

AIF Navigator



What We Offer – Ongoing Alternate Investment Fund (AIF)

Category 3 AIF

- PGIM India Equity Growth Opportunities Fund Series II
- Motilal Oswal Mid to Mega Series III
- Renaissance India Next Fund IV
- Motilal Oswal Wealth Delphi Equity Fund
- Ikigai Emerging Equity Fund
- Motilal Oswal Founders Fund
- Motilal Oswal Hedged Equity Multifactor
- Clarus Capital Fund
- Motilal Oswal Select Opportunities Fund Series IV
- Motilal Oswal Founders Fund – Series V

Category 2 AIF

- MO Alts IREF VI
- First Bridge India Growth Fund
- Vivriti Diversified Bond Fund – Series II
- India Business Excellence Fund V

Our bouquet of AIF (CAT 3) offerings

Scheme	Fund Manager	Launch Date	AUM (Rs Cr.)	Open/Close Ended	1 st Close Date	Performance (%)					Factsheet	PPT
						3 months	6 months	1 Year	3 Years	Since Inception		
PGIM India Equity Growth Opportunities Fund Series II	Aniruddha Naha	13-Oct-24	169*	Close Ended	Nov-24	-4.81	--	--	--	-15.0	Link*	Link*
Motilal Oswal Mid to Mega Series III	Rakesh Tarway	May-25	--	Close Ended		Portfolio under construction					--	Link
Renaissance India Next Fund IV	Pankaj Murarka	02-Dec-24	186**	Open Ended	--	15.3	--	--	--	-6.1	Link	Link
Motilal Oswal Wealth Delphi Equity Fund	Nitin Shanbhag	Nov-24	--	Open Ended		Portfolio under construction					--	Link
Ikigai Emerging Equity Fund	Pankaj Tibrewal	19-Jun-24	2,807	Open Ended	--	-2.3	-9.1	--	--	-8.3	Link*	Link*
Motilal Oswal Founders Fund	Abhishek Anand	11-Nov-24	330	Open Ended	--	21.0	-3.1	--	--	1.0	Link*	Link
Motilal Oswal Hedged Equity Multifactor^	Bijon Pani	14-Feb-22	569	Open Ended	--	9.2	-8.5	-7.8	18.1	13.7	Link*	Link
Clarus Capital Fund	Soumendra Lahiri	04-May-23	2,500	Open Ended	--	14.3	-1.2	23.3	--	27.4	Link	Link
Motilal Oswal Select Opportunities Series IV	Vaibhav Agrawal	19-Apr-24	1,148	Close Ended	Apr-24	19.6	-2.3	27.3	--	29.3	Link*	Link
Motilal Oswal Founders Fund Series V	Dhaval Mehta	23-Jan-25	211	Close Ended	Jan-25	21.1	--	--	--	16..0	Link*	Link

Data as on 31st May 2025 | *Latest One pager & PPT would be updated in the link as and when we receive it from AMC, |** Indicates commitment recieved| ^ - Close Ended option is also available

PGIM India Equity Growth Opportunities Fund Series II

- The fund is focused on small and micro-cap companies, targeting high-growth segments.
- It follows a bottom-up investment approach driven by strong fundamentals, and maintains a well-diversified portfolio of 30-40 stocks.

Large	Mid	Small & Micro	Cash
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*Ratio	Portfolio	Nifty Microcap 250
P/E	--	23.6
P/B	--	3.3

Source: AMC / As on 30th Apr 2025 / *Ratio mentioned is 1 yr Trailing.

Fund Manager	AUM (Rs. Crs)
Aniruddha Naha	169

Launch Date	13-10-24
Fund Type	Close Ended

CAGR %	Portfolio	Nifty Microcap 250
SI	-15.0	-17.9

Months	12M-24M	24M Onwards
Exit Load %	1%	Nil

# of Holdings	Listed %	Unlisted %
34	100	-

Top 5 Holdings Weight = 29.6%	
Script	Weight %
Data Patterns India Limited	8.3
Shyam Metalics and Energy Ltd	6.2
Aarti Pharmalabs Limited	5.3
Tips Industries Limited	4.9
Dollar Industries Limited	4.9

Top 5 Sectors Weight = 77.0%	
Sector	Weight %
Capital Goods	41.6
Healthcare	19.1
Services	6.5
Media & Entertainment	4.9
Textiles	4.9

MOAMC Mid to Mega Series III

- The fund targets companies positioned in the mid-cap range showcasing potential to transition in the mega-cap category
- By focusing on stocks experiencing upward momentum, it aims to capitalize and capture value of their growth.

