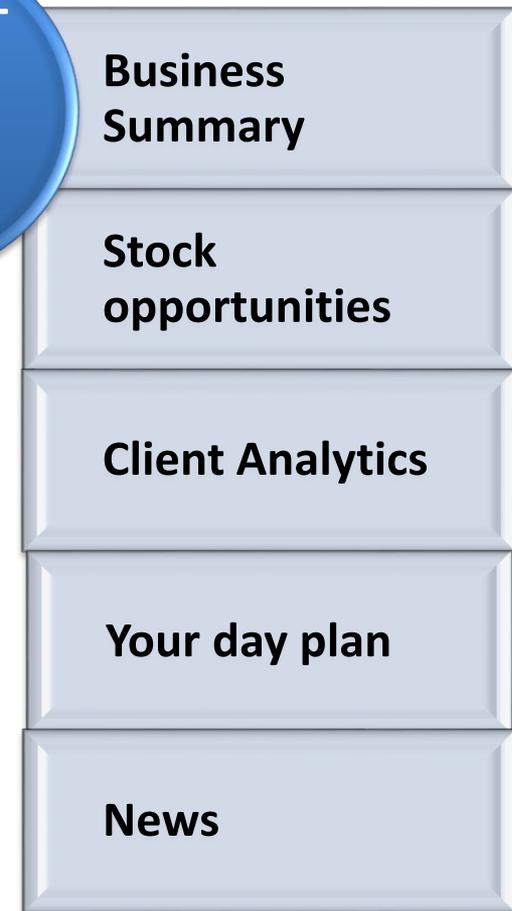




# ADVISORY DASHBOARD

# What is Advisory Dashboard?

- It is a single window of information about every key real time data point on all your mapped clients.
- Unique platform that helps advisors to scale up their day-to-day productivity.
- A tool designed to plan a advisors day more systematically
- Ensures in depth analysis of clients trading pattern and provides proactive notifications to manage your business.



## Key Benefits:

Monitors the productivity of the Advisor.

Creates cross-selling opportunities.

Engage with multiple clients at the same time

# Steps to get started



**Login**

Login Id: T0102815

Password: [ ]

PAN / DOB (dd/mm/yyyy): [ ]

Login Cancel [Forgot Password](#) [Password Policy](#) [Disclaimer](#)

Welcome to Trading Work Station

MOTrader Version:- 1.9.5 IP 172.16.81.121 Mac E4:42:A6:74:04:EB

← Login into your Terminal

Click on Start Button



Select Advisory Dashboard

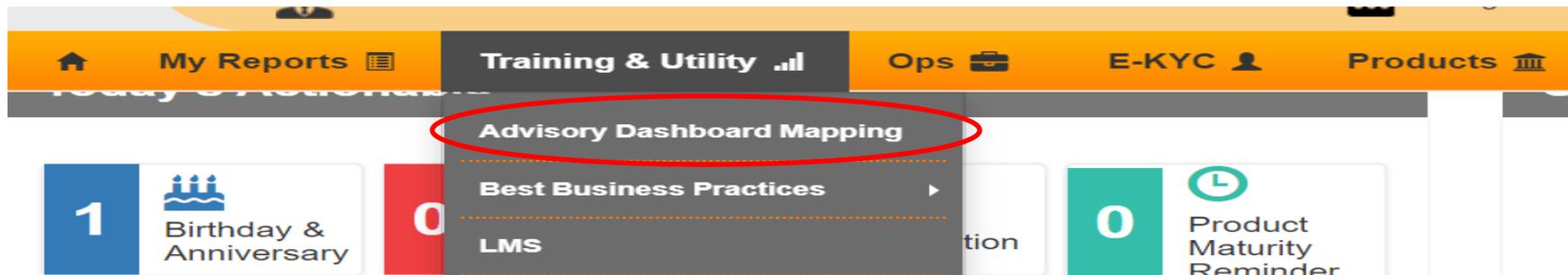
# Advisory Dashboard Mapping process



Step 1: Click on **Partner Login/ Uppermost** -> insert Login Id & Password



Step 2: Go to **Training & Utility** -> **Advisory dashboard Mapping**



# Advisory Dashboard Mapping process

## Step 3: Clear All Mapping → Download Excel Format

### Advisory Dashboard Client Mapping

Show Brokerage

\*On selecting this option, dealer will be able to view client brokerage in client wise search

