

What is BIO-Growth?

IAP Bio Growth is a dynamic product which identifies fundamentally strong underpriced stocks which can become market winners.





Identifies opportunities from universe of 5,000 listed stocks which have Market cap greater than Rs. 1,000 Crores.



Quant model tries to identify potential opportunities of over 30% in individual stocks by setting Expected Price and range for every stock basis quarterly data.



Risk management includes maximum sector exposure at 20%.

Investment Universe, Process & Strategy

Entire universe of NSE listed Stocks which have Market Cap greater than 1000 Cr.

Each and every stock is assigned an expected price and stocks with improvement in TTM fundamentals are filtered out for selection and ranking.





Invest in stocks with earnings growth only.
And, stay with winners all the time.



Construct Portfolio with Price to Earnings(PE) ratio being lower than Nifty Price to Earnings(PE) ratio.



Stocks are sold when prices reach potential expected Market Price.
Stocks also exit portfolio if the performance suffers in subsequent quarters.

Rebalancing Strategy

- When a stock reaches its Expected price set for the quarter, we advise to exit.
- If latest results are published and results fail to enthuse or scope to grow at that time is <15%, we advise to exit.
- Proceeds from sale are invested into best opportunities as on that day.

Basic Details

NO. OF STOCKS

5 or 10 in each investment.

Clear rules based on investment amount

BENCHMARK Nifty 50

RISK Aggressive TIME FRAME 3-5 Years





Option: One Time Investment



Subscription mode: Upfront Subscription



Withdrawal: Full or Partial

Charges of Bio Growth Portfolio 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: Maximum fees cap at Rs. 1.25 lakhs. 20%

fees above 10% hurdle rate. (Charged

quarterly). Charges are higher water marked.

Breakage Fees: 0.5%

Brokerage: 1.00% + statutory costs

How to subscribe to Bio Growth Portfolio through MOFSL?

Log in to Motilal Oswal App → Select Intelligent Advisory Portfolio →

Under investment offerings from the hamburger menu

Log in to Motilal Oswal Web \rightarrow Visit www.motilaloswal.com \rightarrow Login to Trade \rightarrow

help me invest → Select Intelligent Advisory Portfolio

Step 2: Select Bio Growth

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

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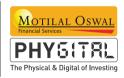
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For more information, email us - iapquery@motilaloswal.com





Motilal Oswal Financial Services Limited (MOFSL)* Member of NSE, BSE, MCX, NCDEX CIN No.: L67190MH2005PLC153397

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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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