



► **What is Zodiac?**

An intelligent portfolio of 12 Nifty Stocks dynamically created by a combination of fundamental screening and a quant model.

Key Features



Strategy to dynamically invest in 12 Nifty 50 companies on a daily basis



Fundamental research combined with quant model to avoid biases



In case quant model doesn't find opportunity in Nifty stocks, allocation for those stocks will be done to Nifty Bees.



Active management to review portfolio stocks

► **Investment Universe, Process & Strategy:**

- Dynamic portfolio comprising of 12 Nifty stocks in equal weights
- Identifying stocks through fundamental screening and a quant model based on parameters like growth in earnings, sectorial preference, momentum and volatility factors
- Maximum exposure of 25% in a particular sector, Maximum 3 stocks from a sector and minimum 5 sectors at portfolio initiation.

USP



Dynamic Portfolio of 12 winning stocks from Nifty 50 basket



• Core Fundamental research combined with Quant Model for Decision making to avoid Human Bias



Active management to review portfolio stocks

► **Rebalancing Strategy:**

- When Potential upside is achieved.
- If Stock is excluded from Nifty Index.
- In case Nifty Bees is part of portfolio it will be replaced when a new Stock opportunity with potential is identified.
- Stock Price corrects by more than tolerance levels

► **For Whom?**

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

► **Basic Details**

NO. OF STOCKS

12

BENCHMARK

Nifty 50

RISK


Moderate

TIME FRAME

3-5 years

LUMP SUM

 **Option:** One Time Investment

 **Min Amount:** 5 lakhs



Subscription mode: Upfront Subscription or Fixed Fee Model



Top Up: Min ₹1 lakh and multiples of ₹1000

Charges of Zodiac

Upfront Subscription

RIA Charges: 2% p.a. [Chargeable Half Yearly at 1% for 6 months on AUA]

Brokerage: 0.50% + statutory costs

Fixed Fee Model

RIA Charges: Maximum Fees cap at Rs.1.25 Lakh

Exit Load: 0.5%

Brokerage: 1.00% + Statutory costs

How to subscribe to Charges of Zodiac 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 Zodiac

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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