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.

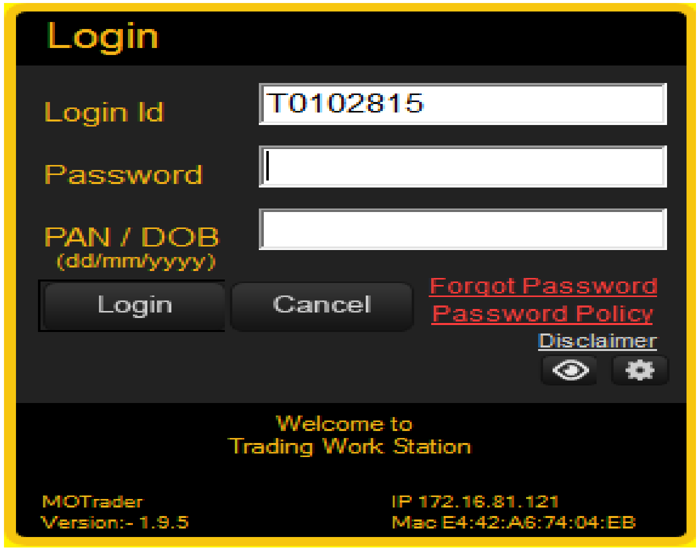
5 MUST USE Features

- **Business Summary**
- **Stock opportunities**
- **Client Analytics**
- **Your day plan**
- **News**

Key Benefits:

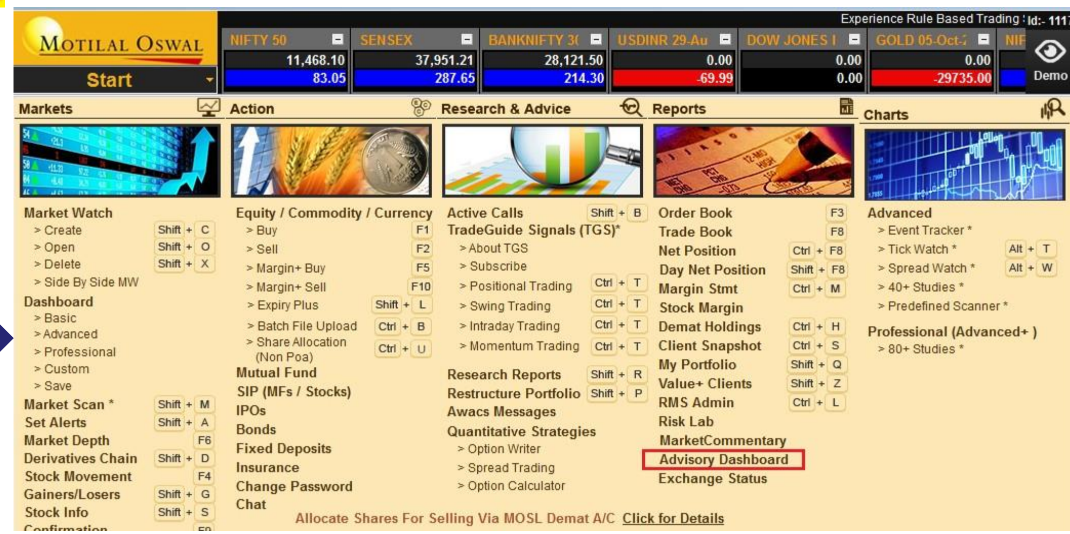
- Monitors the productivity of the Advisor.
- Creates cross-selling opportunities.
- Engage with multiple clients at the same time

