MO Quant
Zodiac
Model Portfolio - July 2026

Investment Philosophy

Data. Rules. Discipline

A signal-based, bias-free framework rigorously back-tested and systematically engineered for superior long-term wealth creation.

Portfolio Type	No. Of Stocks	Rebalancing
Large Cap	**12**	**Quarterly**
	8.3% equal weight each	Earnings driven

Why Quant MP

A structured, rule-based approach that removes emotion & subjectivity from stock selection applying the criteria across every market cycle to build portfolios grounded in data.

Concentrated Portfolio

12 high-conviction stocks, each with equal 8.3% allocation designed to maximize upside potential while maintaining disciplined risk management.

How Quant MP works

Stocks pass through price, sector and upside filters before the Ranking Engine evaluates each on five dimensions Upside, Sector, Momentum, EPS, and ROE to determine final selection.

Why this matter

Three rigorous layers evaluate every stock, removing weak signals early, rule-based discipline, and ranking high-conviction stocks bringing systematic precision to your portfolio.

Quarterly Rebalancing

Portfolio is reassessed every quarter, post results season, to reflect updated earnings, revised targets, and shifting analyst convictions systematically rebalancing.

Why this is the future

Rule-based, research backed quant investing is the global preference offering consistency, clarity, and a structured path to long term wealth creation.

""We combine the analytical depth of systematic research with the precision of quantitative discipline giving our clients access to data-driven ideas, free from bias, built for performance."

MO QUANT ZODIAC· INVESTMENT TEAM

Portfolio Attributes

Ideal For High-Conviction, Analyst-Backed Alpha Generation

The Zodiac Portfolio is a research-driven, conviction-weighted strategy built on MOSL Research recommendation framework. Unlike pure factor models that rely solely on price-based signals, Zodiac blends fundamental strength, analyst conviction, sector stance, and disciplined risk filters to create a high-quality, large-cap–focused portfolio designed for stability and consistent alpha generation.

By integrating upside potential, earnings momentum, return on equity expansion, and stock–sector relative performance, the Zodiac Portfolio identifies fundamentally sound leaders that are not only favoured by research teams but are also outperforming their sectors in real time. This dual lens — analyst-backed fundamentals + quantitative price behaviour — positions Zodiac as a robust, forward-looking investment solution for investors seeking structured, high-conviction exposure across India's strongest sectors.

Methodology

1

Works on the top 50 listed companies by market cap.

2

Filters stocks by price, upside threshold, and overweight sector view; ranks survivors on EPS growth, ROE improvement, price strength, and sector outperformance.

3

Volatility-adjusted multiplier rewards stable performers over erratic movers; top 12 stocks selected with sector diversification caps applied.

4

Employs a systematic, repeatable, and forward looking approach to stock selection.

Portfolio Parameters

Parameters	Portfolio
Benchmark	Nifty 50
Rebalance Frequency	Quarterly
Investment Horizon	3-5 years
Risk	High
Launch Date	25 September 2025
Last Churn Date	5 June 2026

Portfolio Attributes

Know Your Factor

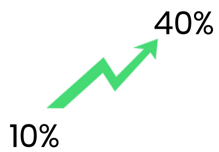
Entry Gate

1) **BUY**

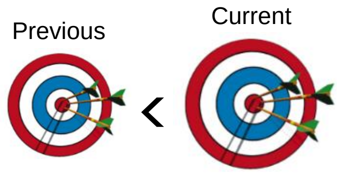
Buy Recommendation

2) 

Overweight / Neutral on Sector

3) 

Upside 10%–40%

4) 

No reduction in TP

Ranking Metrics

25%

Upside Rank

Higher Upside, Higher Rank

25%

Stock-Sector Rank

Higher Outperformance, Higher Rank

20%

Momentum Rank

Higher Upward Movement, Higher Rank

15%

EPS Rank

Higher EPS Growth, Higher Rank

15%

ROE Rank

Higher ROE Growth, Higher Rank

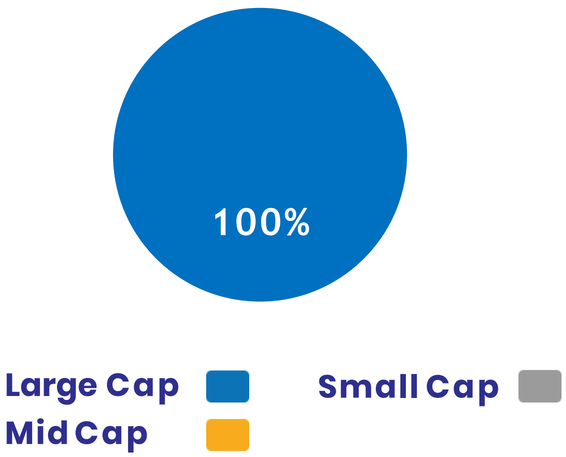
Portfolio Data Points

Portfolio Snapshot

As of: 30 June 2026 | Benchmark: Nifty 50 | Inception: September 2025

Avg. Upside	Avg. Market Cap	Portfolio ROE	Est. EPS
21.2%	**₹3,60,000 Cr**	**18.3%**	**23%**
		FY26 basis	FY27E basis

