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1.Introduction

Investmentz Trading is what we call our trading platform.

Presently on Investmentz, you can trade in Equity, F&O and Currency on NSE & BSE.

Investmentz works well on Windows and the version for MAC/LINUX is currently not stable. This would require internet speeds of at least 256 kbps and 512 Kbps for optimum performance.

2. Login

To login in trading platform click on the given link

<https://trade.investmentz.com/Web/WebForms/Login.aspx> and a login page will be open.

Look at the image below

INVESTMENTZ
INVESTOR FIRST
BY ADT C. MEHTA INVESTMENT INTERMEDIARIES LTD

LOGIN
To continue with Investmentz

Login Id
Password

First Time Login? Forgot your password?

Login

For assistance in Login, Call Customer Service Desk 022-28584545
Login Help

NEW TO INVESTMENTZ?
Get instant access to a wide range of investment solution

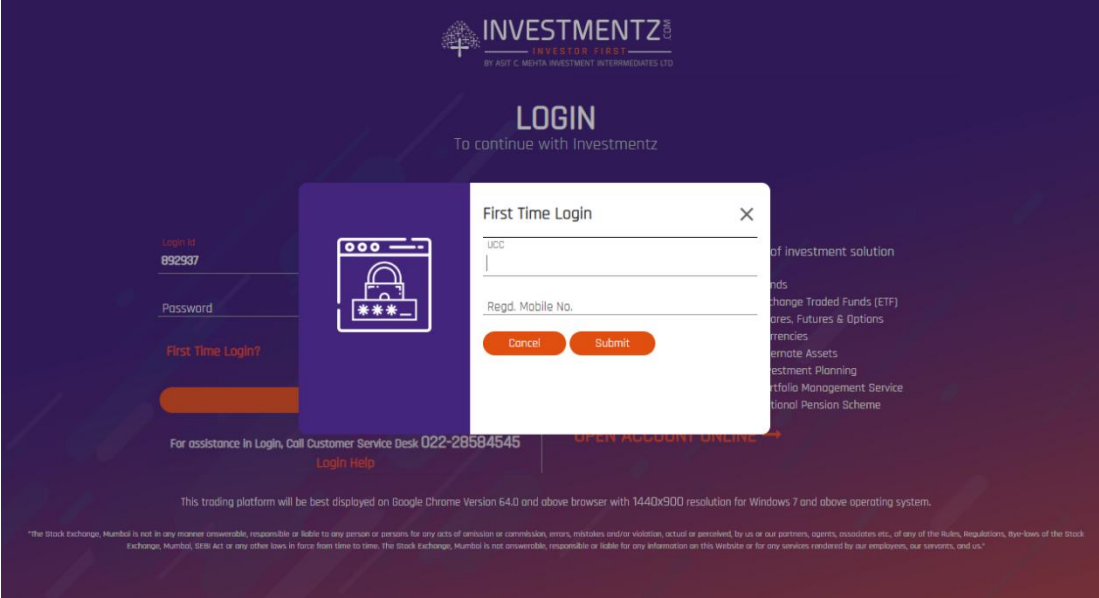
- Equity Baskets
- Initial Public Offering (IPO)
- Offer for Sale (DFS)
- Top Mutual Fund
- Tax Saving Funds
- New Fund Offer
- Corporate Fixed Deposit
- Non-Convertible Debentures
- Bonds
- Exchange Traded Funds (ETF)
- Shares, Futures & Options
- Currencies
- Alternate Assets
- Investment Planning
- Portfolio Management Service
- National Pension Scheme

OPEN ACCOUNT ONLINE →

This trading platform will be best displayed on Google Chrome Version 64.0 and above browser with 1440x900 resolution for Windows 7 and above operating system.

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Step 1: If the user is login for the first time to our trading platform then they have to click on first time login from the above page to create their login id, password and M-Pin. You will have to enter the UCC (user client code) which you would have received with the registration kit. 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:

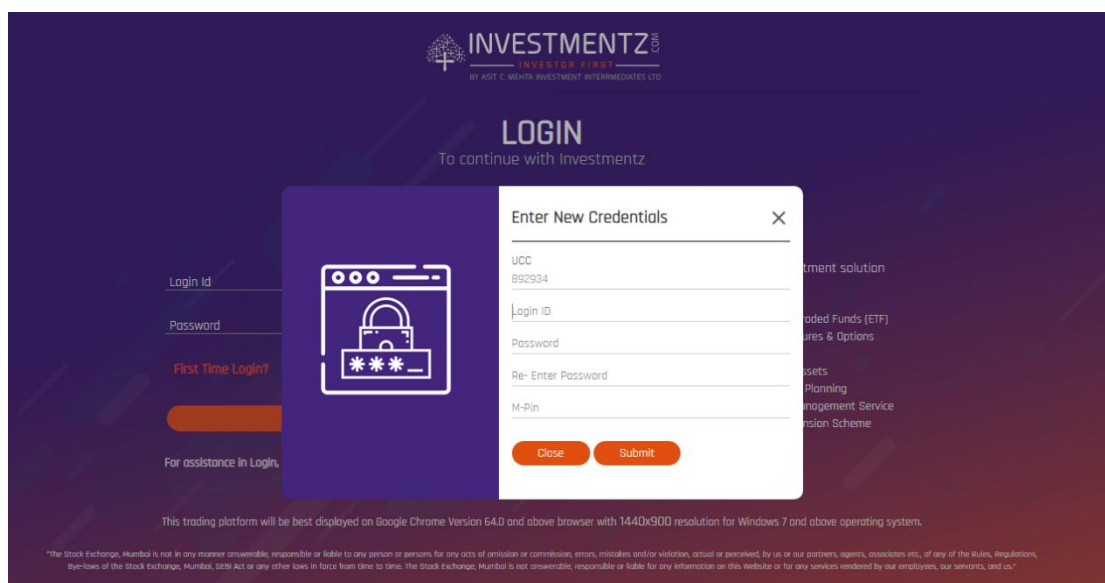


The screenshot displays the Investmentz login interface. At the top, the logo reads 'INVESTMENTZ.COM' with the tagline 'INVESTOR FIRST' and 'BY ASIT C MENTHA INVESTMENT INTERMEDIATES LTD'. Below this is a 'LOGIN' section with the text 'To continue with Investmentz'. A modal window titled 'First Time Login' is open, featuring a lock icon and two input fields: 'UCC' and 'Regd. Mobile No.'. The modal has 'Cancel' and 'Submit' buttons. In the background, the login form includes fields for 'Login Id' (with the example '892937'), 'Password', and a 'First Time Login?' checkbox. A customer service number '022-28584545' and a 'Login Help' link are visible. A disclaimer at the bottom states: 'This trading platform will be best displayed on Google Chrome Version 64.0 and above browser with 1440x900 resolution for Windows 7 and above operating system. *The Stock Exchange, Mumbai is not in any manner answerable, responsible or liable to any person or persons for any acts of omission or commission, errors, mistakes and/or violation, actual or perceived, by us or our partners, agents, associates etc., of any of the Rules, Regulations, bye-laws of the Stock Exchange, Mumbai, SEBI Act or any other laws in force from time to time. The Stock Exchange, Mumbai is not answerable, responsible or liable for any information on this Website or for any services rendered by our employees, our servers, and us.*'

Step 2: 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 for any reason you didn't receive the OTP you can click on Resend OTP, you will receive the OTP on the registered mobile number and you have to enter the OTP in the given space as shown in the image below :

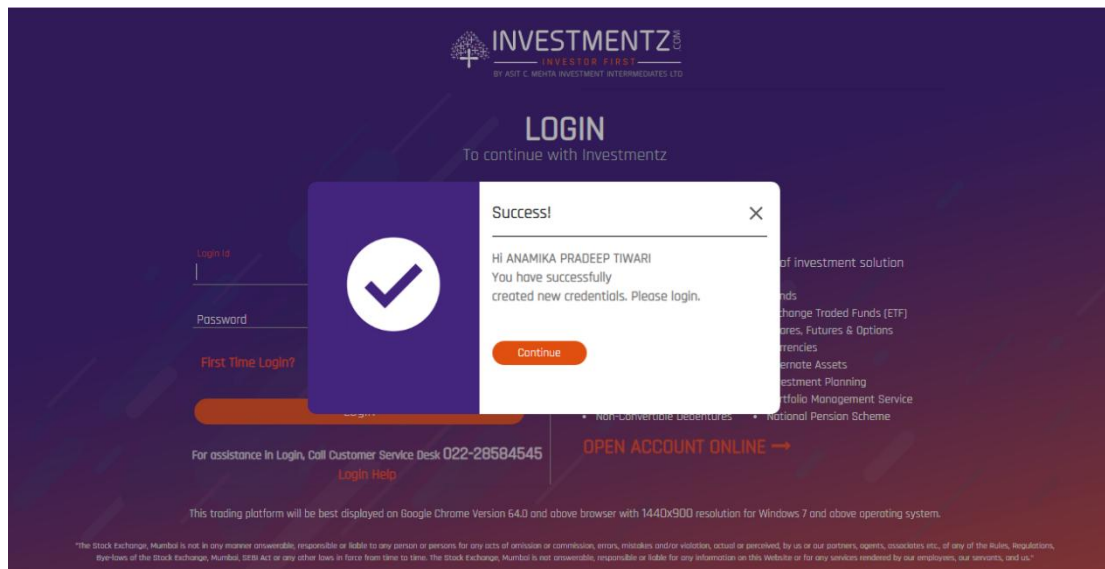
The screenshot displays the Investmentz login interface. At the top, the logo 'INVESTMENTZ.COM' is visible, with the tagline 'INVESTOR FIRST' and 'BY ASIT C. MEHTA INVESTMENT INTERMEDIATES LTD'. Below the logo, the word 'LOGIN' is prominently displayed, followed by the text 'To continue with Investmentz'. On the left side, there are input fields for 'Login Id', 'Password', and a 'First Time Login?' checkbox. A modal window titled 'First Time Login' is open in the center, featuring a lock icon. The modal contains a welcome message 'Welcome ANAMIKA PRADEEP TIWARI', a prompt to enter the OTP, a 6-digit input field, and a countdown timer showing '180 Seconds'. Below the input field, there is a 'Resend OTP' link and a message 'Please enter OTP you have recieved!!'. At the bottom of the modal are 'Cancel' and 'Submit' buttons. To the right of the modal, a list of services is visible: 'of investment solution', 'nds', 'Change Traded Funds (ETF)', 'pres, Futures & Options', 'urrencies', 'Remote Assets', 'Investment Planning', 'Portfolio Management Service', and 'National Pension Scheme'. At the bottom of the page, there is a footer with contact information: 'For assistance in Login, Call Customer Service Desk 022-28584545' and a 'Login Help' link. A disclaimer at the very bottom states: 'This trading platform will be best displayed on Google Chrome Version 64.0 and above browser with 1440x900 resolution for Windows 7 and above operating system. *The Stock Exchange, Mumbai is not in any manner answerable, responsible or liable to any person or persons for any acts of omission or commission, errors, mistakes and/or violation, actual or perceived, by us or our partners, agents, associates etc., of any of the Rules, Regulations, Bye-laws of the Stock Exchange, Mumbai, SEBI Act or any other laws in force from time to time. The Stock Exchange, Mumbai is not answerable, responsible or liable for any information on this Website or for any services rendered by our employees, our servants, and us.*'

Step 3: The UCC will be Auto filled. Investmentz allows its users to create their own Login id. A password needs to be entered which should be 8-15 string Alphanumeric, you have to Re-Enter the same password for confirmation. As you can see Investmentz have a secure login for which it follows 2-factor authentications. You have to enter a 4-digit M-pin every time you login. Look at the image below:

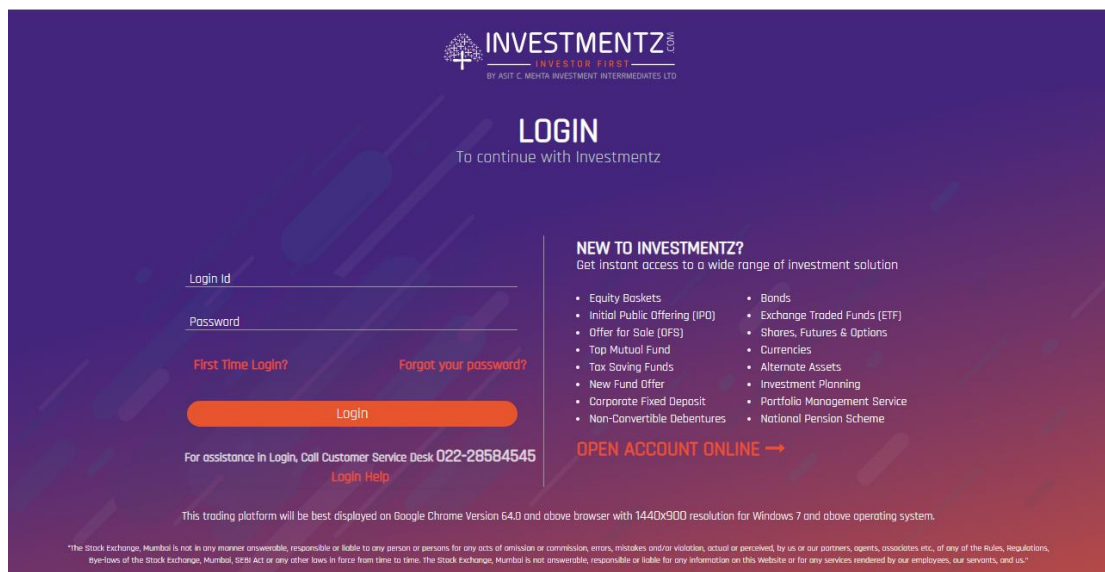


The screenshot displays the Investmentz login page. At the top, the logo reads "INVESTMENTZ" with "INVESTOR FIRST" and "BY ADIT C. MEHTA INVESTMENT INTERMEDIATES LTD." below it. The main heading is "LOGIN" with the subtext "To continue with Investmentz". On the left, there are input fields for "Login Id" and "Password", a "First Time Login?" link, and a "For assistance in Login" link. A modal window titled "Enter New Credentials" is open in the center, featuring a lock icon and fields for "UCC" (pre-filled with "892934"), "Login ID", "Password", "Re-Enter Password", and "M-Pin". "Close" and "Submit" buttons are at the bottom of the modal. The background shows a sidebar with links like "Investment solution", "Loaded Funds (ETF)", "Futures & Options", "Assets", "Planning", "Management Service", and "Insurance Scheme". A footer note states: "This trading platform will be best displayed on Google Chrome Version 64.0 and above browser with 1440x900 resolution for Windows 7 and above operating system." A disclaimer at the very bottom reads: "The Stock Exchange, Mumbai is not in any manner answerable, responsible or liable to any person or persons for any acts of omission or commission, errors, mistakes and/or violation, actual or perceived, by us or our partners, agents, associates etc., of any of the rules, regulations, bye-laws of the stock exchange, Mumbai, SEBI Act or any other laws in force from time to time. The Stock Exchange, Mumbai is not answerable, responsible or liable for any information on this Website or for any services rendered by our employees, our servants, and us."

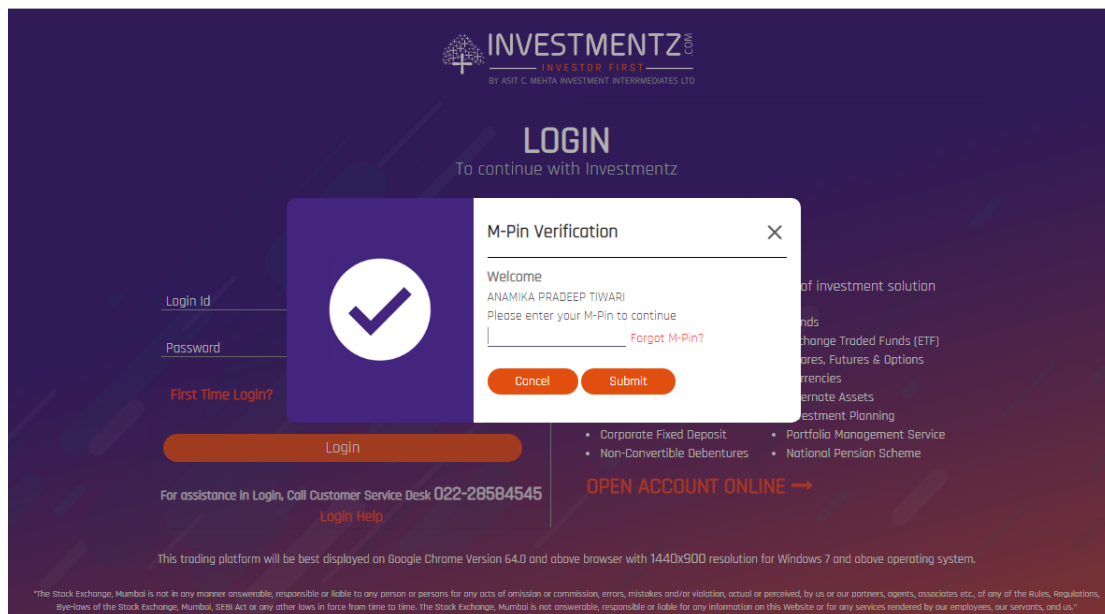
Step 4: After entering the required fields, a success message will pop up as shown in the image below:



Step 5: After completing the First Time Login process. You can login from the Investmentz Trading home page. 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:



Step 6: 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 in the required field you will be logged in as shown in the image below :

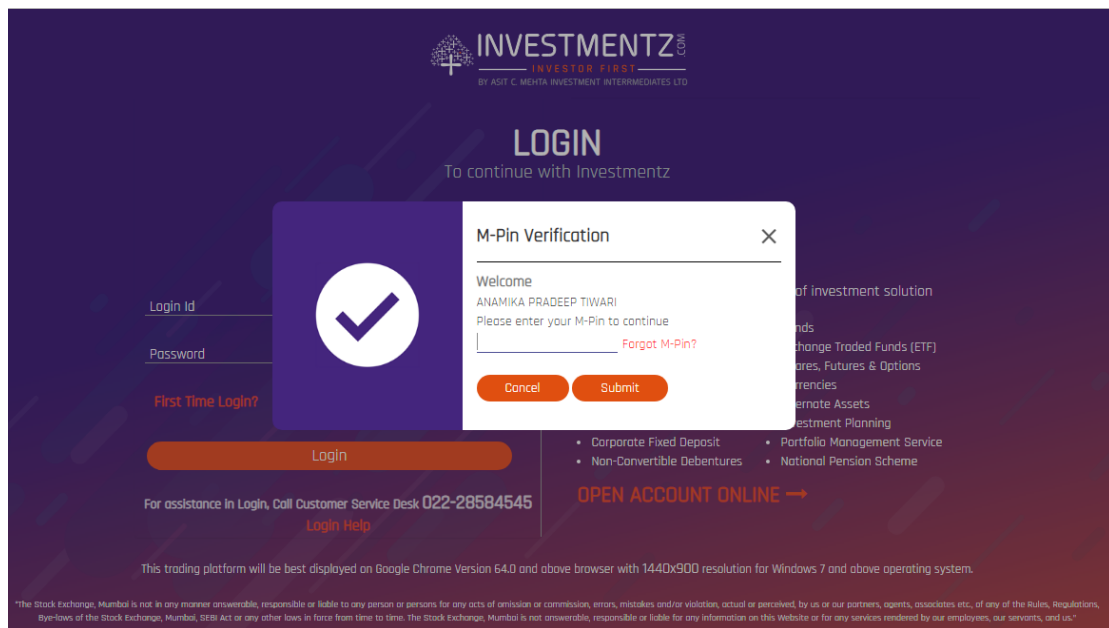


Post this step, you have successfully logged in to the Investmentz Trading portal and can begin trading.

2.1.Forgot M-Pin

If you have forgotten the M-pin you will not be able to login. You can reset your M-pin easily by following the below mentioned steps.

Step 1 : Click on Forgot M-Pin



The screenshot shows the Investmentz login interface. At the top, the logo 'INVESTMENTZ.COM' is displayed with the tagline 'INVESTOR FIRST' and 'BY ASIT C. MEHTA INVESTMENT INTERMEDIATES LTD'. Below the logo, the word 'LOGIN' is prominently shown, followed by the text 'To continue with Investmentz'. The login form includes fields for 'Login Id', 'Password', and a 'First Time Login?' checkbox. A large orange 'Login' button is positioned below these fields. To the right of the login form, a modal window titled 'M-Pin Verification' is open. This modal contains a 'Welcome' message for 'ANAMIKA PRADEEP TIWARI', a prompt to 'Please enter your M-Pin to continue', and a 'Forgot M-Pin?' link. At the bottom of the modal are 'Cancel' and 'Submit' buttons. On the right side of the login page, a list of investment solutions is visible, including 'Corporate Fixed Deposit', 'Non-Convertible Debentures', 'Portfolio Management Service', and 'National Pension Scheme'. At the bottom of the page, there is a footer with a disclaimer and a note about the trading platform's compatibility with Google Chrome Version 64.0 and above.

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

LOGIN

To continue with Investmentz

Login Id
Password
First Time Login?

Login

For assistance in Login, Call Customer Service Desk 022-28584545
[Login Help](#)

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M-Pin Verification

Welcome
ANAMIKA PRADEEP TIWARI
Please enter your M-Pin to continue
[Forgot M-Pin?](#)

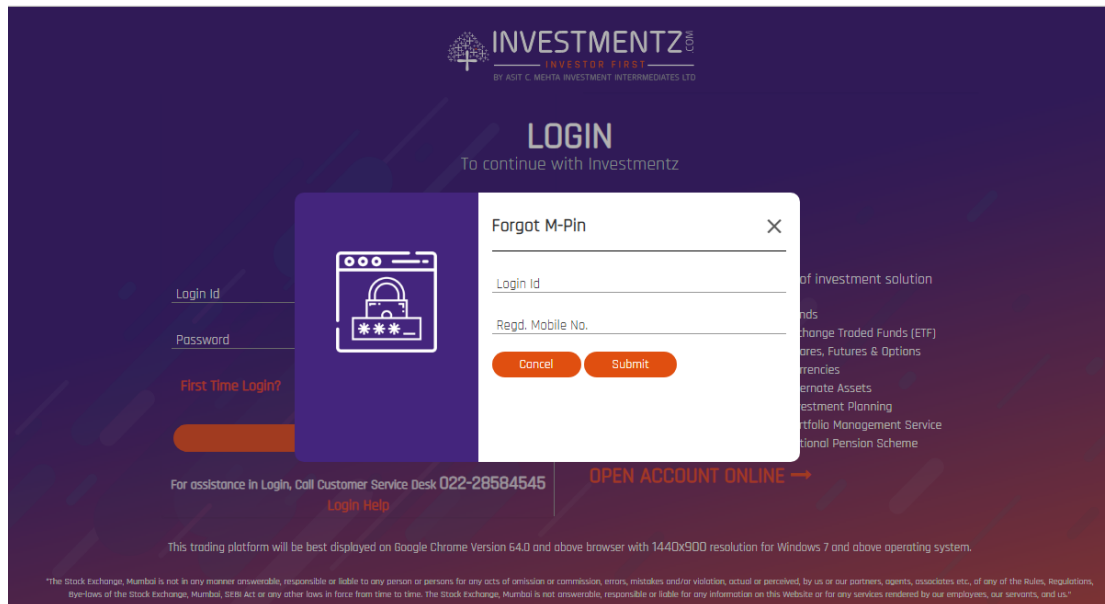
Cancel Submit

of investment solution
nds
change Traded Funds (ETF)
ures, Futures & Options
urrencies
ernate Assets
vestment Planning

- Corporate Fixed Deposit
- Non-Convertible Debentures
- Portfolio Management Service
- National Pension Scheme

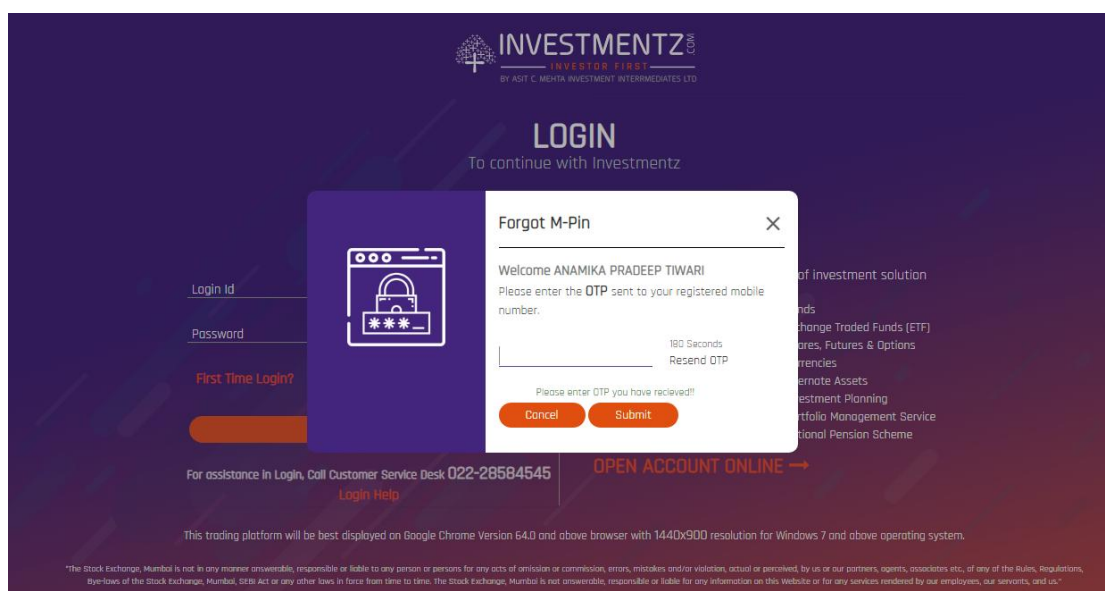
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Step 2 : After Clicking on forgot M Pin , you will be asked to provide Login Id and Registered Mobile Number as shown in the image below :