No file chosen

you can tick or un-tick the "Show Brokerage tab"

If you have done mapping before click on "Clear All Mapping" for uploading new clients

Download the Excel format for mapping

## Step 4: Enter Client code against Terminal Id in Excel format → Select the Excel format on your computer → upload excel format

	A	B
1	Terminalid	Clientid
2		
3		
4		
5		
6		
7		
8		
9		

If you already have old clients mapped and want to map new clients as well, then add old + new clients in new Excel format and upload the complete list in 1 file

### Note:

- Do not make any changes in format/font size
- If mapping file is uploaded before **6.00 PM**, then you will be able to view your clients in Dashboard on the next day.
- **Brokerage Show/Hide Option:** In case BA wants to hide or show the brokerage details on the dashboard then you can tick or un-tick the "Show Brokerage" tab Brokerage you will be able to view the brokerage details on Advisory dashboard.

# Advisory Dashboard Home Page



MOTILAL OSWAL

Clientwise
FR24738

### Client Summary

Mapped 225

NCR	OCR	PCR
180	45	0

Traded 5 Today

NCR	OCR	PCR
4	1	0

### Business Summary

Turnover 4,882,673  
2,162,507 (79%)

TradeCount 75  
-66 (-48%)

F & O	Delivery	Intraday	Commodity	Currency
2,317,042	218,193	2,347,438	0	0
2,317,042 (100%)	-693,218 (-76%)	538,683 (29%)	0 (0%)	0 (0%)

### Investment Product

Clients Invested	Mutual Funds	2,646,661
36	SIP	74,880
AUM	PMS	0
2,721,541	Others	0

Mutual Funds

Clients Invested	Total AUM	Gross Sales
29	2,646,661	2,339,707

### Client Analytics

Top Revenue Clients | Top Degrowth Clients | Clients Not Traded | Top Loss Clients | Top Profit Clients | P/L Summary | Top Traded Scrip

Client Code	Total Brokerage	Equity	FNO	Commodity	Currency
NAGVRJ02	1,322	1,322	0	0	0
NAGVRR28	422	422	0	0	0
NAGJ069	250	250	0	0	0
NAGVRB11	195	195	0	0	0
NAGVRI01	194	0	194	0	0

### Your Day Plan

8:30 to 9:30 | 9:00 to 9:30 | 9:30 to 11:30 | 11:30 to 2:00 | 2:00 to 3:30 | 3:30 to 5:00

Margin Shortfall | Payin Short

Client Code	Shortfall Amount
NAGATM505	-265,723.42
NAGVRR28	-236,360.41
NAGM181	-200,889.33
NAGVRR29	-65,712.47

### Stock Opportunities

Client Code : NAGVRC03 1 BUY

ONGC

Recommendation  
RECOMMENDATION- MOST SMART - CASH - NA - RECOPRICE:128.125;  
TARGET:139; STOP LOSS:123.00; DEC 27 2019 10:45AM

Available Margin

Client Code : NAGVRC04 1 BUY

ONGC

Recommendation  
RECOMMENDATION- MOST SMART - CASH - NA - RECOPRICE:128.125;  
TARGET:139; STOP LOSS:123.00; DEC 27 2019 10:45AM

Available Margin

Client Code : NAGVRC12 1 BUY

ONGC

Recommendation  
RECOMMENDATION- MOST SMART - CASH - NA - RECOPRICE:128.125;  
TARGET:139; STOP LOSS:123.00; DEC 27 2019 10:45AM

Available Margin

# 1. Business Summary



An overall business snapshot for advisors to track and monitor their productivity.

