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USER GUIDE

1. Login

Once the installation of Investmentz app is complete, you will need to create your login credentials by completing the First Time Login .You would have received your client code in an email from Investmentz.

1.1. First Time Login

Step 1: Click on First Time Login highlighted in the image below.

INVESTMENTZ
INVESTOR FIRST
BY ASIT C. MEHTA INVESTMENT INTERMEDIATES LTD.

WELCOME TO INVESTMENTZ
Login to continue

Login Id [Forgot Login Id?](#)

Password [Forgot password?](#)

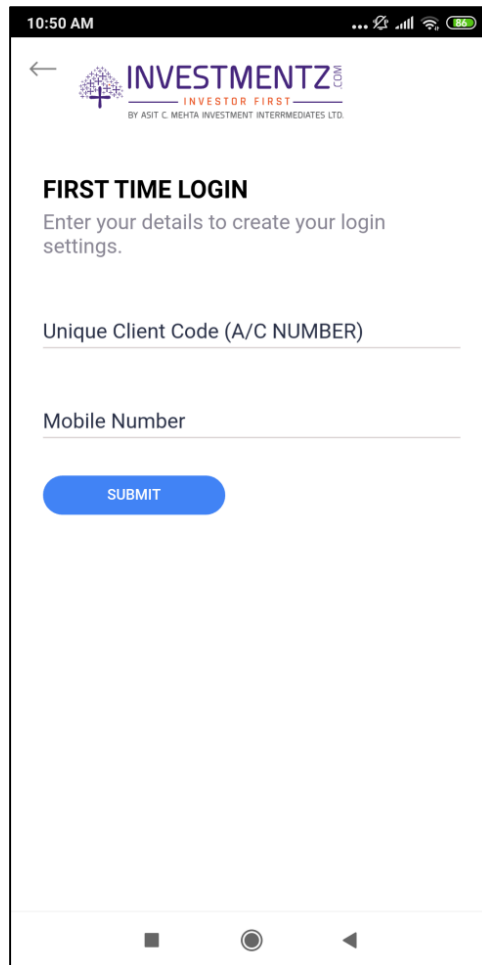
LOGIN

Don't have an Investmentz Account ?
[OPEN AN ACCOUNT](#)

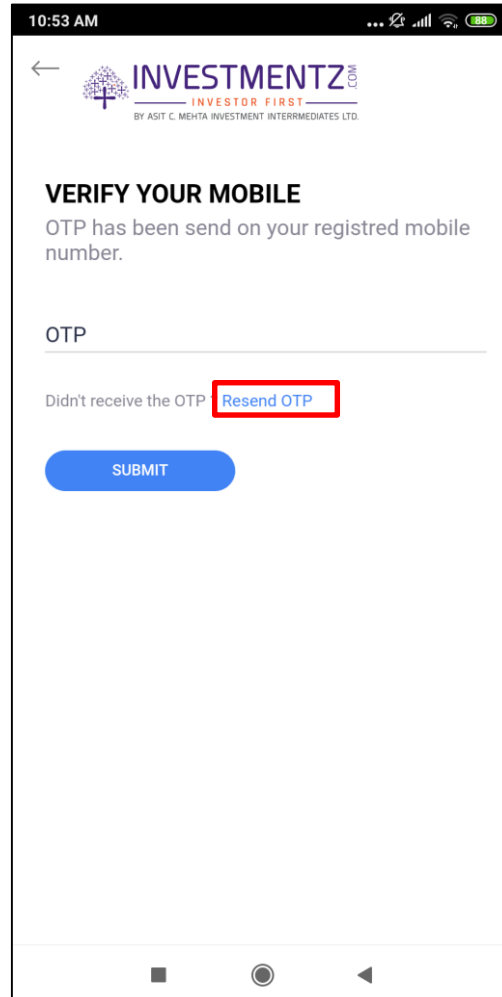
Already have Investmentz Account ?
[FIRST TIME LOGIN \(FOR NEW USER\)](#)

[BOOK A DEMO](#)

Step 2: You will have to enter the UCC (unique client code) which you would have received in an email from Investmentz.. After entering UCC you are required to enter the registered mobile number on which you will receive a 6 digit OTP as shown in the image below:

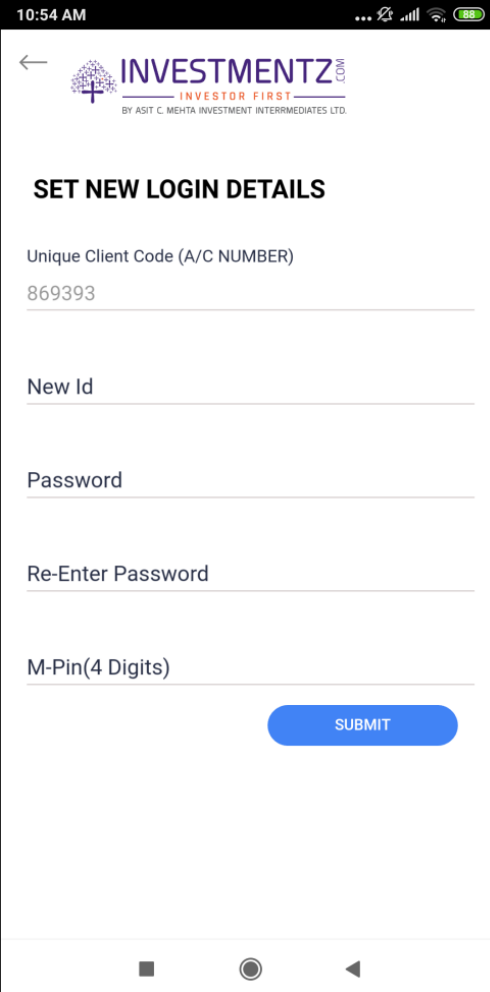


Step 3 : Enter the 6 digit OTP which you have received on your registered mobile number. The OTP will be valid for 3 minutes(180 seconds).If you haven't received the OTP then you can click on Resend OTP to receive the OTP



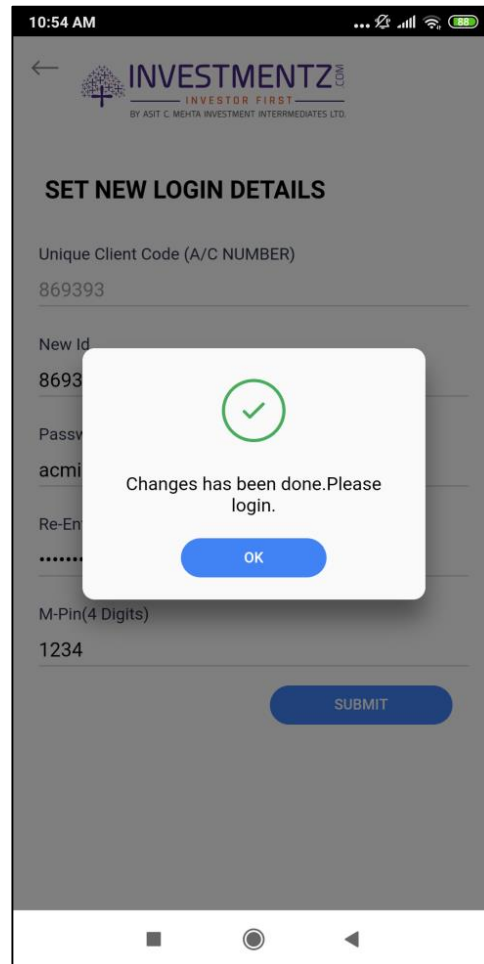
Step 4 : Investmentz allow its users to create their own Login Id. A password needs to be set by you, first letter of password should start with alphabet only which should be 8-15 string Alphanumeric, you have to re-enter the same password for confirmation.

As you can see investmentz has a secure login for which it follows two factor authentication. You need to enter a 4 digit M-Pin which will be asked to you every time you login in Investmentz. Look at the image below:

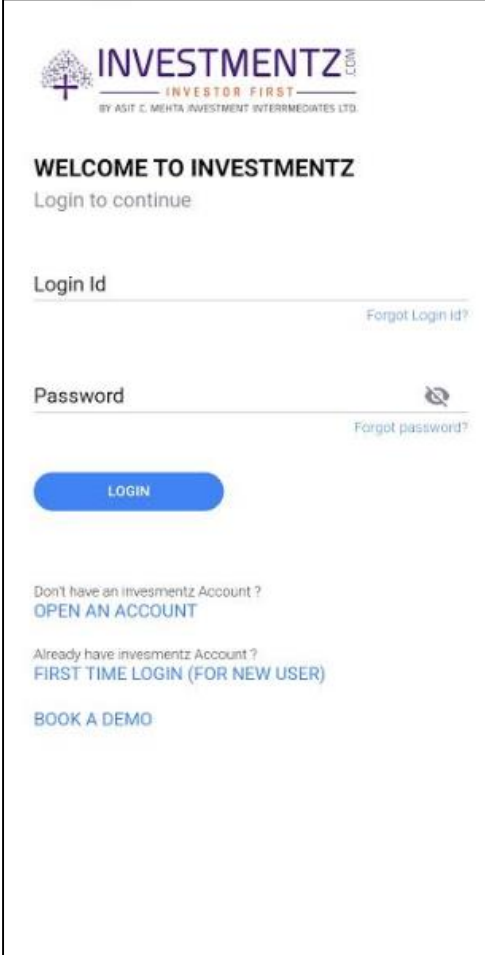


The image shows a mobile application interface for 'INVESTMENTZ.COM'. The screen is titled 'SET NEW LOGIN DETAILS'. At the top, there is a back arrow and the company logo with the tagline 'INVESTOR FIRST' and 'BY ASIT C. MEHTA INVESTMENT INTERMEDIATES LTD.'. Below the title, there are five input fields: 'Unique Client Code (A/C NUMBER)' with the value '869393', 'New Id', 'Password', 'Re-Enter Password', and 'M-Pin(4 Digits)'. A blue 'SUBMIT' button is located at the bottom right of the form area. The status bar at the top shows the time as 10:54 AM and various connectivity icons.

Step 5 : After entering the required fields a successful message will pop up as shown in the image below:

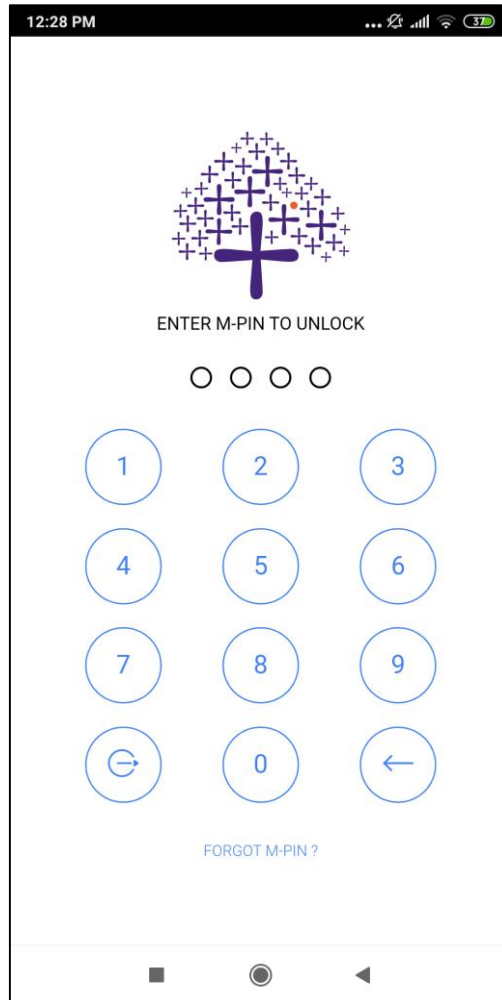


Step 6: After completing the First Time Login process, you can login to the Investmentz App, where you have to enter the Login Id and password which was created by you in First Time Login process and click on login. Look at the image below:

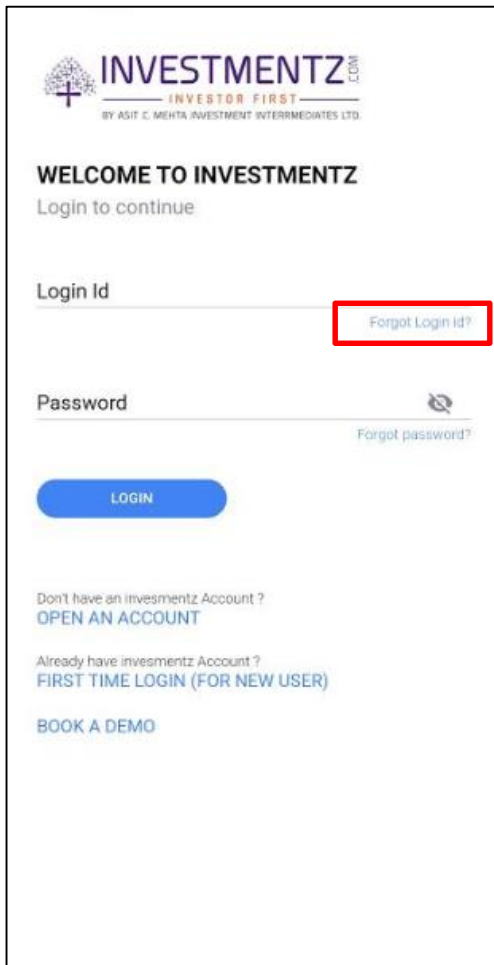


The image shows the login interface for the Investmentz app. At the top, there is the Investmentz logo with the tagline "INVESTOR FIRST" and "BY ASIT C. MEHTA INVESTMENT INTERMEDIATES LTD.". Below the logo, the text reads "WELCOME TO INVESTMENTZ" and "Login to continue". There are two input fields: "Login Id" and "Password". Each field has a "Forgot" link next to it: "Forgot Login id?" and "Forgot password?". A blue "LOGIN" button is positioned below the password field. At the bottom, there are three links: "Don't have an Investmentz Account? OPEN AN ACCOUNT", "Already have Investmentz Account? FIRST TIME LOGIN (FOR NEW USER)", and "BOOK A DEMO".

Step 7: As an authentication measure, you now have to enter the 4 digit M-Pin which was created in First Time Login process and after entering the M-pin you will be login



1.2. Forgot Login ID



INVESTMENTZ
INVESTOR FIRST
BY ASIF C. MEHTA INVESTMENT INTERMEDIATES LTD.

WELCOME TO INVESTMENTZ
Login to continue

Login Id [Forgot Login Id?](#)

Password [Forgot password?](#)

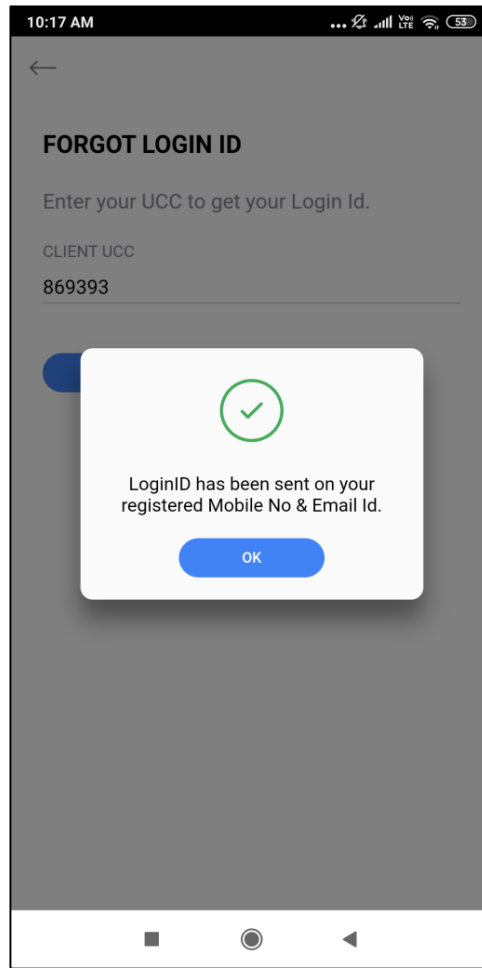
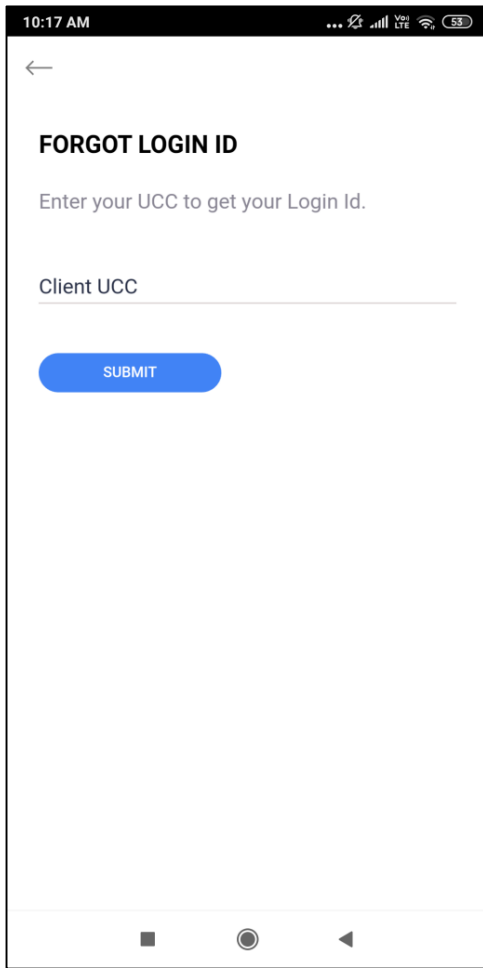
LOGIN

Don't have an Investmentz Account ?
[OPEN AN ACCOUNT](#)

Already have Investmentz Account ?
[FIRST TIME LOGIN \(FOR NEW USER\)](#)

[BOOK A DEMO](#)

Your Login ID is the unique ID, using which you can login across all Investmentz trading platforms. If you've forgotten your Login ID click on forgot Login Id after which you will land on Forgot Login Id screen.



Enter your UCC which you have received first time via email from Investmentz.

After entering login Id you will get popup as shown in the above image.

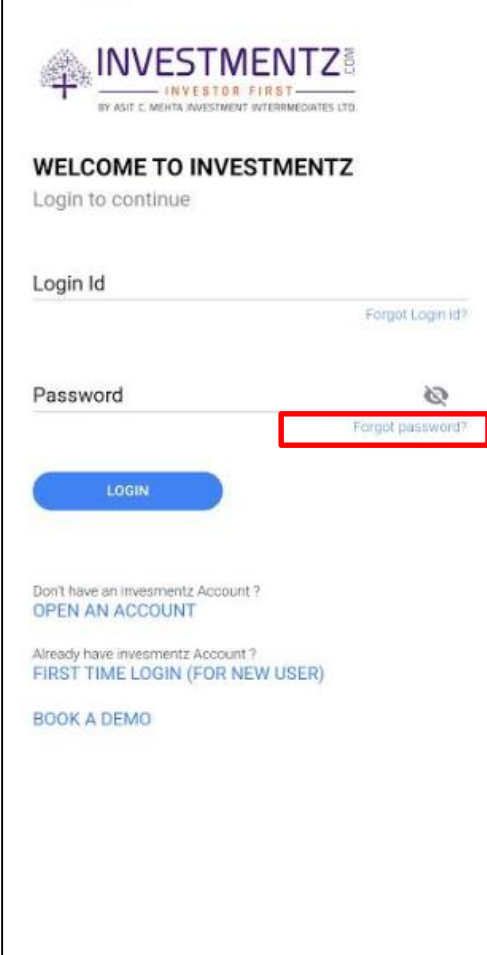
You will receive Login id on your registered email & mobile no.

Enter the Login id , password & continue with trading.

1.3. Forgot Password

If you've entered your password incorrectly 3 times and you try logging with the incorrect details for the fourth time, your account will be locked. You can reset your password by following the steps mentioned below:

Step 1 : Click on Forgot password? shown in the image below:



The image shows the login page for Investmentz. At the top, there is a logo for INVESTMENTZ.COM with the tagline 'INVESTOR FIRST' and 'BY ASIF C. MEHTA INVESTMENT INTERMEDIATES LTD.'. Below the logo, it says 'WELCOME TO INVESTMENTZ' and 'Login to continue'. There are two input fields: 'Login Id' and 'Password'. To the right of the 'Login Id' field is a link 'Forgot Login Id?'. To the right of the 'Password' field is a link 'Forgot password?' which is highlighted with a red rectangular box. Below the input fields is a blue 'LOGIN' button. At the bottom, there are three links: 'Don't have an Investmentz Account? OPEN AN ACCOUNT', 'Already have Investmentz Account? FIRST TIME LOGIN (FOR NEW USER)', and 'BOOK A DEMO'.

Step 2 : Enter the login id and the registered mobile number and click on submit as shown in the image below:

10:56 AM

← **INVESTMENTZ**.COM
INVESTOR FIRST
BY ASIT C. MEHTA INVESTMENT INTERMEDIATES LTD.

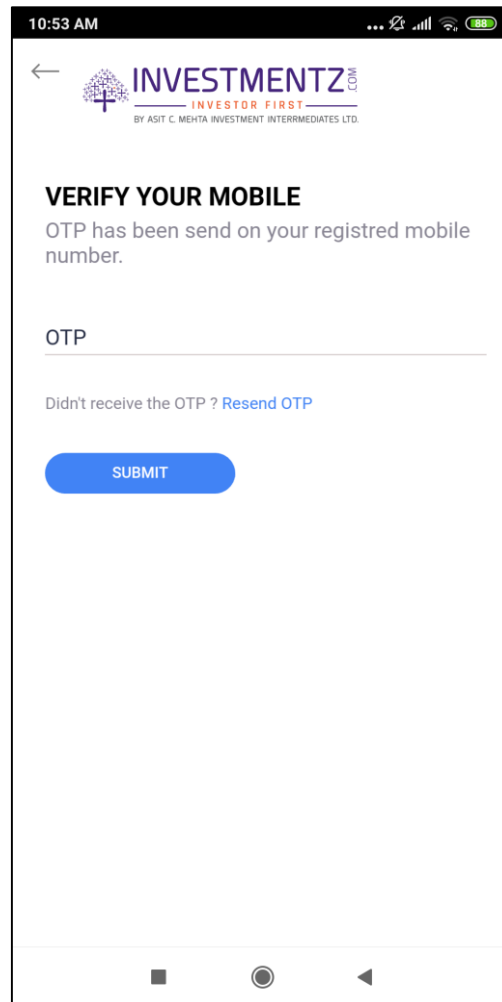
FORGOT PASSWORD
Enter your details to reset your password.

Login ID

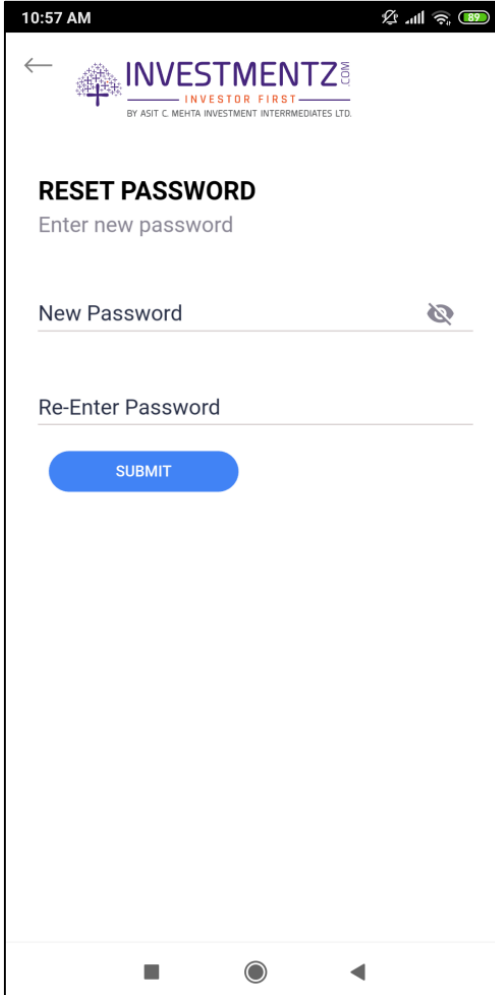
Mobile Number

SUBMIT

Step 3 : Enter the 6 digit OTP which you have received on your registered mobile number. The OTP will be valid for 3 minutes(180 seconds).If you haven't received the OTP then you can click on Resend OTP to receive the OTP.




Step 4 : You can now create a new 8-15 string alphanumeric password.
First letter of password should start with alphabet only. For confirmation you have to re-enter the password.



10:57 AM

← **INVESTMENTZ**.COM
INVESTOR FIRST
BY ASIT C. MEHTA INVESTMENT INTERMEDIATES LTD.

