

THE RIGHT
TIME TO
GROW BIG[>]
IS NOW



GROW BIG!

TO KNOW MORE OR FOR ANY QUERIES:

+91 97699 72825 | growbig@motilaloswal.com

Motilal Oswal Financial Services Ltd.

Motilal Oswal Tower, Junction of Gokhale & Sayani Road, Opposite Parel ST Depot, Prabhadevi, Mumbai - 400025

www.motilaloswal.com

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 and IPOs. • 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. *MOFL 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. 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. <Subject to the provisions of SEBI Circular CIR/MRD/DP/54/2017 dated June 13, 2017 and the terms and conditions mentioned in rights and obligations statement issued by the TM. (If applicable). ^Account would be open after all procedure relating to IPV and client due diligence is completed

Mr. Sandeep Shukla (BSE Trade Name: Rudra Financial Services And Research) BSE: AP0104460111471. Date of Registration: 30 September 2011 (NSE Trade Name: Rudra Financial Services and Research.) NSE: AP029774881. Date of Registration: 30 September 2011. Mrs. A. Kausalya (Trade Name: A. Kausalya) NSE: AP0297083471. Date of Registration: 21 Nov 2013. BSE: AP0104460130094. Date of Registration: 21 Nov 2013. Mr. Vaibhav Shah (Trade Name: Shah Smita Vaibhav BSE: AP0104460132759. Date of Registration: 29th Apr, 2014 NSE: AP0297084691 Date of Registration: 23rd Apr, 14. Mr. Varun Taneja & Mr. Vinkal Rathee (Trade Name: Starbucks Investments) NSE: AP0297084852 Date of Registration: 19th May, 14 BSE: AP0104460133040. Date of Registration: 19th May, 14. Mr. Urvish Vasanwala, Mr. Taral Tailor and Mr. Abhishek Shah (Trade name: Pathway Investments) BSE: AP0104460127120. Date of Registration: 20th May, 13. NSE: AP029781372 Date of Registration: 20th May, 13. Mr. Patibandla Rahul Chand (Trade Name: Patibandla Rahul Chand) NSE: AP0297083501. Date of Registration: 22nd Nov, 13. BSE: AP0104460130078. Date of Registration: 22nd Nov, 13. Mr. Munish Garg (BSE Trade Name: PRIYANKA) BSE AP0104460133563. Date of Registration 20-Jun-14 (NSE Trade Name: PRIYANKA) NSE: Registration No. AP0297085241 Date of Registration: 20-Jun-14. Mr. Sachin Jain & Mr. Gaurav Kumar (BSE Trade Name: BANYAN TREE WEALTH MANAGERS LLP) BSE AP0104460141450. Date of Registration 29-May-15 (NSE Trade Name: BANYAN TREE WEALTH MANAGERS LLP)) NSE: Registration No. AP0297089324 Date of Registration: 12-May-15. Mr. Rasesh Shah (BSE Trade Name: SHAH HETAL RASESH) BSE: AP0104460136968. Date of Registration: 8-Dec-14 (NSE Trade Name: SHAH HETAL RASESH) NSE: AP0297087201. Date of Registration: 8-Dec-14. Mr. Bobba Kishore (BSE Trade Name: Maven Financial Services) BSE: AP0104460140061. Date of Registration: 15-Apr-15 (NSE Trade Name: Maven Financial Services) NSE: AP0297088942. Date of Registration: 9-Apr-15. Mr. Amit Jain (BSE Trade Name: AMIT JAIN) BSE: AP0104460136607. Date of Registration: 21-Nov-14 (NSE Trade Name: AMIT JAIN) NSE: AP0297086891. Date of Registration: 19-Nov-14.

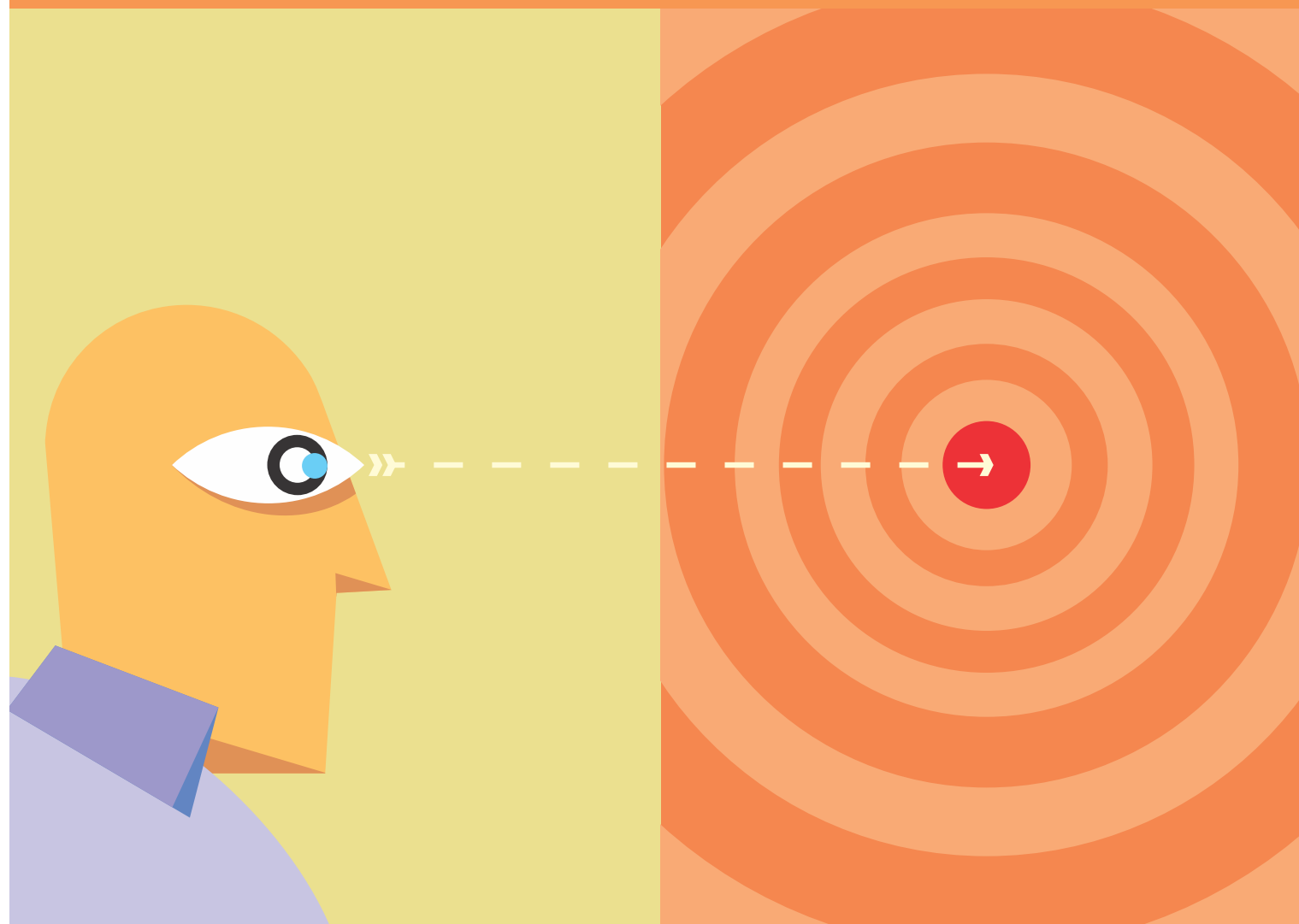
>Investment in securities market are subject to market risks, read all the related documents carefully before investing.

