



Intelligent Advisory Portfolios

OpenQ MNC

▶ What is OpenQ MNC?

Portfolio of Top stocks from Multi-National Companies (MNC) universe designed for passive long term investing created basis Quantitative method & proprietary filters.

Key Features of OpenQ MNC



Investment in High quality MNC stocks that have their Price and Earnings Momentum adjusted for risk.



Stocks are weighted by considering individual stock level risk. Quantitative techniques are used to arrive at the stock level risk. Stocks which have shown higher relative risk in recent past are accordingly down weighted.

▶ Investment Universe, Process & Strategy

Stock selection procedure involving 3 broad process:

- **Universe:** Pool of listed MNCs which are part of top 500 by market cap
- **Quantitative analysis for identifying MNC companies with** Growth in earnings and price momentum
- **Proprietary Liquidity Screening to avoid stocks with low liquidity**
- Judicious mix of Multicap portfolio with mix of large, Mid & Small markets capitalisation companies.

USP



Identifying High quality MNC stocks coupled with Earnings and Price



Quantitative methodology with no human bias

▶ Rebalancing Strategy

- Quarterly rebalancing
- If the portfolio falls more than 20% from the peak
- If individual stock in portfolio fall more than 15% in intraday

▶ For Whom?

Investors with moderate to high risk profile having investment horizon of minimum 3 years or more

▶ Basic Details

NO. OF STOCKS
10






BENCHMARK
Nifty MNC

RISK
Moderate to High






TIME FRAME
3 years

RIA

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 OpenQ MNC 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 OpenQ MNC 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 **OpenQ MNC**
- 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



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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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