

MOTILAL OSWAL
Investment Services

PHY6ITAL

The Physical & Digital of Investing

IAP

Intelligent Advisory Portfolios

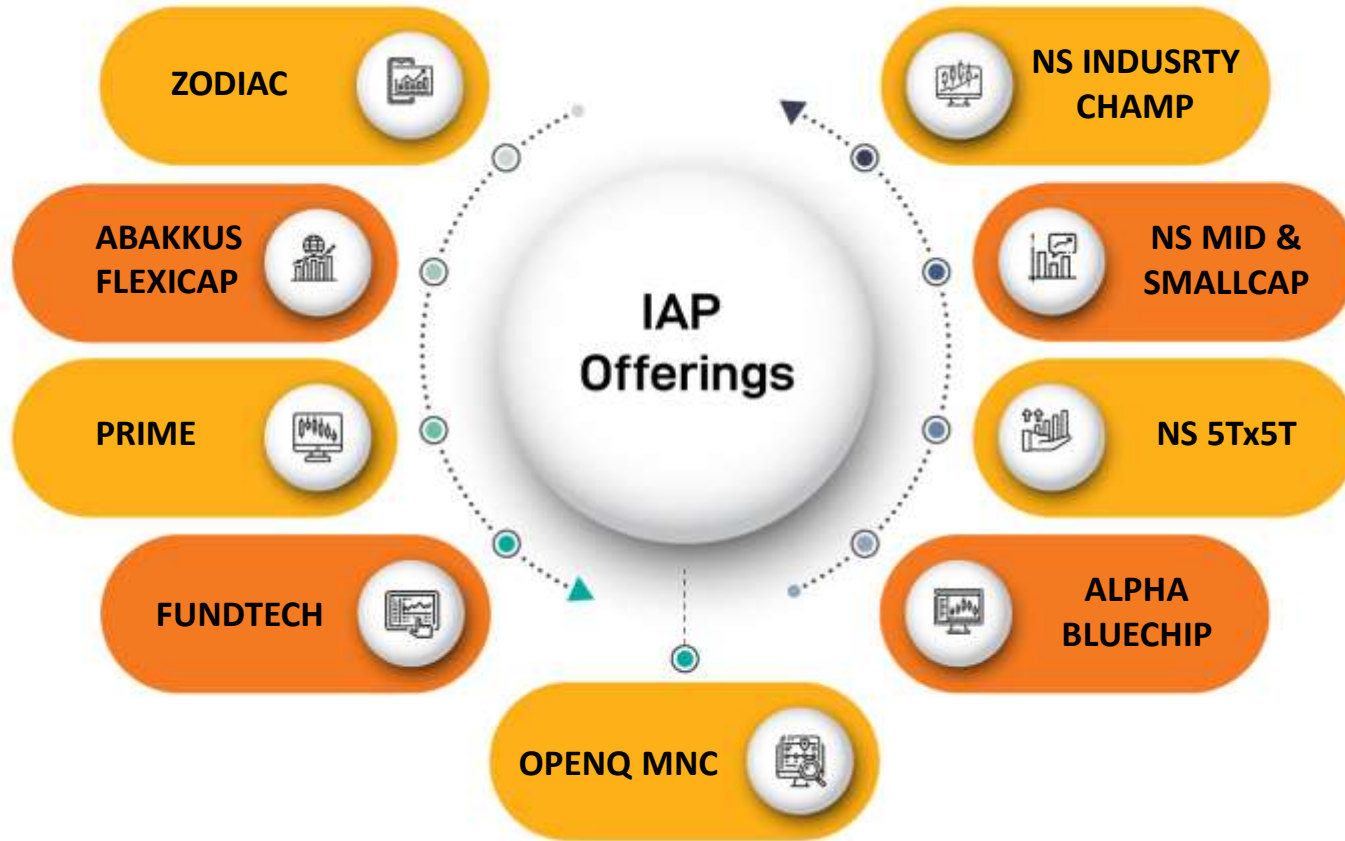


New Age of Investment Products vetted by MOFSL framework for Distribution

About IAP



- Pre-packaged equity portfolios offered by Registered Investment Advisors (RIA)
- Range of Product offering to suit all customer profile.
- 100% Automated advice by RIAs & Online Investment process.
- 24X7 portfolio monitoring basis product Rules
- Real time portfolio tracking for clients



ZODIAC

Fundamentals screening combined with Quant model

Zodiac : Combination of Strong fundamental screening aided by Quant Model



Research
Fundamental
Screening Model



Sector Preference
Sectors which can do
well or underperform



Financial Analysis
Growth In EPS, ROE &
other Parameters



Quantitative Trend
ETP, Momentum &
Volatility parameters

Core Fundamental screening combined with Quant Model for Decision making to avoid Human Bias

Zodiac : Core Strategy & Risk Management



OBJECTIVE

Investing in Nifty50
Companies



STRATEGY

Strategy to Invest in best opportunities with Dynamic method to Identify 12 stocks on daily basis. In case Nifty stock doesn't show opportunity, Money will be Invested in Nifty Bees.