Ver-4 (OCT2019)

WE HELP YOU
GROW BIG[>]

**IF YOU HAVE
A BIG GOAL IN MIND**

**WE HELP YOU KEEP
YOUR EYES ON IT.**



You have a dream and you're on the path to make it true. You have the passion and the capability to pursue the journey towards your dream. But you may not be aware of the opportunities and challenges that lie on your journey ahead. Journeys need guide maps, goals need directions. We have taken a long journey to reach our goals successfully thereby building experience and expertise, that you can leverage.

- Reputed financial services group engaged in Broking & Distribution, Institutional Equities, Investment Banking, Private Equity, Wealth Management, Asset Management and Home Finance
- 30+ years of capital market experience
- Over 10 lakh registered customers
- Pan India presence with 2200+ outlets
- Best Performing National Financial Advisor Equity Broker' at the CNBC TV18 Financial Advisor awards 5 Times
- Winner of 'Best Broking Business of the year 2018' at the Money Control Wealth Creator Awards



All through these years, we have been able to successfully develop an ecosystem which can help you fast-track your growth. With our in-depth research, expert advice and the most advanced and reliable technological tools for today's financial markets, you can successfully optimize your time, effort and resources and keep your eyes on the big goal.

**PARTNER WITH US,
AND MASTER THE PATH TO GROW BIG[>]**

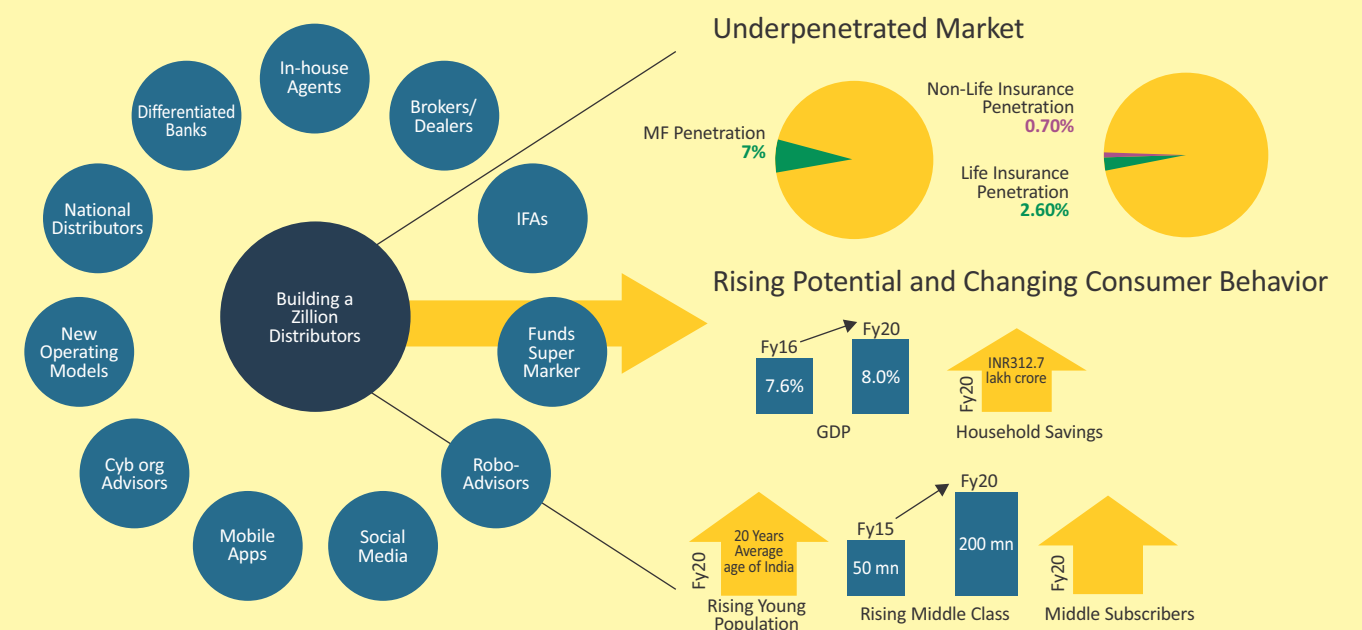
**GET READY
TO BE A PART OF
THE NEXT BIG
OPPORTUNITY**

As an entrepreneur, you started with helping people convert their savings into investments, but you have always dreamed of growing big, by exploring all the opportunities that help you do so. Financial intermediation is one such big opportunity.

Now look at the bigger picture. With Indian GDP forecasted to grow in future coupled with rising household savings and expanding middle class population, there are ample opportunities for the penetration of financial products in the market. Building a chain of zillion distributors is a need for the financial services firms to tap the underlying business potential in the country.

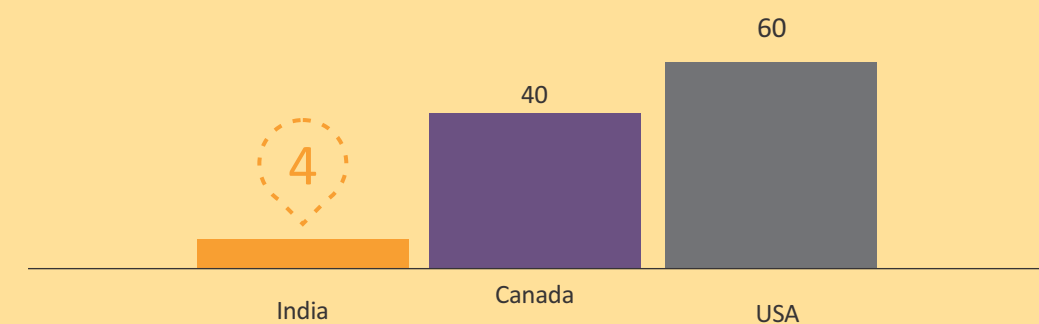
THINK BIG. GROW BIG[>]

Building a zillion distributors - need and scope



Source: KPMG Report

Equity savings as % of GDP



Source: https://smartinvestor.business-standard.com/market/story-564590-storydet-MF_equity_assets_only_4_of_Indias_GDP_lags_global_average_of_35_Report.htm#Xb_JxHszblU

**OTHERS HAVE
MADE IT BIG,
SO CAN YOU.**



We know it's not easy to capitalize on big opportunities. But we, at Motilal Oswal Financial Services Limited (MOFSL), who started as sub-brokers ourselves, have made it big and helped a number of our Business Partners GROW BIG[⁝] with us.

Out of the 2200+ outlets we have all over the country, 98% are being run by our Business Partners. We clearly believe that growth comes through our Business Partners, and this belief is the reason why we do everything in our power to help them GROW BIG[⁝]. Here are a few such stories:



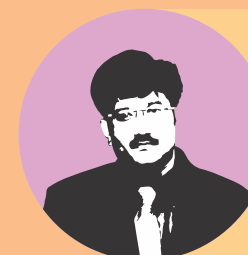
**Paresh
Sukhtankar**

Paresh Sukhtankar was a practicing Chartered Accountant. In 1999, he became a Motilal Oswal Business Partner. With his passion and MOFSL's Solid Research, Solid Advice and Solid Execution, today, he is the CEO of his own firm with 2300+ clients.

