

Suggest Me Tool

A solution for every client's need!

About Suggest Me Tool



- Designed exclusively to address basic needs of an investor
- An AI powered solution which suggests right product mix for your clients based on their needs
- Recommendations presented in personalized report which can be used in your client interactions
- Suggest me solves the 5 common needs a customer has

The 5 Common Needs



- 1) I want 10% annual returns, tell me what to do
- 2) I want higher returns versus my investments in FD's or Gold
- 3) I have cash, tell me where to invest
- 4) Show me complete product offering to choose from
- 5) My portfolio is not performing, how do I improve it

Benefits of Suggest Me

- Instant portfolio generation
- Flexibility to alter portfolio mix as per your preferences
- Research backed product recommendations
- Option to compare performances across products

Suggest Me tool – Web Screen

Pick a need, let's help you to fulfill it



Have a Return in Mind

Tell us your desired rate of return, we'll help you achieve it



Earn More

FDs, Bonds, Index - You choose the product, we'll help you outperform



Suggest Me

Get a personalised investment portfolio which suits your investment style



Readymade Solutions

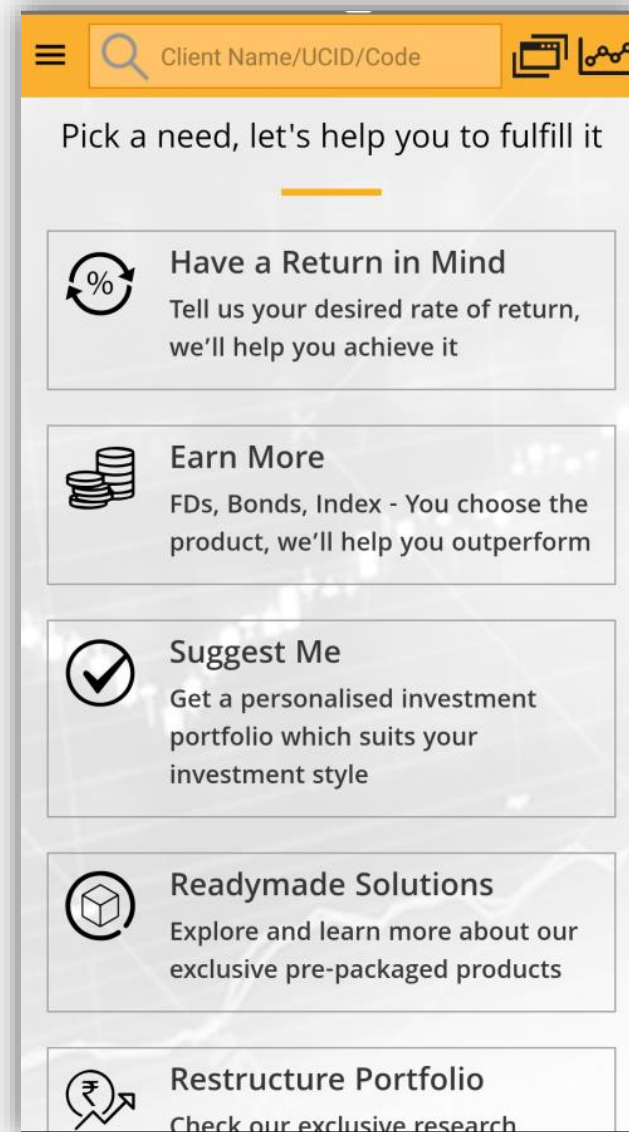
Explore and learn more about our exclusive pre-packaged products



Restructure Portfolio

Check our exclusive research insights on your portfolio to become financially fit

Suggest Me tool – Mobile Screen



Solution to first 3 needs

- 1) I want 10% annual returns, tell me where to invest?
- 2) I want higher returns vs. my investments in FD's or Gold
- 3) I have available cash, tell me where to invest?

Answer a few questions

How familiar are you with investments in equities?



I am a beginner



I only have a basic understanding of the market



I understand the pros and cons of investing in equities



I am an experienced investor/trader

Back

You want to earn more returns than?



Fixed Deposits (Approx. FD returns 7% p.a)



Bonds (Approx. Bond returns 10% p.a)



Index (Approx. Index returns 18% p.a)

Back

Start Again

What kind of annualized returns are you expecting?



Upto 10%



Upto 20%



More than 20%

Back

Start Again


Suggested Recommendations

You can **edit** your Investment amount, time horizon as well as risk profile


[Start Again](#)

Hi PARAMJEET SINGH, your chosen investment amount is ₹ 20,00,000 and time horizon is 39 months


We identify you as a **Balanced** Investor. You can also change your profile by clicking on one of the below options.

 **Aggressive**

You like to have growth assets in your portfolio and are comfortable to accept its risks. Security of capital is secondary to you in pursuit of high investment returns

 **Balanced**

You are aware of risks that stock markets carry. You are willing to take short term risk for long term capital appreciation

 **Conservative**

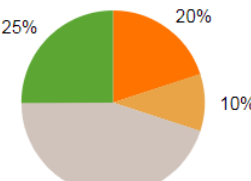
You prefer to have a safety first approach. You would prefer to invest major section of your investment in fixed income securities, and the remaining in stock market

Recommended Investment Portfolio


[Edit Portfolio](#)

Asset Class : **Equity** | Allocation : **45.00%** | Value : **₹ 9,00,000**

Product Allocation



Pre-Packaged Products

ACE FundTech 

Past Returns: 3 Yrs Returns: 44.8% vs. BSE 500: 10.85%

ACE FundTech invests in the cash market based on deep rooted fundamentals. It invests in companies with the best financial trends subject to thresholds of quality & valuation while also considering technical parameter... [K...](#)
[more](#)

Mutual Fund - Equity

You can **add/remove** products from suggested portfolio.

Suggested Recommendations

You can **change** allocation of products

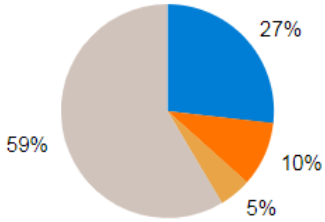
Recommended Investment Portfolio

You can now add / edit products or investment value and save the changes

+ Add Product | Save Now

Asset Class : **Equity** | Allocation : **36.59%** | Value : ₹ **7,50,000**


Product Allocation



- ACE Cash
- Mutual Fund - Equity
- Me-Gold
- Credit Opportunities

Compare Product Performance

Pre-Packaged Products

ACE Cash 
 Past Returns: 3 Years Returns: 28.5% vs. Nifty 50: 11.06%
 Investment Amount: ₹ **5,50,000**
 ACE-Cash aims to deliver superior returns by recommending an exclusive basket of growth oriented stocks. The focused portfolio has an optimal asset allocation mix with the perfect combination of large cap and mi... [Know more](#)

Mutual Fund - Equity

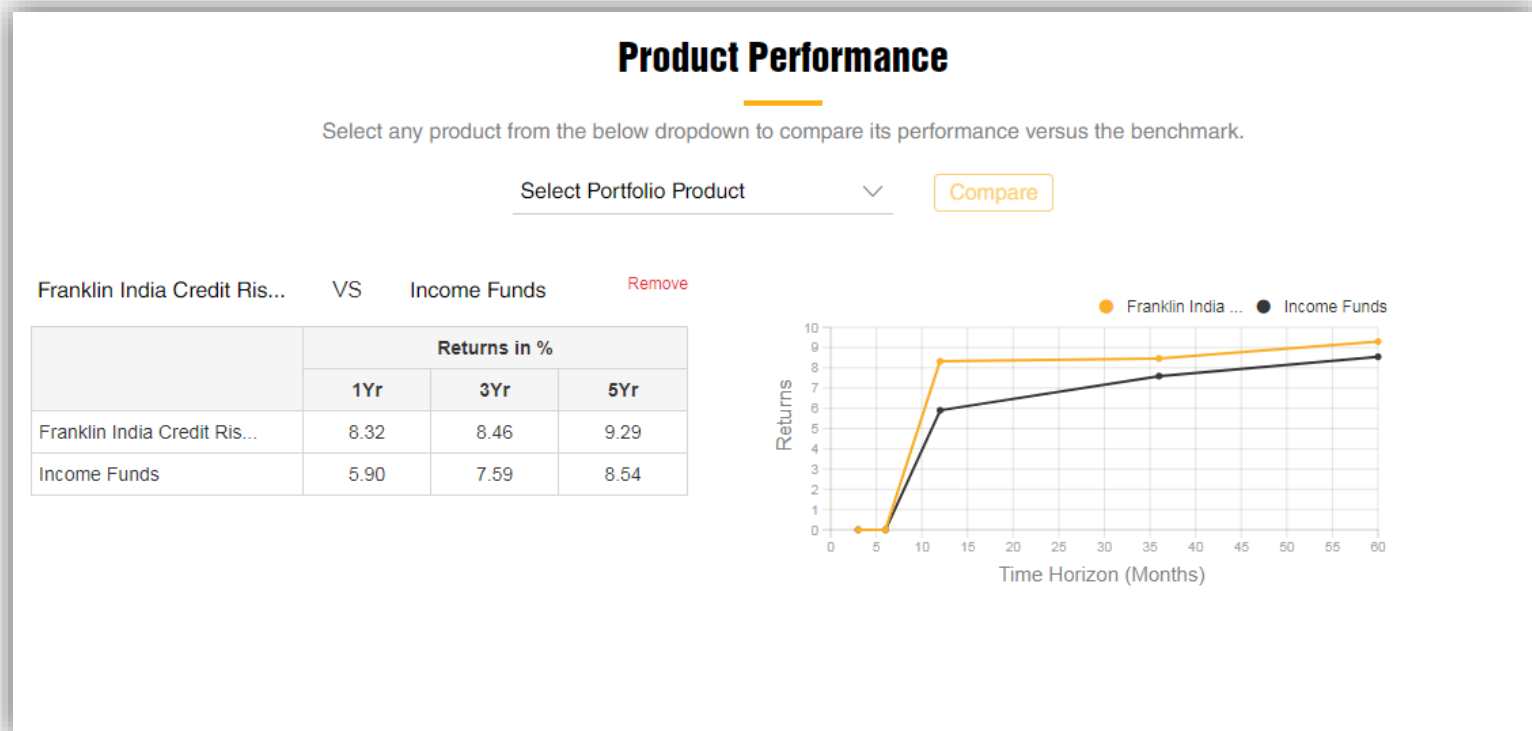
Sundaram Midcap - Regular - Growth
 Past Returns: 3 Years Returns: 9.43% vs. Equity - Diversified: 9.93%
 Investment Amount: ₹ **66,666**
 Sundaram Midcap - Regular - Growth endeavors to provide potential for high growth and returns with moderate risk by investing majority of their portfolio in equity shares. Equity schemes allow you to benefit from stock ... [Know more](#)

Franklin India Prima Fund-Growth
 Past Returns: 3 Years Returns: 10.64% vs. Equity - Diversified: 9.93%
 Investment Amount: ₹ **66,667**
 Franklin India Prima Fund-Growth endeavors to provide potential for high growth and returns with moderate risk by investing majority of their portfolio in equity shares. Equity schemes allow you to benefit from stock ma... [Know more](#)

You can **compare** product performance

Suggested Recommendations

Product Performance: Compare product performances against benchmark and other products



Mobile View

Recommended Products

Hi DHARMIK PATEL,

Your chosen investment amount and time horizon is

₹ 35,00,000 and 4 Months

We find you as **Conservative** [Change](#)

Conservative - You prefer to have a safety first approach. You would prefer to invest major section of your investment in fixed income securities, and the remaining in stock market

[Start Again](#)

Recommended Investment Portfolio

[Edit Portfolio](#)

Asset Class :	Allocation :	Value :
Debt	100.00%	₹ 35,00,000

Liquid

ICICI Prudential Liquid Fund - Growth

You can **edit** your Investment amount, time horizon as well as risk profile

You can **add/remove** products from suggested portfolio.

