



Introducing a Service As Customised As You Want

My **Motilal Oswal**

What you want | When you want | How you want



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GETTING STARTED

To create your own customized, single view page

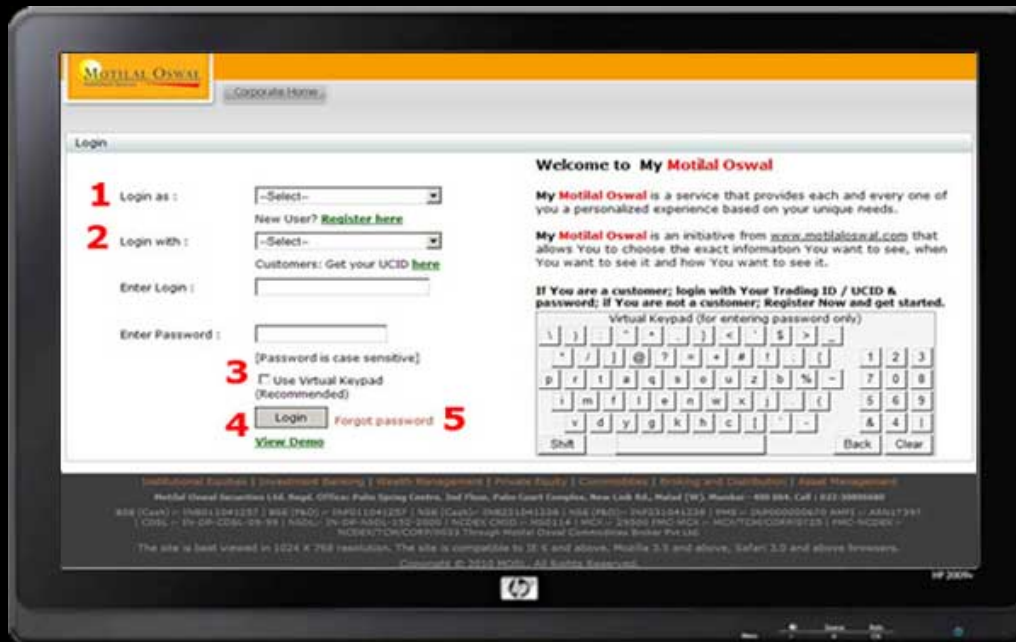
Log on to www.motilaloswal.com click on My **Motilal Oswal**

1. Your Login ID –

- Customer can use their Unique Customer ID (UCID) or Equity Client Code. To get the UCID, clients kindly click on the link below.
- Not a MOSL customer can register by clicking on 'Register Here'.

2. Your Password – You can use your existing website password or click on forgot password link and get the password on your registered email address

3. Your updated email address and mobile number – This is required for us to send you all the alerts to the correct email ID. The default ID and number are the ones you have registered with the back office. To change the same download the application form and apply for a change.



Log In

Customers

- Select Login as 'Customer'
- Select login with either Equity Client Code, UCID or Nickname
- Enter your login ID & Password

Non Motilal Oswal Customers (Guests)

- Select Login as 'Guests'
- Select login with 'Nickname'
- Enter your Nickname & Password

You can use the Virtual Keyboard to avoid Phishing attacks

Forgot Password

- First select Login As, Login With and Login ID
- Click the Forget Password link on the login screen
- To redeem a new password, enter information required on the screen

Customers

- Enter the Registered Email ID (mandatory), PAN Number and Date of Birth or select an Identifier Question

Non Motilal Oswal Customers

- Enter the Registered Email ID (mandatory)
- Type the Characters (Captcha code) shown on screen, in the box provided
- Click Save button, once the details are entered
- A message pops up stating that your password has been sent to your Email ID

CREATING A PAGE



Add a new Tab

In this section a new tab is added above/below the selected tab. The layout and the widgets can be set in this section. Perform the following steps to access tab menu:

- Click on the drop down arrow of the selected tab
- Select the Tab above/below which the New Tab has to be added
- Click on the arrow besides any tab to create a new tab
- To add above click on 'Add Tab Above' and to add Tab below click on 'Add Tab Below' (**refer to no 6/7**)
- Give a Name to the Tab(**refer to no 8**)
- Select the Layout for the tab from the available options(**refer to no 8**)
- Select the Widgets to be added in the tab created
- If the widget You want to add is not present in the list, You can click All Widgets and can add the widget from the list (by default only the widgets that are compatible to the selected layout will be displayed)
- Select the widget and click Add button

The Tab gets added to your my Motilal Oswal Page. The Tab menu is used to Add Tab Above, Below, move Tab Up, Down, Delete & Edit the selected Tab.

