
THE POWER OF 2 AT THE COST OF 1

भरोसा डबल, फायदे अनेक!



**Bringing the Best of Two Power Brands,
Making the Investors feel like a King.**

Strategic alliance between

Narnolia[®]

MOTILAL OSWAL



Mr Krishnanand Narnolia

Group Chairman & MD

Narnolia Group of Companies



Mr Motilal Oswal

Group MD & CEO

Motilal Oswal Financial Services Ltd.

Expressing his delight, said

“The immense trust of our clients and all stakeholders has made Narnolia the Largest Broking firm of the East and one of the Leading Research Advisors & Fund Managers in the country.

In this journey of 23 years, we spent over 15 golden years with Motilal Oswal. Our common values, ethical practices and mutual trust have kept this relationship going strong even during the short period of 2-3 years when we were competing with each other in Broking.

The recent changes in the Investment Advisory Act paved the way to reunite with Motilal Oswal for a much larger and deeper association this time which, I believe, would help our clients to get the best of both the brands under one roof, at no extra cost.”

Confident about this alliance, he added

“I have personally known Krishna ji for more than 15 years. I have experienced his passion and big thinking. I also admire his vision, strategy and ability to take bold decisions in the larger interest of the clients, employees, partners and the organization.

If I want some strong customer insight, he is the person I call upon.

I believe this reunion of the two organisations with 15 years of strong relationship based on trust, ethics and customer first approach will benefit the clients and all the stakeholders. My best wishes.”



Strategic Alliance between

Narnolia Financials Broking Arm of Narnolia Group of Companies & **Motilal Oswal**



From L to R: Harsh Joshi, Country Head - Investment Products and Ajay Menon, MD & CEO at MOFSL and Krishnanand Narnolia, CMD & Shailendra Kumar, Co-Founder & CIO at NSL.

Narnolia Financials and Motilal Oswal, the two leading full-service premium brokerage firms of the country, have announced the commencement of a Strategic Alliance between the two companies to offer the best of investment and trading experience to its clients and associates across the globe.

As part of this partnership:

- 👤 **Motilal Oswal will make Narnolia's industry-leading investment products available to all of its clients across the country and abroad, through both online and offline networks, while**
- 👤 **all the clients of Narnolia Financials will exclusively use the globally renowned products & brokerage services of Motilal.**

The entire operations will continue to be managed by the existing branches and team of Narnolia under the membership license of Motilal Oswal.

Further, all the clients served by the network of Narnolia will continue to exclusively enjoy all of its research and advisory including the research based recommendations on stocks and Mutual Funds, Portfolio analytics, research reports etc in a personalized way, at no extra cost.

"Collaborate, not Compete for the benefits of the Clients"

the alliance as termed by the two power brands will help clients and distributors get the best of both brands under one umbrella, at no extra cost. This initiative further reinforces Narnolia's core objective of being 'Client First' and commitment to keep adding value to investors and stakeholders at large.

All clients of Narnolia Financials will exclusively use the globally renowned brokerage services and products of Motilal Oswal.



TradeGuide Signal (TGS)

TradeGuide Signal is an innovative trend guiding tool which automatically generates actionable Buy/Sell trading ideas for all asset classes



Advice on Combination of Equities (ACE)

Experience the new era of Investing through ACE (Advice on Combination of Equities) – our diverse range of pre-packaged equity products, ideal for Traders & Investors who want to participate in the markets but don't have enough time to manage their portfolio



Portfolio Restructuring Tool (PR)

Bad portfolios always carry higher risks and tend to impact not only your clients' investments but also revenue and turnover for your business. Portfolio Restructuring Tool provides personalised insights on your clients' portfolios, thus helping them reduce risks and increase potential returns



Suggest Me

Suggest-Me helps your clients take suitable investment decisions to fulfil their needs by recommending a suitable portfolio based on their investment horizon and style.



