

Client Portal Quick Help Document

Welcome to the Motilal Oswal Wealth family.

The portal is designed to give you an easy navigation through dashboards for your investments and its deployment in different schemes.

Here's a quick tour for you to go through our new portal and explore the features it has to offer.

How do you get there?

Log in to www.motilaloswalpwm.com

Our Home page has just the right set of information that you would be looking out to get started with. The different sections on the login page beginning left to right talk about the following.

[About Us](#)

[4C Framework](#)

[Knowledge Center](#)

[Media](#)

[Our Blog](#)

[Group Website Tab](#) (extreme top right corner) gives you a detailed insight of every business that we are into.

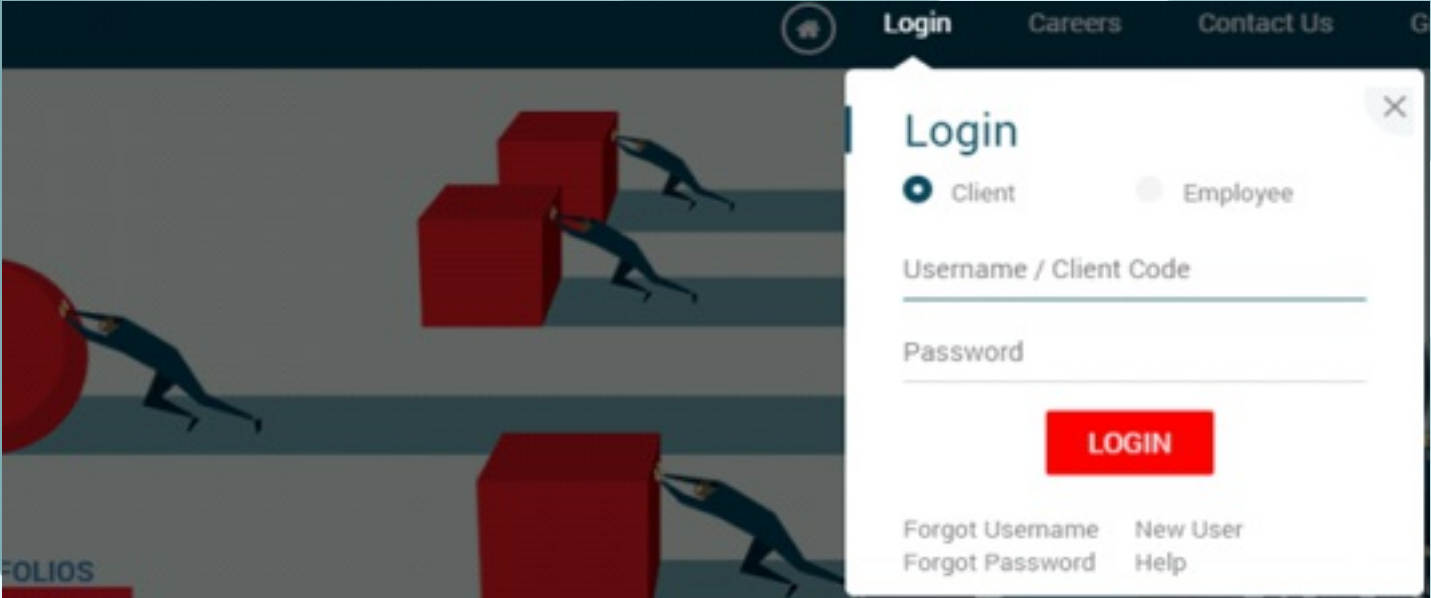


Let's now take a look at your investments!

On the Homepage please click on the **Login** tab.



A Login window pops up.

