

Clean Environment Growing Potential

Introducing

Motilal Oswal BSE Clean Environment Index Fund

Invest in companies powering India's transition
towards a cleaner future.



NFO PERIOD

5th – 19th June

India's Threefold Challenge: Energy Dependence, Emissions and Pollution

India's Biggest Spending Problem Has One Root Cause

Coal and Oil together account for over 20% of India's total import bill.

OIL IMPORT BILL – FY26

\$123 Bn

₹10.88 Lakh Crore

India's net crude import bill rose from \$116.4 Bn in FY25 to \$123.1 Bn in FY26 – up despite no major rise in volumes.



88% Oil Imported



\$120 Bn+ Outflow



Rupee Pressure



CAD Widens



Fiscal Stress

COAL IMPORT BILL – FY26[^]

\$28 Bn

₹2.4 Lakh Crore

India is the world's 2nd largest coal importer. Coal + oil together account for over ~20% of India's total import bill.



CURRENT ACCOUNT DEFICIT (CAD) – FY26^{^^}

\$30 Bn

1.0% of GDP

Fossil fuels are the single largest driver of India's merchandise trade deficit



[^]Provisional Data

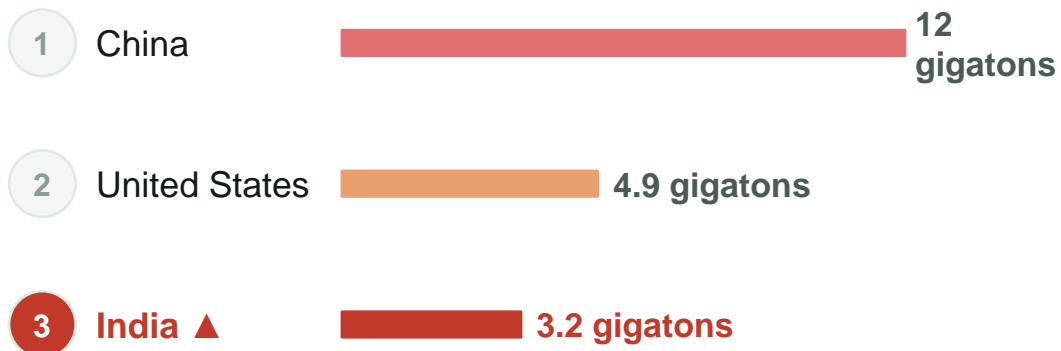
^{^^} For the Period Apr 2025 to Dec 2025

Source: IEEFA (March 2026) | PPAC, Ministry of Petroleum & Natural Gas | RBI Balance of Payments FY2024-25 | Ministry of Coal

The World's 3rd Largest Emitter – Ranked 176th on Environment

India's fossil fuel dependency has made it one of the world's most significant polluters – with consequences visible in every city, river, and lung in the country.

TOP CO₂ EMITTERS GLOBALLY (ANNUAL)



WORLD AIR QUALITY REPORT 2024

13 of 20

of world's most polluted cities are in India

Byrnihat, India

#1 Most Polluted City — World

Delhi

#1 Most Polluted Capital — 6 Consecutive Yrs

India vs WHO PM2.5 Limit

10× Above Safe Level

176 / 180

YALE ENVIRONMENTAL PERFORMANCE INDEX 2024

**The Planet is Changing.
So is the Investment Opportunity.**

Not a Trend. A Global Commitment.

The World Has Decided.

Global leaders, governments and institutions have set clear, binding targets to transform the world's energy and economy. These are not aspirations — they are commitments backed by policy and capital.



Net Zero by 2050

Global Emissions Target

195 countries committed under the Paris Agreement to reduce emissions – with net zero by 2050 as the global benchmark



50%

of Global New Cars Electric by 2030

Electric Vehicles Target

At least 50% of new car sales to be electric globally by 2030 per IEA Net Zero Scenario



3x

Renewables by 2030

Global Clean Energy Target

Triple global renewable energy capacity to 11,000 GW by 2030 – agreed at COP28 by 130+ countries



\$4.5 Tn

per year by 2030

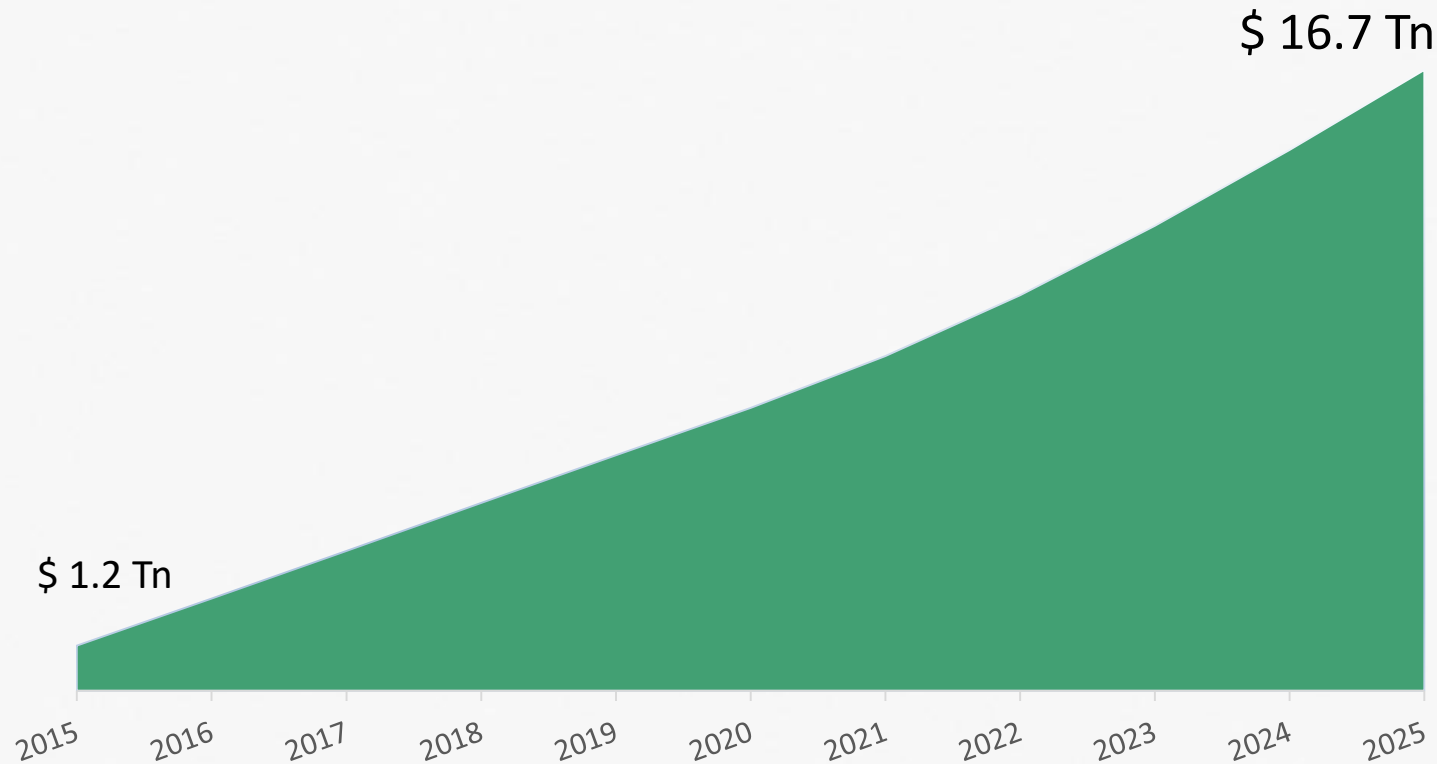
Clean Energy Investment Needed

Annual clean energy investment must reach \$4.5 trillion by 2030 to limit warming to 1.5°C

A Decade of ~\$ 17 Trillion Investments towards Clean Energy

For every **\$1** going into **Fossil Fuels** today, nearly **\$2** goes into **Clean Energy**