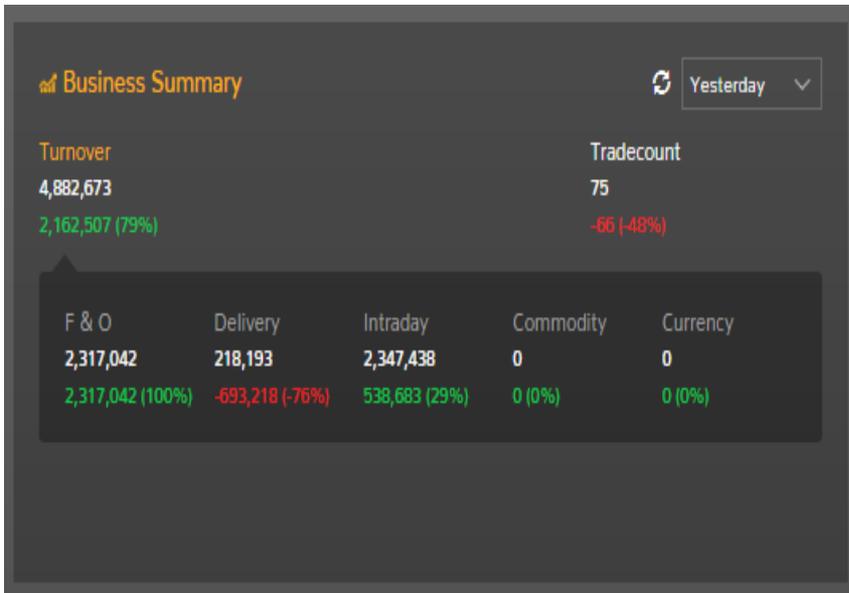
## Key Benefits:

Helps in tracking the periodic target with detailed information.

segment-wise summary with a provision to view for a range of time-period.

Real time summary of the revenue generated across all segments.

You can even view a split of **online** and **offline** Turnover, Brokerage, Trade count and the segments just by hovering the cursor over them.

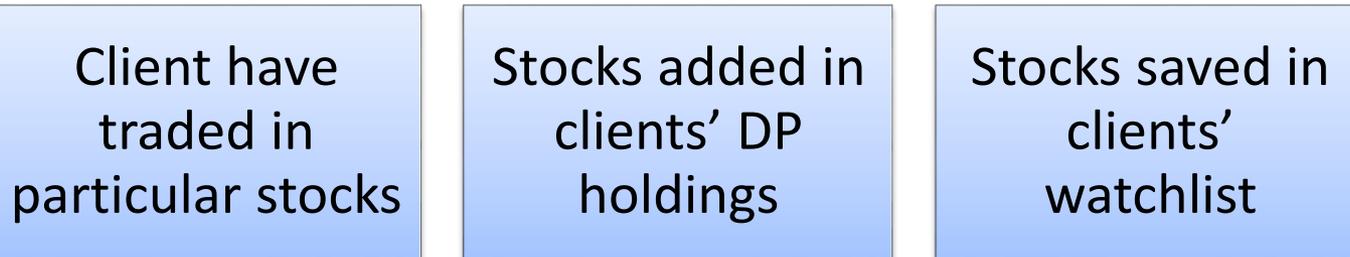


## 2. Stock opportunities

**Stock opportunities consists of customized recommendations for every clients based on their past trading behaviour and categorization (Trader, Positional, Investor)**

Stock Opportunities <span style="float: right;">Closed Calls</span>		
<b>Client Code :</b> DL8469 <span style="color: orange;">1</span> <span style="border: 1px solid green; padding: 2px;">BUY</span> HINDPETRO  <b>Recommendation</b> RECOMMENDATION- SHORT TERM POSITIONAL (PCG) - CASH - NA - RECOPRICE:311.8; TARGET:331; STOP LOSS:303.00; OCT 15 2019 9:17AM  <b>Available Margin</b> 0	<b>Client Code :</b> DL3557 <span style="color: orange;">1</span> <span style="border: 1px solid green; padding: 2px;">BUY</span> RELIANCE  <b>Recommendation</b> RECOMMENDATION- INSTI TECHNICAL - CASH - NA - RECOPRICE:1289.35; TARGET:1450; STOP LOSS:1220.00; SEP 24 2019 1:45PM  <b>Available Margin</b> 0	<b>Client Code :</b> DL8623 <span style="color: orange;">1</span> <span style="border: 1px solid green; padding: 2px;">BUY</span> RELIANCE  <b>Recommendation</b> RECOMMENDATION- INSTI TECHNICAL - CASH - NA - RECOPRICE:1289.35; TARGET:1450; STOP LOSS:1220.00; SEP 24 2019 1:45PM  <b>Available Margin</b> 0

**Parameters that generates Stock opportunities for Clients active for last 3 month's period:**



### **Benefits:**

Customized call for every clients.

