



Intelligent Advisory Portfolios

NS 5TX5T

► What is NS 5TX5T?

Thematic Portfolio created with multiple themes which have potential to grow based on opportunities created as Indian Economy move to 5 Trillion dollar.

Key Features



Identify & Invest in
Multiple themes
(Ideally 4-6 Themes)



360 Degree Deductive
logic framework
& Growth in Value.



Multicap Portfolio
of 15-20 stocks

► Investment Universe, Process & Strategy

• Stock selection procedure involving broad processes

- A combination of fundamental value and quantitative triggers to create a high value portfolio with focus to deliver superior risk adjusted returns on absolute, relative and consistent basis.
- Principle of "Growth in Value" style of investing _& principle of linearity i.e- investing in businesses, where the improvement in fundamentals is linear (gradual) which gives opportunity for valuation multiple expansion, along with earnings growth.
- **Maximum allocation in a stock:** 10% while maintaining sector diversity

USP



Strategy identifies Unique themes based
opportunity in the Indian market



Strong process & bottoms up
selection methodology.

► Rebalancing Strategy

- If portfolio stocks under performs for two consecutive swings and exhibits higher volatility, that stock gets marked for Sell/Review
- Corporate governance issue in the company

► For Whom?

Investors with a high risk appetite and an investment horizon of minimum 3-5 years

► Basic Details

NO. OF STOCKS

15-25

BENCHMARK

Nifty 500

RISK

Moderate

TIME FRAME

3-5 years

RIA Narnolia®

LUMP SUM



Option: One Time Investment



Min Amount: 10 lakhs



Top Up: Min ₹100000 and multiples of ₹1000



Subscription mode: Upfront Subscription or Fixed Fee Model

Charges of NS 5TX5T

Upfront Subscription

RIA Charges: 2% p.a. (Chargeable Half Yearly at 1% for 6 months)

Brokerage: 0.50% + statutory costs

Fixed fees Model

Max Fees 1.25 lakhs

RIA Charges: 20% Performance Fees above 10% Hurdle rate (Charged quarterly) Higher water marked with Maximum Fees cap at ₹1.25 Lakh

Exit Load: 0.5%

Brokerage: 1.00% + Statutory costs

How to subscribe to Charges of NS 5TX5T Subscription through MOFSL?

Step 1:

Log in to MO Investor App > From Main menu select Invest Now
Log in to MO Investor Web > Select Help Me Invest

Step 2:

Select Intelligent Advisory Products > Select NS 5TX5T

Step 3:

Select Start SIP or Lumpsum

Step 4:

Complete KYC & Risk profiler

Step 5:

Select Subscription Model

Step 6:

RIA Generates Advice

Step 7:

You give consent & Invest In Portfolio

Scan QR Code to download  MO Investor App

Available on Android & Apple



For more information, email us - iapquery@motilaloswal.com



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