Global Clean Energy - Cumulative Investment



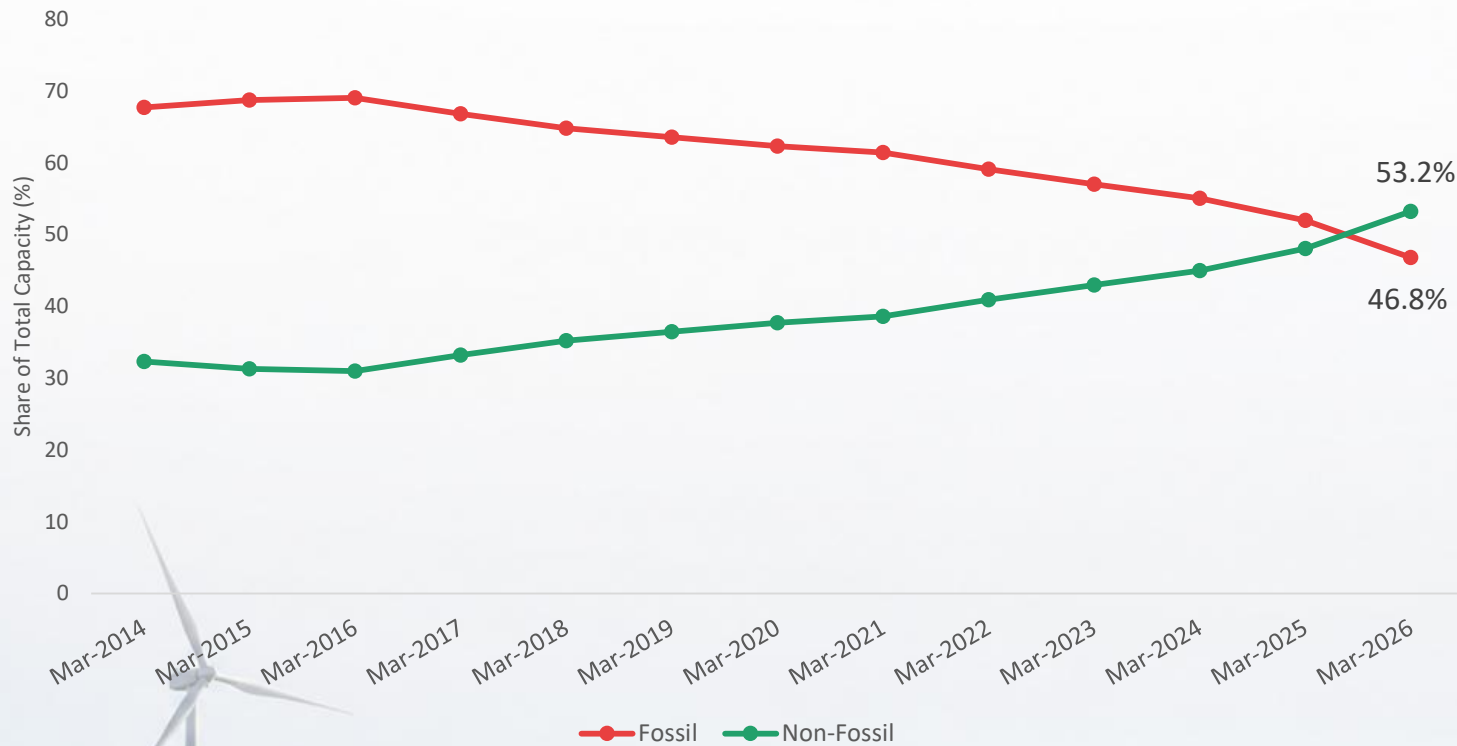
Clean energy investments reached a record **\$ 2.2 trillion** in **2025** alone, taking cumulative investments to **~\$17 trillion** since **2015**, supported by record renewable additions, strong EV sales and rapid battery deployment.

Clean Energy – India's Defining Decade

Non-Fossil Crosses 50% of Installed Capacity

Non-fossil capacity has crossed **50%** of installed capacity, yet actual **generation share** remains at **29.2%** - reflecting the **structural gap** between capacity and actual output

India's Power Capacity Mix: Fossil vs. Non-Fossil (%)



India achieved its **target** of **50%** non-fossil capacity – **5 years** ahead of schedule.

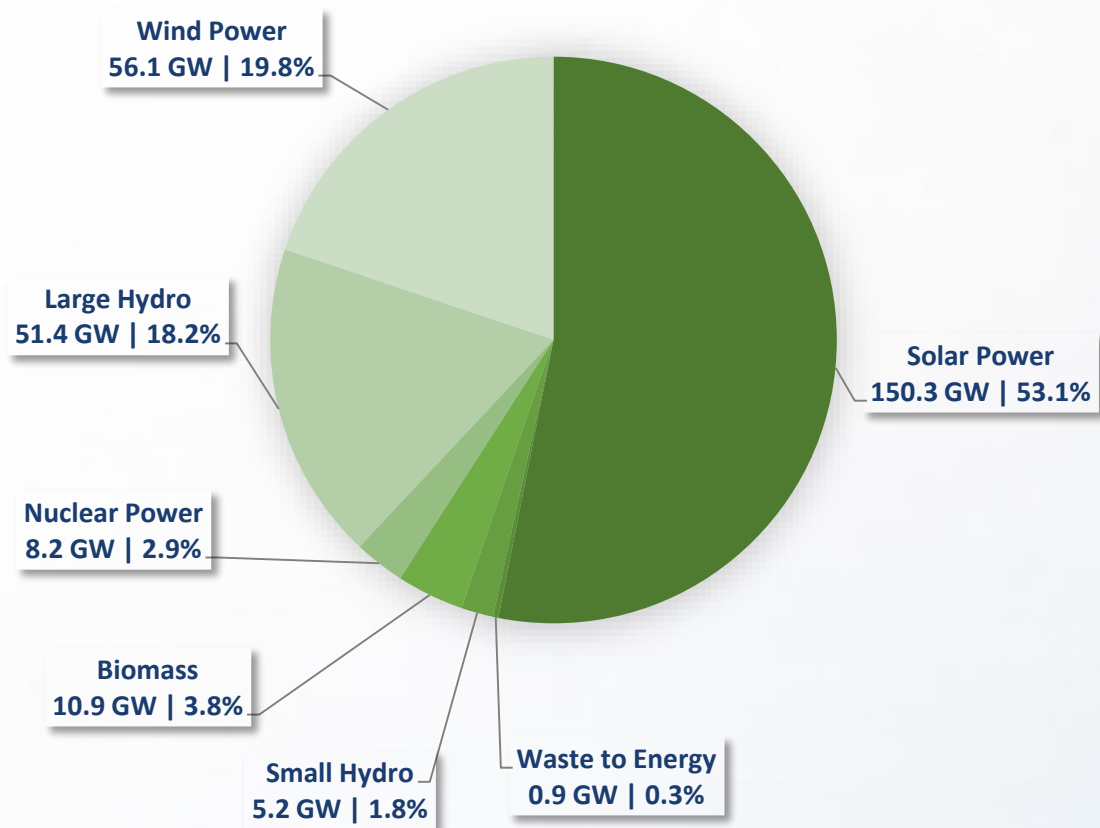
The gap will only widen. India has **176.7 GW** of clean energy projects already under implementation.

GW - Giga Watt

Source: Ministry of New and Renewable Energy (MNRE), Government of India. Data as of March 30, 2026.

India's Non-Fossil Capacity – Deep, Diverse and Growing

Non-Fossil Installed Capacity in India (%)



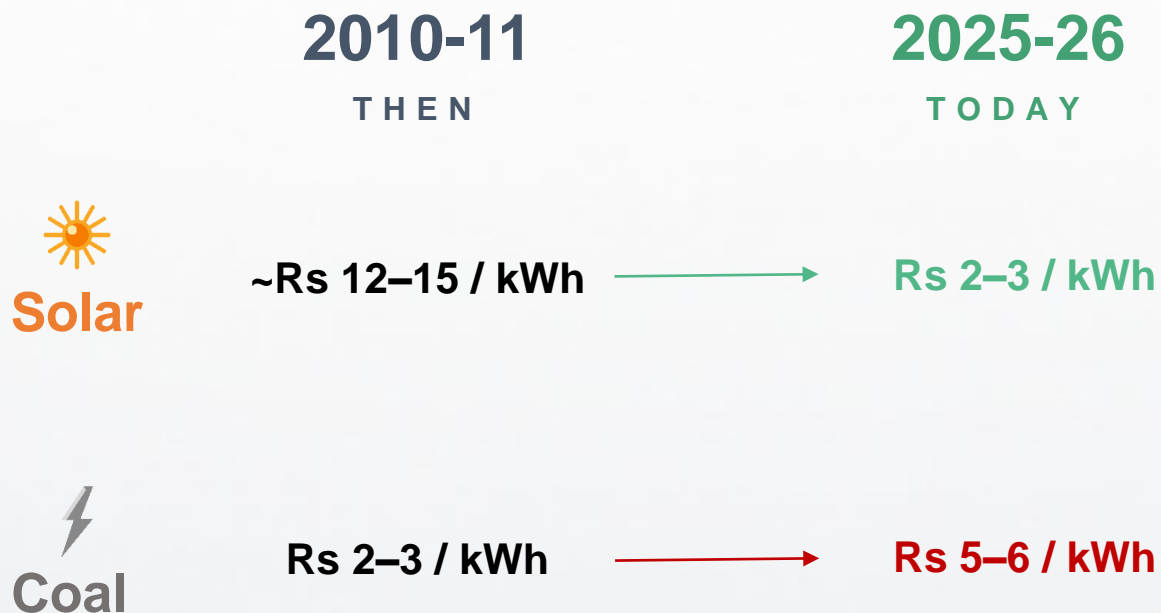
From solar and wind to hydro, biomass, nuclear and waste-to-energy, India's clean portfolio is spread across technology types — **reducing single-source risk.**

India can now manufacture solar modules domestically to meet its **own demand** and **export** as well — making this growth structurally **self-sustaining.**



Solar tariffs have fallen ~83% since 2010-11

With solar now cheaper than coal, the transition is economically certain – not just environmentally desirable



40–50%

Solar's Cost Advantage Today

Even solar with battery storage is cheaper than new coal plants discovered in 2025 auctions.

