

# Invest in one of the popular indices



## Introducing Motilal Oswal Nifty 50 Index Fund

Less volatility and long term returns make Large Cap Index a popular choice among investors.

**NFO** Opens: 03<sup>rd</sup> Dec, 2019  
Closes: 17<sup>th</sup> Dec, 2019

To invest, contact your Financial Advisor or  
Call: 81086 22222 or 022-4054 8002  
Visit: [www.motilaloswalmf.com](http://www.motilaloswalmf.com)

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



Name of the scheme	This product is suitable for investors who are seeking*	Riskometer
Motilal Oswal Nifty 50 Index Fund (MOFNIFTY50) (An open ended scheme replicating / tracking Nifty 50 Index)	<ul style="list-style-type: none"> <li>Return that corresponds to the performance of Nifty 50 Index subject to tracking error</li> <li>Equity and equity related securities covered by Nifty 50 Index</li> <li>Long term capital growth</li> </ul>	<p>Investors understand that their principal will be at Moderately High risk</p>

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

Mutual Fund investments are subject to market risks, read all scheme related documents carefully



## Why invest in an Index Fund?

- Index Funds are an easy and convenient way to invest in an index (such as the Sensex and the Nifty).
- **Eliminates fund manager risk** and therefore the risk of underperforming the benchmark
- **Diversification** – Generally tracks broad based indices thus reducing the impact of decline in value of any one stock or industry, sector
- **Low Costs** – Since index funds are passively managed, cost are kept relatively low
- **Long-term** – Fund managers change and funds close down frequently. An investor who is looking to invest for over 10 years+ is better suited for index funds



## Ability to withstand downturn

	Nifty 50 TRI	Nifty Midcap 150 TRI	Nifty Smallcap 250 TRI
01 January 2008 to 27 February 2009	-49.3%	-64.4%	-68.4%
03 January 2011 to 30 December 2011	-24.1%	-31.6%	-35.8%
29 January 2018 to 28 February 2019	-1.4%	-15.5%	-29.1%

- Large caps fall less during periods of market turmoil compared to mid & small caps
- Rising global volatility warrants investment in stable segments

Source: MOFSL Report

Disclaimer: The above information is used to explain the concept and is for illustration purpose only and should not used for development or implementation of an investment strategy. Past performance may or may not be sustained in future.



## Large-cap Funds performance vs Benchmark

	1 Year	2 Years	3 Years	5 Years	7 Years	10 Years
Large-cap Funds Category Average	15.0	5.1	9.3	8.5	12.7	11.1
Top 10 Large- Cap Average (Based on 5 Year Returns)	17.3	6.9	10.9	10.0	14.1	13.1
Indices						
Nifty 50 TRI	15.9	8.7	12.7	8.8	12.7	11.0
Nifty Next 50 TRI	9.4	-0.4	8.3	11.6	16.3	13.5

- Nifty 50 TRI has outperformed the large cap funds category average for the 1, 2, 3 and 5 year period
- ETFs + index funds have grown from INR 5000 crore to over 1.5 lakh crore over last 5 years

Source: MOAMC Internal Research. Data as of 31 October 2019

Disclaimer: The above table depicts the daily rolling returns for Nifty 50 Index on compounded annualized basis from 1 January 2005 to 31 October 2019 for 1 year, 3 year & 5 year periods. It provides the maximum, minimum and average returns derived for all these time periods. Motilal Oswal AMC does not provide any guarantee/ assurance any minimum or maximum returns. Past performance may or may not be sustained in future



## About Nifty 50 Index

- The NIFTY 50 index is a well-diversified 50 companies index reflecting overall market conditions.
- NIFTY 50 Index is computed using free float market capitalization method.
- NIFTY 50 can be used for a variety of purposes such as benchmarking fund portfolios, launching of index funds, ETFs and structured products.



## About Motilal Oswal Nifty 50 Index Fund

**Type of Scheme:** An open ended scheme replicating/tracking Nifty 50 Index

**Investment Objective:** The scheme seeks investment return that corresponds (before fees and expenses) to the performance of Nifty 50 Index (underlying index), subject to tracking error. However, there can be no assurance or guarantee that the investment objective of the scheme would be achieved.

**Benchmark:** Nifty 50 Index TRI

**Exit Load:** 1%- If redeemed on or before 3 months from the date of allotment. Nil- If redeemed after 3 months from the date of allotment.

**Entry Load:** Nil

**Fund Manager:** Mr. Swapnil Mayekar