Steps to get started



Login into your Terminal

Click on Start Button

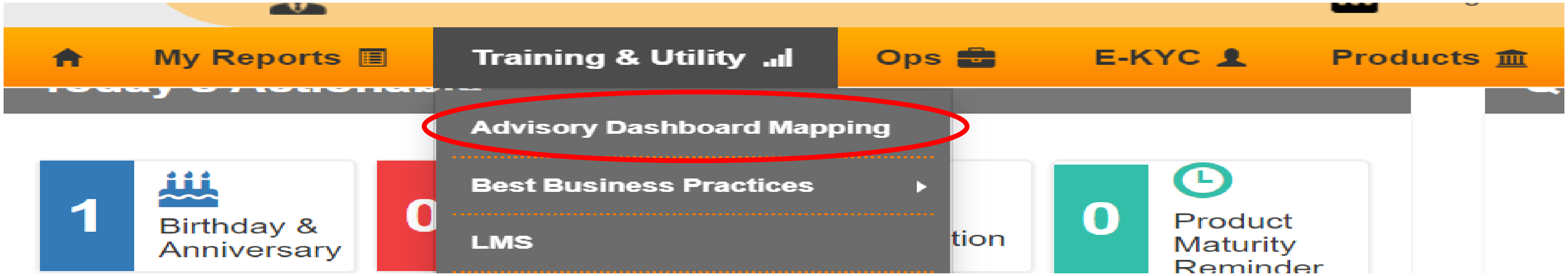


Select Advisory Dashboard

Advisory Dashboard Mapping process

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

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

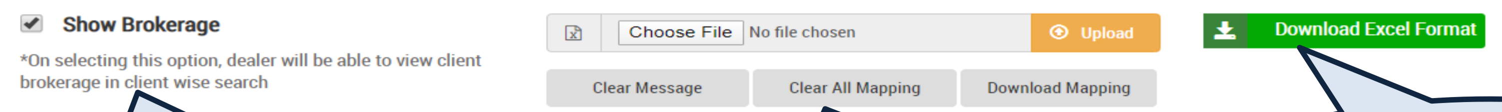


Advisory Dashboard Mapping process

Motilal Oswal
Solid research. Solid advice.

Step 3: Clear All Mapping → Download Excel Format

Advisory Dashboard Client Mapping



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

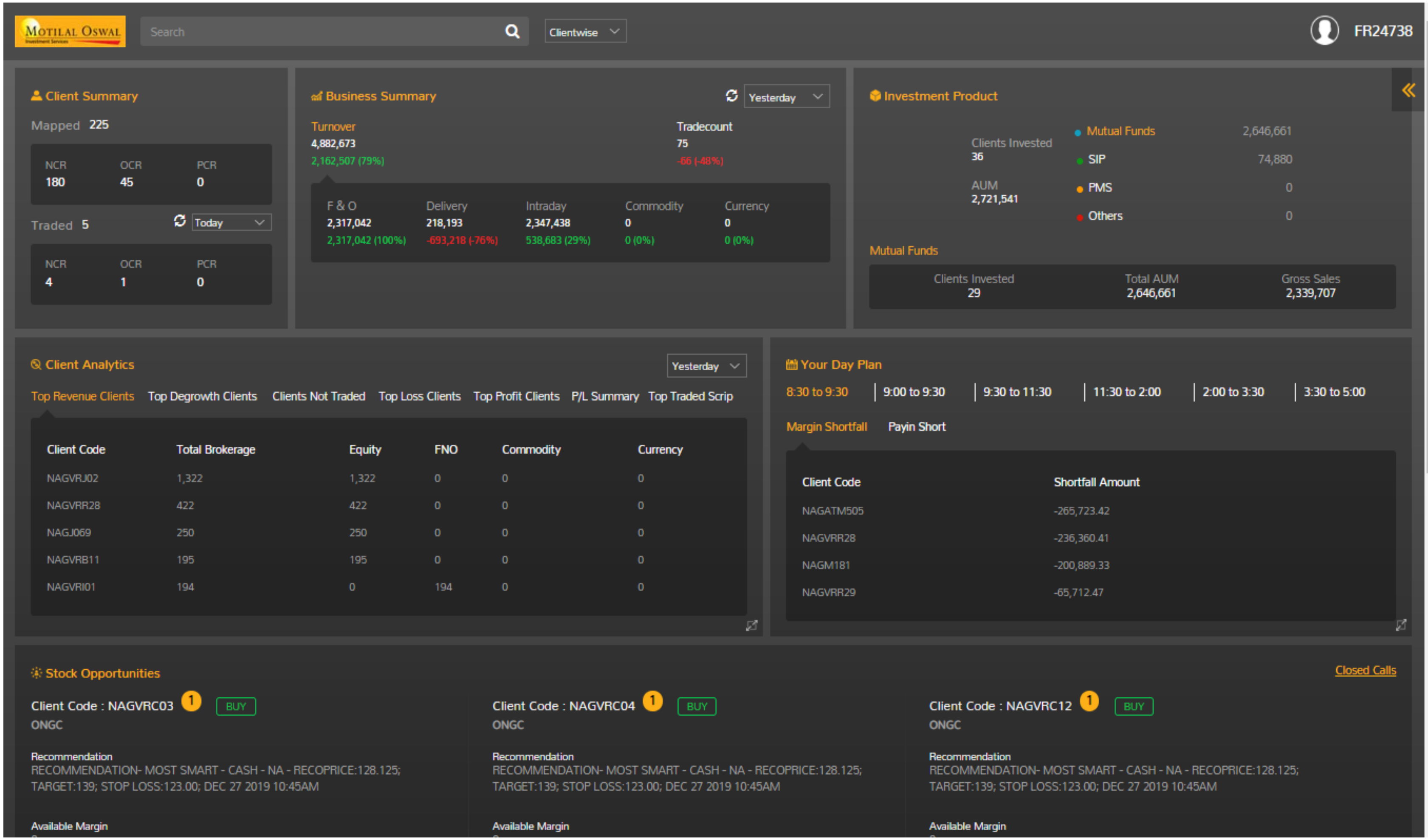
	A	B
1	TerminalId	ClientId
2		
3		
4		
5		
6		
7		
8		
9		

