

Client Portal Quick Help Document

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



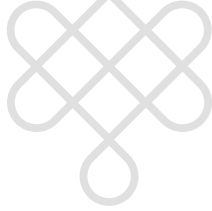
Media



Our Blog



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



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Let's now take a look at your investments!

On the Homepage please click on the Login tab.

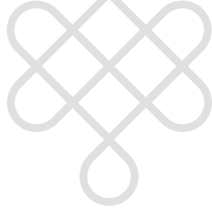


A Login window pops up.



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.



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

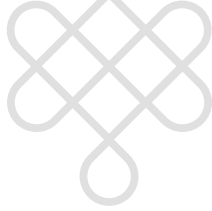
Click on New User option on the login screen.



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.

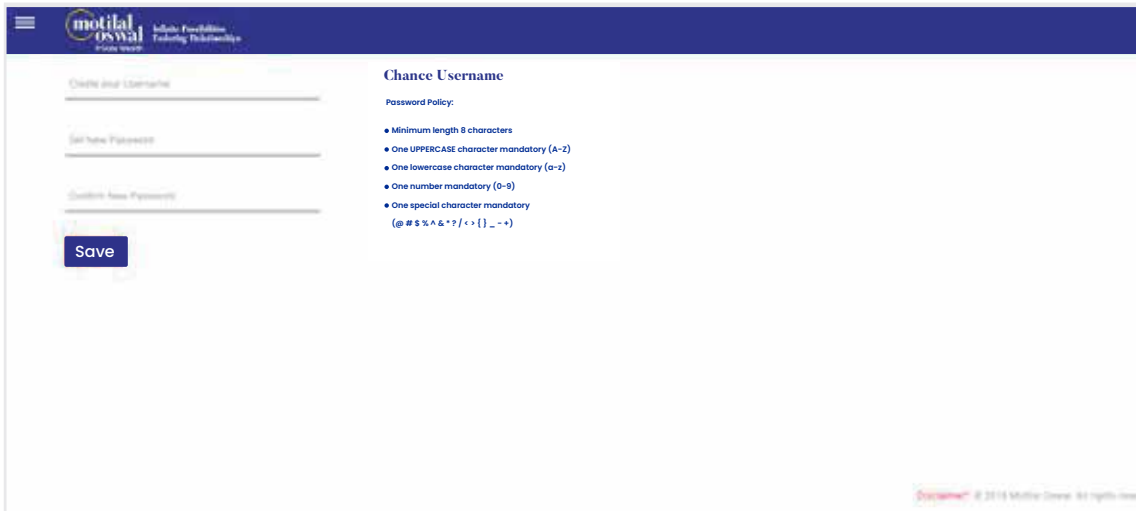


Once you have entered the details, please click on Send OTP. You will receive the OTP on your registered email address and mobile number. Please see that this OTP is valid for 30 minutes only. In case you have not received OTP, you can request to resend OTP after 5 minutes.