₹0

Marginal Cost of Solar

Once installed, solar generates power at near-zero marginal cost. Coal plants carry fuel costs every hour they run. The economic gap is widening.



Govt Policy Push – Comprehensive. Targeted. Binding.

Manufacturing · Wind · Storage · Hydrogen · Transmission · Demand – Every pillar of clean energy is covered by active government policy.



Rs 24,000 Cr

**PLI – Solar Modules
Outlay**

Private investment of Rs
52,900 crore attracted in
return



Rs 7,453 Cr

**Offshore Wind
Funding**

195 GW coastline potential
– first 1 GW being tendered



43 GWh

**Batter Storage
Funding**

Grid-scale battery storage –
Phase 1+2 approved



Rs 19,744 Cr

**Green Hydrogen
Mission**

Target 5 MMT/year green
hydrogen by 2030 –
positioning India as global
green H₂ hub



6,000 km

Green Energy Corridor

Dedicated Renewable
transmission lines – evacuating
clean power to cities



24% by 2030

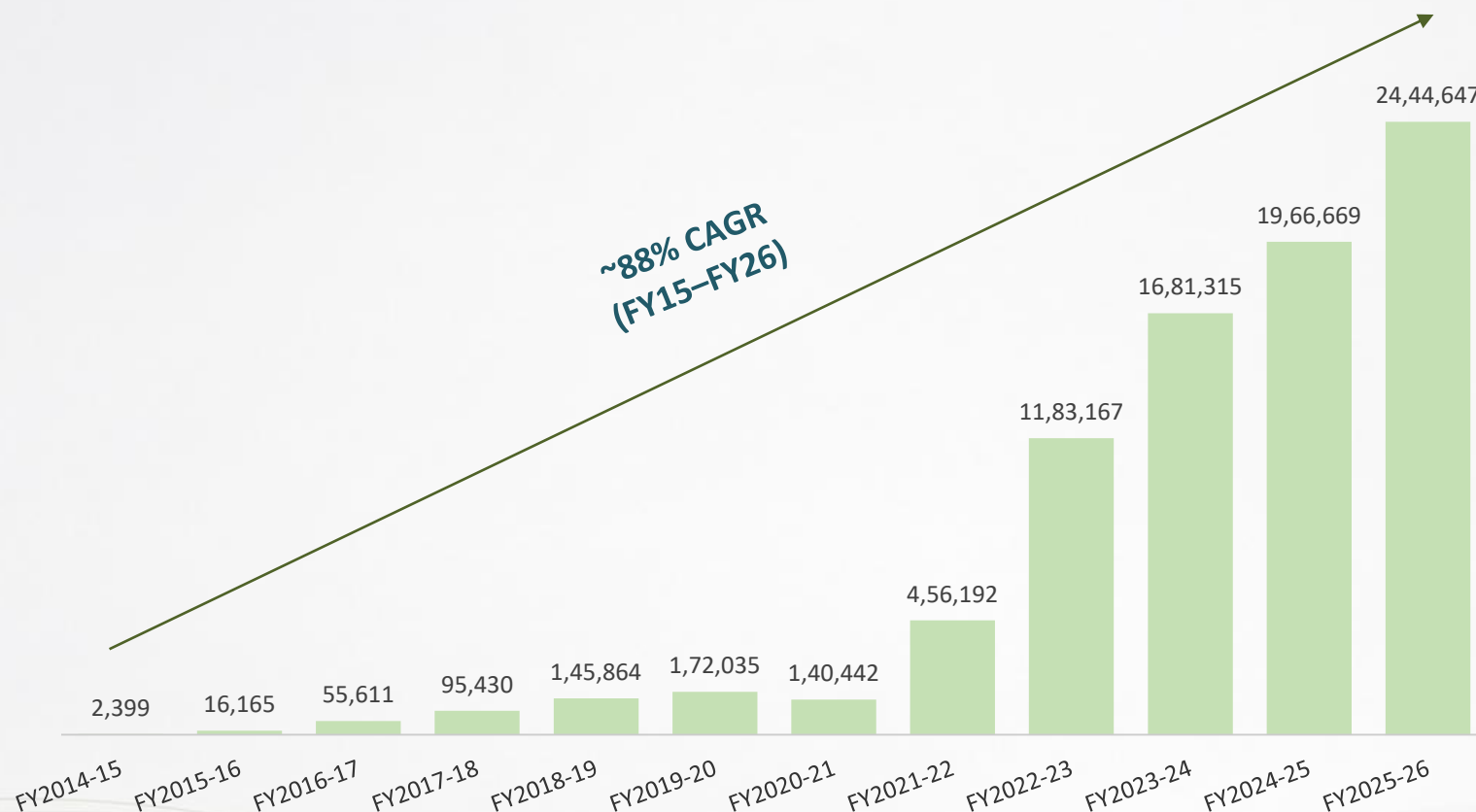
Renewables Mandate

All DISCOMs must source
24% power from Renewable
sources – guaranteed
demand

Clean Usage – India's Mobility Shift

India's EV Transition – A 1000x growth in a Decade

India EV Registrations



India's EV registrations have surged **1020x** in a decade – **from 2.4k** in **FY15** to over **24L** in **FY26** – driven by falling battery costs and policy push.

The **EV30@2030** mandate targets **80%** of 2W/3W, **30%** of cars and **70%** of CVs to be electric – implying **8-10x** growth from today's levels.



India's EV Penetration – Still Early, But Accelerating Fast

Country	EV Penetration (%)
Norway	88%
Denmark	56%
China	48%
UK	30%
Europe (ex-UK)	20%
Thailand	13%
USA	10%
Indonesia	7%
Brazil	6.5%
India	4.5%

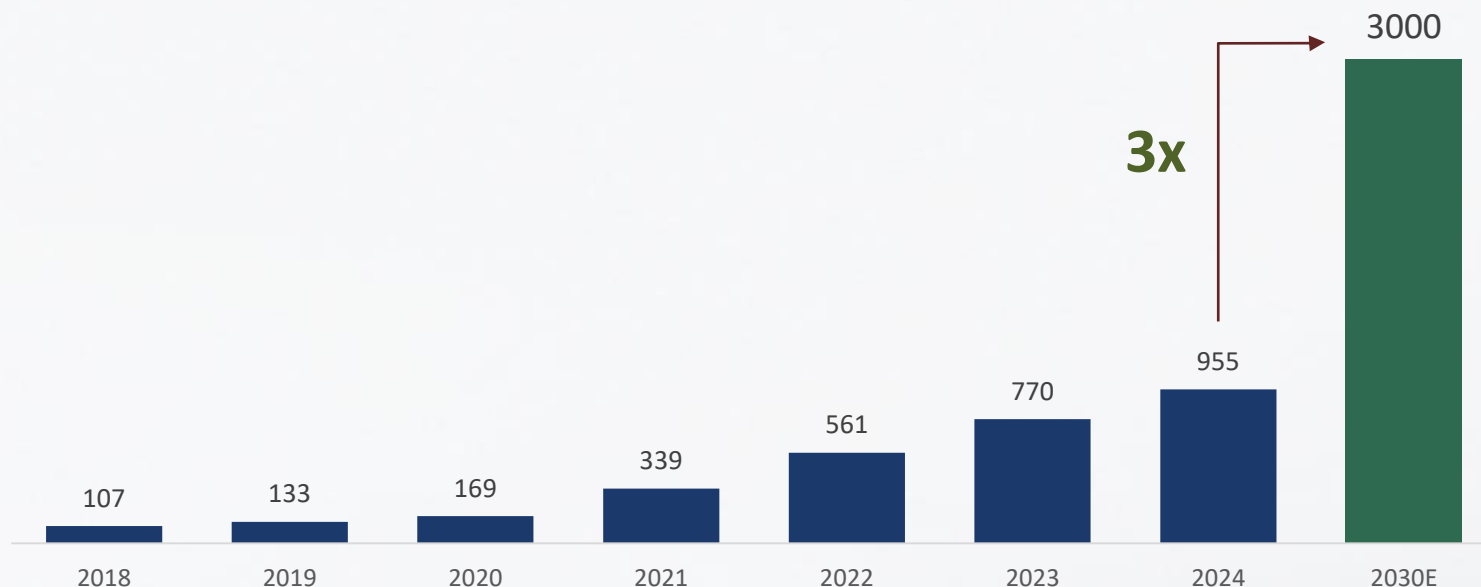
At **4.5%** passenger car penetration, India trails most major EV markets – but has moved from **2% in CY2024** to **4.5% in FY26**, doubling in a single year.