Me-gold

Me-Gold powered by MMTC –PAMP, is the purest form of gold (999.9) which your clients can securely buy, sell or store with an option of doorstep delivery, anytime and anywhere. Your clients can even opt to start a GSP (Gold Savings Plan) with Me-Gold



Option Express

Option Express is a series of strategic option calls which provides both single-leg and multi-leg strategies on a daily basis to help active traders make quick and wellinformed decisions that give positive results



Option Strategy Builder

An innovative tool that makes it easy for traders to plan their trades with live spread updates and execute them at pre-defined Entry and Exit price levels without manual intervention



Sensibull

Sensibull is a dynamic platform for tracking and trading in the most profitable options contracts in the market. It is designed to help you find and execute the best possible options strategies as per your views on selected options contracts



Power Trade

A new and intuitive single-screen menu that helps your clients place multiple orders in different scrips across segments and square off open positions in 1 click. It also gives real-time and Total MTM updates on your clients' individual and overall positions


Over 30+ Years of
Experience in Equity Markets


100+ Awards and
1 million Happy customers


Free Dedicated Advisor to
Help Buy/Sale Shares


Dedicated and Advanced Online
Platforms for Investors & Traders
with all the technical, fundamental,
derivative tools and views.


Customized Advisory Products
and Services for Traders and
Investors with separate reports for
each and combined.


Solid Advice for Investing
across Equity, Commodity,
Currency, Mutual Funds, Bonds,
IPO, Insurance and much more.


Invest in US markets, Accumulate
shares of your choice through Stocks
SIP Stocks SIP, loans against
securities in various forms etc


Online training by experts on
technicals, fundamentals,
derivatives, investing and
trading strategies etc.

All the clients served by the network of Narnolia will continue to exclusively enjoy all of its research and advisory services in a personalized way at no extra cost.

19 Daily Reports

- 👤 Pre market analytics and views on economy, global and Indian markets, index and stocks
- 👤 Investment and trading calls with industry leading success ratio on stocks, index, commodity and currency based on Narnolia's unique QQTDE research Model which includes - Qualitative fundamental, Quantitative, Technicals, Derivatives and Events/ News research
- 👤 Post market update: to have an at a glance view of the day and its implications on future price movements

5 Weekly Reports

- 👤 Important market events which can have impact on markets
- 👤 Weekly analytics and outlook on markets and economy including the top research ideas
- 👤 Weekly sum up of all the events of the week

3 Monthly Reports

- 👤 Sector and stock updates based on the prevailing economic and market conditions
- 👤 Roll over and other data which can have impact on the market and stocks

5 Quarterly Reports

- 👤 Pre quarterly Results preview on the stocks
- 👤 Post result updates and views on sectors and stocks
- 👤 Strategy notes based on macro and micro indicators having implications on market over 1/2 years

16 Opportunity Based Reports

- 👤 Narnolia's famous Portfolio Analytics report known as SDR
- 👤 IPO, Buyback, event updates, company and industry updates, macro developments, management meet updates etc
- 👤 Momentum Investment calls: Fusion, R25, STDC, Qunat etc

Advisory Services

- 👤 F0 Position Driven Advice
- 👤 Specific Trade Advice
- 👤 Advisory Notes
- 👤 Training to Channel
- 👤 Training to Client
- 👤 Query-one to one
- 👤 WhatsApp Query
- 👤 Campaign

Narnolia, under its holding company Narnolia Securities Limited, will continue to fully own and manage other businesses namely, Fund Management, Wealth Management, Investment Advisory, Mutual Funds, Investment Banking, Insurance Broking, NBFC etc.

Narnolia Securities Limited is Eastern India's Largest Premium Full-Service Brokerage firm and one of the leading names in Fund Management, particularly in the Model Portfolio space. Narnolia is known for its industry-leading performance of Equity and Mutual Fund research and advisory, based on its proprietary QQDTE model. Narnolia is also known for providing services of global standards locally, in a customised and personalised way through the best of its human capital.

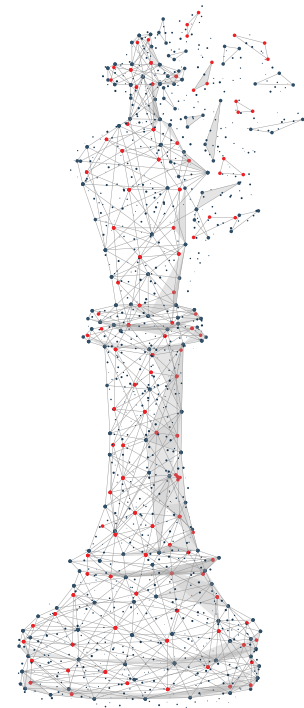
Largest brokerage firm of the east, yet the personal touch of a boutique firm.



Trust of 23 years based on strong ethical and financial standards.

Team of over 200 Relationship Managers and leaders, the largest and the most experienced, with average employment age of over 10 years with the company.

Research Products and services, recognised by the industry leaders, now available to u at no extra cost.



