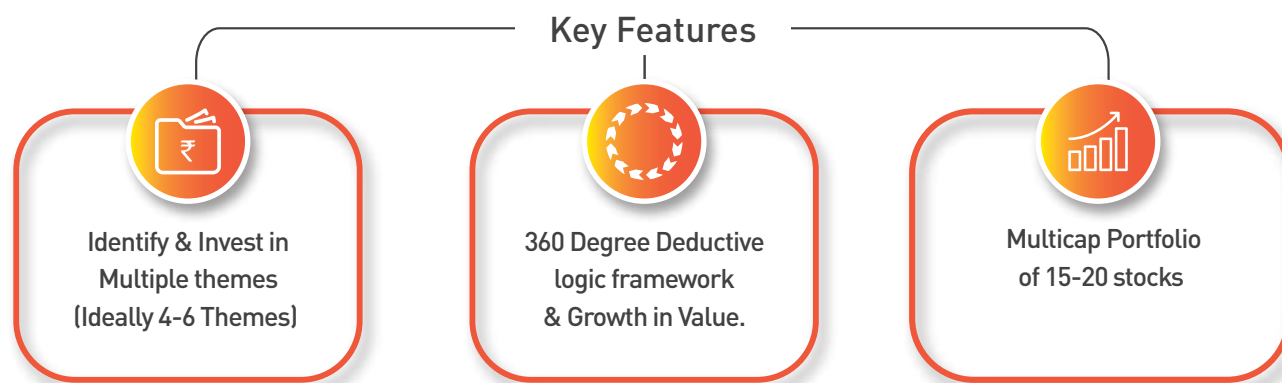


# NS 5Tx5T

## ► What is NS 5Tx5T?

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



## ► Investment Universe, Process & Strategy

### • Stock selection procedure involving broad processes

- A combination of fundamental value and quantitative triggers to create a high value portfolio with focus to deliver superior risk adjusted returns on absolute, relative and consistent basis.
- Principle of "Growth in Value" style of investing & principle of linearity, i.e. investing in businesses, where the improvement in fundamentals is linear (gradual) which gives an opportunity for valuation multiple expansion, along with earnings growth.
- **Maximum allocation in a stock:** 10% while maintaining sector diversity

## USP



Strategy identifies Unique themes based opportunity in the Indian market



Strong process & bottoms up selection methodology.

In The Industry Leaders Of Today

Which Are Focussed On Innovation

## ► Rebalancing Strategy

- If portfolio stocks underperform for two consecutive swings and exhibit higher volatility, those stocks get marked for Sell/Review
- Corporate governance issue in the company

## ► For Whom?

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

## ► Basic Details

**NO. OF STOCKS**

15-25

**BENCHMARK**

Nifty 500

**RISK**

Aggressive

**TIME FRAME**

3-5 years

**RIA**

Narnolia Investment Advisors Pvt. Ltd.

# Top Stock Holding



## SIP



**Option:** Systematic investment on Dates {1,8,18,22}



**Top Up:** Investment will be done in LUMP SUM MODE



**Subscription mode:** Upfront Subscription



**Withdrawal:** Full

## LUMP SUM



**Option:** One Time Investment



**Subscription mode:** Upfront Subscription



**Withdrawal:** Full or Partial

## Charges of NS 5Tx5T

### Upfront Subscription

**RIA Charges:** 2% p.a. (Chargeable Half Yearly at 1%  
upfront for 6 months on daily average  
AUA)

**Brokerage:** 0.50% + statutory costs

## How to subscribe to Charges of NS 5Tx5T 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](http://www.motilaloswal.com) → Login to Trade →  
help me invest → Select Intelligent Advisory Portfolio

### Step 2:

Select NS 5Tx5T

### 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

## View Video

Scan QR Code to download  Motilal Oswal App

Available on Android & iPhone



For more information, email us - [iapquery@motilaloswal.com](mailto:iapquery@motilaloswal.com)



**Narnolia®**

**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](http://www.motilaloswal.com).  
Correspondence Office Address: Palm Spring Centre, 2<sup>nd</sup> Floor, Palm Court Complex, New Link Road, Malad (West), Mumbai- 400 064. 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.: INP000000670); PMS and Mutual Funds are offered through MOAMC which is group company of MOFSL. Motilal Oswal Wealth Management Ltd. (MOWML): PMS (Registration No.: INP000004409) is offered through MOWML, 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](mailto: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](mailto:query@motilaloswal.com). In case of grievances for Securities Broking write to [grievances@motilaloswal.com](mailto:grievances@motilaloswal.com), for DP to [dpgrievances@motilaloswal.com](mailto:dpgrievances@motilaloswal.com).

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

Intelligent Advisory Portfolios (IAP) is third party product which is offered by SEBI Registered Investment Advisors (RIA). MOFSL is acting as distributor of Investment Advisory services for Narnolia Investment Advisors Pvt. Ltd: Registration no.INA300005439. This is not Exchange traded product. All disputes with respect to the distribution activity, would not have access to Exchange investor redressal forum or Arbitration mechanism.