



Welcome to the Motilal Oswal 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 let to right talk about the following.

About Us

4C Framework

Knowledge Center

Media

Our Blog

Group Website (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.

			Careers	Contact Us Group Website	
nt Us	Alpha		4	Client Employee Username / Client Code Password	
/	Strategist		Infinite Possibilit Enduring Relatio	LOGIN Forgot Username Forgot Password	New User Help
×**	Infinite Possibilities Enduring Relationships	OL.			

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.

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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.

t Us	Alpha Strategist		Careers	Contact Us Group Website - Login - New User Enter Client Code Don't have Client Code? Enter PAN Number/DOB/DOI Date Format [dd-MMM-yyyy] SEND OTP BACK	X
*	Infinite Possibilities Enduring Relationships	OL.			

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.

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Orient and Ediminia	Chance Username Password Policy:	
Set here Patroneer	Minimum length 8 characters One UPPERCASE character mandatory (A-2)	
Control Anna Papanetti	One lowercase character mandatory (a-z) One number mandatory (0-5) One special character mandatory	
Save	(@#\$%∧&*?/‹>{}+)	

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

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	Testing123	busedinks	
	_	Monume length & character manufacture One UPPERCASE character manufactury (4-2) One overstate character manufactury (4-2)	
		0 • One surface manufactor (0-1) • One specie charactery manufactor (g) if = (12 × 1 + 2) + (12 - 2 + 2)	
	Save	Your new condentials have been saved successfully Kindly login again with your new condentians to access your account.	
			Statumer' & 2015 Monte Losse, al right-mo

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.

			Careers	Contact Us Group Website 👻	
				Client Employee	
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it Us	Strategist		Infinite Possibilit		
/			Enduring Relatio	Forgot Username Forgot Password	New User Help
***	Infinite Possibilities Enduring Relationships	X0			

Click on Forgot Username option on the login screen.

		Careers	Contact Us Group Website Login
Us	Alpha Strategist	A Infinite Possibilit Enduring Relation	Enter Registered Mobile / Email ID Enter PAN Number/DOB/DOI. Date Format [dd-MMM-yyyy] SEND OTP BACK





You will be prompted to enter your registered mobile number or email address followed by your PAN card registered with us/Date of Birth. 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.



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







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

×
User Help
Use





You will be prompted to enter your username or Client code followed by your registered mobile number/email address and your PAN card 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.







As soon as you enter the OTP, you will be prompted to change the password.

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Quiete àsue scole same	Chance Username Possword Policy:	
fair here Parameter	Minimum length 8 characters One UPPERCASE character mandatory (A-2) One lowercase character mandatory (a-2) One number mandatory (a-2) One number mandatory (a-9) One special character properties of the special character p	
Save	(@#\$%∧&*?/↔{}+)	
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Once you have entered the new password, you will be prompted to login again.







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.

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B Welcome! Showing Data For	ECONOMIC PHARMACEUTICALS GROUP	M/SECONOMIC PHARMAC	EUTICAL PV.					A Enable	MF Online [Detailed Reports
Last data processed on 08-Apr-2025 at 11:02 AM										(Amount in Lacs)
Asset Allocation		Produc	twise Summary							A11
		Product Nome		% of Portfolio	Inv. at Cost	MRI. Vol.	Unreal.0/L	Unreal.0/L(%)	xme(x)	Brok.XBB(%)
	Edd SESTS	Equity - Mutual	fund	40.00	55.65	208.67	148.84	248.77	12.83	10.25
Def: Statistic Statis Statis Statis <td>2.47</td> <td>7.88</td>	2.47	7.88								
	5.84	9.62								
My Portfolio		*Note : 1) Holdings c 2) XRR(%) or	f F&O, Commodities and C Id Benchmark XIRR(%) are	urrencies are excluded. shown only for Gold Bonds.					D one	
Asset Closs	% of Portfolio	Inv. at Cost	Mkt. Vol.	Dividend	Un	real. G/L	Unreal 0/L (%)	XIR	e (%)	Bmk.XIRR(%)
✓ Equity	40.03	59.83	208.67			148.84	248.77		13.83	13.21
✓ MultiAsset										-
V Debt	55.57	17.18	212.59			141.40	82.87		2.42	7.53
✓ Alternate (Quoted)										-
∨ Cash									-	-
Sub-Total (Excl. Alternate Unquarted)	100.00	222.00	10.05			100.14	105.45		5.84	9.62
 Alternate (unquoted) 										