RISK MANAGEMENT

SECTOR : Max 25% , Max 3
stocks, Min 5 sectors

STOCKS : 8.33% per stock , Equal
Weightage



Each Portfolio is actively monitored & rebalanced



When Potential upside in stock is achieved



If Stock is excluded from Nifty Index



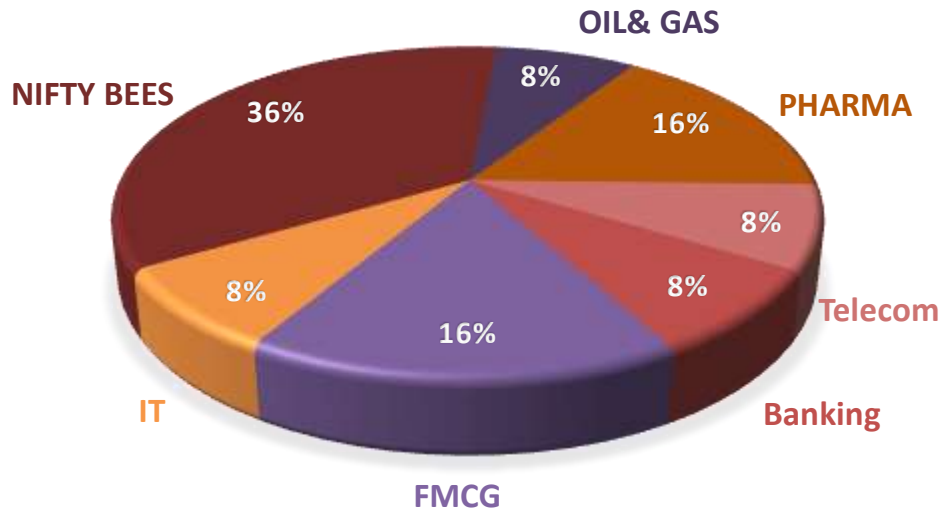
Nifty Bees will be switched when a new Stock opportunity with potential is identified



Stock Price corrects by more than RIAs tolerance levels

ZODIAC : Illustration

SECTOR DISTRIBUTION



The securities quoted are exemplary and are not recommendatory

FOR PRIVATE CIRCULATION ONLY

ABAKKUS FLEXI CAP

Fundamental Research

Abakkus Smart Flexi Cap : Core Strategy & Risk Management



OBJECTIVE

To invest in up to 25 stocks predominantly within top 250 companies by market cap



STRATEGY

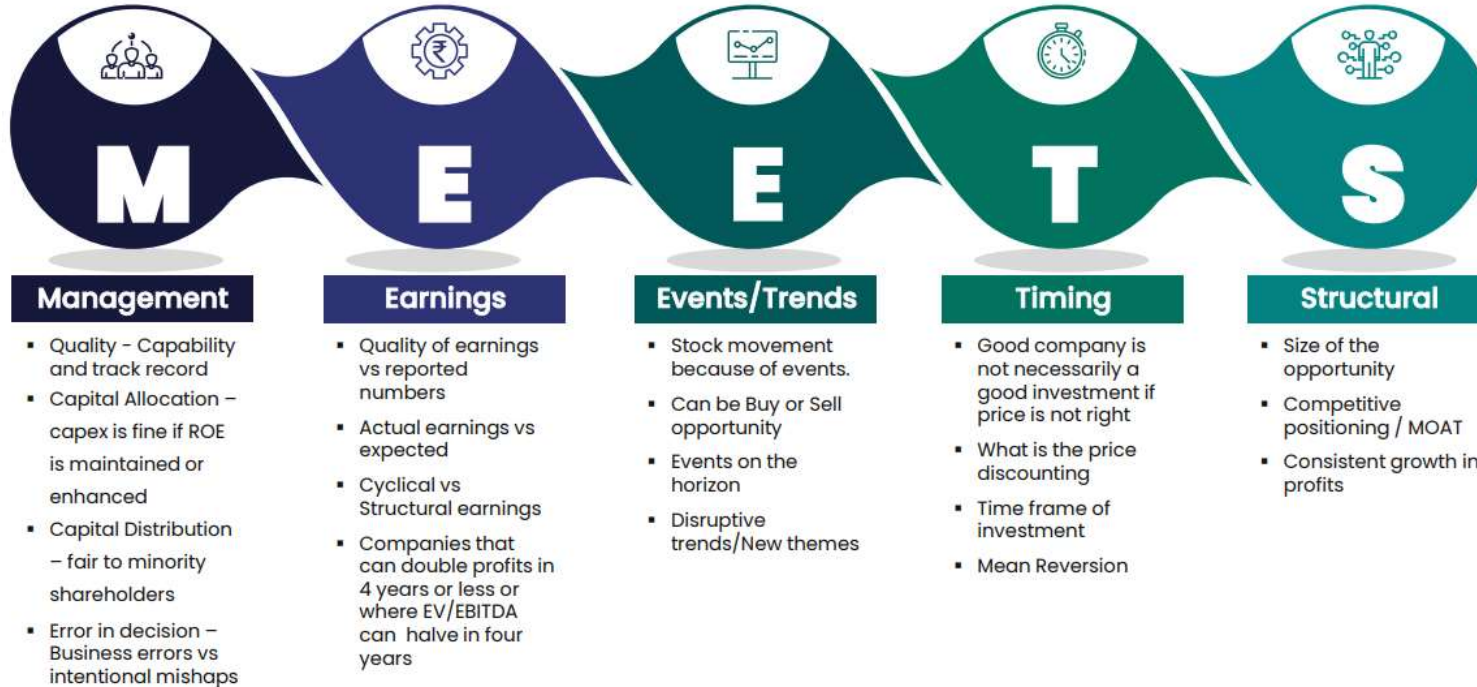
Identifying stocks through various filters based on management quality, corporate governance, sector headwinds and In-depth research and bottom up fundamental approach