You can **change** allocation of products

7.59%

Investment Amount

₹ 18,00,000

HDFC Credit Risk Debt Fund

Past Returns:
3 Years Returns: 7.59% vs. Short Term Income Funds: 7.56%

Investment Amount

₹ 18,00,000

Current Ledger Balance : ₹ 0

Investment Amount : ₹ 67,50,000

Deficit Balance : ₹ 67,50,000

[Compare Performance](#)
[+ Add Product](#)

Save Now

Cancel

Mobile View

Compare Product Performance

3 Years Returns: 6.46% vs. Income Funds: 7.59%

Investment Amount
₹ **18,00,000**

✕ **HDFC Credit Risk Debt Fund**

Past Returns:
3 Years Returns: 7.59% vs. Short Term Income Funds: 7.56%

Investment Amount
₹ **18,00,000**

Current Ledger Balance :
Investment Amount : ₹ 18,00,000
Deficit Balance : ₹ 67,50,000

⇌ Compare Performance + Add Product

Save Now **Cancel**

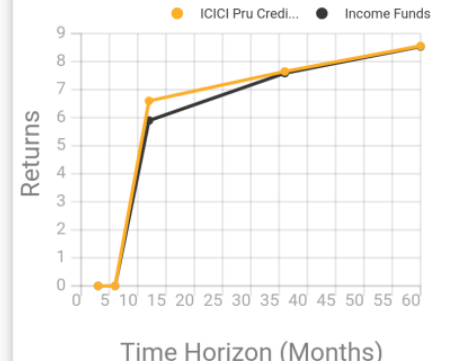
You can **compare** product performance

Product Performance

Select any product from the below dropdown to compare its performance versus the benchmark.

Select Portfolio P ▼ **Compare**

ICICI Pru Credit R...	6.60	7.65	8.56
Income Funds	5.90	7.59	8.54



● ICICI Pru Credi... ● Income Funds









Time Horizon (Months)

Download Email

Need 4: Show me complete product offering


Readymade Solutions

Readymade Solutions

-  ACE FundTech ▼
-  ACE Cash ▼
-  ACE Derivatives ▼
-  ACE Smart ▼
-  Robo Wealth ▼
-  Portfolio Management Service ▼
-  Me-Gold ▼
-  Target Investment Plan ▼

Explore our Readymade Solutions.




Availability of product brochures for detailed information

 **ACE FundTech** ▲

ACE FundTech invests in the cash market based on deep rooted fundamentals. It invests in companies with the best financial trends subject to thresholds of quality & valuation while also considering technical parameters. The ideal investment horizon for ACE FundTech is a minimum of 1 year. [Download Brochure](#)

Minimum Investment amount required to invest in ACE FundTech ₹ 2,50,000

Product Features

-  Diversified Portfolio
-  Diligent Stock Picking
-  Round the clock Portfolio Reviews

Need 5: Restructure Portfolio

Restructure Portfolio

Portfolio Summary



Portfolio Insights

- **Holistic asset allocation model** as per your identified risk profile
- **Personalized insights** on what is good and bad on your portfolio
- Opportunity for **lowering risk and increasing return** in each asset class
- **Flexibility** to remove asset class, stocks or schemes
- One click **instant execution** across portfolio
- **Multi language** tool available in English, Hindi, Gujarati and Tamil


Need 5: Restructure Portfolio

Asset wise analytics

Equity Snapshot - Current Portfolio

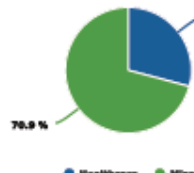
- All of your Equity Investment is in Miscellaneous which is not performing well, giving a return of -12.89%.
- 70.88% of your Equity Investment lies in Finance & Investments which gave you a return of -14.82% and the remaining amount lies in Miscellaneous with a return of -7.81%.

Asset wise Allocation



100.0 %
● Misc

Sector wise Allocation



70.9 % ● Healthcare
29.1 % ● Misc

Top Gainers

None of your stocks have given a positive return!


Top Losers

-14.82% Central Depository Services (India) Ltd
-7.81% Shelby Ltd

Mutual Fund Snapshot - Current Portfolio


- All of your Mutual Fund Investment is in Equity which is not performing well, giving a return of -0.44%.
- 73.81% of your Mutual Fund Investment lies in Equity: Multi Cap which gave you a return of -0.44%.
- Equity: Large Cap with a return of -2.07%.

Asset wise Allocation



73.0 % ● Equity: Large Cap
27.0 % ● Equity: Multi Cap

Product wise Allocation



100.0 % ● Equity

Top Gainers

2.87% Franklin India Equity-g Equity

Top Losers

-4.22% Aditya Birla SL Focused Equity-g Equity
-2.13% Motilal Oswal Multicap 35 Reg-g Equity
-1.53% Icici Pru Bluechip-g Equity

Our Recommended Portfolio

Proposed Asset Allocation

	Equity	Mutual Funds	PMS	Others	Total
Current	995	0	-	2,001	2,996
Proposed	995	985	-	2,001	3,981

* We are not providing any view on AGR portfolio, Close ended schemes and MCI: stocks as per the current market, and hence we will maintain status quo on them.
* FDs, Bonds, Cash and other asset classes clubbed in Others are not recommended for restructuring.

Equity Allocation

Title	Current	Proposed
Total Value	₹995	₹995
% Allocation	33.21	25.00
No of Stocks	2	2
No of Sectors	2	2

Mutual Fund Allocation

Title	Current	Proposed
Total Value	₹0	₹985
% Allocation	0.00	15.86
No of Schemes	0	1
No of AMC	0	1

Proposed Allocation & Portfolio

Detailed Equity Recommendations

Current Risk: undefined% - Optimized Risk: undefined% Current Return: undefined% - Optimized Return: undefined%

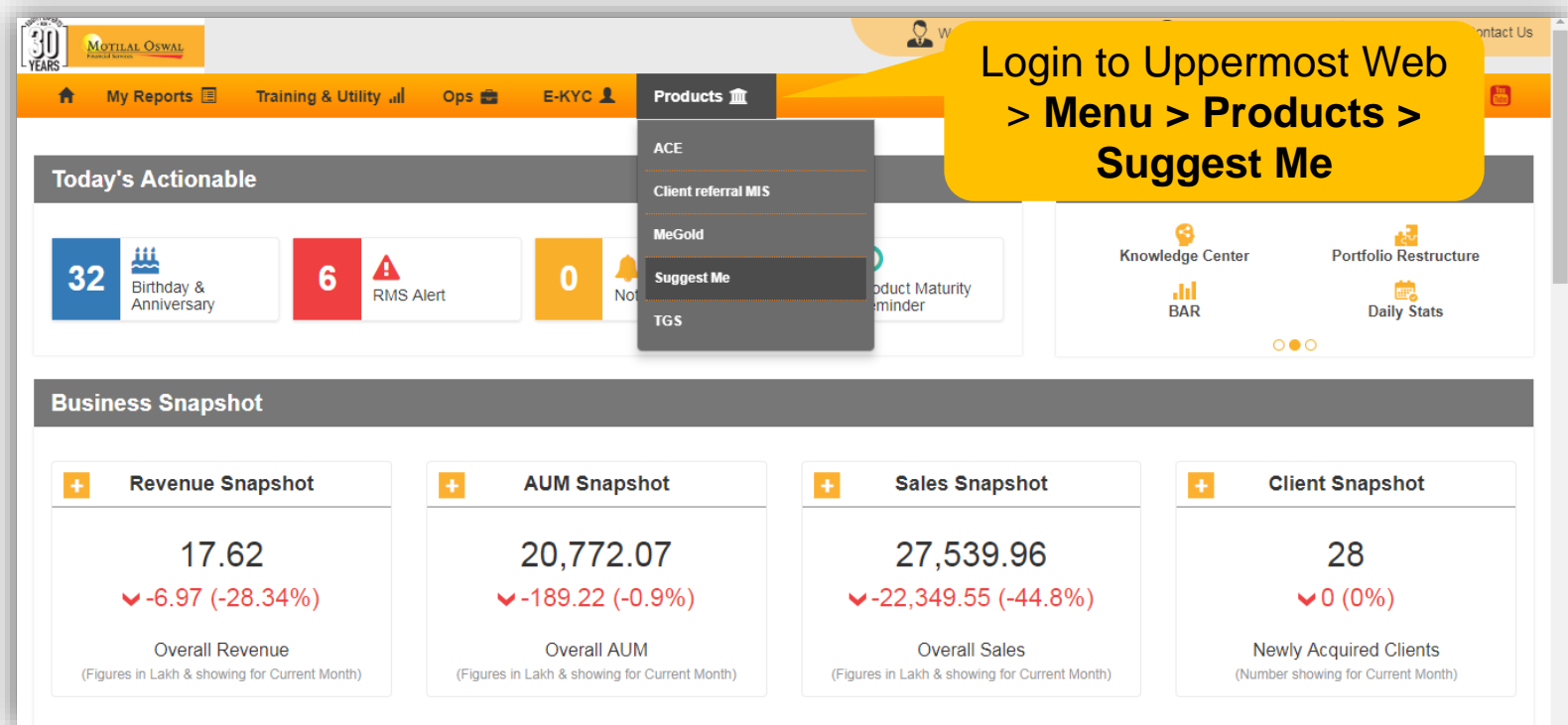
Current Portfolio	Buy More	Hold as is	Add New	Reduce	Sell	Proposed Portfolio
No. of Holdings: 2 Value: ₹ 995	No. of Holdings: 0 Value: ₹ 0	No. of Holdings: 2 Value: ₹ 995	No. of Holdings: 0 Value: ₹ 0	No. of Holdings: 0 Value: ₹ 0	No. of Holdings: 0 Value: ₹ 0	No. of Holdings: 2 Value: ₹ 995
Scrip Name	Holding Qty	Mkt Price Mkt Value	Actionable Qty Actionable Value	Final Qty Final Value	Research Remarks/Rationale	
Shelby Ltd Miscellaneous	2	144.85 290	Hold 0	2 290	This stock is currently Under Review, hence we don't recommend any action	
Central Depository Services (India) Ltd Miscellaneous	3	235.10 705	Hold 0	3 705	This stock is currently Under Review, hence we don't recommend any action	
Total	5	- 995	0 0	5 995		

From where can you access Suggest Me Tool?