Siddharth Karnawat, though based in a small town (Beawar-Rajasthan), always had a passion for Broking. He became our Business Partner in 2005 and with the support of MOFSL systems, processes and people, his revenue has increased multifold and clients have increased from 50 to 5000+.



**Siddharth
Karnawat**



Kavish Shah

Kavish Shah started his business with us in 2005 with 1 outlet in Kolkata and 18 clients made up of family members. MOSFL's strong marketing support, RMS support and brand pull has helped Kavish increase his presence to 40+ outlets and 14000+ clients.



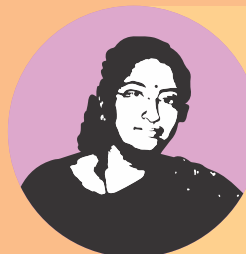
Madan Lohiya

Madan Mohan Lohiya was a sub-broker in 1995 with 350 clients. In 2002, feeling the need for better research-based advice and all round support, he became our Business Partner. In just a few years his client base has grown multifold, from 350 to 6700+ clients and so have his revenue.



**Bhawarlal
Agarwalla**

Bhawarlal Agarwalla moved from Jaipur to Guwahati in 1992 to venture into stock broking. He started his business from a single rented office and he has now expanded to 20+ offices. He added a new dimension to his business when he joined hands with Motilal Oswal in 2002. He has been a consistently high performing Business Partner and is now a part of our "Hall of Fame" since 2012.



**Uthara
Ramakrishnan**

Ms. Uthara Ramakrishnan had a sub-broking business in Calicut, Kerala. With a vision to expand; she joined hands with MOFSL. Uthara's ambition coupled with MOFSL's experience of organic and inorganic growth, has helped her grow to 10+ outlets across Kerala with a client base of 7500+ and revenues rising multifold in these years.



**Kapil
Karnawat**

Kapil Karnawat started his association with us in 2005, when the broking industry was undergoing major changes of direct billing of customers from broker, centralization of back office at broker level, etc. As a result of MOFSL's strong Risk Management Services, well-known brand and efficient customer support and his passion, today he has over 4300+ clients and 4 offices.



**Munish
Garg**

Munish Garg was a Cluster Manager with a broking firm in Panipat. He had a zeal to start something on his own and he found MOFSL to be the right partner. With support from MOFSL in business development, processes and technology, his income has grown multiple times compared to his annual CTC as an employee.

Prashant Pimpalwar was in the stock market business since 1987. He had a 200 sq.ft. office in Nagpur, a staff of 2 and around 400 clients. In 2003, he joined Motilal Oswal as a Business Partner. With his efforts and MOFSL's strong brand, world-class research and professional support team, he has added 35 more offices and has 13000+ clients, a staff of over 60 and a 5000 sq. ft. office building.



**Prashant
Pimpalwar**

Harish Belman was working as a professor in an engineering college when the desire to do 'something different' led him to set up Premier Investments at Udupi in 1990. As his customers increased, their expectations from Premier Investments also increased. What started as a business with 30 clients, after joining Motilal Oswal as a Business Partner, now boasts of 3000+ clients with robust client additions every year.



**Harish
Belman**



**Suresh
Loya**

Suresh Loya associated with MOFSL in 2000. With his dedication and MOFSL's Solid Research, Solid Advice and Solid Execution, he has grown his business today to 40+ offices and over 22,500 clients. Due to his consistent performance and growth, he was inducted in MOFSL Hall of Fame in 2009.



**Rajendra
Manudhane**

Rajendra Manudhane, a Chartered Accountant (CA) by profession was always fascinated with the stock market. His passion for the markets got him to join hands with MOFSL in 2002. Today, Rajendra and his son Mayur (also a CA) along with the Solid Research of MOFSL, have taken their firm (KRM Securities Pvt. Ltd.) from 1 office to 10+ offices and from 270 clients to 9000+ clients.

You too could be a part of this growing list.
THINK BIG. GROW BIG[>]

**TAKE ADVANTAGE OF
BIG OPPORTUNITIES AND
GROW BIG^⁷ WITH US!**



With future-ready technological tools, innovative products and continuous training and business development program, we'll help you in your journey of growing big. After all, we share your dream.



Partner with us.
THINK BIG. GROW BIG^⁷.

EXTENSIVE EXPERIENCE TO HELP YOU GROW BIG[>]

Interact with seasoned professionals with immense experience in the Broking & Distribution Industry. Every member of the senior management team has been with Motilal Oswal for many years and that will provide you stable support in your growth journey. These are people who have seen different market cycles and have the right insights to grow a business across market cycles. They have also managed the Direct-to-Client business and hence understand customer needs and can provide you the requisite inputs to fulfill them.



Ajay Menon
Whole-time
Director & CEO,
Broking and
Distribution

**26 years experience,
21 years with MOFSL**

Ajay is the MD & CEO of Broking & Distribution Business of Motilal Oswal Financial Services Limited (MOFSL). He joined the Group in 1998 and has been responsible for Operations, Compliance, Legal, Risk Management, Business Process Excellence and Information Technology. Mr. Menon is also a member of the Institute of Chartered Accountants of India. He has also cleared the Series 7, 24 and 63 of FINRA Regulations.



Harsh Joshi
Director and
Head IFA &
Investment
Product Business

**24 years experience,
19 years with MOFSL**

Harsh is a management graduate from the Institute of Technology & Management, Mumbai. He joined the Lexicon Group of Companies in 1995, where he was managing the stock broking business. He joined Motilal Oswal in 2000 and has handled various profiles including Client Servicing, Client Acquisition and Franchisee Acquisition. He has been responsible for developing the entire Franchisee and Branch Business and also played a key role in developing the Wealth Management business of Motilal Oswal. He has also handled the corporate affairs of the Motilal Oswal Group with the Chairman's office. He presently heads the IFA & Investment Product business and is instrumental in developing the same in Motilal Oswal network.



Gaurav Manihar
Associate
Director & Head,
Franchisee Business
& Advisory

**18 years experience,
16 years with MOFSL**

A Chartered Accountant by qualification, Gaurav has rich and varied experience in the Non - Institutional Broking segment. During his tenure at MOFSL he has started a branch from a scratch and made it one of the biggest & most profitable branches of the company, recruited more than 100 Management Trainees and groomed them in a very short period of time to become equity advisors handling HNI clients, headed MOFSL PCG Broking handling more than 2000+ HNI families serviced by highly qualified 75+ member advisory & sales team, headed MOFSL Equity Advisory comprising 300 + equity advisors, lead the advisory training function for MOFSL and worked closely with franchisees for their business development.



Kishore Narne
Associate Director and
Head, Commodity
& Currency Business

**18 years experience,
7 years with MOFSL**

Kishore started his career in commodities in 2001 with Refco Commodities (Currently Phillip Commodities) servicing their global customer base and creating research for global audience well before the Indian Commodity Markets started. Kishore joined MOFSL in 2012 and has used his experience to make MOFSL one of the largest players in commodities and currency trading. He has been awarded "India's Best Commodity Analyst" by Zee Business in 2011, and "India's Best Research Analyst for Forex" in 2014. He is also a regular author in many newspapers and financial magazines.