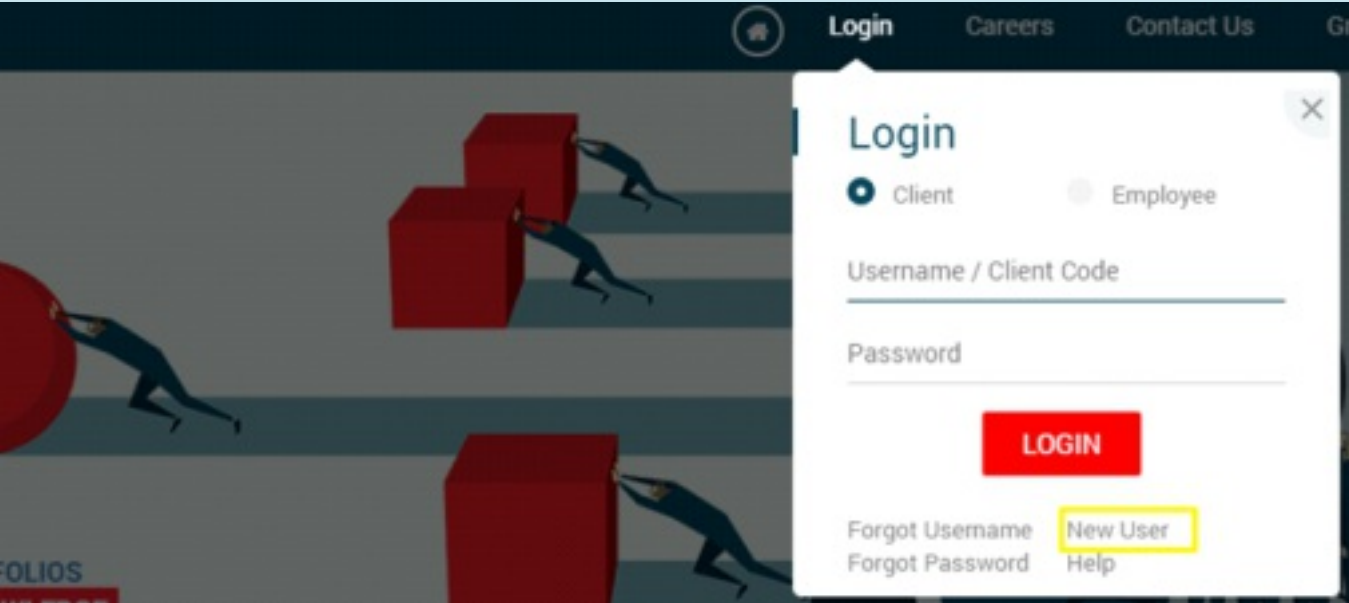


Please click on the client radio button. Please enter the Client code assigned to you at the time of account opening or the username that you have set and the password that you have set and click on Login.

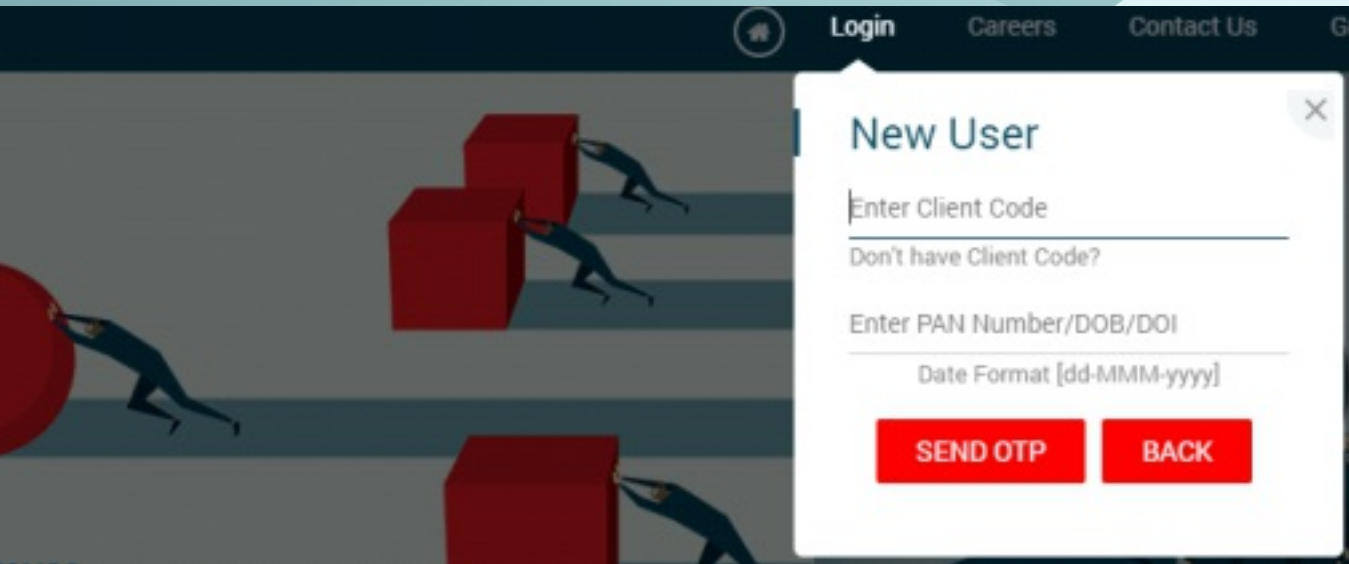
Below is the detailed explanation of each of the scenarios that you may face while logging into the system.

1. If you are a New User, then you need to do the one time registration to set your username and password.

Click on **New User** option on the login screen.




You will be prompted to enter your client code (Client Code is mentioned in the Welcome Letter sent to your registered email ID) followed by your PAN No. Registered with us/Date of Birth. In case if it's a non-individual/company account, date of incorporation needs to be entered.



Once you have entered the details, please click on Send OTP. You will receive the OTP on your registered email address and mobile number. Please see that this OTP is valid for 30 minutes only. In case you have not received OTP, you can request to resend OTP after 5 minutes.

Once you enter the OTP, the system will take you to a screen to setup your new username & password. Password policy is mentioned beside for your reference.



