



Intelligent Advisory Portfolios

Alpha Bluechip

► What is Alpha Bluechip?

Alpha Bluechip is an unconstrained, concentrated portfolio of best-in-class companies across different sectors and market capitalizations. A high quality growth portfolio which intends to generate superior risk adjusted returns.

Key Features



Investment in companies with strong business moat and formidable competitive edge.



Includes businesses which are time tested and companies which have seen multiple cycles.



Selection of companies with robust growth, superior RoCE & strong cash flows to ensure a "High Quality Growth Portfolio with Moderate Risk"

► Investment Universe, Process & Strategy

- Defined investment universe to include companies with good quality businesses, strong track record and corporate governance
- Confluence of Sector/Company research; Regular expert/ management interaction
- Portfolio Construction based on best ideas on bottoms up basis
- Zero tolerance to Quality risk; Minimize Price/Volatility & Liquidity risk

USP



Investment in companies with Sustainable Quality Growth to ensure compounded returns



Low Mortality Portfolio

► Rebalancing Strategy

- Change in the outlook on business growth
- New idea generation

► For Whom?

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

► Basic Details

NO. OF STOCKS
20-25

BENCHMARK
Nifty 200

RISK
Aggressive

TIME FRAME
3-5 years

RIA

Top Stock Holding



The securities quoted are for illustration only and are not recommendatory

LUMP SUM

 **Option:** One Time Investment



Subscription mode: Upfront Subscription



Withdrawal: Full or Partial

Charges of Alpha Bluechip Subscription

Upfront Subscription

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

Brokerage: 0.50% + statutory costs

How to subscribe to Charges of Alpha Bluechip 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 → Login to Trade → help me invest → Select Intelligent Advisory Portfolio

Step 2: Select Alpha Bluechip

Step 3: Select 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

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For more information, email us - 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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