RISK MANAGEMENT

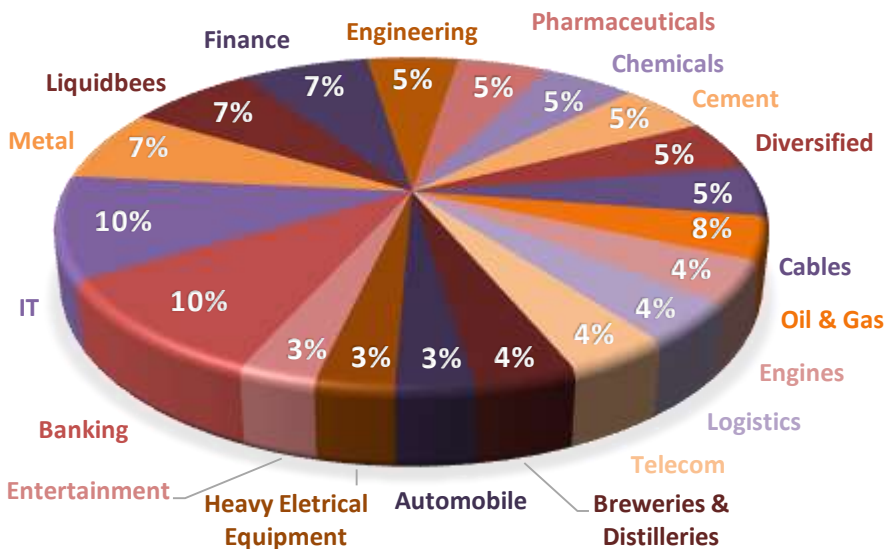
Diversified Portfolio of up to 25 companies with Risk management (Single stock exposure ideally less than 10%) and max sector exposure at 30%

Abakkus Smart Flexi Cap : MEETS FRAMEWORK



Abakkus Smart Flexi Cap :: Illustration

SECTOR DISTRIBUTION

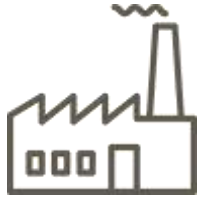


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PRIME

Fundamental Research

Investment framework



Track data across 30 different sectors/sub-sectors



Quantitative screeners across various accounting, growth, valuation & return ratio parameters



Detailed balance sheet, Income-statement, Cash flow statement & Con-call analysis



Real time news, trackers of companies, earnings and other market participants

PRIME : A unique Combination



Long Term compounders

Stocks which have a proven track record of profits over 3-5 years, meaningful growth triggers & beaten down stocks with favorable risk reward



Tactical Picks

Stocks which can become relevant based on any triggers including a change in government policy, industry consolidation and company specific opportunities

Time Horizon: 12-18 months

Time Horizon: 3-6 months

Rebalancing Criteria

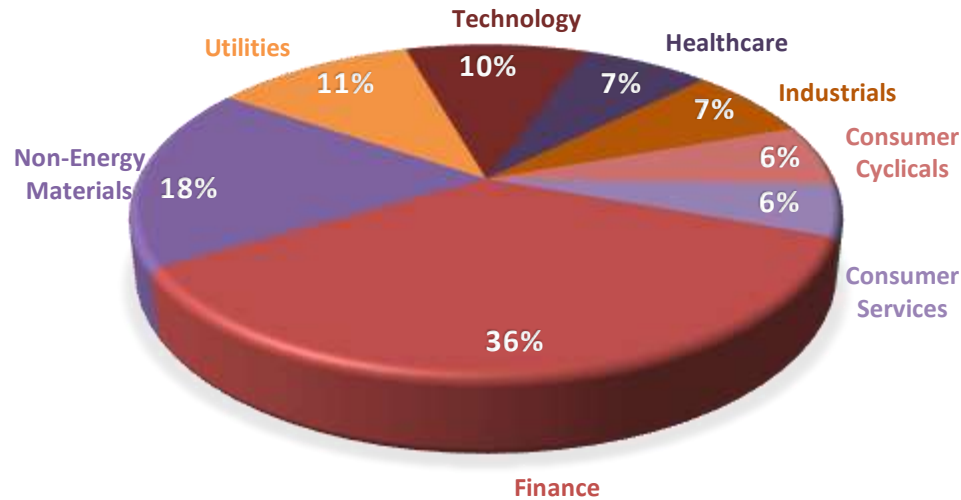


- Investment thesis is no longer valid due to
 - Entry of a large competitor into the sector
 - Change in company's capital allocation policy
 - Entry into an unrelated industry
 - Major management overhaul
- Substantially better risk/reward opportunity based on growth prospects , capital allocation policies or any alternate sector with tailwinds
- When the initial hypothesis, with which RIA had bought the stock, has run its due course
- Fall in stock price since included (with RIA Overlay).

PRIME : Illustration



SECTOR DISTRIBUTION



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FUNDTECH

ROBO ADVISORY PRODUCT



Investment Advisory Service offered by : Vivekam Financial Services Pvt Ltd.
Registration no: INA200000316



FUNDTECH : ROBO MANAGED PROCESS



ALL Listed companies

Parameters : Over 550 per company

Analysis : Fundamentals, Results, Technical, Sector, Peers, Price

Depth : Over 30 Million data points daily

Rating : Quality, Valuation, Financial Trend and Technical

FUNDTECH : COMBINATION OF FUNDAMENTAL & TECHNICAL FACTORS



Long Term Drivers

Quality

Long Term Fundamental Strength

Valuation

Attractiveness of the stock at the current price given the fundamentals

Near Term Drivers

Financial Trend

Near Term Fundamental Momentum

Technicals

Price and Volume Trend

FUNDTECH : Investment Process & Portfolio construct



- Automated process to avoid the biggest Investment Trap - Human Biases
- Disciplined & Process-driven approach which does not allow biases to creep into the investing process

FUNDTECH : Ideal Portfolio Construct Factors	
Number of Stocks	10
Sector Allocation (Max)	30%
Large Cap Allocation (Max)	100%
Mid Cap Allocation (Max)	50%
Small Cap Allocation (Max)	25%

