



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 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 moderate risk appetite and an investment horizon of minimum 3-5 years

## ▶ Basic Details

**NO. OF STOCKS**  
15-20

**BENCHMARK**  
Nifty 200

**RISK**  
Moderate

**TIME FRAME**  
3-5 years

**RIA**

## LUMP SUM

- Option: One Time Investment
- Min Amount: 5 lakhs
- Top Up: Min ₹1 Lakh and multiples of ₹1000
- Subscription Model: Upfront Subscription

## 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 MO Investor App > From Main menu select Invest Now  
Log in to MO Investor Web > Select Help Me Invest

- Step 2:** Select Intelligent Advisory Products > Select Alpha Bluechip
- 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

Scan QR Code to download  MO Investor App

Available on Android & Apple



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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