

Motilal Oswal Value Strategy 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

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Prateek Agrawal
MD & CEO

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Investment Objective

Motilal Oswal Value Strategy PMS aims to benefit from the long term compounding effect on investments done in good businesses, run by great business managers for superior wealth creation.

Investment Strategy

Motilal Oswal Value Strategy PMS follows a value based stock selection strategy.

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

Buy Right & Sit Tight, along with QGLP (Quality, Growth, Longevity, and Price) is what the strategy focuses on. This aims at a likely earning of 20-to-25% on net worth. A balance between Growth & Value is maintained by following a bottom-up approach. The construct of about 20 stocks has a long-term view along with margin of safety – purchasing a piece of great business at a fraction of its true value.

Investment Philosophy

Motilal Oswal Value Strategy PMS 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 – (QGLP)

"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

i (<https://www.pmsaifworld.com/what-is-qrc>)



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Motilal Oswal Multifactor
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We offer responsible, long term investment service. Invest with us in the best quality products and make informed investment decisions.

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