Sandeep Gupta
Sr. Group Vice
President &
Head Franchisee
Advisory

**26 years experience,
19 years with MOFSL**

After completing his graduation Sandeep started his career with a sub-broker (Supriya Investments) in 1993. He joined Motilal Oswal in the year 2000 and has been a key part of the Franchisee Advisory since then. Over the span of 16 years, he has been instrumental in the growth of many franchisees. His passion & understanding of markets has helped him set up excellent processes on the advisory front and also create unique and innovative trading products for retail clients



Arbab Mujtaba
Sr. Group Vice
President,
Broking &
Distribution

**15 years experience,
13 years with MOFSL**

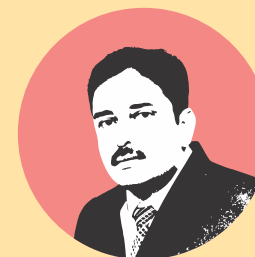
An Electronics Engineer and MBA from Mumbai University, Arbab started his journey in MOFSL in the PMS department and has worked across departments handling Franchisee Business & Direct Branch Business for over a decade. With his expertise in Sales & Business Development, MF and PMS Advisory, he has been instrumental in establishing the MOFSL Business Partner business in the North, and growing branch business for Punjab and Uttar Pradesh. He's currently the National Sales Head for Franchisee Acquisition.



Ramnik Chhabra
Executive Director,
Marketing

**27 years experience,
13 years with MOFSL**

Ramnik has worked in advertising at Grey Worldwide, Ogilvy & Mather and JWT. His experience includes working on different brands for clients like P&G, Unilever, Oracle, General Motors, Philips, SBI-GE, DSP Blackrock Mutual Fund, UTI Mutual Fund and Standard Chartered Bank. He has won an Effie (Ad Club Mumbai Ad Effectiveness Award), Stevie (AMA International Business Award) and Indian Marketing Association awards. Ramnik heads the Marketing function for the MOFSL group.



Pankaj Purohit
Senior Executive
Group Vice President,
Information Technology

**21 years experience,
15 years with MOFSL**

Pankaj has earlier headed Development, Testing, System Operation, and the Trading Helpdesk at MOFSL. He has been instrumental in successfully developing industry-first initiatives like the Lite Trading System, Mobile Trading Application, Paperless EKYC, RiskLab, etc.



Arun Chaudhary
Senior Group
Vice President
& Head, Product
Development &
Online Business

**12 years experience,
8 years with MOFSL**

Arun is an MBA Finance from the Institute of Management Technology. Prior to joining Motilal Oswal he has worked with ICICI Securities and Dun & Bradstreet. During his tenure with MOFSL, he played an instrumental role in setting up various business units right from scratch, including Online Account Opening Business, Reactivation Business, Lead generation, Large Client & Branch Business Programs, Marketing & Communications, etc. In his current role, he heads the Online Business & Product Development teams, where he has been successful in doubling the online business penetration across channels and also launched various first-in-the-industry platforms, within a period of one year.



Anupam Agal
Senior Executive
Group Vice President,
Business Operations

**21 years experience,
17 years with MOFSL**

A Chartered Accountant with immense experience in Capital Markets, Anupam handles Risk Management, Legal & Compliance, and Customer Service Departments at MOFSL



Siddhartha Khemka
Senior Group
Vice President
& Head,
Retail Research

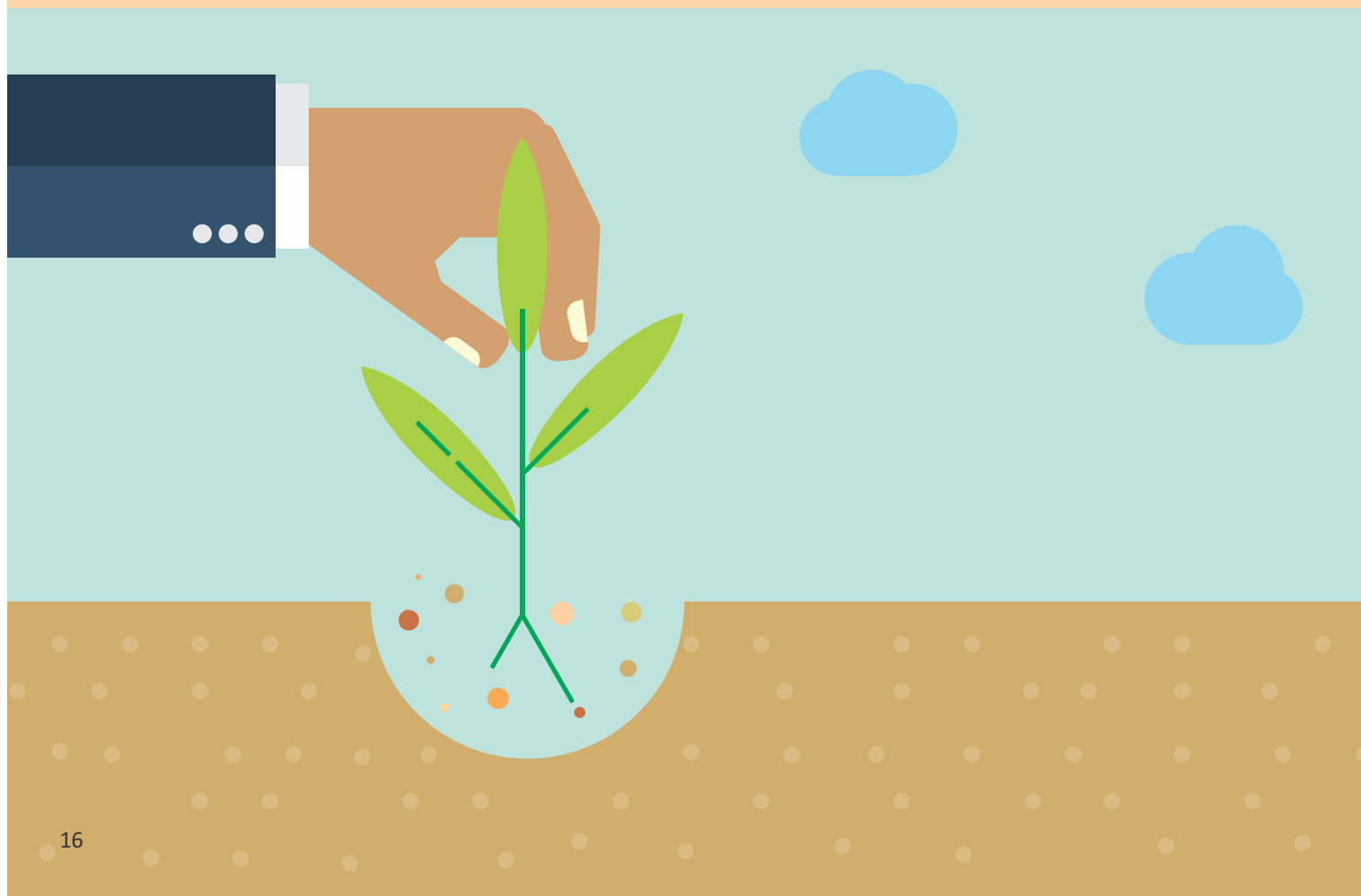
**13 years experience,
2 year with MOFSL**

A MBA Finance from K. J. Somaiya Institute of Management Studies & Research - Mumbai. Siddhartha joined Motilal Oswal group in 2017 and is currently managing the Research desk for the Retail business. His past experience includes working with Centrum Wealth Management, Centrum Broking as Institutional research analyst and ICICI Securities as Mid Cap analyst.

