



Intelligent Advisory Portfolios

PRIME PORTFOLIO

► What is Prime Portfolio?

Prime Portfolio is a concentrated portfolio that blends tactical bets with long term winners and provides investor advantage with a mix of long term compounders as well as special company/sectoral picks.

Key Features of Prime Portfolio



Blend of long term winners (60%) with Tactical bets (40%)



Well diversified portfolio comprising of large, mid and small cap companies

► Investment Universe, Process & Strategy

Stock selection procedure involving 2 strategies:

Long Term Winners (60%): Stocks relevant from a 12-18 month perspective – these are companies which have a proven track record of profits over 3-5 years, meaningful growth triggers & beaten down stocks with favourable risk reward

Tactical bets (40%): Stocks that are relevant from 3-6 months horizon. Major buy triggers include a change in government policy, industry consolidation and company specific opportunities

USP



Combination of Tactical bets along with Long term winners



Generating growth over long term as well as take advantage of special company / sector situations



Concentrated portfolio of 15-20 stocks

► Rebalancing Strategy

- Company or Industry fundamentals have started to change
- Too much negativity around a company or sector
- An extreme macroeconomic / market situation
- Stocks that have better growth prospects or better capital allocation policies

► For Whom?

Investors with moderate to high risk profile having an investment horizon of a minimum 12 - 18 months

► Basic Details

NO. OF STOCKS
15-20

BENCHMARK
Nifty200

RISK
Moderate to High

TIME FRAME
12-18 months


RIA
VIVEKAM
LEARN TO LEARN

LUMP SUM

 **Option:** One Time Investment

 **Min Amount:** 1 lakh

 **Top Up:** Min Rs. 25000 & in multiples of Rs. 1000

 **Subscription mode:** Upfront Subscription or Fixed Fee Model

Charges of Prime Portfolio 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 Prime Portfolio 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 **Prime**

Step 3: Select Start 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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