Calls are based on client categorization (Trader, Positional, Investor)

Probability of conversion is higher

# 3. Client Analytics



A complete statistics of clients based on various indicators that will help advisors to target right set of clients and increase their share of business.

Client Analytics Yesterday

Top Revenue Clients | Top Degrowth Clients | Clients Not Traded | Top Loss Clients | Top Profit Clients | P/L Summary | Top Traded Scrip

Client Code	Total Brokerage	Equity	FNO	Commodity	Currency
LKO0625	633	0	0	633	0
PZ5614	473	473	0	0	0
E368441	465	465	0	0	0
E330075	266	266	0	0	0
E519293	162	162	0	0	0

## 1. Top Revenue Clients

- This data shows all clients who generated highest revenue.
- This can be viewed segment-wise for desired period.
- **Benefits:** Cross-selling can be done to these clients.

## 2. Top Degrowth Clients

- List of clients whose revenue(brokerage) has dropped.
- It shows degrowth in clients revenue in last two trading sessions.
- **Benefits:** Help to increase your reach and active ratio

# Client Analytics(cont.)

## 3. Client Not Traded

- Shows the list of mapped clients who have not traded.
- This list is bifurcated based on their profile.
- **Benefits:** opportunity to re-activate your clients

## 4. Top Loss Clients

- Shows the list of clients who have made loss under MOFSL and Non-MOFSL stocks.
- **Benefits:** If the loss is due to investment in Non-MOFSL stock, recommend the client to invest more in MOFSL stock

## 5. Top Profit Clients

- Shows the list of clients who have made profit under Covered and Uncovered stocks.
- **Benefits:** Opportunity to take referrals from these set of clients and even cross-selling opportunity.

## 6. P/L Summary

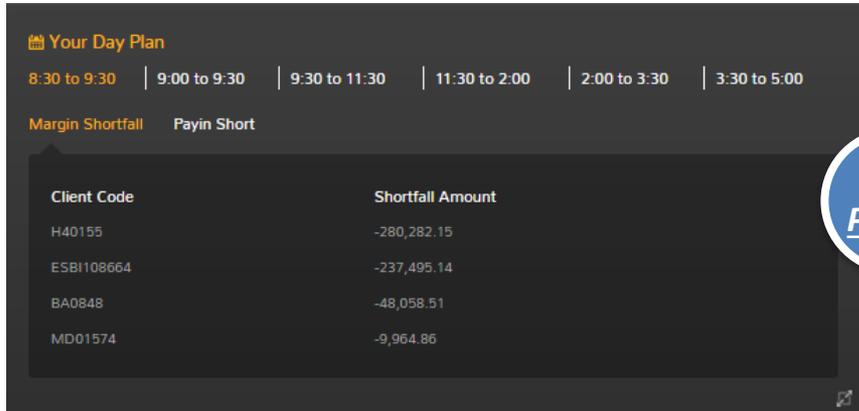
- It Shows the segment-wise P/L Summary of the clients for the current financial year.
- **Benefits:** Based on the ledger balance, new investment products can be pitched to clients

## 7. Top Traded Scrip

- It shows the list of top traded scrips tab gives you the list of scrips which are most traded by the clients mapped to the advisor, along with turnover, trade count, contract name, segment, brokerage detail.

# 4. Your day plan

A To-Do list for advisors to plan their day in a systematic manner



**Your Day Plan**

8:30 to 9:30 | 9:00 to 9:30 | 9:30 to 11:30 | 11:30 to 2:00 | 2:00 to 3:30 | 3:30 to 5:00

Margin Shortfall Payin Short

Client Code	Shortfall Amount
H40155	-280,282.15
ESBI108664	-237,495.14
BA0848	-48,058.51
MD01574	-9,964.86