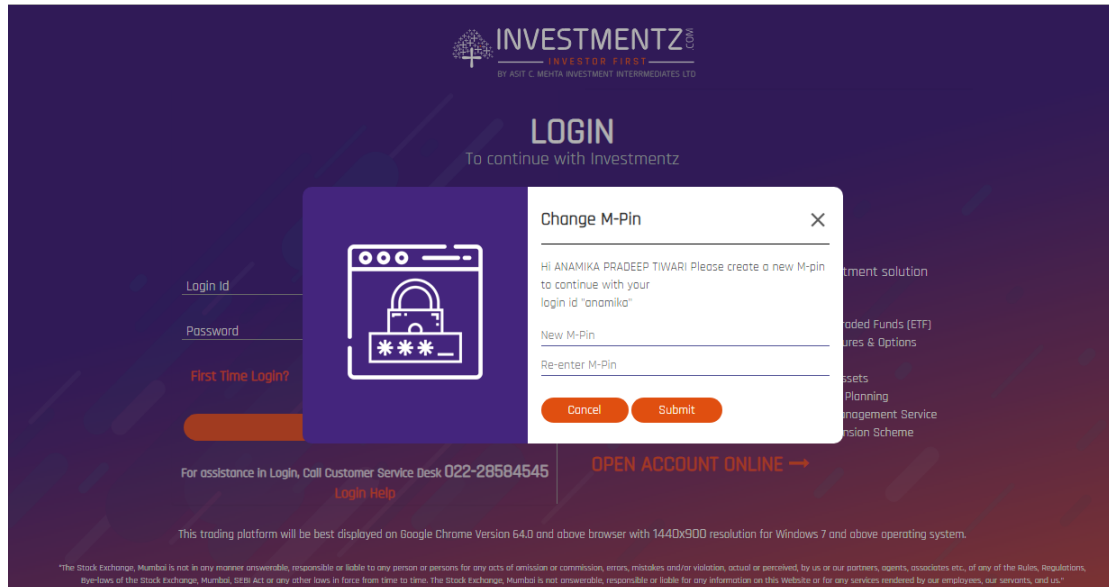
The screenshot shows the Investmentz login interface. The main heading is "LOGIN" with the subtext "To continue with Investmentz". On the left, there are input fields for "Login Id" and "Password", a "First Time Login?" link, and a "Login" button. A "Forgot M-Pin" modal is open in the center, containing input fields for "Login Id" and "Regd. Mobile No.", along with "Cancel" and "Submit" buttons. The background lists various investment services like "Exchange Traded Funds (ETF)", "Futures & Options", etc. At the bottom, there is a customer service desk number and a disclaimer.

Step 3 : You will receive 6 digit OTP on the Registered mobile number which you need to enter in the given space. The OTP will be valid for 3 minutes (180 seconds). If you don't receive the OTP you can click on Resend OTP. Look at the image below:

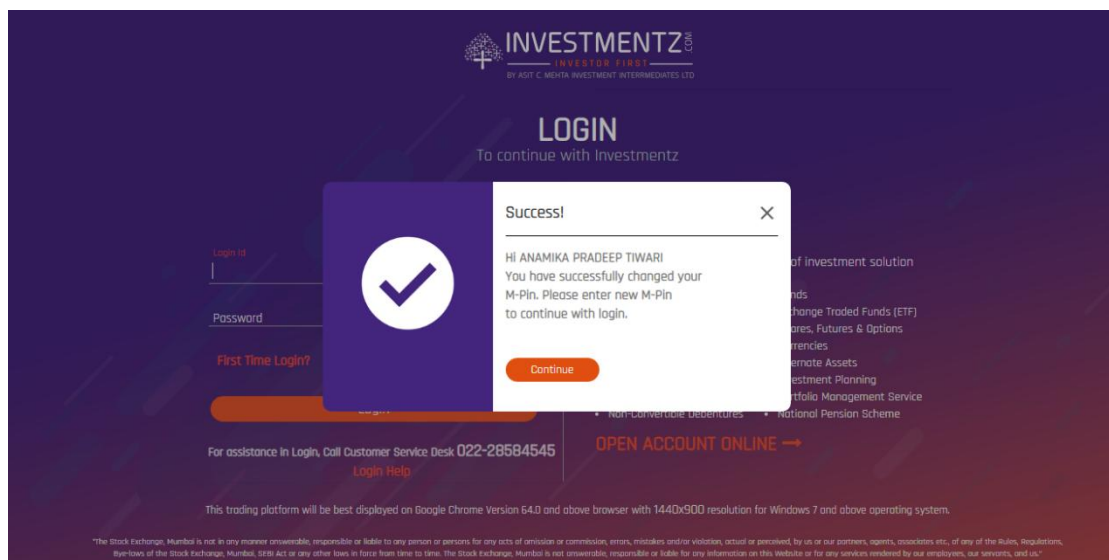


This screenshot shows the same login page as before, but the "Forgot M-Pin" modal is now at a different stage. It displays a welcome message "Welcome ANAMIKA PRADEEP TIWARI" and asks the user to "Please enter the OTP sent to your registered mobile number." There is an input field for the OTP, a "180 Seconds" timer, and a "Resend OTP" link. "Cancel" and "Submit" buttons are at the bottom of the modal. The background and footer elements remain the same.

Step 4 : You can now create a new 4 digit M-pin. For confirmation you have to re-enter the M-Pin and click on submit as shown in the image below :



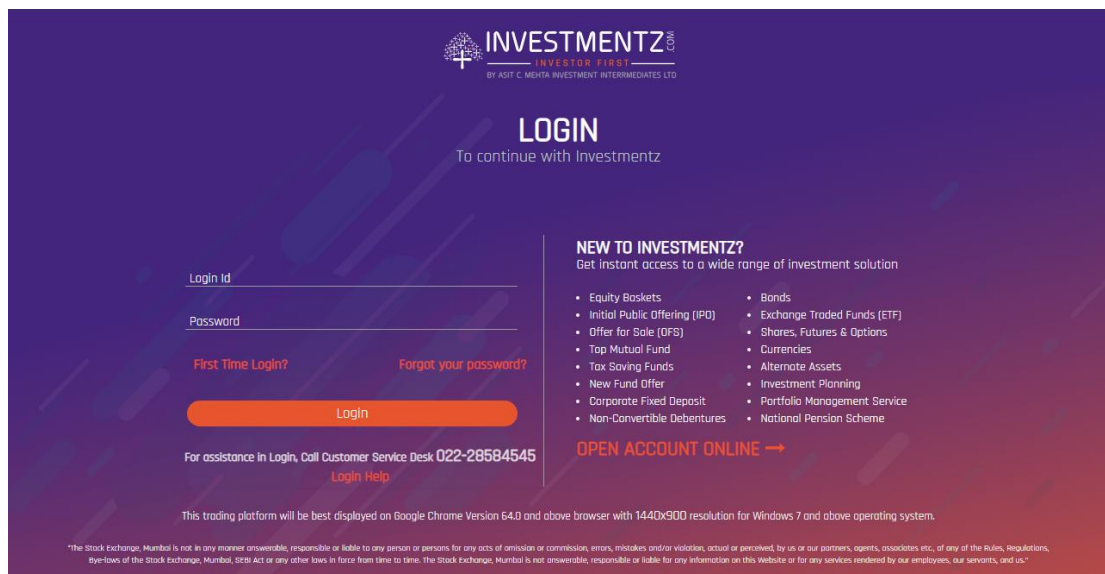
Step 5 : A confirmation message will pop-up on creating a new M-Pin successfully. Look at the image below.



2.2.Forgot Password?

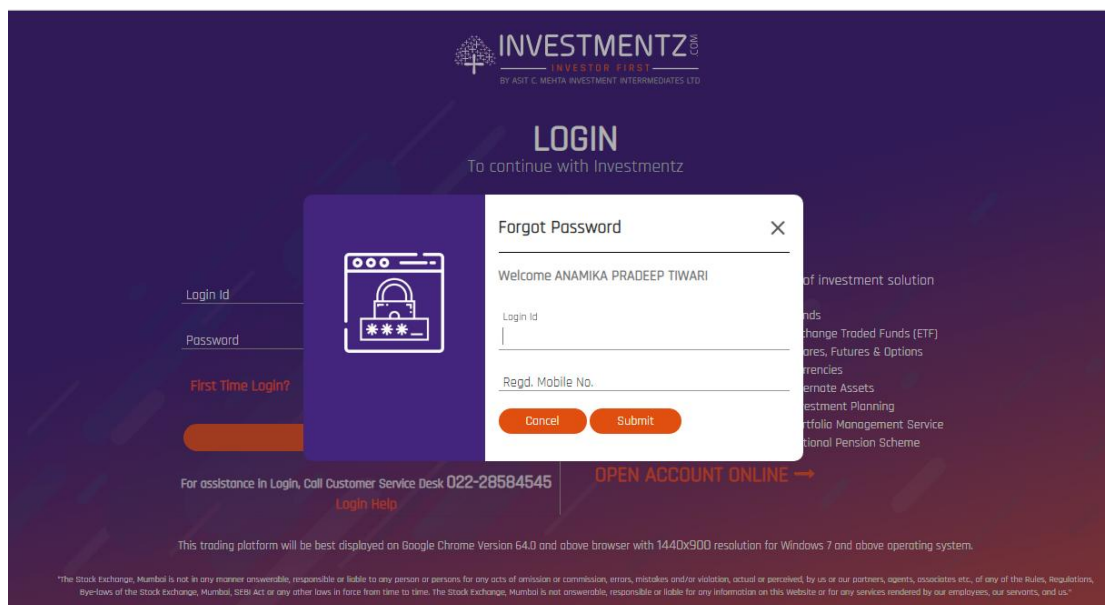
You can reset your passwords easily by following the below mentioned steps:

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



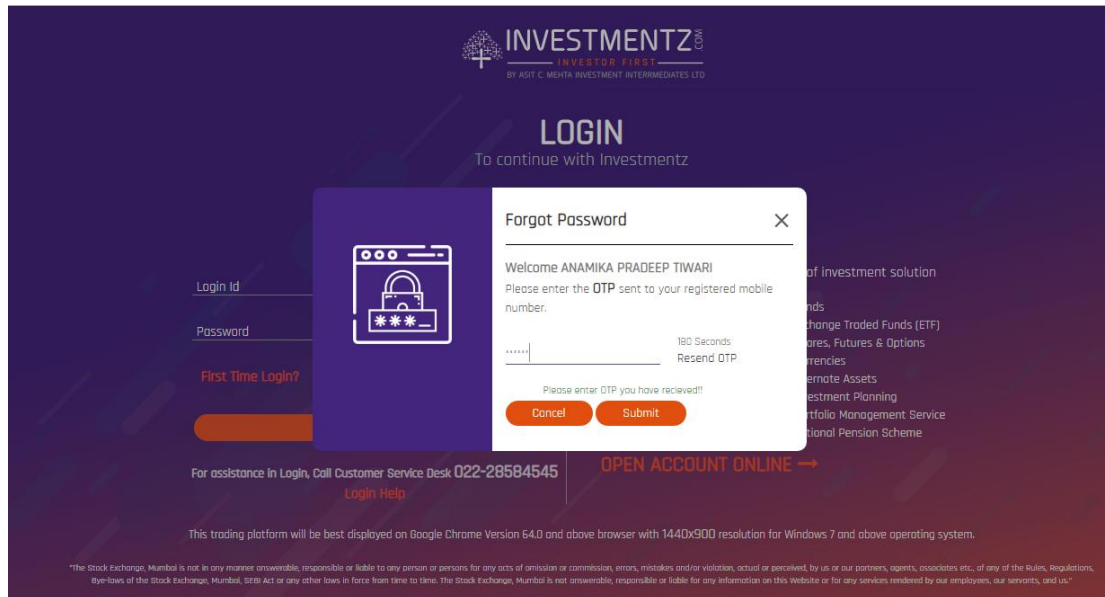
The image shows the Investmentz login page. At the top, the logo 'INVESTMENTZ' is displayed with the tagline 'INVESTOR FIRST' and 'BY ASIT C. MEHTA INVESTMENT INTERMEDIATES LTD'. Below the logo, the word 'LOGIN' is prominently shown, followed by the text 'To continue with Investmentz'. On the left side, there are input fields for 'Login Id' and 'Password', a 'Login' button, and links for 'First Time Login?' and 'Forgot your password?'. Below these, a customer service desk number '022-28584545' and a 'Login Help' link are provided. On the right side, a section titled 'NEW TO INVESTMENTZ?' lists various investment solutions: Equity Baskets, Initial Public Offering (IPO), Offer for Sale (OFS), Top Mutual Fund, Tax Saving Funds, New Fund Offer, Corporate Fixed Deposit, Non-Convertible Debentures, Bonds, Exchange Traded Funds (ETF), Shares, Futures & Options, Currencies, Alternate Assets, Investment Planning, Portfolio Management Service, and National Pension Scheme. An 'OPEN ACCOUNT ONLINE' link with a right arrow is also present. At the bottom, a disclaimer states: 'This trading platform will be best displayed on Google Chrome Version 64.0 and above browser with 1440x900 resolution for Windows 7 and above operating system. *The Stock Exchange, Mumbai is not in any manner answerable, responsible or liable to any person or persons for any acts of omission or commission, errors, mistakes and/or violation, actual or perceived, by us or our partners, agents, associates etc., of any of the Rules, Regulations, Bye-laws of the Stock Exchange, Mumbai, SEBI Act or any other laws in force from time to time. The Stock Exchange, Mumbai is not answerable, responsible or liable for any information on this Website or for any services rendered by our employees, our servants, and us.'