FUNDTECH : REBALANCE CRITERIA

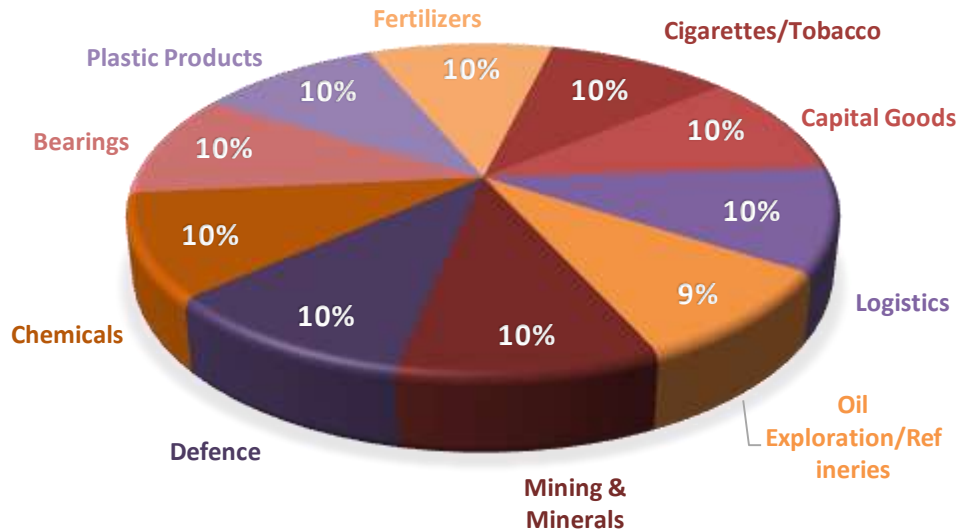


- When score of the company deteriorates
- When Quality turns Bad
- Current Quarterly Performance is Poor resulting in poor score
- Technical indicators turns Bearish resulting in poor score
- Fall from High since included (relative performance against relevant Index, i.e. Index minus stock return)

FUNDTECH : ILLUSTRATION



SECTOR DISTRIBUTION



The securities quoted are exemplary and are not recommendatory

OpenQ MNC

FACTOR APPROACH TO EQUITY INVESTING

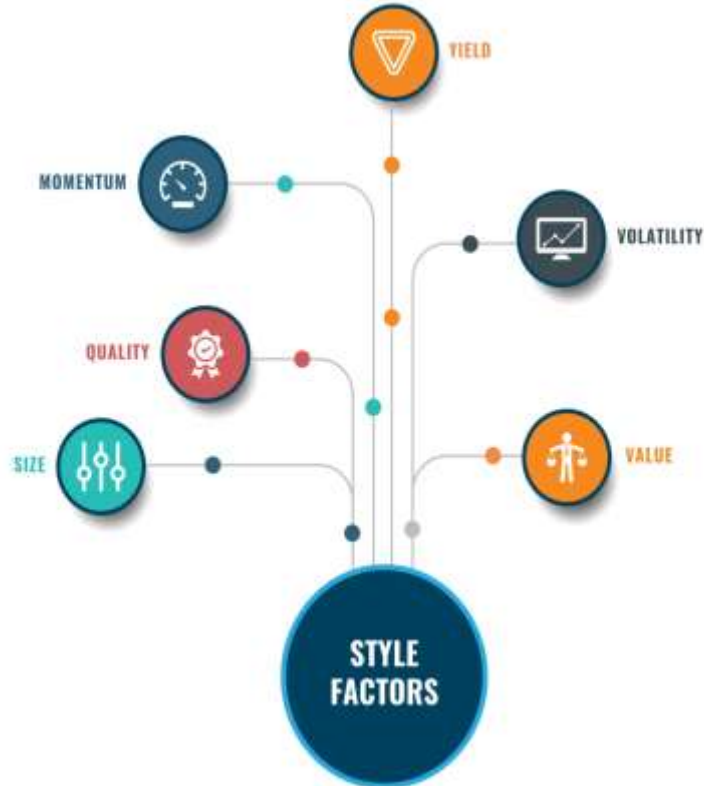
OpenQ MNC : Factor Investing

Equity investing is all about generating maximum return for a certain risk budget.

Definition of risk has undergone significant changes over last 5 decades.

CAPM mentioned that market risk is the only systematic risk.

Years of empirical research has shown that there are other risks which arise due to behavioral biases and market microstructure.



If such risks can be harnessed, then investors can earn higher returns. Such returns came to be known as Factor Premiums and sources of such returns as Factors.

Factors can be of two types:

- Alpha Factors: Used for Stock Selection. Definition and Duration of the factor is very important
- Weighting Factor: Used for Position Sizing.

OpenQ MNC : Factor Based Investing Framework



Define Universe

Cleaning up data for various Biases

Backtest in Beta Neutral Environment

Pure Data Drivers & Quant Process

Simulation & Statistical Testing of Definition & various factors duration

Strength Testing of over 20 years covering Business cycle (Boom & Bust)

Execution Analysis – Capacity , Liquidity & Stop loss



Screener



Back Tester



Optimizer



Factor Library



Off Shelf Baskets



Analyzer

MOTILAL OSWAL
Investment Services

PHY6ITAL

The Physical & Digital of Investing

OpenQ MNC : Investment Process & Portfolio construct



UNIVERSE

Pool of listed MNCs which are part of top 500 companies by market cap



PROCESS : Quantitative approach

Quantitative techniques are used to Identify stocks with Growth in earnings and price momentum .



STRATEGY

Judicious mix of Multicap portfolio with mix of large, Mid & Small markets capitalisation companies based on Quantitative techniques to arrive at the stock level risk.

Portfolio of Top stocks from Multi-National Companies (MNC) universe designed for passive long term investing