PRIVATE

WEALTH

Change Password

[Change Username](#)

Enter Existing Password

Enter New Password

Confirm New Password

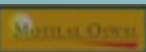
SAVE

CANCEL

Password Policy:

- Minimum length 8 characters
- One UPPERCASE character mandatory (A-Z)
- One lowercase character mandatory (a-z)
- One number mandatory (0-9)
- One special character mandatory (@ # ~ ! \$ % ^ * ? / < > { } . , - _ +)

Once you click on SAVE button in the above screen, your username & password will be saved and you will be asked to re-login.



PRIVATE

WEALTH

Online WB

My Portfolio

Help

Account Details

Name

Client Code

Username

NULL

Pass

Change Username

Change Password

Client Code

Account Creation Date

08 Apr 2019

Type of firm

28

Contact Details

Registered Address

Contact Number(s)

Family Members Registered with Us

Member Name	Account ID	Account Type
Mr. [redacted]	407376	INDIVIDUAL
Mr. [redacted]	408147	INDIVIDUAL

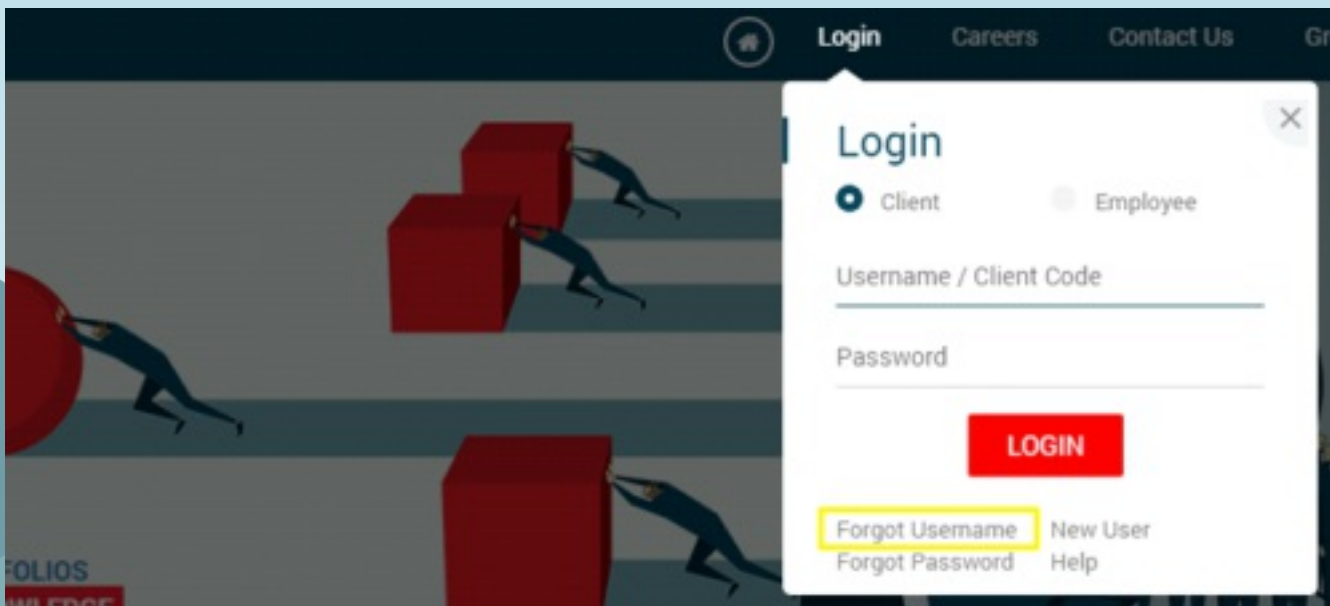
Password changed successfully. Please re-login with new password

OK

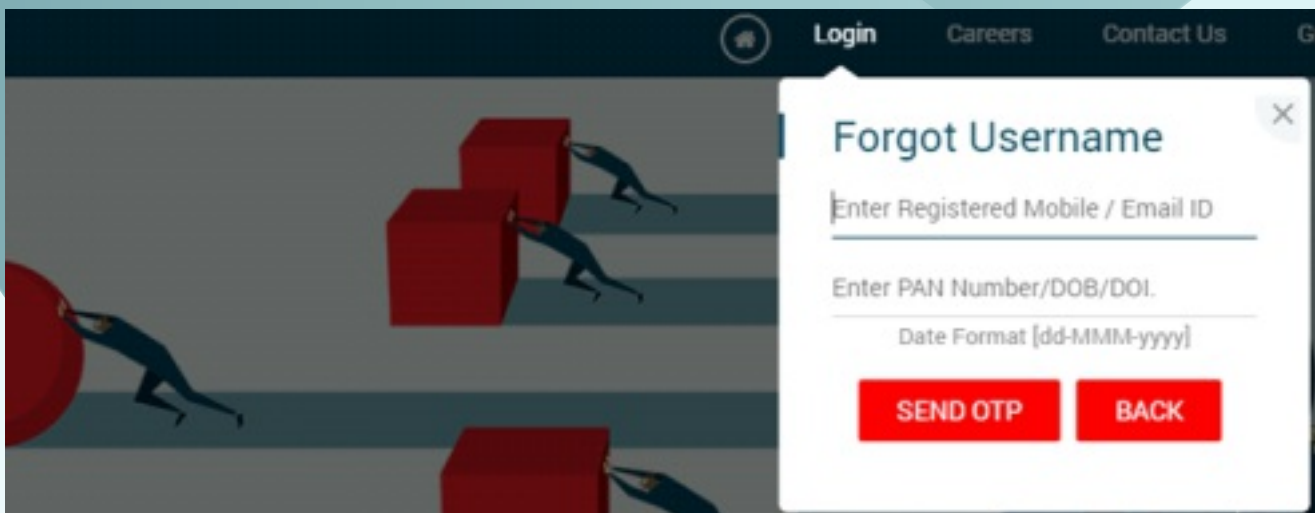
Click on OK and re-login with your new credentials to view all the information you would want to know about your investments.