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

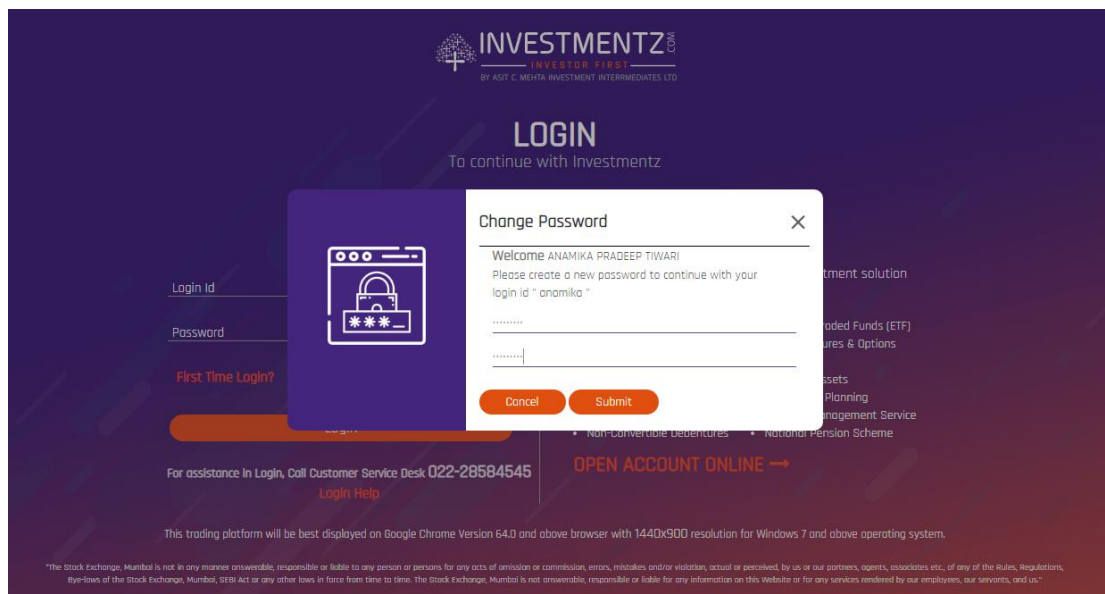


The image shows the Investmentz login page with a 'Forgot Password' modal window open. The modal window has a title bar with a close button (X). Inside, it says 'Welcome ANAMIKA PRADEEP TIWARI'. There are input fields for 'Login Id' and 'Regd. Mobile No.', followed by 'Cancel' and 'Submit' buttons. The background login page is partially visible, showing the same fields and links as in the previous image. The disclaimer at the bottom is also visible.

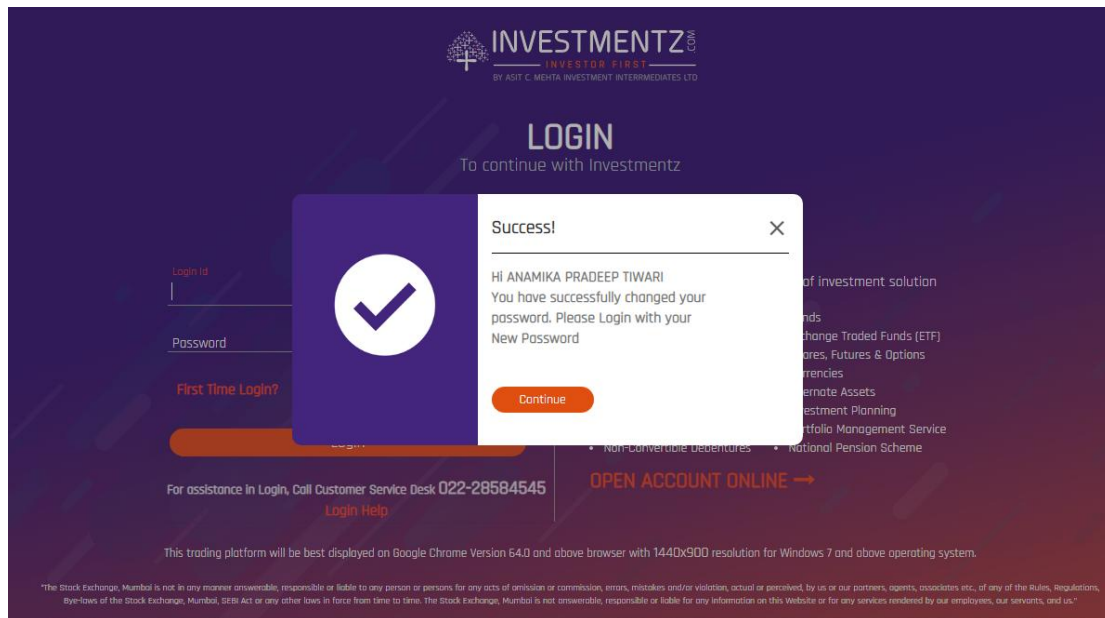
Step 3 : You will receive 6 digit OTP on the Registered mobile number which you need to enter in the given space. The OTP will be valid for 3 minutes (180 seconds). If you don't receive the OTP you can click on Resend OTP. Look at the image below:



Step 4: You can now create a new 8-15 string alphanumeric password. For confirmation you have to re-enter the password and click on submit as shown in the image below:



Step 5: A confirmation message will pop-up on creating a new password successfully. Look at the image below:

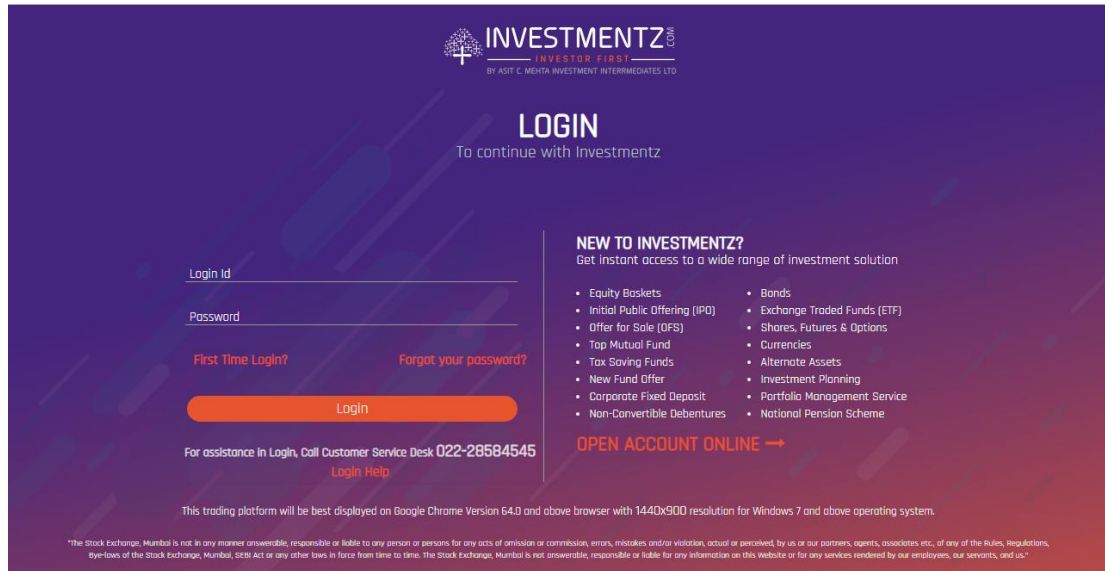


2.3.Force Logout

In case you have already logged into your account and have forgotten to logout or have closed the trading tab on your browser without logging out, you will continue to be logged in to your account.

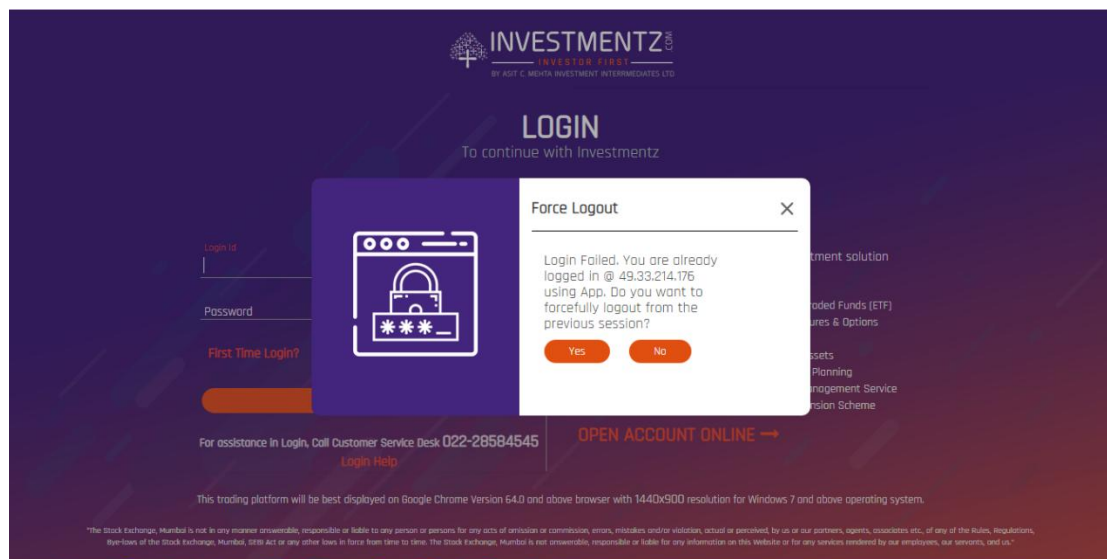
In such a case, when you try to login again with your credentials, you will be asked to force logout and the process for the same is as follows.

Step 1: Enter the login credentials created by you during the First Time Login process:



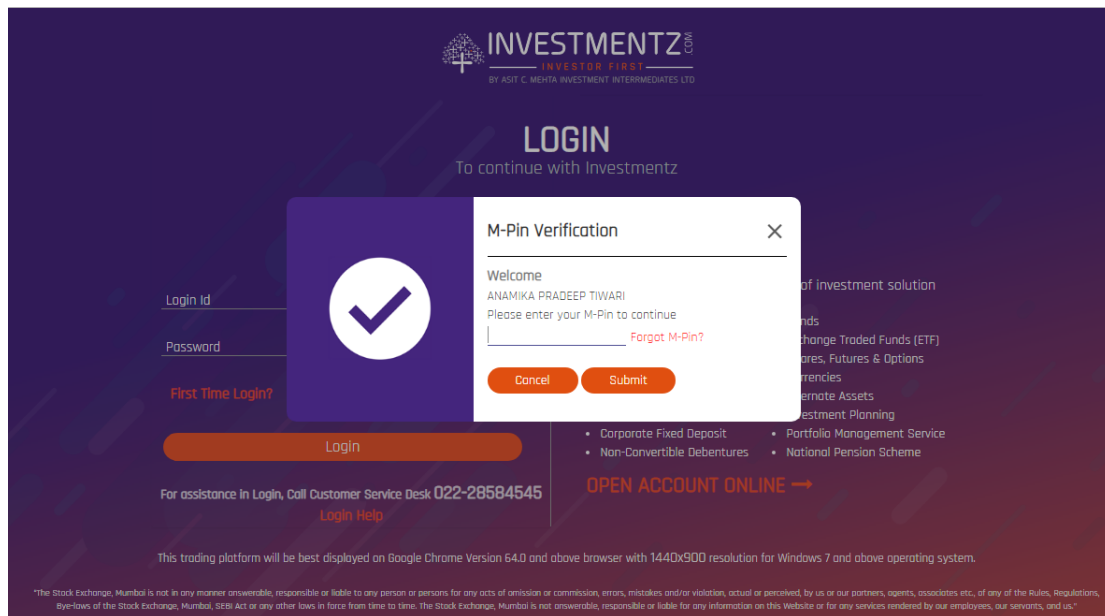
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Step 2: Logout from the previous sessions by clicking on Yes in the pop-up which appears below



The image shows the Investmentz login page with a 'Force Logout' pop-up window. The pop-up window has a title bar with a close button (X) and a message: 'Login Failed. You are already logged in @ 49.33.214.176 using App. Do you want to forcefully logout from the previous session?'. There are two buttons: 'Yes' and 'No'. The background of the login page is visible, showing the same login form and navigation links as in the previous image.