Over the years he has received several awards and recognition including ET Now Thomson ReutersStarmine Analyst Award' and Zee Business 'Best Market Analyst Award'. He is regular guest on Business Channels like CNBC TV18, ET Now, BloombergQuint amongst others.

SOLID BUSINESS DEVELOPMENT INITIATIVES

At Motilal Oswal, we believe it's important to begin right, and that's why we have made it a habit to help each of our Business Partners begin the partnership with all the right resources to grow the business. This is also what sets us apart from the competition. We provide everything that is required to begin your journey, learn the tricks of the trade, acquire new customers and get set on the road to growth.



COMPREHENSIVE ONBOARDING SUPPORT

To help our Business Partners hit the ground running, we provide comprehensive onboarding support through the following initiatives:



Dedicated regional language advisory and business development desk to help you with timely research, advice and business development ideas and support



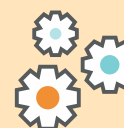
Focused and time-bound approach to help onboard initial set of new clients or migrate from your existing setup



Dedicated onboarding desk of operations team for smooth transition



Knowledge support for better understanding of systems and processes related to Back Office Operations and Risk Management Systems



A well-defined process to safeguard against losses due to account migration

HR SUPPORT

We believe it is important to have people with the right mind and the right heart to work with you to achieve the most optimum results. That's why we have a dedicated HR support that facilitates the following:



Staff Recruitment: A dedicated team to help our partners recruit their employees, with requests facilitated through an online module, and arrangement for recruitment meetings and interviews



Partner and Staff Training: Regular training by Motilal Oswal and Industry Professionals on soft skills, products and processes to increase the productivity of the team using physical training as well as online training using PAATHSHALA app.



Best Practices in Motilal Oswal Group HR: Motilal Oswal Group is consistently rated among the most preferred employer to work with. We use our experience and excellence techniques to share with our Business Partners so that they are able to build and nurture a great team which will be a catalyst for their future growth

EXTENDED BUSINESS DEVELOPMENT SUPPORT

To help our Business Partners begin the growth process, we provide extended business development support through the following:



Dedicated product specialists and personalized meetings of these experts with Business Partners and their end clients to not only pitch various products, but also to ensure a bigger allocation of the customer's money



Client acquisition support with strategy, tactics, leads, startup kit, marketing collaterals, events and seminars



Local marketing strategy as per Business Partner's strengths and opportunities in the market



Regular Business Development Workshops conducted by experts and senior management from Motilal Oswal to share insights on market trends, new products, technology, and devise strategies to adopt for further growth



Networking with 2200+ successful Business Partners of MOFSL Learning from their best business practices, what works and what does not work



Exclusive Client Relationship Management (CRM) software for Business Partners and their staff to help manage customer data and customer interaction, access business information, automate sales, manage employee customer support, etc.



Marketing Connect: This is an innovative initiative to help you in your Online lead generation and promotion efforts. This initiative give you

- Increased Visibility on Google Search
- Ease of navigation and contact ability for leads
- Dedicated Webpage for your franchise
- Improved Quality of leads
- Dedicated Facebook page for you
- Transparent Reporting
- Google Review Management



Exciting Contests for growth of various Products & Services which not only ensure push for the business but also offer tangible and intangible benefits for Business Partners



Regular training and knowledge building initiatives: Daily and weekly examinations for Business Partners and their front office staff to keep them updated about markets and economy thereby increasing client satisfaction

INNOVATIVE TECHNOLOGY SUPPORT FOR YOUR BUSINESS

In today's fast and digital era, efficiency is everything. We have specially crafted advanced tools to help you manage your business efficiently and service your clients better than ever.



Advisory Dashboard

In the technological world of financial services, each client you cater to has different needs and requirements. The most challenging task for you would be to find the right opportunity for every client at the right time to generate sustainable business revenue from your clients.

Our advisory dashboard will help you solve this challenge. It provides the right recommendations and actionable data of your clients to enable you with the right business pitch. It also does an in-depth analysis of your clients' trading and behavior pattern to help you fulfill their investing/trading needs



Suggest Me (A solution for every client's need)

Day in and day out, while attending client meetings or on phone conversations, you come across multiple questions or needs related to the clients. How to address all these needs in a systematic way?

'Suggest Me' is a solution designed exclusively to address basic needs of an investor by suggesting good portfolio mix for your clients based on their needs. It also provides recommendations in personalized report which can be used in your client interactions



UpperMOST (Business intelligence just a click away)

UpperMOST App and Web are designed to help you manage your business efficiently and effectively. It not only aims to improve your business but also gives you a clear understanding of various trends on Revenue, Assets under Management, Sales and new client acquisition over a period of time. UpperMOST platforms offer a plethora of advanced features



Digital Account Opening (Hassle-free Online Account Opening)

Tired of time-consuming formalities for opening your lead's account? Motilal Oswal's online account opening is a unique solution to help you convert your leads in a matter of minutes. It also helps you follow up with your leads seamlessly with the real-time dashboard providing status on each lead

DEDICATED RE-ACTIVATION DESK

Working to get new clients is a continuous goal, but do you know that you can increase your revenues manifold if you also re-activate clients who have been inactive for a long time? That's why we have a unique, dedicated re-activation desk which helps our Business Partners generate additional revenues.



MOST Select - A Premium advisory desk specially initiated to cater the ever increasing needs and demands of your HNI clients



Retail Reactivation Desk - Dedicated desk to give extraordinary products, services and support to you as well as your Retail Clients

REWARDS & RECOGNITION

It is important to acknowledge and appreciate the good work done by our Business Partners. We do that sincerely with our Reward & Recognition program which is unique in the industry.



National & Regional awards for Best Performing partners every year



Induction to the MOFSL 'Hall of Fame' for consistent outstanding performers



Regular rewards to Business Partners for achievements in various business parameters

MOTILAL OSWAL BUSINESS IMPACT CONFERENCE (MOBIC)

MOBIC is an Annual event meant for our select partners. This platform combines best of Knowledge, Networking, Motivation and Entertainment.



Insights from Industry Experts - Prominent industry leaders come in the session to imbibe their knowledge and share insights about current market scenario



Experience the Fintech Expo - Financial Expo displaying all our hi-tech products and services across businesses



Awards Nite - Facilitating our Business Partners for several award categories in the financial year so as to celebrate their success from growing Incrementally to Exponentially

SOLID PRODUCTS AND TECHNOLOGY

Investment strategies depend upon the Investor's objectives and risk appetite. To serve a wide range of customers with customized Investment strategies, it's important to have a wide range of products that reap benefits across varied time horizons and risk appetites. Motilal Oswal is a one-stop financial superstore where there's a wide range of investment solutions for every kind of Investor. Further, with the advantage of superior technology, access to solutions over a variety of communication devices is possible in real-time, making the experience of trading in financial markets as smooth as possible.



BROKING PRODUCTS

Explore the wide range of cutting edge products designed especially for your clients to trade and invest seamlessly. You too can reap its benefits by encouraging your clients to invest in these products.



TradeGuide Signal (TGS)

TradeGuide Signal is an innovative trend guiding tool which automatically generates actionable Buy/Sell trading ideas for all asset classes



Advice on Combination of Equities (ACE)

Experience the new era of Investing through ACE (Advice on Combination of Equities) – our diverse range of pre-packaged equity products, ideal for Traders & Investors who want to participate in the markets but don't have enough time to manage their portfolio



Portfolio Restructuring Tool (PR)

Bad portfolios always carry higher risks and tend to impact not only your clients' investments but also revenue and turnover for your business. Portfolio Restructuring Tool provides personalised insights on your clients' portfolios, thus helping them reduce risks and increase potential returns



Suggest Me

Suggest-Me helps your clients take suitable investment decisions to fulfil their needs by recommending a suitable portfolio based on their investment horizon and style.