RESET PASSWORD
Enter new password

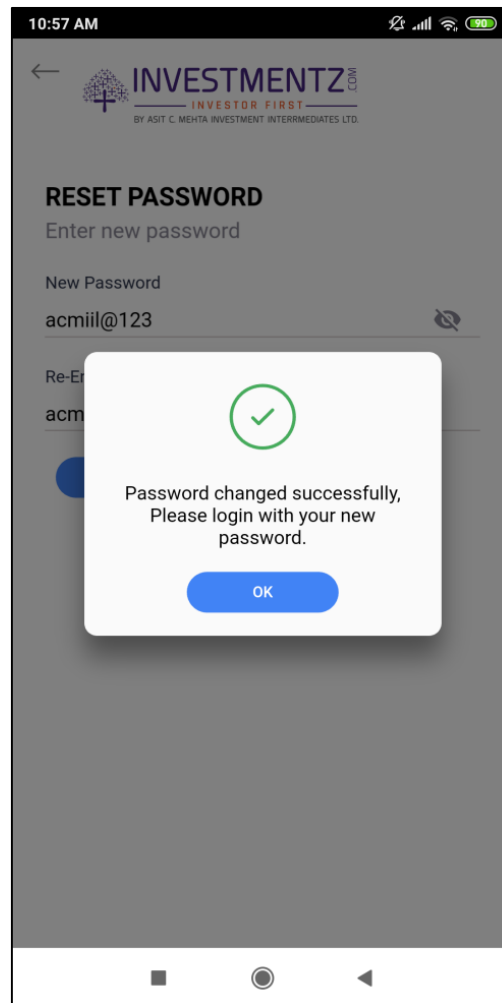
New Password 

Re-Enter Password

SUBMIT

Step 5 : A confirmation message will pop up on creating a new password successfully.

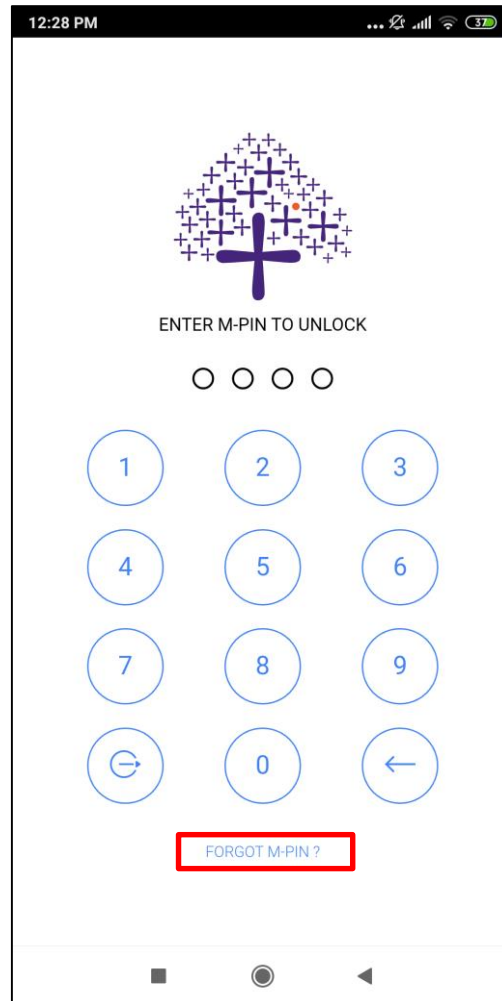
Look at the image below.



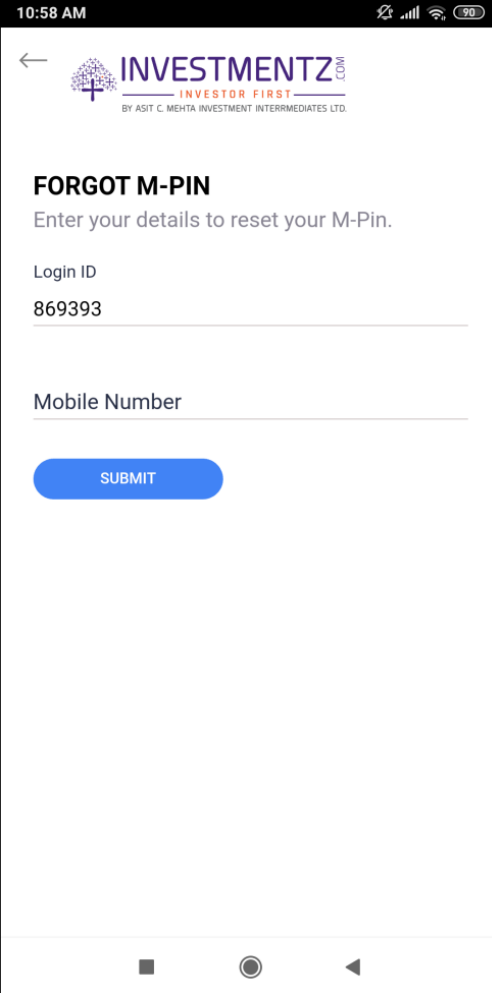
1.4. Forgot M-pin

If you have forgotten the two factor authentication M-Pin you will not be able to login. You can reset your M-PIN by following the steps mentioned below:

Step 1 : Click on Forgot M-Pin? As shown in the image below.



Step 2 : After clicking on forgot M-pin you will be asked to enter the Login id and the registered mobile number as shown in the image below :



10:58 AM

← **INVESTMENTZ**.COM
INVESTOR FIRST
BY ASIT C. MEHTA INVESTMENT INTERMEDIATES LTD.

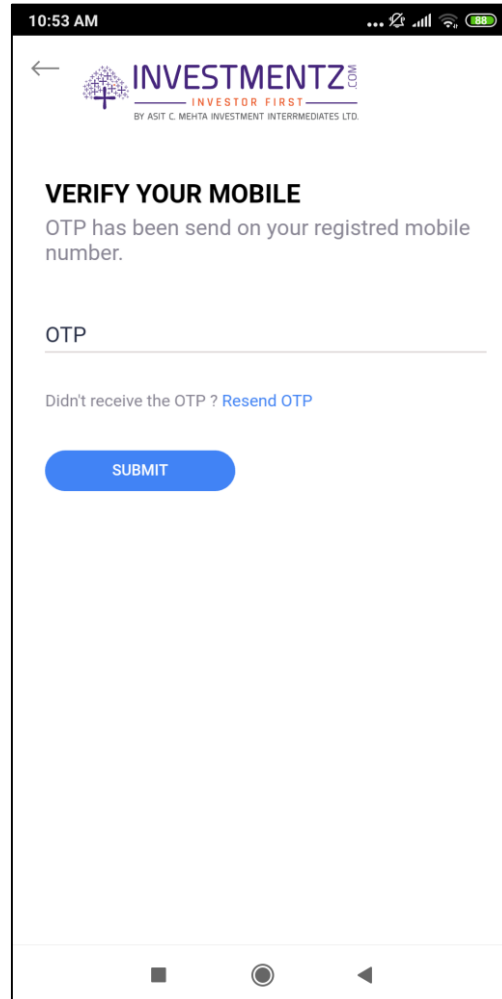
FORGOT M-PIN
Enter your details to reset your M-Pin.

Login ID
869393

Mobile Number

SUBMIT

Step 3: Enter the 6 digit OTP which you have received on your registered mobile number. The OTP will be valid for 3 minutes(180 seconds).If you haven't received the OTP then you can click on Resend OTP to receive the OTP



Step 4 : You can now create a new M-Pin & it should be of four digits only. For confirmation you have to re-enter the M-Pin.

10:59 AM

← **INVESTMENTZ**.COM
INVESTOR FIRST
BY ASIT C. MEHTA INVESTMENT INTERMEDIATES LTD.

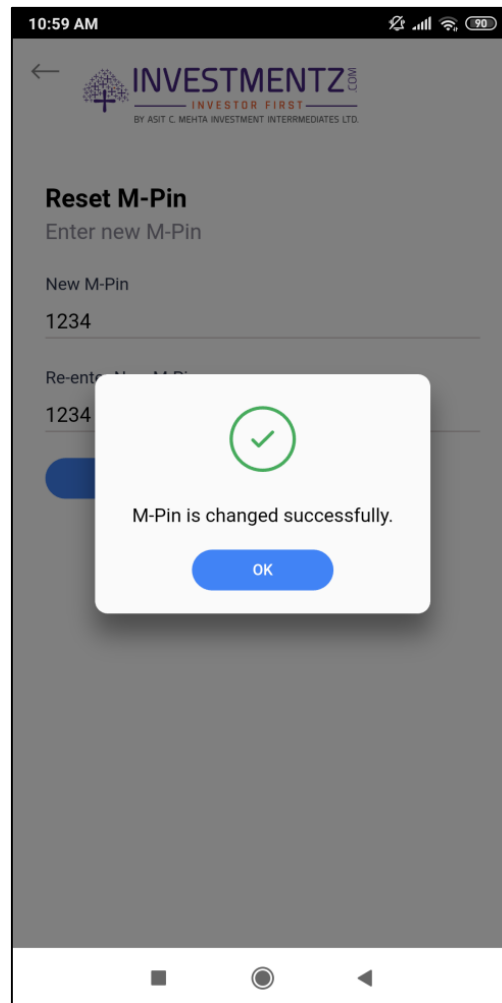
Reset M-Pin
Enter new M-Pin

New M-Pin

Re-enter New M-Pin

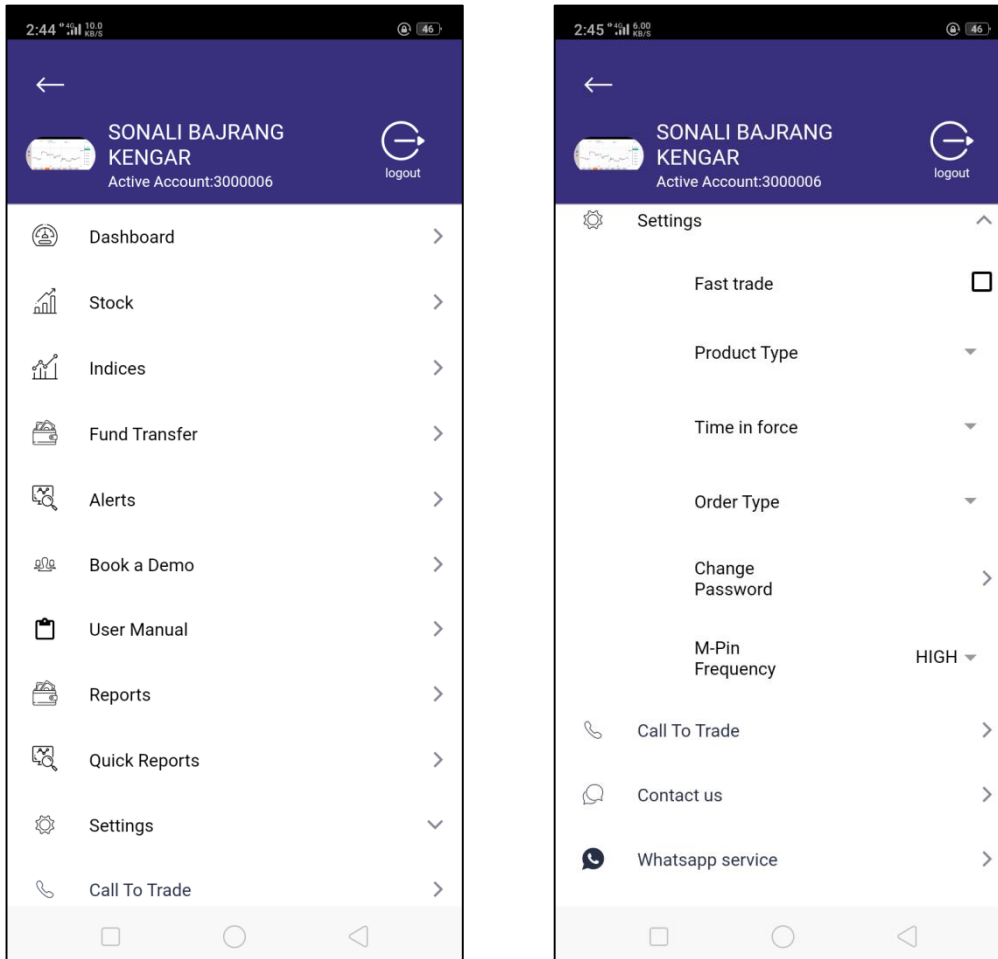
SUBMIT

Step 5 : A confirmation message will pop up on creating a new M-Pin successfully.



2. Menu

User will have access to all important links from the menu and on clicking on more you will have access to detailed Menu.



You can view all the links from menu and to change the general and trading settings click on setting and the following options will be shown:

- **Fast trade**

You can set fast trade as default and you will not be asked for the trade confirmation while trading.

- **Product type**

On selection of MIS or CNC you can set product type as default for all the order screens.

- **Time in force**

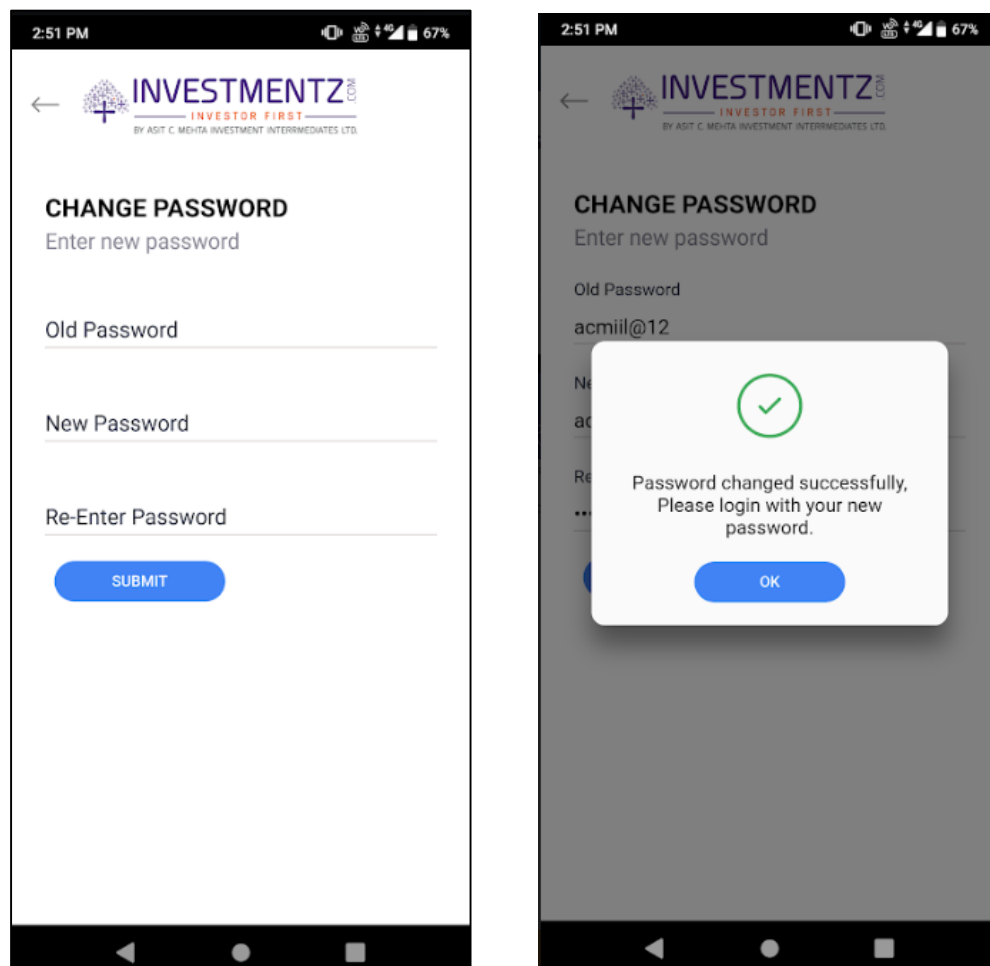
On selection of Day or IOC you can set time in force as default for all order screens.

- **Order type**

You can set the Order type as default for all the order screens.

- **Change Password**

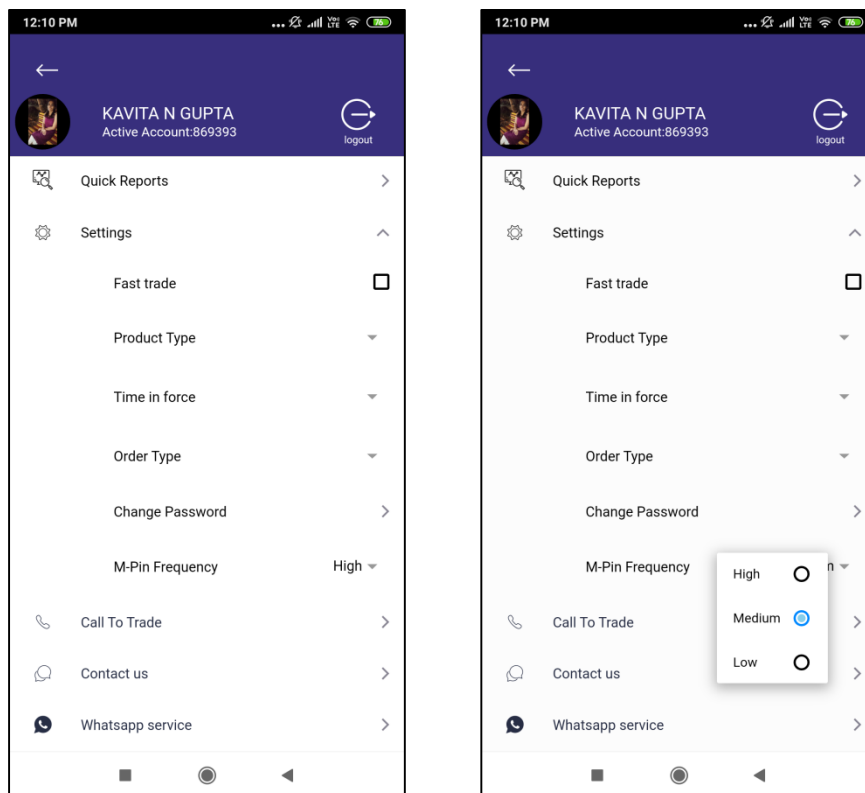
To reset password click on change password and you will land on change password screen as shown in the image below:



After the password is changed a pop up will be shown and you have to login with the new password

M-pin frequency

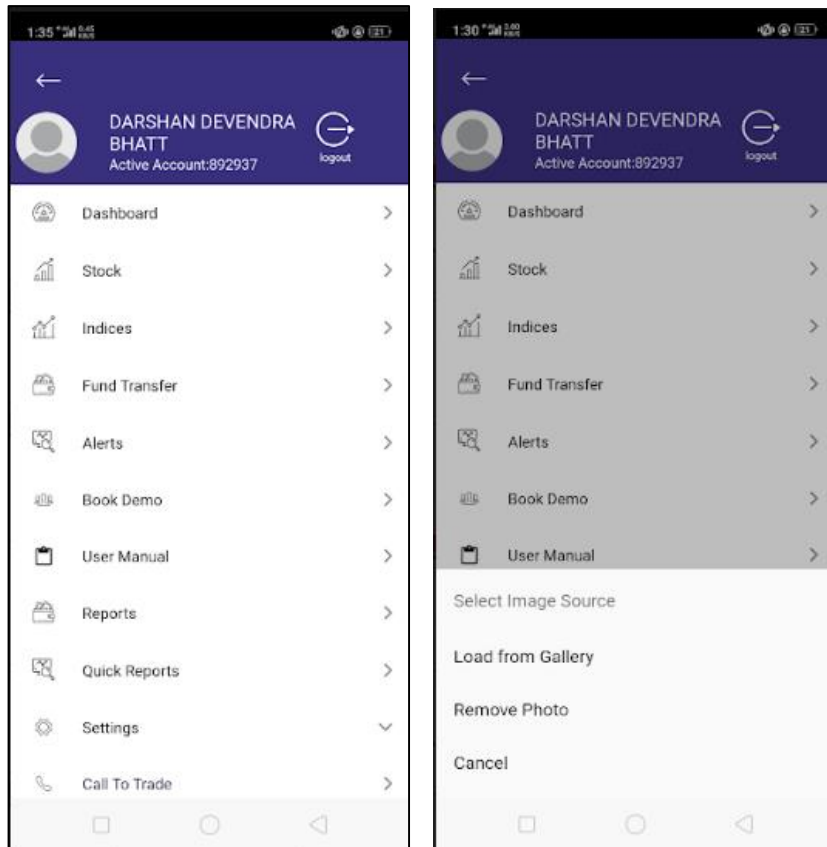
- From menubar click on more option.
- Under settings click on M-pin frequency
- You will get drop down option to choose M-pin frequency as high, medium & low
- Choose the frequency type which you want
- **High:** M-pin will be asked on killing app,switching app
- **Medium:** M-pin will be asked on killing app & when you switch app for 5 min it will be asked
- **Low:** M-pin will be asked on killing app



Note: For high & medium If the app is not used or kept idle for 5 min the M-pin will be asked

Add Profile Photo

- Go to menubar
- Click on more option
- Under “Profile,” tap your current profile picture.
- You will get drop down option to choose & remove photo from gallery.



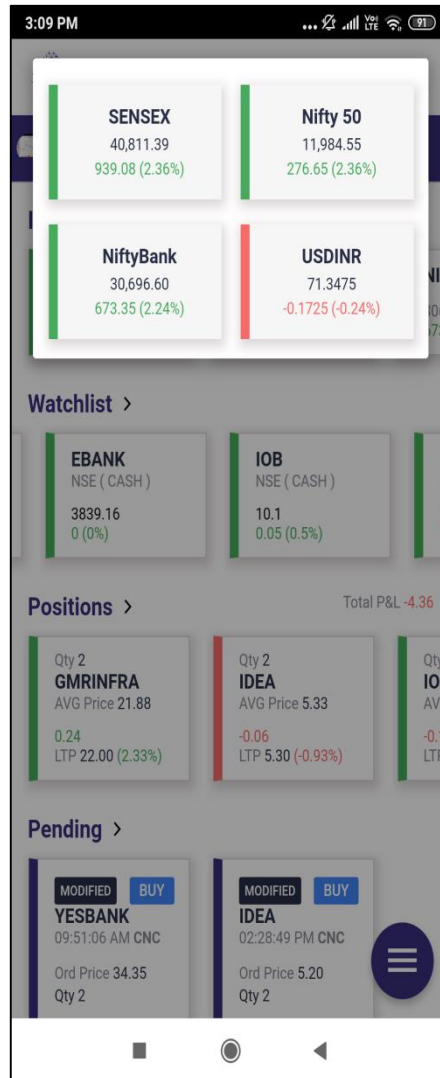
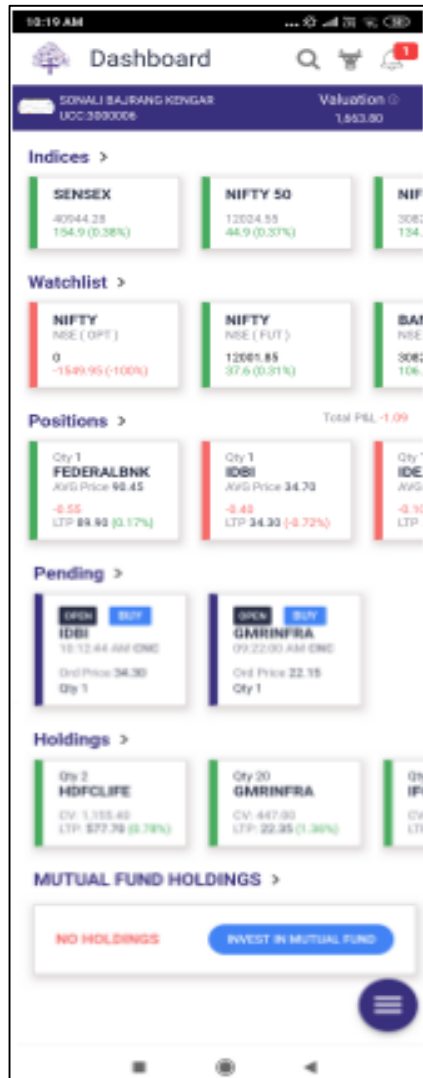
3. Dashboard

It gives a summary of the clients Portfolio. It shows the Valuation as per demat quantity, Profit/Loss as per net quantity, Positions, Holdings, Completed & Pending order done for the day. Also you can check with mutual fund holdings .

You can view the watchlist created by you and the Market Indices.

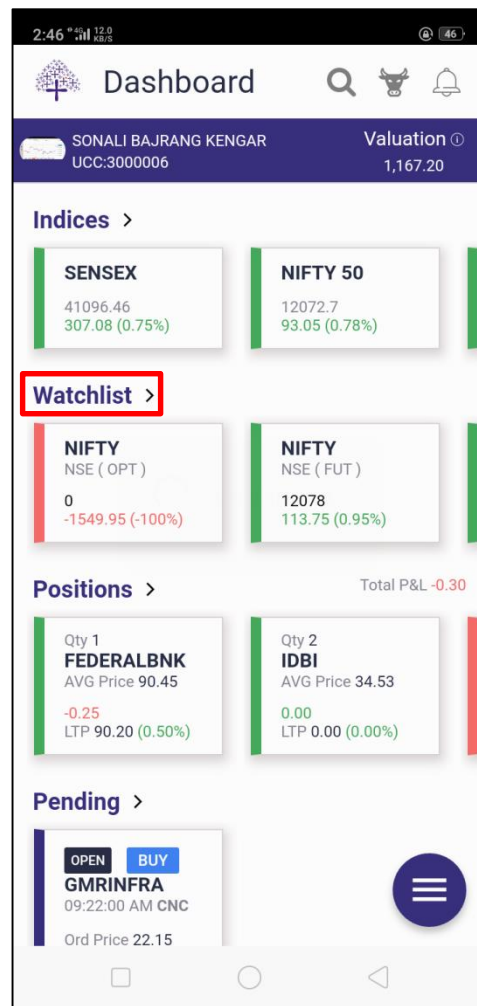
1. To view Indices i.e SENSEX, NIFTY50, NIFTYBANK & USDINR , click on the bull icon given on the header .