2. If you have forgotten your Username

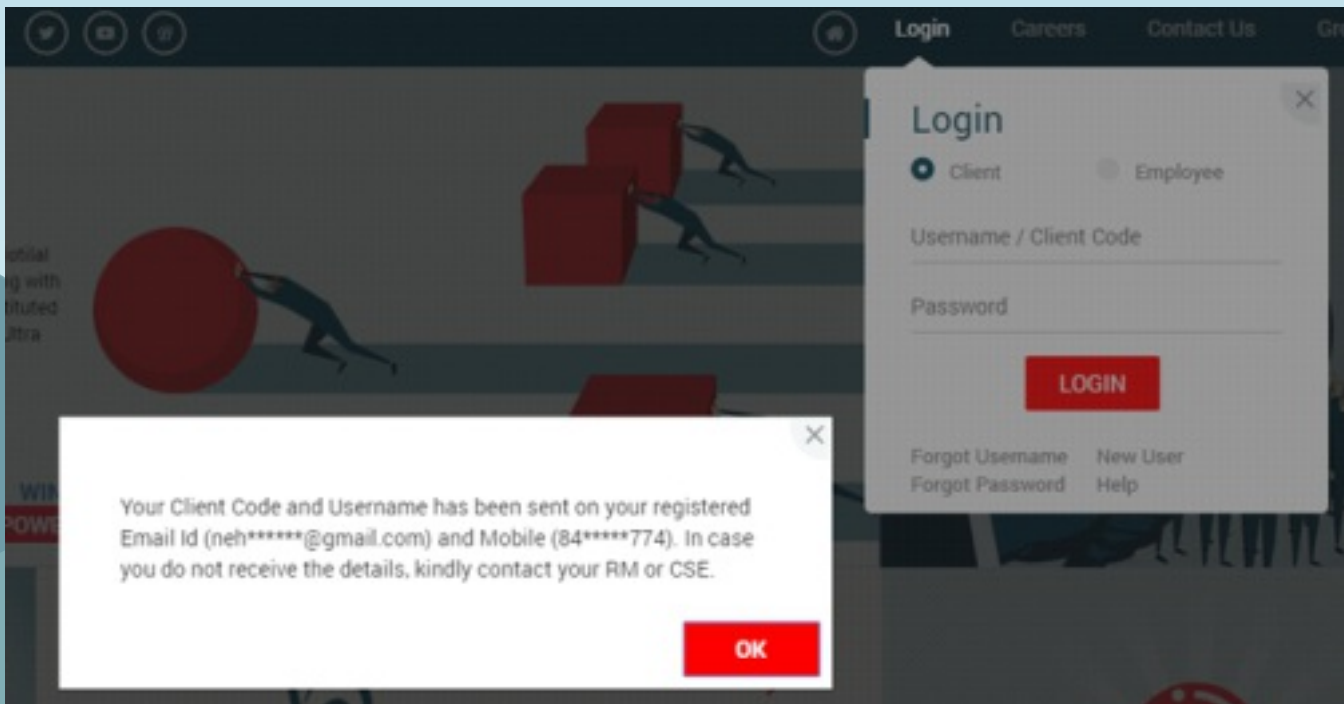
Click on **Forgot Username** option on the login screen.