Large	Mid	Small	Cash
--	--	--	--

*Ratio	Portfolio	BSE 500
P/E	--	25.0
P/B	--	4.1

Source: AMC / As on 31st May 2025 / *Ratio mentioned is 1 yr Trailing.

^ Exit load from 1st close

Fund Manager	AUM (Rs. Crs)
Rakesh Tarway	--

Launch Date	May-25
Fund Type	Close Ended

CAGR %	Portfolio	BSE 500
SI	-	-

Years	1 Yr	1 Yr-2Yr	2Yr-3Yr	3Y Onward
Exit Load %	3%	2%	1%	-

# of Holdings	Listed %	Unlisted %
--	--	--

Top 5 Holdings Weight =	
Script	Weight %
Portfolio under Construction	

Top 5 Sectors Weight = 77.0%	
Sector	Weight %
Portfolio under Construction	

Renaissance India Next Fund (CAT 3)

- A concentrated portfolio that invests in companies across businesses which are at different states of their business lifecycles.
- Fund follows framework of Sustainable Quality Growth at Reasonable Price (SQGARP).

Large	Mid	Small	Cash
58.0	21.0	21.0	-

*Ratio	Portfolio	Nifty 200
P/E	23.6	23.4
P/B	3.1	3.9

Source: AMC | As on 31st May 2025 | *Ratio mentioned is 1 yr Trailing.

Fund Manager	AUM (Rs. Crs)
Pankaj Murarka	186 Commitment

Launch Date	02-12-24
Fund Type	Open Ended

CAGR %	Portfolio	Nifty 200
SI	-6.1	0.6

Months	Upto 2 Yr	2 Yr Onwards
Exit Load %	1%	Nil

# of Holdings	Listed %	Unlisted %
42	100%	-

Top 5 Holdings Weight = 27.08%	
Script	Weight %
HDFC Bank Ltd	8.60
Infosys Ltd	5.24
Reliance Industries Ltd	4.61
Tech Mahindra Ltd	4.37
HDFC AMC LTD	4.26

Top 5 Sectors Weight = 74.34%	
Sector	Weight %
BFSI	36.98
Consumer Discretionary	12.03
Information Technology	11.37
Pharma & Chemicals	7.65
Industrials	6.31

MOPW Delphi Equity Fund (CAT 3)

- It is a FoF that would invest in CAT III AIFs managed by boutique equity managers
- It targets to generate consistent returns by a prudent combination of strategies investing across various market segments

Large	Mid	Small	Cash
--	--	--	--

*Ratio	Portfolio	Nifty 500
P/E	--	24.6
P/B	--	3.9

Source: AMC | As on 31st May 2025 | *Ratio mentioned is 1 yr Trailing.

Fund Manager	AUM (Rs. Crs)
Nitin Shanbhag	--

Launch Date	Nov-24
Fund Type	Open Ended

CAGR %	Portfolio	Nifty 500
SI	--	--

Months	Upto 1 Yr	1 Yr Onwards
Exit Load %	2%	Nil

# of Holdings	Listed %	Unlisted %
--	--	--

Top 5 Holdings Weight =	
Script	Weight %
Portfolio under construction	

Top 5 Sectors Weight =	
Sector	Weight %
Portfolio under construction	

IKIGAI Emerging Equity Fund (CAT 3)

- The fund looks to invest in high quality businesses which can generate high ROCE and are run by honest promoters.
- The fund follows a broad investment approach of MBV (Management, Business & Valuation) wherein they look to generate a higher risk adjusted return.

Large	Mid	Small	Cash
8.9	43.5	45.0	2.6

*Ratio	Portfolio	Nifty Midcap 150
P/E	23.0	33.2
P/B	-	4.8

Source: AMC | As on 30th Apr 2025 | *Ratio mentioned is 1 yr Trailing.

