



INTELLIGENT ADVISORY PORTFOLIOS

New Age of Investment Products
vetted by MOFSL framework for
Distribution

What are Intelligent Advisory Portfolios?

A new age of Investment products which provides a seamless opportunity for you to invest in equity markets without getting into the trouble of researching for the stocks, studying the current market conditions or going through a plethora of numbers and details. Intelligent Advisory Portfolios (IAP) are one of the contemporary ways to take the ride of the stock market. IAP are a diverse range of pre-packaged equity portfolios advised by Registered Investment Advisors (RIAs), ideal for both active and passive investors. These portfolios are curated & monitored by the RIAs and follow strict rules & parameters to manage the risk-return ratio of your investment.

Benefits of Intelligent Advisory Portfolios



Option to choose from Dynamic or Static portfolios



IAP is an end-to-end complete digital solution



Power of Discretion on every recommendation



ROBO Managed Investment Products or fundamental driven products with the RIA overlay



Flexible investment modes with option to choose from Lump Sum & SIP

IAP Product offerings



ALPHA BLUECHIP

Alpha Bluechip is an unconstrained, concentrated portfolio of best-in-class companies across different sectors and market capitalizations. A high quality growth portfolio which intends to generate superior risk adjusted returns.

Risk Appetite : Aggressive | **Ideal Timeframe :** 3-5 Years
RIA : Renaissance Smart Tech Pvt. Ltd.



AAA Emerging Business Opportunities

AAA Emerging Business Opportunities is a portfolio of 10-15 companies which are market leaders with strong corporate governance and high growth potential with investment horizon of 3-5 years.

Risk Appetite : High | **Ideal Timeframe :** 5+ Years
RIA : Alfaccurate Advisors Pvt. Ltd.



ABAKKUS

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

Risk Appetite : Aggressive | **Ideal Timeframe :** 3-5 Years
RIA : Abakkus Asset Manager LLP



Trend Marathon

Marathon Trends strategy offers a distinctive investment approach, blending the strengths of Fundamental and Technical analysis. It strives to acquire fundamentally sound stocks while leveraging technical analysis for optimized entry and exit points, maximizing investment returns.

Risk Appetite : Aggressive | **Ideal Timeframe :** 3-5 Years
RIA : Marathon Trends Advisory Pvt. Ltd.



NS MID & SMALL CAP

Portfolio comprising of Mid & Small cap stocks, which have potential to grow. Identified with bottom up approach which covers, Information mining, Financial modelling, Investment thesis, Active & Rigorous tracking for changes in the earnings & quality outlook

Risk Appetite : Aggressive | **Ideal Timeframe :** 3-5 Years
RIA : Narnolia Investment Advisors Pvt. Ltd.



NS Ethical S1

A unique theme-based portfolio which refrains from investing in those companies which may be against moral, social, religious or environmental beliefs of investors.

Risk Appetite : Aggressive | **Ideal Timeframe :** 5 Years
RIA : Narnolia Investment Advisors Pvt. Ltd.



PRIME

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.

Risk Appetite : Moderate | **Ideal Timeframe :** 3-5 Years
RIA : Vivekam Financial Services Pvt. Ltd.



BOUYANT OPPORTUNITIES

Buoyant Opportunities is a cross-cycle, flexi-cap, reasonably concentrated portfolio of Indian stocks that seeks to generate Index-beating returns over the medium to long term.

Risk Appetite : Aggressive | **Ideal Timeframe :** 3 Years
RIA : Buoyant Capital Pvt. Ltd.



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.

Risk Appetite : Conservative | **Ideal Timeframe :** 3-5 Years
RIA : Narnolia Investment Advisors Pvt. Ltd.



NS 5Tx5T

Thematic Portfolio created with multiple themes which have potential to grow based on opportunities created as Indian Economy move to 5 Trillion dollar.

Risk Appetite : Aggressive | **Ideal Timeframe :** 3-5 Years
RIA : Narnolia Investment Advisors Pvt. Ltd.








ZODIAC

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






Risk Appetite : Moderate | **Ideal Timeframe :** 3-5 Years
RIA : Vivekam Financial Services Pvt. Ltd.



LUMP SUM

-  **Option:** One Time Investment
-  **Min Amount:** ₹1 Lakhs – ₹5 Lakhs
-  **Top Up:** Min ₹ 50,000 & in multiples of ₹ 1,000
-  **Subscription mode:** Upfront Subscription
-  **Withdrawal:** Full or Partial

SIP

-  **Option:** Systematic investment on Dates (1,8,18,22)
-  **Min Amount:** ₹ 25,000
-  **Top Up:** Investment will be done in LUMP SUM MODE
-  **Subscription mode:** Upfront Subscription
-  **Withdrawal:** Full

*Kindly note, SIP mode of investment is available only for few IAP products.

Digital journey of Investing

How to subscribe to products through MOFSL?

Scan QR Code to download  **Motilal Oswal App**

Available on Android & iPhone



Web :







Visit www.motilaloswal.com > Login to Trade > help me invest > **Select Intelligent Advisory Portfolio**

- Select Product offered by RIA
- Select Mode (Lump sum/ SIP)
- Complete RIA KYC & Risk profiler
- Select Subscription Model
- RIA Generates Advice
- Client provides Consent & Invests In Portfolio

App :

Login to Motilal Oswal App > **Select Intelligent Advisory Portfolio** > Under investment offerings from the hamburger menu

Digital Enabled process to confirm the orders

-  Notification on Motilal Oswal App
-  Login to MO Investor Web
-  Email on registered email address
-  SMS on registered mobile number
-  Auto Call on your registered mobile number
-  Confirmation from Dealer/Advisor through OTP

Motilal Oswal Financial Services Limited (MOFSL)* Member of NSE, BSE, MCK, NCDEX CIN No.: L67190MH2005PLC153397

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***Such representations are not indicative of future results.**

Investments in securities market are subject to market risks, read all the related documents carefully before investing.

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