

MOTILAL OSWAL

MUTUAL FUND

# MANUFACTURE GROWTH

Introducing

## MOTILAL OSWAL MANUFACTURING FUND

A Fund Investing in India's Manufacturing Sector

NFO OPEN ON

19<sup>th</sup> Jul - 02<sup>nd</sup> Aug 2024



### WHY MANUFACTURING IN INDIA?



China + 1 strategy for global players



Wage Cost and Labour Productivity



Merchandise growth to be greater than services



Share of manufacturing to rise above 20%



A diversified thematic strategy

Sector Allocation (%)	Nifty 500	Nifty India Manufacturing Index
Auto and Components	7.3	30.6
Capital Goods	5.4	21.2
Healthcare	5.6	14.0
Metals & Mining	3.7	12.5
Oil & Gas	9.2	8.6
Chemicals	2.2	7.2
Consumer Durables	3.1	4.4

Source: NSE Indices, AceMF, MOIE. Data as of 31<sup>st</sup> May, 2024

### WHY NOW?

**ASHA JHANWAR**

Amfi Registered Mutual Fund Distributor

ARN - 183087

Address:-21A, Lane No-1, Ravindrapuri Varanasi-221005.

Reduction in multiple bottlenecks

Time for Capex : High Capacity Utilisation levels

Macro Goldilocks : Lower Inflation, Lower Interest Rates, CAD Surplus, Strong Forex reserves

Strong Momentum of Reforms