Fund Manager	AUM (Rs. Crs)
Pankaj Tibrewal	2,807

Launch Date	19-06-24
Fund Type	Open Ended

CAGR %	Portfolio	Nifty Midcap 150
SI	-8.3	-4.5

Months	1 Yr	1 Yr Onwards
Exit Load %	2%	Nil

# of Holdings	Listed %	Unlisted %
30-40	100	-

Top 5 Holdings Weight = 18.5%	
Script	Weight %
Styrenix Performance Materials	4.6
Ajanta Pharma Ltd	4.2
Alkyl Amines Chemicals Ltd	3.4
VST Tillers Tractors Ltd	3.4
Ipca Laboratories Ltd	2.9

Top 5 Sectors Weight = 74.5%	
Sector	Weight %
Consumer Discretionary	18.8
Industrial	18.7
Financials	13.4
Healthcare	12.2
Materials	11.3

MOAMC Founders Fund (AIF CAT 3)

- The fund's primary focus is on choosing excellent firms led by skilled leadership. This ensures a compelling potential for success in the medium term.
- It aims to participate in sectors and themes favoured by strong economic tailwinds & a high probability of success in the medium term.

Large	Mid	Small	Cash
18.3	38.5	39.8	4.7

*Ratio	Portfolio	BSE 500
P/E	-	25.0
P/B	-	4.1

Source: AMC | As on 31st May 2025 | *Ratio mentioned is 1 yr Trailing.

^ Exit load from 1st close

Fund Manager	AUM (Rs. Crs)
Abhishek Anand	330

Launch Date	11-11-24
Fund Type	Open Ended

CAGR %	Portfolio	BSE 500
SI	1.0	0.4

Months	1 Yr	1 Yr Onwards
Exit Load %	1%	Nil

# of Holdings	Listed %	Unlisted %
27	100	-

Top 5 Holdings Weight = 24.4	
Script	Weight %
PTC Industries Ltd	5.3
Suzlon Energy Ltd	4.8
Eternal Ltd	4.8
Piramal Enterprise Ltd	4.8
Radico Khaitan Ltd	4.7

Top 5 Sectors Weight = 70.7	
Sector	Weight %
Renewable Energy	17.8
Urbanization	17.7
Capital Goods	12.6
Electronic Goods	11.5
Technology	11.0

MOAMC Hedged Equity Multifactor (OPEN ENDED) (AIF CAT 3)

- The investment objective of the Motilal Oswal Hedged Equity Multifactor Strategy is to invest in a basket of companies based on growth & Momentum using Factor-based investing with Hedge against Tail Risk events.

Large	Mid	Small	Others & Cash
27.9	52.7	15.6	1.0

*Ratio	Portfolio	Nifty 500 TRI
P/E	-	24.6
P/B	-	3.9

Source: AMC | As on 31st May 2025 | *Ratio mentioned is 1 yr Trailing.

Fund Manager	AUM (Rs. Crs)
Bijon Pani	569

Launch Date	14-02-2022
Fund Type	Open Ended

CAGR %	Portfolio	Nifty 500 TRI
1 Yr	-7.8	9.0
3 Yr	18.1	18.4
SI	13.7	14.9

Year	Upto 1 Yr	After 1 Yr
Exit Load %	2%	Nil

# of Holdings	Listed %	Unlisted %
38	100	-

Top 5 Holdings Weight = 23.1%	
Script	Weight %
Indus Towers Ltd	6.0
Muthoot Finance Limited	4.8
Petronet Lng Limited	4.2
Alkem Laboratories Limited	4.1
Eicher Motors Ltd.	4.1

Top 5 Sectors Weight = 63.1	
Sector	Weight %
Healthcare	28.3
Fast Moving Consumer Goods	10.5
Financialization	9.6
Oil, Gas & Consumable Fuels	8.2
Metals & Mining	6.6

Clarus Capital Fund (AIF CAT 3)

- The investment objective of fund is to invest in sectors that have a stronger ROE metrics than the benchmark index. This would enable the fund to capitalize on long term growth prospects & deliver superior risk adjusted returns.
- The fund would be of companies that are fundamentally strong and high resilient to market volatility.

Large	Mid	Small	Cash
23.0	10.0	65.0	2.0

*Ratio	Portfolio	BSE 500 TRI
P/E	26.0	25.0
P/B	-	4.1

Source: AMC | As on 31st May 2025 | *Ratio mentioned is 1 yr Trailing.

