



Intelligent Advisory Portfolios

INDEX LONG TERM STRATEGY

► 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

Key Features of Index Long Term Strategy



Combination of Index, Futures, Hedging & Debt



Downside limited risk & upside unlimited Gain

► 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

USP

- Combination of Index & Hedging
- Generating Long Term Growth with safety against market fall
- Freedom to invest 50% amount in Debt

► Rebalancing Strategy

- Shifting of Protection during movement
- Shifting of Futures and Hedge near the Maturity

► Basic Details

NO. OF POSITION
5-10

BENCHMARK
Nifty50

RISK
Moderate

TIME FRAME
5 – 10 Years

RIA
Finideas Investment Adviser Pvt. Ltd.

► For Whom?

- People having
- 5-10 years investment horizon
 - Low to medium risk appetite

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



Option: One Time Payment



Subscription mode: Upfront Subscription



Withdrawal:
Exposure Value of 1 Lot of Nifty50 Or in multiple of that

Charges of INDEX LONG TERM STRATEGY Subscription

Upfront Subscription

RIA Charges (On Exposure Value):

1.5% p.a (Chargeable Half Yearly at 0.75% upfront for 6 months)

Brokerage* : 0.50% + statutory costs

*Charged by MOFSL

How to subscribe to INDEX LONG TERM STRATEGY Subscription through MOFSL?

Step 1: Log in to Motilal Oswal App → From Main menu select Intelligent Advisory Portfolios from Investment Offerings
Log in to Motilal Oswal Web → Select Intelligent Advisory Portfolio

Step 2: Select Intelligent Advisory Products →
Select **INDEX LONG TERM STRATEGY**

Step 3: Select Lumpsum

Step 4: Complete KYC & Risk profiler

Step 5: Select Subscription Model

Step 6: RIA Generate Advise

Step 7: You give consent & Invest Portfolio

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