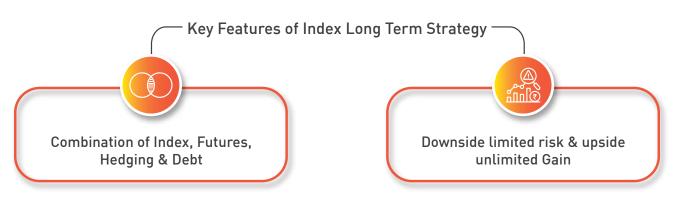


### What is Index Long Term Strategy?

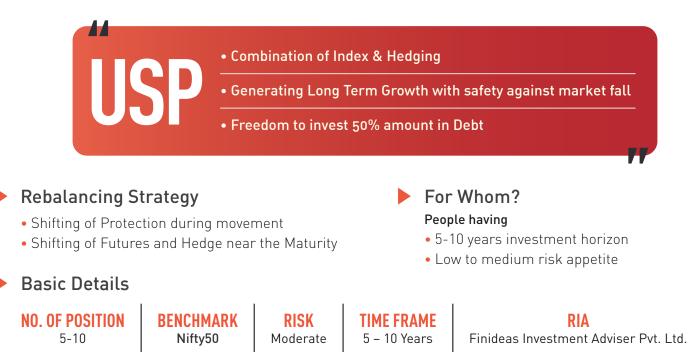
- Investing in Index ETFs
- Using Futures to have lower cost of Financing
- Using Options for Hedging
- Investing in Debts to earn Interest Arbitrage



## Investment Universe, Process & Strategy

### Investing money in two parts as follows

- 50% kept invested in Trading account such that 100% exposure in index is taken using combination of Equity & Futures
- Rest 50% invested in debt by Investor



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

# **Top Stock Holdings**



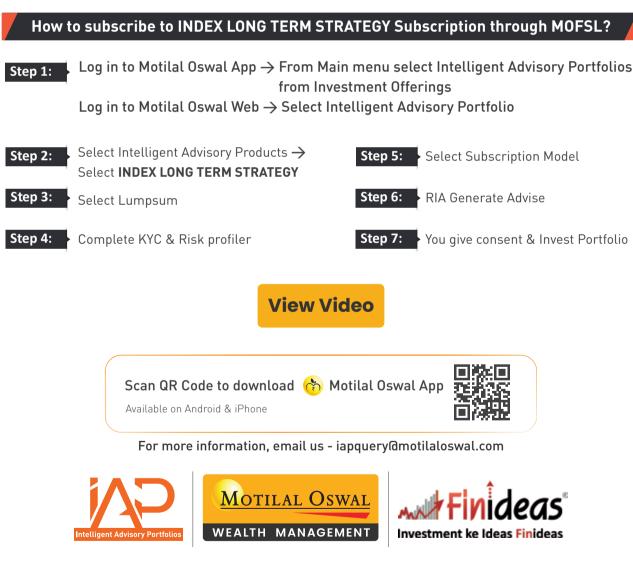
The securities quoted are for illustration only and are not recommendatory. The current universe may or may not be a part of the future universe and may or may not be a part of all client portfolios.

## LUMP SUM

### Charges of INDEX LONG TERM STRATEGY Subscription

Option: One Time Payment

- Upfront Subscription
- Subscription mode: Upfront Subscription
- **RIA Charges (On Exposure Value):** 1.5% p.a (Chargeable Half Yearly at 0.75% upfront for 6 months)
- Withdrawal: Exposure Value of 1 Lot of Nifty50 Or in multiple of that
- **Brokerage**\* : 0.50% + statutory costs



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

Registered Office Address: Motilal Oswal Tower, Rahimtullah Sayani Road, Opposite Parel ST Depot, Prabhadevi, Mumbai-400025; Tel No.: 022-71934263; Website www.motilaloswal.com. Correspondence Office Address: Palm Spring Centre, 2<sup>nd</sup> Floor, Palm Court Complex, New Link Road, Malad (West), Mumbai-400064. Tel No: 022 7188 1000. Registration Nos.: Motilal Oswal Financial Services Limited (MOFSL)\*: INZ000158836. (BSE/NSE/MCX/NCDEX); CDSL and NSDL: IN-DP-16-2015; Research Analyst: INH000000412. AMFI: ARN - 146822; ; Insurance Corporate Agent: CA0579. Motilal Oswal Asset Management Company Ltd. (MOAMC): PMS (Registration No.: INP00000670); PMS and Mutual Funds are offered through MOAMC which is group company of MOFSL. Motilal Oswal Wealth Management Ltd. (MOWML): PMS (Registration No.: INP00000409) is offered through MOVML, which is a group company of MOFSL. Motilal Oswal Financial Services Limited is a distributor of Mutual Funds, PMS, Fixed Deposit, Bond, NCDs, Insurance Products, Investment advisor and IPOs etc . These are not Exchange traded products and the Trading Member is just acting as distributor. All disputes with respect to the distribution activity would not have access to Exchange Investor Redressal Forum or Arbitration mechanism • Research & Advisory services is backed by proper research. Please read the Risk Disclosure Document prescribed by the Stock Exchanges carefully before investing. There is no assurance or guarantee of the returns. Details of Compliance Officer: Name: Neeraj Agarwal, Email ID: na@motilaloswal.com, Contact No.:022-40548085.The securities quoted are exemplary and are not recommendatory. Brokerage will not exceed SEBI prescribed limit. Customer having any query/feedback/ clarification may write to query@motilaloswal.com. In case of grievances for Securities Broking write to grievances@motilaloswal.com.

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