Market Cap Allocation



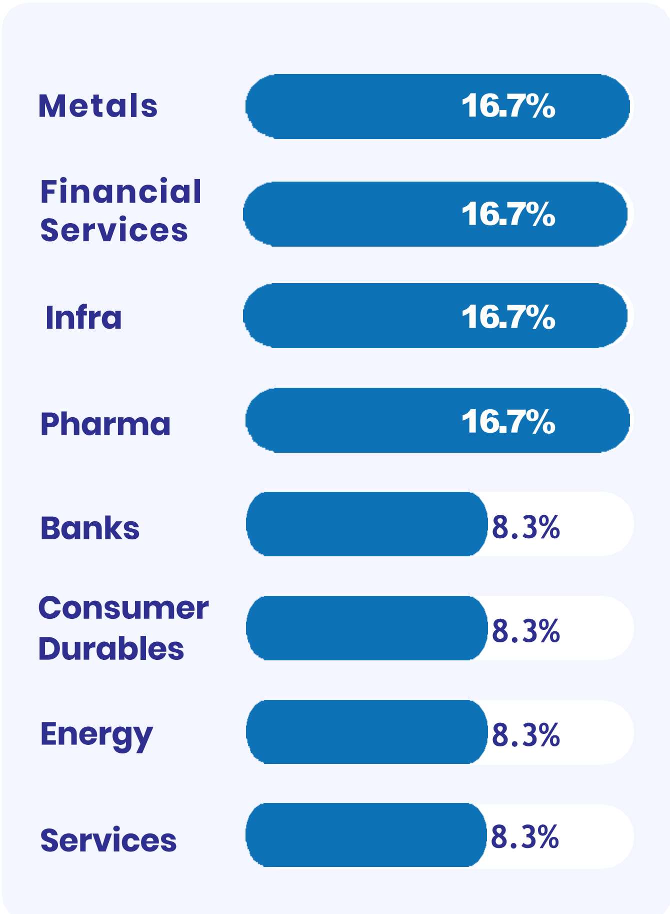
Cash
0%
(Fully Invested)

Fees
Nil

Brokerage Fees
1%

Minimum Investment
₹1,50,000

Sector Holdings



Portfolio Data Points

Portfolio Snapshot

As of: 30 June 2026 | Benchmark: Nifty 50 | Inception: September 2025

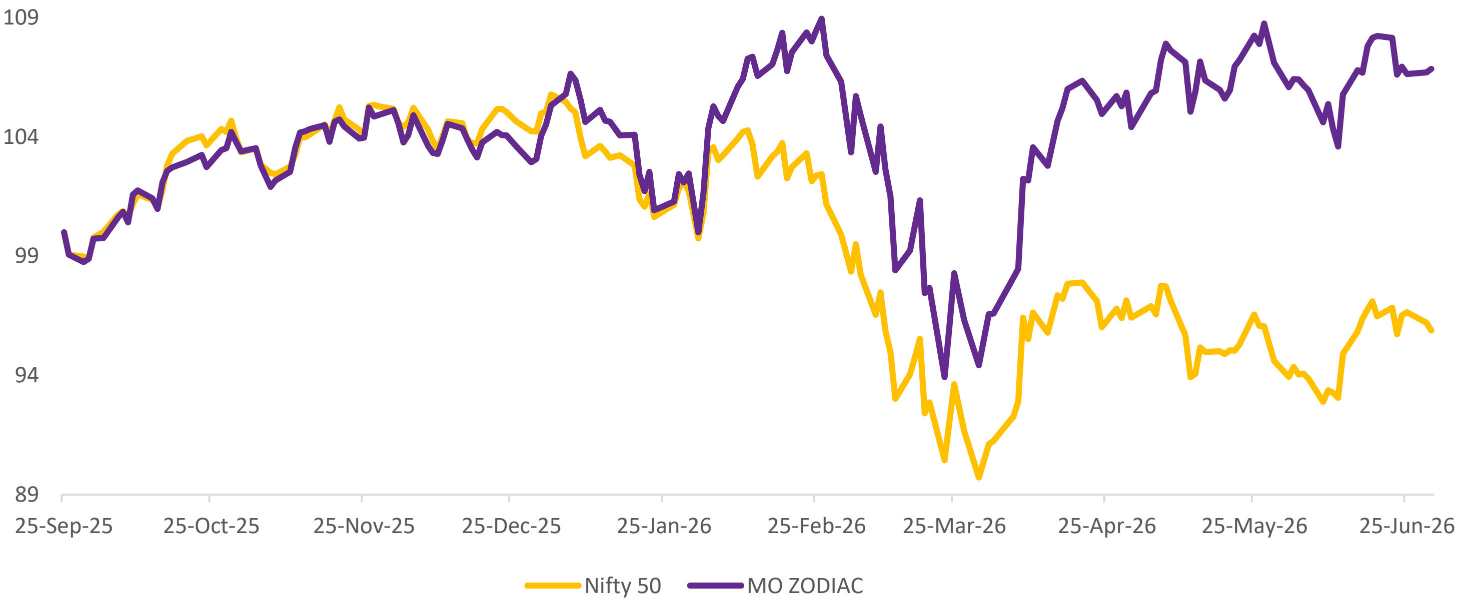
Top 5 performers

Company	Sector
ADANIPORT	**Infra**
APOLLOHOSP	**Healthcare**
LT	**Infra**
SBIN	**Bank**
HINDALCO	**Metals**