OpenQ MNC: Rebalancing Criteria

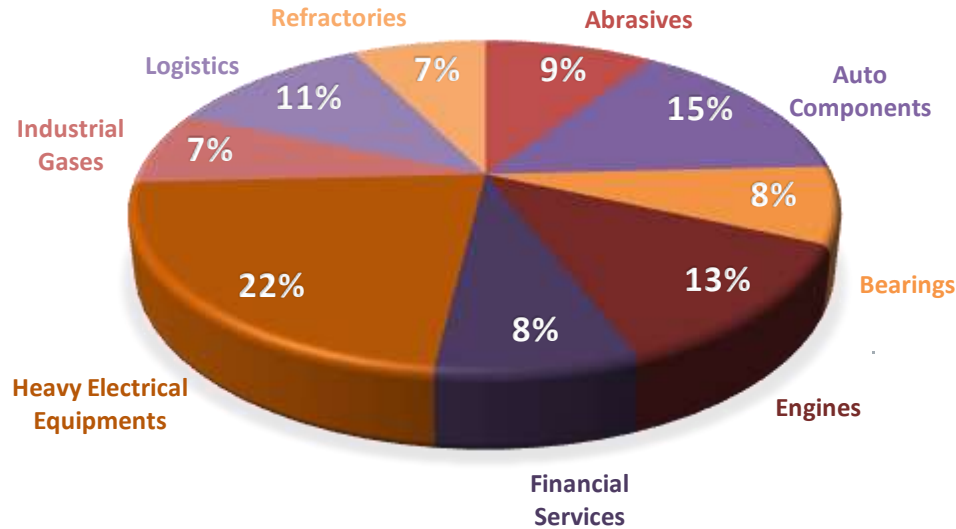


- Ideally Quarterly Rebalancing
- If the Portfolio falls more than 20% from the peak
- If individual stock falls more than 15% in intraday

OPENQ MNC: Illustration



SECTOR DISTRIBUTION



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ALPHA BLUECHIP

Fundamental Research

Identify "Business Leaders"



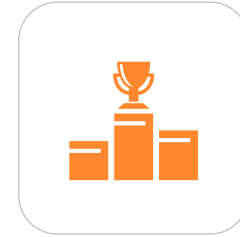
1

Companies with Duopoly Markets and Expanding Portfolio



2

Selection of companies with robust growth



3

Leader in Emerging Industry



4

Superior Economic Value



5

Management or Strategy Change

Alpha Bluechip: Investment Process & Portfolio construct



UNIVERSE

Defined investment universe to include companies with good quality businesses, strong track record and corporate governance



PROCESS

Portfolio Construction based on best ideas on bottoms up basis

Zero tolerance to minimize Price/Volatility/Liquidity & Quality risk



STRATEGY: SQGARP

- Sustainable & Quality Growth
- Sustainable Competitive Edge
- Reasonable Price
- Bottom up stock picking

Focused on investing into **Quality** business that can deliver **sustainable high growth** over medium term to long term.

Be selective in **cyclical** business

Moderate Risk Equity Portfolio



**Strong Financial
Trends**

**Strong Business
Moat**

**Formidable
Competitive Edge**

**Focused Multi Cap
Portfolio of 15-20
Stocks**

**Low Mortality
Portfolio**

ALPHA BLUECHIP: REBALANCE CRITERIA

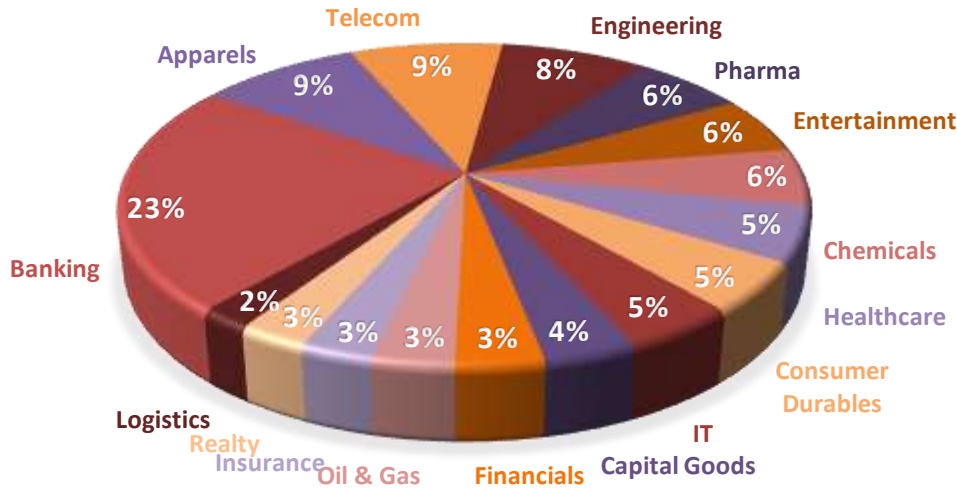


- Long term growth becomes questionable
- Overexposure in a particular company/sector
- Structural change in the business model of the company
- Change in outlook on some sector/stocks