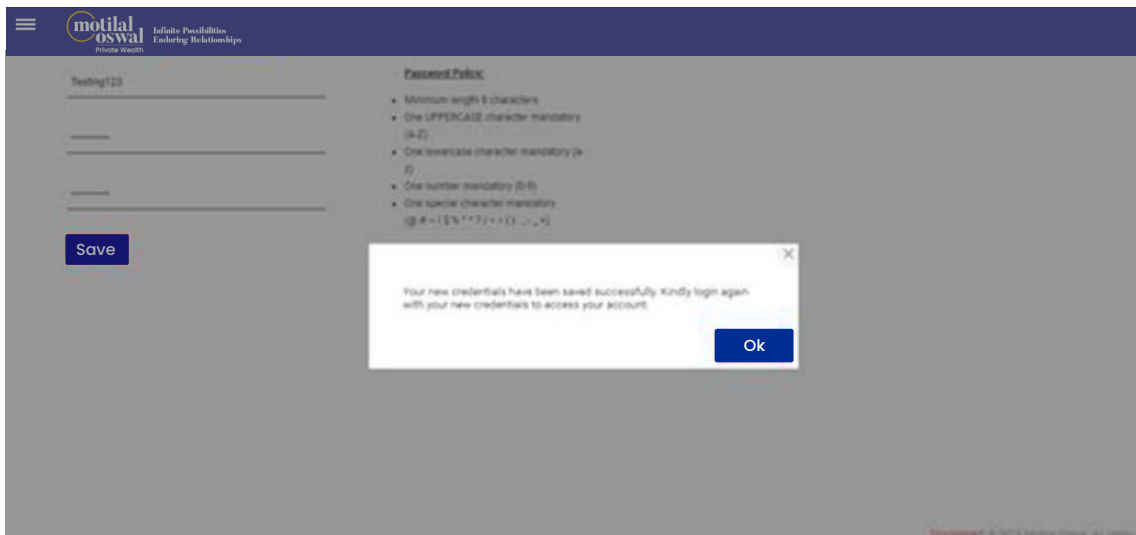


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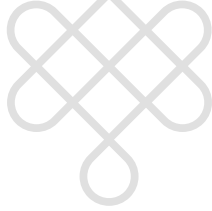
Once you enter the OTP, the system will take you to a screen to setup your new username & password. Password policy is mentioned beside for your reference.



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



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



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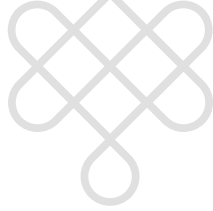
2. If you have forgotten your Username

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



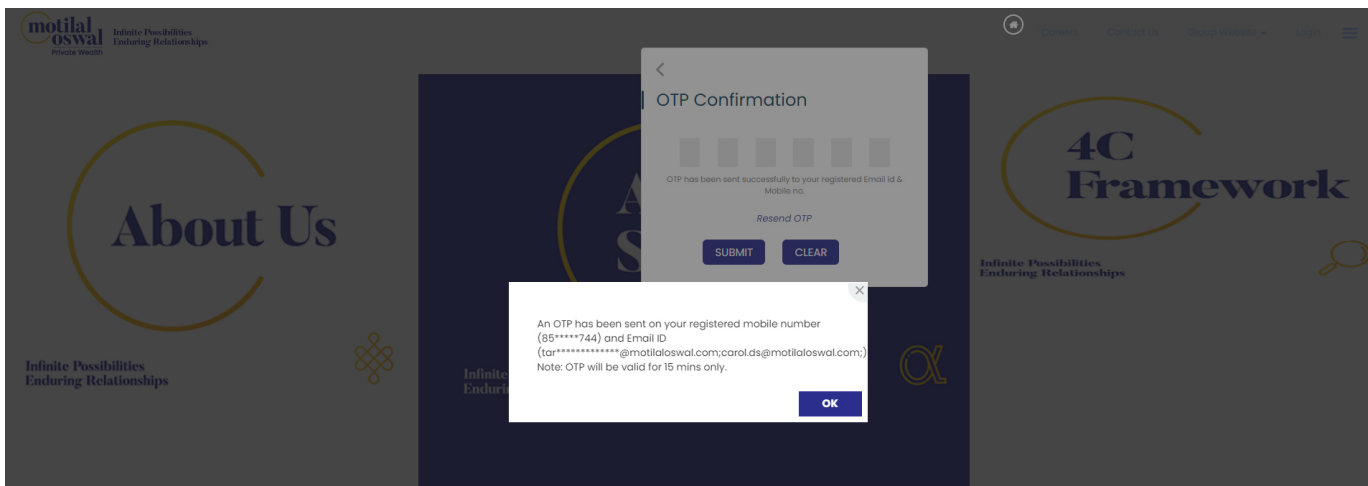
Click on **Forgot Username** option on the login screen.