1. Uppermost App & Web
2. Advisory Dashboard
3. Saathi App & Web (CRM)
4. Investor App/Web
5. Website/M-site

Uppermost Web

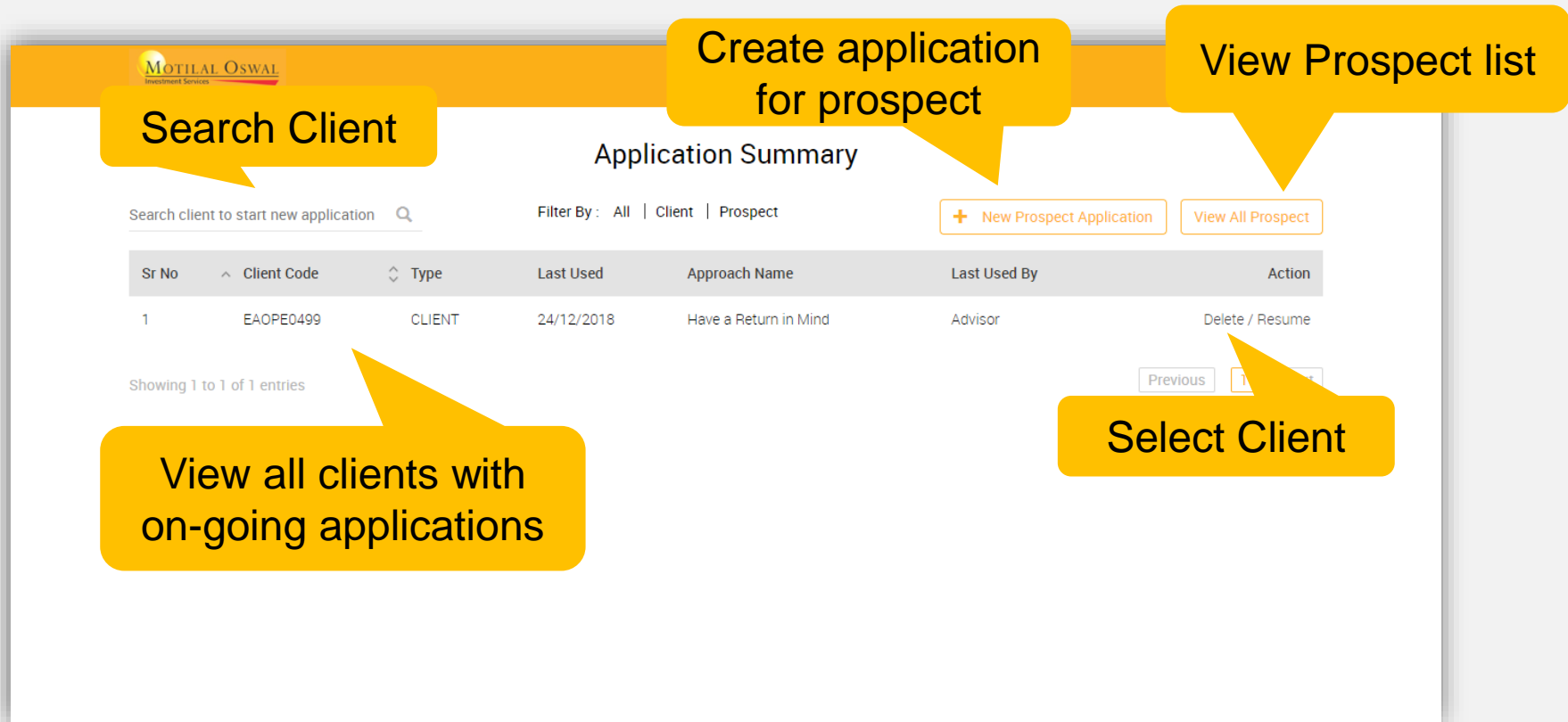
Uppermost Web



The screenshot displays the Uppermost Web dashboard. At the top, there is a navigation bar with a home icon, 'My Reports', 'Training & Utility', 'Ops', 'E-KYC', and 'Products'. A yellow callout box points to the 'Products' menu, which is open, showing options: ACE, Client referral MIS, MeGold, Suggest Me, and TGS. The callout text reads: 'Login to Uppermost Web > Menu > Products > Suggest Me'. Below the navigation bar is a 'Today's Actionable' section with three cards: '32 Birthday & Anniversary', '6 RMS Alert', and '0 Notified'. To the right are 'Knowledge Center', 'Portfolio Restructure', 'BAR', and 'Daily Stats'. The 'Business Snapshot' section contains four cards: 'Revenue Snapshot' (17.62, -6.97 (-28.34%)), 'AUM Snapshot' (20,772.07, -189.22 (-0.9%)), 'Sales Snapshot' (27,539.96, -22,349.55 (-44.8%)), and 'Client Snapshot' (28, 0 (0%)).

Category	Value	Change
Overall Revenue	17.62	-6.97 (-28.34%)
Overall AUM	20,772.07	-189.22 (-0.9%)
Overall Sales	27,539.96	-22,349.55 (-44.8%)
Newly Acquired Clients	28	0 (0%)

Application Summary



The screenshot shows the 'Application Summary' page. At the top left is the 'MOTILAL OSWAL Investment Services' logo. Below it is a search bar with the text 'Search client to start new application' and a magnifying glass icon. To the right of the search bar are filter options: 'Filter By: All | Client | Prospect'. Further right are two buttons: '+ New Prospect Application' and 'View All Prospect'. Below these is a table with the following columns: 'Sr No', 'Client Code', 'Type', 'Last Used', 'Approach Name', 'Last Used By', and 'Action'. The table contains one entry with the following data: Sr No: 1, Client Code: EAOPE0499, Type: CLIENT, Last Used: 24/12/2018, Approach Name: Have a Return in Mind, Last Used By: Advisor, Action: Delete / Resume. Below the table is the text 'Showing 1 to 1 of 1 entries'. At the bottom right of the table area are 'Previous' and 'Next' navigation buttons. Five yellow callout boxes are overlaid on the screenshot: 'Search Client' points to the search bar; 'Create application for prospect' points to the '+ New Prospect Application' button; 'View Prospect list' points to the 'View All Prospect' button; 'View all clients with on-going applications' points to the 'Showing 1 to 1 of 1 entries' text; and 'Select Client' points to the 'Next' navigation button.

Search Client

Create application for prospect

View Prospect list

View all clients with on-going applications

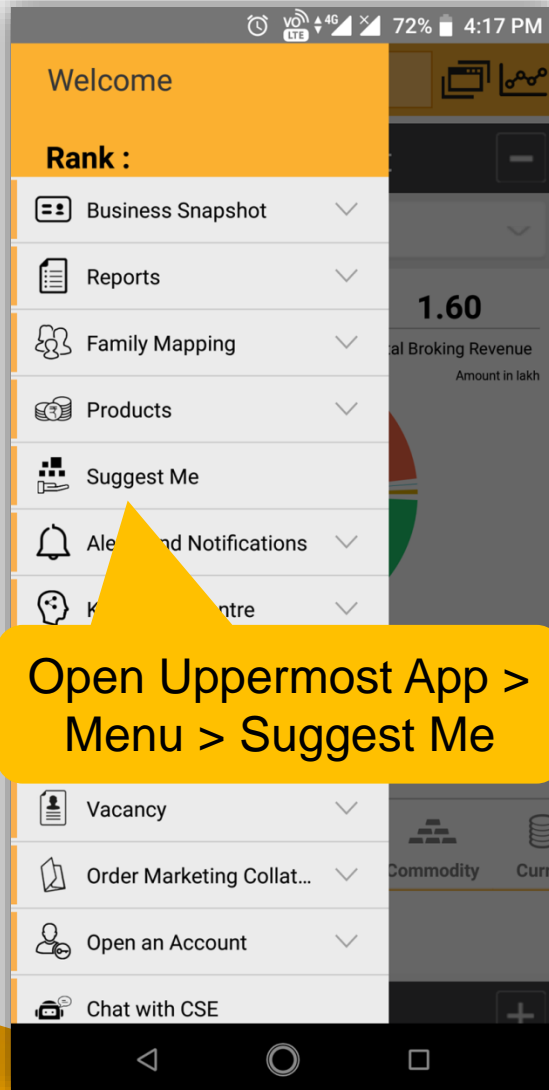
Select Client

Sr No	Client Code	Type	Last Used	Approach Name	Last Used By	Action
1	EAOPE0499	CLIENT	24/12/2018	Have a Return in Mind	Advisor	Delete / Resume

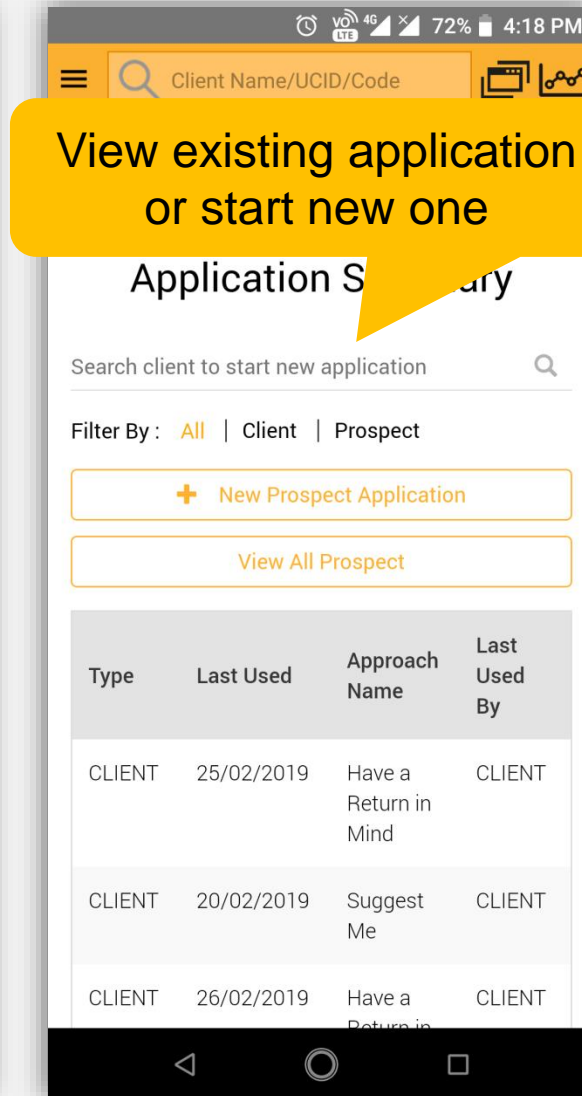
Showing 1 to 1 of 1 entries

Uppermost App

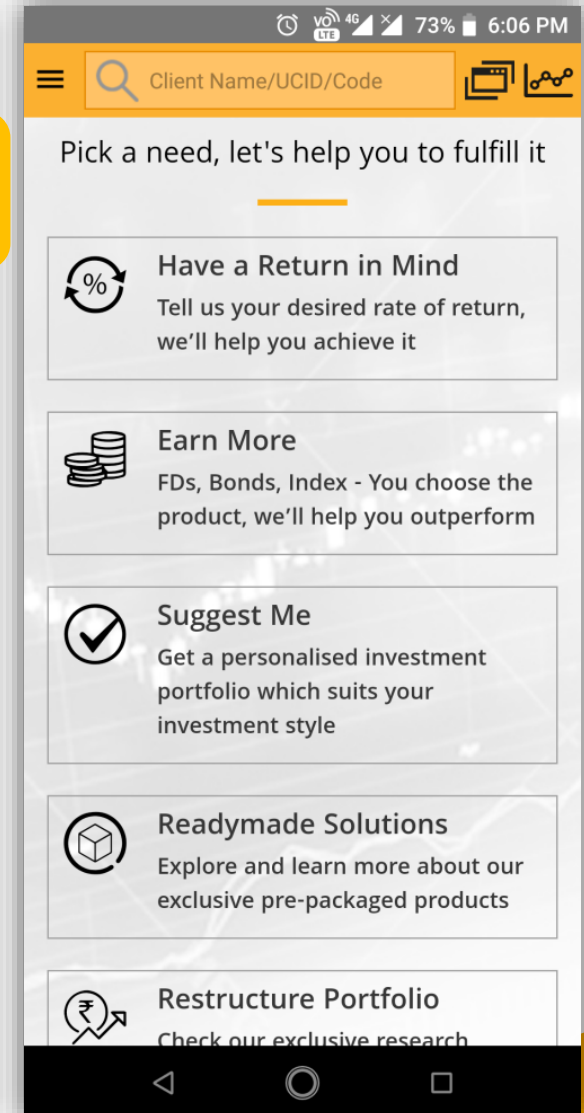
Uppermost App



Open Uppermost App >
Menu > Suggest Me



View existing application
or start new one



Advisory Dashboard

Advisory Dashboard



MO Trader
Experience Rule Based Trading System "TradeGuide Signal" Contact-C Id:- 19302 [1][2-2][No:- 1.9.7][16:19:40]