2. The Indices will be visible from the major screens of the app.



4. Watchlist

A watchlist is the screen where you can add scrips of your choice and track live prices of the same. You can use these watchlist to monitor specific stocks that you are interested in, across different sectors and industries. You can click on the scrip in the market watch to see detail information of a scrip.

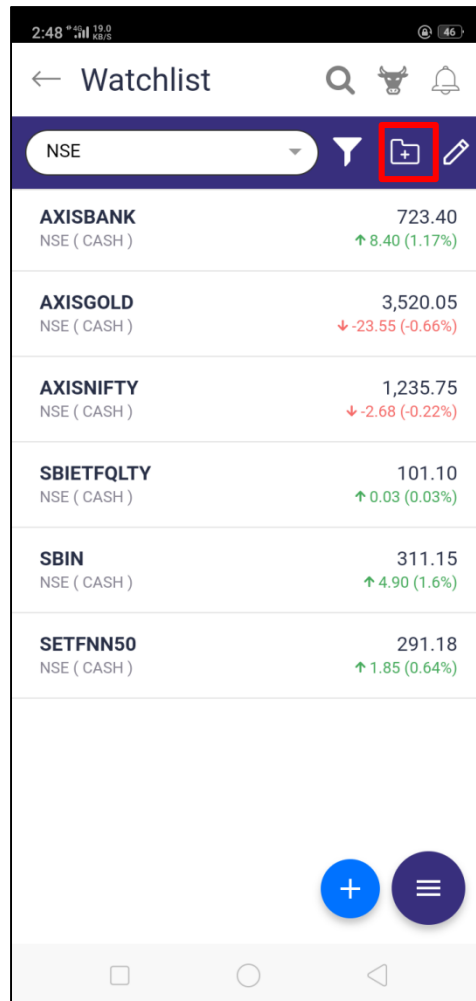


4.1. Add Scrips

From dashboard click on watchlist

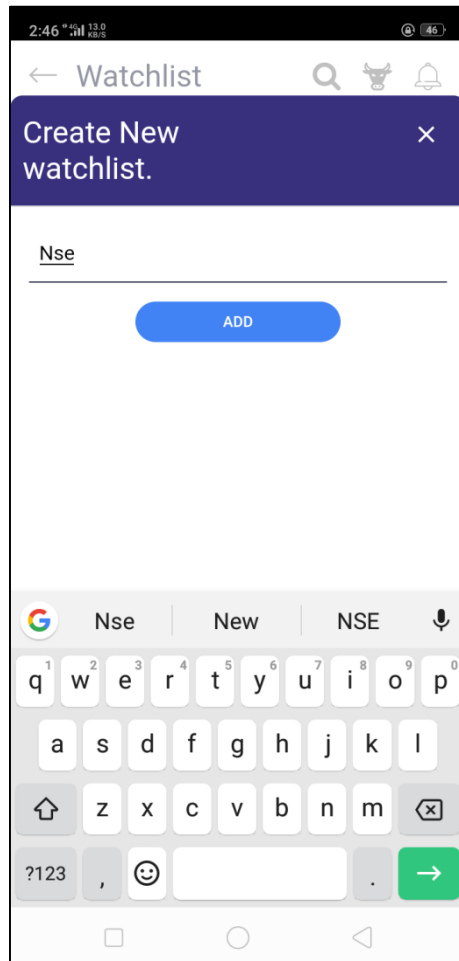
You can create new watchlist and add scrips in them in following manner:

Step 1 : To create a new watchlist, click on “Folder”.

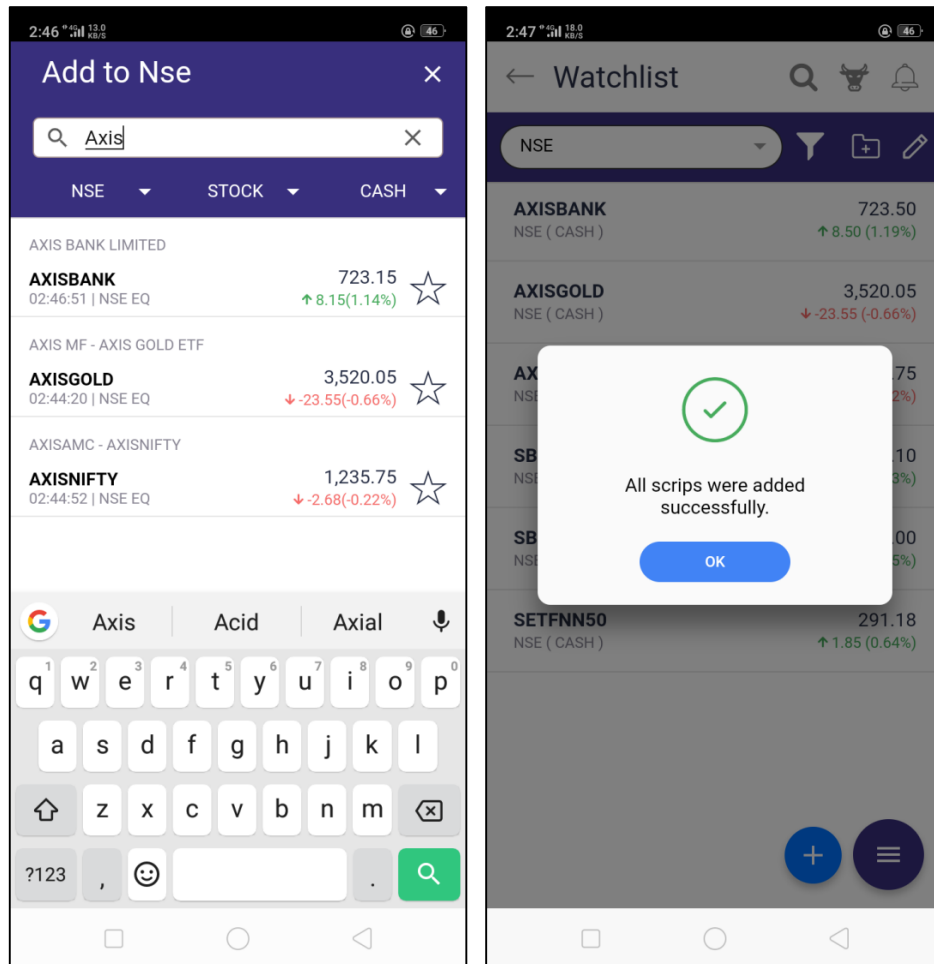


Step 2: Enter the name of watchlist and click on add.

Your watchlist will be created after adding the scrips into watchlist.



Step 3: Select the exchange & market segment of your choice then search which ever scrip you want in the search bar. For example, to add Axis bank type axis bank select the Axis scrip and click on star icon your scrip will get added successfully & you will get a successful popup on screen.

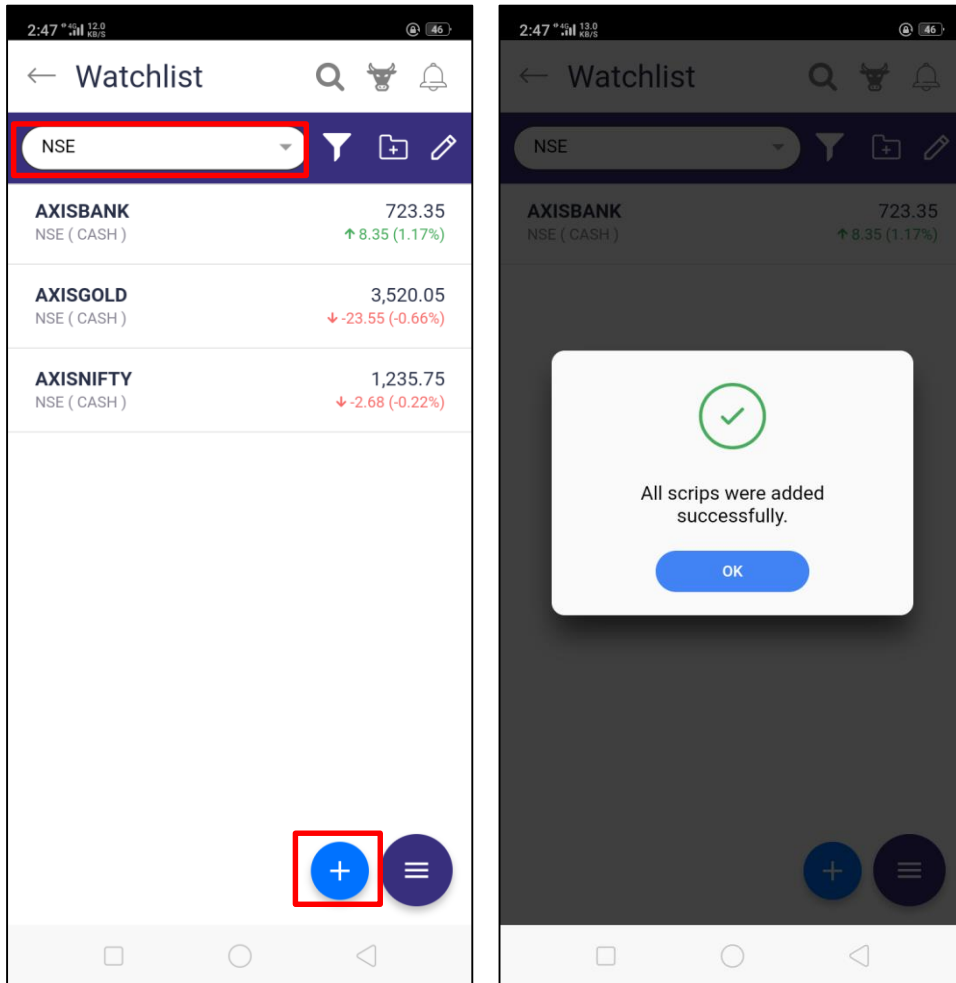


To Add scrip in existing watchlist

When you want to add scrip in the existing watchlist select the watchlist from drop down in which you want to add. Name.

After which click on “+” as shown in the image below.

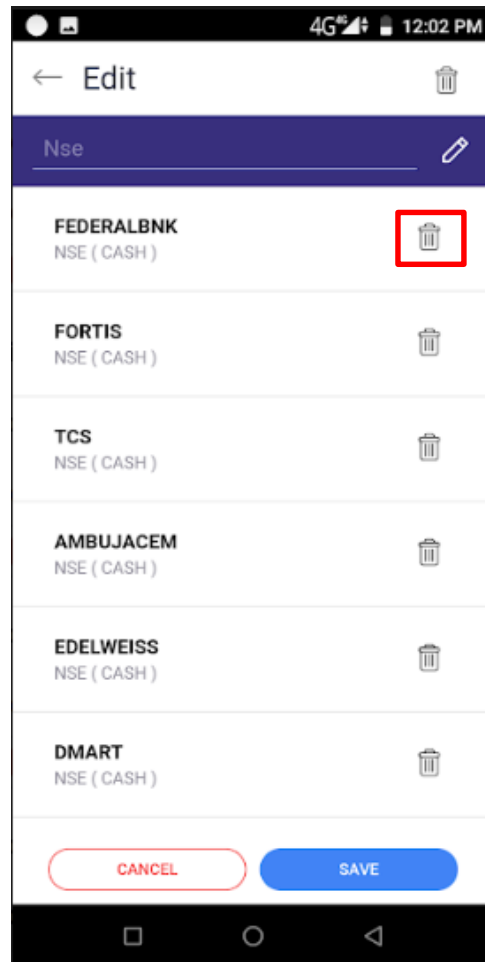
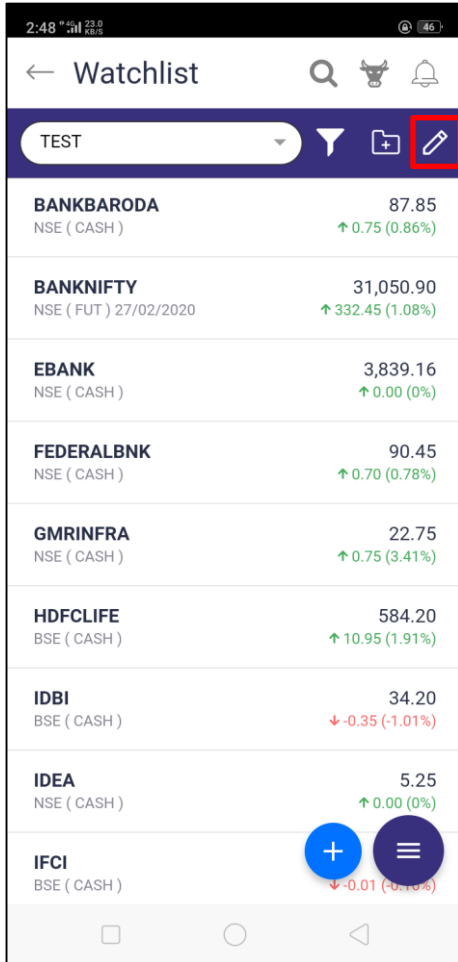
Search for the scrip in the search bar & click on star Icon your scrip will get added successfully.



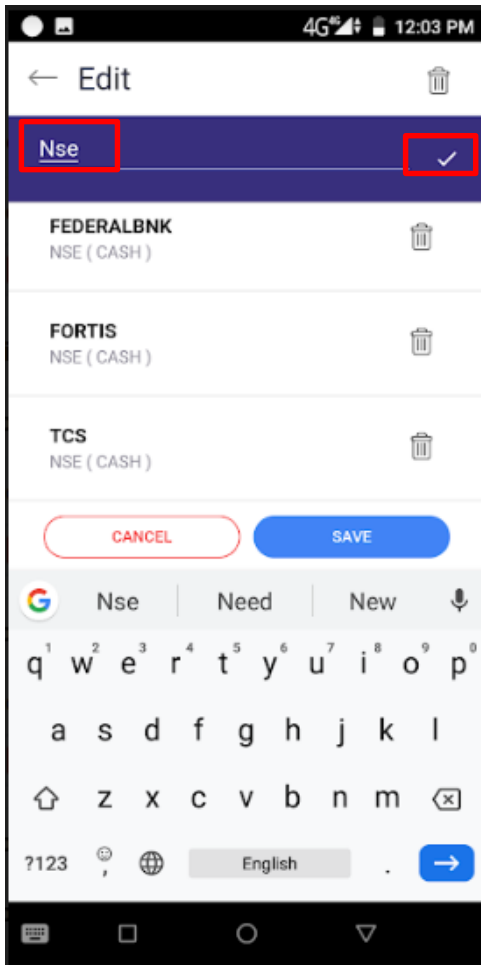
4.2. Delete Scrips

When you want to delete scrip from the existing watchlist select particular watchlist from drop down option & click on edit icon.

Now click on delete icon & save your scrip will be deleted successfully.



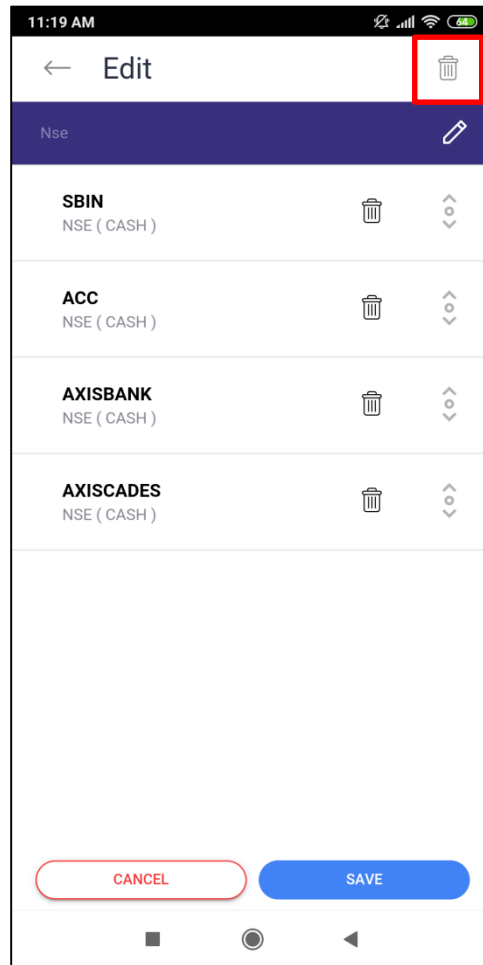
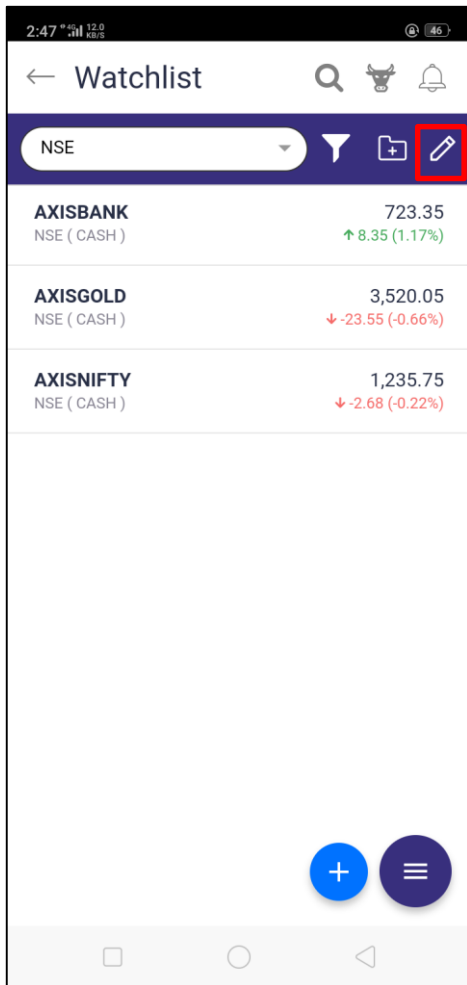
To rename enter the name you want to keep and then click on tick mark to save.



4.3. Delete Watchlist

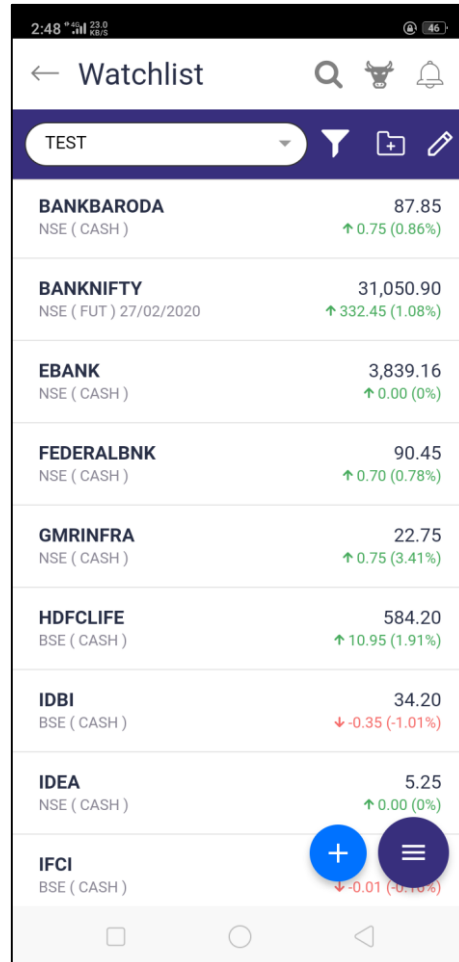
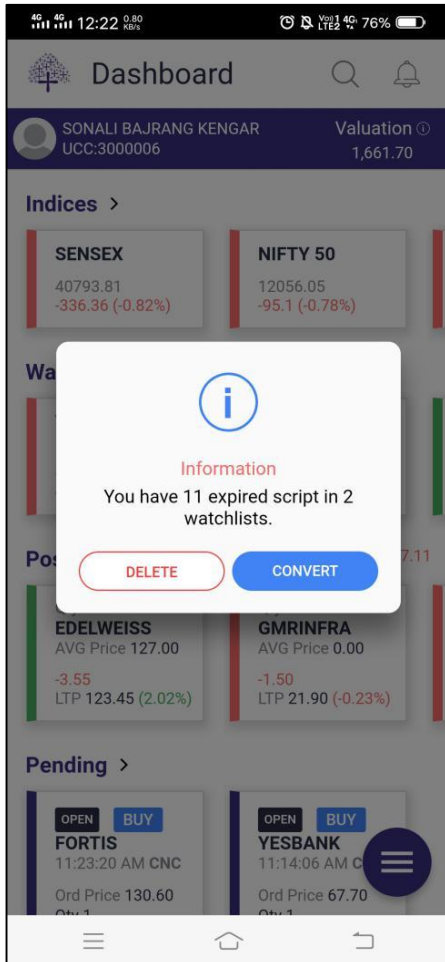
When you want to delete watchlist select the particular watchlist from drop down option after which click on edit icon.

Edit screen will appear click on delete icon available at top of screen and your watchlist will be deleted successfully.



4.4. Delete or convert future / option scrips to next expiry

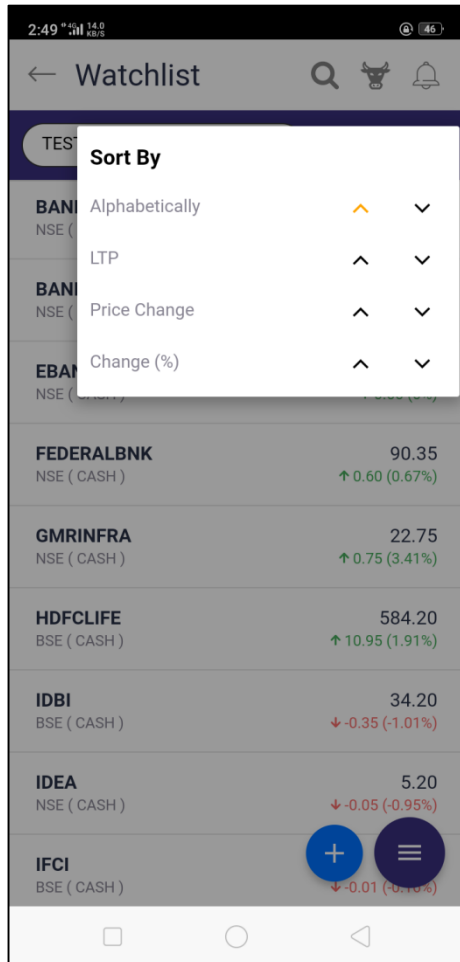
If your watchlist contain future/ option scrip you will get a popup on dashboard screen which are already expired you can simply delete or convert to next expiry date



4.5. Sorting Scrips in Watchlist

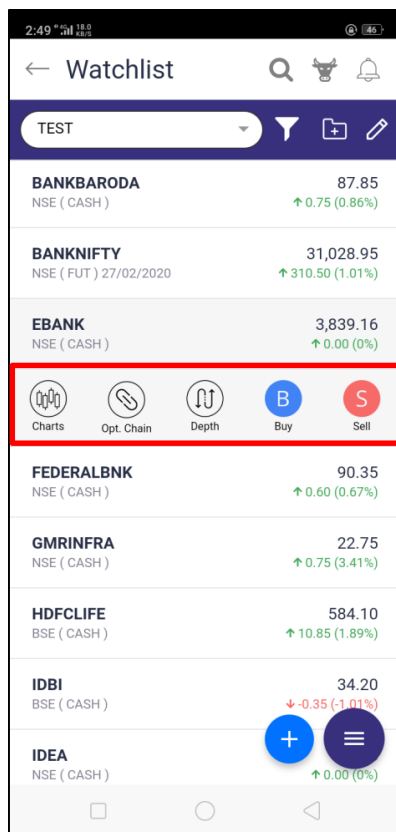
You can sort scrip in the following order i.e. Alphabetically, Price ,Change and % change.

from drop down option as per your choice as shown in the image below.