Recognised by the Industry Leaders



Most Consistent Portfolio Manager of the Country 2018 by BSE Tefla's



India's Most Promising Brand 2017 by WCR

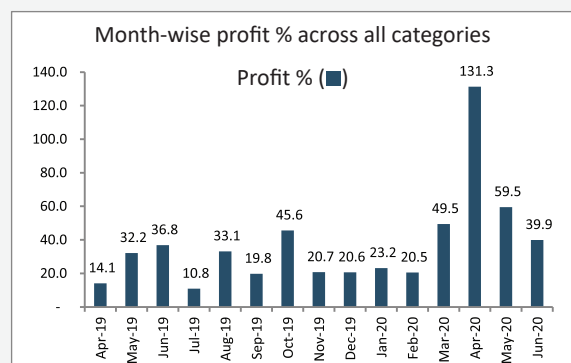


Inspirational Leader 2018 by WCR in London

Over two decades of focused research on 1600+ stocks and 2000+ MF schemes has led to generation of **287% of absolute returns in the last 5 years, with Assets under Custody & Management (AUCM) growing 41 times.**

Our Success Ratio

| Type of Calls | FY 19-20 | Apr-20 | May-20 | Jun-20 |
|---------------|----------|--------|--------|--------|
| All | 4,362 | 496 | 450 | 470 |
| Intraday | 1,597 | 181 | 165 | 150 |
| BNST/STBT | 1,533 | 175 | 152 | 198 |
| Short Term | 46 | 1 | - | 8 |
| Options | 1 | 47 | 24 | 33 |
| Strategy | 305 | 38 | 44 | 17 |
| Commodity | 222 | 35 | 47 | 46 |
| C Options | 509 | - | - | - |
| C Strategy | 8 | - | - | - |
| Currency | - | 19 | 18 | 18 |
| R10 | 141 | - | - | - |



1. Is Motilal Buying out Narnolia?

No. Narnolia Financials, the largest Premium Full Service Brokerage firm of the East and Motilal Oswal, the leading Full Service Premium Brokerage Firm of the country - the two most powerful brands of the country has entered into a Strategic Alliance to bring the best of investment and trading experience to its clients and its Partners. As per the understanding between the two, Motilal will make available Narnolia's industry leading investment products through its both online and offline network to its clients across the country, while Narnolia will merge its broking business with Motilal which will help the clients of Narnolia to continue to get Narnolia's industry leading retail research along with all the premium services of Motilal.

Narnolia will continue to operate its Fund management, wealth management, Investment Advisory, Institutional Research, Mutual Fund, Investment Banking and B2B digital platform 'Alphanest' for the IFAs across the country – in the name of Narnolia Securities Ltd.

This synergistic relationship will help the clients and its distributors to get the best of both under one umbrella at no extra cost and efforts. This initiative further reinforces the groups' commitment to keep adding value for its investors and all other stakeholders.

2. Do I need to open a fresh account in MOFSL? If yes what is the process? If not, how will my account get transferred? Is there any document (POA / Nach etc.) that needs to be submitted and are there any charges?

No. Your existing Demat & Trading account shall be transferred on a given date to MOFSL along with its open FO positions & Demat holdings. All Credit/debit in your trading account has to be settled before the cut off date

3. If not will there be any notification or approval taken from me?

Yes, you shall be given a 30 days notice in case you do not wish to transfer your account. However we see no reason for you to discontinue as you shall be getting the best of 2 brands at the same cost.

4. Will my Trading and DP account No. Remain the same?

Yes, If you do not have a trading or demat account with MOFSL. If you do all the positions & stocks will migrate to your existing MOFSL account.

5. I also have an account in MOFSL with the same Account No but a different DP Account No. What will happen in such cases?

Your Credentials with MOFSL shall be valid.

6. I also have an account with MOFSL with a different account no? Will both the accounts be operative? If not what will happen to these accounts? Will they be merged or will one account remain?

Refer to response 4,5

7. I gave a closure request to MOFSL to close my account when I shifted my account to Narnolia but they did not close and kept debiting DP charges? Who will be liable for these charges post Merger?

We request you to send the copy of that acknowledged closure request. We shall try to find the best solution in this case.