Step 3: You will be then asked to enter your 4 digit M-Pin



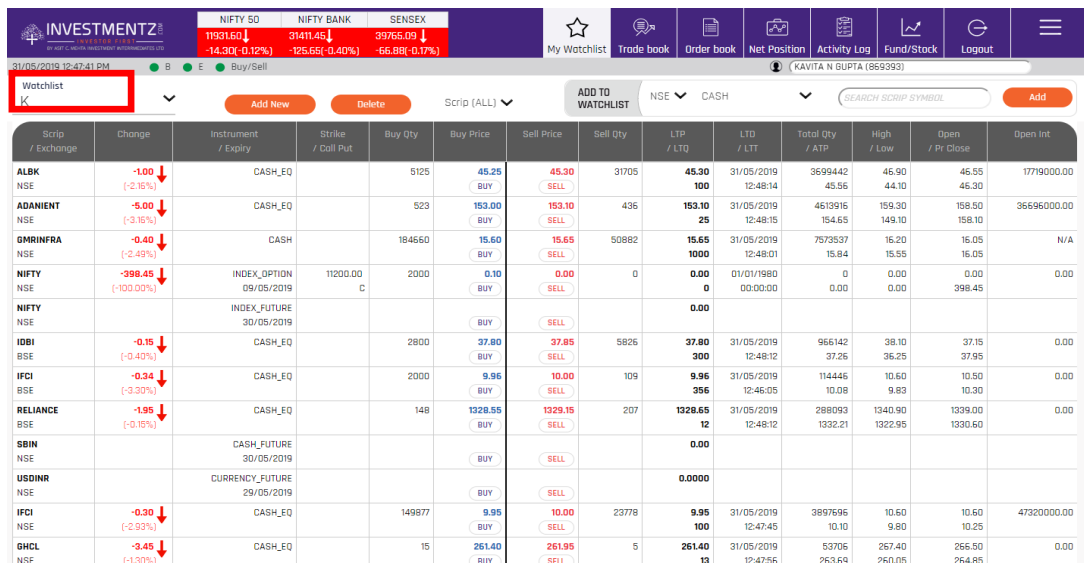
Enter your M-Pin and click on Submit. You will be able to successfully login back into your account and begin trading.

3. Market Watch

As you must all be aware, a marketwatch is the screen where you can watch the price of stocks/F&O/currencies live. In this blog we will discuss how to setup the marketwatch on Investmentz Trading Platform and also how to add various scrips to the marketwatch.

3.1.How to create a Market Watch?

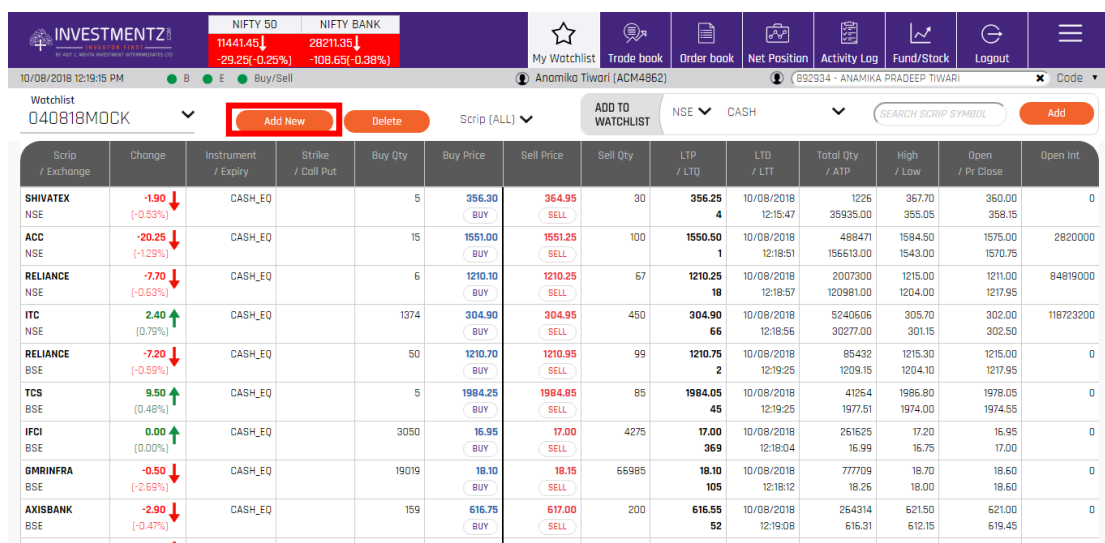
Select Watch list tab from header.



The screenshot shows the InvestmentZ application interface. At the top, there are market indices: NIFTY 50 (11931.60, -14.30, -0.12%), NIFTY BANK (3141.45, -125.65, -0.40%), and SENSEX (39765.09, -66.89, -0.17%). Below this is a navigation bar with tabs: My Watchlist, Trade book, Order book, Net Position, Activity Log, Fund/Stock, and Logout. The 'My Watchlist' tab is selected. Below the navigation bar, there is a 'Watchlist' section with a search bar and an 'Add New' button highlighted with a red box. The main table displays a list of stocks with columns: Scrip / Exchange, Change, Instrument / Expiry, Strike / Call Put, Buy Qty, Buy Price, Sell Price, Sell Qty, LTP / LTO, LTD / LTT, Total Qty / ATP, High / Low, Open / Pr Close, and Open Int. The table lists various stocks including ALBK, ADANIEN, GMRINFRA, NIFTY, NIFTY, IDBI, IFCI, RELIANCE, SBIN, USOINR, IFCI, and GHCL.

Scrip / Exchange	Change	Instrument / Expiry	Strike / Call Put	Buy Qty	Buy Price	Sell Price	Sell Qty	LTP / LTO	LTD / LTT	Total Qty / ATP	High / Low	Open / Pr Close	Open Int
ALBK NSE	-1.00 (-2.16%)	CASH_EQ		5125	45.25 (BUY)	45.30 (SELL)	31705	45.30 100	31/05/2019 12:48:14	3699442 45.56	45.90 44.10	45.55 46.30	17719000.00
ADANIEN NSE	-5.00 (-3.16%)	CASH_EQ		523	153.00 (BUY)	153.10 (SELL)	436	153.10 25	31/05/2019 12:48:15	4513915 154.65	159.30 149.10	158.50 158.10	36696000.00
GMRINFRA NSE	-0.40 (-2.49%)	CASH		184660	15.60 (BUY)	15.65 (SELL)	50982	15.65 1000	31/05/2019 12:48:01	7573537 15.84	16.20 15.55	16.05 16.05	N/A
NIFTY NSE	-398.45 (-100.00%)	INDEX_OPTION 09/05/2019	11200.00 C	2000	0.10 (BUY)	0.00 (SELL)	0	0.00 0	01/01/1980 00:00:00	0 0.00	0.00 0.00	0.00 398.45	0.00
NIFTY NSE		INDEX_FUTURE 30/05/2019			(BUY)	(SELL)		0.00					
IDBI BSE	-0.15 (-0.40%)	CASH_EQ		2800	37.80 (BUY)	37.85 (SELL)	5826	37.80 300	31/05/2019 12:48:12	966142 37.26	38.10 36.25	37.15 37.95	0.00
IFCI BSE	-0.34 (-3.30%)	CASH_EQ		2000	9.95 (BUY)	10.00 (SELL)	109	9.95 356	31/05/2019 12:46:05	114446 10.08	10.60 9.83	10.50 10.30	0.00
RELIANCE BSE	-1.95 (-0.15%)	CASH_EQ		148	1328.55 (BUY)	1329.15 (SELL)	207	1328.65 12	31/05/2019 12:48:12	288093 1332.21	1340.90 1322.95	1339.00 1330.60	0.00
SBIN NSE		CASH_FUTURE 30/05/2019			(BUY)	(SELL)		0.00					
USOINR NSE		CURRENCY_FUTURE 29/05/2019			(BUY)	(SELL)		0.0000					
IFCI NSE	-0.30 (-2.93%)	CASH_EQ		149977	9.95 (BUY)	10.00 (SELL)	23778	9.95 100	31/05/2019 12:47:45	3897696 10.10	10.60 9.80	10.60 10.25	47320000.00
GHCL NSE	-3.45 (-1.30%)	CASH_EQ		15	261.40 (BUY)	261.95 (SELL)	5	261.40 13	31/05/2019 12:47:56	53706 263.69	267.40 260.05	266.50 264.85	0.00

Step 1: If you want to create the new watchlist then click on “add new” and a popup will appear

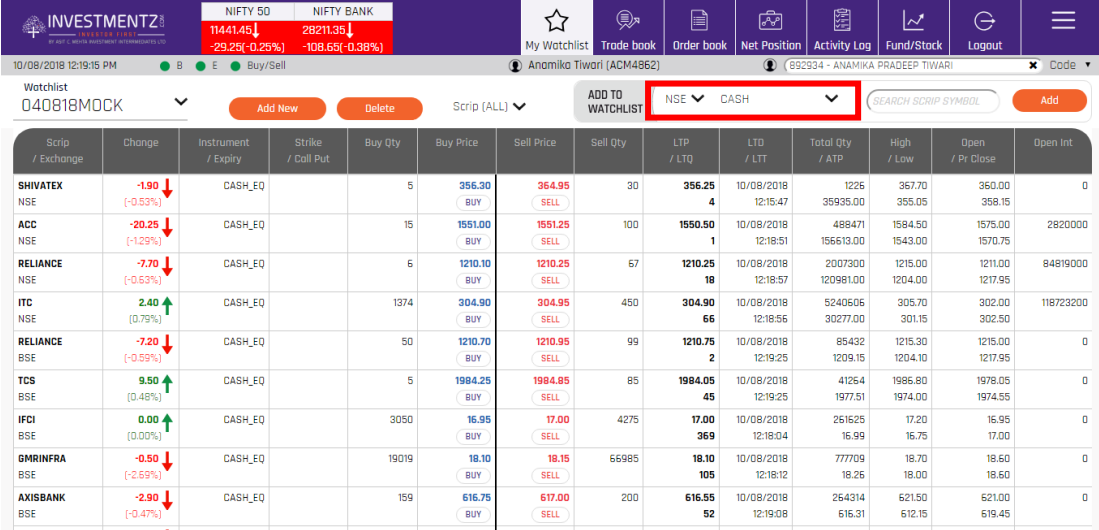


The screenshot shows the InvestmentZ application interface. At the top, there are market indices: NIFTY 50 (11441.45, -29.25, -0.25%) and NIFTY BANK (28211.35, -108.65, -0.38%). Below this is a navigation bar with tabs: My Watchlist, Trade book, Order book, Net Position, Activity Log, Fund/Stock, and Logout. The 'My Watchlist' tab is selected. Below the navigation bar, there is a 'Watchlist' section with a search bar and an 'Add New' button highlighted with a red box. The main table displays a list of stocks with columns: Scrip / Exchange, Change, Instrument / Expiry, Strike / Call Put, Buy Qty, Buy Price, Sell Price, Sell Qty, LTP / LTO, LTD / LTT, Total Qty / ATP, High / Low, Open / Pr Close, and Open Int. The table lists various stocks including SHIVATEX, ACC, RELIANCE, ITC, RELIANCE, TCS, IFCI, GMRINFRA, and AXISBANK.

Scrip / Exchange	Change	Instrument / Expiry	Strike / Call Put	Buy Qty	Buy Price	Sell Price	Sell Qty	LTP / LTO	LTD / LTT	Total Qty / ATP	High / Low	Open / Pr Close	Open Int
SHIVATEX NSE	-1.90 (-0.53%)	CASH_EQ		5	356.30 (BUY)	364.95 (SELL)	30	356.25 4	10/08/2018 12:15:47	1226 35935.00	367.70 355.05	360.00 358.15	0
ACC NSE	-20.25 (-1.29%)	CASH_EQ		15	1551.00 (BUY)	1551.25 (SELL)	100	1550.50 1	10/08/2018 12:18:51	488471 156513.00	1584.50 1543.00	1575.00 1570.75	2820000
RELIANCE NSE	-7.70 (-0.63%)	CASH_EQ		6	1210.10 (BUY)	1210.25 (SELL)	67	1210.25 18	10/08/2018 12:18:57	2007300 120981.00	1215.00 1204.00	1211.00 1217.95	84819000
ITC NSE	2.40 (0.79%)	CASH_EQ		1374	304.90 (BUY)	304.95 (SELL)	450	304.90 66	10/08/2018 12:18:56	5240606 30277.00	305.70 301.15	302.00 302.50	118723200
RELIANCE BSE	-7.20 (-0.59%)	CASH_EQ		50	1210.70 (BUY)	1210.95 (SELL)	99	1210.75 2	10/08/2018 12:19:25	85432 1209.15	1215.30 1204.10	1215.00 1217.95	0
TCS BSE	9.50 (0.48%)	CASH_EQ		5	1984.25 (BUY)	1984.85 (SELL)	85	1984.05 45	10/08/2018 12:19:25	41264 1977.51	1986.80 1974.00	1978.05 1974.55	0
IFCI BSE	0.00 (0.00%)	CASH_EQ		3050	16.95 (BUY)	17.00 (SELL)	4275	17.00 369	10/08/2018 12:18:04	261625 16.99	17.20 16.75	16.95 17.00	0
GMRINFRA BSE	-0.50 (-2.69%)	CASH_EQ		19019	18.10 (BUY)	18.15 (SELL)	65985	18.10 105	10/08/2018 12:18:12	777709 18.26	18.70 18.00	18.60 18.60	0
AXISBANK BSE	-2.90 (-0.47%)	CASH_EQ		159	616.75 (BUY)	617.00 (SELL)	200	616.55 52	10/08/2018 12:19:08	254314 616.31	621.50 612.15	621.00 619.45	0

then you must enter the Name of the Market Watch that you want to create like “My Best”. You have an option of setting this watchlist as your default watchlist. In order to set it as default, click Yes or else click No and click on save button.