Change Layout

To customize the layout of your personal webpage click on the Tab Menu in the selected tab. The layouts are present in four forms:

Layout # 1:



- When user select this Tab Layout, User can add only single column widgets (widget size = 33.33%) in the tab.

Layout # 2



- When user selects this tab layout, User can add either two column widget (widget size = 66.66%) &/or single column widget (Widget size = 33.33%) in the tab.

Layout # 3



- When user selects this tab layout, User can add either single column widget (widget size = 33.33%) &/or two column widget (Widget size = 66.66%) in the tab.

Layout # 4



- When user selects this tab layout only three column widgets (widget size = 100%) can be added in this tab.

Please note that incase you have selected widgets that do not fit in a particular layout; you would not be able to select that particular layout.

Once you have selected a format click and drag the different widgets till you align them the way you want.

Change Theme (Refer to no.15 of above screen)

User has the option to change the Theme of his My Motilal Oswal page from the available scheme of color. To set Theme:

- Click on My Theme
- Select the Theme to be set from the available themes
- Click on Save

WIDGETS

Add Widget

(refer to no.14 in above screen shot)

To add a widget user has to first create a Tab. There are 2 ways of adding a Widget:

Option1

- Select the Tab in which the Widget needs to be added
- Click on Add widget button(**refer to no 14**)
- Click on All Widgets or user has the option to search the widget on its title. (The widgets have been categorized Product wise)

Option2

- Select the Tab in which the Widget needs to be added
- Click on Tab Menu of the selected Tab
- Click on edit Tab
- Click on All Widgets or user has the option to search the widget on its title. (The widgets have been categorized Product wise)

The following activities can be performed in widgets:

Share Widget (Refer to no.20 of above screen)

The favourite market widgets can be referred by the users to their Network. To share a Widget; follow these steps:

- Add Widgets (explained above)
- Click on the widget Menu of the widget to be Shared
- Click on Share Widget
- Enter email address of the person to whom the widget has to be shared
- Kindly type your message if you want to send a customized message
- Click on Send

Referred widget can be checked by clicking on the Referred widgets option from the Quick links.

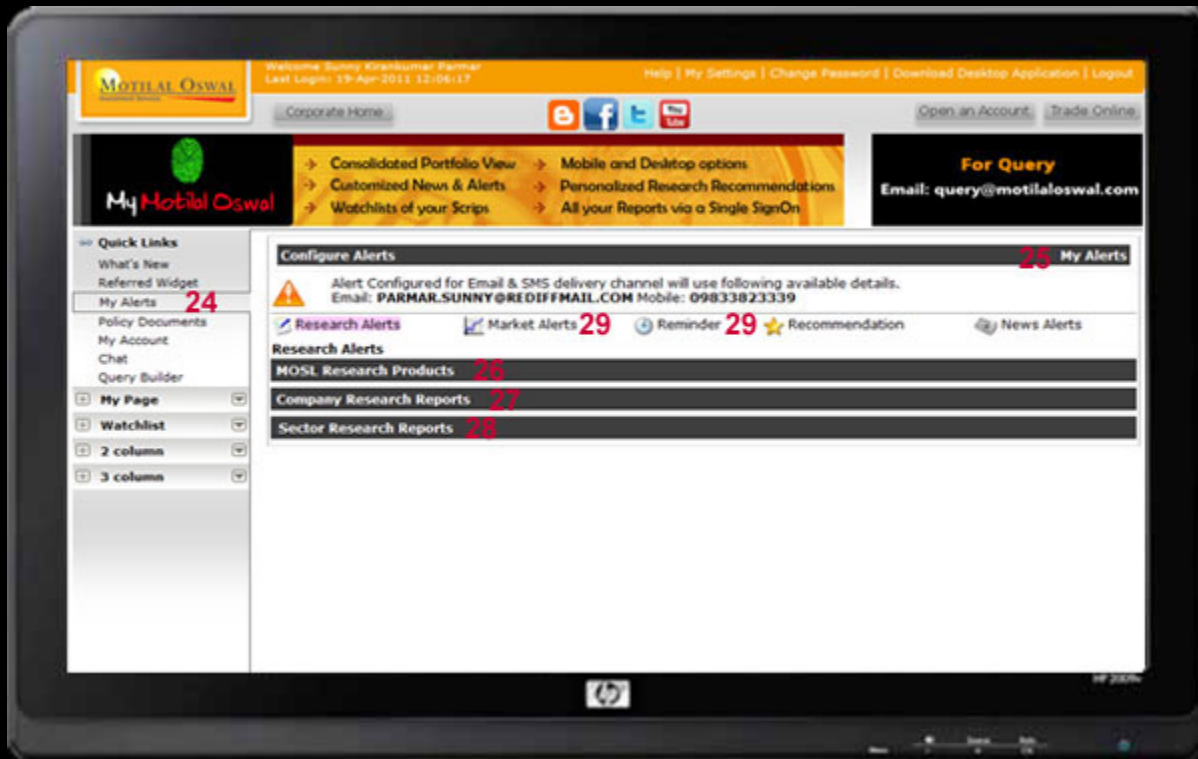
Delete Widget (Refer to no.21 of above screen)

