

# Sun Life Financial in *India*



With over 60 years of history in India, Sun Life Financial returned to the country in 1999 by partnering with the highly respected Aditya V. Birla Group to form the joint venture Birla Sun Life. Today, Birla Sun Life is one of the top six privately-owned life insurers in India. Through a rapidly growing distribution network, Birla Sun Life provides a full range of innovative products and services, which included the country's first unit-linked life insurance.

## Key information

Years of operation	1892-1956 1999-today: Operating as joint venture Birla Sun Life
Employees	14,020 <sup>1</sup>
Birla Sun Life advisors	154,000 <sup>2</sup>
Vice-President and Country Head	Venky Mysore
Head office location	Mumbai
Distribution channels	Birla Sun Life advisors, bancassurance and financial intermediaries

<sup>1</sup>At December 31, 2008.

<sup>2</sup>At June 30, 2009.

## Products and services

### INDIVIDUALS

We offer an array of protection and wealth accumulation products, including unit-linked insurance to meet protection, savings and retirement needs of individuals and their families.

- Accidental death and dismemberment insurance
- Children's plan insurance
- Critical illness insurance
- Health insurance
- Insurance and savings
- Mutual funds
- Non Resident Indians (NRI) investments
- Retirement planning
- Rural plans
- Wealth accumulation

### GROUPS

We provide customized solutions to meet the varied needs of organizations and their employees.

- Accidental death insurance
- Accidental death and dismemberment insurance
- Credit guard plan
- Critical illness insurance
- Group gratuity plan
- Group superannuation plan
- Total and permanent disability



## Awards and achievements

- Birla Sun Life Asset Management Company was awarded Best India Onshore Fund House by the Asian Investor 2009 Investment Performance Awards.
- Birla Sun Life Mutual Funds was awarded the following by CNBC TV18-CRISIL for 2008:
  - Best Income Scheme: Birla Sun Life Income Fund;
  - Best Income – Short Term Scheme: Birla Sun Life Short Term Fund Retail;
  - Best Gilt Scheme: Birla Sun Life Gilt Plus;
  - Debt Mutual Fund House of the Year; and
  - Mutual Fund House of the Year.
- Birla Sun Life Asset Management Company was awarded – for the second year in a row – the Mutual Fund House of the Year for 2008 by CNBC-CRISIL. This is the first time in history the Indian mutual fund industry granted the award to a company two years running.
- Birla Sun Life Asset Management Company was India's first asset management company to be awarded the ISO 9001:2000 Certification by DNV Netherlands for the quality of our investment products, investment management and customer service.

## Key strengths

- The Birla Sun Life Asset Management Company grew by 31 per cent year-on-year even while the overall industry registered a downfall of 7 per cent in the average assets under management in the past financial year.

## Additional information

- We operate a service centre in the Indian city of Gurgaon. Opened in 2006, the centre provides technology and business support to our businesses around the world.
- Parent company, Sun Life Financial Inc., is listed on the Philippine Stock Exchange (PSE), the Toronto Stock Exchange (TSX) and the New York Stock Exchange (NYSE) under ticker symbol SLF.
- The Sun Life Financial group of companies, which has total assets under management of \$397 billion\*, is a strong, well-capitalized organization with a diversified balance sheet.

\*At June 30, 2009, and reported in CDNS

## Contact information

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