



Intelligent Advisory Portfolios

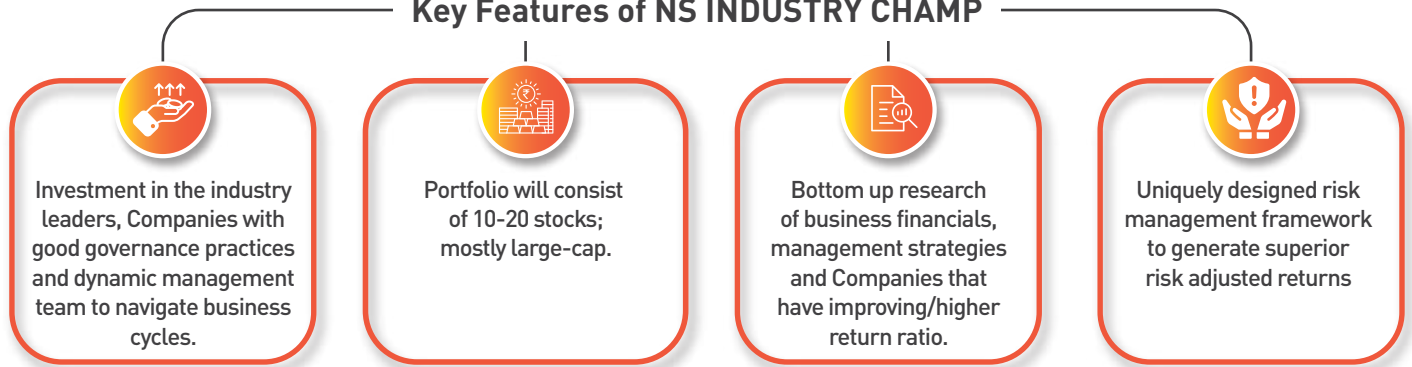
# NS INDUSTRY CHAMP



## ► What is NS INDUSTRY CHAMP?

Portfolio comprising leaders (top-3 players) of their respective industry and stocks which are showing growth in value characteristics with expected higher return ratio.

### Key Features of NS INDUSTRY CHAMP



## ► Investment Universe, Process & Strategy

### • Stock selection procedure involving broad process:

- 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:

+7% of its weight in benchmark

### Market Cap Allocation:

Large Cap	Mid Cap	Small Cap
Max 70% and Min 30%	Max 70% and Min 30%	Max 15% and Min 0%

## USP



**Strategy Focusing On Investing  
In The Industry Leaders Of Today**



**Backed By Quality Management  
Which Are Focussed On Innovation**

## ► Rebalancing Strategy

- Strictly based on fundamentals
- Corporate governance issue in the company
- If portfolio stocks underperforms to respective benchmark for two consecutive swings and exhibits higher volatility, that stock gets marked for Sell/Review

## ► For Whom?

Investors with moderate risk appetite and investment horizon of minimum 3-5 years.

## ► Basic Details

**NO. OF STOCKS**  
10-20

**BENCHMARK**  
Nifty Large  
and Mid-250





**RISK**  
Moderate

**TIME FRAME**  
3-5 years

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## LUMP SUM

-  **Option:** One Time Investment
-  **Min Amount:** 5 lakhs
-  **Top Up:** Min Rs. 50000 & in multiples of Rs. 1000
-  **Subscription mode:** Upfront Subscription or Fixed Fee Model

## Charges of NS INDUSTRY CHAMP Subscription

### Upfront Subscription

- RIA Charges** : 2% p.a (Chargeable Half yearly at 1% for 6 months)
- Brokerage** : 0.50% + statutory costs

### Fixed fees Model

- RIA Charges** : 20% performance Fees above 10% Hurdle rate (Charged quarterly) Higher water marked with **Maximum Fees cap at ₹1.25 Lakhs**
- Exit Load** : 0.5%
- Brokerage** : 1.00% + Statutory costs.

## How to subscribe to Charges of NS INDUSTRY CHAMP 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 INDUSTRY CHAMP**

**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**

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For more information, email us - [iapquery@motilaloswal.com](mailto:iapquery@motilaloswal.com)



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