**Key Points**

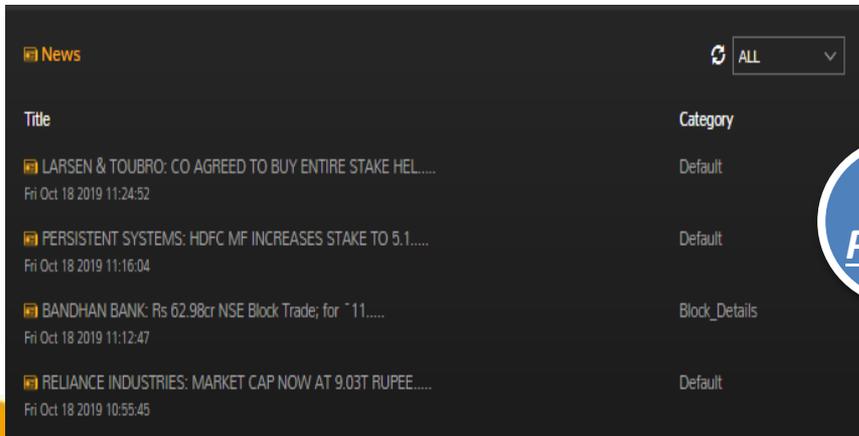
Your Day Plan is a systematic plan designed for advisors to prioritize his tasks on hourly basis during the day.

This section ensures that the advisors focuses on both active & inactive clients

The time range will be from 8:30am to 5:00pm.

# 5. News

This section shows the industries fastest & real time news to keep your clients updated.



**News** [Refresh] ALL [Dropdown]

Title	Category
LARSEN & TOUBRO: CO AGREED TO BUY ENTIRE STAKE HEL..... Fri Oct 18 2019 11:24:52	Default
PERSISTENT SYSTEMS: HDFC MF INCREASES STAKE TO 5.1..... Fri Oct 18 2019 11:16:04	Default
BANDHAN BANK: Rs 62.98cr NSE Block Trade; for ~11..... Fri Oct 18 2019 11:12:47	Block_Details
RELIANCE INDUSTRIES: MARKET CAP NOW AT 9.03T RUPEE..... Fri Oct 18 2019 10:55:45	Default

**Key Points**

The news are categorized according to different asset classes & global events.

Creates opportunity for Advisors to update clients through latest news.

# 6. From the research desk

## Stock recommendation from MOFSL Research team



From the research desk

EQUITY CASH TRADING

Scrip	Reco Price	Reco Date	Target Price	Stop Loss	Call Type	Status
Avenue Super-EQ 1949.15	BUY 1845.20	15-Oct	1959.95	18 Oct 2019	Short Term Positional (PCG)	Closed
Bharti Airtel-EQ 383.35	BUY 388.95	15-Oct	413.00	376.00	Short Term Positional (PCG)	Active
HPC L-EQ 317.90	BUY 311.80	15-Oct	331.00	303.00	Short Term Positional (PCG)	Active

**Key Points**

This section provides MOFSL research recommendation as per client category and segments.

The stocks can be filtered as per different segments.

Stock are updated on real time basis that helps advisors to recommend them to the clients.

# 7. Advisory product summary

Advisors can find the clients who have invested in ACE / TIP / Me-Gold along with detailed investment information.

Advisory Product Summary

Ace Products	Clients Invested 4	AUM 1,493,165	
TGS	Clients Subscribed 8	Subscription Revenue 205192	
TIP	Clients Invested 0	AUM 0	SIP Count 0
Me Gold	Clients Invested 32	AUM 0	Gold (Gm) 119.73

**Key Points**

Single view of product-wise summary for all the advisory products offered by MOFSL.

Tracks the clients subscribed to these products along with their current portfolio value.

# Quick Links

Few Quick links to instantly provide additional required information on mapped clients. This section has shortcut links to various functionalities. On clicking the link, a pop up will display the functionality features.

## Quick Links

Client Categorization

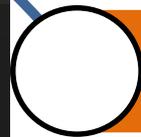
Portfolio Confirmation **1**

Research Report

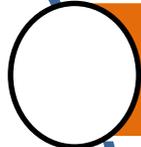
Uncovered DP

RMS Selling

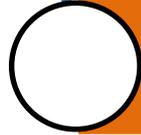
Ageing Debit



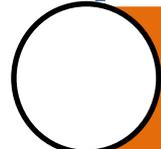
**Client Categorization** – This will help advisor to classify the client's profile if he is a Trader, Positional trader or Investor.