Fund Manager	AUM (Rs. Crs)
Soumendra Lahiri	2,500

Launch Date	04-05-2023
Fund Type	Open Ended

CAGR %	Portfolio	BSE 500 TRI
1 Yr	23.3	8.5
SI	27.4	21.5

Year	1 Yr	2 Yr	2 Yr +
Exit Load %	2%	1%	Nil

# of Holdings	Listed %	Unlisted %
NP	100	-

Top 5 Holdings Weight = NP	
Script	Weight %
Aadhar Housing	NP
Axis Bank	NP
Cyient	NP
Federal Bank	NP
HDFC Bank	NP

Top 5 Sectors Weight = 89%	
Sector	Weight %
FS-Lending	26
IT	21
Healthcare	15
FS-Non lending	14
Manufacturing	13

MOAMC Select Opportunities Fund Series IV (AIF CAT 3)

- The fund strives to take advantage of possibilities given by strong market dynamics and favourable economic currents, with a primary focus on choosing excellent firms led by skilled leadership.
- The fund would be taking exposure in unlisted opportunities to ensures a compelling potential for success in the medium term.

Large	Mid	Small	Others & Cash
14.9	28.1	31.6	19.0

*Ratio	Portfolio	BSE 500
P/E	--	25.0
P/B	--	4.1

Source: AMC / As on 31st May 2025 / *Ratio mentioned is 1 yr Trailing.

Fund Manager	AUM (Rs. Crs)
Vaibhav Agrawal	1,148

Launch Date	19-04-2024
Fund Type	Close Ended

CAGR %	Portfolio	BSE 500
SI	29.3	10.3

Months	36-48	48-60
Exit Load %	3%	2%

# of Holdings	Listed %	Unlisted %
29	87.1	12.9

Top 5 Holdings Weight = 26.6%	
Script	Weight %
Jain Resource Recycling Ltd	8.8
Onesource Specialty Pharma Ltd	6.0
Zepto Ltd	4.2
PTC Industries Ltd	3.9
Inox Wind Ltd	3.8

Top 5 Sectors Weight = 64.9%	
Sector	Weight %
Urbanization	14.4
Manufacturing	14.3
Renewable Energy	13.8
Technology	12.6
Capital Goods	9.9

MOAMC Founders Fund Series V (AIF CAT 3)

- The fund's main objective would be Capital Preservation & Capital Appreciation.
- It looks to achieve both the objective by focusing on companies which have high ROCE and Earnings Growth where the promoters have a significant skin in the game.

Large	Mid	Small	Cash
18.9	37.9	35.4	4.5

*Ratio	Portfolio	BSE 500
P/E	-	25.0
P/B	-	4.1

Source: AMC / As on 31st May 2025 / *Ratio mentioned is 1 yr Trailing.

Fund Manager	AUM (Rs. Crs)
Dhaval Mehta	309

Launch Date	23-01-2025
Fund Type	Close Ended

CAGR %	Portfolio	BSE 500
SI	16.0	8.9

Year	Upto 1 Yr	After 1 Yr
Exit Load %	1	Nil

# of Holdings	Listed %	Unlisted %
27	100.0	-

Top 5 Holdings Weight =	
Script	Weight %
Waaree Energies Ltd	5.0
Suzlon Energy Ltd	4.8
Onesource Specialty Pharma Ltd	4.5
Apar Industries Ltd	4.3
Eternal Ltd	4.0

Top 5 Sectors Weight = 68.1%	
Sector	Weight %
Renewable Energy	17.4
Urbanization	17.2
Capital Goods	12.0
Financialization	11.1
Electronic Goods	10.4

Overlap of Stocks within offerings – AIF CAT 3

Stock Universe	# of Stocks
Universe of Stocks	137
Unique # of Stocks	107
# of Stocks common (Count)	30