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:

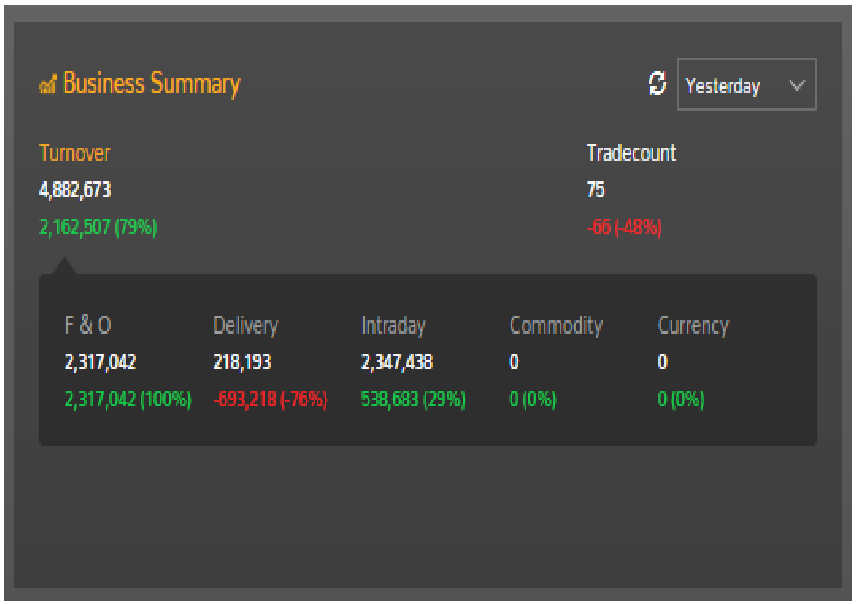
- Do not make any changes in format/font size
- If mapping file is uploaded before **6.00 PM**, then you will be able to view your clients in Dashboard on the next day.
- **Brokerage Show/Hide Option:** In case BA wants to hide or show the brokerage details on the dashboard then you can tick or un-tick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

Advisory Dashboard Home Page



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.