To delete a widget from the Tab click on the Widget Menu and Select Delete Widget. A confirmation screen will appear, once confirmed the widget will be deleted.

Recommended Widget (Refer to no.22 of above screen)

Based on the widgets added by the User Motilal Oswal will Recommend user widget that might be liked by User. Users have the option to add or not to add the same.

SETTING ALERTS



My Alerts Inbox (Refer to no.24 of above screen)

'My Alerts' is a unique way of receiving your favourite Motilal Oswal Research Reports / Price alerts / Reminders on your preferred Channel.

Click on the 'My Alerts' section to customize the alerts you want – in your Alert Inbox, on SMS, on email or on WAP.

Research Based Alert: Motilal Oswal has a wide variety of Research products based on Technical, Fundamental and Thematic analysis of economies, companies and Sectors. Users have to select the interested Research report and select the channel where he wants to read the same. To set Research Alerts:

- Click on the My Alerts option in Quicklink
- Select Configure Alerts

For MOSL Research Products

- Click on Add Alerts
- Select Product, Frequency of the Report, Report Name and Channel
- Click on Save to save your setting

For Company Research Alerts

- Click on Add Alerts

- Select Company Name from the drop down and Preferred Channel for Alerts
- Click on Save to save your setting

For Sector Research Alerts

- Click on Add Alerts
- Select Sector Name from the drop down and Preferred Channel for Alerts
- Click on Save to save your setting

Price Based Alerts: The value based alerts can be used to set Price trigger alerts for your preferred stocks. Select the Company, set alerts, select preferred channel and Save. Perform the following steps in value based alerts:

- Go to My Alerts Pg
- Click on Configure Alerts
- Select Price Based Reminder Alerts
- Click on 'Add Alerts' button
- Select the Company by typing the first 3 letters
- Select the criteria >, <, = and mention the Price
- Select Channel
- Click on Save to Save your settings

The SMS alerts when triggered will be with 15min delay and the Email alerts will be received EOD.

Reminder (refer to no 23) This section is used to set the reminder alerts for Your SIP, EMI or Margin payment due dates. You just have to select the Start and End date along with the Frequency and Description. It gives You the option to select the preferred channel for the alerts i.e. Email or SMS. Perform the following steps in value based alerts:

- Go to My Alerts page
- Click on Configure Alerts
- Select Reminder Alerts
- Click on 'Add Alerts' Button
- Select Start Date, End Date, Frequency, Description and Channel for alerts
- Click on Save to Save your settings

Wealth Watchlist

The screenshot displays the Motilal Oswal Wealth Watchlist interface. At the top, there is a user header with the name 'Bunny Kirandumar Parmar' and a 'Last Login' timestamp. Below this is a navigation bar with 'Corporate Home' and social media icons. A central banner offers features like 'Consolidated Portfolio View', 'Customized News & Alerts', and 'Watchlists of your Scrips'. A 'For Query' section provides an email address: query@motilaloswal.com.

The main 'Watchlist' section is divided into 'Equity Watchlist' and 'Mutual Fund Watchlist'. The Equity Watchlist table is as follows:

Company	CMP	% Change	PE	EPS	Dividend Yield	News	Recommendation	MOST Valuation	Research Reports
MOTILALOFS	133.35	0.49	45.67	2.92	0.90	N	N/A	N/A	N/A
M50 ETF	80.00	0	0.00	0.00	0.00	N/A	N/A	N/A	N/A
MOSWAL M 100	0.00	0	0.00	0.00	0.00	N/A	N/A	N/A	N/A
N100	102.25	0.64	0.00	0.00	0.00	N/A	N/A	N/A	N/A
BHARTI ARTL	375.15	-1.39	19.22	24.65	0.27	N/A	N/A	V	N/A

The Mutual Fund Watchlist table is as follows:

Fund	NAV	% Change	Date	News
Fidelity Tax Advantage Fund (G)	22.38	-1.16	19-Apr-2011	N

Wealth Watchlist - Track your preferred Stocks in cash & Fno markets / Mutual Fund Schemes with their Market Price, P/E, EPS, intraday chart, News/Corporate Announcements, also get Motilal Oswal Securities (MOSL) View* on it. Users can also set Research / News / Market alerts on them.

