 |
| HDFC Unit Linked Pension      | 101L016V02 |
| HDFC Unit Linked Pension Plus | 101L029V01 |

NOTE: The Asset class is applicable for the products mentioned above only

| Fund                   | SFIN                         | Asset Class              |                 |                               |             |
|------------------------|------------------------------|--------------------------|-----------------|-------------------------------|-------------|
|                        |                              | Money Market Instruments | Public Deposits | Govt. Securities & Corp Bonds | Equity      |
| Liquid Fund            | ULIF00802/01/04LiquidFund101 | 100%                     |                 | 0%                            | 0%          |
| Stable Managed Fund    | ULIF01420/06/07StableMgFd101 | *0-12 months             |                 | - 0 - 30%                     | 0%          |
|                        |                              | *12-18 months            |                 | - 50 - 100%                   | 0%          |
|                        |                              | *18-24 months            |                 | - 0 - 20%                     | 0%          |
|                        |                              | *More than 24 months     |                 | - 0%                          | 0%          |
| Secured Managed Fund   | ULIF00902/01/04SecureMgtF101 | 0% to 5%                 | 0% to 20%       | 75% to 100%                   | 0%          |
| Defensive Managed Fund | ULIF01002/01/04DefensiveF101 | 0% to 5%                 | 0% to 15%       | 50% to 85%                    | 15% to 30%  |
| Balanced Managed Fund  | ULIF01102/01/04BalancedMF101 | 0% to 5%                 | 0% to 15%       | 20% to 70%                    | 30% to 60%  |
| Equity Managed Fund    | ULIF01316/01/06EquityMgFd101 | 0% to 5%                 | 0% to 10%       | 0% to 40%                     | 60% to 100% |
| Growth Fund            | ULIF01202/01/04GrowthFund101 | 0% to 5%                 | 0%              | 0%                            | 95% to 100% |

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| Name of the Product     | UIN        |
|-------------------------|------------|
| HDFC SL pension Maximus | 101L074V01 |

NOTE: The Asset class is applicable for the products mentioned above only

| Equity                   | Fund       | SFIN                         | Asset Class  | Equity   |
|--------------------------|------------|------------------------------|--|----------|
|                          |            |                              | Money Market Instruments ,Public Deposits, Govt. Securities & Corp Bonds |          |
| Pension Guarantee Fund 1 | 101L074V01 | ULIF04224/01/11PenGuaFnd1101 | 70% -100%  | 0% - 30% |

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| Name of the Product                    | UIN        |
|--|------------|
| HDFC Life Pension Super Plus           | 101L085V02 |
| HDFC Life Single Premium Pension Super | 101L086V02 |
| HDFC Life Pension Super Plus           | 101L085V01 |
| HDFC Life Single Premium Pension Super | 101L086V01 |

NOTE: The Asset class is applicable for the products mentioned above only

| Fund                           | SFIN                         | Asset Class              |                               |          |
|--------------------------------|------------------------------|--------------------------|-------------------------------|----------|
|                                |                              | Money Market Instruments | Govt. Securities & Corp Bonds | Equity   |
| Pension Super Plus Fund - 2012 | ULIF04818/06/12PenSuPls12101 | 0% - 40%                 | 40% - 100%                    | 0% - 60% |



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| Name of the Product                | UIN        |
|------------------------------------|------------|
| HDFC Wealth Maximiser Plus         | 101L034V01 |
| HDFC Unit Linked Wealth Multiplier | 101L044V01 |

NOTE: The Asset class is applicable for the products mentioned above only

| Fund                    | SFIN                         | Asset Class  | Asset Allocation |
|-------------------------|------------------------------|--|------------------|
| Money Plus Fund         | ULIF02904/08/08MoneyPlusF101 | *All debt instruments maturity less than equal to 12 months  | 0 - 30%          |
|                         |                              | *Bank deposits with maturity greater than equal to 12 months and lesser than or equal to 36 months         | 0 - 20%          |
|                         |                              | *Government Securities with maturity greater than equal to 12 months and lesser than or equal to 36 months | 40 - 100%        |
|                         |                              | *Corporate Debt with maturity greater than equal to 12 months and lesser than or equal to 36 months        | 0 - 10%          |
| Bond Opportunities Fund | ULIF03004/08/08BondOprtFd101 | Money Market Instruments   | 0 - 5%           |
|                         |                              | Public Deposits  | 0 - 15%          |
|                         |                              | Govt. Securities   | 50 - 60%         |
|                         |                              | Corporate Bonds  | 20 - 30%         |
|                         |                              | Equity   | 0%               |
| Large Cap Fund          | ULIF03204/08/08Large-CapF101 | Money Market Instruments   | 0-5%             |
|                         |                              | Equity   | 95-100%          |
| Mid Cap Fund            | ULIF03104/08/08Mid-capFnd101 | Money Market Instruments   | 0-5%             |
|                         |                              | Equity   | 95-100%          |
| Manager's Fund          | ULIF03304/08/08ManagerFnd101 | All Debt with maturity < 12 Months   | 0% - 40%         |
|                         |                              | Money Market Instruments & Public Deposits   | 0% - 25%         |
|                         |                              | Govt Securities & Corporate Bonds  | 5% - 65%         |
|                         |                              | Large Cap Equity   | 10% - 45%        |
|                         |                              | Mid Cap Equity   | 10% - 45%        |

\*Indicates the residual maturity of the securities / instruments in the respective fund portfolios.