Step 2: To add scrips in your watchlist, select the watchlist and then select the exchange and segment.



The screenshot shows the INVESTMENTZ website interface. At the top, there are market indices: NIFTY 50 (11441.45, -0.25%) and NIFTY BANK (28211.35, -0.38%). Below this, the user's profile 'Anamika Tiwari (ACM4862)' is visible. The main section is titled 'Watchlist' and shows a table of stocks. The 'ADD TO WATCHLIST' dropdown is highlighted, showing 'NSE' and 'CASH' options. The table lists the following stocks:

Scrip / Exchange	Change	Instrument / Expiry	Strike / Call Put	Buy Qty	Buy Price	Sell Price	Sell Qty	LTP / LTQ	LTD / LTT	Total Qty / ATP	High / Low	Open / Pr Close	Open Int
SHIVATEX NSE	-1.90 (-0.53%)	CASH_EQ		5	355.30	364.95	30	355.25	10/08/2018 12:15:47	1226 35935.00	367.70 355.05	360.00 358.15	0
ACC NSE	-20.25 (-1.29%)	CASH_EQ		15	1551.00	1551.25	100	1550.50	10/08/2018 12:18:51	488471 156613.00	1584.50 1543.00	1575.00 1570.75	2820000
RELIANCE NSE	-7.70 (-0.53%)	CASH_EQ		6	1210.10	1210.25	67	1210.25	10/08/2018 12:18:57	2007300 120981.00	1215.00 1204.00	1211.00 1217.95	84819000
ITC NSE	2.40 (0.79%)	CASH_EQ		1374	304.90	304.95	450	304.90	10/08/2018 12:18:56	5240505 30277.00	305.70 301.15	302.00 302.50	118723200
RELIANCE BSE	-7.20 (-0.59%)	CASH_EQ		50	1210.70	1210.95	99	1210.75	10/08/2018 12:19:25	85432 1209.15	1215.30 1204.10	1215.00 1217.95	0
TCS BSE	9.50 (0.48%)	CASH_EQ		5	1984.25	1984.85	85	1984.05	10/08/2018 12:19:25	41264 1977.51	1985.80 1974.00	1978.05 1974.55	0
IFCI BSE	0.00 (0.00%)	CASH_EQ		3050	16.95	17.00	4275	17.00	10/08/2018 12:18:04	251525 15.99	17.20 15.75	16.95 17.00	0
GMRINFRA BSE	-0.50 (-2.59%)	CASH_EQ		19019	18.10	18.15	55985	18.10	10/08/2018 12:18:12	777709 18.26	18.70 18.00	18.60 18.60	0
AXISBANK BSE	-2.90 (-0.47%)	CASH_EQ		159	616.75	617.00	200	616.55	10/08/2018 12:19:08	254314 616.31	621.50 612.15	621.00 619.45	0

Step 3: Search the scrip code, select the scrip you want to add in your watchlist and then click on “Add” button. The scrip has been successfully added to your watchlist

Scrip / Exchange	Change	Instrument / Expiry	Strike / Call Put	Buy Qty	Buy Price	Sell Price	Sell Qty	LTP / LTQ	LTD / LTT	Total Qty / ATP	High / Low	Open / Pr. Close	Open Int
SHIVATEX NSE	-1.90 (-0.63%)	CASH_EQ		5	356.30 BUY	364.95 SELL	30	356.25 4	10/08/2018 12:15:47	1226 35935.00	367.70 355.05	360.00 358.15	0
ACC NSE	-20.25 (-1.29%)	CASH_EQ		15	1551.00 BUY	1551.25 SELL	100	1550.50 1	10/08/2018 12:18:51	488471 155613.00	1584.50 1543.00	1575.00 1570.75	2820000
RELIANCE NSE	-7.70 (-0.63%)	CASH_EQ		6	1210.10 BUY	1210.25 SELL	67	1210.25 18	10/08/2018 12:18:57	2007300 120981.00	1215.00 1204.00	1211.00 1217.95	84819000
ITC NSE	2.40 (0.79%)	CASH_EQ		1374	304.90 BUY	304.95 SELL	450	304.90 66	10/08/2018 12:18:56	5240606 30277.00	305.70 301.15	302.00 302.50	118723200
RELIANCE BSE	-7.20 (-0.55%)	CASH_EQ		50	1210.70 BUY	1210.95 SELL	99	1210.75 2	10/08/2018 12:19:25	85432 1209.15	1215.30 1204.10	1215.00 1217.95	0
TCS BSE	9.50 (0.48%)	CASH_EQ		5	1984.25 BUY	1984.85 SELL	85	1984.05 45	10/08/2018 12:19:25	41264 1977.51	1986.80 1974.00	1978.05 1974.55	0
IFCI BSE	0.00 (0.00%)	CASH_EQ		3050	16.95 BUY	17.00 SELL	4275	17.00 369	10/08/2018 12:18:04	261625 16.99	17.20 16.75	16.95 17.00	0
GMRINFRA BSE	-0.50 (-2.59%)	CASH_EQ		19019	18.10 BUY	18.15 SELL	65985	18.10 105	10/08/2018 12:18:12	777709 18.26	18.70 18.00	18.60 18.60	0
AXISBANK BSE	-2.90 (-0.47%)	CASH_EQ		159	616.75 BUY	617.00 SELL	200	616.55 52	10/08/2018 12:19:08	254314 615.31	621.50 612.15	621.00 619.45	0

To see the marketwatch, you have to click on my watchlist and then select watchlist name. Then you can see live data of scrips of the selected watchlist .

On clicking the scrip detail in the chart you will get seven options which are details, buy, sell, chart, depth, sq off and delete. You can directly buy/sell from the watchlist on clicking buy/sell button.

INVESTMENTZ		NIFTY 50	NIFTY BANK	<div> <div>My Watchlist</div> <div>Trade book</div> <div>Order book</div> <div>Net Position</div> <div>Activity Log</div> <div>Fund/Stock</div> <div>Logout</div> </div>									
10/08/2018 12:19:53 PM		<div> <div>11441.85</div> <div>28211.85</div> <div>-28.85(-0.25%)</div> <div>-108.15(-0.38%)</div> </div>		<div> <div>Anomika Tiwari (ACM4862)</div> <div>692934 - ANAMIKA PRADEEP TIWARI</div> <div>Code</div> </div>									
Watchlist		040818MOCK		<div> <div>Add New</div> <div>Delete</div> <div>Scrip (ALL)</div> <div>ADD TO WATCHLIST</div> <div>NSE</div> <div>CASH</div> <div>SEARCH SCRIP SYMBOL</div> <div>Add</div> </div>									
Scrip / Exchange	Change	Instrument / Expiry	Strike / Call Put	Buy Qty	Buy Price	Sell Price	Sell Qty	LTP / LTQ	LTD / LTT	Total Qty / ATP	High / Low	Open / Pr Close	Open Int
SHIVATEX NSE	-1.90 (-0.53%)	CASH_EQ		5	356.30	364.95	30	356.25	10/08/2018 12:15:47	1225 35935.00	367.70 355.05	360.00 358.15	0
ACC NSE	-19.35 (-1.23%)	CASH_EQ		17	1551.00	1551.40	7	1551.40	10/08/2018 12:19:37	488514 155613.00	1584.50 1543.00	1575.00 1570.75	2820000
RELIANCE NSE	-7.95 (-0.65%)	CASH_EQ		33	1210.10	1210.50	100	1210.00	10/08/2018 12:19:28	2009517 120981.00	1215.00 1204.00	1211.00 1217.95	84819000
<div> <div>RELIANCE</div> <div>BUY</div> <div>SELL</div> <div>Chart</div> <div>Depth</div> <div>Sq Off</div> <div>Delete</div> <div>Details</div> </div>													
ITC NSE	2.40 (0.75%)	CASH_EQ		4835	304.85	304.90	49	304.90	10/08/2018 12:19:25	5251260 30278.00	305.70 301.15	302.00 302.50	118723200
RELIANCE BSE	-7.00 (-0.57%)	CASH_EQ		50	1210.70	1210.95	91	1210.95	10/08/2018 12:20:01	85503 1209.31	1215.30 1204.10	1215.00 1217.95	0
TCS BSE	10.45 (0.53%)	CASH_EQ		96	1984.05	1985.45	44	1985.00	10/08/2018 12:20:03	41374 1977.09	1986.80 1974.00	1978.05 1974.55	0
IFCI BSE	0.00 (0.00%)	CASH_EQ		3050	16.95	17.00	4275	17.00	10/08/2018 12:19:39	261625 16.99	17.20 16.75	16.95 17.00	0
GMRINFRA BSE	-0.45 (-2.42%)	CASH_EQ		21291	18.10	18.15	66885	18.15	10/08/2018 12:20:02	782534 18.27	18.70 18.00	18.60 18.60	0

3.2. Quick Buy/Sell and Search

Step 1 : In case you want to search the details of a scrip , you can do so by clicking the Buy/Sell Option under the My Watchlist tab as shown below :

Click here to buy/sell

INVESTMENTZ		NIFTY 50	NIFTY BANK	<div> <div>My Watchlist</div> <div>Trade book</div> <div>Order book</div> <div>Net Position</div> <div>Activity Log</div> <div>Fund/Stock</div> <div>Logout</div> </div>									
10/08/2018 12:19:15 PM		<div> <div>11441.45</div> <div>28211.35</div> <div>-29.25(-0.26%)</div> <div>-108.65(-0.38%)</div> </div>		<div> <div>Anomika Tiwari (ACM4862)</div> <div>692934 - ANAMIKA PRADEEP TIWARI</div> <div>Code</div> </div>									
Watchlist		040818MOCK		<div> <div>Add New</div> <div>Delete</div> <div>Scrip (ALL)</div> <div>ADD TO WATCHLIST</div> <div>NSE</div> <div>CASH</div> <div>SEARCH SCRIP SYMBOL</div> <div>Add</div> </div>									
Scrip / Exchange	Change	Instrument / Expiry	Strike / Call Put	Buy Qty	Buy Price	Sell Price	Sell Qty	LTP / LTQ	LTD / LTT	Total Qty / ATP	High / Low	Open / Pr Close	Open Int
SHIVATEX NSE	-1.90 (-0.53%)	CASH_EQ		5	356.30	364.95	30	356.25	10/08/2018 12:15:47	1225 35935.00	367.70 355.05	360.00 358.15	0
ACC NSE	-20.25 (-1.29%)	CASH_EQ		15	1551.00	1551.25	100	1550.50	10/08/2018 12:18:51	488471 155613.00	1584.50 1543.00	1575.00 1570.75	2820000
RELIANCE NSE	-7.70 (-0.63%)	CASH_EQ		6	1210.10	1210.25	67	1210.25	10/08/2018 12:18:57	2007300 120981.00	1215.00 1204.00	1211.00 1217.95	84819000
ITC NSE	2.40 (0.75%)	CASH_EQ		1374	304.90	304.95	450	304.90	10/08/2018 12:18:56	5240505 30277.00	305.70 301.15	302.00 302.50	118723200
RELIANCE BSE	-7.20 (-0.59%)	CASH_EQ		50	1210.70	1210.95	99	1210.75	10/08/2018 12:19:25	85432 1209.15	1215.30 1204.10	1215.00 1217.95	0
TCS BSE	9.50 (0.48%)	CASH_EQ		5	1984.25	1984.85	85	1984.05	10/08/2018 12:19:25	41254 1977.51	1986.80 1974.00	1978.05 1974.55	0
IFCI BSE	0.00 (0.00%)	CASH_EQ		3050	16.95	17.00	4275	17.00	10/08/2018 12:18:04	261625 16.99	17.20 16.75	16.95 17.00	0
GMRINFRA BSE	-0.50 (-2.59%)	CASH_EQ		19019	18.10	18.15	65985	18.10	10/08/2018 12:18:12	777709 18.25	18.70 18.00	18.60 18.60	0
AXISBANK BSE	-2.90 (-0.47%)	CASH_EQ		159	616.75	617.00	200	616.55	10/08/2018 12:19:08	264314 615.31	621.50 612.15	621.00 619.45	0

Step 2: The below mentioned screen will open up, which allows you to buy/sell and search the scrip of your choice.