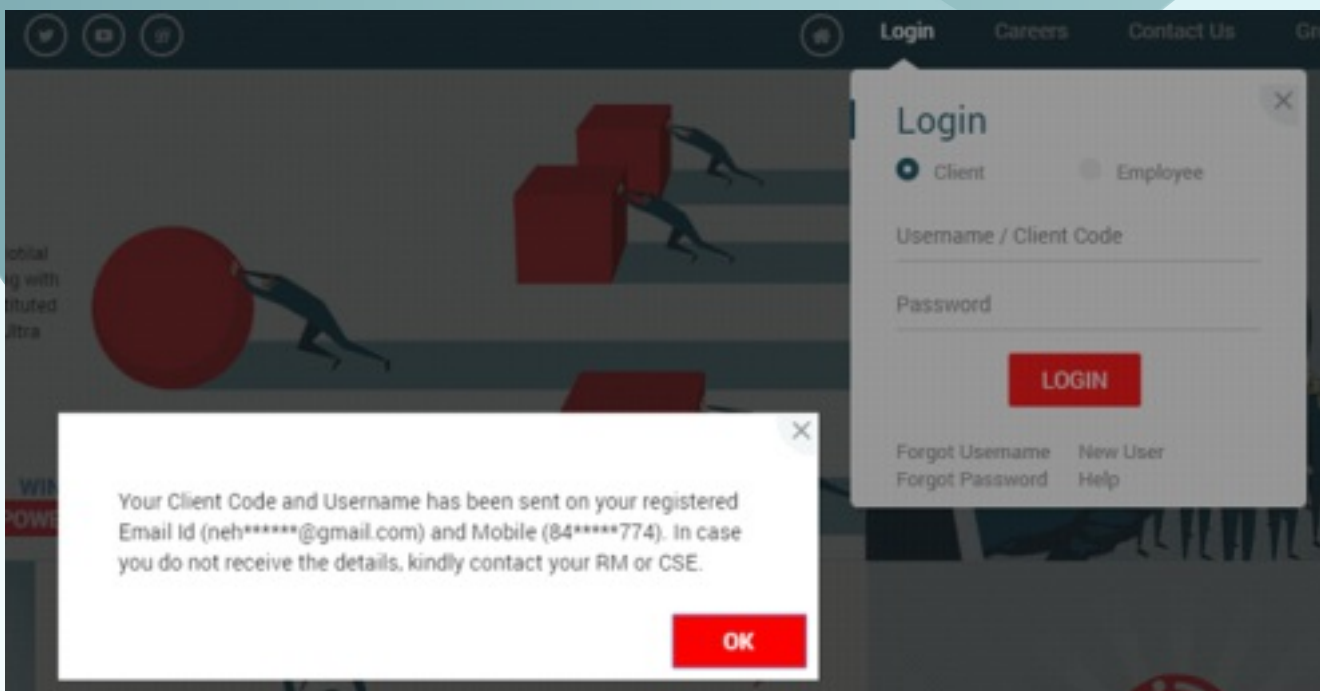
You will be prompted to enter your registered mobile number or email address followed by your PAN No. registered with us/Date of Birth. In case if it's a non-individual/company account, date of incorporation would have to be entered.



Once you have entered the details, please click on Send OTP. You will receive the OTP on your registered email address and mobile number. Please see that this OTP is valid for 30 minutes only. In case you have not received OTP, you can request to resend OTP after 5 minutes.

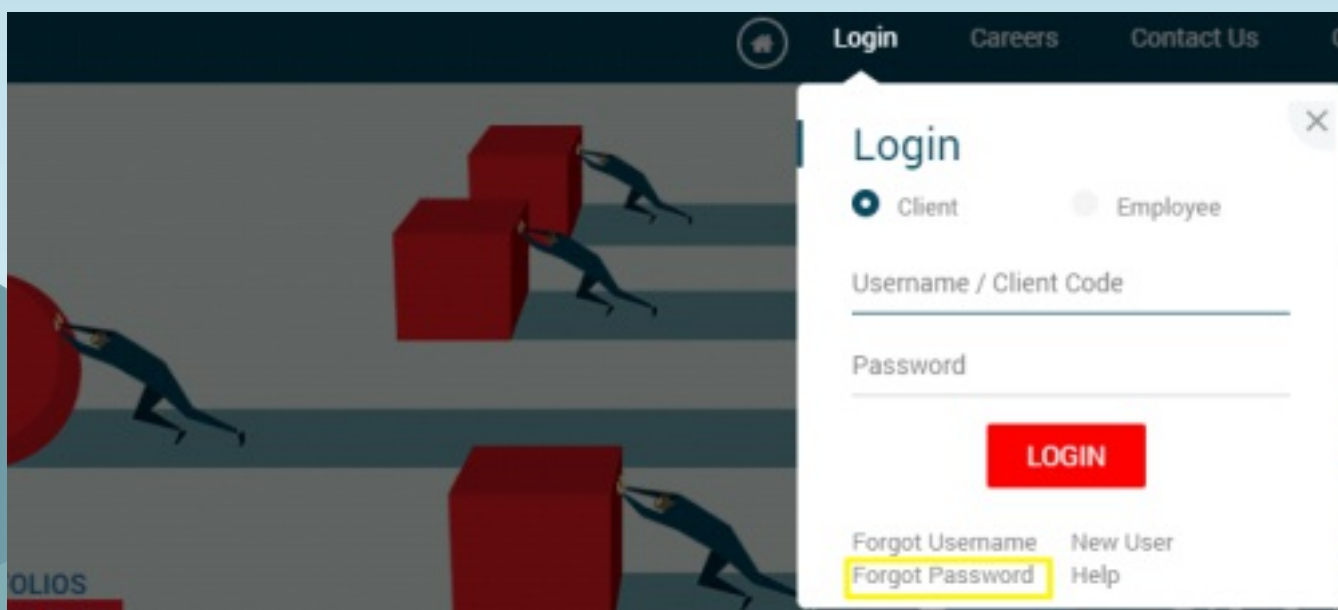


Once you enter the OTP, your username and client code would be sent to your email and mobile number.