Alpha Bluechip: Illustration



SECTOR DISTRIBUTION



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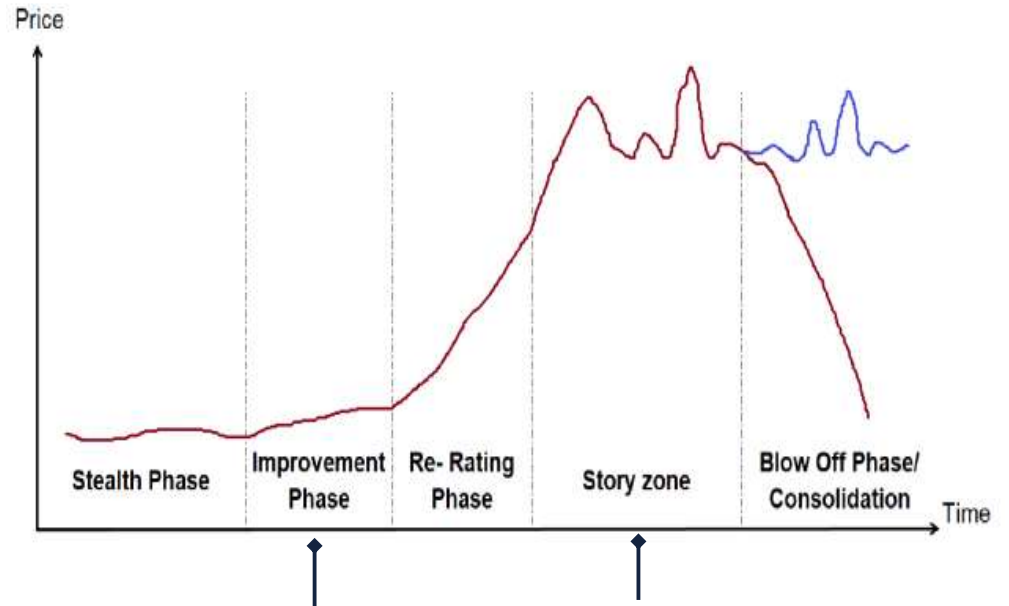
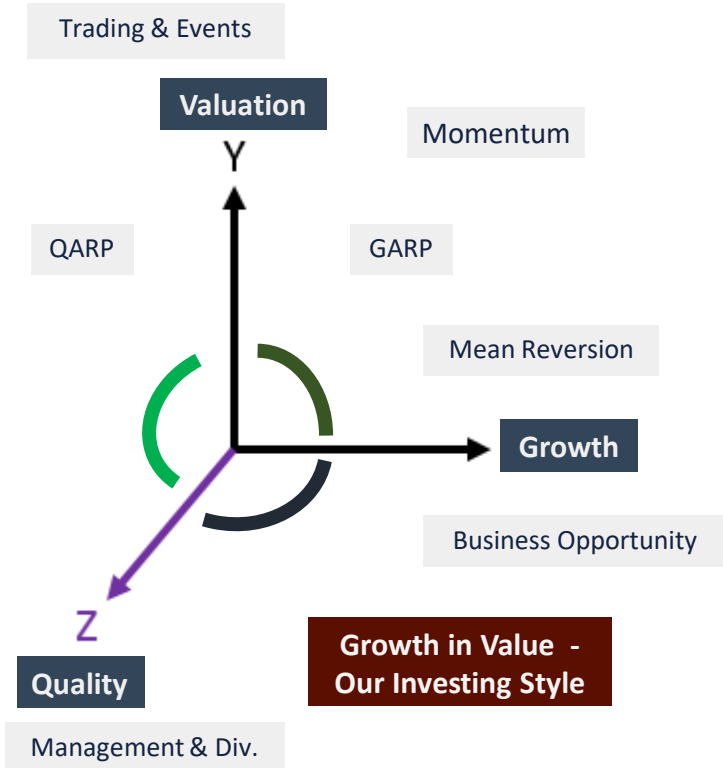
NS Industry Champ

NS Mid & Small cap

NS 5Tx5T

Bottoms up stock research with M5 Framework

Good Business : Growth in value & principle of Linearity

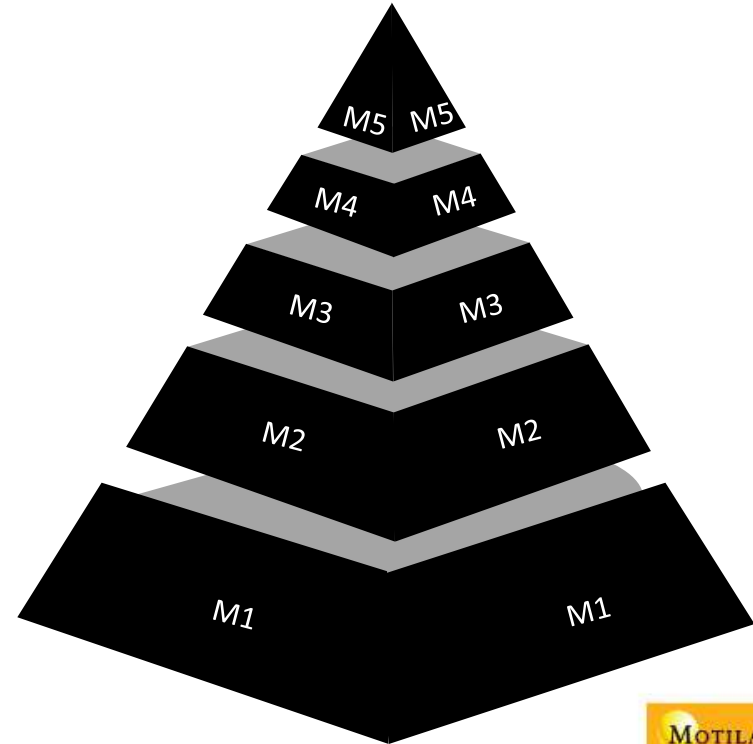


- ❖ Mid Improvement Phase to Mid Story Zone phase favors 'Growth In Value' Style of Investing.
- ❖ 2021 to 2024 should favor this style similar to 2014 -2016.

Investment Decisions : M5 Research framework that connects macro seamlessly with Micro



- M5** **Multiples**
Valuation Envelope Equation
- M4** **Modeled Headline Financial Numbers**
PL, BS, CF, Schedule
- M3** **Business & Financial Moat**
Sources of earnings quality
- M2** **Management Strategy**
Finance, HR, Product, Pricing, Supply Chain
- M1** **Market**
Addressable Market & it's changing dynamics



4 Pillars of Risk Management framework



01

STOCK LIMIT

Limits on Maximum weightage on single stock

03

STOCK REVIEW

Bear Market



Bull Market



All kinds of market move in alternate swings – Whether Bull, Bear or Sideways

If any of portfolio stocks underperforms for two consecutive swings and exhibits higher volatility, that stock gets market for SELL

All kinds of market move in alternate swings - whether Bull, Bear or Sideways

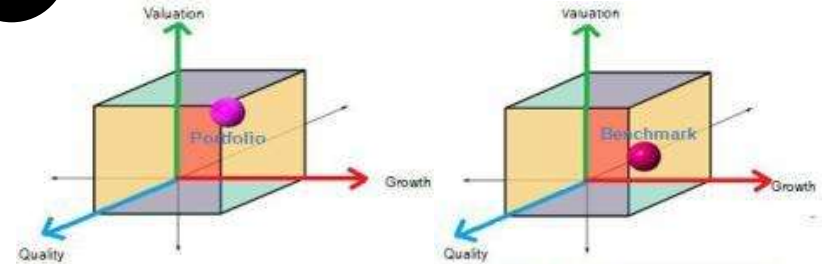
02

SECTOR LIMIT

Limits on Maximum weightage on single sector

04

FUNDAMENTAL QUADRANT – Q G V



Attribute	Quadrant 1	Quadrant 2	Quadrant 3	Quadrant 4
Quality	Low	Average	Good	Very Good
Growth	Poor	Average	Good	Very Good
Valuation	1st Quartile	2nd Quartile	3rd Quartile	4th Quartile

