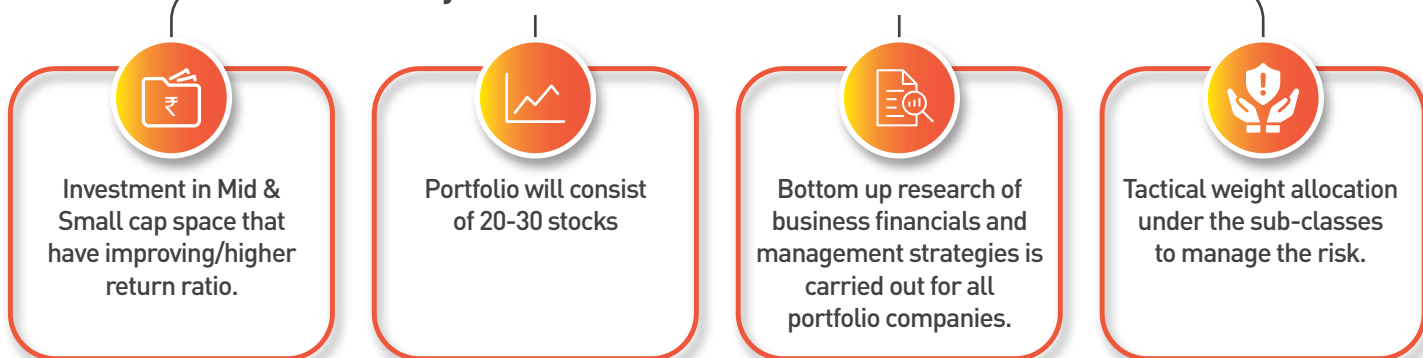


NS MID & SMALL CAP

► What is NS MID & SMALL CAP?

Portfolio comprising of Mid & Small cap stocks, which have potential to grow. Identified with bottom up approach which covers, Information mining, Financial modelling, Investment thesis, Active & Rigorous tracking for changes in the earnings & quality outlook.

Key Features of NS MID & SMALL CAP



► Investment Universe, Process & Strategy

• Stock selection procedure involving 3 broad processes:

- 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:

- Mid Cap: Max 80% and Min 50%
- Small Cap: Max 50% and Min 20%

USP

Strategy Identifies High Quality Moat Companies With Growth Potential On Mid & Smallcap Side

Using Strong Process & Bottoms Up Stock Selection Methodology

► Rebalancing Strategy

- Strictly based on fundamentals
- If portfolio stocks underperform for two consecutive swings and exhibit higher volatility, those stocks get marked for Sell/Review
- Corporate governance issue in the company

► For Whom?

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

► Basic Details

NO. OF STOCKS

20-30

BENCHMARK

Nifty Mid and Small 400

RISK

Aggressive

TIME FRAME

3-5 years

RIA Narnolia®

Top Stock Holding

**Narayana
Hrudayalaya
Ltd.**

**Cummins
India Ltd.**


**IDFC First
Bank Ltd.**

**Action
Construction
Equipment Ltd.**

**Zydus
Wellness Ltd.**

SIP

 **Option:** Systematic investment on Dates (1,8,18,22)

 **Top Up:** Investment will be done in LUMP SUM MODE

 **Subscription mode:** Upfront Subscription

 **Withdrawal:** Full

LUMP SUM

 **Option:** One Time Investment

 **Subscription mode:** Upfront Subscription

 **Withdrawal:** Full or Partial

Charges of NS MID & SMALL CAP Subscription

Upfront Subscription

RIA Charges : 2% p.a (Chargeable Half Yearly at 1% upfront for 6 months on daily average AUA)

Brokerage : 0.50% + statutory costs

How to subscribe to NS MID & SMALL CAP 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 **NS MID & SMALL CAP**

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

[View Video](#)

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Available on Android & iPhone



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



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Registered Office Address: Motilal Oswal Tower, Rahimtullah Sayani Road, Opposite Parel ST Depot, Prabhadevi, Mumbai-400025; Tel No.: 022-71934263; Website www.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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