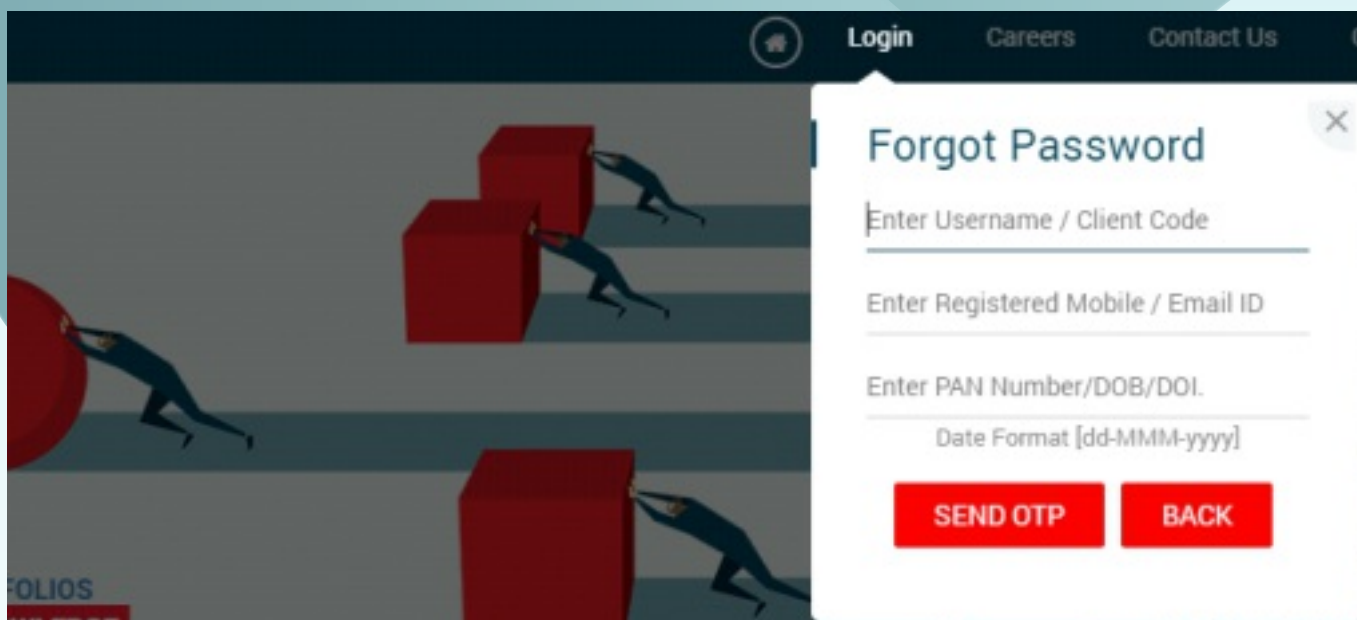


3. If you have forgotten your Password

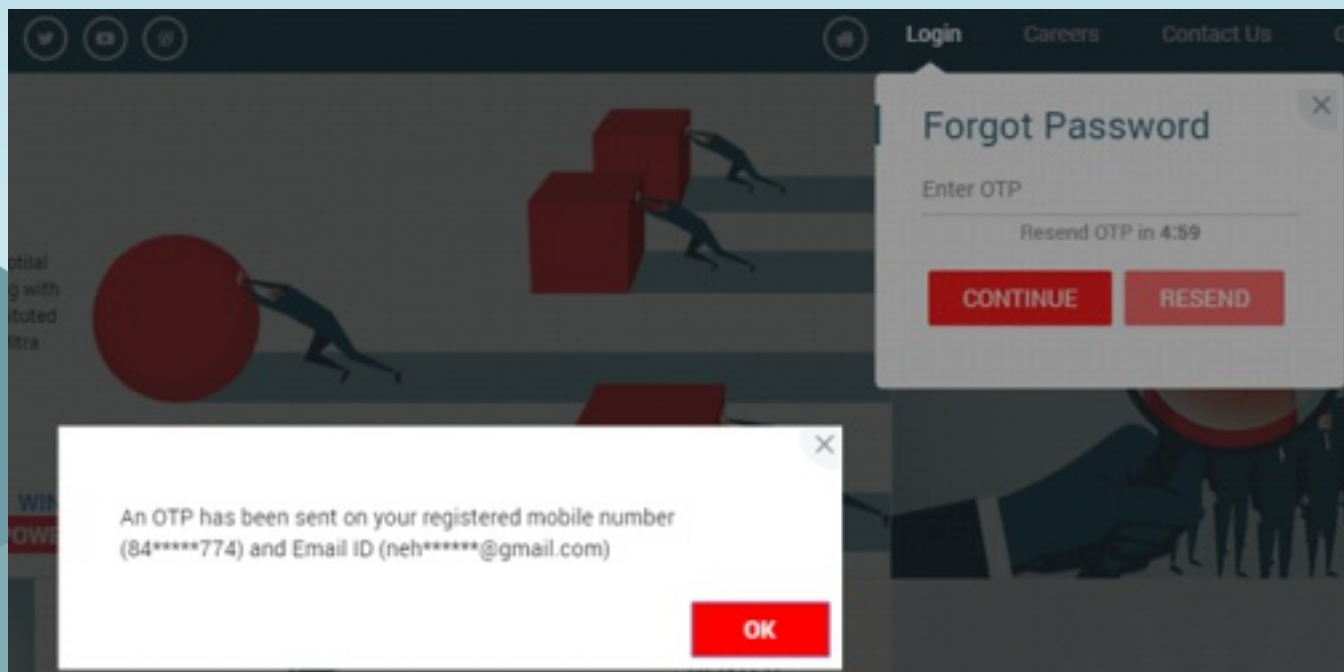
Click on **Forgot Password** option on the login screen