MOTILAL OSWAL
Start

Markets | **Action** | **Research & Advice** | **Reports** | **Charts**

Market Watch
 > Create (Shift + C)
 > Open (Shift + O)
 > Delete (Shift + X)
 > Side By Side MW

Equity / Commodity / Currency
 > Buy (F1)
 > Sell (F2)
 > Margin+ Buy (F5)
 > Margin+ Sell (F10)
 > Expiry Plus (Shift + L)

Active Calls
TradeGuide Signals (TGS)*
 > About TGS
 > Subscribe
 > Positional Trading (Ctrl + T)
 > Swing Trading

Order Book (F3)
Trade Book (F8)
Net Position (Ctrl + F8)
Day Net Position (Shift + F8)
Margin Stmt (Ctrl + M)
Stock Margin
Demat Holdings (Ctrl + H)
Client Snapshot (Ctrl + S)
My Portfolio (Shift + Q)
Value+ Clients (Shift + Z)
RMS Admin (Ctrl + L)
Risk Lab
Market Commentary
Exchange Status

Advanced
 > Event Tracker *
 > Tick Watch * (Alt + T)
 > Spread Watch * (Alt + W)
 > 40+ Studies *
 > Predefined Scanner *
Professional (Advanced+)
 > 80+ Studies *

Reports
Advisory Dashboard

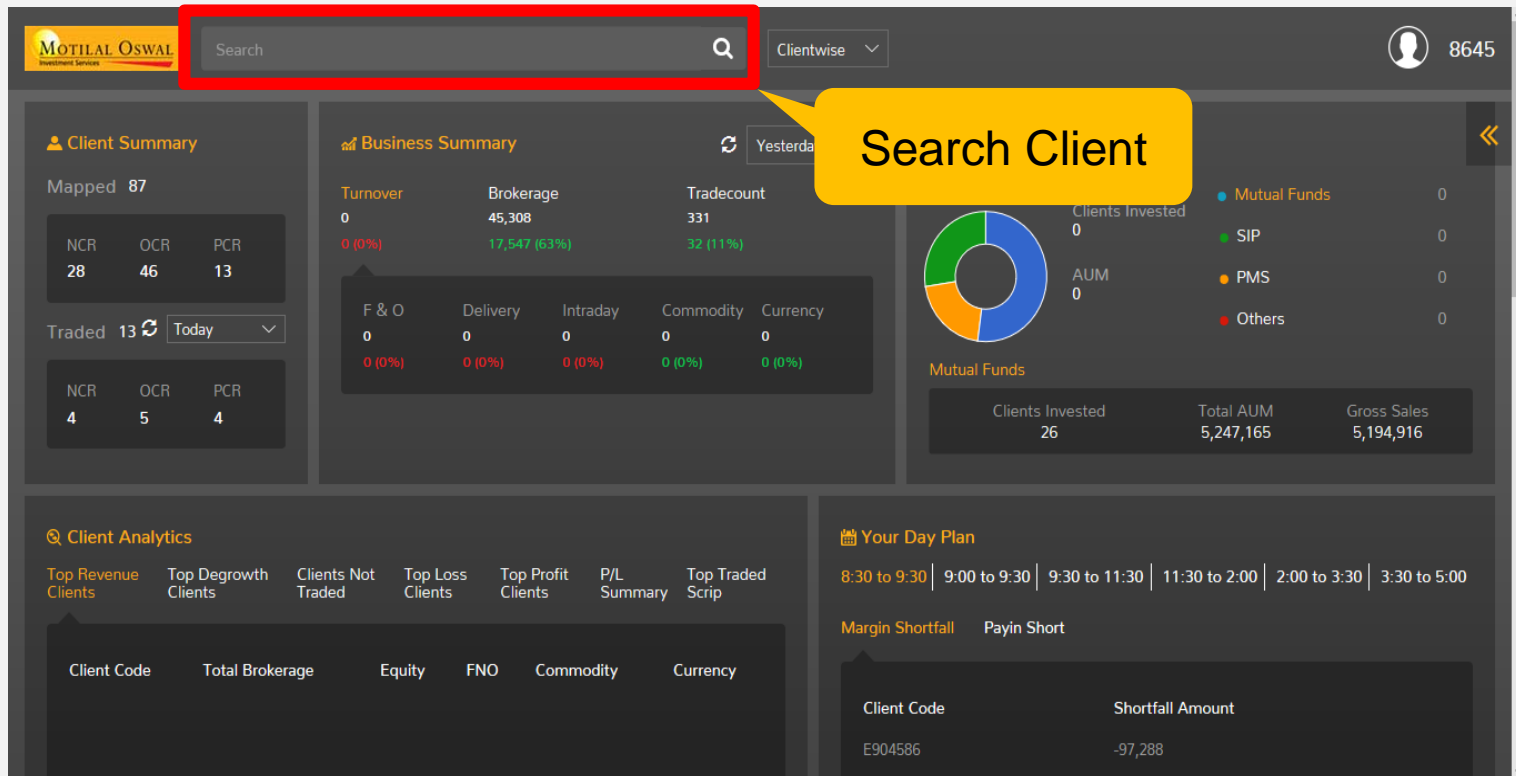
What's New @ Desktop Trading Platform
 Click here to know more about **NEW FEATURES**
 w.e.f. 6th Feb 2016

MOTILAL OSWAL
Investment Services
Solid Research. Solid Advice

NSE BSE MCX NCDEX MCXSX SEBI FAQs Exchange Code

Advisory Dashboard

Advisory Dashboard – Home page

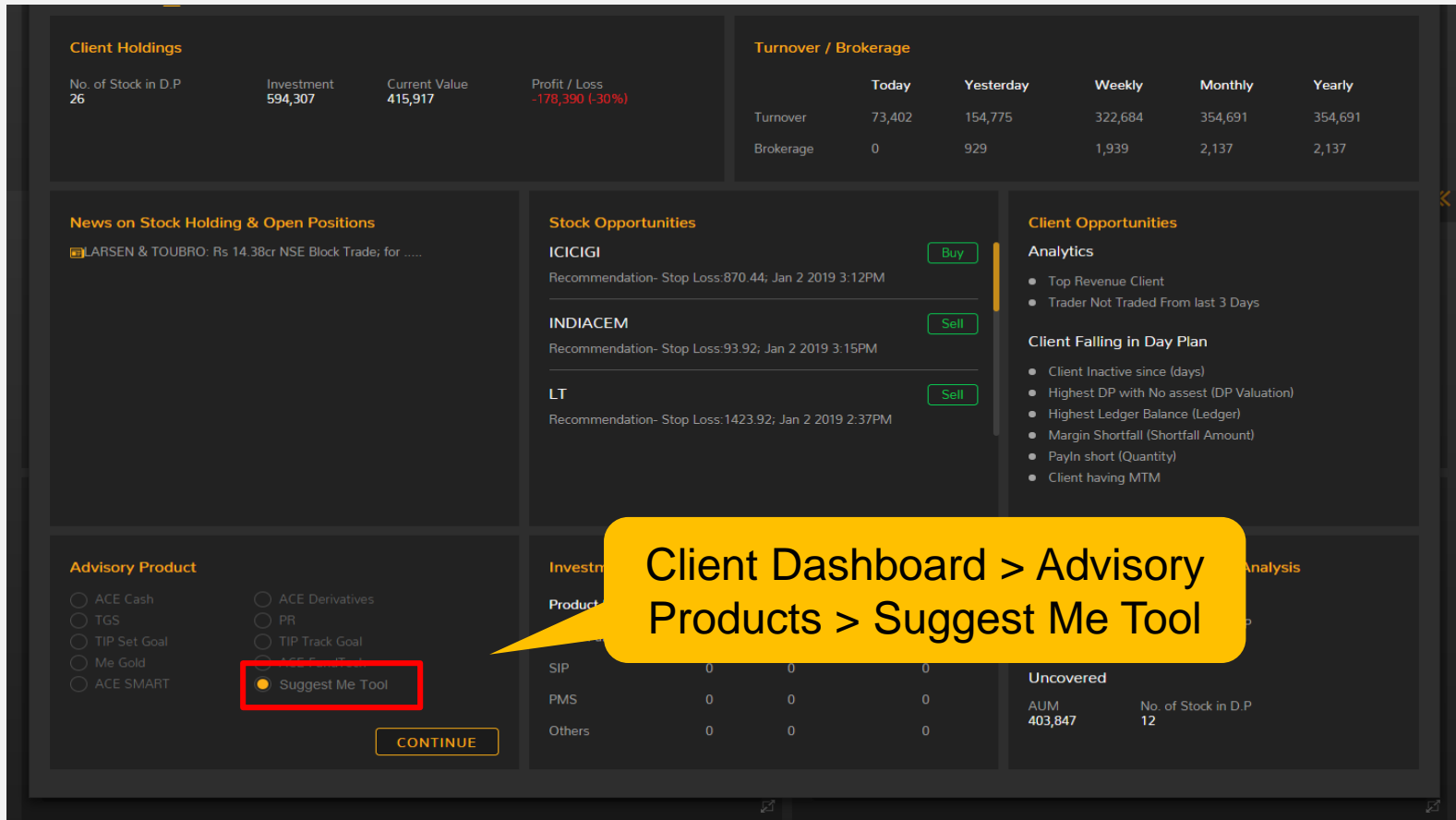


The dashboard features a search bar at the top, highlighted with a red box and labeled "Search Client". Below the search bar, the dashboard is divided into several sections:

- Client Summary:** Shows mapped clients (87) and traded clients (13). It includes tables for NCR, OCR, and PCR metrics.
- Business Summary:** Displays turnover (0), brokerage (45,308), and tradecount (331). It also shows a table for F & O, Delivery, Intraday, Commodity, and Currency.
- Mutual Funds:** A donut chart showing the distribution of investments across Mutual Funds, SIP, PMS, and Others.
- Client Analytics:** A table listing top revenue, degrowth, loss, profit, and traded clients.
- Your Day Plan:** A section for margin shortfall and payin short, with a table showing client codes and shortfall amounts.

