



Intelligent Advisory Portfolios

Alpha Bluechip

▶ What is Alpha Bluechip?

Alpha Bluechip is an unconstrained, concentrated portfolio of best-in-class companies across different sectors and market capitalizations. A high quality growth portfolio which intends to generate superior risk adjusted returns.

Key Features



▶ Investment Universe, Process & Strategy

- Defined investment universe to include companies with good quality businesses, strong track record and corporate governance
- Confluence of Sector/Company research; Regular expert/ management interaction
- Portfolio Construction based on best ideas on bottoms up basis
- Zero tolerance to Quality risk; Minimize Price/Volatility & Liquidity risk

USP



Investment in companies with Sustainable Quality Growth to ensure compounded returns



Low Mortality Portfolio

▶ Rebalancing Strategy

- Change in the outlook on business growth
- New idea generation

▶ For Whom?

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

▶ Basic Details

NO. OF STOCKS
15-20

BENCHMARK
Nifty 200

RISK
Moderate

TIME FRAME
3-5 years

RIA

Alpha Bluechip Performance





	Feb-22(%)	3 M(%)	6 M(%)	1 Yr.(%)	LTD(%)
ALPHA BLUECHIP	-3.6	1.3	7.9	-	29.2
NIFTY 200	-3.5	-1.9	-1.9	-	13.6

*Launch Date April 2021. Performance as on 28th Feb 2022

Top Stock Holding



LUMP SUM

-  **Option:** One Time Investment
-  **Min Amount:** 5 lakhs
-  **Top Up:** Min ₹1 Lakh and multiples of ₹1000
-  **Subscription Model:** Upfront Subscription

Charges of Alpha Bluechip Subscription

Upfront Subscription

- RIA Charges:** 2% p.a (Chargeable Half yearly at 1% for 6 months)
- Brokerage:** 0.50% + statutory costs

How to subscribe to Charges of Alpha Bluechip Subscription through MOFSL?

- Step 1:** Log in to MO Investor App > From Main menu select Invest Now
Log in to MO Investor Web > Select Help Me Invest

- Step 2:** Select Intelligent Advisory Products > Select Alpha Bluechip
- 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  MO Investor App

Available on Android & Apple



For more information, email us - iapquery@motaloswal.com



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.motaloswal.com.
Correspondence Office Address: Palm Spring Centre, 2nd 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; Investment Adviser: INA000007100; 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 • Real Estate is offered through Motilal Oswal Real Estate Investment Advisors II Pvt. Ltd. which is a group company of MOFSL. • Private Equity is offered through Motilal Oswal Private Equity Investment Advisors Pvt. Ltd which is a group company of MOFSL. • 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. PMS is not offered in Commodity Derivatives segment. Details of Compliance Officer: Name: Neeraj Agarwal, Email ID: na@motaloswal.com, Contact No.:022-71881085. *MOSL has been amalgamated with Motilal Oswal Financial Services Limited (MOFSL) w.e.f August 21, 2018 pursuant to order dated July 30, 2018 issued by Hon'ble National Company Law Tribunal, Mumbai Bench. The information is only for consumption by the client and such material should not be redistributed. 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@motaloswal.com. In case of grievances for Securities Broking write to grievances@motaloswal.com, for DP to dp grievances@motaloswal.com.

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

MOFSL is acting as distributor of Investment Advisory services for Renaissance Investment Managers Private Limited: Registration No : INA000014827. 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.