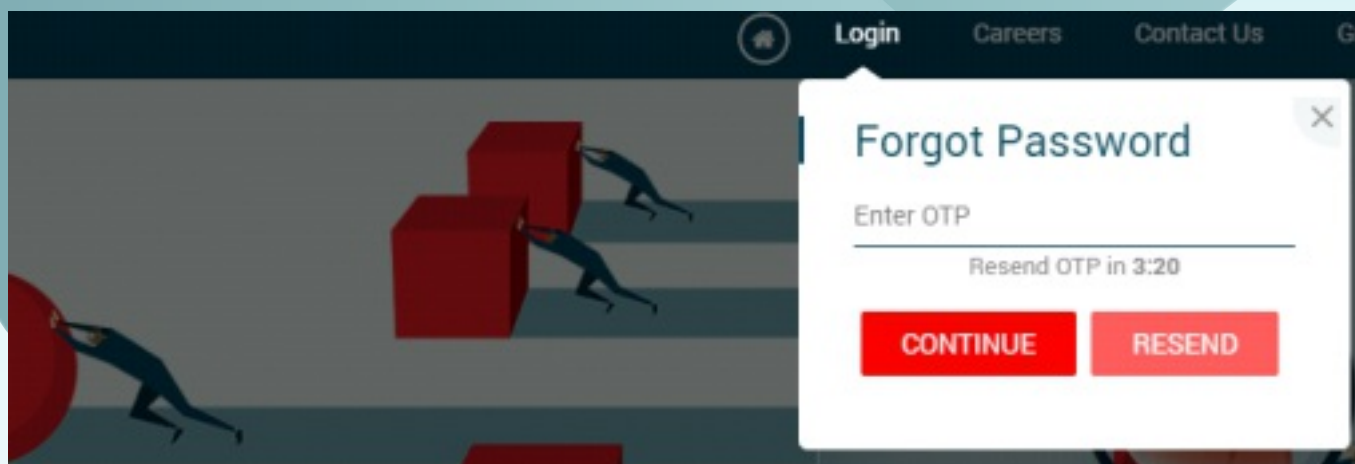
You will be prompted to enter your username or Client code followed by your registered mobile number/email address and your PAN No. registered with us/Date of Birth in the third field. In case if it's a non-individual/company account, date of incorporation would have to be entered.



After you have entered the details, please click on Send OTP. You will receive the OTP on your registered email address and mobile number. Please see that this OTP is valid for 30 minutes only. In case you have not received OTP, you can request to resend OTP after 5 minutes.



Please enter the OTP as prompted.



MOTILAL OSWAL

PRIVATE WEALTH

Change Password

Enter Existing Password

Enter New Password

Confirm New Password

SAVE

CANCEL

[Change Username](#)

Password Policy:

- Minimum length 8 characters
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- One lowercase character mandatory (a-z)
- One number mandatory (0-9)
- One special character mandatory (@ # ~ ! \$ % ^ * ? / < > { } , . - _ +)

Account Details

NAME

Client Code

Registered Address

Username

Account Creation Date

Contact Number(s)

PNV

Date of Birth

CHANGELINKNAME

CHANGELINKPASSWD

Family Members Registered with Us

Member Name	Account ID	Account Type
Mr. [REDACTED]	407376	INDIVIDUAL
Mr. [REDACTED]	408167	INDIVIDUAL

Private Wealth

Online Web

My Portfolio

Help

Password changed successfully. Please re-login with new password

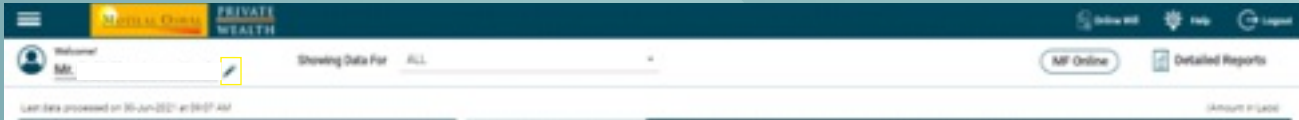
OK

What can you view/do as soon as you have reached the dashboard page?