Advisory Dashboard

Client Dashboard



The screenshot displays the Client Dashboard interface. The top section includes 'Client Holdings' and 'Turnover / Brokerage' tables. Below these are sections for 'News on Stock Holding & Open Positions', 'Stock Opportunities' (listing ICICIGI, INDIACEM, and LT with buy/sell buttons), and 'Client Opportunities' (including Analytics and Client Falling in Day Plan). The 'Advisory Product' section at the bottom left features a list of products with radio buttons, where 'Suggest Me Tool' is highlighted with a red box and a yellow callout bubble. A 'CONTINUE' button is located below the list.

No. of Stock in D.P	Investment	Current Value	Profit / Loss
26	594,307	415,917	-178,390 (-30%)

	Today	Yesterday	Weekly	Monthly	Yearly
Turnover	73,402	154,775	322,684	354,691	354,691
Brokerage	0	929	1,939	2,137	2,137

Advisory Product

- ACE Cash
- TGS
- TIP Set Goal
- Me Gold
- ACE SMART
- ACE Derivatives
- PR
- TIP Track Goal
- ACE Portfolio
- Suggest Me Tool

Client Dashboard > Advisory Products > Suggest Me Tool

Investment Product

Product	0	0	0
SIP	0	0	0
PMS	0	0	0
Others	0	0	0

Uncovered

AUM	No. of Stock in D.P
403,847	12

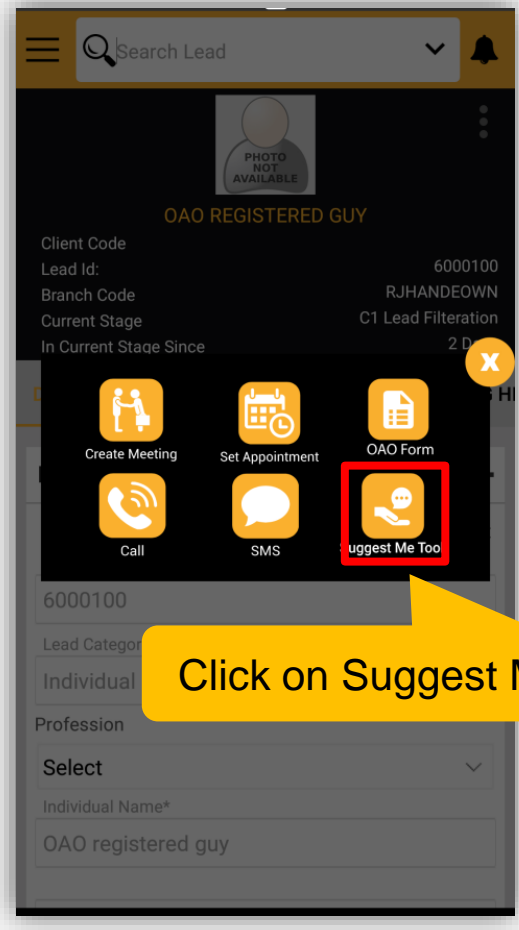
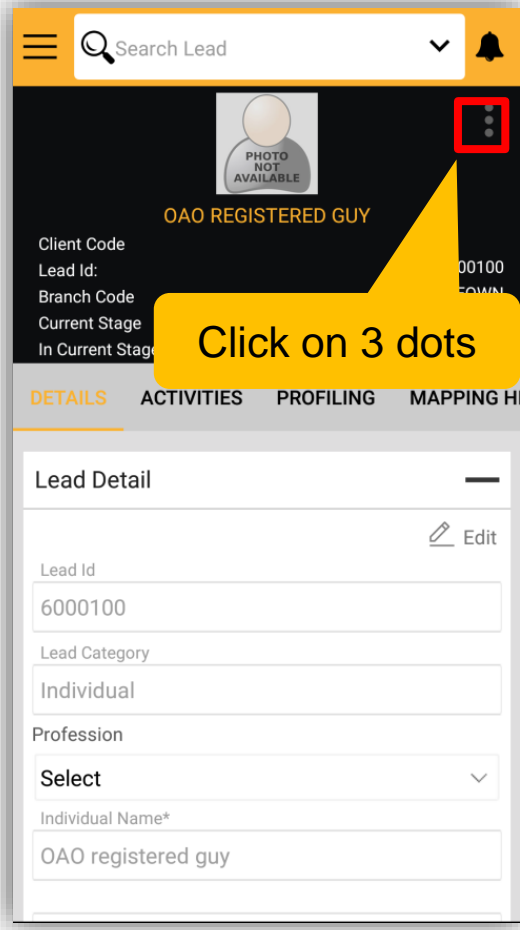
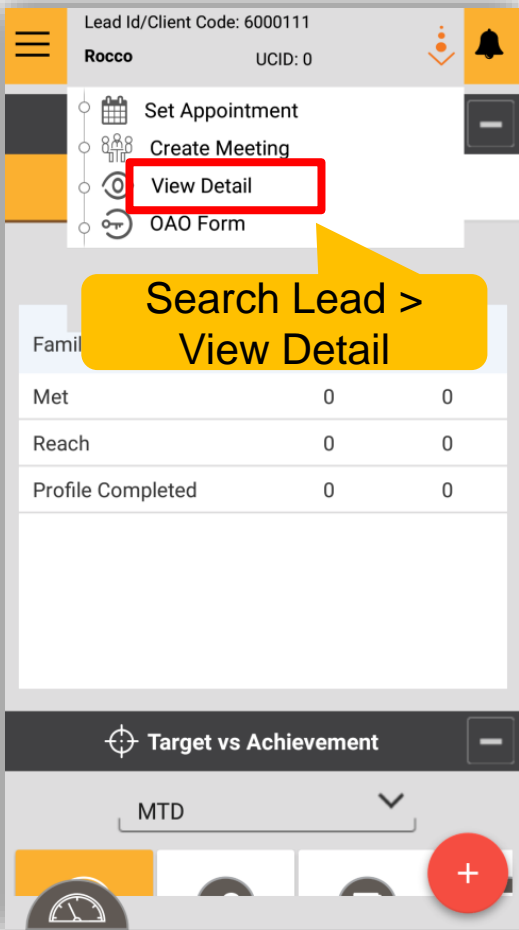
Saathi App

There are 2 ways to access Suggest Me tool:

1. Lead View page
2. Menu

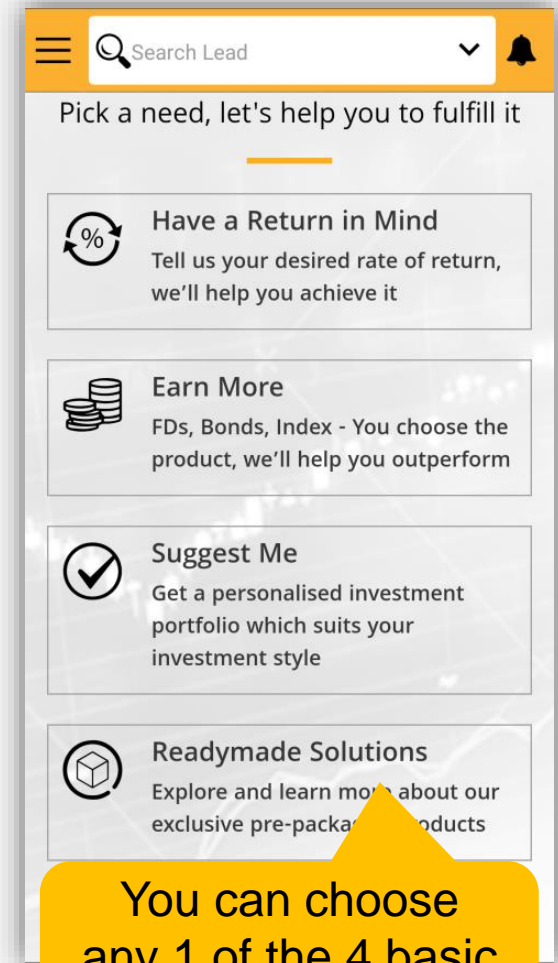
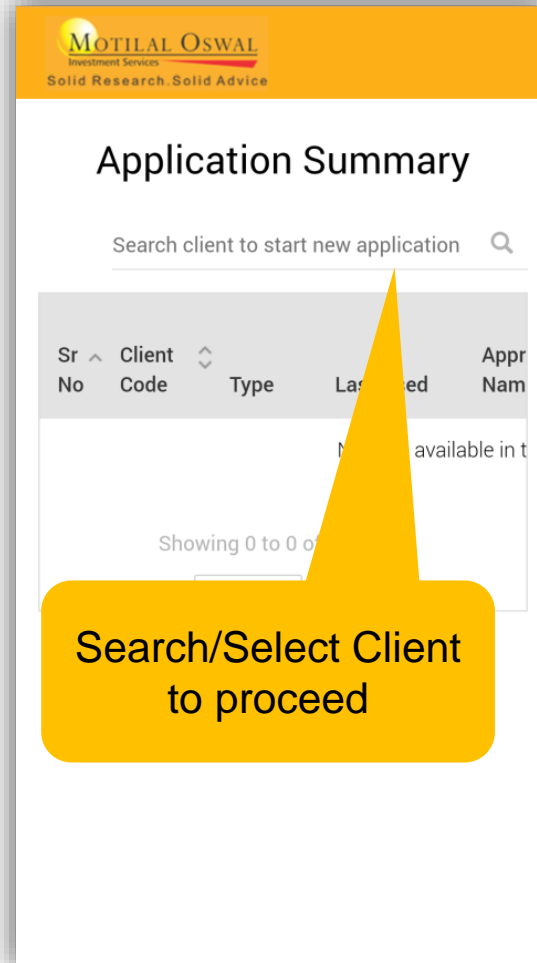
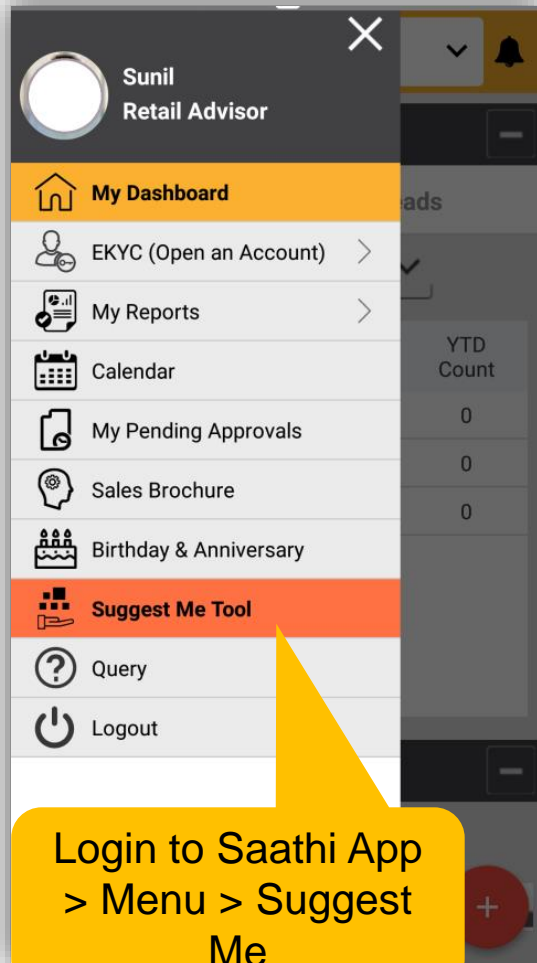
Saathi App