The screenshot displays the Investmentz trading platform interface. On the left, a watchlist shows various stocks with their current prices and changes. The main section displays the TCS stock page, including its bid and ask prices, volume, and a summary of its performance. On the right, the Buy/Sell order window is open, showing the user's account details, the selected stock (TCS), and the order type (LIMIT). The order price is set to ₹1985.80, and the quantity is 1. The window also includes a 'TRADE' button and a 'TODAY'S POSITION' section.

4.Orders

4.1.Buy & Sell Window

The order window on our Investmentz Trading Platforms looks as mentioned below.

The screenshot displays the Investmentz trading platform interface for the ONGC stock. The main section shows the ONGC stock page with its bid and ask prices, volume, and a summary of its performance. On the right, the Buy/Sell order window is open, showing the user's account details, the selected stock (ONGC), and the order type (LIMIT). The order price is set to ₹172.50, and the quantity is 1. The window also includes a 'TRADE' button and a 'TODAY'S POSITION' section.

In the snapshot above you will see various fields, which are described in detail as follows:

Exchange Segment: This will indicate which segment you are placing the orders. The various segments are NSE (NSE Equity), NFO (NSE Futures & Options), BSE (BSE Equity), BFO (BSE Futures & Options) and CDS (NSE Currency Derivative Segment).

Order Type: Order can be a Limit order (where you specify the buy/sell price), Market order (where you buy/sell at market price), SL/SL-M (stop loss/stop loss market). The difference between SL and SL-M is that when the trigger price is hit, the stop loss order is sent as a limit order with the limit price mentioned by you in the SL order, whereas in SL-M, the order is sent to the exchange as a Market order.

Instrument Name, Symbol, Type, Strike, Expiry: All of these are chosen by default when you click on a contract and ask to buy/sell. But if you want to change the contract/scrip, you can do it from here.

Quantity: Buy/Sell order Quantity. By default, it will show 1 for equity orders and 1 lot for F&O. To change the default quantity and any other attributes of the order.

Order Price: Mention the price if your order is limit order; if it is a market order this field cannot be entered.

Trigger Price: Trigger price will be used for Stop Loss orders. The price at which you want the stop loss to be triggered.

Disclosed Quantity: This feature can be used only on Equities (Stocks only). If you are placing a big limit order and you don't want the entire quantity to be disclosed fearing a non-execution of order you can choose Disclosed Quantity. For example, if you buy 1000 shares of Infosys at Rs 1100 and you mention the disclosed quantity as 500, your order will show only 500 in the market depth window for everyone else, whereas actually, it is 1000. This is useful only if you are trading bigger quantities.

Validity: While trading on NSE/BSE you get only 2 options, Day orders (valid till end of the day) or IOC – Immediate or Cancel (as the name suggests, the order if not executed immediately will get cancelled). By default, day option will be selected. IOC will be a good option for people who place market orders of large quantity thereby increasing the Impact cost.

Client ID, Name, Participant, No of Days: These will be selected by default and no change to be made on this. Validity date can be used only for GTD orders on MCX.

4.2.Order Book

The Order Book is a very important tool on our Investmentz Trading Platform. It helps you monitor/cancel/modify your orders. To access the Order Book, click on Order Book on the Header Panel of the Platform as shown below:

Step 2: On Clicking the Modify button, the order window appears and you are allowed to modify the order by making the desired modification in any of the fields and after that is done, click on Modify button.

The screenshot displays the INVESTMENTZ trading platform. The main window shows the GMRINFRA stock page with a price of 18.05 and a change of -0.55 (-2.96%). The left sidebar lists client orders for Anamika Tiwari. The right sidebar shows the 'MODIFY / CANCEL ORDER' window for a sell order.

MODIFY / CANCEL ORDER

BUY SELL

☒ CNC/NORMAL ☐ MIS ☒ DAY ☐ IOC

ORDER TYPE: LIMIT

QUANTITY: X 3 (Min Lot Size :) Available Shares)

ORDER PRICE: 20.30

TRIGGER PRICE:

DISCLOSED QTY: 0

EST. TOTAL ₹60.90

CANCEL ORDER UPDATE ORDER

TODAY'S POSITION

QTY	VALUE	QTY	VALUE
0.00	0.00	0.00	0.00
MTM POSITION	0.00	GAIN/LOSS	0
CNC/MIS	CNC/NORMAL		

Step 3: Once modification is complete, a pop-up appears which confirms successful modification of the order.

4.4.Cancel Orders

Step 1: Select the order to wish to cancel from the list of orders. A pop-up appears which asks you to select your choice – either modify or cancel. Click on Cancel.

The screenshot shows the INVESTMENTZ8 web interface. At the top, there are tabs for NIFTY 50 and NIFTY BANK. Below the tabs, there are navigation links: My Watchlist, Trade book, Order book, Net Position, Activity Log, Fund/Stock, and Logout. The main content area displays a table of orders. The first order is highlighted, and a 'Cancel Order' button is visible next to it.

Client Id Emp. Name	Scrip Exchange	Instrument Expiry	Strike Call/Put	LTP	Change	Order Type	Order qty Exc. Order no	Order price Order time	Qty pending	Int order no CNC/MIS	Dis qty Pending	Status
892934 Anamika Tiwari	GMRINFRA NSE	CASH		18.1	-0.50 (-2.69%)	SELL Limit Order	3 1100000002058756	20.30 10:30 am	3	45956 CNC/NORMAL	0 0	MODIFIED
892934												
892934 Anamika Tiwari	GMRINFRA NSE	CASH		18.1	-0.50 (-2.69%)	SELL Limit Order	1 1100000002058756	20.45 10:38 am	1	45976 CNC/NORMAL	4 0	REJECTED
892934 Anamika Tiwari	IFCI NSE	CASH		16.9	-0.15 (-0.88%)	SELL Limit Order	2 1100000002058756	17.95 10:38 am	2	45975 CNC/NORMAL	1 0	REJECTED
892934 Anamika Tiwari	IFCI NSE	CASH		16.9	-0.15 (-0.88%)	SELL Limit Order	2 1100000002058756	17.95 10:37 am	2	45971 CNC/NORMAL	1 0	REJECTED
892934 Anamika Tiwari	IFCI NSE	CASH		16.9	-0.15 (-0.88%)	SELL Limit Order	2 1100000002058756	17.95 10:36 am	2	45969 CNC/NORMAL	1 0	REJECTED

Step 2: On Clicking the Cancel button, the order window appears and you can cancel your order by clicking on Cancel.

The screenshot shows the INVESTMENTZ8 web interface with the 'MODIFY / CANCEL ORDER' window open for GMRINFRA. The window displays the order details, including the order type, quantity, order price, and trigger price. The 'CANCEL ORDER' button is highlighted.

GMR INFRASTRUCTURE LTD.		GMRINFRA	
BID QTY	BID PRICE	ASK PRICE	ASK QTY
344229	18.05	18.10	142052
659274	18.00	18.15	432542
195901	17.95	18.20	330143
204858	17.90	18.25	183755
59492	17.85	18.30	207036
TOTAL QTY	1463754	TOTAL QTY	1295528
OI	N/A	OI CHANGE	N/A
AVG PRICE	1822.00	30 MIN AVG PRICE	WIP
STATS			
OPEN	18.50	CLOSE (LTP)	18.05
HIGH	18.75	PREV CLOSE	18.60
LOW	17.95	CHANGE	-2.96%
52 WK HIGH	25.05	52 WK LOW	14.55
LOW CKT LIM	16.75	UPP CKT LIM	20.45

MODIFY / CANCEL ORDER	
<input type="radio"/> BUY	<input checked="" type="radio"/> SELL
<input checked="" type="radio"/> CNC/NORMAL	<input type="radio"/> MIS
<input type="radio"/> DAY	<input type="radio"/> IDC
ORDER TYPE	LIMIT
QUANTITY	3
ORDER PRICE	20.30
TRIGGER PRICE	
DISCLOSED QTY	0
EST. TOTAL	₹60.90
<input type="button" value="CANCEL ORDER"/>	<input type="button" value="UPDATE ORDER"/>
TODAY'S POSITION	
QTY	0.00
VALUE	0.00
MTM POSITION	0.00
GAIN/LOSS	0
CNC/MIS	CNC/NORMAL

Step 3: Once cancellation is complete, a pop-up appears which confirms successful cancellation of the order.

Some of the main reasons for your orders to be rejected are:

Invalid Product Type (using CNC for F&O, so on and so forth)

Insufficient funds (please note that when you place an order – even if it is not executed, the exchange blocks funds as long as it is open), so be sure to check for any Open orders in Order Book. The rejection reason is self-explanatory, but feel free to contact us in case you cannot figure out the reason for rejection.

4.5. Stop Loss Orders – Limit/Market

What is a Stop Loss order?

When you are holding a particular stock/F&O, you fear the losses that can happen when the price starts moving against you. If you place an order to limit such a loss it is called as a Stop Loss order. So for example, if you have bought a stock at Rs 100 and you want to limit the loss at 95, you can place an order in the system to sell the stock as soon as the stock comes to 95. Such an order is called as a Stop Loss, as you are placing it to stop a loss, which could be more than what you are ready to risk.

How to place SL/SL-Market order?

The difference between a stop loss (SL) and a normal order is the trigger price. In a normal order, you get to choose either limit order or market orders. In a stop loss order you choose limit or market, but with a trigger price. What a trigger price does is that it activates your order which otherwise is inactive.

1. You will have a selling stop loss if you have bought an instrument (stock, F&O, etc).

In the above example, when you bought the stock at Rs 100, you will also place a sell stop loss order with a trigger price of 95. What this does is when the price of the stock goes to 95 or lower, a selling order is triggered. You can choose if you want this selling order as a limit order or market order. If you choose a SL order with a selling order as market price it is called SL-M, otherwise if you have to mention the limit price it is called a normal SL order.

In this example, if you choose SL-M and keep the trigger as 95, as soon as stock goes to 95 or lower a selling order is triggered at the exchange at market price. If you choose SL, as soon as stock goes to 95 or lower, a selling order is triggered at the exchange with the limit price mentioned by you. Please do understand that if the Stop loss order is sent as a limit price, there is no guaranteed execution of the stop loss as the limit order can also become a pending order

5.Trade book

In trade book user can view entire list of all traded orders. User can view exchange and scrips wise trade details in trade book window.

INVESTMENTZ				NIFTY 50		NIFTY BANK		My Watchlist		Trade book		Order book		Net Position		Activity Log		Fund/Stock		Logout			
				11438.95↓ -31.75(-0.28%)		26207.80↓ -112.20(-0.40%)																	
10/08/2018 12:21:53 PM				B		E		Anamika Tiwari [ACM4862]		▼		892934 - ANAMIKA PRADEEP TIWARI		X		Code							
FILTER				Market Segment ▼		Scrip (ALL) ▼																PDF EXCEL	
Client Id	Scrip	Instrument	Strike	Order	Order qty	Order price	Trade qty	Trade price	CNC/MIS	Int ord no	Status	Qty	Dis qty										
Emp. Name	Exchange	Expiry	Call/Put	Type	Exc. Order no	Order time	Trade no	Trade time		Time		pending	Pending										
892934	GMRINFRA	EQ	0	BUY	1	17.95	1	17.95	CNC/NORMAL	45852	Complete	0	0										
Anamika Tiwari	NSE			RL	1100000001449046	09:54:29 AM	26408004	11:56:26 AM		09:54:29 AM													
892934														Conversion (MIS/CNC)									
892934	GMRINFRA	EQ	0	SELL	1	0	1	18.05	CNC/NORMAL	1909	Complete	0	0										
Anamika Tiwari	BSE			RLMKT	1533871800030122386	11:43:31 AM	8184	11:43:31 AM		11:43:31 AM													
892934	GMRINFRA	EQ	0	BUY	3	18.2	3	18.2	CNC/NORMAL	45974	Complete	0	0										
Anamika Tiwari	NSE			RL	1100000002179684	10:37:54 AM	25928222	10:37:54 AM		10:37:54 AM													
892934	GMRINFRA	EQ	0	BUY	1	18.2	1	18.2	CNC/NORMAL	45970	Complete	0	0										
Anamika Tiwari	NSE			RL	1100000002170967	10:37:14 AM	25924718	10:37:14 AM		10:37:14 AM													
892934	GMRINFRA	EQ	0	BUY	4	20.1	4	20.1	CNC/NORMAL	45952	Complete	0	0										
Anamika Tiwari	NSE			RL	1100000002052004	10:28:44 AM	25870865	10:28:44 AM		10:28:44 AM													
892934	GMRINFRA	EQ	0	SELL	2	18.05	2	18.1	CNC/NORMAL	45942	Complete	0	0										
Anamika Tiwari	NSE			RL	1100000001895505	10:17:44 AM	25796165	10:17:44 AM		10:17:44 AM													
892934	GMRINFRA	EQ	0	BUY	2	18.1	2	18.1	CNC/NORMAL	45941	Complete	0	0										
Anamika Tiwari	NSE			RL	1100000001895505	10:17:44 AM	25796165	10:17:44 AM		10:17:44 AM													

5.1.MIS/CNC Conversion

User can convert MIS order in to CNC order and CNC order in to MIS on clicking particular scrip from Trade Book.