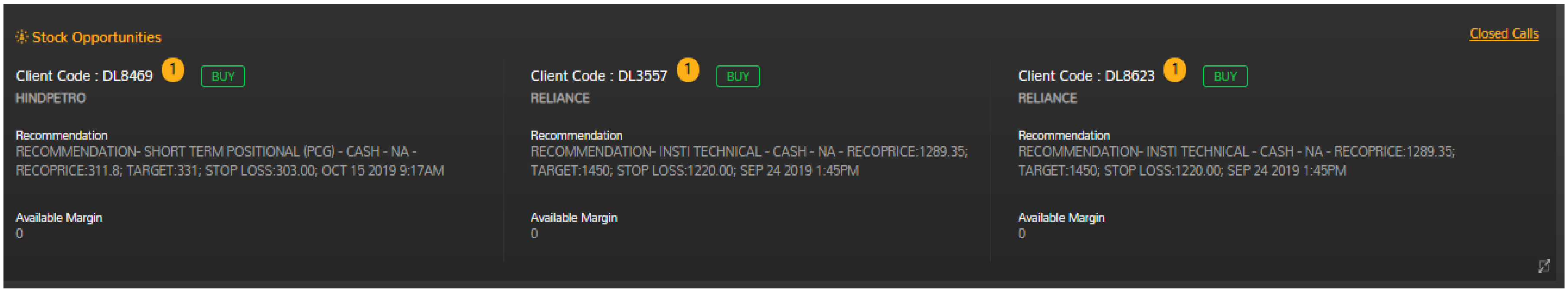
segment-wise summary with a provision to view for a range of time-period.

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)



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

- Client have traded in particular stocks
- Stocks added in clients' DP holdings
- Stocks saved in clients' watchlist

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

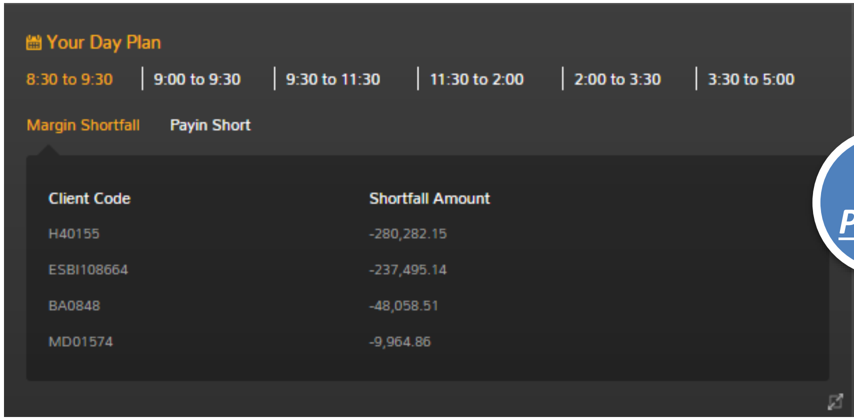
- It Shows the segment-wise P/L Summary of the clients for the current financial year.
- ***Benefits:*** Based on the ledger balance, new investment products can be pitched to clients

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



Key Points

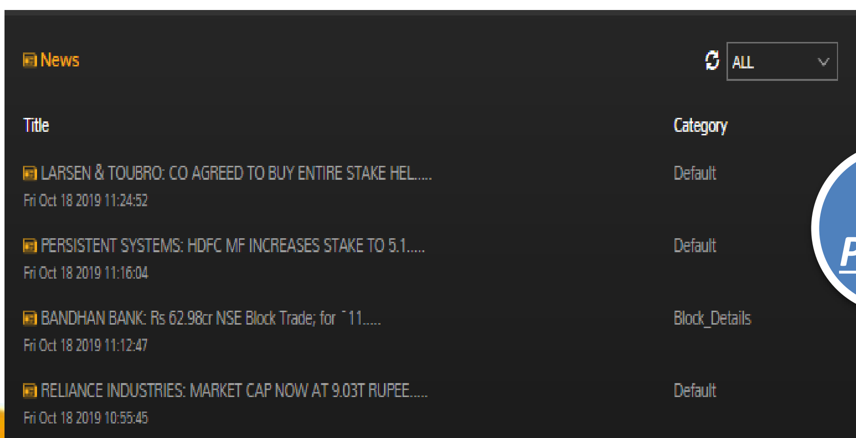
Your Day Plan is a systematic plan designed for advisors to prioritize his tasks on hourly basis during the day.