Path 1: From Lead View Page



Saathi App

Path 2: From Menu

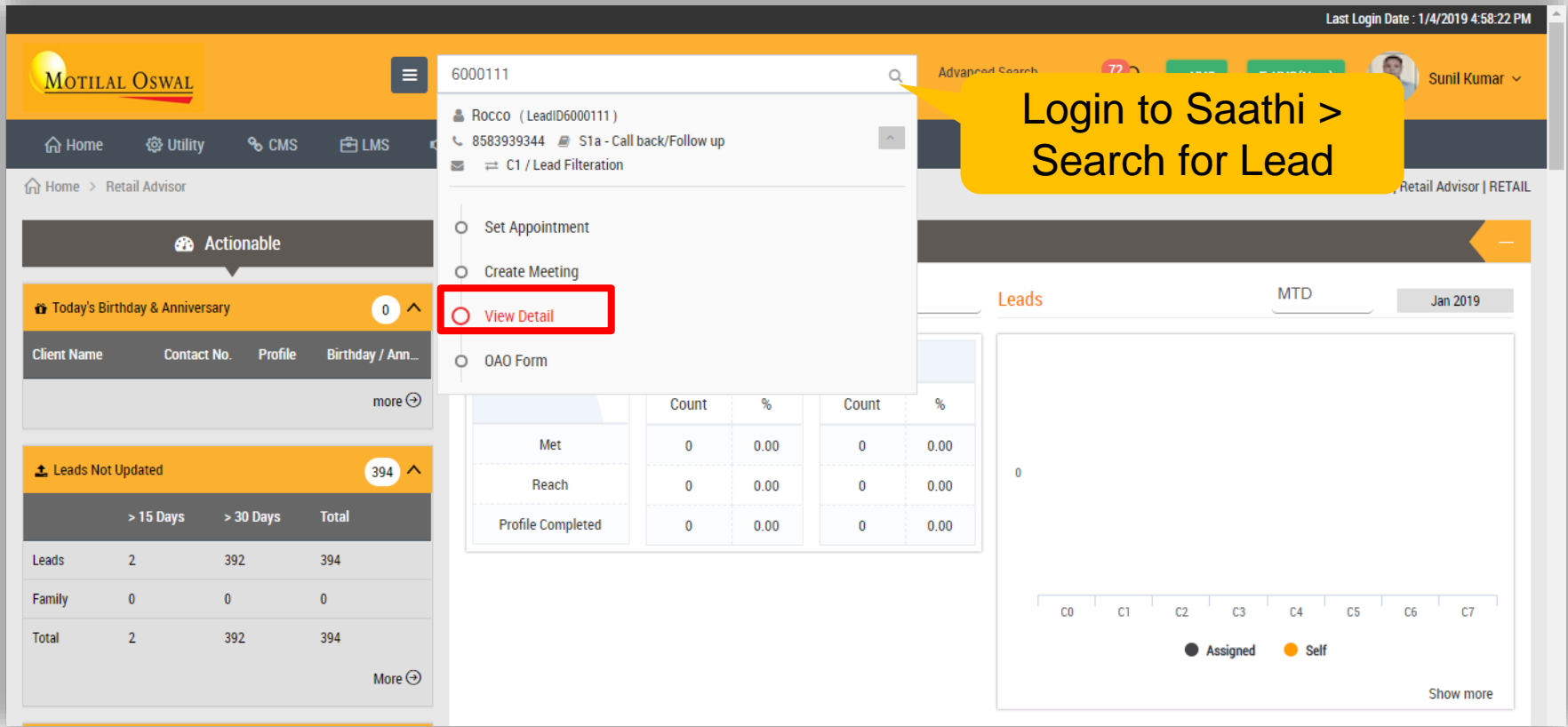


Saathi Web

There are 2 ways to access Suggest Me tool:

1. Lead View page
2. Menu

Path 1: From Lead View Page



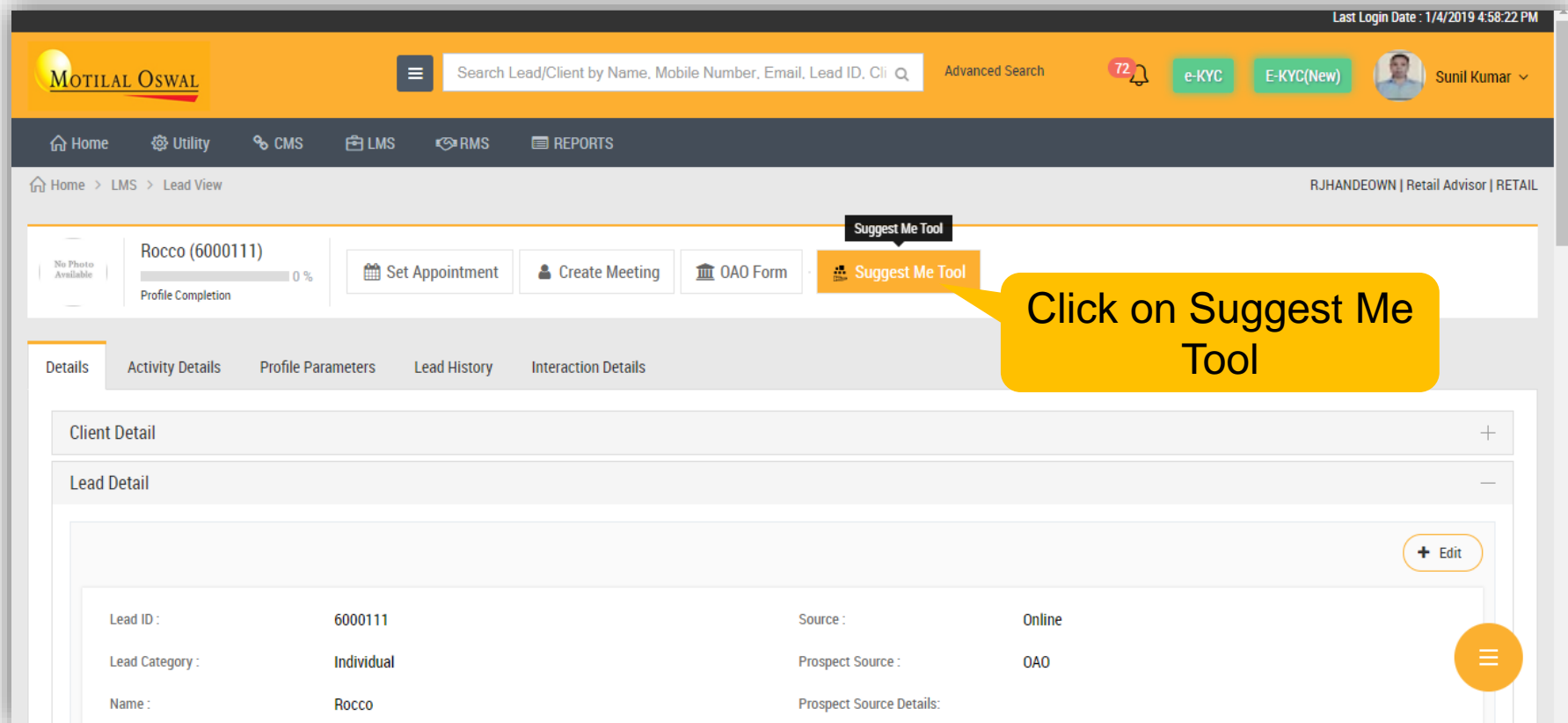
The screenshot displays the Saathi Web interface. At the top, the MOTILAL OSWAL logo is visible on the left, and the user's name 'Sunil Kumar' is on the right. The main content area shows a lead view for 'Rocco (LeadID6000111)'. A dropdown menu is open, listing actions: 'Set Appointment', 'Create Meeting', 'View Detail' (highlighted with a red box), and 'OAO Form'. Below the dropdown is a table with columns for 'Count' and '%'. The table shows zero counts for 'Met', 'Reach', and 'Profile Completed'. On the right side, there is a 'Leads' section with a chart for 'MTD' (Jan 2019) showing a value of 0. A yellow callout box with the text 'Login to Saathi > Search for Lead' is overlaid on the right side of the interface.

Login to Saathi > Search for Lead

	Count	%	Count	%
Met	0	0.00	0	0.00
Reach	0	0.00	0	0.00
Profile Completed	0	0.00	0	0.00

	> 15 Days	> 30 Days	Total
Leads	2	392	394
Family	0	0	0
Total	2	392	394

Path 1: From Lead View Page



Last Login Date : 1/4/2019 4:58:22 PM

Search Lead/Client by Name, Mobile Number, Email, Lead ID, Cli

Advanced Search

72

e-KYC

E-KYC(New)

Sunil Kumar

Home Utility CMS LMS RMS REPORTS

Home > LMS > Lead View

RJHANDEOWN | Retail Advisor | RETAIL

No Photo Available

Rocco (6000111)

