

# MULTIPLY YOUR GROWTH POTENTIAL



Introducing

## MOTILAL OSWAL MULTI CAP FUND

Aim to benefit from a fund investing in opportunities across Large, Mid and Small cap companies

**NFO Period**

**28<sup>th</sup> May - 11<sup>st</sup> June 2024**

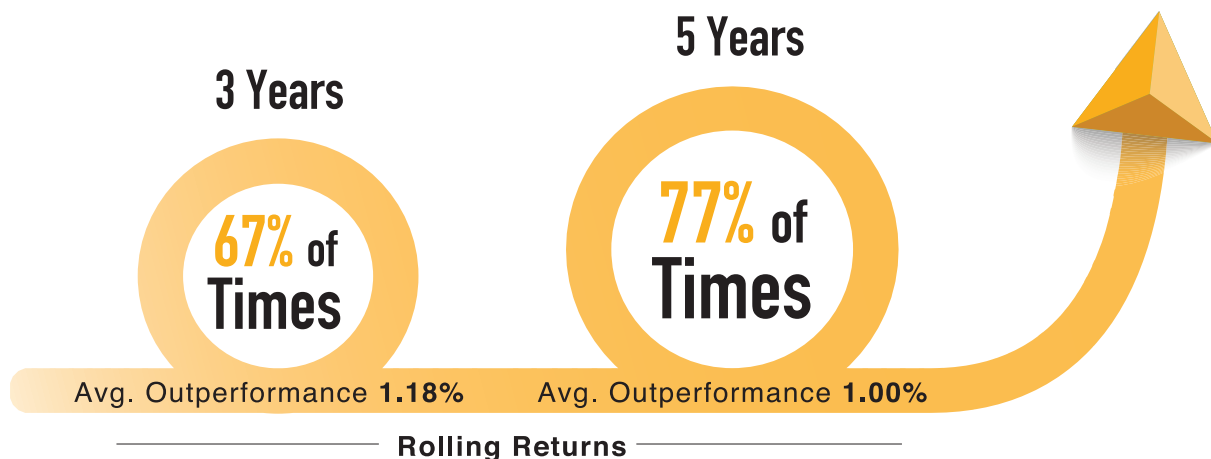
### FEATURES

- 1 Active Management**  
with portfolio curation to capture the best opportunities & growth potential
- 2 Balanced Allocation**  
enables diversified investment of Minimum 25% each across market caps
- 3 Hi-Quality & Hi-Growth**  
investing philosophy recognizes the quality business & management.
- 4 Hi-Growth Themes**  
exposure through house identified themes

### WHY MULTI CAPS?

#### Diversification & Dedicated Allocation Pays

Outperformance of The Multi Cap Index over Nifty 500



Source : MOAMC Internal. Index Values from MFI Explorer. Data Period: 31st March 2010 to 31st March 2024. Nifty 500 Multicap 50:25:25 Index and Nifty 500 Index portfolio details are as of 31st March 2024. Nifty 500 Index Market Cap Weights LC 73%, MC 17%, SC 10%

# Unique Opportunities Across Market Cap Segments



## LARGE CAP

Aerospace and Defence, Telecomm Services, Infrastructure Developers & Operators, Non-ferrous metals, Tobacco Products.



## MID CAP

Realty, Tyres, Capital Goods- Electrical Equipment, Cables, Fertilizers.



## SMALL CAP

Capital Goods - Non Electrical Equipment, Shipping, Castings, Forgings & Fasteners, Stock/Commodity Brokers, Sugar, Paper

## WHY MOTILAL OSWAL MULTI CAP FUND?

### A Unique High Conviction Multi Cap Portfolio

- ◆ A Boutique Product offering on Mutual Fund Platform
- ◆ Uniquely positioned high conviction portfolio of ~35 stocks.
- ◆ QGLP (Quality, Growth, Longevity and Price) Investment Philosophy
- ◆ Managed by,
  - ◆ Chief Investment Officer- Niket Shah (exemplary track record of focused Hi-Conviction investing in Midcap & Flexi Cap Fund)
  - ◆ Ajay Khandelwal (expertise in managing Small Cap oriented Fund)
- ◆ Skin in the Game, by promoter during NFO
- ◆ Long & successful track record of wealth creation
- ◆ Focused allocation to house identified Hi-Growth Theme across market cap spectrum

Health Care Ecosystem	Financialisation	Tech & Tech Services	China + 1	Make in India	Urbanization	Telecom
Hospitals	High AUM growth Retail Focused Lenders	New Age Consumer Tech	Chemicals	Auto+EV	Leisure and Luxury	Services
	Capital Market Companies	High Growth Tech Companies	Electronic Manufacturing Services	Capital Goods & Engineering	Travel & Hospitality	Equipment & Infra Services
	Health & Life Insurance		Textiles & Garments	Infrastructure Ancillaries	Premiumization	
				Renewable power		

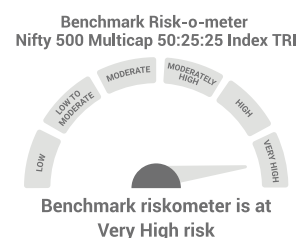
#### Name of the scheme

Motilal Oswal Multi Cap Fund (An open-ended equity scheme investing across large cap, mid cap, small cap stocks)

#### This product is suitable for investors who are seeking\*

- Long term capital growth.
- Investments in equity and equity related instruments across large cap, mid cap, small cap stocks

\*Investors should consult their financial advisers if in doubt about whether the product is suitable for them.



The product labelling assigned during the NFO is based on internal assessment of the scheme characteristics or model portfolio and the same may vary post NFO when the actual investments are made.

Source: ICRA, Motilal Oswal Internal Analysis. Data as of Nov'23. Disclaimers and Risk Factors: Past performance may or may not be sustained in future. The above data is used to explain the concept and is for illustration purpose only and should not be used for development or implementation of an investment strategy. The above construct is based upon our current fund management/ investment strategy. However the same shall be subject to change basis the disclosures made in the SID and KIM of the scheme. The portfolio rebalancing shall be done on a quarterly basis. The information contained in this document is for general purposes only and not a complete disclosure of every material fact and terms and conditions. The information / data herein alone is not sufficient and shouldn't be used for the development or implementation of an investment strategy and should not be construed as investment advice to any party. The sectors mentioned herein is for general knowledge purpose and shall not be construed as an investment advice to any party. MOAMC does not take the responsibility for the authenticity of the above information/news/data. The statements contained herein may include statements of future expectations and other forward-looking statements that are based on our current views and assumptions and involve known and unknown risks and uncertainties that could cause actual results, performance or events to differ materially from those expressed or implied in such statements. Readers shall be fully responsible / liable for any decision taken on the basis of this document and make their own investigation and seek appropriate professional advice. Past performance may or may not be sustained in future. The above graph is used to explain the concept and is for illustration purpose only and should not be used for development or implementation of an investment strategy. Other Fund Managers: Atul Mehra, Santosh Singh, Rakesh Shetty, Ankush Sood. The term 'Hi-Quality and Hi-Growth Portfolios' refer to Motilal Oswal AMC's defined fund management processes based on internal qualitative and quantitative research parameters & not be construed as investment advice to any party. Mutual Fund investments are subject to market risks, read all scheme related documents carefully.

**THINK EQUITY**  
**THINK MOTILAL OSWAL**

**MOTILAL OSWAL**  
MUTUAL FUND