



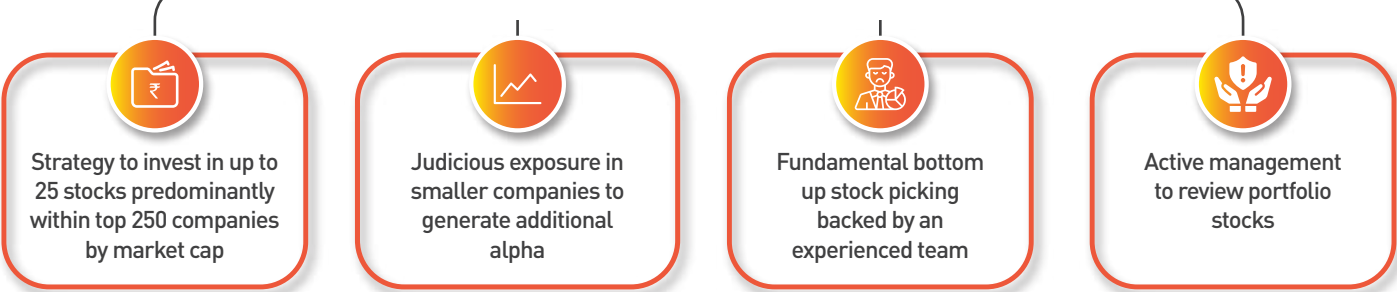
Intelligent Advisory Portfolios



► **What is Abakkus Smart Flexi Cap Portfolio?**

A diversified portfolio predominantly from the universe of top 250 companies with focus on alpha generation along with stability and liquidity.

Key Features of Abakkus Smart Flexi Cap Portfolio



► **Investment Universe, Process & Strategy**

- Universe comprises of top 250 companies by Market cap
- Identifying stocks through various filters based on management quality, corporate governance, sector headwinds and In-depth research and bottom up fundamental approach
- Diversified Portfolio of up to 25 companies with Risk management (Single stock exposure ideally less than 10% and max sector exposure at 30%)

USP



Select exposure in smaller companies to generate additional alpha

MEETS

Differentiated portfolio adhering to "MEETS" Framework



Management

Quality, capability, & track record of the management



Earnings

Quality of earnings v/s. reported numbers. Companies that can double profits in 4 years or less or where EV/EBITDA can halve in four years



Events/Trends

Stock movement because of events - Can be a buy or sell opportunity



Timing

Good Company is not necessarily a good investment if price is not right- Time frame of investment



Structural

Size of the opportunity - Consistent growth in profits

► **Rebalancing Strategy**

- Only when there is a better alternative or a better risk-reward in another stock based on valuations

► **For Whom?**

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

► **Basic Details**

NO. OF STOCKS
Up to 25

BENCHMARK
Nifty 200

RISK
Aggressive

TIME FRAME
3-5 years



Top Stock Holding

Jindal
Stainless

Sun
Pharmaceutical
Industries

Polycab
India Ltd

Larsen &
Toubro

Cummins
India Ltd

The securities quoted are for illustration only and are not recommendatory.
The current universe may or may not be a part of the future universe and may or may not be a part of all client portfolios.

LUMP SUM

-  **Option:** One Time Investment
-  **Subscription mode:** Upfront Subscription
-  **Withdrawal:** Full or Partial

Charges of Abakkus Smart Flexi Cap Portfolio

Upfront Subscription

RIA Charges: 2.5% p.a (Chargeable Half yearly at
1.25% upfront for 6 months on daily
average AUA)

Brokerage*: 0.50% + statutory costs

* Charged by MOFSL

How to subscribe to Charges of to Abakkus Smart Flexi Cap Subscription through MOFSL?

Step 1: Log in to Motilal Oswal App → Select Intelligent Advisory Portfolio →
Under investment offerings from the hamburger menu
Log in to Motilal Oswal Web → Visit www.motilaloswal.com → Login to Trade →
help me invest → Select Intelligent Advisory Portfolio

Step 2: Select **Abakkus Smart Flexi Cap Portfolio**

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

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



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