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.



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
HPCL-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

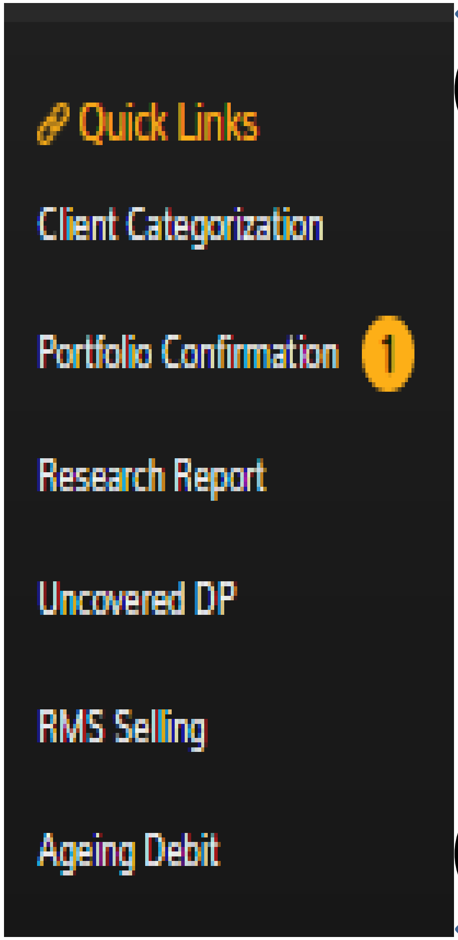
Key Points

Single view of product-wise summary for al 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.



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.

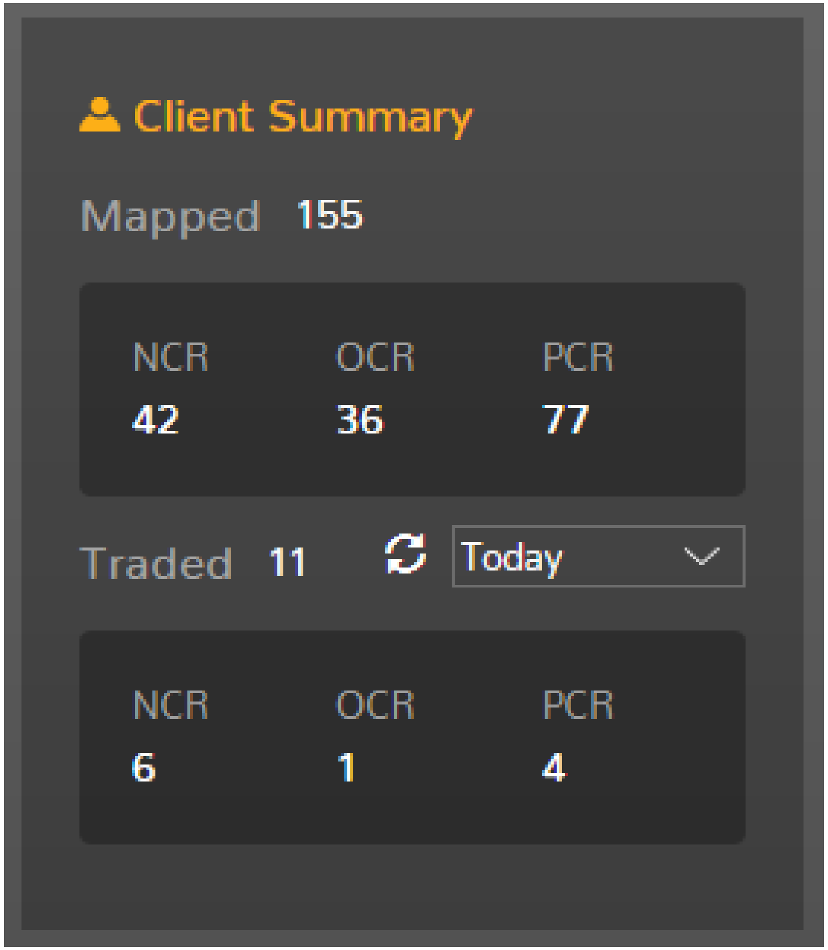
Uncovered DP – List of stocks under MOFSL research coverage and non MOFSL research will be displayed along with AUM Advisor can also view the client wise details of total stocks and AUM