Me-Gold

Me-Gold powered by MMTC –PAMP, is the purest form of gold (999.9) which your clients can securely buy, sell or store with an option of doorstep delivery, anytime and anywhere. Your clients can even opt to start a GSP (Gold Savings Plan) with Me-Gold



Option Express

Option Express is a series of strategic option calls which provides both single-leg and multi-leg strategies on a daily basis to help active traders make quick and well-informed decisions that give positive results



Option Strategy Builder

An innovative tool that makes it easy for traders to plan their trades with live spread updates and execute them at pre-defined Entry and Exit price levels without manual intervention



Sensibull

Sensibull is a dynamic platform for tracking and trading in the most profitable options contracts in the market. It is designed to help you find and execute the best possible options strategies as per your views on selected options contracts



Power Trade

A new and intuitive single-screen menu that helps your clients place multiple orders in different scrips across segments and square off open positions in 1 click. It also gives real-time and Total MTM updates on your clients' individual and overall positions

INVESTMENT PRODUCTS



Mutual Fund

Equity Mutual Fund, ELSS Funds, Balanced Funds, Arbitrage Funds, Short term Debt Funds, Accrual & Credit Funds and Duration Funds



PMS

MOAMC Value Strategy, MOAMC NTDOP, MOAMC IOP, MOAMC IOP V2, MOAMC BOP, ASK IEP, Invesco DAWN, Renaissance Midcap Portfolio, Renaissance Opportunity Portfolio and Alchemy High Growth PMS



ALTERNATE ASSETS

AIF Funds-Cat III (Renaissance AIF), IREF IV (Real Estate) and Structured Products



FIXED INCOME

Fixed Deposits, Preference Shares, Perpetual Bonds, High Credit Bonds & NCDs, Capital Gain Bonds and Government of India Bond



INSURANCE

Term Insurance, Endowment & ULIP

COMMODITY

Another asset class from where you can earn is Commodities and Currency. Commodity trading brings a basket full of diverse avenues for Investment, away from the traditional avenues of Equity, Bonds and Real Estate. Based on the historical data, adding Commodities exposure to your client's existing portfolio helps your clients increase the returns while lowering the risk. Commodities have very little or negative correlation with other asset classes.

Option to trade across Bullion, Metals, Energy, Agro and other Commodities in NCDEX and MCX

Unique Value Plus product leverage tool helpful for Intraday traders having limited margins

Exposure of upto 3-4 times of available funds for Value Plus product

Real-time fund transfer facility to get instant limit or reduce risk percentage

Customized offering based on your profile - Investor, Trader, Hedger, Speculator or Arbitrageur

Optimum Strategy High conviction positional and spread trades in Commodities

CURRENCY

A market that attracts about \$5.2 trillion in daily volume, recognized as the world's largest market, accessible globally 24 hours a day - that is exactly what the Currency market is made up of. You can make your client's trade in Currencies through their existing Equity account.

Option to trade in all instruments ranging from Currency Futures, Currency Options to Inter-currency trading

Flexibility to trade across all exchanges NSE-CD, BSE-CD & MSE-CD.

No separate Investments required - Utilize your margins and collaterals across Equity, F&O, Currency segments

Customized offering based on your profile Investor, Trader, Hedger, Speculator or Arbitrageur

INNOVATIVE TECHNOLOGY FOR CLIENTS

Our cutting-edge trading and investing platforms, available on App, Web and Desktop, are powered with intuitive and intelligent tools to help you trade, Invest and track markets and investments seamlessly.

MO INVESTOR PLATFORM



A financial fitness platform designed exclusively for investors, enriched with unique benefits and loaded with investing products like **ACE**, **Me-Gold**, etc.

MO TRADER PLATFORM



An instant trading platform for advanced traders with real-time quotes, advanced charts, instant execution and trading products like **TradeGuide Signal** and **Grab Your Opportunity**.

SMART WATCH APP



It is a unique app designed especially to enable clients to get all vital information about their **Investments and markets** with **instant notifications** for important market and portfolio updates



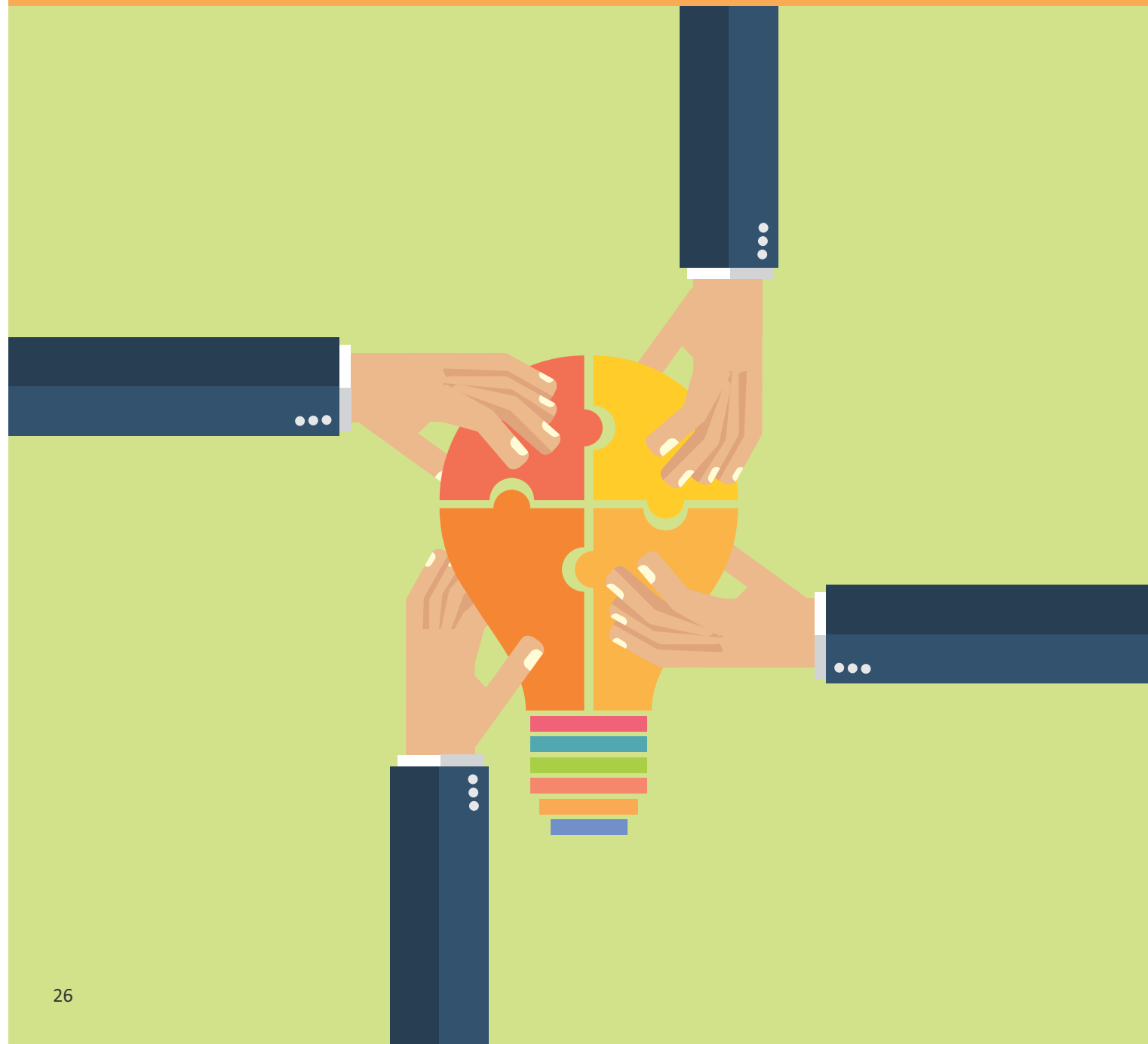
Portfolio & Market Update— Get instant info on global indices, market top gainers and losers. Stay updated on your Portfolio on real-time basis; on the move