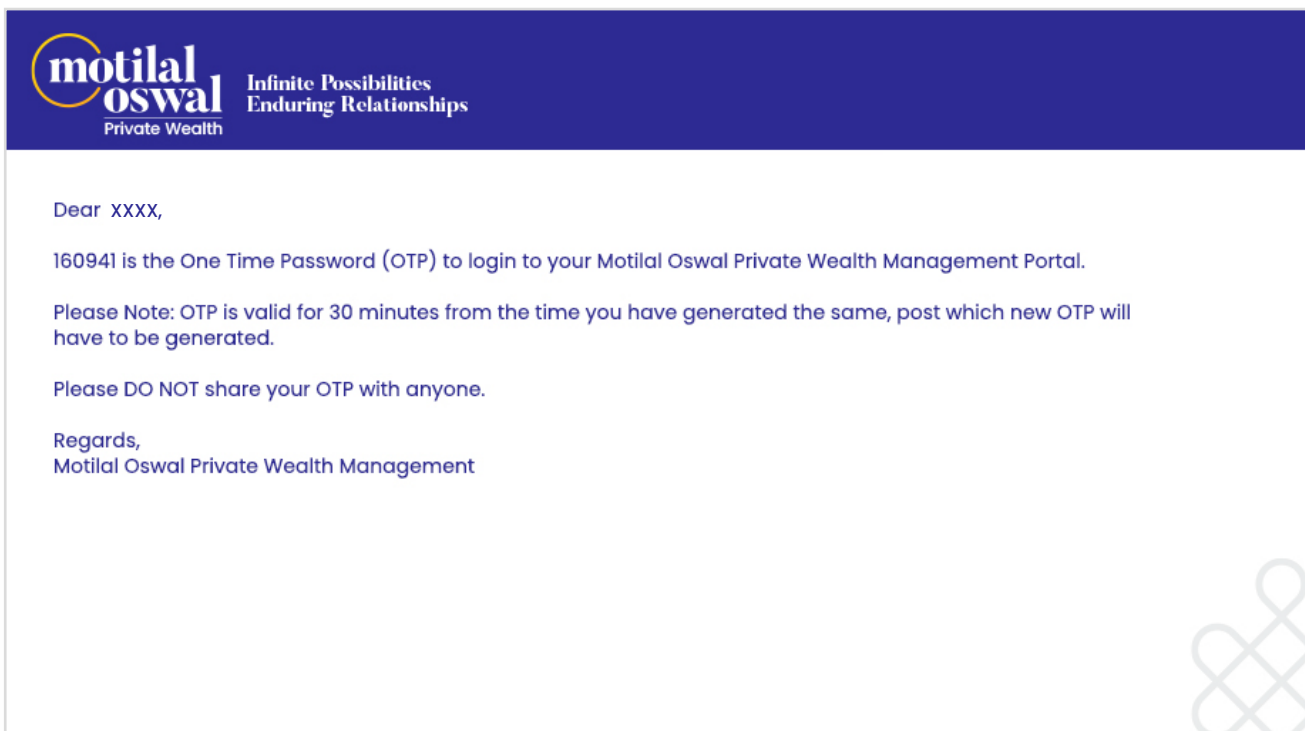


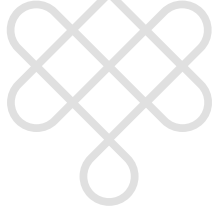
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You will be prompted to enter your registered mobile number or email address followed by your PAN card registered with us/Date of Birth. In case if it's a non-individual/company account, date of incorporation would have to be entered. After you have 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.



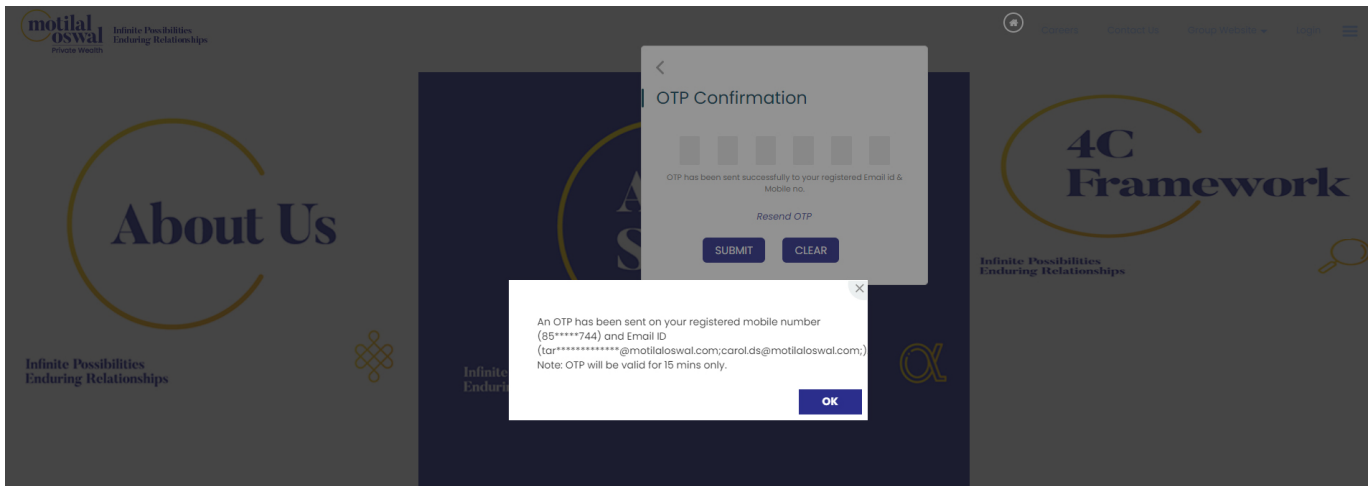
Once you enter the OTP, your username and client code would be sent to your email and mobile number.