Markets like China and Norway were at **sub-5% penetration** less than a decade ago. India today sits at exactly that **inflection point** – where policy, cost curves, and consumer readiness converge.



EV Battery Demand – The Next Mega Opportunity

Global EV Battery Demand (GWh)



Global EV battery demand crossed **1 TWh** in **2024** – what took an entire year a decade ago now takes a single week.

Electric cars drive **85%+** of demand today, but electric trucks are the fastest-growing segment — battery demand from trucks is set to triple by **2030**.

India's commissioned battery cell capacity stands at just **1.4 GWh** against a PLI ACC scheme target of **50 GWh** – domestic manufacturing is still in its earliest innings.



Clean Economy – India's Circular Revolution

India's Waste & Water Reality

Solid Waste

62 Million Tonnes (MT) Generated Annually



43 MT Collected



Only 12 MT Treated (20%)

Wastewater

72,000 Million Litres Per Day (MLD) Generated



Only 20,000 MLD Treated (28%)


India's waste is growing at **4% CAGR** – by 2030, it will hit **165 MT annually**. The treatment gap is not shrinking. It is widening.

India has **1,000+ rivers** – yet **296 river stretches** across **32 states** are critically polluted, almost entirely due to untreated sewage discharge.

The Infrastructure Response – A Growing Market Backed by Policy

The government has responded with multi-billion dollar mandates – and the private market is only beginning to catch up

Water Treatment Market

 **\$9.6B** → **\$18.6B**
(2024) by 2033

The sewage treatment segment alone is locked into a 10-12% CAGR

Government Mission Allocation

 **\$103 Billion Budget**

Jal Jeevan Mission

Aiming for 100% household water connection

Solid Waste Market

 **\$7.8B** → **\$10.4B**
(2025) by 2030

Growing at a steady 5.72% CAGR

The Reuse of Wastewater

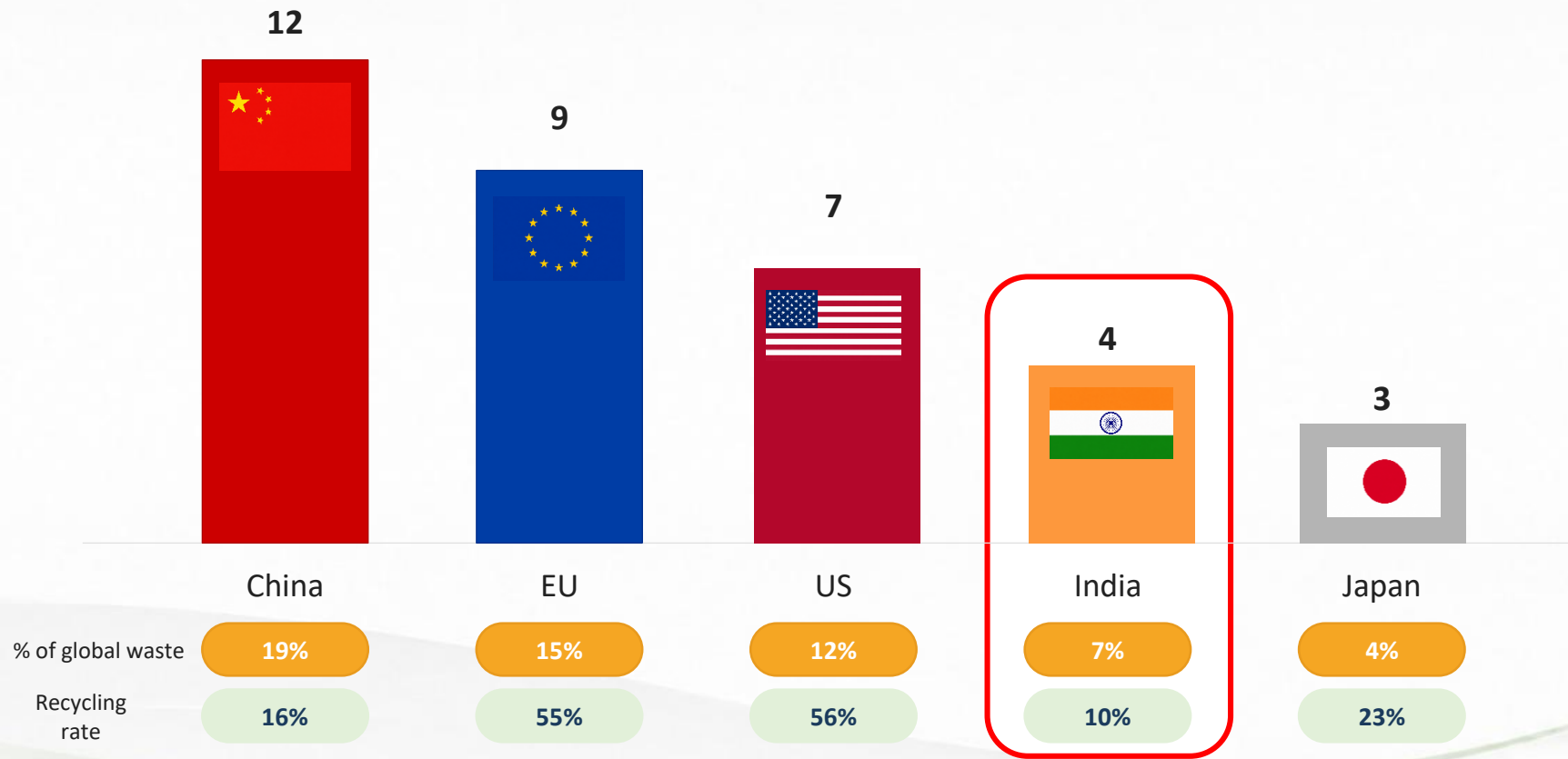
 **₹966 Billion**

Agricultural reuse potential alone

India treated wastewater available for reuse projected to triple by 2050

India's E-Waste Crisis: The Gap Between Generation and Recycling

Top 5 E-Waste Generators, Million Metric Tonnes



India's transition to clean energy is driving unprecedented growth in end-of-life batteries and electronics.

But the country's formal recycling ecosystem remains woefully inadequate to match the scale of this challenge.



**The Entire Clean Economy.
One Focused Index.**

5 Pillars of the BSE Clean Environment Index



Renewables

85.9%

OF INDEX

Solar, wind, hydro and storage – power generators, equipment makers and transmission players. India's 500 GW target by 2030 drives secular demand.

16 companies



Electric Vehicles

9.0%

OF INDEX

Pure-play EV OEMs across 2W, 3W and cars. India's registrations surged 150x in a decade — and the EV30@2030 mandate demands 8–10x more.

3 companies



Water

3.1%

OF INDEX

Water supply, treatment and infrastructure companies. 72% of India's sewage flows untreated – and a \$23.85B market is being built to fix it.

3 companies



Recycling

1.8%

OF INDEX

Metal and PET recyclers backed by binding EPR mandates. Regulatory demand – not discretionary spend – is what drives this theme.

2 companies



Waste

0.2%

OF INDEX

Municipal and industrial waste treatment. India treats only 12 MT of 62 MT generated – a \$65B infrastructure gap under SBM 2.0.

1 company

BSE Clean Environment Index Methodology

Base Universe

Starting Universe

BSE 1000

Large Cap + Mid Cap + Small Cap

India's largest 1,000 listed companies by market capitalization – ensuring broad, liquid coverage.

Liquidity Filter

Tradability Screen

Top 80%

By Annualised Daily Traded Value

Must rank in the top 80% by ADTV within the BSE 1000 – ensuring all constituents are actively tradeable.

Revenue Test

Clean Revenue Threshold

> 25%

of total revenue from Clean Environment activities[^]

Revenue verified from BRSR reports, segment disclosures or annual report business descriptions.

Eligible Industries Only: Only companies belonging to BSE-defined eligible basic industries are considered for inclusion — ensuring the index captures genuine clean economy businesses, not incidental exposure.