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| Name of the Product      | UIN        |
|--------------------------|------------|
| HDFC Life Click 2 Invest | 101L100V01 |

NOTE: The Asset class is applicable for the products mentioned above only

| Fund                    | SFIN                         | Asset Class                                |                               |             |
|-------------------------|------------------------------|--|-------------------------------|-------------|
|                         |                              | Money Market Instruments & Public Deposits | Govt. Securities & Corp Bonds | Equity      |
| Balanced Fund           | ULIF03901/09/10BalancedFd101 | 0% to 20%                                  | 0% to 60%                     | 40% to 80%  |
| Income Fund             | ULIF03401/01/10IncomeFund101 | 0% to 20%                                  | 80% to 100%                   | -           |
| BlueChip Fund           | ULIF03501/01/10BlueChipFd101 | 0% to 20%                                  | -                             | 80% to 100% |
| Opportunities Fund      | ULIF03601/01/10OpprtntyFd101 | 0% to 20%                                  | -                             | 80% to 100% |
| Equity Plus Fund        | ULIF05301/08/13EquityPlus101 | 0% to 20%                                  | 0% to 20%                     | 80% to 100% |
| Diversified Equity Fund | ULIF05501/08/13DivrEqtyFd101 | 0% to 40%                                  | 0% to 40%                     | 60% to 100% |
| Bond Fund               | ULIF05601/08/13Bond Funds101 | 0% to 60%                                  | 40% to 100%                   | -           |
| Conservative Fund       | ULIF05801/08/13ConsertvFd101 | 0% to 60%                                  | 40% to 100%                   | -           |

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| Name of the Product              | Income Fund | Blue Chip Fund | Opportunities Fund | Vantage Fund | Short Term Fund | Balanced Fund |
|----------------------------------|-------------|----------------|--------------------|--------------|-----------------|---------------|
| HDFC Wealth Builder              | 101L054V01  | 101L054V01     | 101L054V01         | 101L054V01   | NA              | NA            |
| HDFC SL Crest                    | 101L064V01  | 101L064V01     | 101L064V01         | NA           | 101L064V01      | 101L064V01    |
| HDFC SL Crest                    | 101L064V02  | 101L064V02     | 101L064V02         | NA           | NA              | 101L064V02    |
| HDFC SL Youngstar Super II       | 101L065V01  | 101L065V01     | 101L065V01         | NA           | 101L065V01      | 101L065V01    |
| HDFC SL ProGrowth Super II       | 101L066V01  | 101L066V01     | 101L066V01         | NA           | 101L066V01      | 101L066V01    |
| HDFC SL ProGrowth Super II       | 101L066V02  | 101L066V02     | 101L066V02         | NA           | NA              | 101L066V02    |
| HDFC SL ProGrowth Maximiser      | 101L067V01  | 101L067V01     | 101L067V01         | NA           | 101L067V01      | 101L067V01    |
| HDFC SL ProGrowth Maximizer      | 101L067V02  | 101L067V02     | 101L067V02         | NA           | NA              | 101L067V02    |
| HDFC SL Young Star Super Premium | 101L068V01  | 101L068V01     | 101L068V01         | NA           | 101L068V01      | 101L068V01    |
| HDFC SL Young Star Super Premium | 101L068V02  | 101L068V02     | 101L068V02         | NA           | NA              | 101L068V02    |
| HDFC SL ProGrowth Flexi          | 101L072V01  | 101L072V01     | 101L072V01         | NA           | 101L072V01      | 101L072V01    |
| HDFC SL ProGrowth Flexi          | 101L072V02  | 101L072V02     | 101L072V02         | NA           | NA              | 101L072V02    |
| HDFC SL ProGrowth Plus           | 101L081V01  | 101L081V01     | 101L081V01         | NA           | 101L081V01      | 101L081V01    |
| HDFC SL ProGrowth Plus           | 101L081V02  | 101L081V02     | 101L081V02         | NA           | NA              | 101L081V02    |
| HDFC Life Smart Women Plan       | 101L082V01  | 101L082V01     | 101L082V01         | NA           | 101L082V01      | 101L082V01    |
| HDFC Life Smart Woman            | 101L082V02  | 101L082V02     | 101L082V02         | NA           | NA              | 101L082V02    |
| HDFC Life Invest Wise            | 101L083V01  | 101L083V01     | 101L083V01         | NA           | 101L083V01      | 101L083V01    |
| HDFC Life Invest wise            | 101L083V02  | 101L083V02     | 101L083V02         | NA           | NA              | 101L083V02    |

NOTE: The Asset class is applicable for the products mentioned above only

| Fund               | SFIN                         | Asset Class                                |                               |             |
|--------------------|------------------------------|--|-------------------------------|-------------|
|                    |                              | Money Market Instruments & Public Deposits | Govt. Securities & Corp Bonds | Equity      |
| Income Fund        | ULIF03401/01/10IncomeFund101 | 0% to 20%                                  | 80% to 100%                   | -           |
| Blue Chip Fund     | ULIF03501/01/10BlueChipFd101 | 0% to 20%                                  | -                             | 80% to 100% |
| Opportunities Fund | ULIF03601/01/10OpprtntyFd101 | 0% to 20%                                  | -                             | 80% to 100% |
| Vantage Fund       | ULIF03701/01/10VantageFnd101 | 0% - 40%                                   | 10% to 70%                    | 10% to 70%  |
| Short Term Fund    | ULIF03801/09/10ShortTrmFd101 | 0% to 100% (*upto 36 Months)               |                               | -           |
| Balanced Fund      | ULIF03901/09/10BalancedFd101 | 0% to 20%                                  | 0% to 60%                     | 40% to 80%  |

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