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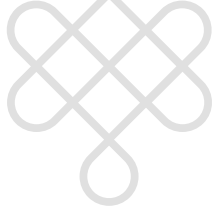
Once you enter the OTP, your username and client code would be sent to your email and mobile number.



3. If you have forgotten your Password

Click on **Forgot Password?** Option on the login screen

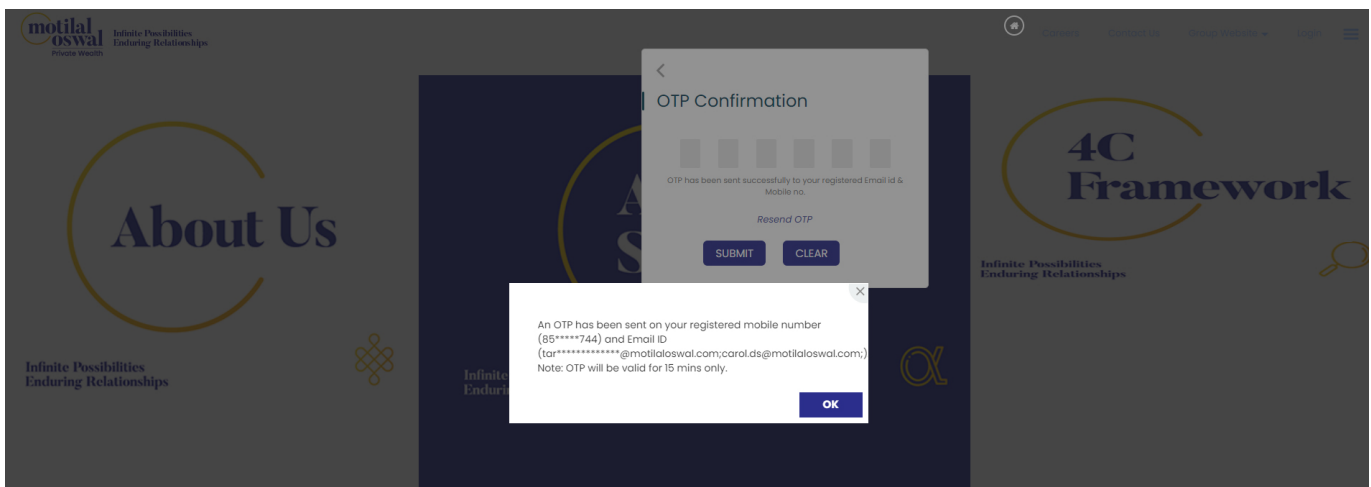




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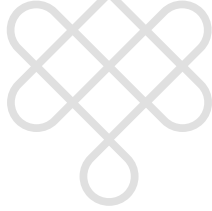
You will be prompted to enter your username or Client code followed by your registered mobile number/email address and your PAN card registered with us/Date of Birth in the third field. In case if it's a non-individual/company account, date of incorporation would have to be entered.

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.