Strategies (Total No. of stocks)	MO Founders (27)	MO Founders V (27)	MOAMC HEMSA (38)	MOAMC SOP IV (29)	PGIM India EGO II (34)	Renaissance INP IV (42)
MO Founders (27)	0(0%)	--	--	--	--	--
MO Founders V (27)	27(98%)	0(0%)	--	--	--	--
MOAMC HEMSA (38)	2(2%)	2(2%)	33(87%)	--	--	--
MOAMC SOP IV (29)	27(81%)	27(81%)	2(7%)	2(13%)	--	--
PGIM India EGO II (34)	0(0%)	0(0%)	0(0%)	0(0%)	34(100%)	--
Renaissance INP IV (36)	1(2%)	1(2%)	3(5%)	1(2%)	0(0%)	38(94%)

Our bouquet of AIF (CAT 2) offerings

Scheme	Type	Fund Manager	Launch Date	1 st Close Date	Upfront Contribution	Tenure after 1 st Close	Indicative Pre-tax IRR (%)	Target Corpus (Rs cr)	Commitment Received (Rs cr)	Open/Close Ended	Factsheet	PPT
MO Alts India Realty Excellence Fund VI (IREF)	Real Estate	Saurabh Rath	Aug 2023	Feb 2024	60%	7 years	20	2,000+750	1,910	Close Ended	Link*	Link*
MO Alts India Business Excellence Fund V	Private Equity	Vishal Tulsyan	Apr 2025	May 2025	15%	11 years	26-28^	6500+1500	3500	Close Ended	New Offer	Link*
Vivriti Diversified Bond Fund – Series II	Private Credit	Nischal Shah	Dec 2023	Feb 2024	<5 cr-10% >5 cr- 5%	5 years	15-16	1500+500	955	Close Ended	Link	Link
First Bridge India Growth Fund	Late Stage	Vishal Gupta	Mar 2023	May 2023	60%	8 years	25	1200+300	735	Close Ended	Link*	Link*

MO Alts IREF VI (AIF CAT 2)

- MO Alts has focussed on real estate investing since 2009, managing over Rs 7,500cr of cumulative AUM across past real estate funds, with 82 exits already done at ~20% IRR
- IREF 6th series aims to invest in 15-40 transactions (50% in high-yield debt) across top quality developers, primarily focusing on Tier 1 cities, early-stage (land-buying stage) and mainly residential projects (minimum 65% of corpus).
- Sponsors and Team of MO Alts have themselves invested Rs 210cr in the fund

Source: AMC / As on 31st May 2025

Fund Manager	Commitment Received	Target Corpus
Saurabh Rath	1,910 cr	2,000 + 750 cr
Launch Date		20-08-2023
1 st Close Date		14-02-2024
Tenure from 1 st close		7 years
Extension		+1 yr and +1 yr
Min. Commitment		Rs 2 crore
Indicative Pre-tax IRR %		20%
Tax at		Client Level
Exit Load %		No exit option
Redemption		NA
Fund Type		Close ended

Indicative	Upfront	Rest
Cumulative Drawdown %	60%	In tranches

Opportunity in Real Estate

- With declines in interest rate and with only 11 months of RE inventory left, now could be an opportune time to fund real estate projects for high yields, backed by strong security measures.
- Banks and HFCs are not allowed to finance land acquisition and RBI has put major lending restrictions on NBFCs, providing an opportunity for such early stage – debt/ mezzanine oriented funds, targeted towards land acquisition in residential projects.

MO Alts IBEF V

- Private Equity fund focusing on providing growth capital to mid-market companies.
- Employs the QGLP philosophy, emphasizing business **Q**uality, **G**rowth, **L**ongevity (15-20 years), and **P**rice (reasonable valuation with a safety margin).
- Aims to prioritize investments in market-leading companies, ideally those led by first-generation entrepreneurs

Indicative	Upfront	Every Year
Cumulative Drawdown %	15%	~35%

Source: AMC / As on 31st May 2025

Fund Manager	Commitment Received	Target Corpus
Vishal Tulsyan	3500 cr	6500 + 1500 cr
Launch Date		Apr 2025
1 st Close		May 2025
Tenure from 1 st close		11 years
Extension		+1 yr and +1 yr
Min. Commitment		Rs 5 crore
Indicative Pre-tax IRR %		26-28%
Tax at		Client Level
Exit Load %		No exit option
Redemption		NA
Fund Type		Close ended