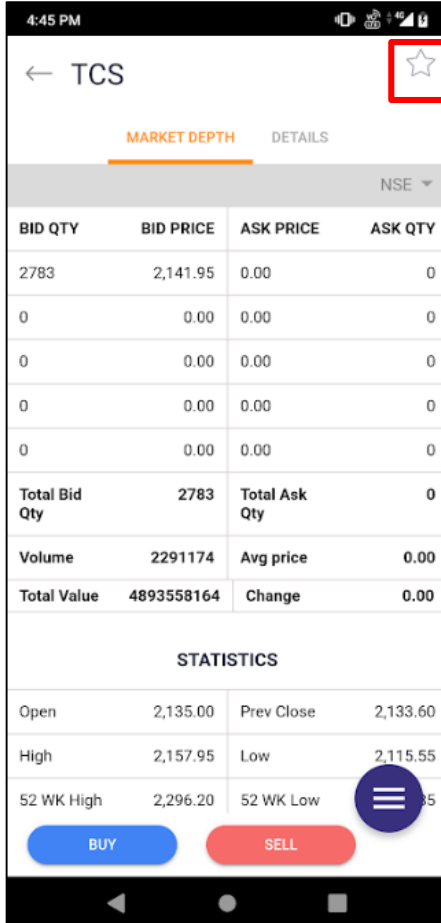
4.6. Buy sell from charts

- From dashboard click on the watchlist
- Select the scrip to view details.
- You can buy/sell & view market depth from top left corner of the screen
- Click on the Charts icon to view the chart.
- You can view charts by selecting time horizon of 1min,5 min,10 min,15 min,30 min & 1 hr.
- Click on 1 D, 5D, 1M, 3M, 6M,1yr, 3 yr to see the trend for the selected time frame.
- You can also view LTP and % change on the chart.



4.7. Quick add scrip to watchlist from Market depth

Select the watchlist in which you want to add the scrip as shown in the below image.



4:45 PM

← TCS

MARKET DEPTH DETAILS

NSE

BID QTY	BID PRICE	ASK PRICE	ASK QTY
2783	2,141.95	0.00	0
0	0.00	0.00	0
0	0.00	0.00	0
0	0.00	0.00	0
0	0.00	0.00	0
Total Bid Qty	2783	Total Ask Qty	0
Volume	2291174	Avg price	0.00
Total Value	4893558164	Change	0.00

STATISTICS

Open	2,135.00	Prev Close	2,133.60
High	2,157.95	Low	2,115.55
52 WK High	2,296.20	52 WK Low	1,815.55

BUY SELL



4:46 PM

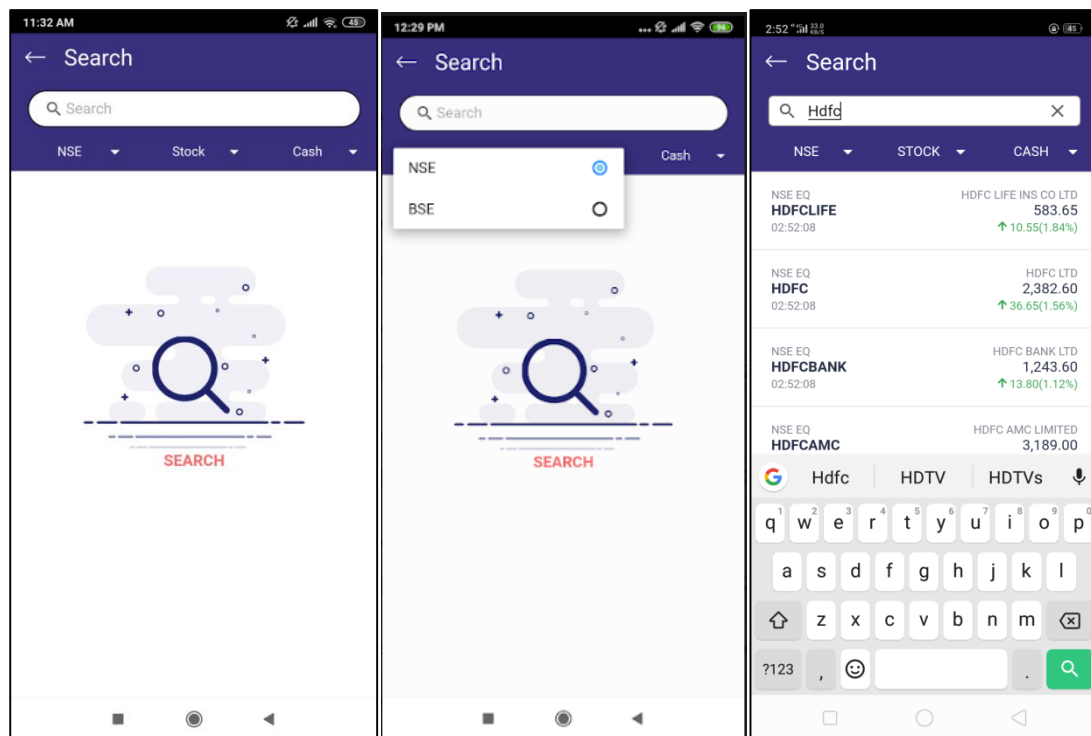
← TCS

ADD TO WATCHLIST

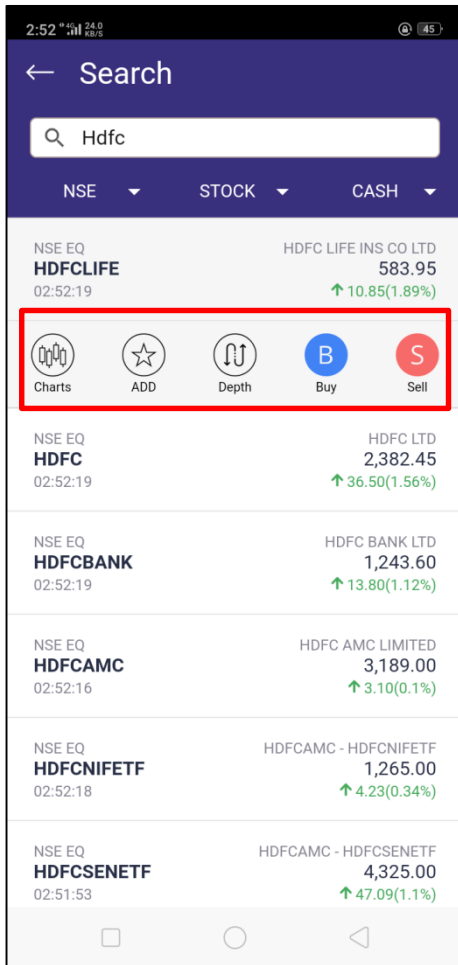
DISHA

5. Global Search

1. Click on search icon to search scrips.
2. You can search for stock, indices by selecting particular exchange & market segment from the drop down option as shown in the image below.
3. From top right corner of screen you can search scrip by company name
4. It may be BE,SM,Equity,Future,Option
5. As in the third screen you can see I have selected exchange as NSE, Market segment as stock & Segment as future & searched for HDFC Bank.



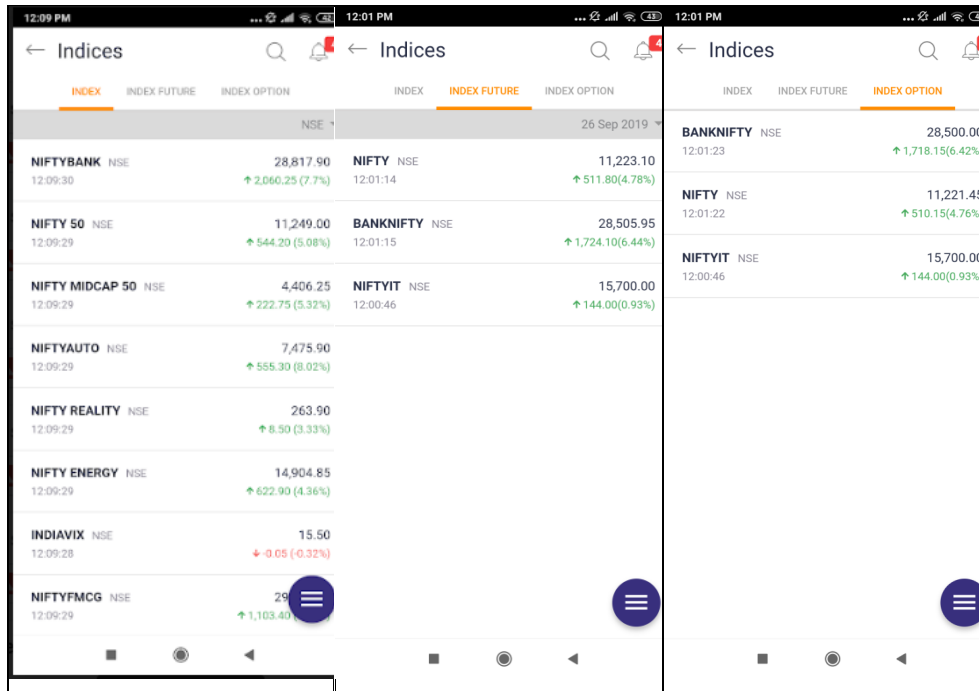
Select the scrip and click on Star icon to add the scrip in watchlist.
You can even buy/sell & check market depth.



6. Default scrip

6.1. Default Index Screen

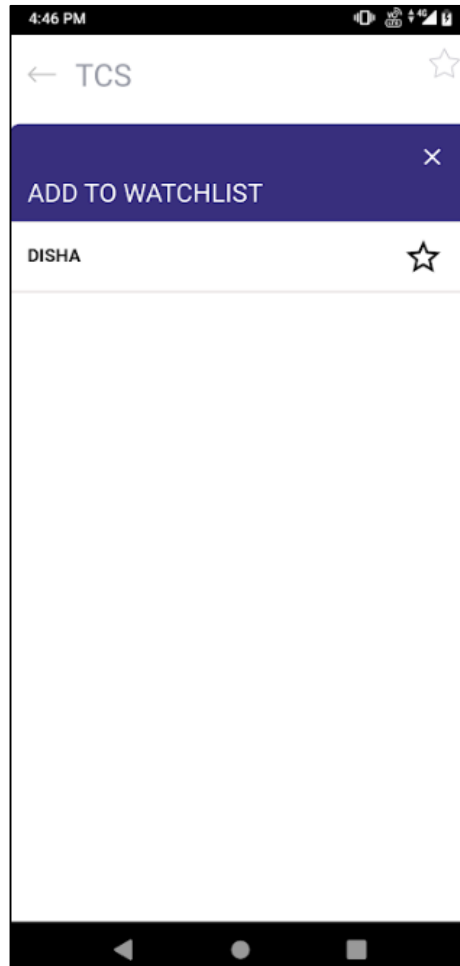
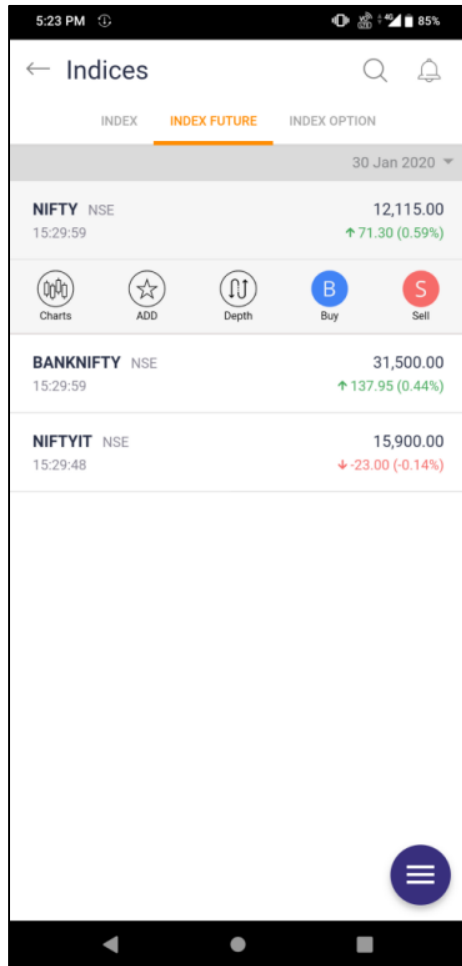
Investmentz also have default scrips of Indices & Stock from where user can trade without adding the scrips to the watchlist. Refer to the images below:



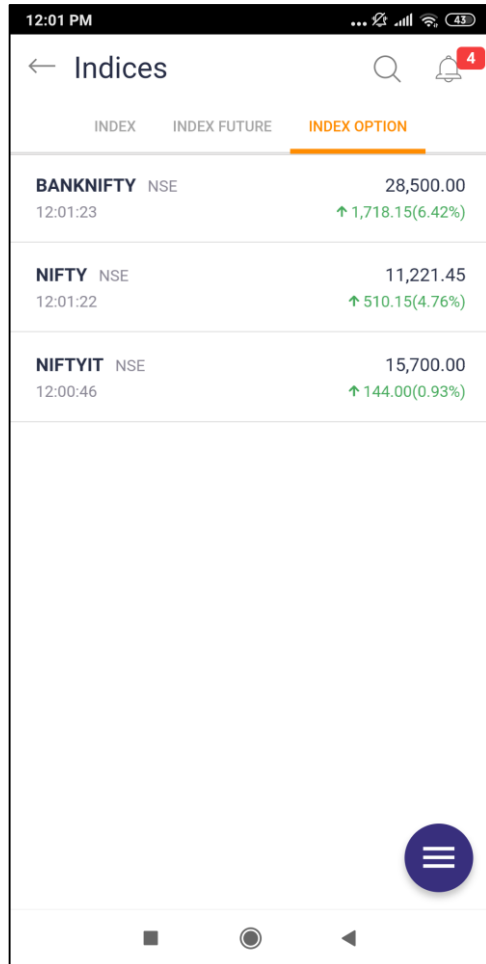
Select the scrip and click on Star icon to add the scrip in watchlist

Select the watchlist in which you want to add the scrip

Even you can view charts & buy/sell scrip from Index future screen.



Under Index option when you will click on particular Index you will land on option chain page. From Option chain page when you select particular strike price choosing call or put click on its strike price row than you will land on detail page.



5:27 PM

← Option 26 Sep 2019

BANKNIFTY 27,880.00
15:29:59 NSE ↓ -283.85 (-1.01%)

CALL		PUT		
LTP	%chg	STRIKE PRICE	%chg	LTP
670.00	-23.62%	27400	65.24%	185.40
593.90	-25.37%	27500	61.9%	213.55
509.75	-28.34%	27600	59.8%	241.85
474.20	-26.21%	27700	67.01%	299.95
409.00	-27.85%	27800	58.3%	319.05
350.00	-30.34%	27900	57.95%	367.95
301.35	-30.86%	28000	54.56%	414.00
256.00	-32.49%	28100	51.26%	471.70
216.90	-33.5%	28200	48.03%	525.80
176.80	-36.63%	28300	44.91%	594.00
147.45	-37.32%	28400	-8.79%	633.40

6.2. Detail page of Call / Put Option

From detail page you need to select the particular strike price & after choosing click on its strike price row after then you will land on detail page of the scrip.

12:16 PM

← Call 26 Sep 2019

BANKNIFTY 28,816.00
12:16:57 NSE ↑ 2,033.65(7.59%)

LTP	BID PRICE	QTY	ASK PRICE	QTY	STRIK PRICE
3,595.65	3,576.95	80	3,643.50	20	25200
3,243.20	3,470.10	40	3,569.85	40	25300
1,584.75	3,137.50	4860	0.00	0	25400
3,263.60	3,302.15	20	3,344.85	20	25500
1,200.00	2,893.90	4860	0.00	0	25600
2,718.20	2,998.35	2400	0.00	0	25700
2,898.25	2,972.75	40	3,059.80	300	25800
2,723.85	2,874.25	40	2,969.90	20	25900
2,887.35	2,799.35	20	2,838.10	20	26000
2,589.65	2,690.40	20	2,747.50	20	26100
2,300.00	2,590.30	20	2,667.65	40	26200
2,500.00	2,506.95	20	2,558.80	40	26300
2,202.60	2,401.95	20	2,454.05	20	26400
2,338.25	2,324.10	20	2,342.75	60	26500
2,257.95	2,205.55	20	2,244.75	100	26600
2,126.15	2,124.25	20	2,147.05	60	26700
2,041.15	2,032.90	40	2,049.25	20	26800

12:17 PM

← Put 26 Sep 2019

BANKNIFTY 28,824.00
12:17:07 NSE ↑ 2,042.15(7.63%)

LTP	BID PRICE	QTY	ASK PRICE	QTY	STRIK PRICE
5.05	5.00	780	5.05	40	25200
5.70	5.50	200	5.70	120	25300
6.70	6.30	140	6.70	120	25400
7.15	7.15	40	7.25	120	25500
7.55	7.25	20	7.55	300	25600
7.80	7.75	300	7.95	120	25700
9.05	8.90	20	9.05	20	25800
10.65	10.35	60	10.65	80	25900
12.40	12.25	480	12.45	180	26000
14.35	14.05	2400	14.25	20	26100
15.70	15.70	360	16.00	100	26200
18.35	18.10	40	18.35	220	26300
20.75	20.25	80	20.65	20	26400
22.35	22.00	40	22.35	20	26500
25.20	25.30	20	25.65	60	26600
29.20	28.75	60	29.20	280	26700
32.60	32.60	160	32.90	120	26800

Here you can check market depth & company detail of particular scrip. When you will click on Buy/Sell it will take on order placement page

12:39 PM

← BANKNIFTY ☆

MARKET DEPTH DETAILS

NSE ▾

BID QTY	BID PRICE	ASK PRICE	ASK QTY
0	0.00	0.00	0
0	0.00	0.00	0
0	0.00	0.00	0
0	0.00	0.00	0
0	0.00	0.00	0
Total Bid Qty	0	Total Ask Qty	0
Volume	500	Avg price	0.00
Total Value	633085	Change	75.9%

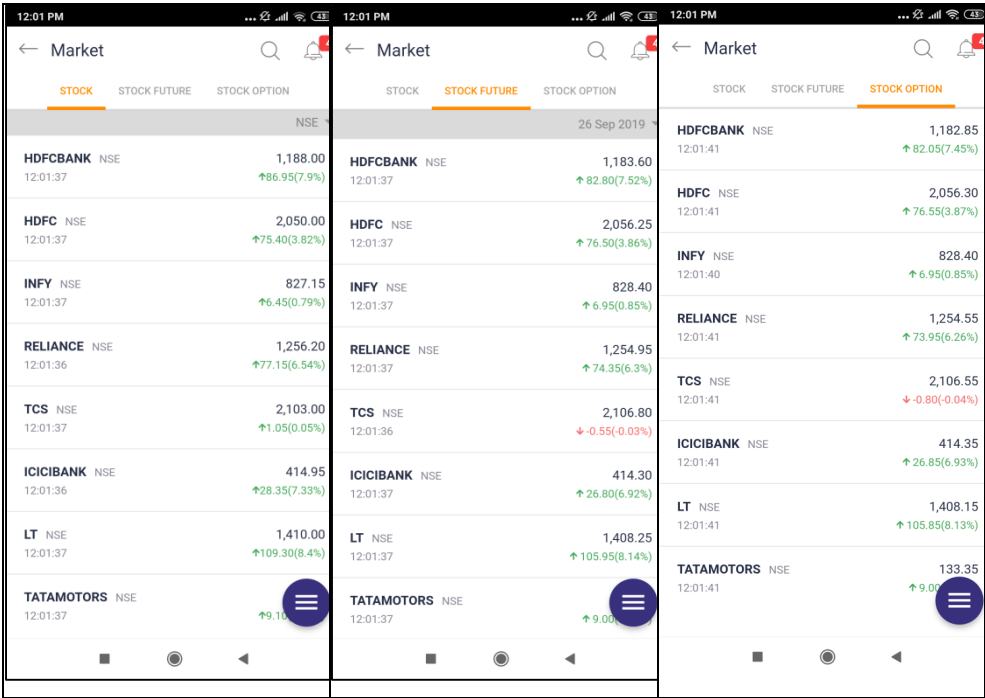
STATISTICS

Open	1,114.50	Prev Close	1,548.55
High	2,723.85	Low	1,046.35
52 WK High	N/A	52 WK Low	N/A
Lower ckt	0.05	Upper ckt	in

BUY SELL

6.3. Default Stock Screen

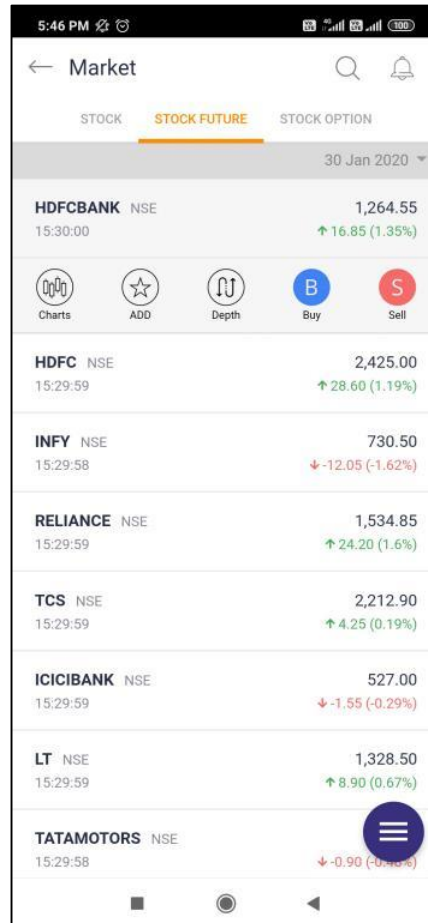
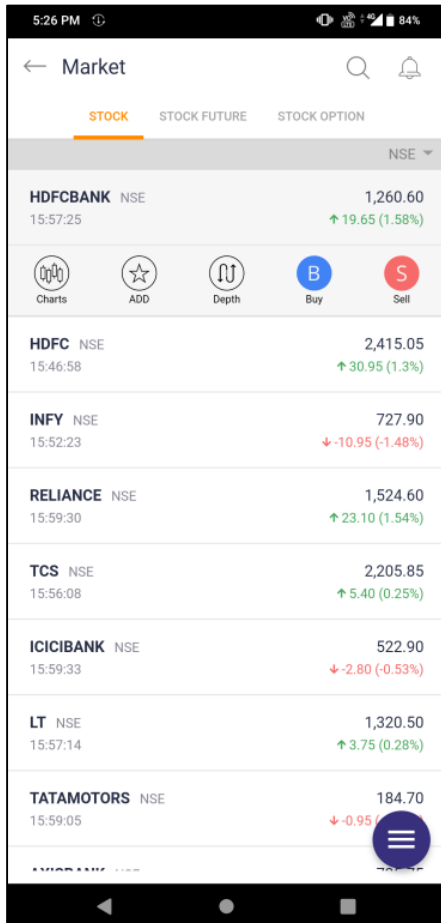
Now, this screen shows you the default stock which is being divided into three parts viz. Stock, Stock Future & Stock Option.



Select the scrip and click on Star icon to add the scrip in watchlist

Select the watchlist in which you want to add the scrip.

Even you can buy/sell scrip from stock, stock futures.



Under Stock Option screen when you will click on particular scrip you will land on option chain page. From Option chain page when you select particular strike price choosing call or put click on its strike price row than you will land on detail page.

12:01 PM

← Market

STOCK STOCK FUTURE **STOCK OPTION**

HDFCBANK NSE	1,182.85
12:01:41	↑ 82.05(7.45%)
HDFC NSE	2,056.30
12:01:41	↑ 76.55(3.87%)
INFY NSE	828.40
12:01:40	↑ 6.95(0.85%)
RELIANCE NSE	1,254.55
12:01:41	↑ 73.95(6.26%)
TCS NSE	2,106.55
12:01:41	↓ -0.80(-0.04%)
ICICIBANK NSE	414.35
12:01:41	↑ 26.85(6.93%)
LT NSE	1,408.15
12:01:41	↑ 105.85(8.13%)
TATAMOTORS NSE	133.35
12:01:41	↑ 9.00

12:17 PM

← Option 26 Sep 2019

HDFCBANK 1,186.90
12:17:28 NSE ↑ 86.10 (7.82%)

CALL		PUT	
LTP	%chg	STRIKE PRICE	%chg
0.00	0%	1140	0%
0.00	0%	1150	0%
0.00	0%	1160	0%
0.00	0%	1170	0%
0.00	0%	1180	0%
0.00	0%	1190	0%
0.00	0%	1200	0%
0.00	0%	1210	0%
0.00	0%	1220	0%
0.00	0%	1230	0%
0.00	0%	1240	0%

6.4. Detail page of Call / Put Option

From detail page you need to select the particular strike price & after choosing click on its strike price row then user will land on detail page of the scrip.

LTP	BID PRICE	QTY	ASK PRICE	QTY	STRICK PRICE
0.00	0.00	0	0.00	0	880
0.00	0.00	0	0.00	0	890
0.00	0.00	0	0.00	0	900
0.00	0.00	0	0.00	0	910
0.00	0.00	0	0.00	0	920
0.00	0.00	0	0.00	0	930
0.00	0.00	0	0.00	0	940
0.00	0.00	0	0.00	0	950
0.00	0.00	0	0.00	0	960
0.00	0.00	0	0.00	0	970
0.00	0.00	0	0.00	0	980
0.00	0.00	0	0.00	0	990
0.00	0.00	0	0.00	0	1000
0.00	0.00	0	0.00	0	1010
0.00	0.00	0	0.00	0	1020
0.00	0.00	0	0.00	0	1030
0.00	0.00	0	0.00	0	1040

LTP	BID PRICE	QTY	ASK PRICE	QTY	STRICK PRICE
0.00	0.00	0	0.00	0	880
0.00	0.00	0	0.00	0	890
0.00	0.00	0	0.00	0	900
0.00	0.00	0	0.00	0	910
0.00	0.00	0	0.00	0	920
0.00	0.00	0	0.00	0	930
0.00	0.00	0	0.00	0	940
0.00	0.00	0	0.00	0	950
0.00	0.00	0	0.00	0	960
0.00	0.00	0	0.00	0	970
0.00	0.00	0	0.00	0	980
0.00	0.00	0	0.00	0	990
0.00	0.00	0	0.00	0	1000
0.00	0.00	0	0.00	0	1010
0.00	0.00	0	0.00	0	1020
0.00	0.00	0	0.00	0	1030
0.00	0.00	0	0.00	0	1040

Here the user can check market depth & company detail of particular scrip. When user will click on Buy/Sell it will take on order placement page.

