



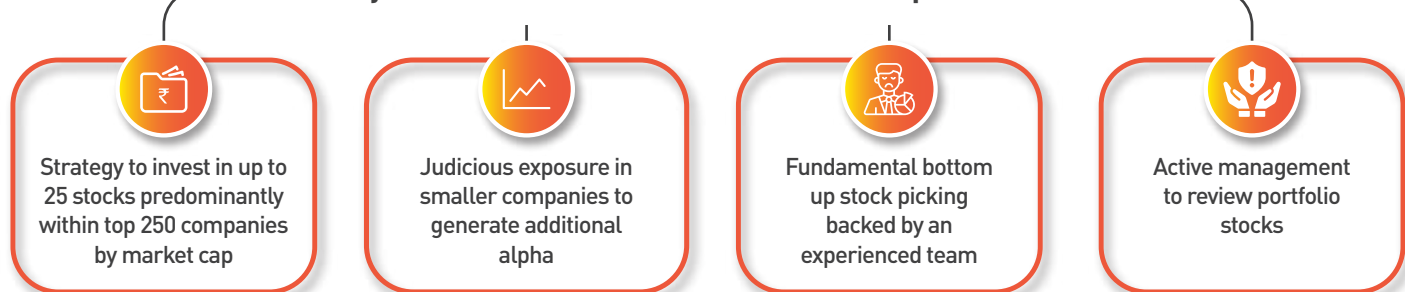
# IAP

Intelligent Advisory Portfolios

## ▶ What is Abakkus Smart Flexi Cap Portfolio?

A diversified portfolio predominantly from the universe of top 250 companies with focus on alpha generation along with stability and liquidity.

### Key Features of Abakkus Smart Flexi Cap Portfolio



## ▶ Investment Universe, Process & Strategy

- Universe comprises of top 250 companies by Market cap
- Identifying stocks through various filters based on management quality, corporate governance, sector headwinds and In-depth research and bottom up fundamental approach
- Diversified Portfolio of up to 25 companies with Risk management (Single stock exposure ideally less than 10% and max sector exposure at 30%)

## USP



Select exposure in smaller companies to generate additional alpha

## MEETS

Differentiated portfolio adhering to "MEETS" Framework

## M

### Management

Quality, capability, & track record of the management

## E

### Earnings

Quality of earnings v/s. reported numbers. Companies that can double profits in 4 years or less or where EV/EBITDA can halve in four years

## E

### Events/Trends

Stock movement because of events - Can be a buy or sell opportunity

## T

### Timing

Good Company is not necessarily a good investment if price is not right- Time frame of investment

## S

### Structural

Size of the opportunity - Consistent growth in profits

## ▶ Rebalancing Strategy

- Only when there is a better alternative or a better risk-reward in another stock based on valuations

## ▶ For Whom?

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

## ▶ Basic Details

**NO. OF STOCKS**  
Up to 25

**BENCHMARK**  
Nifty 200

**RISK**  
Aggressive

**TIME FRAME**  
3-5 years

RIA abakkus smart

# Top Stock Holding

Jindal  
Stainless

Sun  
Pharmaceutical  
Industries

Polycab  
India Ltd

Larsen &  
Toubro

Cummins  
India Ltd

The securities quoted are for illustration only and are not recommendatory.  
The current universe may or may not be a part of the future universe and may or may not be a part of all client portfolios.

## LUMP SUM

 **Option:** One Time Investment

 **Subscription mode:** Upfront Subscription

 **Withdrawal:** Full or Partial

## Charges of Abakkus Smart Flexi Cap Portfolio

### Upfront Subscription

RIA Charges: 2.5% p.a (Chargeable Half yearly at  
1.25% upfront for 6 months on daily  
average AUA)

Brokerage\*: 0.50% + statutory costs

## How to subscribe to Charges of to Abakkus Smart Flexi Cap Subscription through MOFSL?

**Step 1:** Log in to Motilal Oswal App → Select Intelligent Advisory Portfolio →  
Under investment offerings from the hamburger menu  
Log in to Motilal Oswal Web → Visit [www.motilaloswal.com](http://www.motilaloswal.com) → Login to Trade →  
help me invest → Select Intelligent Advisory Portfolio

**Step 2:** Select **Abakkus Smart Flexi Cap Portfolio**

**Step 3:** Select Start 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

[View Video](#)

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



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**Investment in securities market are subject to market risks, read all the related documents carefully before investing.**

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