Constituent Weighting

Weighting Method

Float-Adjusted Market Cap

Individual Stock Cap

Maximum 15% per stock

Reconstitution Frequency

Semi-Annually in June & December

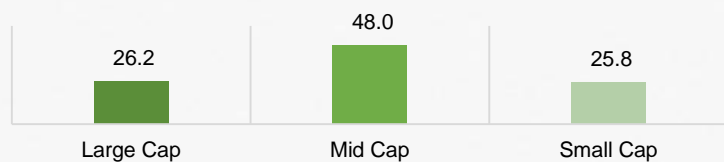
[^] Companies deriving at least 25% of their revenue from clean environment activities such as clean energy, water management, waste management and recycling.

Composition

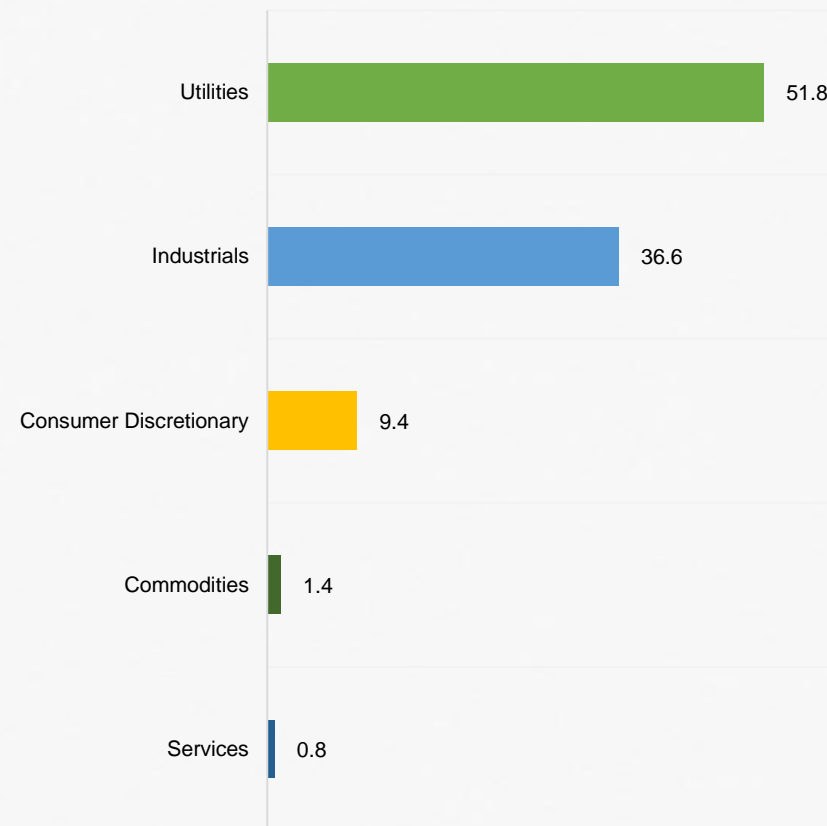
Top 10 Constituents

Constituent Name	Weight
Suzlon Energy Ltd.	15.8%
Adani Green Energy Limited	13.7%
Tata Power Co.Ltd.	12.6%
Jsw Energy Ltd	9.1%
Waaree Energies Limited	8.4%
Nhpc Ltd.	6.9%
Ather Energy Limited	5.2%
Mtar Technologies Limited	4.7%
Premier Energies Limited	3.5%
Ntpc Green Energy Limited	2.7%
Total	82.6%

Size Coverage % (SEBI)

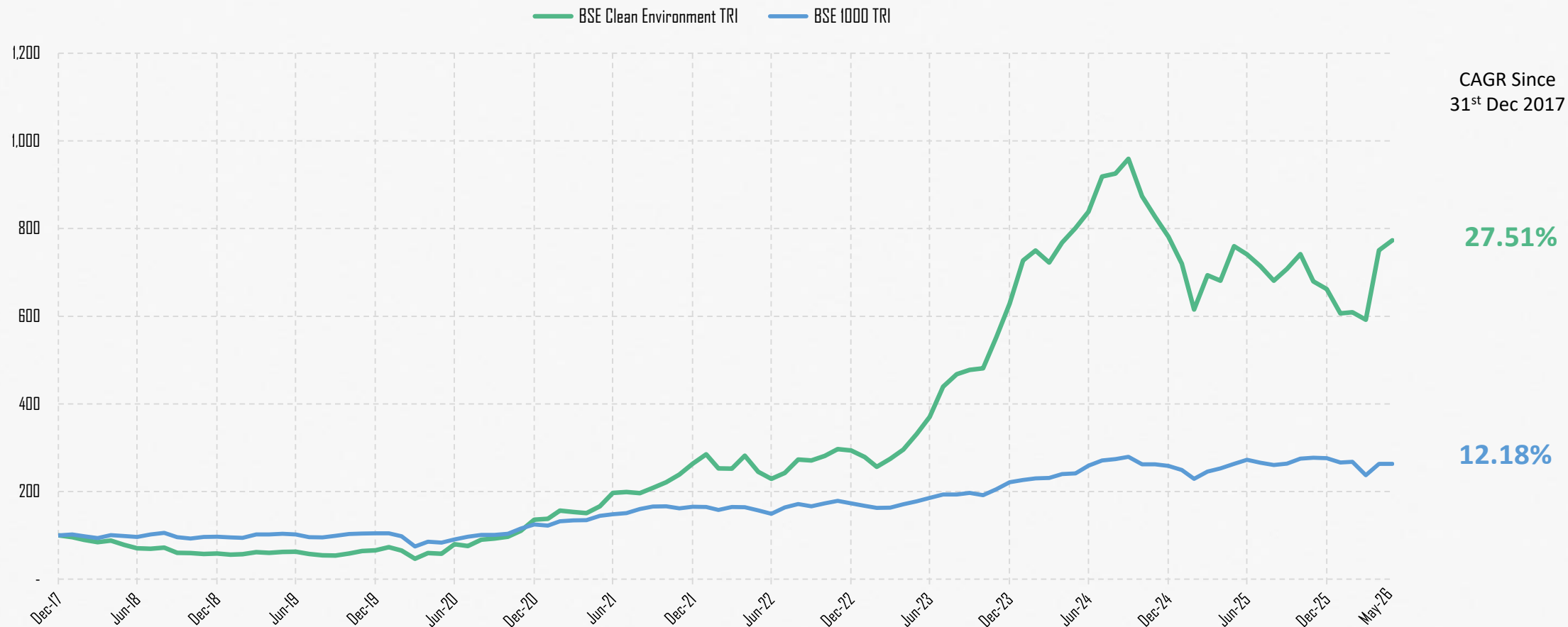


Macro Economic Sectors % (AMFI)



Historical Performance

BSE Clean Environment has outperformed BSE 1000 over the long term



Source/Disclaimer: BSE. Performance as on 29-May-26. The performance is based on historical data and may vary in the future depending on market conditions and economic factors. Performance results have many inherent limitations and no representation is being made that any investor will, or is likely to achieve. Past performance may or may not be sustained in future and is not a guarantee of any future returns. The above graph is used to explain the concept and is for illustration purpose only and should not be used for development or implementation of an investment strategy.

Lumpsum Performance

BSE Clean Environment has consistently outperformed the BSE 1000 over shorter and longer periods

Index		1 year	3 year	5 year	7 year
BSE Clean Environment TRI	CAGR	1.73%	32.63%	36.02%	43.41%
BSE 1000 TRI		0.06%	13.99%	12.72%	14.26%
BSE Clean Environment TRI	Annualised Volatility	21.56%	27.15%	26.21%	27.28%
BSE 1000 TRI		13.75%	14.24%	14.43%	17.67%
BSE Clean Environment TRI	Risk Adjusted Returns	0.080	1.202	1.374	1.591
BSE 1000 TRI		0.004	0.983	0.881	0.807

Not ESG. Not Energy.
The Only Index Built Purely Around Clean Environment Theme.

BSE Clean Environment Index ≠ ESG Index

Clean Environment Index

ESG Indices

Objective

Revenue from clean activities only

Score well on ESG parameters

Selection

>25% revenue from clean environment activities

ESG score ranking – no revenue test

Sectors

Renewables, EV, water, waste & Recycling only

Financials, IT, Consumer & more

Portfolio

~25 pure play stocks

Broad diversified basket (Usually >50 stocks)

Clean Environment Index invests in businesses **built around** clean activities — not just companies that **score well on ESG parameters**.