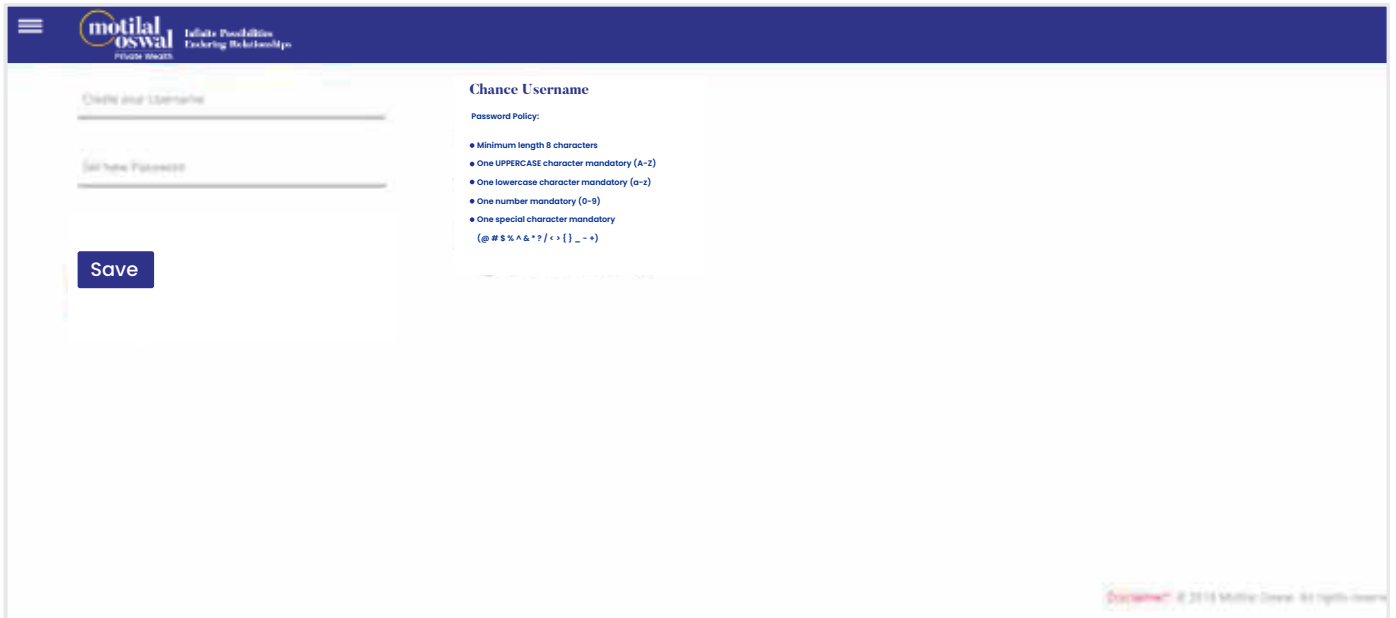
Please enter the OTP as prompted.