Portfolio Attributes

Attribute	Portfolio	Benchmark
Beta	**1.1**	**1**
Alpha (SI)	**10.8%**	
Std Deviation	**17%**	**14%**
Max Drawdown	**-13.8%**	**-15.2%**

Cumulative Performance



Past performance is not indicative of future results. All data as of 5 June 2026.

Notes

Disclaimer

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Date of Registration: 29 November 2021 Mr. Siddharth Karnawat (BSE Trade Name: RISHABH WEALTH MANAGEMENT PVT LTD) BSE: AP-01044601100878. Date of Registration: 26 April 2019 (NSE Trade Name: RISHABH WEALTH MANAGEMENT PVT LTD) NSE: AP0297119483.

Date of Registration: 1 June 2019. Mr. Kavish Shah (BSE Trade Name: KAVISH R SHAH) BSE: AP-0104460166797. Date of Registration: 25 July 2017 (NSE Trade Name: MR KAVISH RAMAN SHAH) NSE: APC029700501. Date of Registration: 17 October 2003. Mr. Harshit Gandhi (BSE Trade Name: GANDHI INVEST MALL) BSE: AP-0104460166662. Date of Registration: 21 July 2017 (NSE Trade Name: GANDHI INVEST MALL) NSE: AP029773951. Date of Registration: 12 August 2011 Mr. Madan Mohan Lohiya (BSE Trade Name: FINSENSE SECURITIES) BSE: AP-0104460167027. Date of Registration: 2 August 2017 (NSE Trade Name: FINSENSE SECURITIES) NSE: APF029700242. Date of Registration: 06 May 2003. Mr. Bhawarlal Agarwalla (BSE Trade Name: PUSHPGEET FINANCIAL SERVICES) BSE: AP-0104460166315. Date of Registration: 1 July 2017 (NSE Trade Name: PUSHPGEET FINANCIAL SERVICES) NSE: AP029710152. Date of Registration: 30 March 2019. Ms. Uthara Ramakrishnan (BSE Trade Name: ARTHA FINANCIAL SERVICES) BSE: AP-0104460197383. Date of Registration: 22 March 2019 (NSE Trade Name: ARTHA FINANCIAL SERVICES) NSE: AP029714701. Date of Registration: 27 March 2019. Mr. Rajendra Manudhane (BSE Trade Name: KRM SECURITIES PVT LTD) BSE: AP-0104460169451. Date of Registration: 31 October 2017 (NSE Trade Name: KRM SECURITIES PVT LTD) NSE: AP029709073. Date of Registration: 29 March 2019. Mr. Aashish Aggarwal (BSE Trade Name: TR CAPITAL) BSE: AP-0104460164130. Date of Registration: 28 April 2017 (NSE Trade Name: TR CAPITAL) NSE: AP029710027. Date of Registration: 28 April 2017. Mr. Akash Gupta & Mr. Sachindra Verma (BSE Trade Name: TRIVENTURE ADVISORY PRIVATE LIMITED) BSE: AP-0104460178408. Date of Registration: 13 July 2018 (NSE Trade Name: JUNIPER EQUITY INDIA PRIVATE LIMITED) NSE: AP029710273. Date of Registration: 18 June 2018. Mr. Manohar Bhandari (BSE Trade Name: JUNIPER EQUITY INDIA PRIVATE LIMITED) BSE: AP-0104460136432. Date of Registration: 13 November 2014 (NSE Trade Name: TR CAPITAL) NSE: AP0297086153. Date of Registration: 10 September 2014. Mr. Suresh Loya (BSE Trade Name: PRACHI INVESTMENTS PVT LTD) BSE: AP-0104460198229. Date of Registration: 30 March 2019 (NSE Trade Name: PRACHI INVESTMENTS PVT LTD) NSE: APC029700643. Date of Registration: 30 October 2003. Mr. Alex Babu (BSE Trade Name: HEDGE EQUITIES) BSE: AP-0104460119270. Date of Registration: 02 March 2021 (NSE Trade Name: HEDGE EQUITIES) NSE: AP0297135953. Date of Registration: 08 March 2021 Mr. Samir Chag (BSE Trade Name: ELEGANT WEALTH PRIVATE LIMITED) BSE: AP-01044601122419. Date of Registration: 02 July 2021 (NSE Trade Name: ELEGANT WEALTH PRIVATE LIMITED) NSE: AP0297139823. Date of Registration: 07 July 2021.