Profile Completion 0%

Set Appointment

Create Meeting

OAO Form

Suggest Me Tool

Suggest Me Tool

Click on Suggest Me Tool

Details Activity Details Profile Parameters Lead History Interaction Details

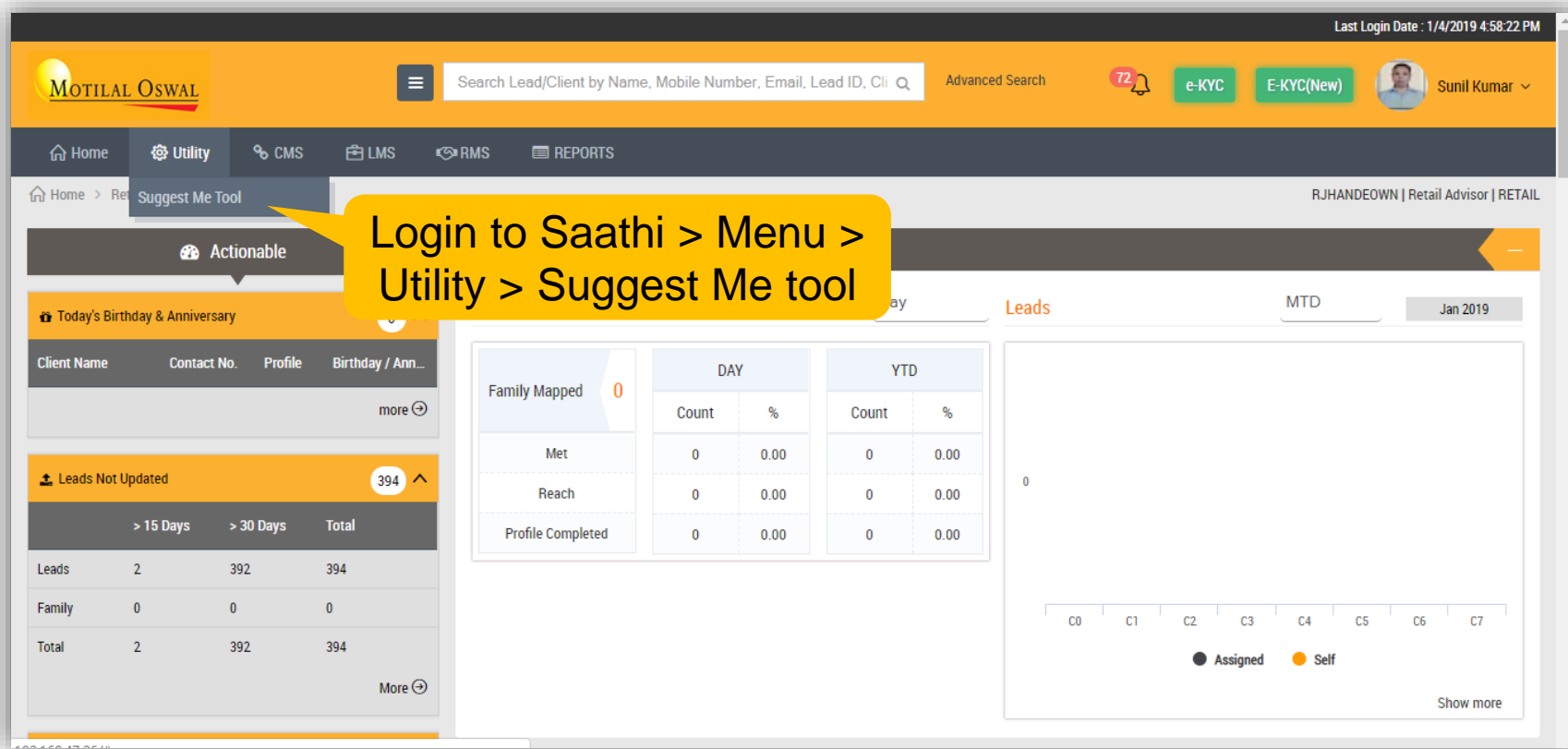
Client Detail

Lead Detail

+ Edit

Lead ID :	6000111	Source :	Online
Lead Category :	Individual	Prospect Source :	OAO
Name :	Rocco	Prospect Source Details:	

Path 2: From Menu



The screenshot shows the Saathi Web dashboard interface. The top navigation bar includes the MOTILAL OSWAL logo, a search bar, and user information (Sunil Kumar). The main navigation menu is visible, with 'Utility' selected. A yellow callout box points to the 'Suggest Me Tool' option under the 'Utility' menu.

Utility Menu:

- Home
- Utility
- CMS
- LMS
- RMS
- REPORTS

Suggest Me Tool Dashboard:

Today's Birthday & Anniversary

Client Name	Contact No.	Profile	Birthday / Ann...
more			

Leads Not Updated (394)

	> 15 Days	> 30 Days	Total
Leads	2	392	394
Family	0	0	0
Total	2	392	394

Family Mapped (0)

	DAY		YTD	
	Count	%	Count	%
Met	0	0.00	0	0.00
Reach	0	0.00	0	0.00
Profile Completed	0	0.00	0	0.00

Leads (MTD: Jan 2019)

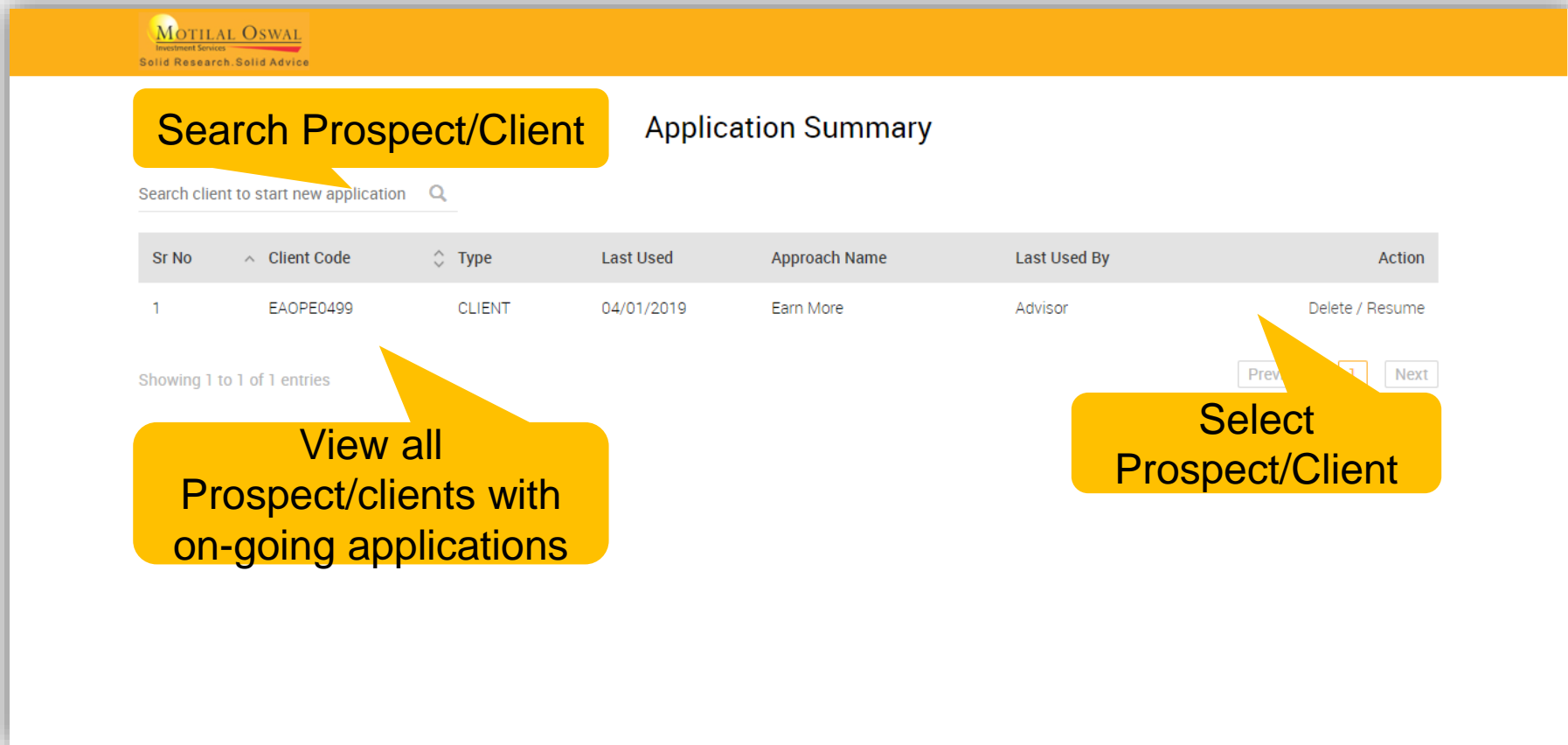
0

Legend: Assigned (Black dot), Self (Orange dot)

Timeline: C0, C1, C2, C3, C4, C5, C6, C7

Show more

Path 2: From Menu



The screenshot shows the 'Application Summary' page in the Saathi Web interface. At the top left, there is a search bar with the text 'Search Prospect/Client' and a search icon. Below the search bar, there is a table with the following columns: Sr No, Client Code, Type, Last Used, Approach Name, Last Used By, and Action. The table contains one entry with Sr No 1, Client Code EAOPE0499, Type CLIENT, Last Used 04/01/2019, Approach Name Earn More, Last Used By Advisor, and Action Delete / Resume. Below the table, there is a pagination control showing 'Showing 1 to 1 of 1 entries' and buttons for 'Prev', '1', and 'Next'. Two yellow callout boxes are present: one pointing to the search bar with the text 'View all Prospect/clients with on-going applications', and another pointing to the '1' button in the pagination control with the text 'Select Prospect/Client'.

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Search Prospect/Client

Application Summary

Search client to start new application 🔍

Sr No	Client Code	Type	Last Used	Approach Name	Last Used By	Action
1	EAOPE0499	CLIENT	04/01/2019	Earn More	Advisor	Delete / Resume

Showing 1 to 1 of 1 entries

Prev 1 Next

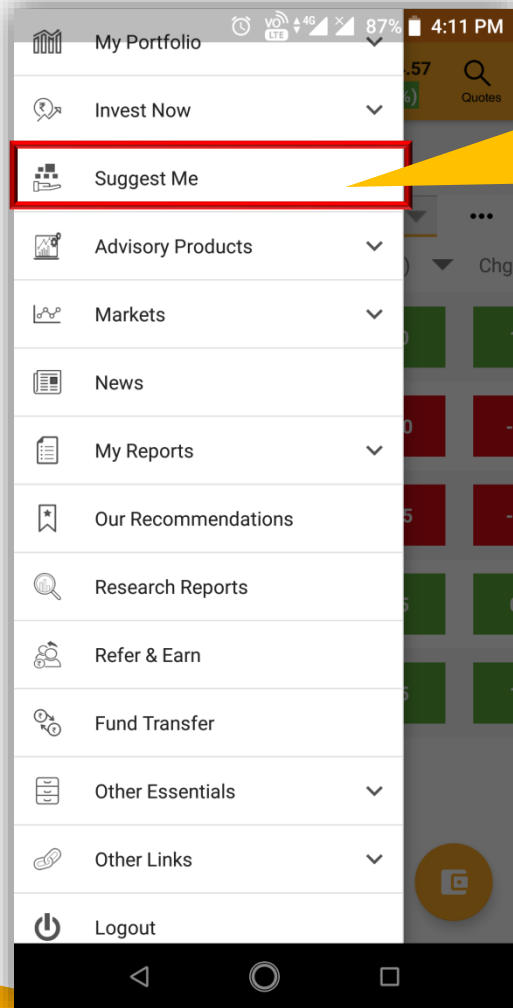
View all Prospect/clients with on-going applications