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

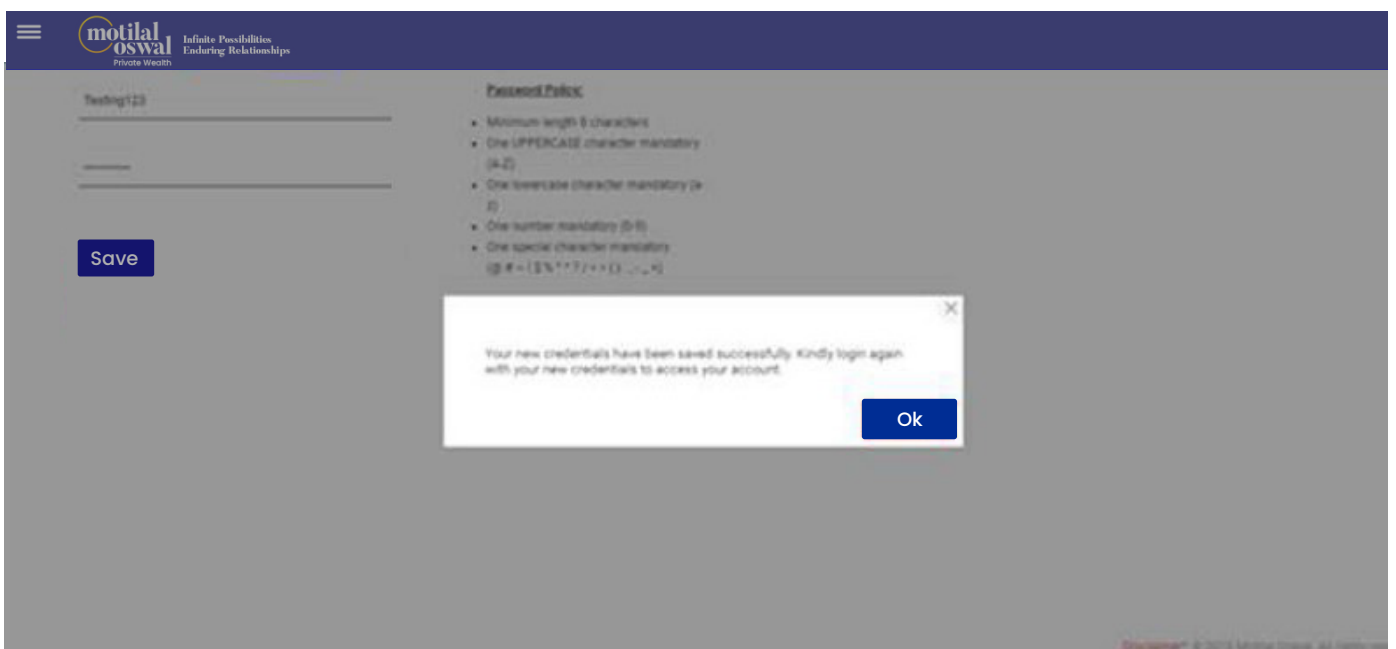


The screenshot shows the Motilal Oswal Client Portal interface. On the left, there are input fields for 'Old Password' and 'New Password', with a 'Save' button below them. On the right, under the heading 'Change Username', there is a 'Password Policy' section listing the following requirements:

- 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 (e.g. # \$ % ^ & * ? / < > { } _ - +)

At the bottom right of the page, there is a small copyright notice: 'Disclaimer © 2018 Motilal Oswal. All rights reserved.'

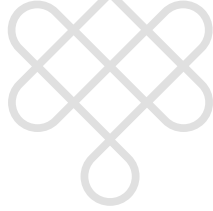
Once you have entered the new password, you will be prompted to login again.



This screenshot shows the same Motilal Oswal Client Portal interface as the previous one, but with a modal dialog box displayed in the center. The dialog box contains the following text:

Your new credentials have been saved successfully. Kindly login again with your new credentials to access your account.

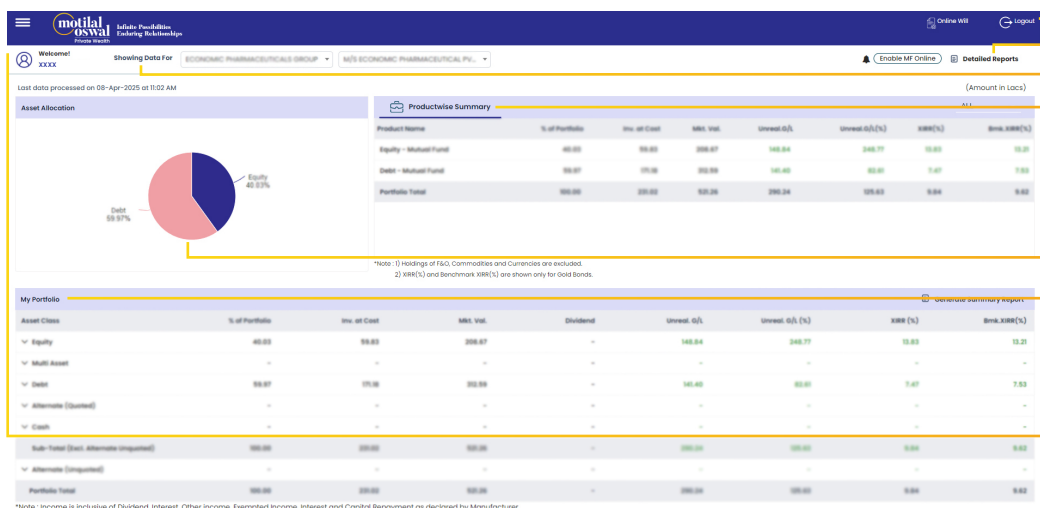
Below the text is an 'Ok' button. The background of the portal is dimmed. The same 'Password Policy' section is visible on the right side of the screen.



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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.

