



Intelligent Advisory Portfolios

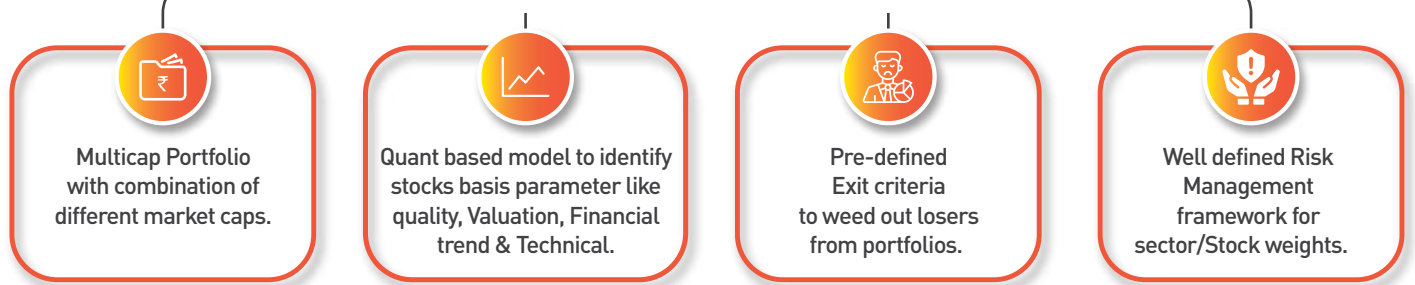
FUNDTECH



► What is FundTech?

An intelligent portfolio created by Robo Advisory with a combination of fundamental and technical parameters which is suitable for active investors who want to invest in companies with positive financial trend subject to thresholds of Quality and Valuation.

Key Features of FundTech



► Investment Universe, Process & Strategy

- Dynamic Portfolio creation comprising of 10 to 20 stocks
- Identifying stocks through Screening based on parameters like Quality, Valuation, Financial trend & technical parameters
- Maximum exposure of 30% in any sector & 10% in a single stock

USP



Active Investment Strategy



Robo Managed Process



Combination of Fundamental & Technical Parameters

► Rebalancing Strategy

- Continuous re-evaluation of portfolio in case of adverse change in the stock selection criteria
- Corporate governance issue in the company
- Stock underperformance between 15-25% Vs Benchmark BSE500

► For Whom?

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

► Basic Details

NO. OF STOCKS
10-20






BENCHMARK
BSE500

RISK
Moderate






TIME FRAME
3-5 years



SIP

-  **Option:** Systematic investment on Dates (1,8,18,22)
-  **Min Amount:** Rs. 10,000
-  **Top Up:** Investment will be done in LUMP SUM MODE
-  **Subscription mode:** Only Fixed Fee Model
-  **Withdrawal:** Full

LUMP SUM

-  **Option:** One Time Investment
-  **Min Amount:** 2.5 lakhs
-  **Top Up:** Min Rs. 50000 & in multiples of Rs. 1000
-  **Subscription mode:** Upfront Subscription or Fixed Fee Model
-  **Withdrawal:** Full or Partial

Charges of FundTech 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:** 20% performance Fees above 10% Hurdle rate (Charged quarterly) Higher water marked with **Maximum Fees cap at ₹1.25 Lakhs**
- Exit Load:** 0.5%
- Brokerage:** 1.00% + Statutory costs.

How to subscribe to FundTech 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 **FundTech**
- 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



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

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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