DESKTOP EXE APPLICATION



A power-packed desktop trading platform that provides in-depth research and insights to clients. It also offers quick trading execution with **1-second refresh rate** and technology enabled leverage for **20x more margin**

SOLID RESEARCH AND ADVICE



Known and loved by our Business Partners and Customers for our Solid Research & Solid Advice, we have also been **awarded the 'Best Performing National Financial Advisor Equity Broker' at the CNBC TV18 Financial Advisor awards 5 Times**. Our dedicated research team analysts does the fundamental and technical analysis of the market, covering over 230+ companies across more than 21 sectors.

RESEARCH REPORTS

DAILY REPORTS



Our research team delivers insightful research reports daily to our customers. Reports such as Morning India, Market Outlook, Market Roundup, Commodities Morning/Evening and Market Bytes are extremely popular amongst our customers

WEEKLY AND MONTHLY REPORTS



Our research teams provide weekly and monthly updates that act as a round-up of the market as well as actionable ideas for the next month. MOST Valuation Guide, Corporate Action Monitor, Commodity & Currency weekly are some of the prominent weekly reports, while MOST Advisor and MOST Quantitative Outlook are the prominent monthly reports

INDUSTRY REPORTS



Our Research also focuses on certain sectors, resulting in knowledgeable reports that analyze the current situation of the sector and foresee future trends. Auto Dashboard, Metals Weekly, Healthcare Monthly (Indian Pharma market tracker), Insurance Tracker are some of the many sector-specific reports that we have

INDIA STRATEGY REPORT



India Strategy Report is a quarterly release, where we give the overall market strategy along with earning expectations. Nifty EPS, Sector Allocations and Model Portfolios are the critical ingredients of this report

WEALTH CREATION REPORT



The annual Wealth Creation Report, our most famous research report, is a work of our Co-founder, an equity research stalwart, Mr. Raamdeo Agrawal. He analyzes the most consistent, the fastest and the biggest value creators in the Indian equity universe every year

THEMATIC REPORTS



Periodic thematic reports like Bulls & Bears, Corner Office, Ecoscope, Fund Folio etc. give insights on the happening in organizations and on the current macro-economic trends in India

COMPANY REPORTS



In-depth reports of more than 230 listed companies

ADVISORY PRODUCTS



We have also devised special Advisory products in Equity, catering to varied risk-and-return need profiles

DELIVERY IDEAS



Delivery ideas offer model advisory portfolios in addition to carefully crafted strategies which cater to customers with varied risk profiles, helping customers to hold a solid portfolio at all times

INVESTMENT IDEAS



Investment ideas are a result of intense research within the large and mid cap space and contain fundamentally good stocks which could be potential multi-baggers with a horizon of six months to a few years



MOST Equity Multiplier: Dedicated Multicap portfolio containing 50% Large-cap and upto 50% Mid-cap

Characteristics:

- Portfolio requirement of INR 10 Lakhs
- 15 companies to invest in at the maximum, 10 minimum
- Adheres to our QGLP philosophy

MOMENTUM TRADING

Momentum Trades are trading opportunities generated keeping in mind very short-term price movements and thus have a higher risk attached to them. These trades are based on short-term technical trends and stock-specific news and have a very short shelf life.

ACE (ADVICE ON COMBINATION OF EQUITIES) ADVISORY PRODUCTS



A diverse range of pre-packaged equity products ideal for both traders and investors who want to participate in the markets but do not have enough time to manage their portfolios.



ACE Cash is a robo powered delivery based equity portfolio suitable for investors having a moderate to high risk appetite with an objective to deliver returns in an investment horizon of 3-5 years.



ACE FundTech is an intelligent portfolio with a combination of fundamental and technical parameters which is suitable for investors who want to invest in companies with best financial trend subject to thresholds of Quality and Valuation.



ACE Small Cap is a systematic delivery based equity portfolio that consists of small cap stocks which have potential for high earnings growth.



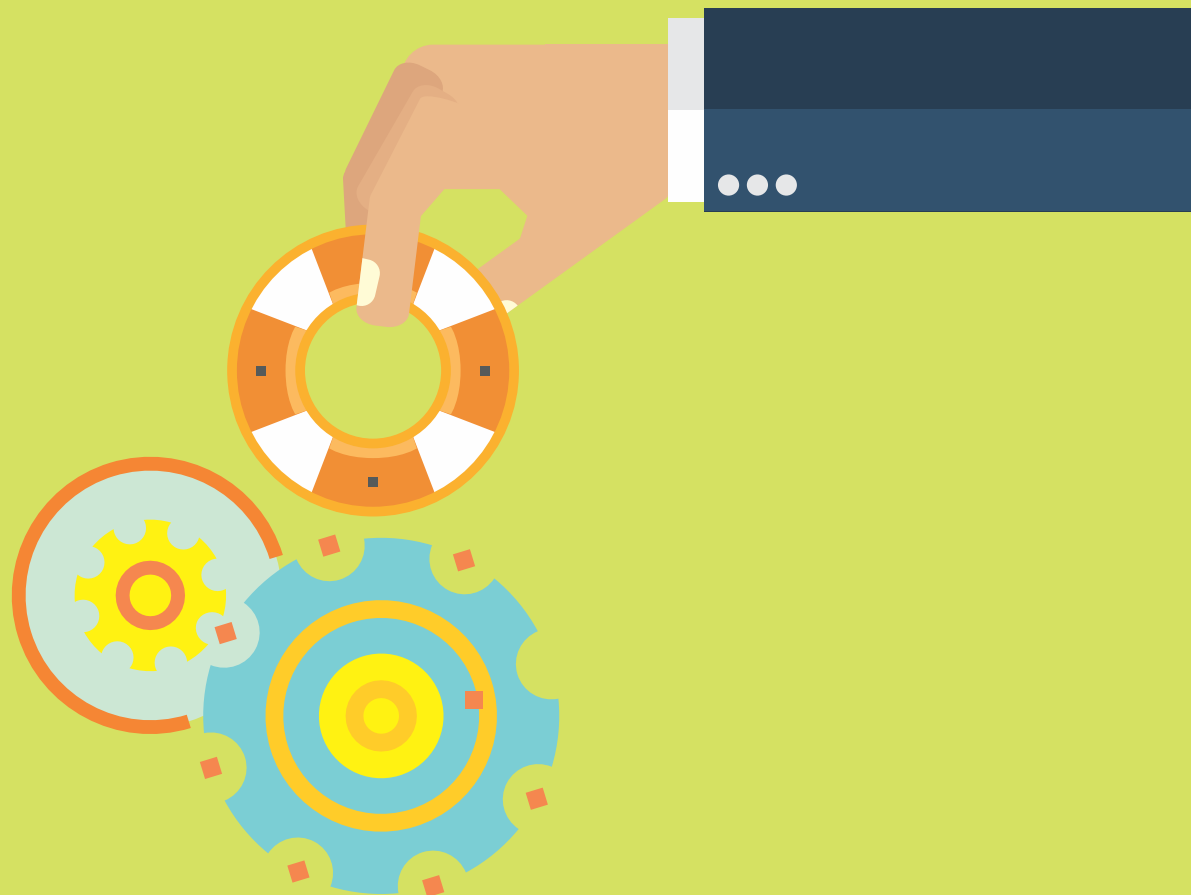
ACE Large Cap is a long-term equity portfolio that consists of large cap stocks with an objective to generate steady returns over a period of time (minimum 3 years).