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



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.

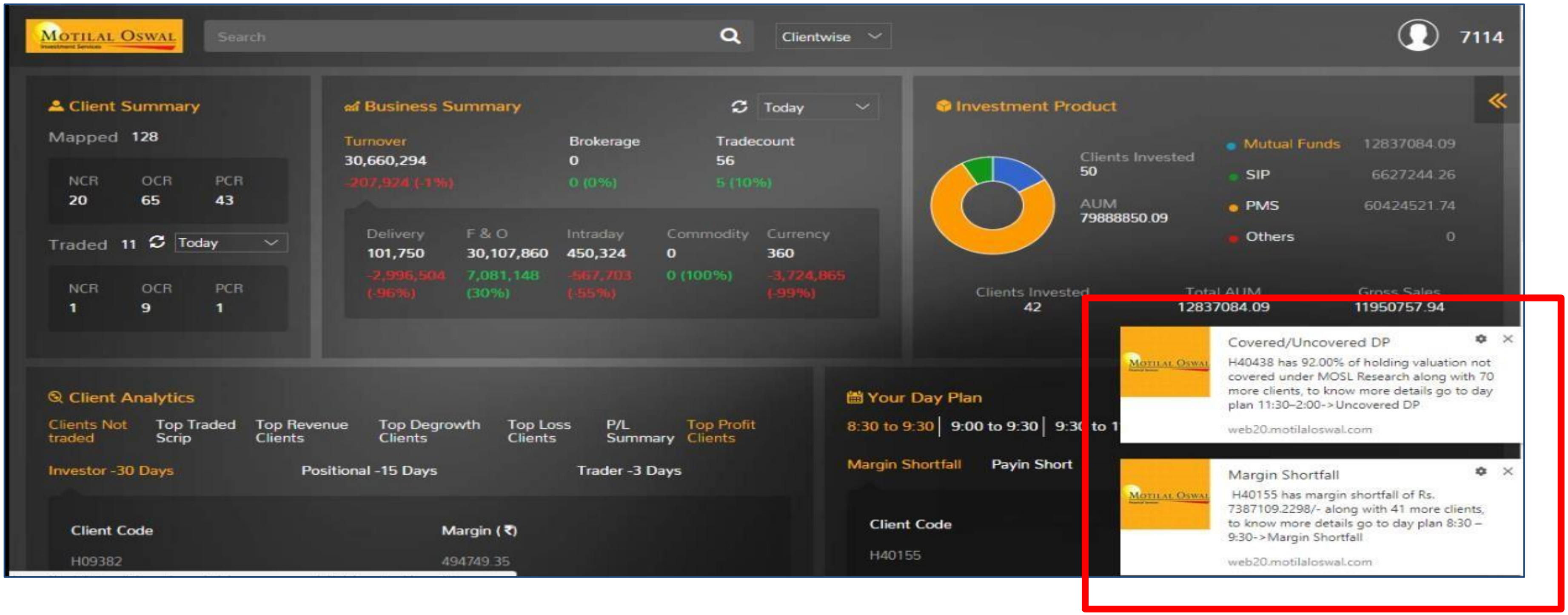
All you needs to do is to follow the below steps :

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

MOTILAL OSWAL
Solid research. Solid advice.

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



- 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