Two Completely Different Portfolios

BSE Clean Environment (Top 10 Constituents)

Constituents	Weight
Suzlon Energy Ltd.	15.8%
Adani Green Energy Limited	13.7%
Tata Power Co.Ltd.	12.6%
Jsw Energy Ltd	9.1%
Waaree Energies Limited	8.4%
Nhpc Ltd.	6.9%
Ather Energy Limited	5.2%
Mtar Technologies Limited	4.7%
Premier Energies Limited	3.5%
Ntpc Green Energy Limited	2.7%

≠

BSE 100 ESG (Top 10 Constituents)

Constituents	Weight
Hdfc Bank Ltd.	8.5%
Icici Bank Ltd.	6.8%
Reliance Industries Ltd.	6.7%
Bharti Airtel Ltd.	3.9%
Larsen & Toubro Ltd.	3.6%
Infosys Ltd.	3.0%
State Bank Of India	3.0%
Axis Bank Ltd.	2.8%
Kotak Mahindra Bank Ltd.	2.1%
Itc Ltd.	2.1%

ESG Owns Banks and IT.
Clean Environment Own Solar Plants and Wind Farms.

BSE Clean Environment Index ≠ Energy Index

Clean Environment Index

Approach

Bottom-up –
each stock earns its place via revenue

Selection

>25% revenue from clean environment activities

Sectors

Renewables, EV, water, waste & Recycling only

Fossil Fuels

Zero – Structurally excluded

Energy Index

Top-down –
included by sector/industry classification

Membership of defined energy industries –
no revenue test

Broad energy –
includes oil, gas, coal & conventional power

Present –
Conventional energy is a significant part

Nifty Energy invests in the energy sector – including fossil fuels.

Clean Environment Index invests in companies **solving** the energy problem – focused on clean energy, water, and waste solutions.

Performance Comparison

BSE Clean Environment has historically outperformed the ESG and Energy Indices

	Period	BSE Clean Environment TRI	BSE 100 ESG TRI	BSE Energy TRI
Annualized Returns	1 Year	1.73%	-2.40%	1.74%
	3 Year	32.63%	10.38%	16.99%
	5 Year	36.02%	10.18%	13.96%
	7 Year	43.41%	12.79%	15.75%
Annualized Volatility	1 Year	21.56%	13.11%	14.59%
	3 Year	27.15%	13.09%	19.46%
	5 Year	26.21%	13.78%	19.80%
	7 Year	27.28%	17.84%	24.20%

Why Act Now?

Index Valuation at a Reasonable Level

BSE Clean Environment Index PE has fallen from a peak of **71.54** to **56.32** – a **21%** correction from the top

BSE Clean Environment Index - PE Ratio



Stock level valuations have reset sharply

Company Name	PE on 26-Sep-2024	PE on 29-May-2026	% Change in PE
Inox Wind Ltd.	1,241.22	37.74	-96.96%
Waaree Renewable Technologies Ltd.	168.89	21.21	-87.44%
Suzlon Energy Ltd.	128.31	24.82	-80.66%
Premier Energies Ltd.	106.03	31.79	-70.02%
Inox Green Energy Services Ltd.	208.60	63.20	-69.70%
KPI Green Energy Ltd.	53.01	17.50	-67.00%
Olectra Greentech Ltd.	164.56	54.61	-66.81%
Gravita India Ltd.	66.94	31.03	-53.64%
Adani Green Energy Ltd.	266.39	146.21	-45.11%
Ion Exchange (India) Ltd.	37.12	23.58	-36.46%
JSW Energy Ltd.	66.19	46.48	-29.79%
VA Tech Wabag Ltd.	36.49	25.76	-29.39%
NHPC Ltd.	26.07	21.05	-19.29%
EMS Ltd.	23.71	20.00	-15.65%
Tata Power Company Ltd.	41.17	35.86	-12.90%
Ganesha Ecosphere Ltd.	73.12	63.86	-12.66%
SJVN Ltd.	49.67	46.11	-7.17%
MTAR Technologies Ltd.	133.08	257.32	93.36%

12 of 18 companies have seen PE contraction of over **25%** from Markets peak in Sep-2024 – with **7 stocks** down more than **60%**.

Out of 25 index constituents, 18 companies are shown above. The remaining 7 are excluded as the company was either in losses or not listed as on 26th September 2024.

Earnings Growth Remains Strong

Company	FY2026 PAT Growth YoY
Inox Green Energy Services Ltd.	368%
Waaree Renewable Technologies Ltd.	109%
Waaree Energies Ltd.	101%
Acme Solar Holdings Ltd.	99%
Websol Energy System Ltd.	95%
MTAR Technologies Ltd.	80%
Premier Energies Ltd.	61%
KPI Green Energy Ltd.	56%
Suzlon Energy Ltd.	53%
JSW Energy Ltd.	39%
Olectra Greentech Ltd.	29%
VA Tech Wabag Ltd.	26%
NHPC Ltd.	24%
Gravita India Ltd.	21%
NTPC Green Energy Ltd.	10%
Tata Power Company Ltd.	7%
Enviro Infra Engineers Ltd.	6%
Inox Wind Ltd.	3%
Adani Green Energy Ltd.	-1%
SJVN Ltd.	-22%
Ion Exchange (India) Ltd.	-31%
EMS Ltd.	-50%
Ganisha Ecosphere Ltd.	-63%

18 of 25 companies reported positive EPS growth in **FY2026** – with **12 companies** growing earnings by more than **25%**.

Earnings momentum remains broad-based across renewables, EVs, water and recycling – confirming that the theme's **fundamentals are intact** even as valuations have reset.

PAT growth for Ather Energy & Ola Electric Mobility Ltd. is not presented as the base EPS was negative.

Source/Disclaimer : Factset. BSE. Data as of 29-May-2026 .The information/data herein alone is not sufficient and should not be used for implementation of an investment strategy. The table/charts mentioned above are used to explain the concept and is for illustration purpose only It should not be construed as an investment advice to any party. The stocks referred above should not be construed as recommendations or It should not be construed as investment advice to any party. Past performance may or may not be sustained in future and is not a guarantee of any future returns. The Scheme may or may not have any present or future positions in these stocks.

Why this Fund?

**A Megatrend Backed by
Policy and Capital**

**Strong Earnings Growth
Amid Market Correction**

**Pure-Play Clean Economy
Exposure**

**Entire Clean Ecosystem
captured in a Single Fund**

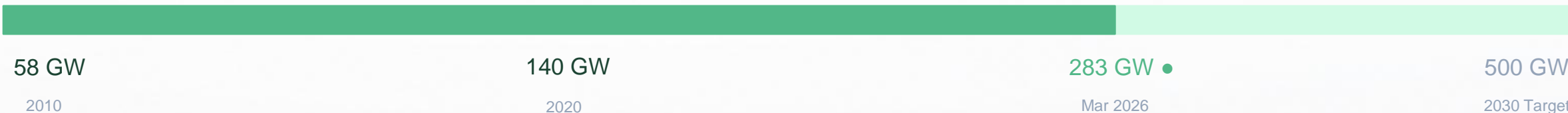


**Be part of the clean
revolution today.**

Annexure

The Road to 500 GW – India's Clean Energy Ambition

NON-FOSSIL CAPACITY JOURNEY (GW INSTALLED)



83%

Of all new power sector investment went to clean energy in 2024 (IEA)