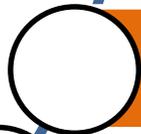
**Portfolio Confirmation** – If any ACE orders confirmation is pending for the day then, advisor can click on this link to confirm the orders on behalf of clients by taking an OTP



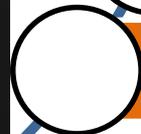
**Research Report** - MOFSL research reports will be displayed in descending order of publication date. There will be a search option available on top, to search any research report.



**Uncovered DP** – List of stocks under MOFSL research coverage and non MOFSL research will be displayed along with AUM Advisor can also view the client wise details of total stocks and AUM



**RMS Selling** – Clients falling under RMS selling will be displayed here.



**Ageing Debit** - Any ageing debit raised by RMS team will be displayed here.

# Client Summary

Client Summary shows the complete summary of the mapped clients



**Client Summary**

Mapped 155

NCR	OCR	PCR
42	36	77

Traded 11  Today 

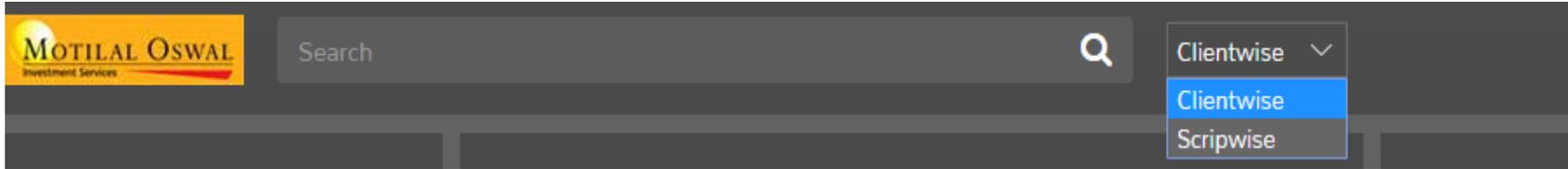
NCR	OCR	PCR
6	1	4

The screenshot shows a dark-themed dashboard. At the top, there's a header 'Client Summary' with a person icon. Below it, 'Mapped 155' is displayed. A table shows counts for NCR (42), OCR (36), and PCR (77). Below this, 'Traded 11' is shown with a refresh icon and a dropdown menu set to 'Today'. A second table shows counts for NCR (6), OCR (1), and PCR (4).

In the client summary you can view the following details :

- Total clients mapped
- Client category NCR, PCR and OCR
- Traded clients
- Option to select the desired period

# Search Bar



Two types of search options are available:

1. **Client-wise:** In this option team leader gets complete information of an Individual client.
2. **Scrip-wise:** Search a particular scrip and get the entire details of the company.

**All you needs to do is to follow the below steps :**

Go to drop down-> enter client code /scrip in the search bar-> Select client code/ Scrip from sub list-> click on search icon.

# Smart Notifications



You can quickly view a notification and perform available actions from the notification popup windows.

The screenshot displays the Motilal Oswal dashboard with several key sections:

- Client Summary:** Mapped 128 clients. NCR: 20, OCR: 65, PCR: 43. Traded 11 clients today. NCR: 1, OCR: 9, PCR: 1.
- Business Summary:** Turnover: 30,660,294 (-207,924 (-1%)). Brokerage: 0 (0%). Tradecount: 56 (5 (10%)).
- Investment Product:** Donut chart showing distribution of investment products. Clients Invested: 50, AUM: 79888850.09.
- Client Analytics:** Grid of charts for Client Code H09382 and Margin 494749.35.
- Your Day Plan:** Schedule for 8:30 to 9:30, 9:00 to 9:30, and 9:30 to 10:00.
- Margin Shortfall:** Client Code H40155.

A notification popup is highlighted in red, containing two messages:

- Covered/Uncovered DP:** H40438 has 92.00% of holding valuation not covered under MOSL Research along with 70 more clients, to know more details go to day plan 11:30-2:00->Uncovered DP.
- Margin Shortfall:** H40155 has margin shortfall of Rs. 7387109.2298/- along with 41 more clients, to know more details go to day plan 8:30 - 9:30->Margin Shortfall.

- It does an in-depth research of your client trading and behaviour pattern to provide proactive smart notification to manage your business.
- Advisors will get RMS Selling, Ageing debits, Pay-in Shortage, Margin shortfall, Intraday Short, and many more notifications to quickly assist them to manage their business

**Thank You**