12:38 PM

← HDFCBANK ☆

MARKET DEPTH DETAILS

NSE ▾

BID QTY	BID PRICE	ASK PRICE	ASK QTY
0	0.00	0.00	0
0	0.00	0.00	0
0	0.00	0.00	0
0	0.00	0.00	0
0	0.00	0.00	0
Total Bid Qty	0	Total Ask Qty	0
Volume	0	Avg price	0.00
Total Value	0	Change	0%

STATISTICS

Open	0.00	Prev Close	0.00
High	0.00	Low	0.00
52 WK High	N/A	52 WK Low	N/A
Lower pct	0.05	Upper pct	0.05

BUY SELL

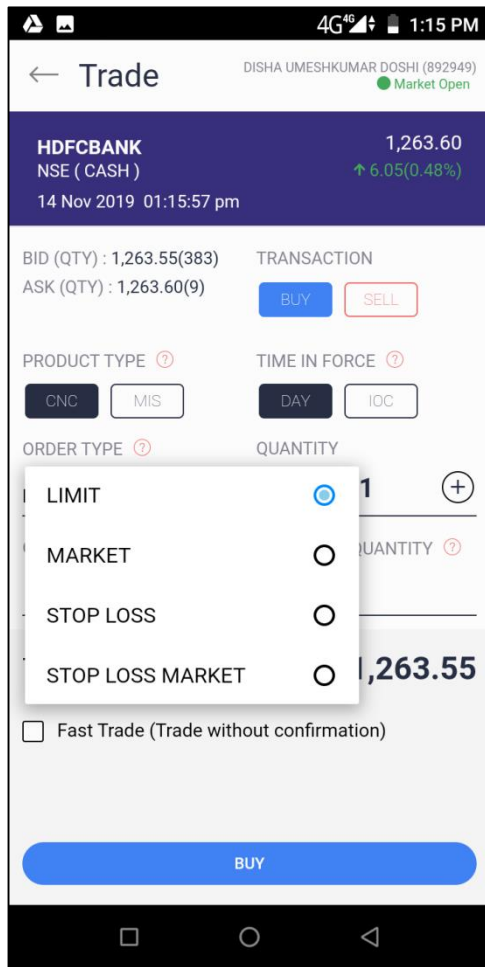
7. Order Placement

On this page the user can Buy/ Sell the scrip as per your order type, quantity, time in force, order price, product type. If you wish to use the disclose quantity feature it will be enable only in two types of order i.e market or limit.

The screenshot displays the 'Trade' screen for the stock ACC. At the top, the user's name 'DISHA UMESHKUMAR DOSHI (892949)' and the market status 'Market Open' are shown. The current price of ACC is 1,482.80, with a change of -11.20 (-0.75%) from the previous close. The date and time are 14 Nov 2019, 12:42:18 pm. The screen shows the current bid (1,482.80) and ask (1,483.00) prices. The user has selected 'BUY' and 'LIMIT' order type. The quantity is set to 1. The order price is 1483.00, and the disclosed quantity is 0. The total order value is ₹ 1,483.00. There is a checkbox for 'Fast Trade (Trade without confirmation)' which is currently unchecked. A large blue 'BUY' button is at the bottom.

Field	Value
ACC	1,482.80
NSE (CASH)	↓ -11.20 (-0.75%)
BID (QTY)	1,482.80(15)
ASK (QTY)	1,483.00(18)
ORDER PRICE	1483.00
DISCLOSED QUANTITY	0
QUANTITY	1
TOTAL	₹ 1,483.00

Select Order Type



- **Market (MKT) order**

Place an order to be bought or sold at the best available price

- **Limit (LMT) order**

Place buy or sell order at a predetermined price

- **Stop loss and Stop loss (Market) order**

Stop loss if placing a predetermined loss booking order at a trigger price.

Trigger - If this type of order is used to enter a fresh buy above the current market price or sell below the current market price when the trigger price is hit.

SL - If limit order to be sent when trigger is hit. SL-M if a market order to be sent when trigger is hit. For guaranteed execution, always use SL-M.

Trigger price should not be greater than or equal to actual price for SL
Buy order Trigger price should not be less than or equal to actual price
for SL sell order.

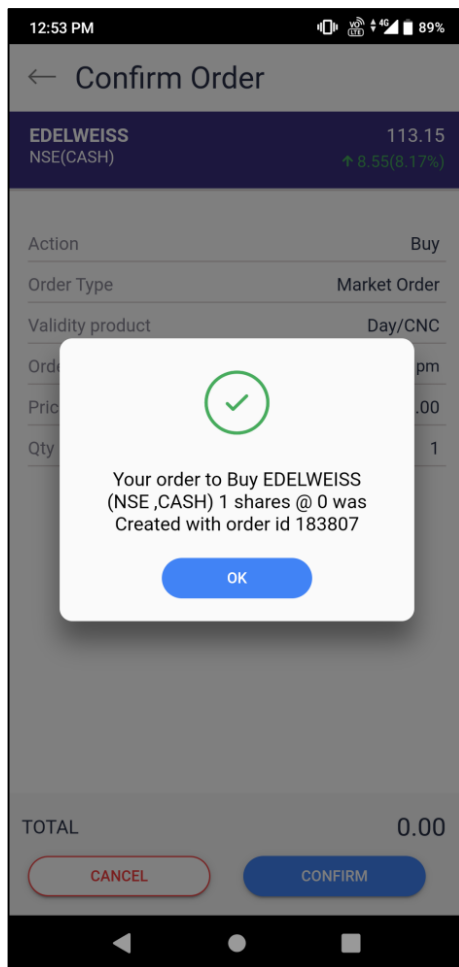
Select Time in Force

The screenshot shows a mobile trading interface for ACC (NSE CASH). The current price is 1,482.80, with a change of -11.20 (-0.75%). The order type is set to LIMIT, and the quantity is 1. The 'TIME IN FORCE' section is highlighted with a red box, showing 'DAY' selected and 'IOC' as an alternative. The total order value is ₹ 1,483.00. A 'BUY' button is located at the bottom of the screen.

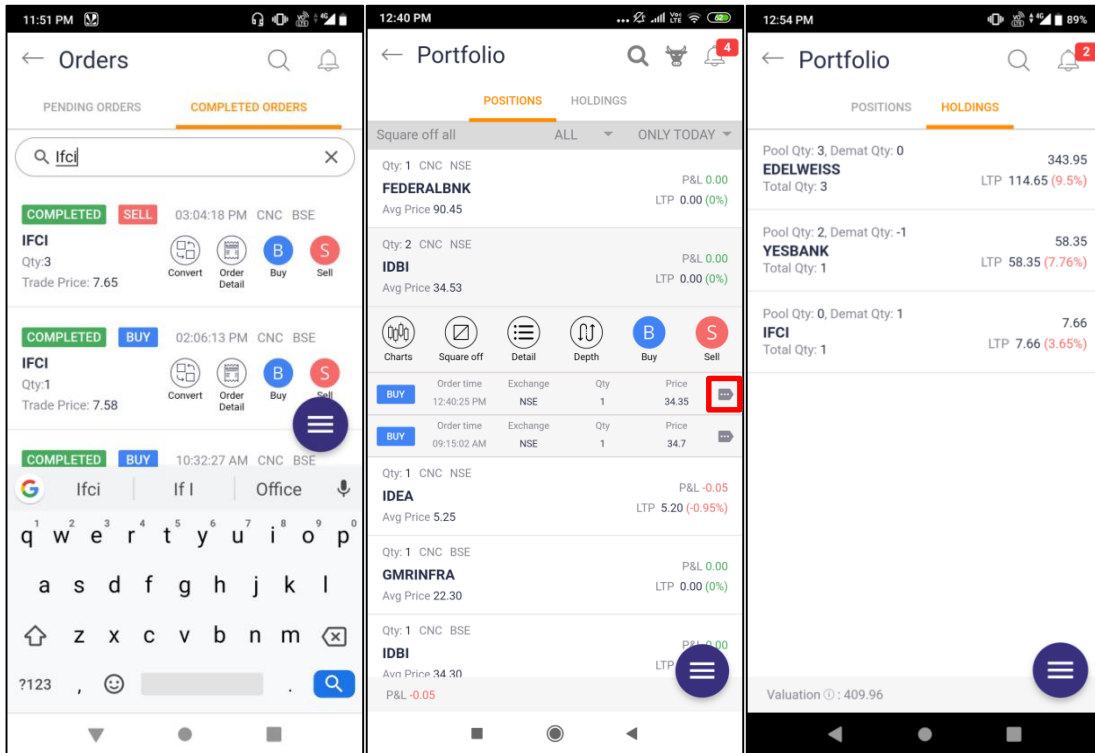
- **Day** – Day orders for orders to be valid till end of day (selected by default)
- **IOC (Immediate or cancel)** – In IOC, all or part of the order are executed immediately and the unfilled parts of the order are cancelled.

- Enter the quantity, order price, product type and disclosed quantity after which click on buy button. You will get a order confirmation message & a popup will appear on screen.

Order Created Confirmation Message



Even you can buy/ sell scrip from completed order, & portfolio screen I.e (from both position & holdings.)



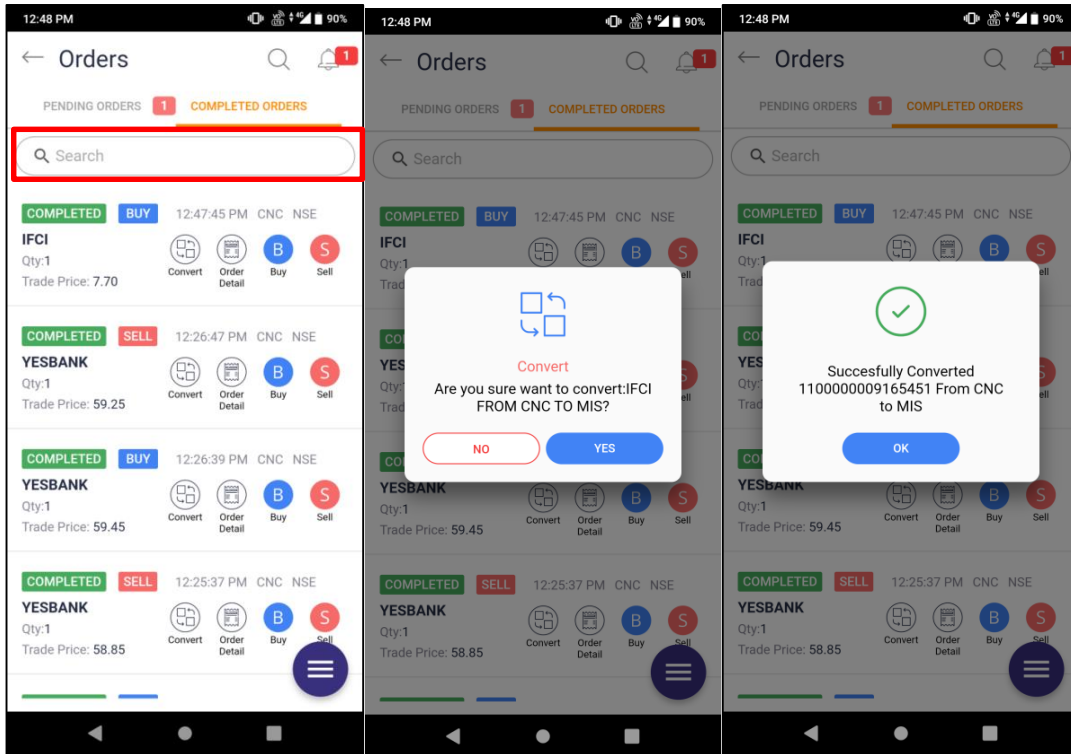
8. Completed Orders

Completed order shows all your executed orders. From this screen the user can convert scrip from MIS to CNC or CNC to MIS.

Search the Completed orders to track the history.

When you convert scrip you will get successful popup on the screen.

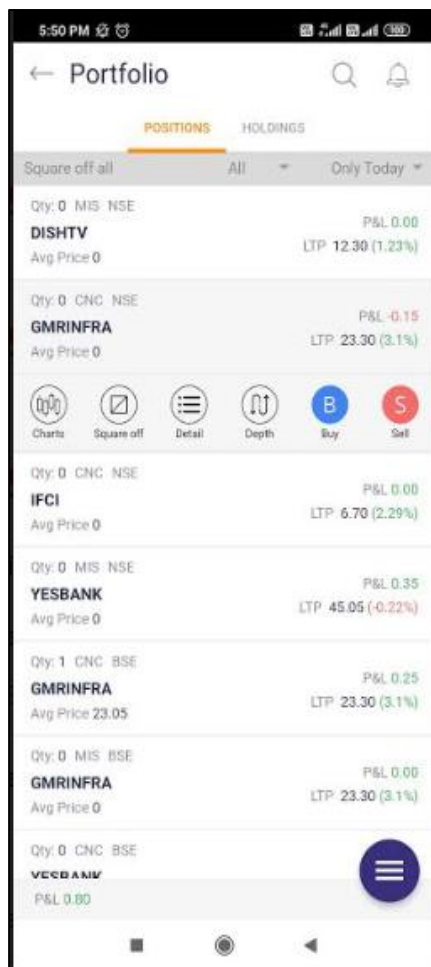
Also the user can check with order detail & can buy/sell scrip.



9. Positions

As we trade, it becomes essential for us to monitor our positions regularly.

With Investmentz this is a piece of cake. It will show you the scrip which you bought in detail with your average price, last traded price (change in terms of percentage & rupees).



Square Off

Square off simply means to close all your open positions before the end of the day.

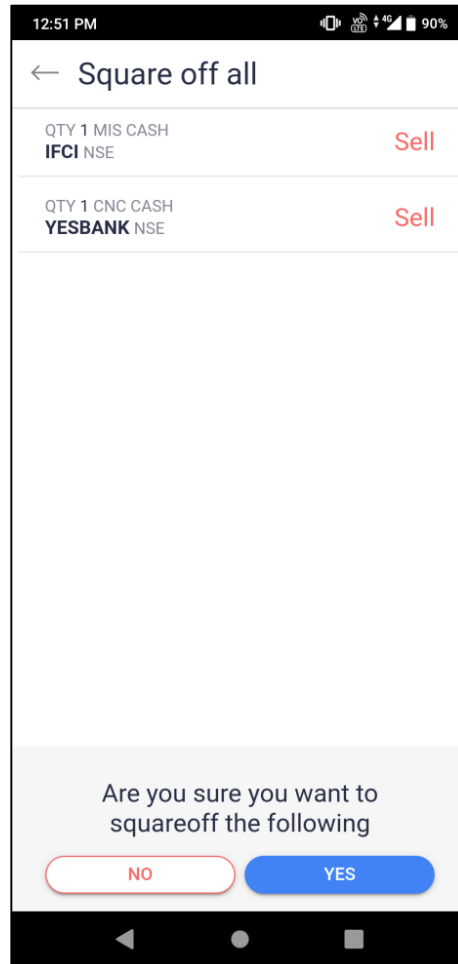
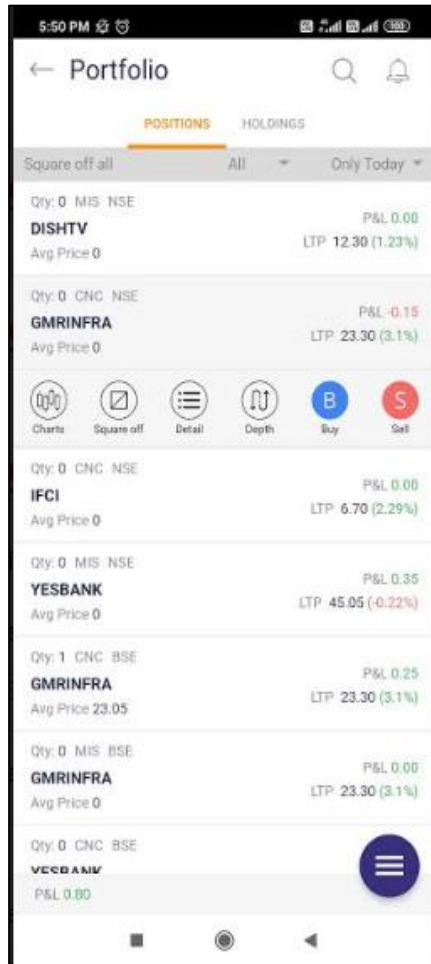
User can square off both in CNC & MIS Order.

If you have bought shares in MIS, then before the end of the day you need to sell them at the same quantity. Or else at the end of the day auto square off will be done by our ACMIIL Team between 3:10 pm to 3:15 pm.

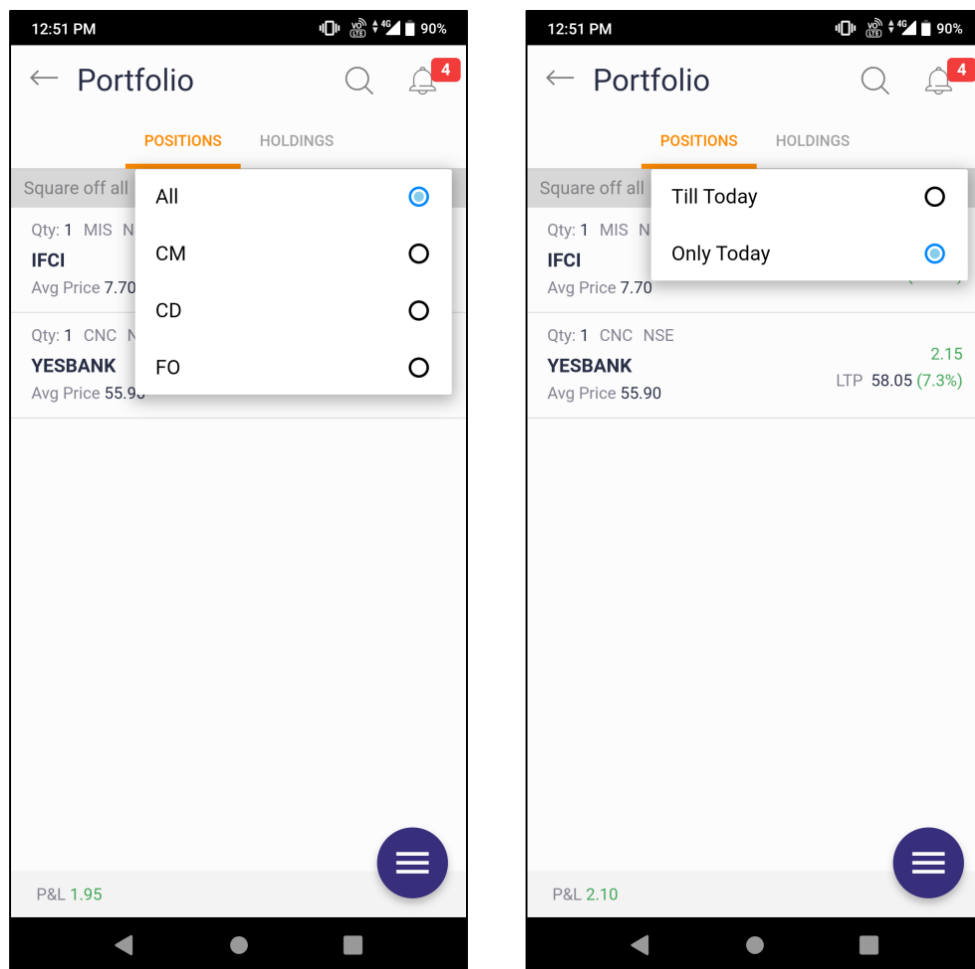
Square off all

When you click on square off all it will square off all your position as shown in the image below. Click on yes if want to square off .

Also you can buy/sell & view market depth from net position

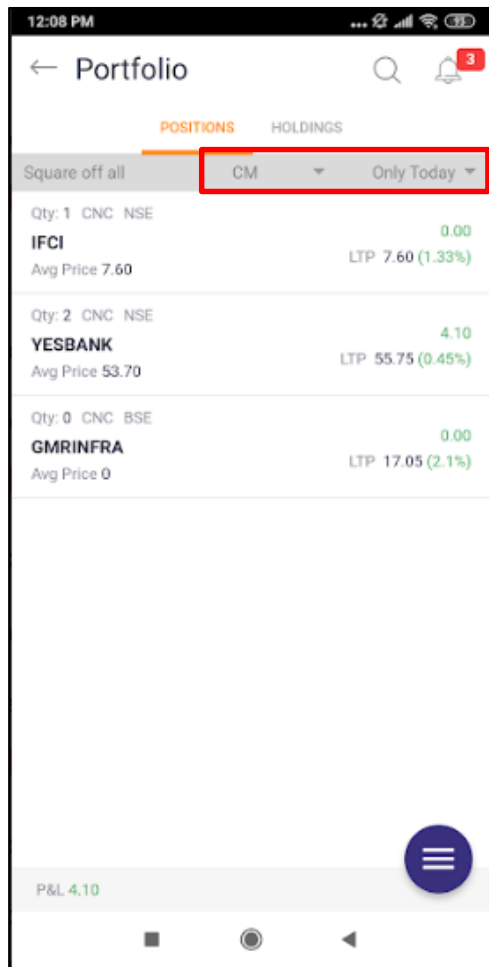


You even have the option to filter the position as type of order and day. Refer the image below:

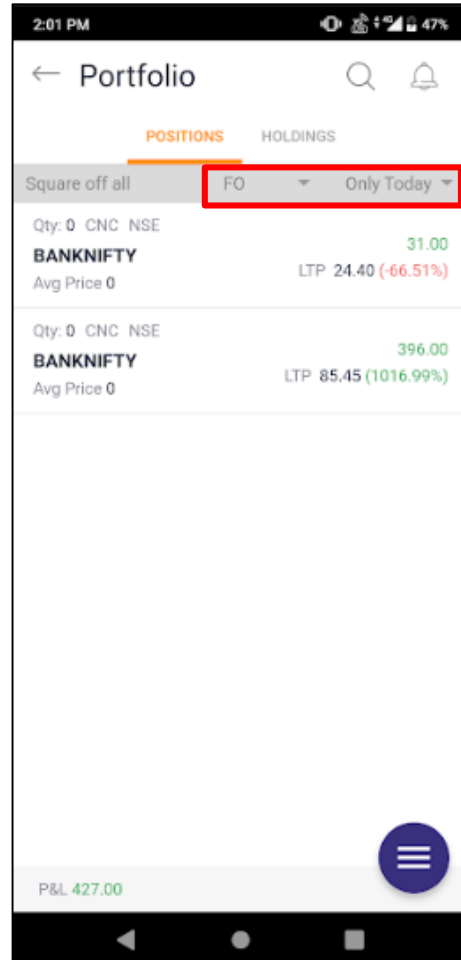
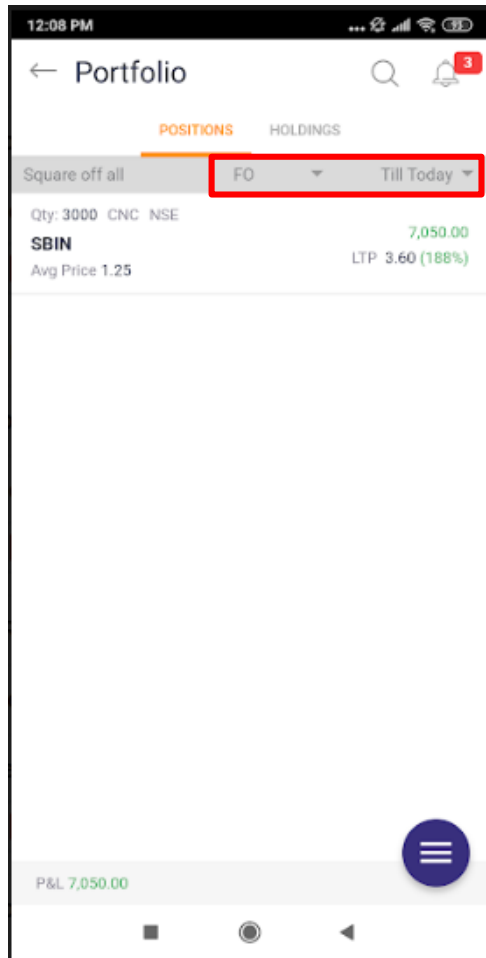


Under position when you want to check with Cash market scrip then select segment as CM with only today option from drop down. It will show you all your net quantity as per today.