Select Prospect/Client

MO Investor App

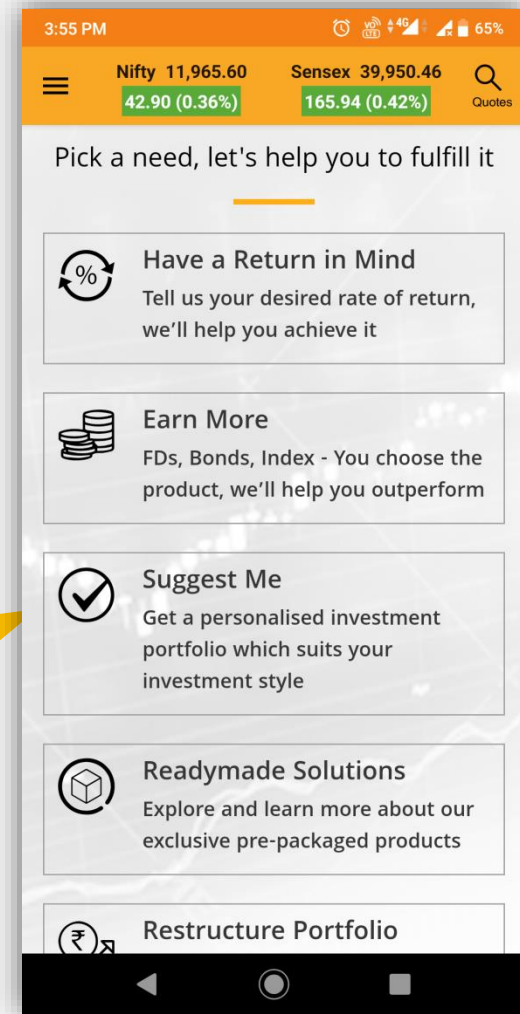
MO Investor App

MO Investor App



Open **MO Investor App** > Go to **Menu** > Click on **Suggest Me**

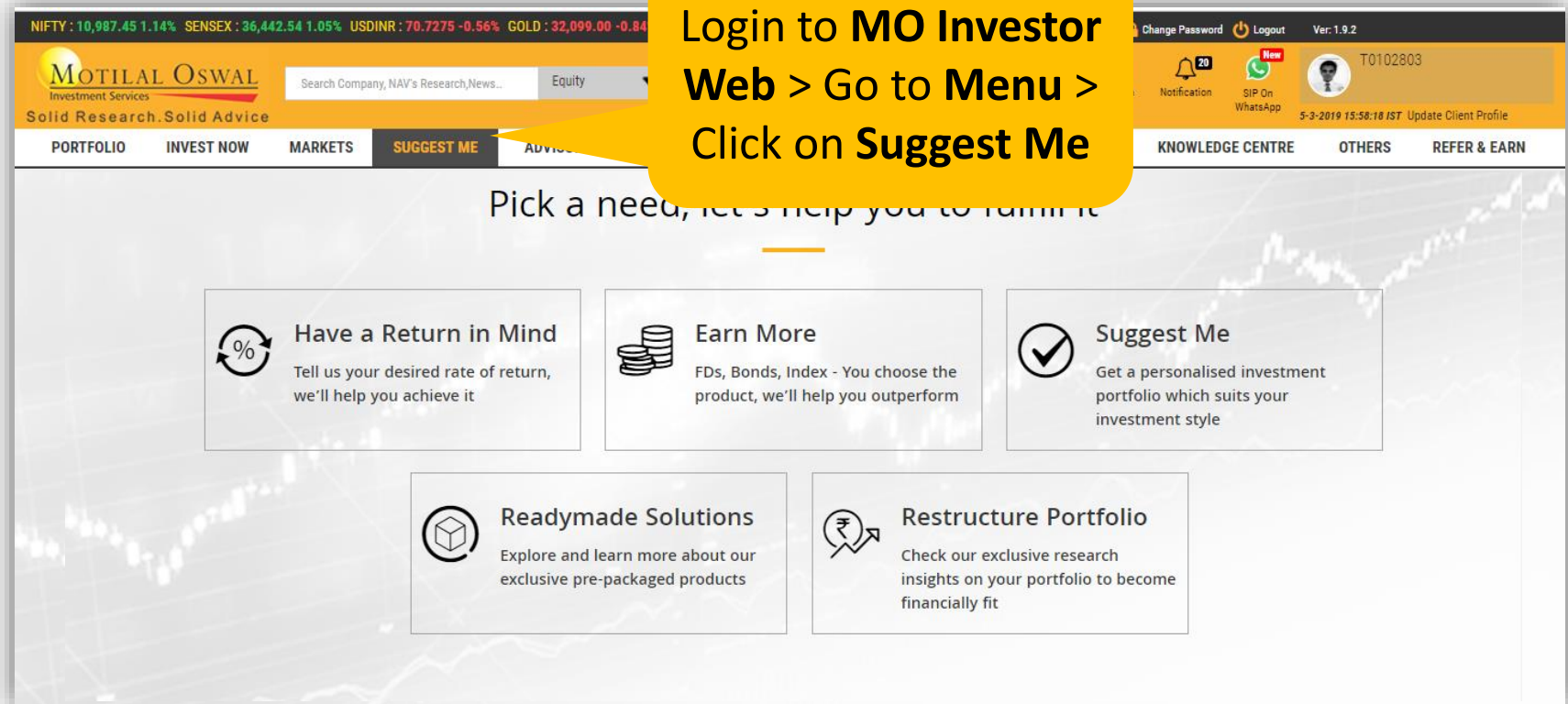
You can choose any 1 of the 5 basic needs of an Investor



MO Investor Web

MO Investor Web

Login to MO Investor Web > Go to Menu > Click on Suggest Me



The screenshot shows the MO Investor Web homepage. At the top, there is a navigation bar with the Motilal Oswal logo, a search bar, and a menu with items: PORTFOLIO, INVEST NOW, MARKETS, SUGGEST ME, and ADVISOR. A yellow callout box highlights the 'SUGGEST ME' menu item. Below the navigation bar, there is a main heading 'Pick a need, let's help you to fulfill it' and five service cards: 'Have a Return in Mind', 'Earn More', 'Suggest Me', 'Readymade Solutions', and 'Restructure Portfolio'. The 'Suggest Me' card is highlighted with a checkmark icon.

NIFTY : 10,987.45 1.14% SENSEX : 36,442.54 1.05% USDINR : 70.7275 -0.56% GOLD : 32,099.00 -0.84%

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Investment Services
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Search Company, NAV's Research, News... Equity

Change Password Logout Ver: 1.9.2

Notification 20 SIP On WhatsApp T0102803 5-3-2019 15:58:18 IST Update Client Profile

PORTFOLIO INVEST NOW MARKETS **SUGGEST ME** ADVISOR

KNOWLEDGE CENTRE OTHERS REFER & EARN

Pick a need, let's help you to fulfill it

- Have a Return in Mind**
Tell us your desired rate of return, we'll help you achieve it
- Earn More**
FDs, Bonds, Index - You choose the product, we'll help you outperform
- Suggest Me**
Get a personalised investment portfolio which suits your investment style
- Readymade Solutions**
Explore and learn more about our exclusive pre-packaged products
- Restructure Portfolio**
Check our exclusive research insights on your portfolio to become financially fit

Website

Website



Open www.motilaloswal.com > Go to **Menu** > Click on **Suggest Me**

The screenshot shows the Motilal Oswal website interface. At the top, there's a header with market indices (NIFTY, SENSEX, USDINR) and the company logo. Below the header is a navigation menu with options: MARKETS, RESEARCH, ADVICE, TECHNOLOGY, PRODUCTS, LEARN, WHY US?, TIP, **SUGGEST ME**, and PARTNER US. The 'SUGGEST ME' option is highlighted with a yellow callout box. Below the navigation menu, there's a main heading 'Pick a need, let's help you to fulfill it' followed by five service cards: 'Have a Return in Mind', 'Earn More', 'Suggest Me', 'Readymade Solutions', and 'Restructure Portfolio'. The 'Suggest Me' card is highlighted with a yellow background.

NIFTY : 10,991.50(1.18%) SENSEX : 36,447.43(1.06%) USDINR : 70

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Equity Search Company, News, Research, News, Analysts... Login To Trade Become a Partner Open an Account

MARKETS RESEARCH ADVICE TECHNOLOGY PRODUCTS LEARN WHY US? TIP **SUGGEST ME** PARTNER US

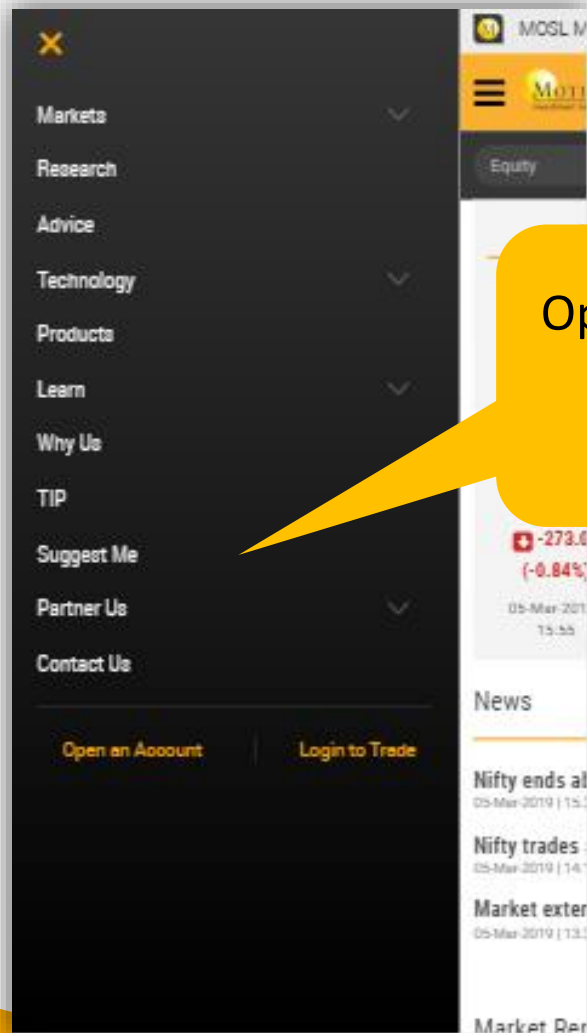
Pick a need, let's help you to fulfill it

- Have a Return in Mind**
Tell us your desired rate of return, we'll help you achieve it
- Earn More**
FDs, Bonds, Index - You choose the product, we'll help you outperform
- Suggest Me**
Get a personalised investment portfolio which suits your investment style
- Readymade Solutions**
Explore and learn more about our exclusive pre-packaged products
- Restructure Portfolio**
Check our exclusive research insights on your portfolio to become financially fit

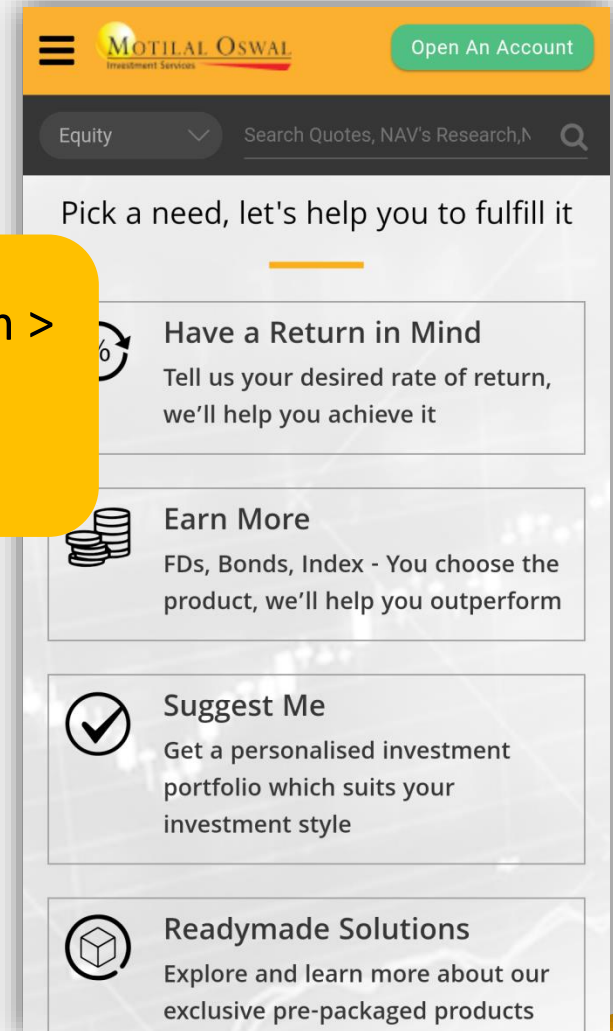
javascript:void(0);

Mobile site

Mobile site



Open m.motilaloswal.com >
Go to **Menu** > Click on
Suggest Me



Thank You