First time
in 50+ yrs

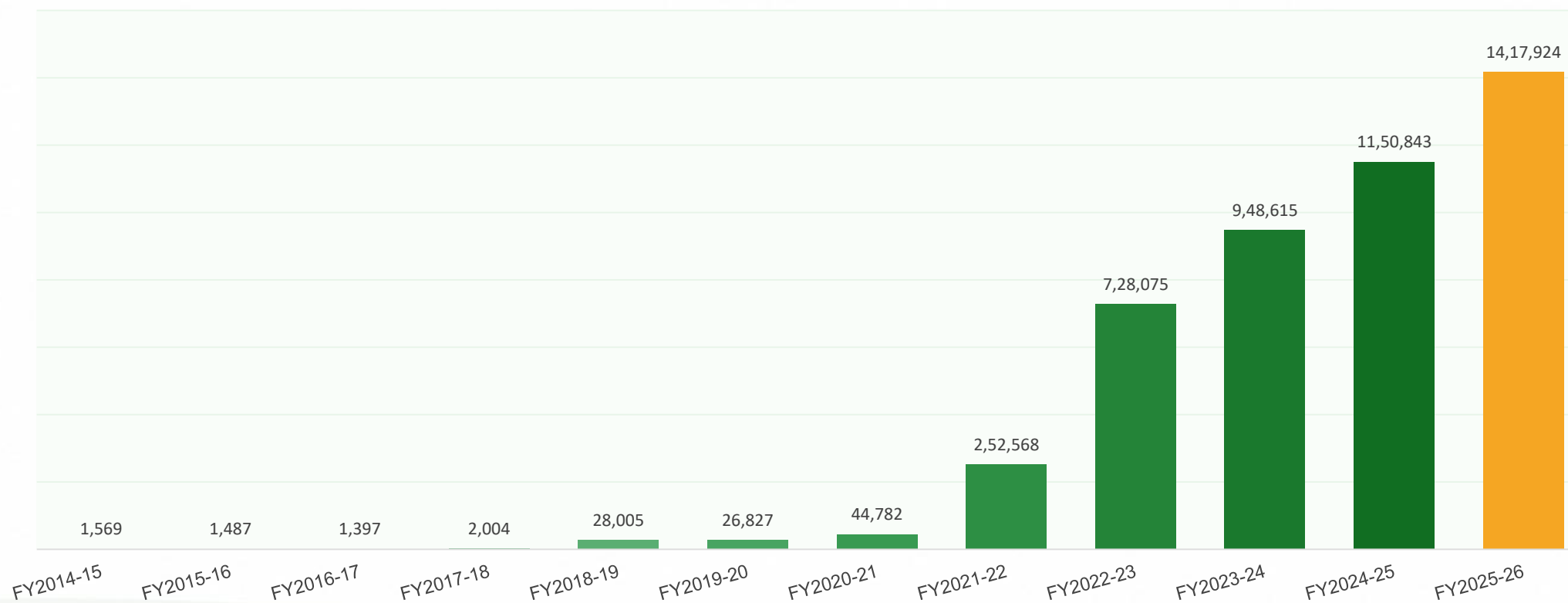
Coal-fired power generation fell in a full calendar year (2025)



India's EV Revolution is Riding on the 2-Wheeler

E2Ws sold **14.2 lakh units in FY26** — commanding **57% of India's total EV market** and growing **22% YoY** even as GST cuts reduced the price gap with petrol 2-Wheelers

India EV 2-Wheeler Sales



Index Constituents – Basic Industries & Weights

Power Generation

RENEWABLES

Adani Green Energy Ltd.	13.7%
JSW Energy Ltd.	9.1%
NHPC Ltd.	6.9%
NTPC Green Energy Ltd.	2.7%
SJVN Ltd.	1.5%
KPI Green Energy Ltd.	1.1%
ACME Solar Holdings Ltd.	0.9%

Integrated Power Utilities

RENEWABLES

Tata Power Co. Ltd.	12.6%
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Heavy Electrical Equipment

RENEWABLES

Suzlon Energy Ltd.	15.8%
Inox Wind Ltd.	2.5%

Other Electrical Equipment

RENEWABLES

Waaree Energies Ltd.	8.6%
MTAR Technologies Ltd.	4.7%
Premier Energies Ltd.	3.5%
Websol Energy System Ltd.	0.9%
Waaree Renewable Technologies	0.7%

Diversified Commercial Services

RENEWABLES

Inox Green Energy Services Ltd.	0.8%
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2/3 Wheelers

EVs

Ather Energy Ltd.	5.2%
Ola Electric Mobility Ltd.	2.4%

Passenger Cars & Utility Vehicles

EVs

Olectra Greentech Ltd.	1.4%
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Water Supply & Management

WATER

VA Tech Wabag Ltd.	2.0%
Ion Exchange (India) Ltd.	0.9%
Enviro Infra Engineers Ltd.	0.3%

Industrial Minerals

RECYCLING

Gravita India Ltd.	1.4%
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Other Textile Products

RECYCLING

Ganesha Ecosphere Ltd.	0.4%
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Waste Management

WASTE

EMS Ltd.	0.2%
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Sub-theme:

Renewables

EVs

Water

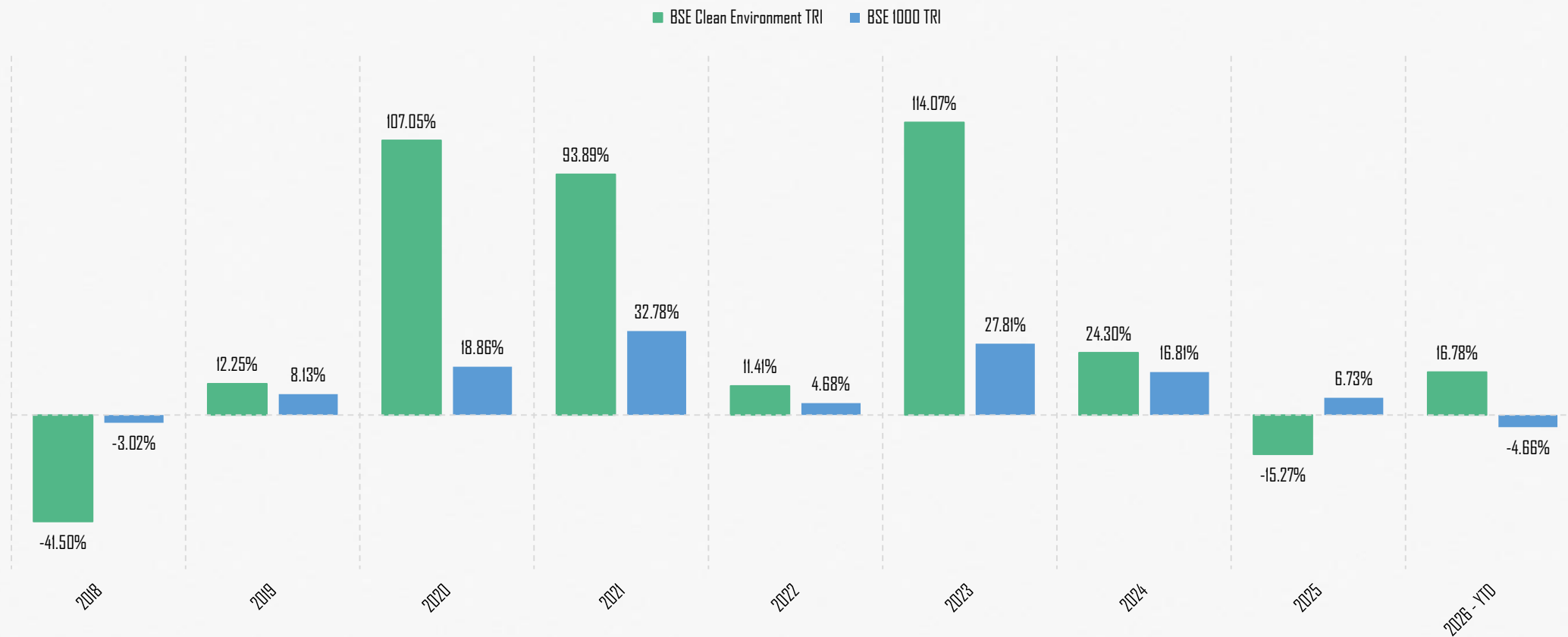
Recycling

Waste

Source/Disclaimer: BSE. Data as on 29-May-26. Macro Economic Sectors as per AMFI Industry Classification. The stocks/sectors mentioned above are used to explain the concept and is for illustration purpose only and should not be used for development or implementation of an investment strategy. The stock may or may not be part of our portfolio/strategy/ schemes. It should not be construed as investment advice to any party. Past performance may or may not be sustained in future and is not a guarantee of any future returns.

Calendar Year Returns

BSE Clean Environment TRI has outperformed BSE 1000 TRI 6 times in last 8 calendar years



Source/Disclaimer: BSE. Performance as on 29-May-26. Performance results have many inherent limitations and no representation is being made that any investor will, or is likely to achieve. The above graph is used to explain the concept and is for illustration purpose only and should not be used for development or implementation of an investment strategy. Past performance may or may not be sustained in future and is not a guarantee of any future returns.