NS INDUSTRY CHAMP



OBJECTIVE

Investing in companies that are top-3 players of their respective industry



STRATEGY

Identify companies which are leaders of their respective industry & are showing Growth in value characteristics with expected higher return ratio



PROCESS : Fundamental Bottom - Up Research

Information mining, financial modeling, investment thesis, active & rigorous tracking for changes in earnings & quality outlook.

Companies with a track record of industry outperformance, effective leadership and efficient management usually find themselves as the industry leaders. In an uncertain economic environment these are the preferred companies to Invest as these companies are run by proven management and leadership team than can navigate difficult times.

NS INDUSTRY CHAMP : Key Features

- **Investment in the Industry Leaders**

Investment in the industry leader ensures good governance and continuous innovation in the management

- **Cap Risk:**

The model portfolio will have exposure to leaders of the segment which comprise of mostly large cap stocks

- **Benchmarking:**

The model portfolio will be benchmarked against the Nifty Large & Mid 250

- **The portfolio:**

The portfolio will consist of 12-18 stocks.

- **Growth in Value Framework**

Companies that have improving/higher return ratio are favored.

- **Bottom Up Analysis:** A rigorous bottom up research of business financials and management strategies is carried out for all portfolio companies.

NS Industry champ :Illustration

NS INDUSTRY CHAMP PORTFOLIO		
STOCK	SECTOR	WEIGHT
RELIANCE	Industrial	13%
TCS	Global	11%
ICICIBANK	Financials	10%
LT	Industrial	10%
BHARTIARTL	Industrial	9%
MCDOWELL-N	Consumers	7%
HDFCBANK	Financials	7%
SBIN	Financials	5%
CUMMINSIND	Industrial	5%
HDFCAMC	Financials	4%

Portfolio Attributes	
No of Stocks	16
% Assets in top 10 holdings	81%
% Assets in Next 5 holdings	17%

The securities quoted are exemplary and are not recommendatory

NS MID & SMALLCAP



OBJECTIVE

Investing in smaller but Budding companies of India



STRATEGY

Active investing in Small Cap investment universe by identifying companies with improving fundamentals. Tactical weight allocation under the sub-classes to achieve positive return along with managing the risk.



PROCESS : Fundamental Bottom - Up Research

Information mining, financial modeling, investment thesis, active & rigorous tracking for changes in earnings & quality outlook.

Most of the multi bagger stock today were small cap few years back. Over the last 2 years, small cap stocks have seen sharp fall owing to credit squeeze, demand slowdown and over ownership during 2017. Small cap theme portfolio is not meant as core portfolio for an investor but some tactical allocation by investors in small cap theme can be highly valuable. Small Cap Companies have potential to perform well in cycles.

NS MID & SMALLCAP : Key Features

- **Investment in high risk but high gain**
Mid & Small Cap stocks are usually high risk high gain opportunities
- **Cap Risk:**
The model portfolio carries cap risk as it is exposed primarily to the small capitalization stocks.
- **Benchmarking:**
The model portfolio will be benchmarked against the Nifty Mid & Small Cap 400 Index.
- **The portfolio:**
The portfolio will consist of 20 -30 stocks.
- **Growth in Value Framework**
Companies that have improving/higher Risk reward ratio are favored.
- **Bottom Up Analysis:** A rigorous bottom up research of business financials and management strategies is carried out for all portfolio companies.

NS MID & SMALLCAP : Illustration

NS Mid and Small Cap Portfolio		
STOCK	SECTOR	WEIGHT
ZYDUSWELL	Consumers	6%
AIAENG	Industrial	5%
TIMETECHNO	Industrial	5%
BALKRISIND	Consumers	5%
VRLLG	Industrial	5%
NH	Consumers	5%
PRAJIND	Industrial	5%
NAZARA	Global	5%
AJANTPHARM	Global	5%
KNRCON	Industrial	5%

PORTFOLIO ATTRIBUTES	
No of Stocks	24
% Assets in top 10 holdings	50%
% Assets in Next 5 holdings	20%

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NS 5Tx5T



OBJECTIVE

The portfolio provides a unique theme-based investing opportunity in the Indian market



STRATEGY

This strategy focuses on themes that should form part of India's next growth engine. The portfolio comprises stocks from 5(4-6) different themes.



PROCESS : Fundamental Bottom - Up Research

Information mining, financial modeling, investment thesis, active & rigorous tracking for changes in earnings & quality outlook.

As India approaches to become \$5trillion economy by GDP, the total Market Cap of Indian companies will also set to increase by 11-12% CAGR. Some of the market cap gains will come from new listings but a large part of the gains will come from select themes

NS 5Tx5T: Key Features

- **Investment in Themes:**
Based on Macro View and Risk Rewards availability among various themes
- **Cap Risk:**
The universe consists of stocks from all three cap: large, mid and small
- **Benchmarking:**
The model portfolio will be benchmarked against the Nifty 500
- **The portfolio:**
The portfolio will consist of 15 -20 stocks.
- **Growth in Value Framework**
Companies that have improving/higher Risk reward ratio are favored.
- **Bottom Up Analysis:** A rigorous bottom up research of business financials and management strategies is carried out for all portfolio companies.