Past Performance	Fund I	Fund II	Fund III	Fund IV
Size (INR)	550 cr	1,000 cr	2,300 cr	4,500 cr
Vintage	2007	2013	2018	2022
Gross IRR	27%	18%	28%	28%
Gross MOIC	6.0x	4.0x	3.7x	1.5x
Net MOIC	4.5x	3.3x	2.8x	1.3x
Distributed Capital (INR)	4.4x	2.4x	0.3x	-
DPI + Liquid Shares (INR)	4.4x	2.4x	0.7x	0.1x
Investments	13	11	11	13
Exits	Fully Exited	5 Exits	1 Partial	-

Vivriti Diversified Bond Fund – Series II

- The fund focuses on mid-sized firms that demonstrate:
 - Established Business Models
 - Revenue Scale of ₹250 crore to ₹5,000 crore
 - Sustainable earnings margins of 8%-18%
 - Operational track records spanning 7 to 15 years
- Provides capital for growth and value creation, including:
 - Enhancing working capital.
 - Funding capital expenditures (CapEx).
 - Supporting product development
 - Refinance
- The fund's mode of investment includes 2 to 4-year debentures, secured by receivables, immovable assets, or guarantees.

Source: AMC / As on 31st May 2025

Fund Manager	Commitment Received	Target Corpus
Nischal Shah	801 cr	1500 + 500 cr
Launch Date	Dec 2023	
1 st Close	Feb-2024	
Tenure from 1 st close	5 years	
Extension	NA	
Min. Commitment	Rs 1 crore	
Indicative Gross IRR %	15-16%	
Tax at	Client Level	
Exit Load %	No exit option	
Redemption	NA	
Fund Type	Close ended	

Top 5 Holdings	Invested Amount
Lendingkart Finance Limited	75 cr
Curated Living Solution Private Ltd.	50 cr
Just Udo Aviation Private Limited	48 cr
Indifi Capital Private Limited	38 cr
Holisol Logistics Private Limited	30 cr

Portfolio Composition	Holding %
Unsecured SME	22.0
Co-Living	15.0
Regional Airline	14.0
MSME Lending	11.0
Road EPC	10.0

First Bridge India Growth Fund (AIF CAT 2)

- Primarily invests in high-quality businesses led by first-generation entrepreneurs,
- Commits/invests substantial capital in companies, ensuring alignment of interests, and maintaining rigorous risk management and governance standards.
- Focuses on Consumer, Financial Services, Manufacturing, Business Services companies
- Aims to ensure that not more than 40% of fund corpus is invested in a single sector and not more than 10% in a single company.

Source: AMC / As on 31st May 2025

Fund Manager	Commitment Received	Target Corpus
Vishal Gupta	735 cr	1200 + 300 cr
Launch Date	31-03-2023	
1 st Close Date	10-05-2023	
Tenure from 1 st close	8 years	
Extension	+1 yr and +1 yr	
Commitment Required	Rs 1 crore	
Indicative Pre-tax IRR %	25%	
Tax at	Client Level	
Exit Load %	No exit option	
Redemption	NA	
Fund Type	Close ended	

Company Name	Sector	Amount (in cr)
Mahaveer Finance India Ltd ("MFIL")	Financial Services	100
LEAP India	Consumer businesses	60
Bagzone Lifestyle Private Ltd (Lavie).	Consumer businesses	57
OJB Herbals Pvt Ltd	Consumer businesses	50

Indicative	Start	Every Quarter
Cumulative Drawdown %	60%	~10%

Thank You!

Motilal Oswal Financial Services Limited (MOFSL)* Member of NSE, BSE, MCX, NCDEX CIN No.: L67190MH2005PLC153397

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***Such representations are not indicative of future results.**

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

Humbled to receive Multiple Awards



Consistently featured in
'Fortune 500 (India)' from 2020
to 2023



Featured in **'Forbes Super 50
Companies'** in 2017.



Awarded **'Brand of the Year'** at
the CNBC TV18 - India Business
Leadership Awards 2018.



Inducted into the **'HALL OF
FAME'** at the CNBC 10th Financial
Advisor Awards 2019.



Enters the Limca Book of
Records for creating **India's
Largest Dealing Room** in 2009.



Consistently **ranked among
the top 3 for Best Brokerage
(India)** for over a decade at the
Asiamoney Brokers Poll.