In cash segment you can view all your open position of current day as shown in the image below.



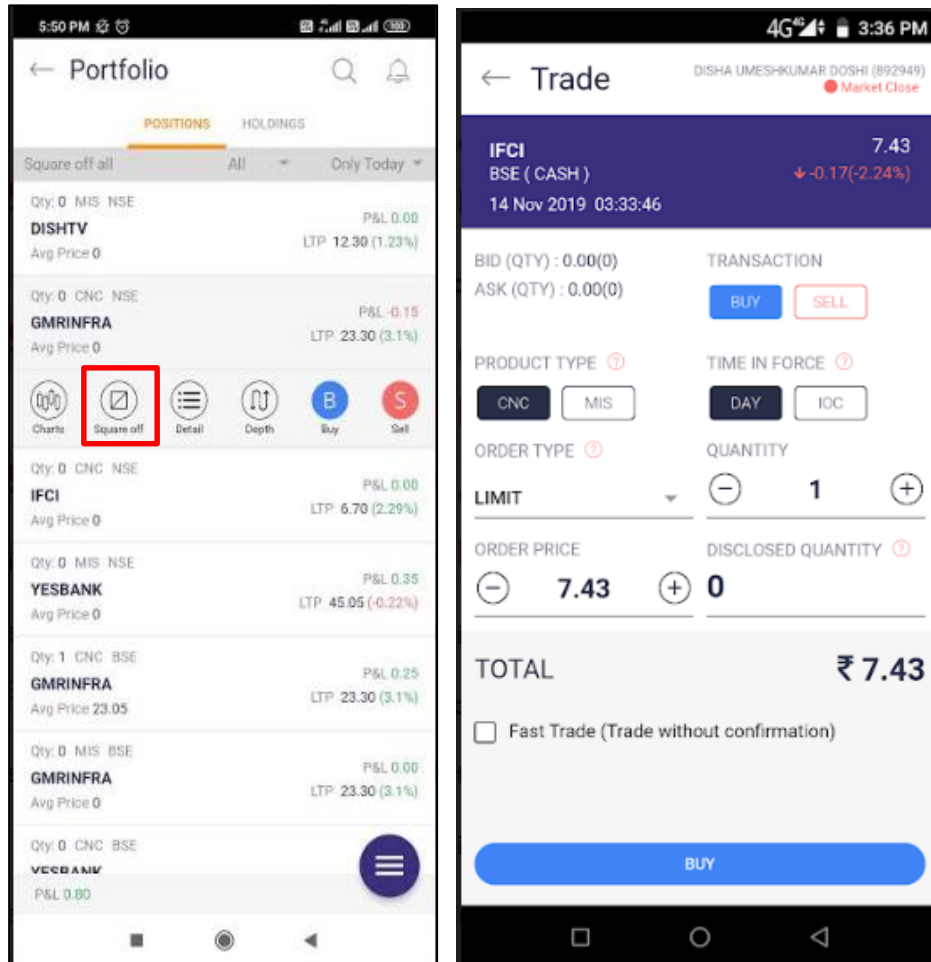
Also if user want to check with Future & Option scrip select FO from drop down. Under FO you can check your open position with both till today & only today as shown in the image below.



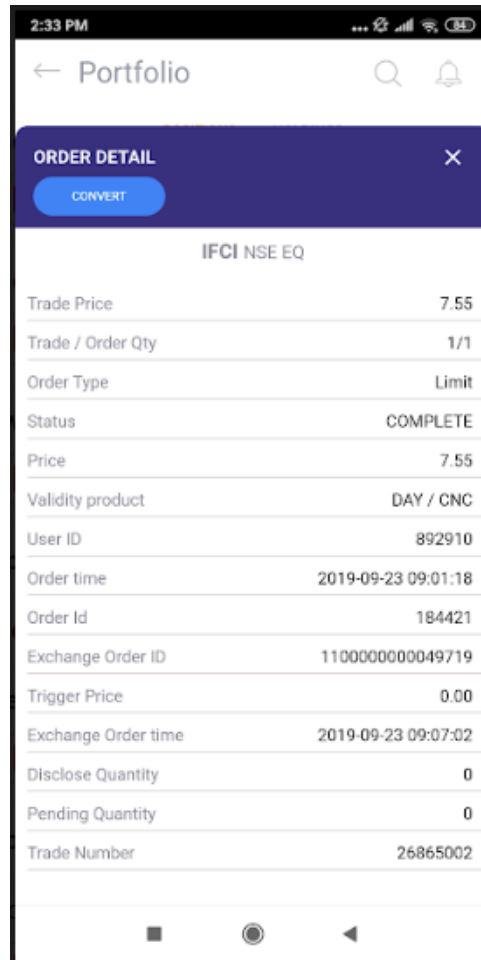
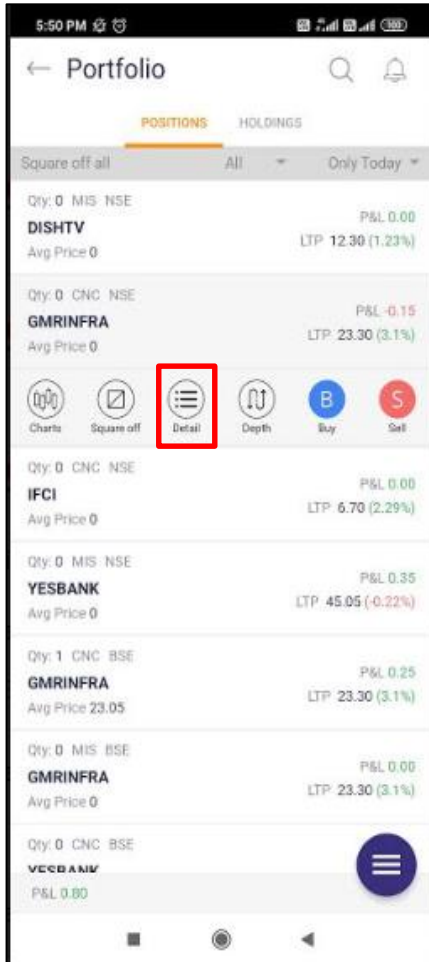
When you click on particular scrip you will get various option viz.

1. **Charts** - You can view charts of respective scrip.

2. **Individual Square off** - When you want to square off individual scrip it will take you on buy/sell page as shown in the image below.

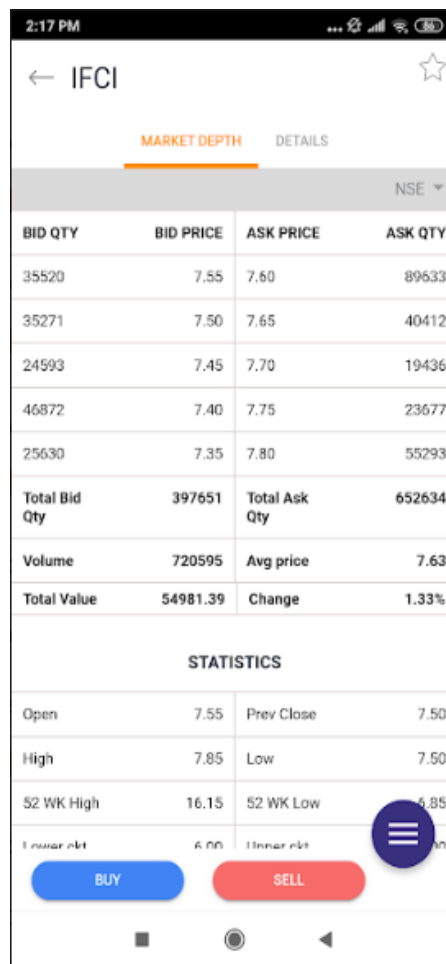
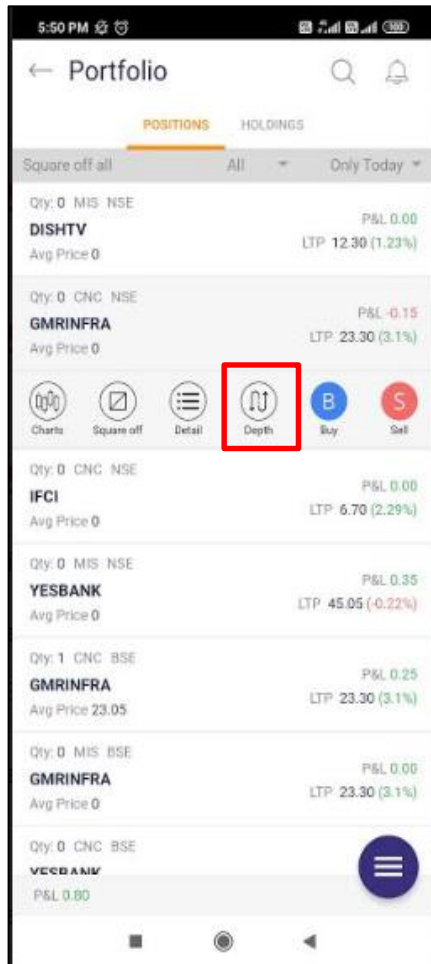


3. **Detail** - When you want to check with trade detail,click on detail and if you want to check with order detail click on the detail icon as shown in the image given below.



4.Depth - When user wants to check market depth & company detail then click on depth.

5.Buy/Sell - Even you can buy/sell scrip from positions screen.



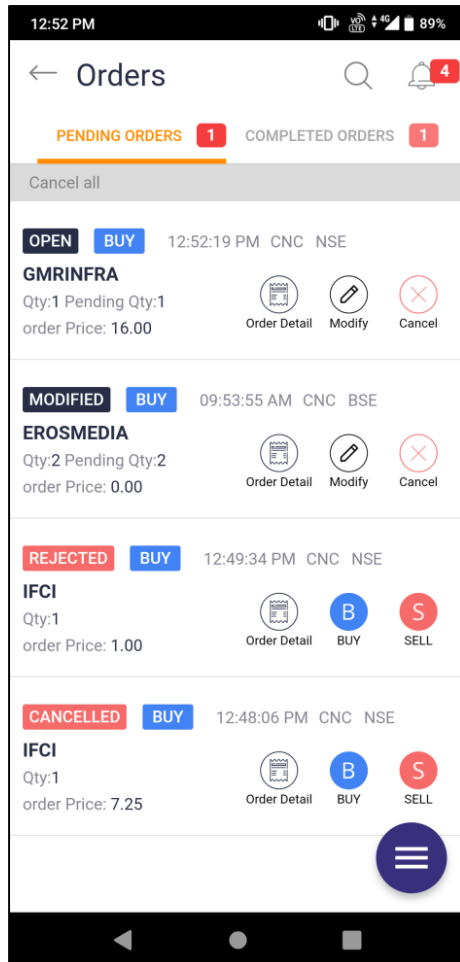
10. Pending Order

It shows all your pending orders i.e order which are open, modified, rejected, cancelled, partial.

You can Buy/Sell scrip from rejected orders

You can Buy/Sell scrip form cancelled order

You can quickly modify and cancel order

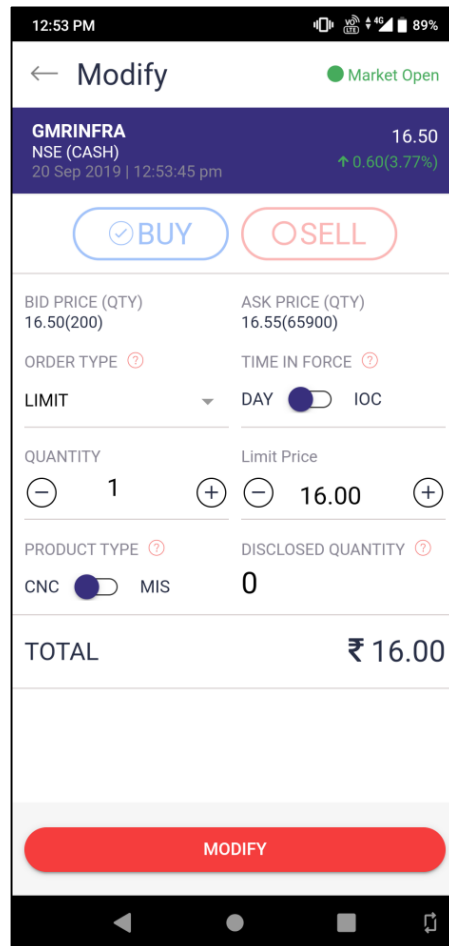
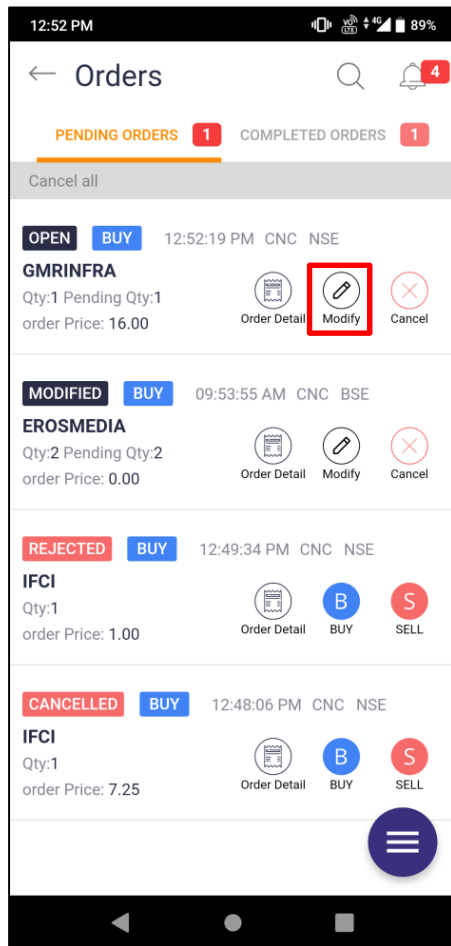


- **Open** means your order got confirmed but still it is not executed.
- **Modify** means you can modify your order w.r.t quantity, order type, MIS /CNC, Day or IOC.
- **Rejected** means your order might be rejected due to various reason it may be RMS rejection or system rejection.

- **Cancel** means if you don't want to trade in particular scrip user can cancel the order as per your choice.
- **Partial** means order whose some but not all quantity are traded at desired price is called partial order.

11. Modify Order - (Update & Cancel Order)

When user want to modify order click on modify icon you will be landing on modify page as shown in the image below.



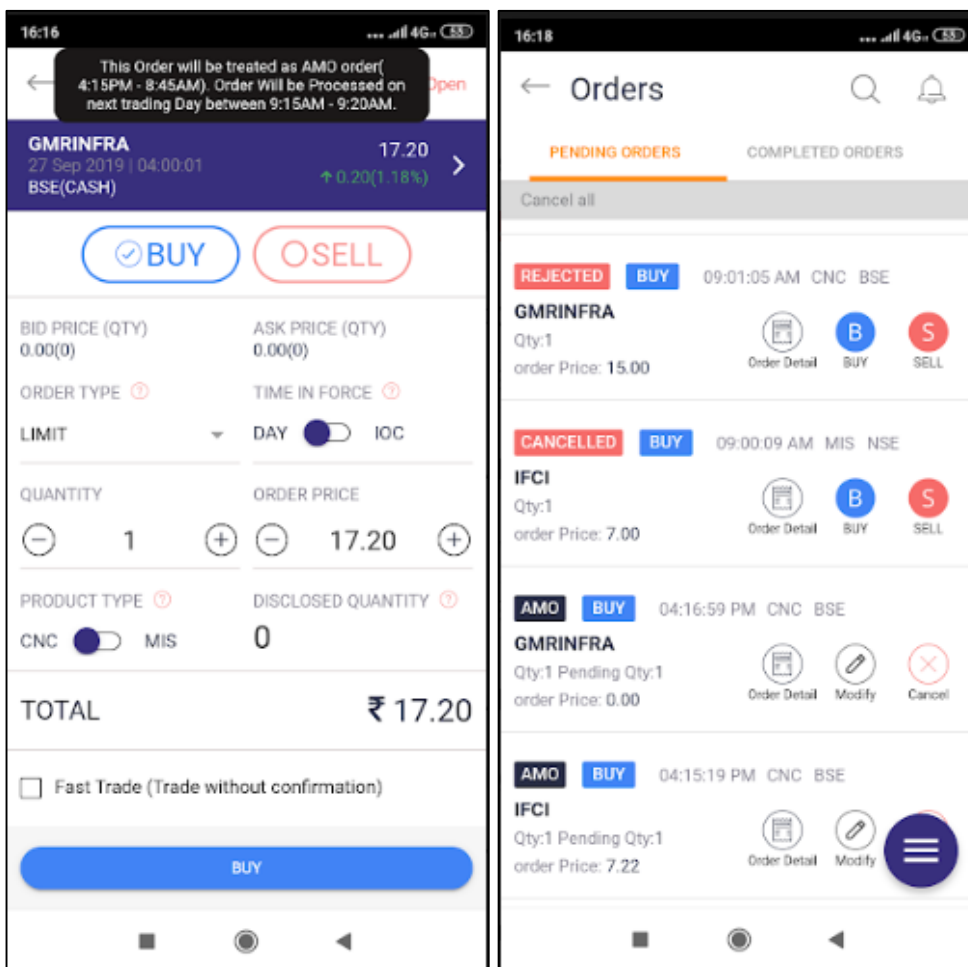
12. After market order - (AMO)

After Market Order or AMO is the order placed after the normal trading hours.

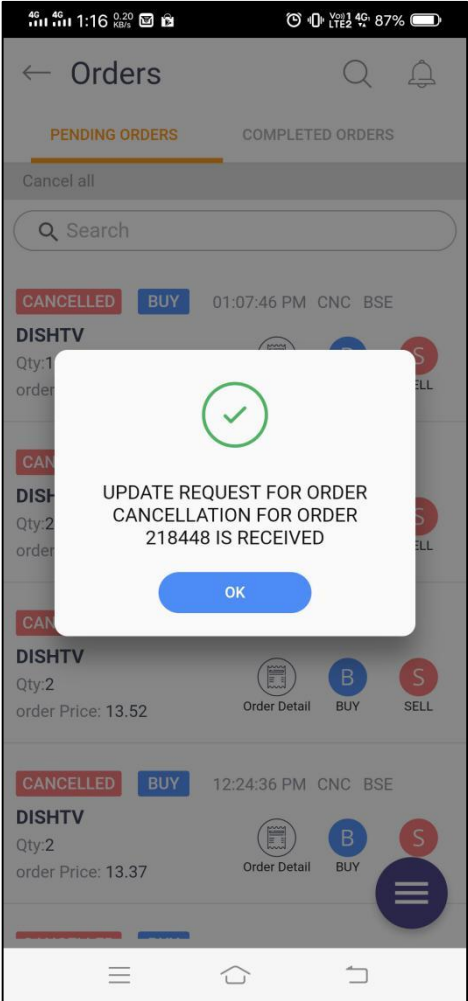
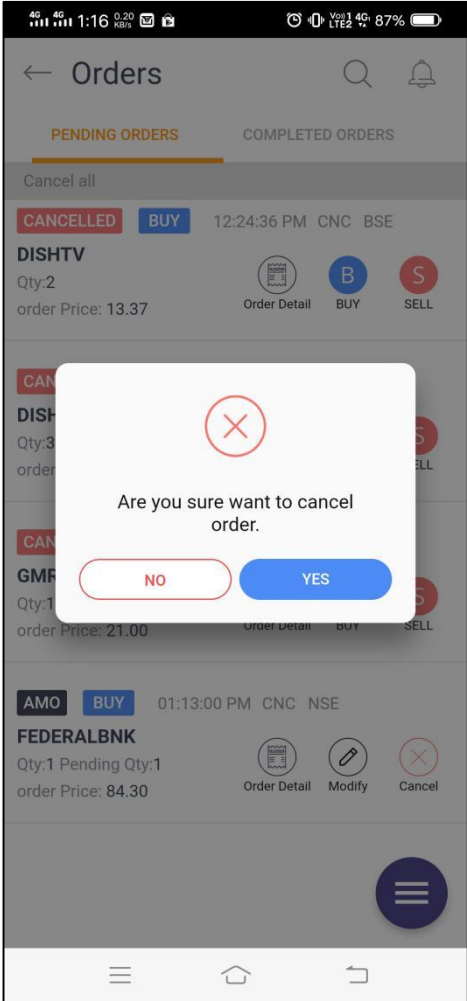
AMO Starts at 4.15pm to 8.45am till the next trading day

Suppose for Eg. When you place order in evening at 7pm it would be shown under pending order which will be executed on next trading day.

Your can view the order status in the Notification Tab.



Even you can modify & cancel the AMO Order as shown in the image below



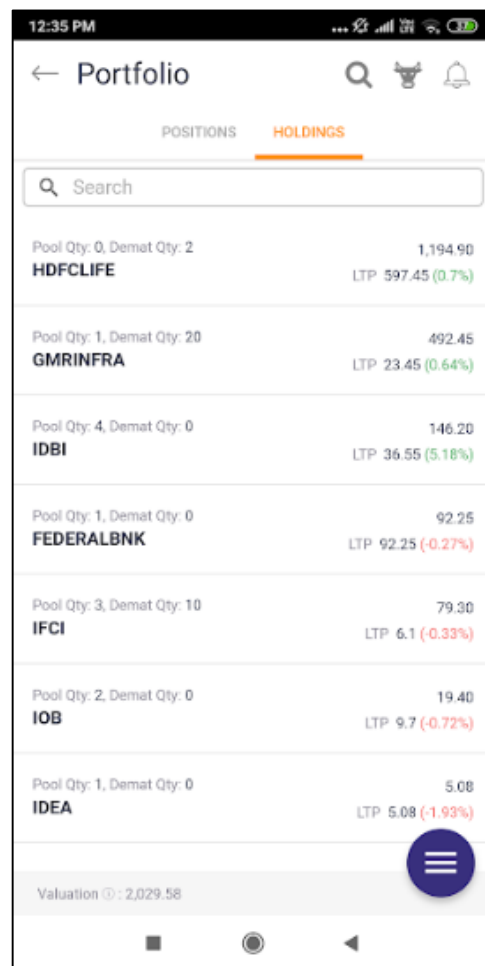
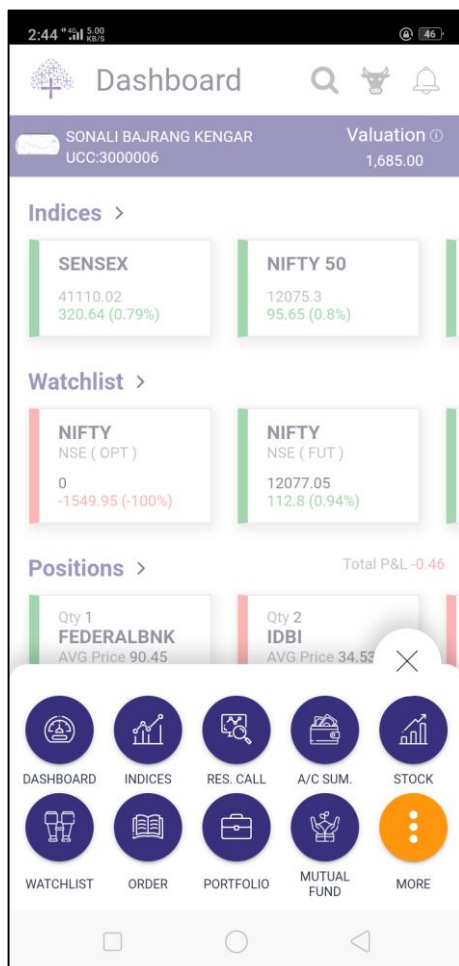
13.Holdings

Once you have bought stocks/equity on delivery basis you can check the same in Holdings.

You can view holdings from dashboard as well as menu bar.