- Logout button
- PDF reports can be generated from here
- User can select family & clients for whom he wants to view the report Dashboard shows the Product wise summary
- Dashboard shows the Family Member wise summary Dashboard shows the Asset allocation
- Multi level view of portfolio (Asset class > Product class > Schemes/scripts/funds Hamburger menu for easy navigation

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



Last data processed on 08-Apr-2025 at 11:02 AM

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





Reports:

In case if you are the head of a family and have other accounts mapped under your account with us, if you wish to view details of the family members, you can go to the **"Showing Data Portal"** and select the name of the family member you wish to see the investment summary for.



In case if you wish to see a summary of all the investments made at a glance, you could click on the member wise summary and take a quick look at all the numbers whereas the product wise summary gives you a detailed glance of the investments done in different asset classes.

In case if you have a single account and are the owner for the same, you could see all the details as mentioned above for your investments.





The **Detailed Reports** section gives you an option of the following links.

			4	Enable MF Online	etailed Reports
				Wealth Reports	× ount in Lacs)
				Consolidated Wealth StatemenTransaction Statement	t
Inv. of Cost	MRI, Vol.	Unreal.0/L	Unred	Dividend/ Interest ReportCapital Gain/Loss Report	sma.xms(x)
55.65				MOAMC PMS Holdings MF Reports	13.29
01.0				1.0 1.0	7.53
20.02	521.26	290.24	12	5.63 5.84	9.62

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

Period	۲	Since Inception	0	Previous Financial Year	
	0	Last Month			
	0	Current Financial Yea	r.		
	0	As On Date			
	0	Custom Date			
Additional Reports	8	Transaction		Dividend/ Interest	
		Capital Gain/Loss		MOAMC PMS Holdings	
		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.

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Welcome! XXXX	Showing Data For	ECONOMIC PHARMACEUTICALS DROUP	M/SECONO	OMIC PHARMACEUTICAL PV. •					Lenat	ole MF Online	Detailed f	Reports
Last data processed on 08-	Apr-2025 at 11:02 AM										(Amoun	nt in Lacs)
Asset Allocation				Productwise Summary							ALL	
	Debt —	- Equity 40.03%	P	voduct Name	% of Portfolio	Inv. at Cost	Mkt. Vol.	Unreal.0/L	Unreal.0/L(%)	xmm(x.)		mi.XIR(%)
				Equity - Mutual Fund	40.00	99.43	208.47	148.84	248.77	15.85		18.28
				Debt - Mutual Fund	58.87	17.00	10.58	141.40	82.61	2.47		7.83
				Portfolio Total	100.00	231.62	521.26	290.24	125.63	3.84		9.62
			*N4	ote : 1) Holdings of F&O, Commodities 2) XIRR(%) and Benchmark XIRR(%	and Currencies are excluded. ;) are shown only for Gold Bond	9.						
My Portfolio										🗄 Gen	erate Summa	ary Report
Asset Class		% of Portfolio	inv. at Cost	Mkt. Val.	Divider	vd	Unreal. G/L	Unreal. G/L (%)	,	URR (%)	Bm	nk.XIRR(%)
✓ Equity		40.03	59.83	208.67			148.84	248.77		13.83		13.21
✓ Multi Asset				-		-	-	-		-		-
~ Debt		59.97	171.18	212.59		-	141.40	82.61		7.47		7.53
✓ Alternate (Quoted)			-				-					-
~ Cash			-			-				-		-
Sub-Total (Excl. Alterne	eta Unquoted)	88.00	10.00	52.28			100.24	105.45		0.04		8.62
 Attemate (inquoted) 												
Portfolio Total		100.00	221.02	52.25			280.24	105.40		5.84		9.62

Note : Income is inclusive of Dividend, Interest, Other income, Exempted Income, Interest and Capital Repayment as declared by Manufacturer

Happy Investing!