8. Will my DP scheme be the same as in Narnolia?

Yes

9. Are there any changes in the charge structure in MOFSL?

| | |
|--|--|
| a) Brokerage | Same as current with Narnolia |
| b) Minimum per Order Brokerage | Rs. 25 per Delivery and Rs. 12 per Trading |
| c) DP Scheme | Same as current with Narnolia |
| d) Statutory Charges | On Actual As per the charges levied by Regulatory |
| e) FO Pledging and Release Custodian Charges? | Rs. 10 Per ISIN. It is a part of DP Scheme |
| f) Clearing Charges | As per Exchange |
| g) Stamp Duty Charges? | As per regulatory Changes |
| h) Are minimum per contract note charges also applicable? | Answer Missing |
| i) Share release charges from pool? | As per DP Scheme |
| j) Contract note bounce Charges | Answer Missing |
| k) Cheque Bounce Charges? | Rs. 250 or 0.10% whichever is higher |
| l) Trading Account Maintenance Charges? | Rs. 299 per month |
| m) Physical Documentation / Contract Note Charges? | NIL |
| n) Any other charges applicable for any reason in the clientele account? | Margin Short Penalty - Actual as per exchange STT, Stamp duty, Transaction charges - Actual as per exchange Auction charges: 0.50% |
| o) What are the interest charges and what is the system to debit interest? | 19.50% p.a. on Effective debit balance subject to maximum of 24% annually. |
| p) do we need to pay penal charges for the 50% cash margin requirement in FO if margin given by means of security? | Yes |
| q) Are there any interest charges on DP debits? | Yes, presently 19.5% p.a. |

10. Will my brokerage terms remain the same in MOFSL?

Yes, Covered.

11. Will my relationship manager change or remain the same?

Your RM/Franchisee will be the same, all branches of NFAL will become MOFSL branches and Franchisee will be MOFSL franchisee.

12. Will I be serviced from the same branch or not?

Yes, you shall be serviced with the same branch/ Franchisee and people.

13. In case there is a location change what is the address of the new office?

This shall be intimated to you in case of change.

14. Please provide me with contact details (phone and email id) of the customer care and other relevant departments / personele in case of any changes in the existing one?

Customer care & RMS number and people shall remain the same.

15. Will my backoffice remain the same or change?

Will change.

16. In case the same is changed how can I get access to my historical data?

Need to contact Narnolia Financial.

17. Will my trading software (Desktop / Mobile) change?

You will have to login to MOFSL app and web platform after the closing date.

18. In case the same changes will there be any cost for the new software?

No charges to access Back Office view from Online login or Mobile App.

19. How will I get the training on the new software?

You can contact your RM or customer care number for the same

20. What will the new emergency trading desk numbers be in case it is different from the current one?

Customer Service Desk No. 022-40548000 and 022-67490600

21. In case the RMS is different from Narnolia what are the terms of RMS in the below terms?

Please find attached the RMS policy of MOFSL.

a) Margins applicable for CM/FO/Currency/Commodity?

In Cash Segment minimum upfront 20% of value And for Derivatives upfront VAR + ELM.

b) Inge Norms?

Cash Segment = T+2+5 and in Derivatives Segment = T+1+5.

c) Margin Shortfall Norms?

Answer Missing

d) RMS Squareoff Norms?

Non maintenance of said margin requirement

e) Intraday Squareoff Norms?

Intra-day products would be subject to square-off anytime between 3 pm to 3:15 pm.

f) Margin Shortfall penalty norms?

(A). If the margin is less than 1 lakh and the margin shortfall is less than 10% of applicable margin then, 0.5% of penalty is levied

(B). And in case if the margin exceeds 1 lakh or the margin shortfall exceeds 10% of applicable margin, then, 1% margin is levied on the margin shortfall.

(C). If a short/non-collection of margins for a client continues for more than 3 consecutive days, then a penalty of 5% of the shortfall amount shall be levied for each day of continued shortfall beyond the 3rd day of shortfall.

(D) If short/non-collection of margins for a client takes place for more than 5 days in a month, then a penalty of 5% of the shortfall amount shall be levied for each day, during the month, beyond the 5th day of shortfall.

(E) Notwithstanding the above, if short collection of margin from clients is caused due to movement of 3% or more in the Nifty 50 (close to close) on a given day, (day T), then, the penalty for short collection shall be imposed only if the shortfall continues to T+2 day.

g) Can i provide cheque for margin shortfall the next day and will my entry be made the previous day to avoid margin shortfall?

Not permitted, client has to ensure upfront margin as said above.

h) are there any other RMS products available to us for trading?

Answer Missing

22. Do we have MTF or NBFC Funding in MOFSL? If yes how can we avail the same?

Yes, you can avail MTF or LAS both. Contact your RM.