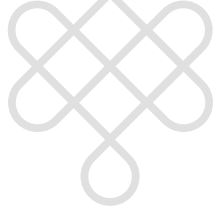


- Logout button
- PDF reports can be generated from here
- User can select family & clients for whom he wants to view the report
- Dashboard shows the Product wise summary
- Dashboard shows the Family Member wise summary
- Dashboard shows the Asset allocation
- Multi level view of portfolio (Asset class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



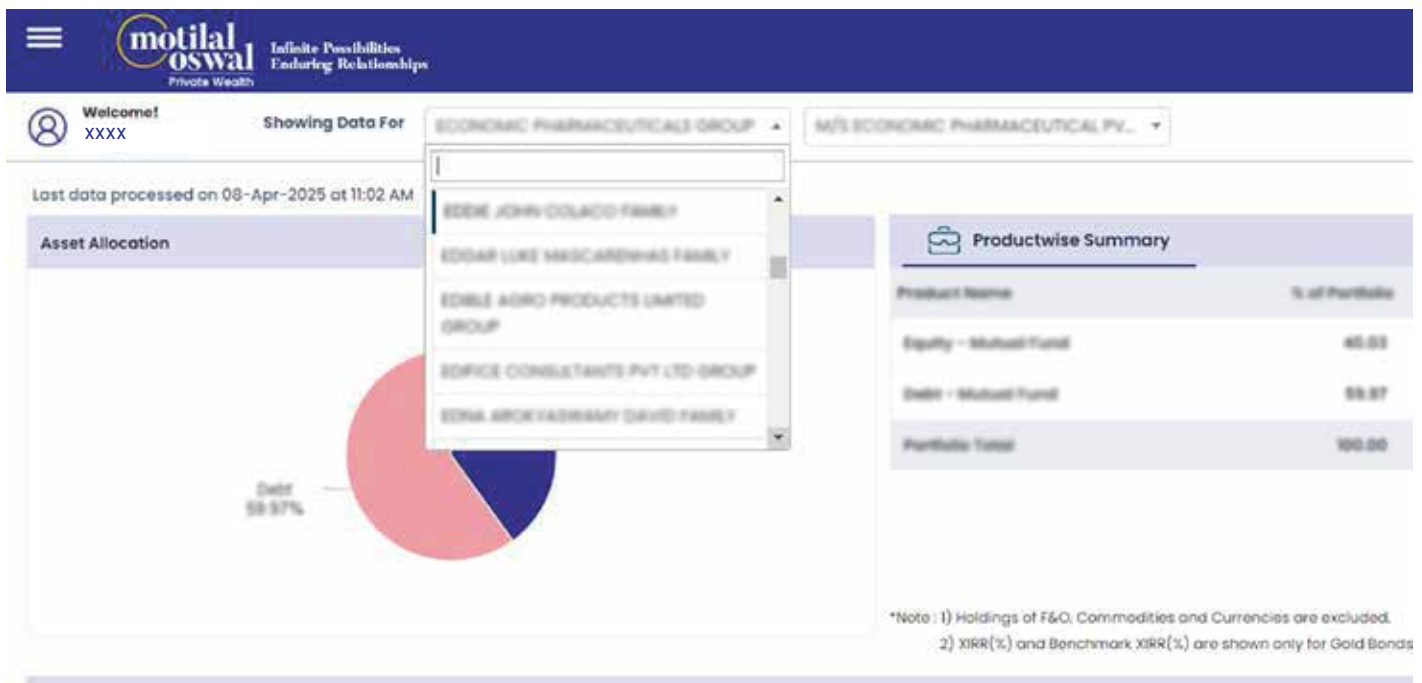
P.S.: You can only change the username and password. For all other changes/correction please get in touch with your Relationship Manager.



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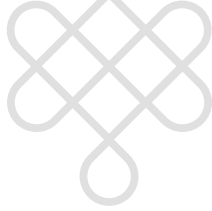
Reports:

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.