To Add watchlist (The watch list is a 1 column widget)

- Add Tab
- Select 1 Column Layout
- Search for Watchlist
- Click on Add Widget

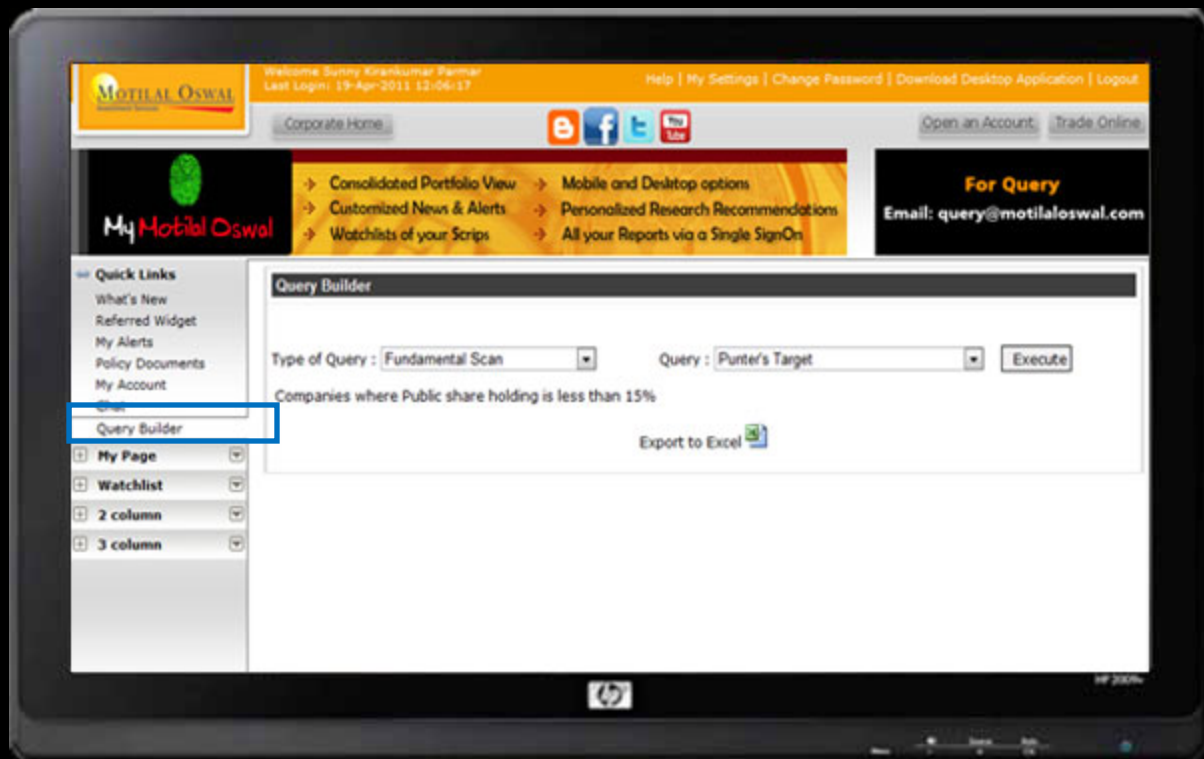
To Add Scrip/Scheme/Commodity

- Click on Add scrip
- Enter the Scrip/Scheme/Commodity Name
- Click on Save
- Click on Return

To Edit Columns in your Watchlist

- Click on Edit
- Select the columns you want to see on your watchlist
- Click on Save