23. How will my current MTF / Las account shift to MOFSL books?

No debits or credits shall be transferred.

24. How do we make payments to MOFSL for our obligations?

Through their payment gateways in app or online.

25. Need bank details of MOFSL to transfer via cheque or online transfers?

CMS details will be provided.

26. Will my NACH given need to be changed if yes what is the process?

Yes, your RM shall guide you for the same.

27. In case my payment is made, do we need to be intimate to the RM / MOFSL department for entry and RMS? If yes whom to inform ? Please provide contact details?

This is part of the normal day to day process.

28. If I pledge my shares for Margin how will the same be transferred to MOFSL?

You will have to sign a POA in favour of MOFSL, your RM shall explain this to you. However your stocks shall be unpledged by Narnolia & transferred to your account with MOFSL.

29. Will I have different accounts for Equity / Commodity / Currency?

No, MOFSL has a single account, however the segment has to be activated.

30. Will the same margin be applicable for all segments?

Please Refer to the MOFSL RMS policy.

31. Is there any other mode of delivery from DP such as OTP based if POA is not given?

Yes, clients can use OTP authorisation option.

32. Will MOSL send new slip books to us? If yes are there any charges for the same? If not how do I get the delivery slips when required including pledge?

Yes DIS booklet will be provided. Also the client has an option for E-DIS. Rs. 100 will be charged per New DIS book.

33. What about Mutual Funds / Model Portfolio / PMS / Insurance?

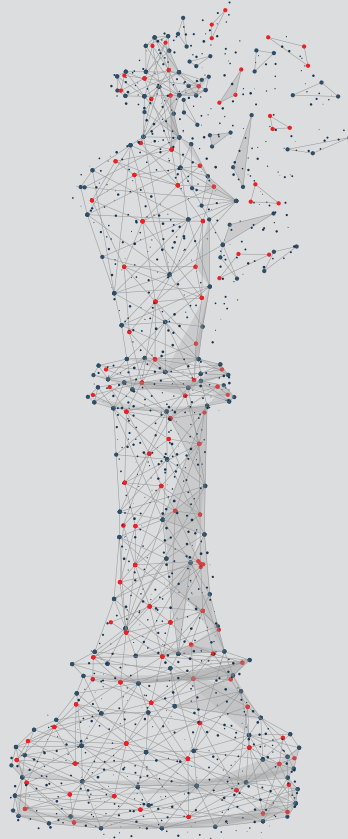
Narnolia Model Portfolios are available on MOFSL platform, your existing Model portfolios will be shifted with your Demat & Trading account. However your Mutual Fund & PMS will continue with Narnolia.

34. What will happen to my investments for the above with Narnolia?

Any balances with clients' demat Account would be shifted as it is to MOFSL. And if any outstanding positions in F&O will be shifted to MOFSL on the day of Effective date.

35. Who will take care of the same and whom to contact for the servicing of the same?

Narnolia's team will continue to service you dedicatedly for your Investment products.



Narnolia®

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Registered Office

Narnolia Financial Advisors Ltd.

236B-AJC Bose Road, 2nd Floor, Marble Arch Building, Kolkata - 700020, West Bengal

care@narnolia.com | Call: 1800-103-7212 / 022-6839-1234/35

NARNOLIA FINANCIAL ADVISORS LTD. is a SEBI REGISTERED STOCK BROKER-INZ000166737 (NSE/BSE/MSEI), DEPOSITORY PARTICIPANT- IN-DP-380-2018 (NSDL/CDSL), MERCHANT BANKER-INM 000010791, SEBI REGISTERED PMS- INP000006420, SEBI Registered RESEARCH ANALYST- INH 300006500, AMFI REGISTERED MF DISTRIBUTOR- ARN 3087, CIN- U51909WB1995PLC072876. Regd office: Marble Arch, 2nd Floor, Office 201, 236B, A J C Bose Road, Kolkata 700 020, Phone 033 40501500 Correspondence Office: 703-803, Wing A, Kanakia Wall Street, Chakala, Andheri, Mumbai 400093, Phone 022 68391200.

Investment in Securities Market is subject to Market risks. Read all the related documents carefully before investing. Past performance may not be indicative of future results and no promise or guarantee can be given for the same. For detailed disclosures & disclaimers please refer to our website at www.narnolia.com

*Narnolia Financial Advisors Ltd. has applied for transfer of business to Motilal Oswal Financial Services Ltd. subject to approval from exchanges/depositories.