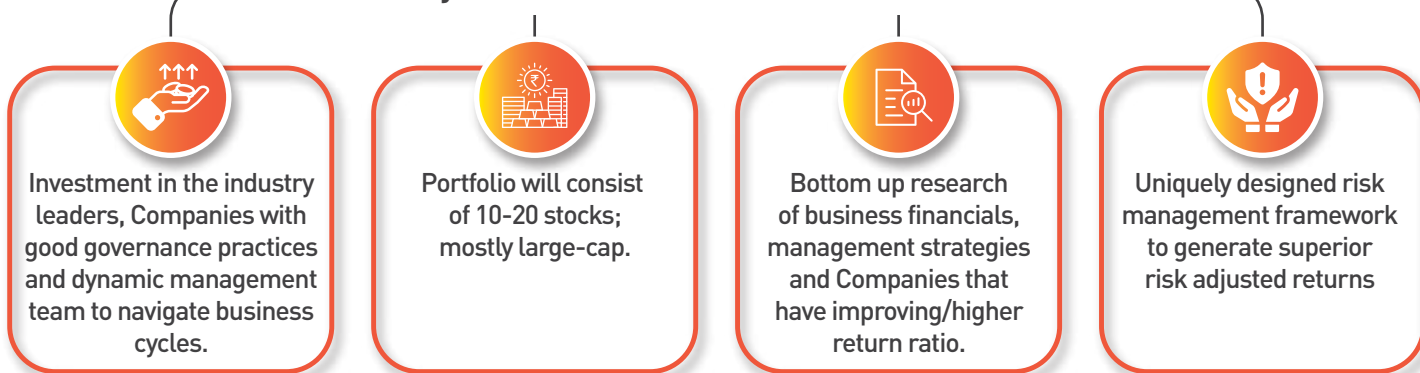


NS INDUSTRY CHAMP

► What is NS INDUSTRY CHAMP?

Portfolio comprising leaders (top-3 players) of their respective industry and stocks which are showing growth in value characteristics with expected higher return ratio.

Key Features of NS INDUSTRY CHAMP



► Investment Universe, Process & Strategy

• Stock selection procedure involving broad process:

- 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:

- Large Cap: Max 70% and Min 30%
- Mid Cap: Max 70% and Min 30%
- Small Cap: Max 15% and Min 0%

USP



Strategy Focusing On Investing
In The Industry Leaders Of Today



Backed By Quality Management
Which Are Focused On Innovation

► Rebalancing Strategy

- Strictly based on fundamentals
- If portfolio stocks underperform to respective benchmark 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 conservative risk appetite and investment horizon of minimum 3-5 years.

► Basic Details

NO. OF STOCKS

10-20

BENCHMARK

Nifty Large
and Mid-250

RISK

Conservative

TIME FRAME

3-5 years

RIA Narnolia®

NS INDUSTRY CHAMP Performance

	Nov-21(%)	3 M(%)	6 M(%)	1 Yr.(%)	LTD(%)
NS INDUSTRY CHAMPS	0.51	6.18	28.42	47.66	121.2
NIFTY LARGE MIDCAP 250	-2.43	2.97	13.19	41.14	129.01

*Launch Date April 2020. Performance as on 30th November 2021

Top Stock Holding



SIP

- Option:** Systematic investment on Dates (1,8,18,22)
- Min Amount:** Rs. 25,000
- 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:** 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 NS INDUSTRY CHAMP 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 Charges of NS INDUSTRY CHAMP 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 **NS INDUSTRY CHAMP**

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](#)

Scan QR Code to download **MO Investor App**

Available on Android & Apple



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



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Correspondence Office Address: Palm Spring Centre, 2nd Floor, Palm Court Complex, New Link Road, Malad (West), Mumbai- 400 064. Tel No: 022 7188 1000. Registration Nos.: Motilal Oswal Financial Services Limited (MOFSL)*: INZ000158836. (BSE/NSE/MCX/NCDEX); CDSL and NSDL: IN-DP-16-2015; Research Analyst: INH000000412. AMFI: ARN - 146822; Investment Adviser: INA000007100; Insurance Corporate Agent: CA0579. Motilal Oswal Asset Management Company Ltd. (MOAMC): PMS (Registration No.: INP000000670); PMS and Mutual Funds are offered through MOAMC which is group company of MOFSL. Motilal Oswal Wealth Management Ltd. (MOWML): PMS (Registration No.: INP000004409) is offered through MOWML, which is a group company of MOFSL. • Motilal Oswal Financial Services Limited is a distributor of Mutual Funds, PMS, Fixed Deposit, Bond, NCDs, Insurance Products, Investment advisor and IPOs.etc • Real Estate is offered through Motilal Oswal Real Estate Investment Advisors II Pvt. Ltd. which is a group company of MOFSL. • Private Equity is offered through Motilal Oswal Private Equity Investment Advisors Pvt. Ltd which is a group company of MOFSL. • Research & Advisory services is backed by proper research. Please read the Risk Disclosure Document prescribed by the Stock Exchanges carefully before investing. There is no assurance or guarantee of the returns. PMS is not offered in Commodity Derivatives segment. Details of Compliance Officer: Name: Neeraj Agarwal, Email ID: na@motilaloswal.com, Contact No.:022-71881085. *MOSL has been amalgamated with Motilal Oswal Financial Services Limited (MOFSL) w.e.f August 21, 2018 pursuant to order dated July 30, 2018 issued by Hon'ble National Company Law Tribunal, Mumbai Bench. The information is only for consumption by the client and such material should not be redistributed. The securities quoted are exemplary and are not recommendatory. Brokerage will not exceed SEBI prescribed limit. Customer having any query/feedback/ clarification may write to query@motilaloswal.com. In case of grievances for Securities Broking write to grievances@motilaloswal.com, for DP to dpgrievances@motilaloswal.com.

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