



► What is Marathon Trends?

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

Key Features



Trending Earnings

Company performs across business cycles



Trending Price

Stock that falls less in falling markets, but first to recover



Discipline

Ride your winners & cut your losers

► Investment Universe, Process & Strategy

Investment Universe: Product selects from the top 300 Quality liquid stocks across Large, Mid, and small-cap segments, aiming for smooth entry and exit with minimal impact costs.

Strategy: We follow the principle of "cutting losses and letting profits run," prioritizing risk management and nurturing winning positions. Our process includes a highly disciplined selling approach, which is often a challenge for many investors. However, our strength lies in our unwavering discipline in executing sell decisions.

Process: Product initially identifies the top 300 liquid stocks. Subsequently, fundamental analysis is done to pinpoint high-quality stocks with strong long-term earnings and recent growth acceleration. Further filtering is done through Technical analysis, resulting in 20-25 stocks exhibiting favourable & consistent price momentum. Strategy exit positions upon observing a reversal in both earnings and price trends.

USP

This distinctive strategy synergizes the strengths of Fundamental and Technical analysis. By combining a deep understanding of company fundamentals with comprehensive knowledge of technical indicators, the product identifies quality stocks and adeptly adapts to market dynamics, ensuring timely responses to changes in the investment landscape.

This strategy remains flexible across sectors and market caps, effortlessly aligning with broader trends. It incorporates an inherent refresh mechanism, regularly replacing underperforming stocks in the portfolio with newer ones exhibiting stronger trends. This ensures adaptability and enhances the strategy's ability to capture favourable market conditions.

► Rebalancing Strategy

The strategy focuses on replacing underperforming stocks in the portfolio with emerging trends, maintaining an optimal balance between minimizing churn and ensuring a trending portfolio. This process is carefully timed to strike the right balance for portfolio adjustments.

► Basic Details

NO. OF STOCKS	BENCHMARK	RISK	TIME FRAME	RIA
20-25	BSE 500	Aggressive	3-5 years	Marathon Trends Advisory Pvt. Ltd.

LUMP SUM



Option: One Time Investment



Subscription mode: Upfront Subscription



Withdrawal: Full or Partial

Charges of TREND INVESTING Subscription

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

*Charged by MOFSL

How to subscribe to Charges of TREND INVESTING 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 **TREND INVESTING**
- 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

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

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