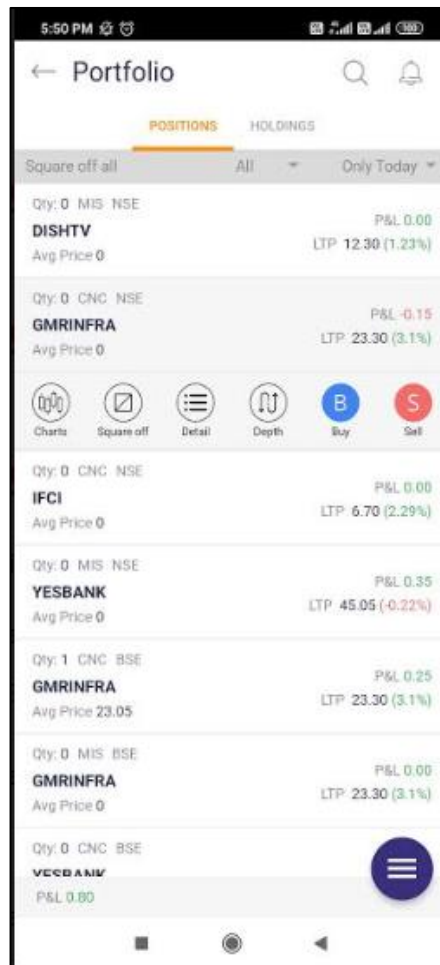
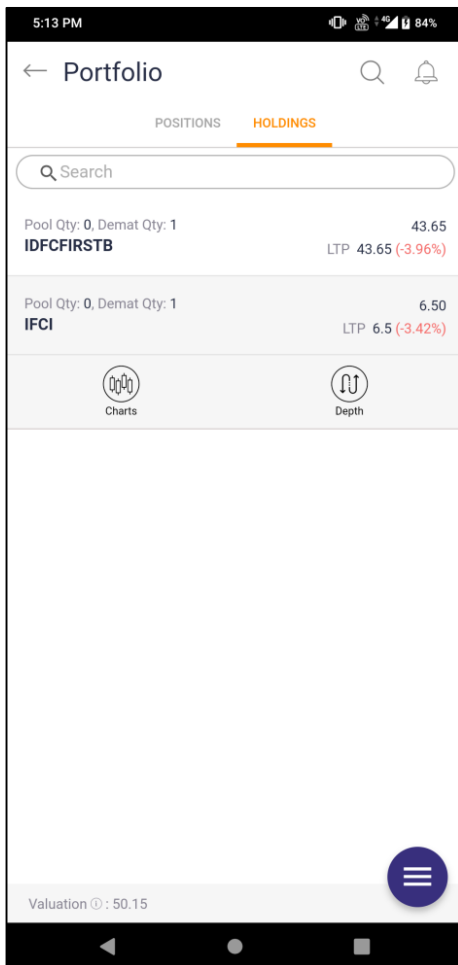
1. Click on Holdings
2. You can view pool + demat quantity
3. Individual Equity Current valuation
4. Total Equity Current valuation as per LTP

Search the scrips you have invested into from the holding screen



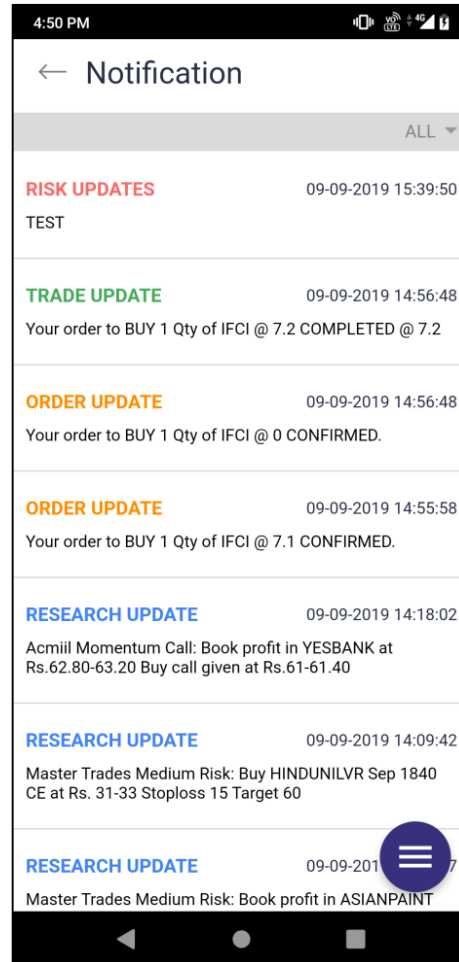
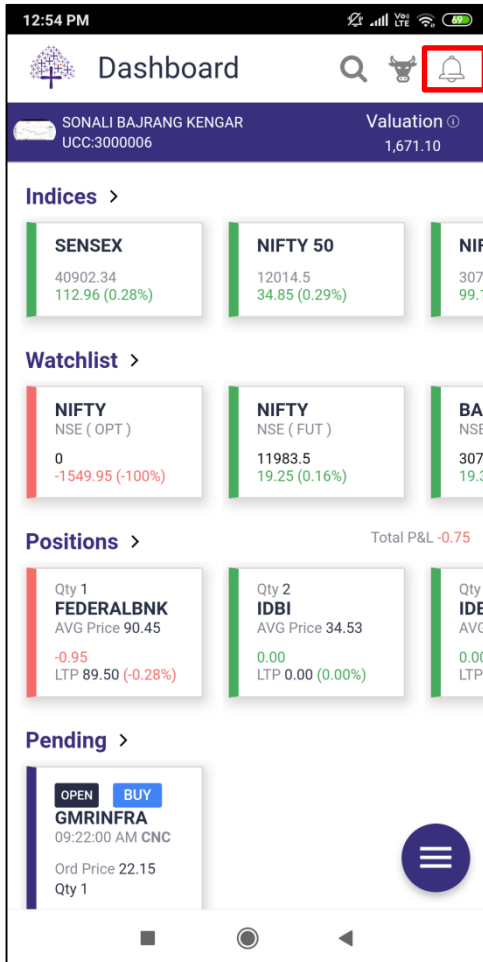
Buy/sell scrip & view market depth

Also you can buy/sell & view market depth from holdings & net position

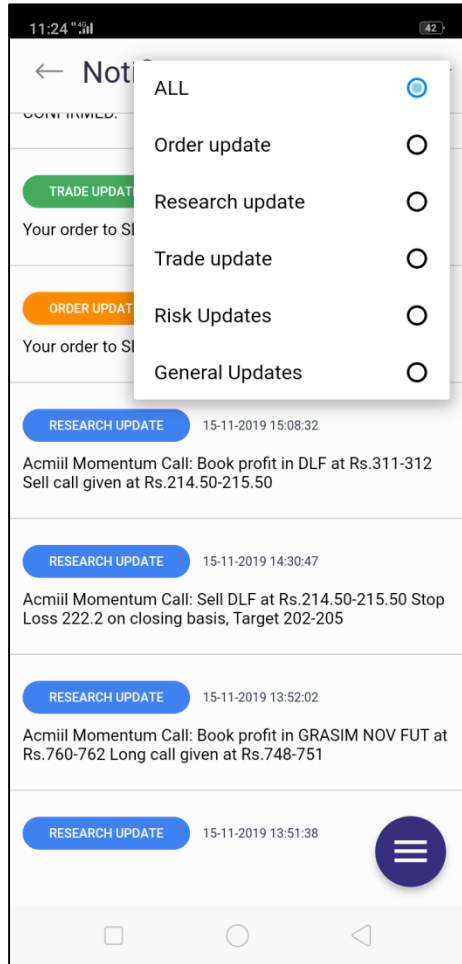


14. Notification

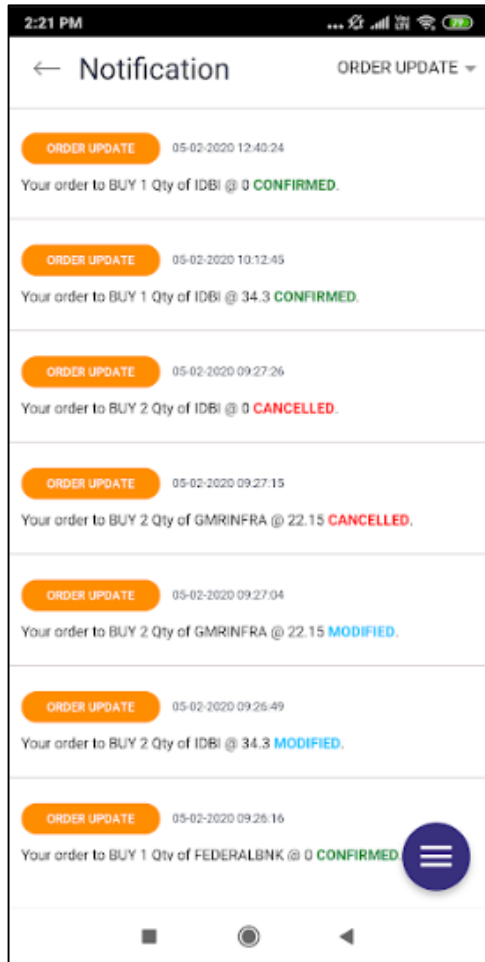
Access the notification from any window by clicking on the bell icon on the top right corner of the header panel.



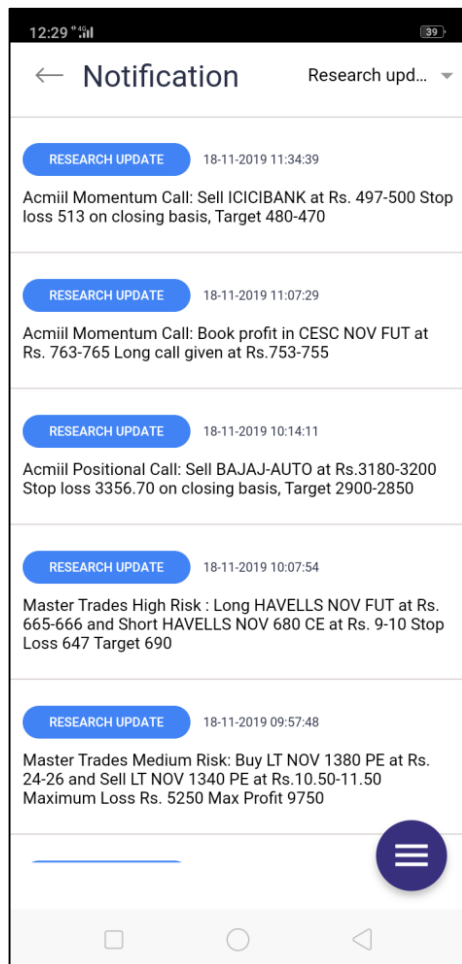
Even user have the option to filter the position as type of order update. Refer the image below:



1. **Order update** - It will give you over all order status which can be confirmed, modified, cancelled, rejected, partial etc.



2. **Research update** - Scripts recommended by ACMIIL research team will be shown and the user can Buy/Sell by clicking on particular update from the same screen as shown in the image below.



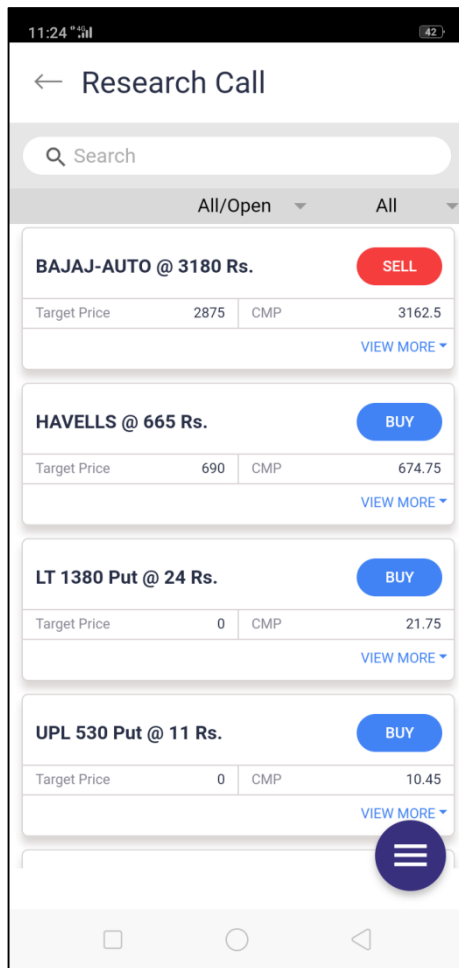
3. **Trade update** - It will show all the completed orders
4. **Risk updates** - You will receive notification from ACMIIL Risk department related to your buying & selling of securities..
5. **General Updates** - You will get general updates from ACMIIL w.r.t technical issue or system issue.

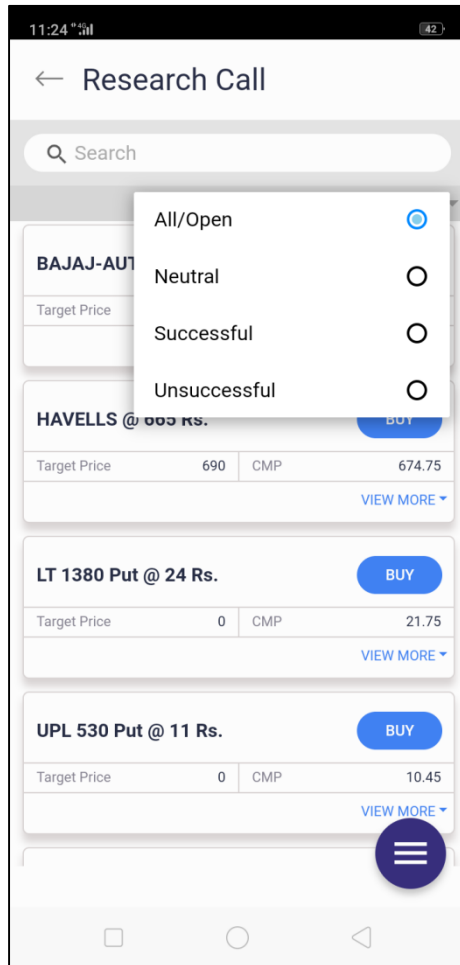
15. Research call

- **Research Call** - Scrips recommended by ACMIIL research team will be shown and the user can Buy/Sell from the same screen.

When user will click on buy/sell it will take you on order placement page.

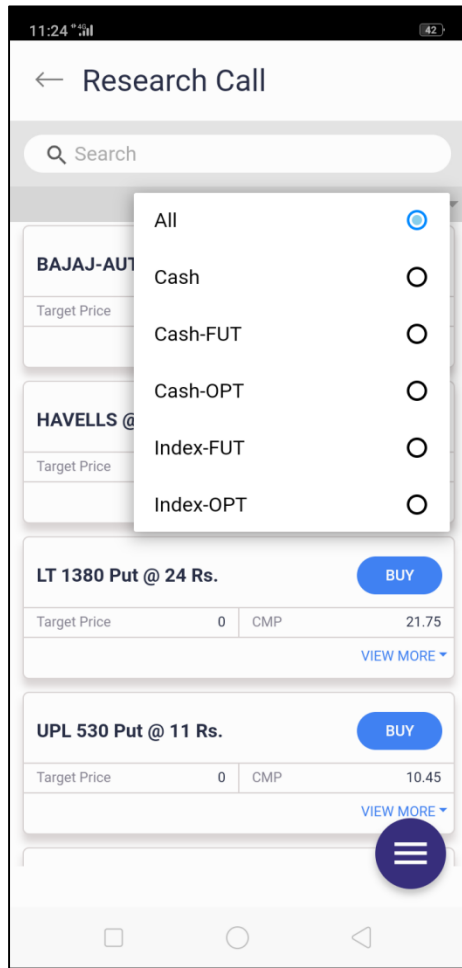
You can search the scrip of Research calls you want to trade in.





A filter for call status is given from where user can toggle between different call status.

- **Open** - It means you can still buy or sell the stock as per our recommendation because date is still not expired.
- **Neutral** - It means the scrips which you have buy/ sell their is no profit or loss done.
- **Successful** - It means whatever recommended stock you have purchased or sell and you gained through it on real time basis so its come under successful.
- **Unsuccessful** - It means whatever ACMIIL team recommended you that does not exist.



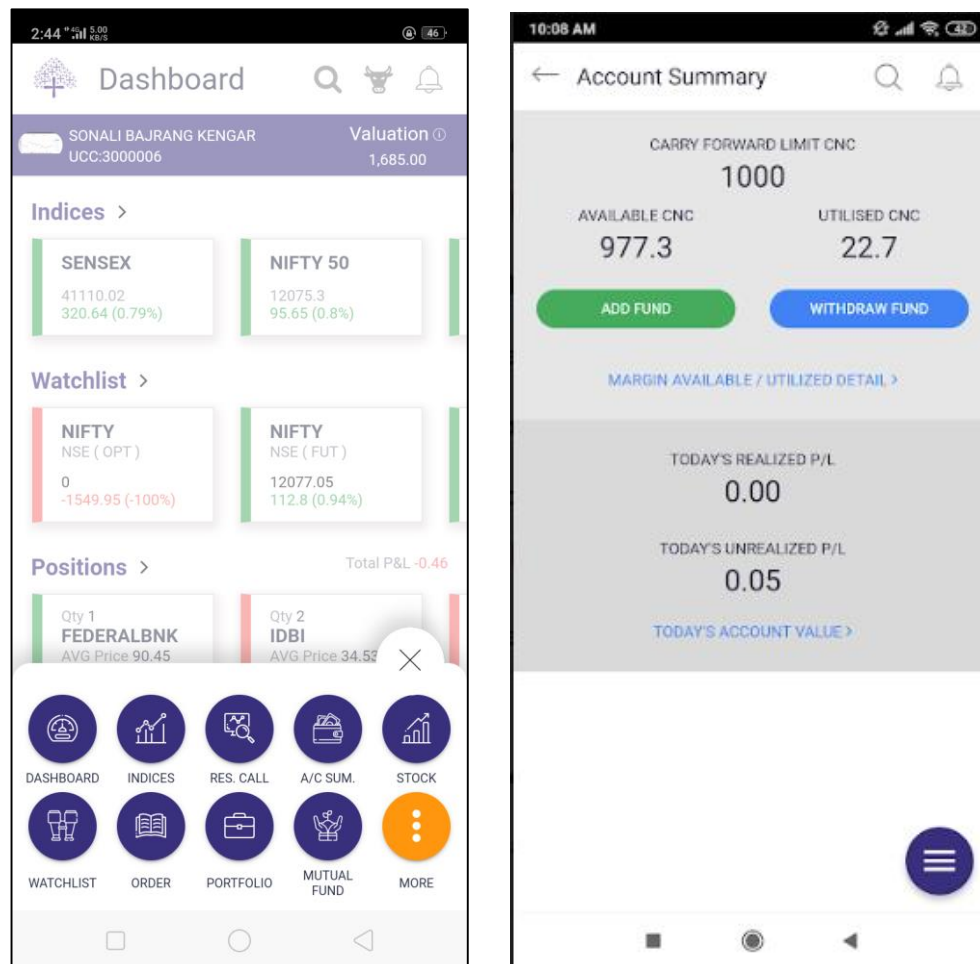
When you click on All tab you can toggle between different segments by using the different filter in research call for Cash, Cash-FUT, Cash-OPT, Index-FUT, Index-OPT.

16. Account Summary

Account summary helps to keep your track investment.

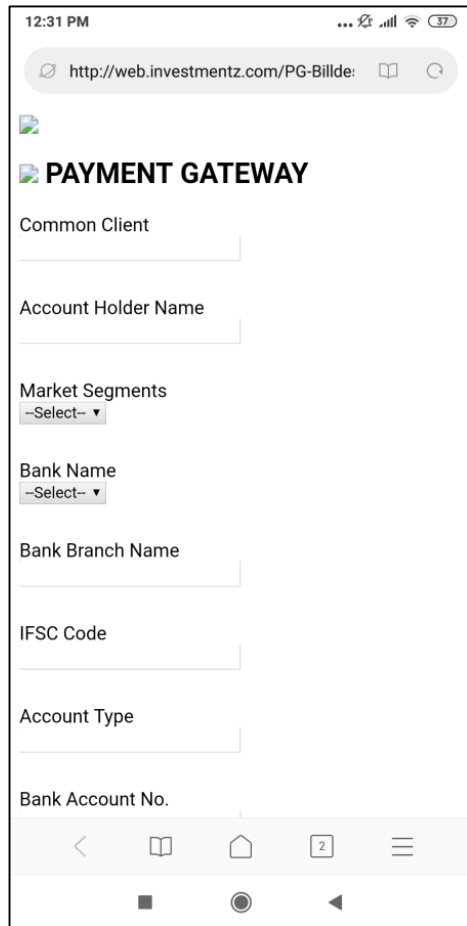
Click on account summary from menu.

Refer to the image below:



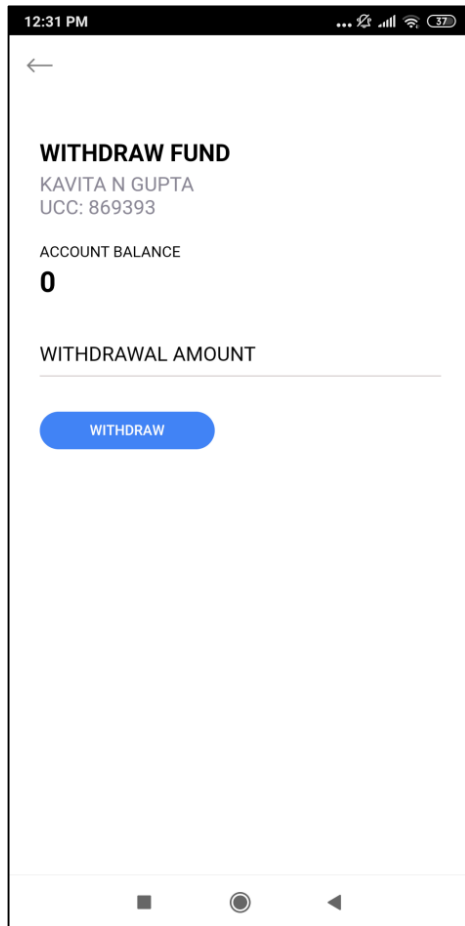
By clicking on add fund you will be landing on payment gateway page.

You can add fund by entering required necessary fields & click on save.



When you click on withdraw fund you will be landing on withdraw fund page as shown in the image below:

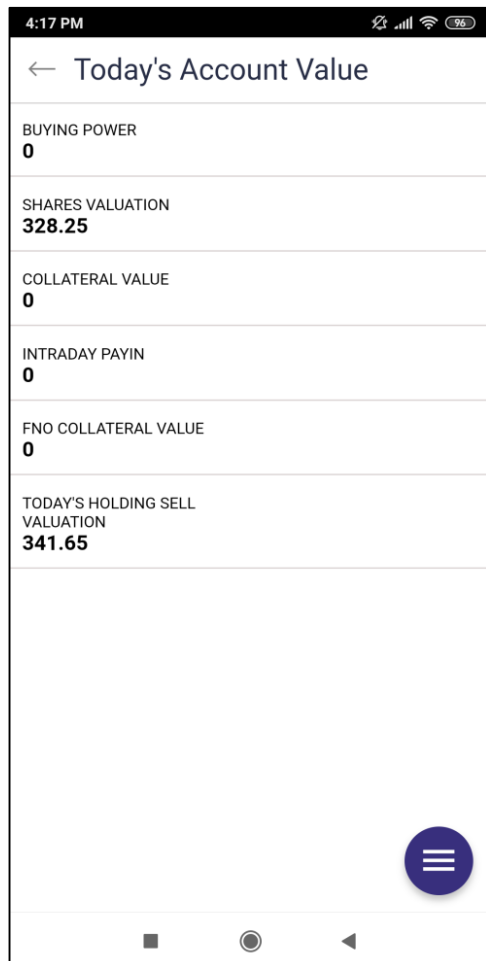
Enter the amount which you want to withdraw & click on withdraw icon.



- **Today's Realized P/L** - Today's realized profit/loss refer to profits or losses from completed transactions on particular trading day. Realized profit is already deposited into the trader's trading account, and it can be withdrawn from trading account to a bank account. Realized profit/loss is included in account balance in trading account statements.
- **Today's Unrealized P/L** - Unrealized P&L is the current profit or loss on an open position. The unrealized P&L is a reflection of what profit or loss could be realized if the position were closed at that time. The P&L does not become realized until the position is closed.

17. Today's Account Value

Today's account value gives the information about buying power, shares valuation, collateral value, intraday payin, FNO collateral value and Today's holding sell valuation.



The screenshot displays a mobile application interface titled "Today's Account Value". The interface shows a list of financial metrics with their respective values:

Metric	Value
BUYING POWER	0
SHARES VALUATION	328.25
COLLATERAL VALUE	0
INTRADAY PAYIN	0
FNO COLLATERAL VALUE	0
TODAY'S HOLDING SELL VALUATION	341.65

1. Buying Power

Buying power shows the total cash available to the trading account. If the user will transfer money from bank account to trading account today then it will reflect in Intraday payin table and next day it will be added in the buying power if not utilized. Cash present in ledger will be displayed in buying power.

2. Shares Valuation

Share valuation shows total value of the share available in the holdings as per previous day's closing price as per BSE.

3.Collateral Value

Collateral Value is the market value of equity shares used as collateral to support a loan or margin.

4. Intraday Payin

Intraday payin shows today's transferred amount from bank account to Trading account. For Example if a client transferred 1000 Rs. to his trading account then it will be reflected in intraday payin.

5. FNO Collateral Value

Collateral Value is the market value of FNO share used as collateral to support a loan or margin.

6. Today's Holding Sell Valuation

Your valuation of shares at which you have traded.

17.1 Margin Available

This table gives the information of available and utilized MIS, CNC and FNOC margin.

The image shows two side-by-side screenshots of a mobile application interface titled "Margin Available / Utilized". The left screenshot shows the "AVAILABLE MARGIN" tab selected, and the right screenshot shows the "UTILISED MARGIN" tab selected. Both screenshots display a list of margin categories and their respective values.