Index SIP Performance

BSE Clean Environment TRI	1 Year	3 Year	5 Year	7 Year
Returns	25.59%	12.02%	27.64%	41.75%
Amount Invested	1,20,000	3,60,000	6,00,000	8,40,000
Market Value	1,35,723	4,30,453	11,83,793	36,54,092

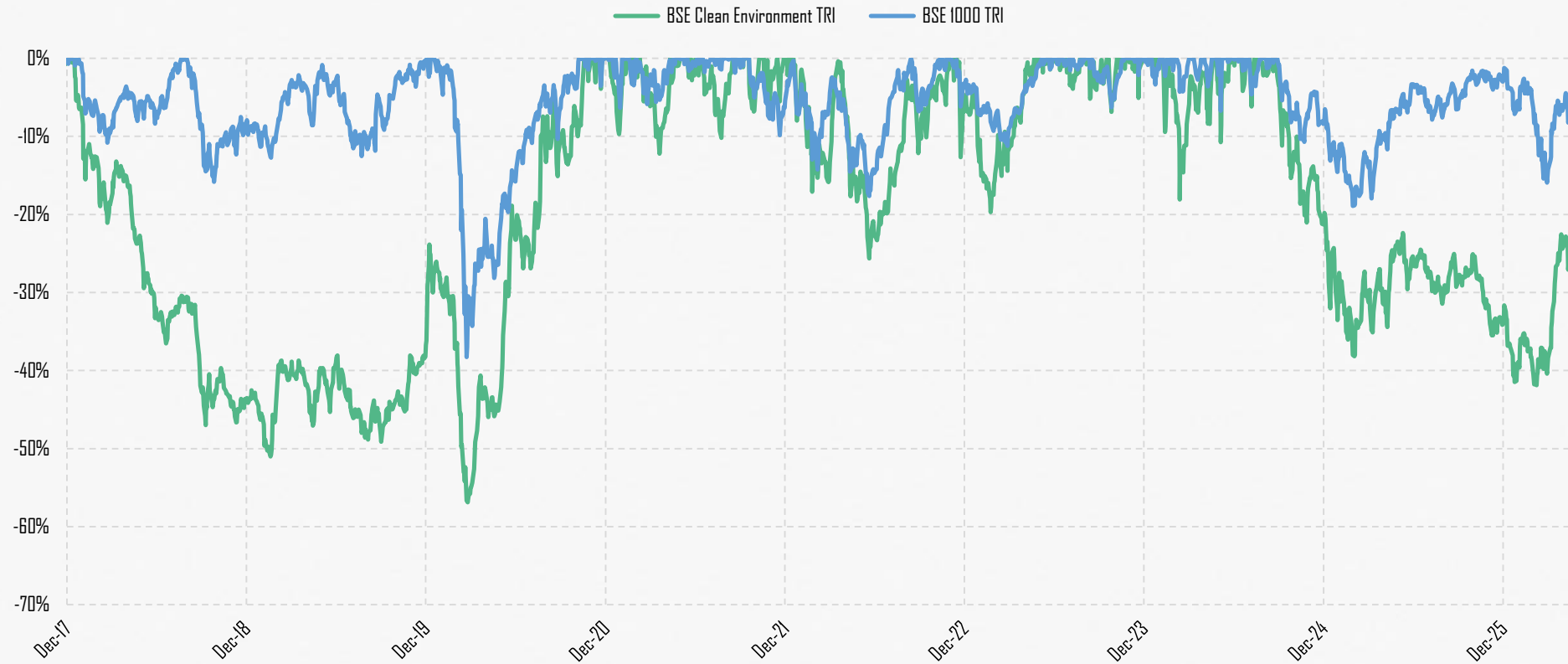
BSE 1000 TRI	1 Year	3 Year	5 Year	7 Year
Returns	-1.80%	6.08%	10.57%	14.36%
Amount Invested	1,20,000	3,60,000	6,00,000	8,40,000
Market Value	1,18,853	3,94,601	7,81,962	13,99,609

Data as of close of May 29, 2026 For SIP returns, monthly investment of INR 10,000/- invested on the first business day of every month has been considered. Performance is calculated using Total Return Index, with zero cost/expenses. Past performance may or may not be sustained in the future and is not a guarantee of any future returns.

Source/Disclaimer: BSE. Performance as of close 29-May-26. Performance results have many inherent limitations and no representation is being made that any investor will, or is likely to achieve. XIRR method is used to calculate SIP returns. The above investment simulation is for illustrative purpose only and should not be construed as a promise on minimum returns and safeguard of capital. SIP does not ensure a profit or guarantee protection against a loss in a declining market. It should not be construed to be indicative of scheme performance in any manner. The above are not scheme SIP returns, but simulation of index SIP returns. Past performance may or may not be sustained in future and is not a guarantee of any future returns.

Drawdowns

BSE Clean Environment TRI has historically exhibited higher drawdowns than BSE 1000



Source/Disclaimer: BSE. Performance as on 29-May-26. Performance results have many inherent limitations and no representation is being made that any investor will, or is likely to achieve. Past performance may or may not be sustained in future and is not a guarantee of any future returns. The above graph is used to explain the concept and is for illustration purpose only and should not used for development or implementation of an investment strategy.

Motilal Oswal BSE Clean Environment Index Fund

About the Fund – Motilal Oswal BSE Clean Environment Index Fund



Type of Scheme

An open-ended fund replicating/tracking the BSE Clean Environment Index



Investment Objective

The investment objective of the scheme is to provide returns that, before expenses, correspond to the total returns of the securities as represented by BSE Clean Environment Index, subject to tracking error. However, there can be no assurance or guarantee that the investment objectives of the scheme will be achieved.



Minimum Application Amount

During the NFO:

Lumpsum – Rs 500/- and in multiples of Re 1/- thereafter

Ongoing basis:

Lumpsum – Rs 500/- and in multiples of Re 1/- thereafter

Multiple **SIP** frequency options are available, for more details, please refer <https://www.motilaloswalmf.com/>



Exit Load

1% - If redeemed on or before 15 days from the date of allotment.

Nil - If redeemed after 15 days from the date of allotment.

Exit Load will be applicable on switch amongst the Schemes of MOMF. No Load shall be imposed for switching between Options within the Scheme. Further, it is clarified that there will be no exit load charged on a switch-out amongst the plans within the same scheme.

Taxation

Long-term Capital Gains – 12.5% on gains above ₹1.25 lakh (held for more than 12 months)

Short-term Capital Gains – 20% (held for up-to 12 months)



Tax treatment of mutual funds is subject to change. The tax information provided is for general informational purposes only and is not intended as tax advice. Investors are advised to consult their tax advisor before making any investment decisions and tax advice



Fund Managers

For Equity Component

Mr. Swapnil Mayekar

Mr. Dishant Mehta (Associate Fund Manager)

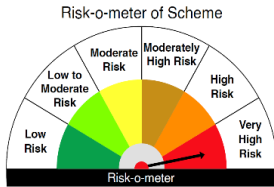
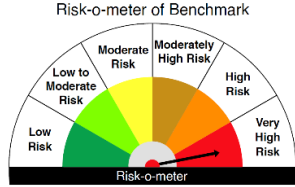
For Debt Component

Mr. Rakesh Shetty



Date of Allotment

25th June 2026

This product is suitable for investors who are seeking*	Scheme Riskometer	Benchmark Riskometer
<ul style="list-style-type: none"> • Long-term capital appreciation • Return that corresponds to the BSE Clean Environment Index, subject to tracking error 	 <p>The risk of the scheme is Very High</p>	 <p>The risk of the Benchmark is Very High</p>

*Investors should consult their financial advisers if in doubt about whether the product is suitable for them. The above product labelling assigned during the New Fund Offer (NFO) is based on internal assessment of the scheme characteristics or model portfolio and the same may vary post NFO when the actual investments are made. For latest risk-o-meter, investors may refer to the Monthly Portfolios disclosed on the website of the Fund viz. <https://www.motilaloswalmf.com/>

Disclaimers

This has been issued on the basis of internal data, publicly available information and other sources believed to be reliable. The information contained herein is for general purposes only and not a complete disclosure of every material fact. The stocks/sectors mentioned herein are used for explaining the concept and is for illustration purpose only and shall not be construed as an investment advice to any party. The stocks/sectors mentioned may or may not be part of our portfolio/strategy/ schemes. Past performance may or may not be sustained in future. The information/data/charts herein alone is not sufficient and should not be used for development or implementation of any investment strategy. All opinions, figures, estimates and data are as on date.

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The material is based upon information that we consider reliable, but we do not represent that it is accurate or complete, and it should not be relied upon as such. Opinions, if any, expressed are our opinions as of the date of appearing on this material only. While we endeavor to update on a reasonable basis the information discussed in this material, there may be regulatory, compliance, or other reasons that prevent us from doing so. Recipient shall understand that the aforementioned statements cannot disclose all the risks and characteristics. The recipient is requested to take into consideration all the risk factors including their financial condition, suitability to risk return, etc. and take professional advice before investing.

Scheme Specific Risk Factors - The scheme invests primarily in companies linked to clean environment activities such as clean energy, water management, waste management and recycling, resulting in a concentrated thematic exposure. Performance is therefore closely tied to regulatory developments, government policies, technology adoption and capital expenditure cycles in these areas.

Passive Investments - The Scheme is not actively managed. Since the Scheme is linked to index, it may be affected by a general decline in the Indian markets relating to its underlying index. The Scheme as per its investment objective invests in Securities which are constituents of its underlying index regardless of their investment merit. The AMC does not attempt to individually select stocks or to take defensive positions in declining markets.

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SEBI Registration Details: Name – Motilal Oswal Mutual Fund, Registration – MF/063/09/04

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