ACE Smart is an equity portfolio with the objective to generate returns from trading opportunities in fundamentally strong stocks through the support of technical trends.

BACK OFFICE & OPERATIONS

In our vast Stock Broking and Investment experience, we have realized that processes and operations are the backbone of our business. They need to be made robust in order to achieve optimum productivity and efficiency, ensure mitigation of risks, and minimize losses. We extend our robust operations support to all our partners so that they can make a transition to the next level with minimum hassle.



RISK MANAGEMENT SYSTEM

We understand that making a shift to Motilal Oswal from your previous association will involve a lot of risk and may result in business losses. To avoid these risks and losses, we have developed a robust Risk Management System to seamlessly transfer all your business.



Customer-centric Risk Management System and real-time payout

Risk Lab:

Monitoring tool for partners to get real-time updates and client margin status in a single view. The system consists of various automated products for risk management whereby, positions are squared up if MTM loss crosses 70% of available margin.

ROBUST PROCESSES

In today's technology-driven world, it's important to use technology to run processes faster and yet provide the most intuitive interfaces possible. Our robust processes make it easier for you and your clients to begin growth journeys with us.



Single Login Platform to access all kinds of reports - Ledgers, Margin Reports, Shortage, DP statements, P&L statements, etc.



24 x 7 Banking with mobile app/online portal or through CSE for Payin and Payout



Unique automated account opening with account opening on SCAN for immediate account activation



e-KYC^

- 15Mins Demat + Trading Account
- Open 100% paperless demat & trading account in 15 minutes

BACK OFFICE SUPPORT

Technology-driven business processes may be convenient but we believe that without human intervention, the problem-solution loop remains incomplete. We have put together some dedicated teams to resolve your issues.



Customer Service with quick turnaround time with dedicated IVR lines to address requests and issues of our Business Partners, from 9:00 AM to 6:00 PM on working days (Mon-Fri)



Dedicated Compliance & Legal Support for handling and resolution of Business Partner or client disputes

BUSINESS OPERATIONS (BIZOPS) FOR BUSINESS PARTNERS

BizOps is a unified platform for business operations. BizOps, available in Partner Portal, empowers the partners to impart superior servicing to customers. Multiple reports can be generated at a single click. 100+ reports are merged / combined into 30+ reports, which can be downloaded in various formats, in 5 different languages (English, Hindi, Marathi, Gujarati, Telugu)



No need to remember multiple login passwords - Multiple Software applications are accessible from a single window



Global Search - Enter keywords/name of the report and easily access requisite information



Ease of Access - BizOps can be accessed through all latest browsers and on all handheld devices



Dashboards with pictorial presentation - Summary of branch operational activities. User-friendliness with reduced navigation concerns of shifting to different segments and different applications



Essential links are readily available on a single click - Easy access to important sites, Client overview in a single window, Customized view of client profile



MTF (Margin Trading Facility)⁶ The product offer by exchange in Capital Market where client can carry their position just by maintaining minimum margin



e-DIS Customer in individual category can transfer the shares online through his web login (value of per scrip up to 2 lakh and total scrip value up to 5 lakh)



e-Modification With an objective to give faster and best services to our clients, we have facilitate them with e-Modification option. E-Modification will not only speed up the process of modification but also introduce the paperless facility (only for customers with Aadhaar no. updated in back office system)



Online Segment Addition This feature enable customer with paperless segment addition. Client who have Equity holding above 50k can use this feature to activate his account in any other segment.



MO-Genie Automated chatbot to facilitate existing customers to access several operational reports



Admin To extend our support understanding the business need we serve our Business Partners with Admin facility which enables them to manage the client's additional limit



Knowledge Corner

1. To enhance your knowledge and to update you with latest change we conduct online webinars from time to time
2. We have short training PPTs, Videos and FAQ made available in BizOps > Customer Service option
3. Our initiative of sending Ops Tackle and Compliance Knowledge Series helps you manage daily Ops activities within Compliance framework



Fund transfer through UPI It enables a safe and faster option to transmit fund via UPI (Unified Payment Interface). Using unique BHIM/ UPI ID (VPA), customer can transfer funds from their registered bank account. (With MOFSL).



Robotic Process Automation

Implementation of new age technology for making process robust. Proactive and accurate communication for risk management. Real-time Reconciliation and updation of customer ledger for seamless customer experience



Automated GST Invoice As an additional feature in our Automated GST invoice creation module in BizOps, we have added facility to check the GSTR2A online with Government portal and credit the GST amount and also to generate GST invoice just in one click



Grandfather Capital Gain This feature will help your customer to manage his PNL with reintroduction of long-term capital gains (LTCG) tax on equity investments



Enhanced Mutual Fund reports Our enhanced Mutual Reports in Partner Portal > Ops > Mutual Funds Report new is the unified platform to all your need



Automated Bank Verification Automated bank verification process of EKYC eliminates the Bank Proof upload process. System validates the bank details of client by transferring Rs. 1 through IMPS in client's Bank



NACH The NACH process for client dues helps you to maintain your branch risk arising from bad debtors



Alerts on the move. Clients are made aware of their Derivative Margin shortage on next day of position taken and RMS Selling, one day prior of selling, which helps our Business Partners to collect payment from clients

UNNATI

Unnati is an Industry first certified programme on Broking & Financial Products Distribution business that transforms you into a skilled and knowledgeable Entrepreneur in just 8 weeks.

The word "Unnati" is a Sanskrit word, which means progress, and that is the aim of this programme. The Unnati programme addresses all your needs - Knowledge, Skills and Business ideas. The curriculum is especially developed keeping the latest Broking & Financial Products Distribution Industry trends, technology and practices in mind which include:

- A) Indian Macros
- B) Financial Services Industry
- C) Opportunity in Broking & Distribution
- D) Changing Dynamics and Technology
- E) How to manage and run a profitable Partnership Setup
- F) How to take your business at next level



Get right knowledge with the right skill to run a successful broking business



Start your business with expert hand-holding in booming India economy



Transform yourself in just 8 weeks



Unleash your growth potential and earn your true worth

IT'S YOUR ATTITUDE THAT DEFINES YOUR ALTITUDE

Growing BIG starts with a state of mind. If you think you can do it, then with our Pedigree, Products, Research, Advisory, Technology, Business development and Operational support, you will.

THINK BIG. GROW BIG[>]