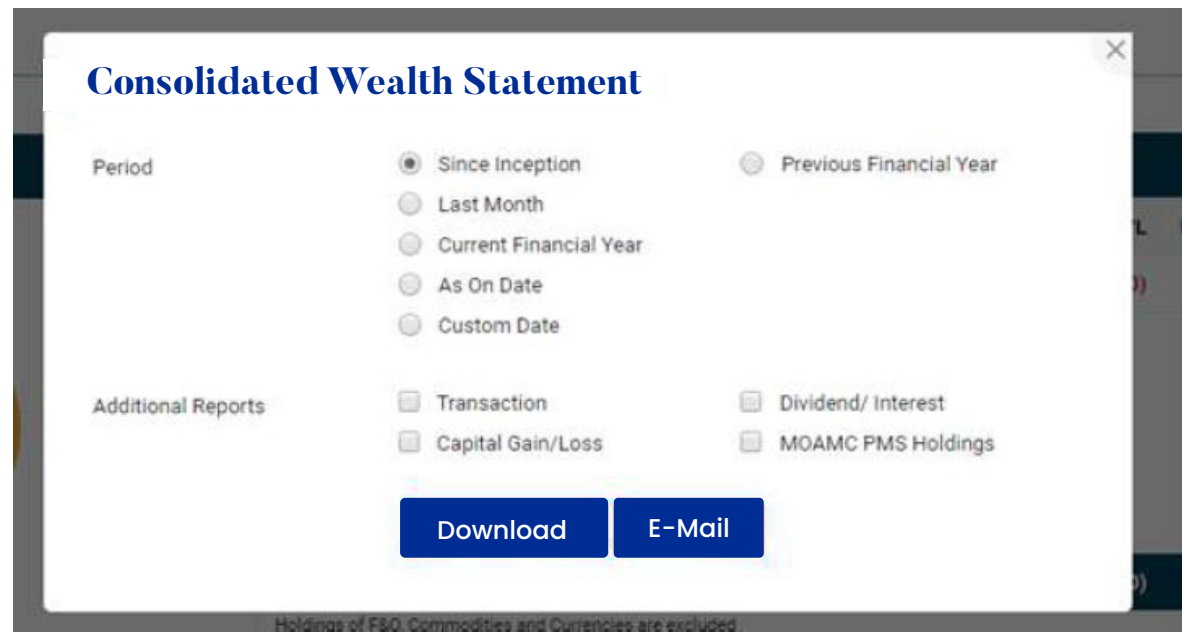


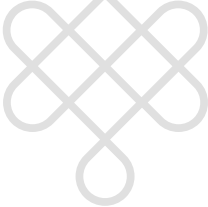
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The **Detailed Reports** section gives you an option of the following links.



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





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

motilal
oswal

Infinite Possibilities
Enduring Relationships

Private Wealth

Online Will

Logout

XXXX

Showing Data For

ECONOMIC PHARMACEUTICALS GROUP

M/S ECONOMIC PHARMACEUTICAL PV.,

Enable MF Online

Detailed Reports

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

Asset Allocation

Debt 59.97%

Equity 40.03%

Productwise Summary

ALL

Product Name	% of Portfolio	Inv. at Cost	Mkt. Val.	Unreal. G/L	Unreal. G/L (%)	XIRR (%)	Bmk.XIRR (%)
Equity - Mutual Fund	40.03	59.83	208.87	148.84	248.77	13.83	13.21
Debt - Mutual Fund	59.97	171.36	312.59	141.40	82.81	7.47	7.53
Portfolio Total	100.00	231.19	521.46	290.24	125.63	9.84	9.82

*Note - 1) Holdings of F&O, Commodities and Currencies are excluded.

2) XIRR(%) and Benchmark XIRR(%) are shown only for Gold Bonds.

My Portfolio

Generate Summary Report

Asset Class	% of Portfolio	Inv. at Cost	Mkt. Val.	Dividend	Unreal. G/L	Unreal. G/L (%)	XIRR (%)	Bmk.XIRR (%)
Equity	40.03	59.83	208.87	-	148.84	248.77	13.83	13.21
Multi Asset	-	-	-	-	-	-	-	-
Debt	59.97	171.36	312.59	-	141.40	82.81	7.47	7.53
Alternate (Quoted)	-	-	-	-	-	-	-	-
Cash	-	-	-	-	-	-	-	-
Sub-Total (Excl. Alternate (unquoted))	100.00	231.19	521.46	-	290.24	125.63	9.84	9.82
Alternate (Unquoted)	-	-	-	-	-	-	-	-
Portfolio Total	100.00	231.19	521.46	-	290.24	125.63	9.84	9.82

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

Happy Investing!