

Motilal Oswal India opportunity Portfolio Strategy – V2 (IOP2 PMS)

KEY PORTFOLIO ATTRIBUTES

ABOUT MOTILAL OSWAL ASSET MANAGEMENT

Motilal Oswal Asset Management Company Ltd. (<https://www.motilaloswalmf.com/>) is promoted by Motilal Oswal Financial Services Limited (MOFSL). Lead by one of the most well-known investors in India Mr. Raamdeo Agrawal, Motilal Oswal AMC is almost synonymous with philosophy based investing – its flagship philosophy “Quality Growth Longevity and Price” (QGLP) and “Buy Right and Sit Tight” which have popularized well researched investing.

KEY PEOPLE



(https://www.pmsaifworld.com/team_mf/mr-raamdeo-agrawal/)

Raamdeo Agrawal
Chairman

0 0 0 0 0



Prateek Agrawal
Executive Director

0 0 0 0 0



Manish Sonthalia
Executive Director
& CIO

0 0 0 0 0

Investment Objective

Motilal Oswal India opportunity Portfolio Strategy – V2 or IOP2 PMS aims to generate long term capital appreciation by creating a focused portfolio of high growth stocks having the potential to grow more than the nominal GDP for next 5-7 years across and which are available at reasonable market prices.

The Strategy aims to deliver superior returns by investing in stocks from sectors that can benefit from India's emerging businesses. It aims to predominantly invest in Small and Midcap stocks with a focus on identifying potential winners.

Investment Strategy

Motilal Oswal India opportunity Portfolio Strategy – V2 or IOP2 PMS intends to focus on Sectors and Companies which promise a higher than average growth.

The strategy seeks to primarily invest in Equity and Equity-related instruments of small cap and mid cap companies. However, the strategy has the flexibility to invest in companies across the entire market capitalization spectrum

It follows the 'Buy Right & Sit Tight' policy, predominantly to invest in small & Mid Cap with focus on potential winners. Focus on sectors & Companies which promise a higher-than-average Growth by focusing on QGLP (Quality, Growth, Longevity, and Price).

- Buy Right is represented by – (QLGP)

"Q" denotes the quality of the business and management

"G" denotes growth in earnings and sustained RoE

"L" denotes longevity of the competitive advantage or economic moat of the business

"P" denotes our approach of buying a good business for a fair price rather than buying a fair business for a good price

- Sit Tight

Buy and Hold: Strictly buy and hold and believe that picking the right business needs skill and holding onto these businesses to enable investors to benefit from the entire growth cycle needs even more skill.

Focus: High conviction portfolios with 25 to 30 stocks being our ideal number. We believe in adequate diversification but over-diversification results in diluting returns and add market risk.

Why 'Buy Right, Sit Tight' is significant?

- Real wealth is created by riding out bulk of the growth curve of quality companies and not by trading in and out in response to buy, sell and hold recommendations.
- This philosophy enables investor and manager alike to keep focus on the businesses they are holding rather than get distracted by movements in share prices
- An approach of buying high quality stocks and holding them for a long term wealth creation motive, results in drastic reduction of costs for the end investor.

- While BUY RIGHT is largely the role of the portfolio manager, SIT TIGHT calls for involvement from the portfolio manager as well as investor. This brings in greater accountability from the manager and at the same time calls for better involvement and understanding from investor resulting in better education for the latter.
- Long term multiplication of wealth is obtained only by holding on to the winners and deserting the losers.

Wealth Creators – Buy and Hold strategy

- BUY & HOLD strategy, leading low churn, lower costs and enhanced returns
- A business is prudently picked for investment after a thorough study of its underlying hidden long-term potential.
- “We don’t get paid for activity, just for being right. As to how long we’ll wait, we’ll wait indefinitely.” -Warren Buffett


Awards & Achievements - Across Motilal Oswal PMSs & AIFs

- In 2021, Motilal Oswal Next Trillion Dollar Opportunity Portfolio (NTDOP) was awarded Rank #1 as the Best PMS across all categories , on a 10Y Risk-Adjusted Returns. These Awards were hosted by PMS AIF WORLD, in association with IIM-Ahmedabad.
- In 2021, Motilal India Rising India Fund, a Long Only Cat III AIF, was awarded the winner in the Best Long Only Cat III AIF, on 2Y Absolute Returns. These Awards were hosted by PMS AIF WORLD, in association with IIM-Ahmedabad.
- In 2020, Motilal Oswal Next Trillion Dollar Opportunity Portfolio (NTDOP) was awarded Rank #3 as the Best PMS across all categories , on a 10Y Risk-Adjusted Returns. These Awards were hosted by PMS AIF WORLD, in association with IIM-Ahmedabad.
- In 2020, Motilal Oswal Next Trillion Dollar Opportunity Portfolio (NTDOP) was awarded Rank #3 as the Best PMS across all categories , on a 5Y Risk-Adjusted Returns. These Awards were hosted by PMS AIF WORLD, in association with IIM-Ahmedabad.





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(<https://www.pmsaifworld.com/pms/motilal-oswal-value-pms/>)



Motilal Oswal Multifactor
Equity PMS
(<https://www.pmsaifworld.com/pms/motilal-oswal-multifactor-equity-pms/>)



MOTILAL OSWAL Business
Opportunities Portfolio
(BOP PMS)
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MOTILAL OSWAL India



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PMS
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Part of 69, 2nd Floor, Karuna Kunj Sector-03, Dwarka, Delhi -110078

PMS AIF WORLD – KOLKATA

4A Ray Street, Kamdhenu Complex, Kolkata – 700020

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504, Zion Building, 5th Floor, Sector 10 Kharghar, Navi Mumbai, Maharashtra 410210

PMS AIF WORLD – BENGALURU

Adarsh Palm Retreat, Phase 3 Apartments, Tower 7, Flat P103, Bellandur, Bangalore 560103

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(tel: +919899840890)