Once you have logged in, you would have an access to the dashboard displaying all details as shown in the picture below.



In case if you wish to change your username, you simply click the edit sign next to the name.



Below screen will open from where you can change your Username and Password and view your and your family details.

The 'Client Profile' page contains the following fields and options:

- Change Username** and **Change Password** buttons at the top.
- Name**: Input field with a dropdown arrow.
- Client Code**: Input field with a dropdown arrow.
- Username**: Displayed as 'NULL'.
- Account Creation Date**: Displayed as '08 Apr 2019'.
- PAN**: Input field with a dropdown arrow.
- Date of Birth**: Input field with a dropdown arrow.

At the bottom, there is a section titled 'Family Members Registered with Us'.



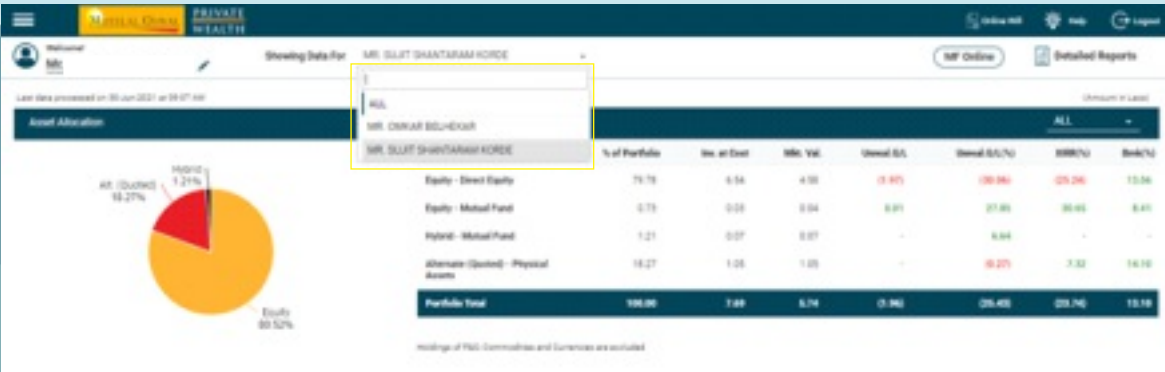
P.S.: You can only change the username and password. For all other changes/corrections please get in touch with your Relationship Manager.

Reports:

In case if you are the head of the family , you can view the investment at family level as well as for other family members onboarded with MOFSL Wealth.

To view the portfolio at family level, select All in “Showing Data for” dropdown

To view the portfolio of a particular family member, select the family member name in “Showing Data for” dropdown



The Detailed Reports section gives you an option of the following reports and features.

Productwise Summary

Product Name	% of Portfolio	Inv. at Cost	Mkt. Val.	Unre
No investment found !				
Portfolio Total				

Holdings of F&O, Commodities and Currencies are excluded

WEALTH REPORTS

Consolidated Wealth Statement

Transaction Statement

Dividend/ Interest Report

Capital Gain/ Loss Report

MOAMC PMS Holdings

Underlying Company Search

MF REPORTS

Comprehensive Summary

UTILITIES

Market Price Updation

You can pick and choose what you wish to see and can either download it or email it to yourself.

Da

Consolidated Wealth Statement

Member

Period

☒ Since Inception
 ☐ Previous Financial Year
 ☐ Last Month
 ☐ Current Financial Year
 ☐ As On Date

Additional Reports

Select Reports

DOWNLOAD

E-MAIL

The Generate Summary Report tab gives you a quick summary of all the investments you have done since your account's inception with us.

Welcome!

Ms.

Showing Data For

MS. NEHA SINGH

Detailed Reports

Last data processed on 12-May-2020 at 10:18 AM

(Amount in Lacs)

Asset Allocation

Productwise Summary

ALL

Product Name	% of Portfolio	Inv. at Cost	Mkt. Val.	Unreal. G/L	Unreal. G/L (%)	XIRR (%)	Brnk (%)
No investment found!							
Portfolio Total							
Holdings of F&O, Commodities and Currencies are excluded							

My Portfolio

Generate Summary Report

Asset Class	% of Portfolio	Inv. at Cost	Mkt. Val.	Dividend	Unreal. G/L	Unreal. G/L (%)	XIRR (%)	Brnk (%)
Equity								

Activate Windows

Happy Investing!