NS 5Tx5T : Illustration

NS 5Tx5T Portfolio		
STOCK	Themes	WEIGHT
ICICIBANK	Financials	11%
SBIN	Financials	11%
TCS	Global	10%
DMART	Consumers	8%
SBILIFE	Financials	8%
BRITANNIA	Consumers	7%
PRAJIND	Industrial	6%
CUMMINSIND	Industrial	6%
NH	Consumers	6%
CONCOR	Industrial	5%

PORTFOLIO ATTRIBUTES	
No of Stocks	16
% Assets in top 10 holdings	77%
% Assets in Next 5 holdings	21%

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IAP : Product Performance



	FUNDTECH	BSE 500	PRIME	NIFTY 200	ZODIAC	NIFTY 50	OPENQ MNC	NIFTY MNC	NS INDUSTRY CHAMP	NIFTY LARGE MIDCAP 250	NS MID & SMALLCAP	NIFTY MID SMALL CAP 400	NS 5Tx5T	NIFTY 500	ALPHA BLUECHIP	NIFTY 200	
Jun-22	-10	-5.2	-8.9	-5.2	-2.07	-4.85	-3.82	-3.49	-4.2	-5.2	-3.18	-5.82	-5.91	-5.18	-5.1	-5.2	
3 M	-18	-10	-18.9	-9.95	-7.20	-9.65	-6.14	-1.73	-10.05	-9.78	-9.7	-11.22	-13.18	-10.12	-8.8	-10	
6 M	-25.4	-10.4	-23.5	-10.1	-2.95	-9.07	-7.07	-6.33	-14.09	-11.29	-15.4	-14.53	-19.5	-10.73	-3.9	-10.1	
1 Yr.	-4.4	-0.6	-4.8	-0.4	-	-	12.08	2.10	1.49	-0.71	-0.89	-2.29	-3.67	-0.64	14	-0.4	
LTD	28.17	22.18	5.41	4.15	5.91	0.18	20.54	10.34	33.67	38.63	46.17	46.51	20.1	22.24	19.3	5.2	
Launch Date	Oct-20		Feb-21		Jul-21		Feb-21		Apr-20			Apr-20		Apr-21		21-Apr	

Model Portfolio Performance as on 30th JUN 2022, computed from launch date. Clients Actual Portfolio Stocks / Returns May Vary depending on their entry date.

+All LTD returns are CAGR, except for Zodiac



Subscription Model, Fees & charges



Upfront Subscription

- Fees : 2% p.a (Chargeable Half yearly on AUA at 1%)
- Fees Abakkus : 2.5% p.a (Chargeable Half yearly at 1.25% for 6 months on daily average AUA)
- Brokerage : 0.50%
- Breakage Fees : NIL
- Withdrawal : Full & Partial

Fixed Fees Model

- Fees : Subject to max cap of Rs.1.25 lakh (20% Fees above 10% Hurdle rate Charged quarterly).Higher water marked
- Brokerage : 1.00 %
- Breakage Fees : 0.5% (If Exit Within 6 months)
- Withdrawal : Full & Partial

Investment Mode offered by RIAs



LUMP SUM

- Option : One Time Investment
- Min Amount : 1 lakh – 5 lakhs (Product chosen)
- Top Up : Min Rs. 25000 & in multiples of Rs. 1000
- Subscription mode : Upfront Subscription or Fixed Fee Model

SIP

- Option : Systematic investment on Dates (1,8,18,22)
- Min Amount : Rs. 10000 – Rs.25000 (Not Available for few products)
- Top Up : Investment will be done in LUMP SUM MODE
- Subscription mode : Only Fixed Fee Model (Fees above hurdle rate)

Products (Summary)



PRODUCT	ABAKKUS SMART FLEXICAP	FUNDTECH	OPENQ MNC	NS 5Tx5T	NS MID & SMALL CAP	NS INDUSTRY CHAMP	PRIME	ZODIAC	ALPHA BLUECHIP
MIN INVESTMENT	5,000,00	2,50,000	2,50,000	5,00,000		5,00,000	1,00,000	2,50,000	2,50,000
TOP UP (Rs)	80,000	25,000	50,000	1,00,000		50,000	50,000	1,00,000	1,00,000
SIP OPTION	NO	10,000	10,000	25,000	25,000	25,000	NO	NO	NO
RISK CATEGORY	Aggressive					Conservative	Moderate		
BENCHMARK	NIFTY 200	BSE 500	NIFTY MNC	NIFTY 500	NIFTY SMALLCAP 400	NIFTY LARGE MID 250	NIFTY 200	NIFTY 50	NIFTY 200
INVESTMENT UNIVERSE	MULTICAP	MULTICAP	MULTICAP	MULTICAP	MID & SMALL CAP	MULTICAP	MULTICAP	LARGECAP	MULTICAP
STOCK SELECTION METHODOLOGY	FUNDAMENTAL	QUANTITATIVE		FUNDAMENTAL			FUNDAMENTAL & QUANTITATIVE	FUNDAMENTAL	
RIA	ABAKKUS ASSET MANAGER LLP	VIVEKAM FINANCIAL SERVICES PVT LTD.	QUANTECH CAPITAL	NARNOLIA INVESTMENT ADVISORS PVT LTD.			VIVEKAM FINANCIAL SERVICES PVT LTD.	RENAISSANCE INVESTMENT MANAGERS PVT. LTD.	
FIXED FEES MODEL	NO	20% FEE CHARGES POST 10% HURDLE RATE(CHARGEABLE QUATERLY), HIGH WATER MARKED						NO	
		MAX FEES CAPPED AT Rs.125000							
SUBSCRIPTION MODE	2.5% p.a (Half yearly at 1.25% for 6 months on daily average AUA)	2% P.A. (CHARGEABLE HALF YEARLY at 1% ON AUA)							



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Thank You



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.motilaloswal.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@motilaloswal.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 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@motilaloswal.com. In case of grievances for Securities Broking write to grievances@motilaloswal.com, for DP to dp grievances@motilaloswal.com.
Investment in securities market are subject to market risks, read all the related documents carefully before investing

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