



Intelligent Advisory Portfolios

# BIO-GROWTH

## ► What is BIO-Growth?

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

### Key Features



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.

## USP



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

## LUMP SUM

 **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?

**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 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

[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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