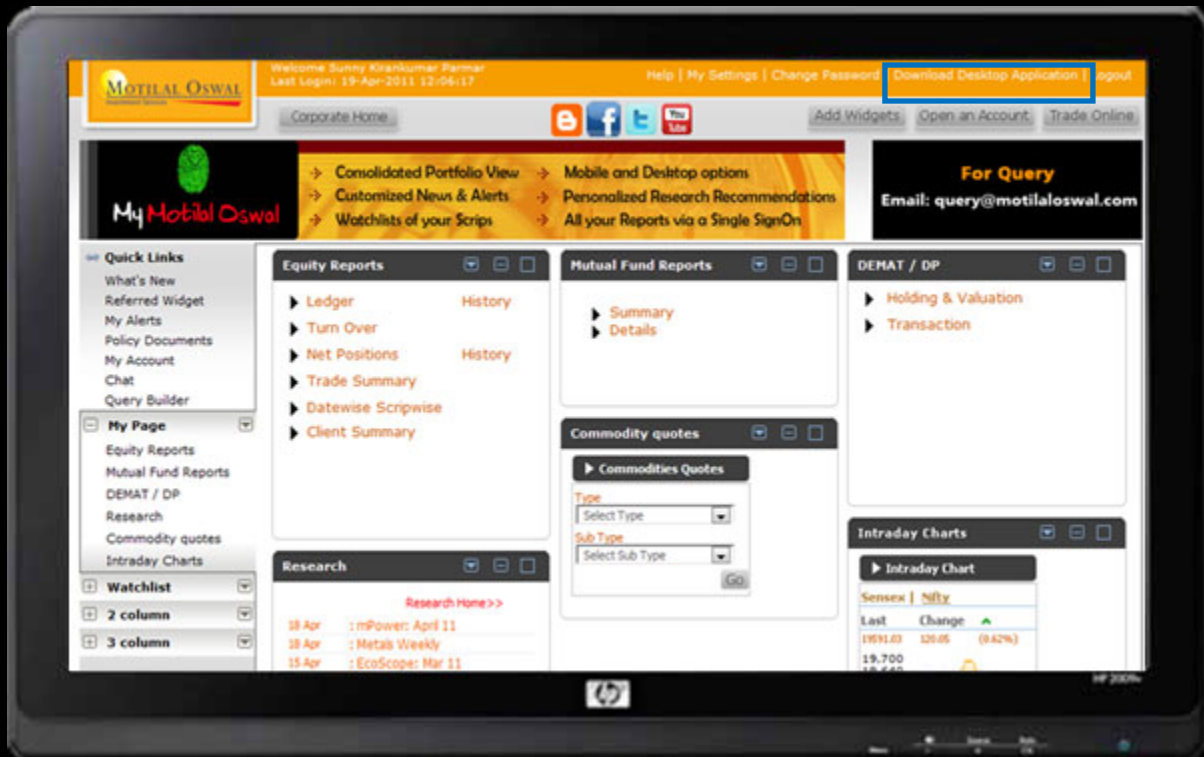
Query Builder



Query Builder – My **Motilal Oswal** Query Builder helps filter the listed stocks on specific queries. Eg. Display all stocks that have given dividend of more than 15% in the last 5 yrs.

- Click on Query Builder in Quicklink Select the query and Say Go

Desktop



Desktop Application – Add My **Motilal Oswal** Desktop application and get market information directly on your desktop without visiting the website.

- Download My Motilal Oswal Desktop Application on your desktop Install
- Login with your credentials
- Access all you're My Motilal Oswal widgets on your desktop
- To add new or edit existing widgets visit the website



Chat



Chat – With Chat users get a chance to talk to experts based on the chat scheduled

- Click on chat option in the Quicklink
- Select the chat from the schedule
- Set Reminder against it
- On the Scheduled date and time users can chat with the expert in the Live Tab

To view Chat Archive

- Click on chat Archive Tab
- Select the chat based on the date or Title
- To save the Chat Archive click on PDF option

Wealth Management Software (WMS)



Wealth Manager Software (WMS) is exclusively meant for MOSL PCG Customers. Users can track their MOSL as well as non MOSL portfolio with the help of WMS. WMS gives users the flexibility to track their investments across all asset classes i.e. Equity, Debt, Private Equity, Mutual funds, Property, etc hence it is called Wealth Manager. WMS is one of the most unique Portfolio Tracking software across the industry. MOSL Portfolio is automatically updated whereas the Non MOSL Portfolio has to be manually updated by users.

Kindly follow the following steps to add WMS widget

- WMS is a 2 column widget
- If you don't have a tab with 2 column layout kindly add a New 2 column layout Tab
- Click on Add Widget
- Search for WMS
- Click on Add

**MOSL Customers can Contact their branch or write to query@motilaloswal.com
Kindly mention your UCID in the Email**