Category	Available Margin	Utilised Margin
CARRY FORWARD LIMIT CNC	341.65	
INTRADAY LIMIT	341.65	
FNO COLLATERAL VALUE	0	
AVAILABLE CNC	341.65	UTILISED CNC 0
AVAILABLE MIS	341.65	UTILISED MIS 0
AVAILABLE FNOC	0	UTILISED FNOC 0
EQUITY HAIR CUT(MIS) (VAR)		0
EQUITY CNC UTILISED		0
OPTIONS PREMIUM		0
TOTAL MARGIN		0
SPAN MARGIN		0
EXPOSURE MARGIN		0
ADHOC MARGIN 4%		0

1. Carry Forward Limit CNC (Cash and Carry)

Carry forward limit CNC is the manual limit given by RMS Department. If the client is using CNC to Buy/sell of shares then that shares can be carry forward. In carry forward limit CNC Buying power and intraday limit will be included.

2. Intraday Limit

Intraday limit is the limit given by the RMS Department for intraday trading (MIS). This limit is valid only for a particular day and at the end of the day share will be auto squared off.

3. FNO Collateral Value

Collateral Value is the market value of FNO shares used as collateral to support a loan or margin.

4. Margin Available CNC

Margin Available CNC shows available CNC(Cash and Carry) margin in trading account

5. Margin Utilized CNC

Margin Utilized CNC shows the CNC margin utilized by the client on that particular day. This can be also seen under “margin utilized details” tab.

6. Margin Available MIS (Margin Intraday Square Off)

Margin available MIS shows available MIS margin in trading account

7. Margin Utilized MIS

Margin Utilized MIS shows the MIS margin utilized by the client on that particular day.

8. Margin Available FNOC

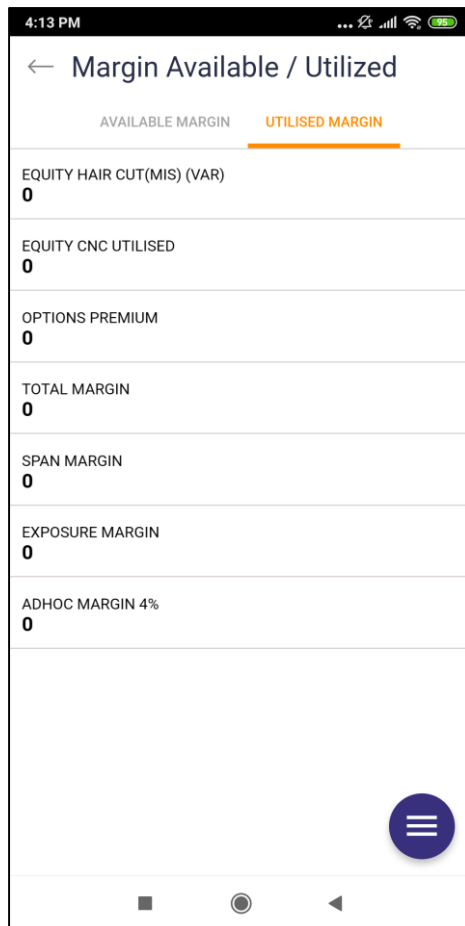
Margin Available FNOC shows available FNO margin in trading account.

9. Margin Utilized FNOC

Margin Utilized FNOC shows the FNOC margin utilized by the client on that particular day.

17.2 Margin Utilized Detail

Margin Utilized detail gives the information about equity hair cut (MIS) 20%, Equity CNC utilized, options premium, total margin, span margin, exposure margin, adhoc margin 4% .



AVAILABLE MARGIN	UTILISED MARGIN
EQUITY HAIR CUT(MIS) (VAR)	0
EQUITY CNC UTILISED	0
OPTIONS PREMIUM	0
TOTAL MARGIN	0
SPAN MARGIN	0
EXPOSURE MARGIN	0
ADHOC MARGIN 4%	0

1. Equity Hair Cut (MIS) 20%-

Equity hair cut shows the MIS margin utilized by the client in equity which will be 20 % of every order value.

Example - If product type is selected as MIS and value of equity 20 Rs. then only 4 Rs. will deduct from available MIS margin.

2. Equity CNC Utilized

Equity CNC utilized is CNC margin utilized by the client in equity.

3. Options Premium

It is the total value of option.

4. Total Margin

It is the sum of span margin, exposure margin and adhoc margin.

5. Span Margin

Span margin is an initial margin which is calculated on the basis of the risk and volatility of the underlying. The SPAN margin for a particular security keeps changing from time to time based on the volatility of the underlying. At end of every trading day, brokers are required to collect margin payable against open positions either on the buy side or on the sell side from its clients.

6. Exposure Margin

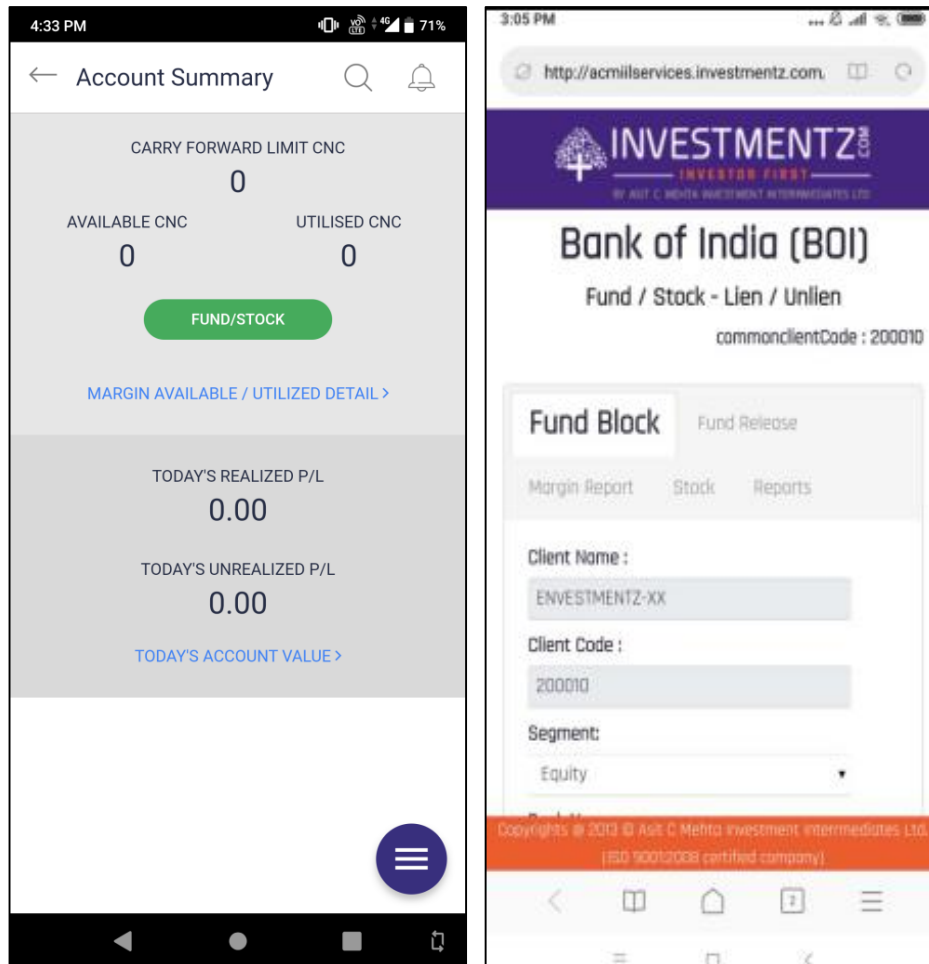
Exposure margin is the margin charged over and above the SPAN margin. The exchange asks brokers to make certain security available to it in the form of cash, bank guarantee or shares to safeguard against any default of payment against positions taken on a particular day.

7. ADHOC Margin 4%

The Sebi-prescribed Adhoc margins are imposed on brokers with very large position overall or in specific low price stocks which are illiquid.

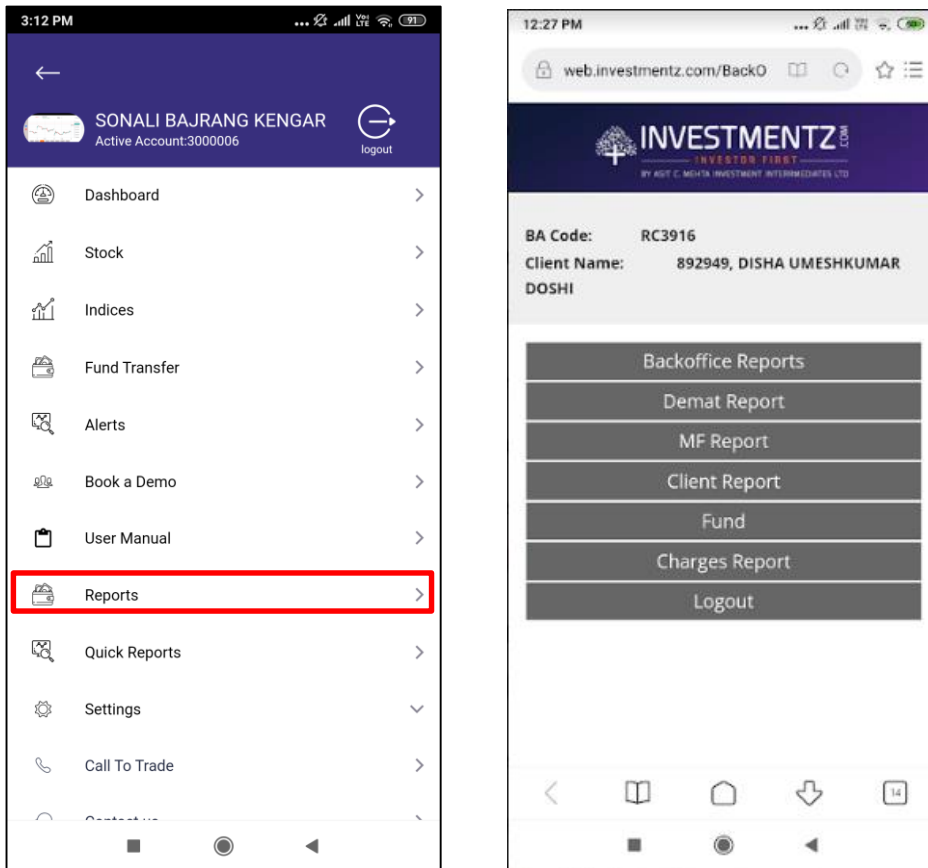
17.3 For Bank of India Client

When you click on fund/stock BOI client will directly land on fund stock lien/unlien page as shown in the image below.



18. Reports

Once you have logged into your account you will find all your reports under menubar section as shown in the image below.



The overview is to give you perspective about your Net Worth with ACMIL, which is further broken into three parts of cash market, Derivatives market & clear cash available. Profit & Loss section will show you all the activities you have done by buying & selling securities.

Holdings under various segments such as equities, mutual funds, Bonds etc.

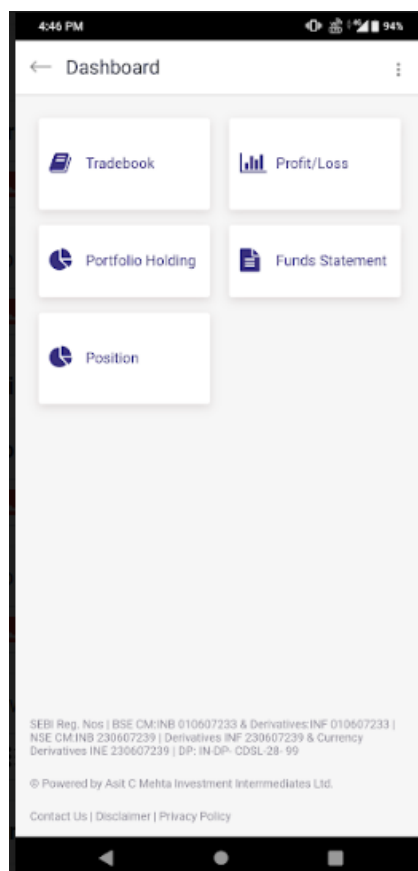
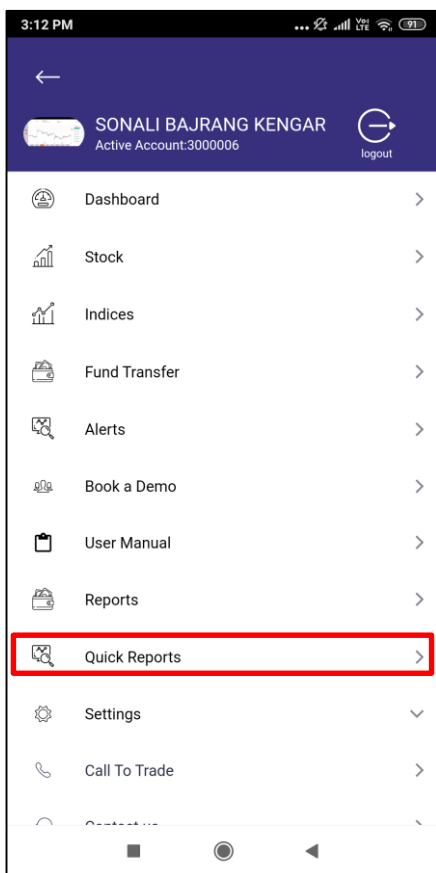
(Filters like date range and segments are available for convenience).

18.1 Quick Reports

By clicking on quick report you can view the following reports

1. Tradebook
2. Profit & Loss
3. Portfolio Holdings
4. Fund statement
5. Position (Visible for derivative account only)

(Filters like date range and segments are available for convenience).

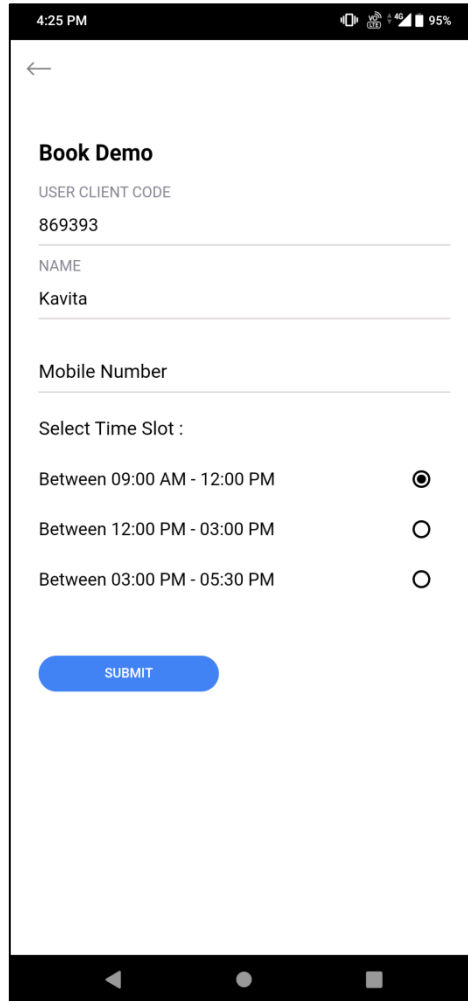
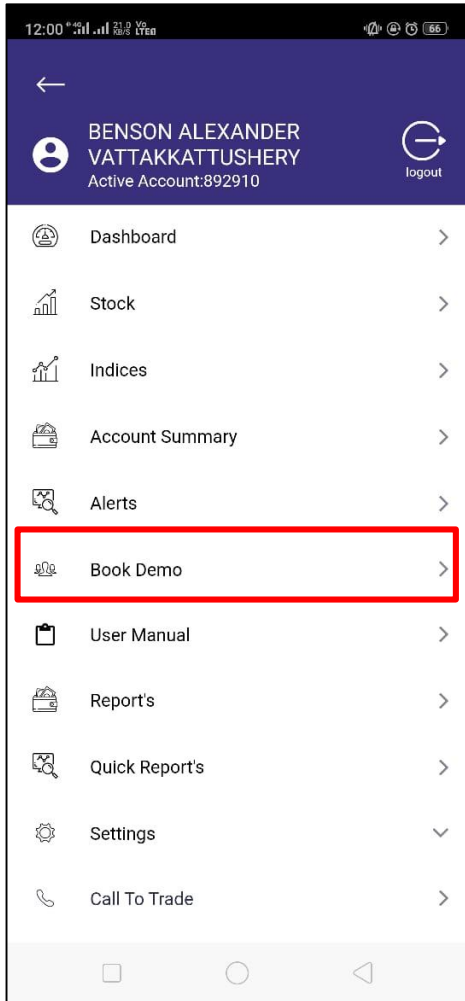


19. Book a Demo

You can book a demo by filling all the required necessary fields for which you will be given training w.r.t investmentz app & trading features.

19.1 With Login

From menu click on more & on clicking on more you will have access to detailed menu



19.2 Without Login

10:17 AM

INVESTMENTZ COM
INVESTOR FIRST
BY ASIT C. MEHTA INVESTMENT INTERMEDIATES LTD.

WELCOME TO INVESTMENTZ
Login to continue

Login Id [Forgot your Login id?](#)

Password [Forgot your password?](#)

LOGIN

Don't have an investmentz Account ?
[OPEN AN ACCOUNT](#)

Already have investmentz Account ?
[FIRST TIME LOGIN \(FOR NEW USER\)](#)

BOOK A DEMO

12:06

Book Demo

User Client Code

Name

Mobile Number

Select Time Slot :

Between 09:00 AM - 12:00 PM

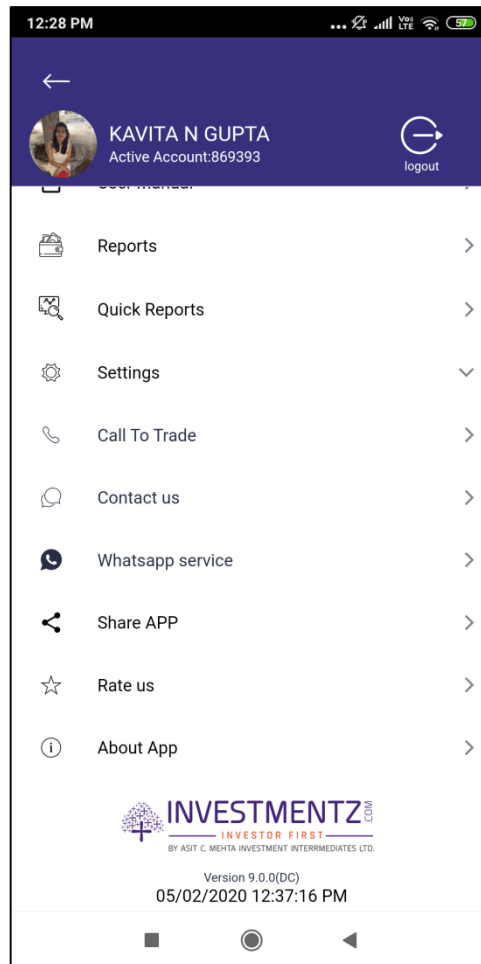
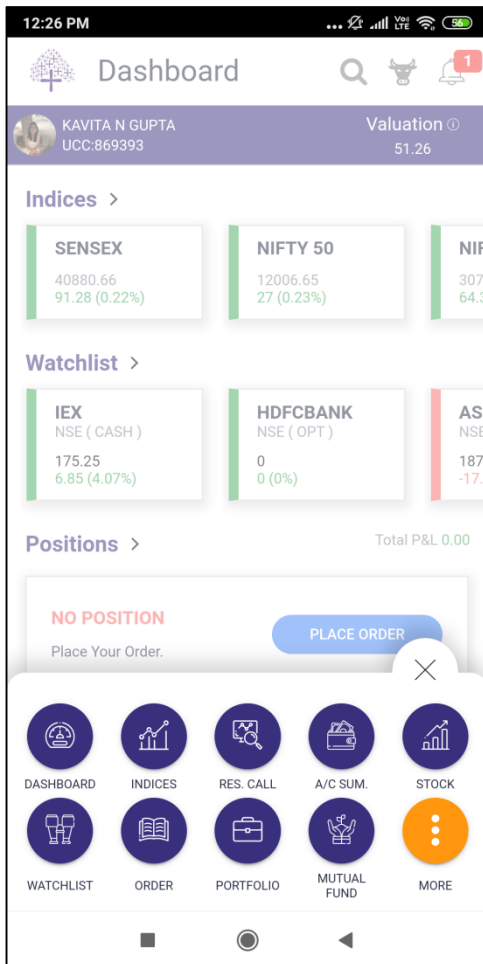
Between 12:00 PM - 03:00 PM

Between 03:00 PM - 05:30 PM

SUBMIT

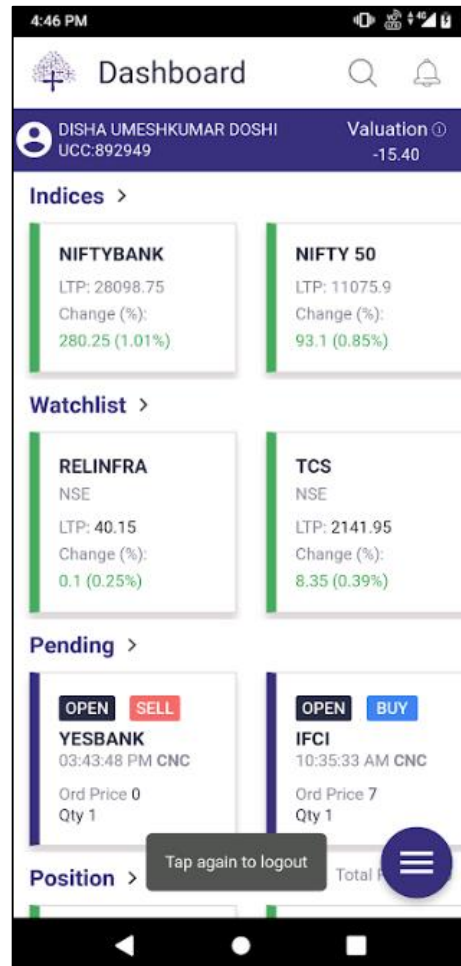
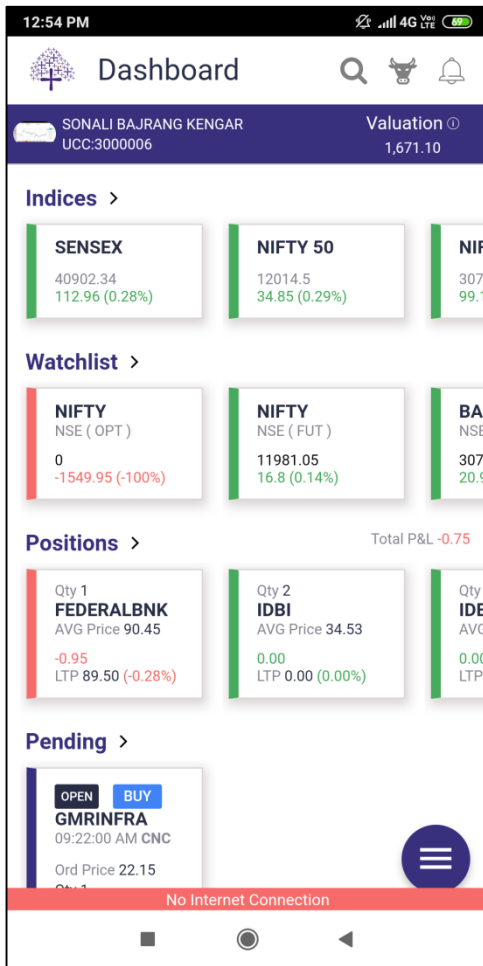
20. Logout

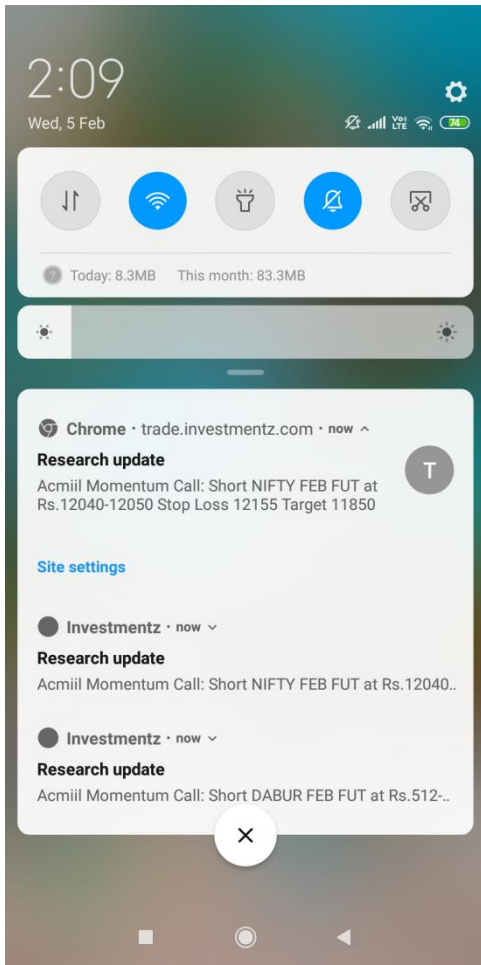
You can logout from the Menu or by pressing the back button of the mobile. Refer to the images given below:



If your internet connection is poor or the net gets off While using the app you will get a notification for the same

Confirmation for logout will be asked on pressing back button.





When you have switched from Investmentz to any other app without logout in that case you will receive notification on the notice bar of app.