INVESTMENTZ													
		NIFTY 50		NIFTY BANK		My Watchlist		Trade book		Order book		Net Position	
		11438.95		28207.80									
		-31.75(-0.28%)		-112.20(-0.40%)									
10/08/2018 12:21:53 PM													
Anamika Tiwari (ACM4862)													
(892934 - ANAMIKA PRADEEP TIWARI)													
Code													
PDF EXCEL													
Market Segment Scrip (ALL)													
Client Id	Scrip	Instrument	Strike	Order	Order qty	Order price	Trade qty	Trade price	CNC/MIS	Int ord no	Status	Qty pending	Dis qty
Emp. Name	Exchange	Expiry	Call/Put	Type	Exc. Order no	Order time	Trade no	Trade time		Time			
892934	GMRINFRA	EQ	0	BUY	1	17.95	1	17.95	CNC/NORMAL	45852	Complete	0	0
Anamika Tiwari	NSE			RL	1100000001449046	09:54:29 AM	26408004	11:56:26 AM		09:54:29 AM		0	0
892934													
Conversion (MIS/CNC)													
892934	GMRINFRA	EQ	0	SELL	1	0	1	18.05	CNC/NORMAL	1909	Complete	0	0
Anamika Tiwari	BSE			RLMKT	1533871800030122386	11:43:31 AM	8184	11:43:31 AM		11:43:31 AM		0	0
892934	GMRINFRA	EQ	0	BUY	3	18.2	3	18.2	CNC/NORMAL	45974	Complete	0	0
Anamika Tiwari	NSE			RL	1100000002179684	10:37:54 AM	25928222	10:37:54 AM		10:37:54 AM		0	0
892934	GMRINFRA	EQ	0	BUY	1	18.2	1	18.2	CNC/NORMAL	45970	Complete	0	0
Anamika Tiwari	NSE			RL	1100000002170967	10:37:14 AM	25924718	10:37:14 AM		10:37:14 AM		0	0
892934	GMRINFRA	EQ	0	BUY	4	20.1	4	20.1	CNC/NORMAL	45952	Complete	0	0
Anamika Tiwari	NSE			RL	1100000002052004	10:28:44 AM	25870865	10:28:44 AM		10:28:44 AM		0	0
892934	GMRINFRA	EQ	0	SELL	2	18.05	2	18.1	CNC/NORMAL	45942	Complete	0	0
Anamika Tiwari	NSE			RL	1100000001895505	10:17:44 AM	25796165	10:17:44 AM		10:17:44 AM		0	0
892934	GMRINFRA	EQ	0	BUY	2	18.1	2	18.1	CNC/NORMAL	45941	Complete	0	0

On clicking MIS/CNC conversion from the above page following Pop-Up will appear and click on “Yes” for the conversion

The screenshot shows the InvestmentZ web interface. At the top, there's a header with the logo and market indices (NIFTY 50, NIFTY BANK). Below the header, there's a navigation bar with options like My Watchlist, Trade book, Order book, Net Position, Activity Log, Fund/Stock, and Logout. The main content area displays a table of orders. A pop-up dialog titled "MIS/CNC Conversion" is overlaid on the table, asking for confirmation to convert a specific order from CNC to MIS. The "Yes" button in the dialog is highlighted with a red box.

6.Activity Log

In activity log user can view all notification related to order placement


The screenshot shows the "Activity Log" section of the InvestmentZ platform. It features a table with columns: Client ID, Employee ID, Scrip, Exchange, Exc. Order No., Instrument, Strike Price, Order Type, Order Qty, Trade Qty, and Status. The table lists various order events, including completed, modified, and rejected orders. The status column contains buttons that correspond to the order status.

Client ID	Employee ID	Scrip	Exchange	Exc. Order No.	Instrument	Strike Price	Order Type	Order Qty	Trade Qty	Status
992934	400072005003	GMRINFRA	NSE	1100000001449046	EQ	0	BUY	1	1	COMPLETED
992934	400072005003	GMRINFRA	BSE	1533871800030122386	EQ	0	SELL	1	1	COMPLETED
992934	400072005003	GMRINFRA	NSE	1100000002068756	EQ	0	SELL	3	0	MODIFIED
992934	400072005003	GMRINFRA	NSE	1100000002068756	EQ	0	SELL	3	0	MODIFIED
992934	400072005003	GMRINFRA	NSE	1100000002068756	EQ	0	SELL	3	0	MODIFIED
992934	400072005003	GMRINFRA	NSE	1100000002068756	EQ	0	SELL	1	0	MODIFIED
992934	400072005003	GMRINFRA	NSE	1100000002068756	EQ	0	SELL	1	0	REJECTED
992934	400072005003	IFCI	NSE	1100000002068756	EQ	0	SELL	2	0	REJECTED
992934	400072005003	GMRINFRA	NSE	110000000219684	EQ	0	BUY	3	3	COMPLETED
992934	400072005003	GMRINFRA	NSE	110000000219684	EQ	0	BUY	3	0	CONFIRM

6.1 Status Description of Activity Log

1. Confirm-

An order that's been received, approved by the exchange and routed for execution.

**INVESTMENTZ**
FLEXIBLE. FIDELITY. FUTURE.
NIFTY 50 INDEX FUND - INVESTMENTZ

10/08/2018 4:32:45 PM

ORDER

TRADE

NOT

Client ID CNC/MIS	Employee Employee
992934	400072005003
CNC/NORMAL	Anamika Tiwari
992934	400072005003
CNC/NORMAL	Anamika Tiwari
992934	400072005003
CNC/NORMAL	Anamika Tiwari
992934	400072005003
CNC/NORMAL	Anamika Tiwari
992934	400072005003
CNC/NORMAL	Anamika Tiwari
992934	400072005003
CNC/NORMAL	Anamika Tiwari
992934	400072005003
CNC/NORMAL	Anamika Tiwari
992934	400072005003
CNC/NORMAL	Anamika Tiwari
992934	400072005003
CNC/NORMAL	Anamika Tiwari
992934	400072005003
CNC/NORMAL	Anamika Tiwari
992934	400072005003
CNC/NORMAL	Anamika Tiwari

Connected: ● B ● E

GMRINFRA

CONFIRM

NSE, CASH

Order Price: 18.20
Order Quantity 0/3

OPTION

BUY

PRICE

18.20

VALIDITY PRODUCT

DAY

INTERNAL ORDER ID - MIS/CNC

45974 - CNC/NORMAL

EXCHANGE ORDER ID

1100000002179684

EXCHANGE TRADE NUMBER

NA

DISCLOSE QUANTITY

0

ERROR

STATUS

CONFIRM

ORDER TYPE

LIMIT

TRIGGER PRICE

0.00

USER

317

INTERNAL ORDER TIME

2018/08/10 10:37:52

EXCHANGE ORDER TIME

2018/08/10 10:37:54


EXCHANGE TRADE TIME

PENDING QUANTITY

3

2. Completed-

An order that's been completed. You can find out the trade price, time of the transaction, number of shares bought or sold and other trade details from activity log and trade book page


INVESTMENTZ
BY SMC - SOUTH AFRICAN INVESTMENT MANAGEMENT LTD

10/08/2018 4:33:30 PM

● B ● E

ORDER

TRADE

NEWS

Client ID CNC/MIS	Employee Employee
892934	400072005003
CNC/NORMAL	Anamika Tiwari
892934	400072005003
CNC/NORMAL	Anamika Tiwari
892934	400072005003
CNC/NORMAL	Anamika Tiwari
892934	400072005003
CNC/NORMAL	Anamika Tiwari
892934	400072005003
CNC/NORMAL	Anamika Tiwari
892934	400072005003
CNC/NORMAL	Anamika Tiwari
892934	400072005003
CNC/NORMAL	Anamika Tiwari
892934	400072005003
CNC/NORMAL	Anamika Tiwari
892934	400072005003
CNC/NORMAL	Anamika Tiwari
892934	400072005003
CNC/NORMAL	Anamika Tiwari

Connected: ● B ● E

IFCI

NSE, CASH

COMPLETE

STATUS

COMPLETE

ORDER TYPE

MARKET

TRIGGER PRICE

0.00

USER

317

INTERNAL ORDER TIME

2018/08/10 15:29:45

EXCHANGE ORDER TIME

2018/08/10 15:29:45

EXCHANGE TRADE TIME

2018/08/10 15:29:45

PENDING QUANTITY

0

Traded Price 16.55

Traded Quantity 1/1

OPTION

SELL

PRICE

0.00

VALIDITY PRODUCT

DAY

INTERNAL ORDER ID - MIS/CNC

46391 - CNC/NORMAL

EXCHANGE ORDER ID

1100000006254690

EXCHANGE TRADE NUMBER

28082005

DISCLOSE QUANTITY

0

ERROR

3. Modified-

Order is modified. Client can modify only pending orders. Executed orders can not be modified

[illegible]

4. Cancelled-

Your order is cancelled and is no longer working at the exchange. No modifications or cancellations can be made after an order has been cancelled.

The screenshot shows the INVESTMENTZ app interface. On the left is a sidebar menu with options like ORDER, TRADE, and NOT. The main screen displays a 'CANCELLED' status for a 'BUY' order of 'GMRINFRA' on the 'NSE, CASH' market. The order details include: PRICE 20.45, VALIDITY PRODUCT DAY, INTERNAL ORDER ID - MIS/CNC 45878 - CNC/NORMAL, EXCHANGE ORDER ID 1100000001571610, EXCHANGE TRADE NUMBER NA, DISCLOSE QUANTITY 2, and ERROR. The right panel shows the status 'CANCELLED', order type 'STOP LOSS', trigger price 20.30, user 317, internal order time 2018/08/10 09:59:39, exchange order time 2018/08/10 15:29:29, exchange trade time, and pending quantity 2. The cancelled price is 20.45 and the cancelled quantity is 0/2.

5. Rejected

Your order was rejected. Rejections can occur for a number of reasons and you can view order details to see the specific rejection reason by right-clicking

The screenshot shows the INVESTMENTZ app interface. On the left is a sidebar menu with options like ORDER, TRADE, and NOT. The main screen displays a 'REJECTED' status for a 'SELL' order of 'GMRINFRA' on the 'NSE, CASH' market. The order details include: PRICE 0.00, VALIDITY PRODUCT DAY, INTERNAL ORDER ID - MIS/CNC 46389 - CNC/NORMAL, EXCHANGE ORDER ID -, EXCHANGE TRADE NUMBER NA, DISCLOSE QUANTITY 0, and ERROR. The right panel shows the status 'REJECTED', order type 'MARKET', trigger price 0.00, user 317, internal order time 2018/08/10 15:29:03, exchange order time 2018/08/10 15:29:03, exchange trade time, and pending quantity 9. The rejected price is 0.00 and the traded quantity is 0/9. The error message states: 'SYSTEM REJECTED : STOCK QUANTITY EXCEEDED..QUANTITY UTILISED INCLUDING CURRENT ORDER 12 AVAILABLE STOCK IS 0'.

the order in the Orders module and selecting Order Details.

6. Placed

Orders are not reaching to the exchange from the API server. Then it will come as placed in order book

7. Partial

When order is completed partially then it will show as partial in activity log. Partial order can be modified from order book page.

8. Inprocess

If order processor is not on then in order book inprocess will come

7.Net Position

The Net Position allows the user to view his current day position in a particular scrip. From net position user can square off their position. On clicking square off user can square off particular scrip and on clicking square off all user can square off all current day standing position.

INVESTMENTZ

BY GULF CAPITAL INVESTMENT MANAGEMENT LLC

NIFTY 50

12493.10↑
570.30(4.78%)

NIFTY BANK

33226.40↑
1851.00(5.90%)

SENSEX

40006.27↑
291.07(0.73%)

☆

My Watchlist

💬

Trade book

📄

Order book

📁

Net Position

📖

Activity Log

📈

Fund/Stock

🚪

Logout

☰

01/05/2019 1:32:49 PM

🔍

INVESTMENTZ-XX (200010)

FILTER

All

Only Today

Scrip (ALL)

Refresh

Today's P/L: 0.65

📄 PDF

📊 EXCEL

Scrip Exchange	Instrument Expiry	Strike Call/Put	Buy Qty	Buy Avg Buy Value	Sell Qty	Sell Avg Sell Value	Net Qty	Net Avg	Net Value	LTP	M2M	CNC/MIS	Square Off
IFCI NSE	EQ		0	0.00	5	9.13 45.65	-5	9.13	45.65	9.00	0.65	CNC/NORMAL	Sq Off
Total			0	0.00	5	45.65	-5	9.13	45.65		0.65		Sq Off all

8.Fund/Stock Transfer

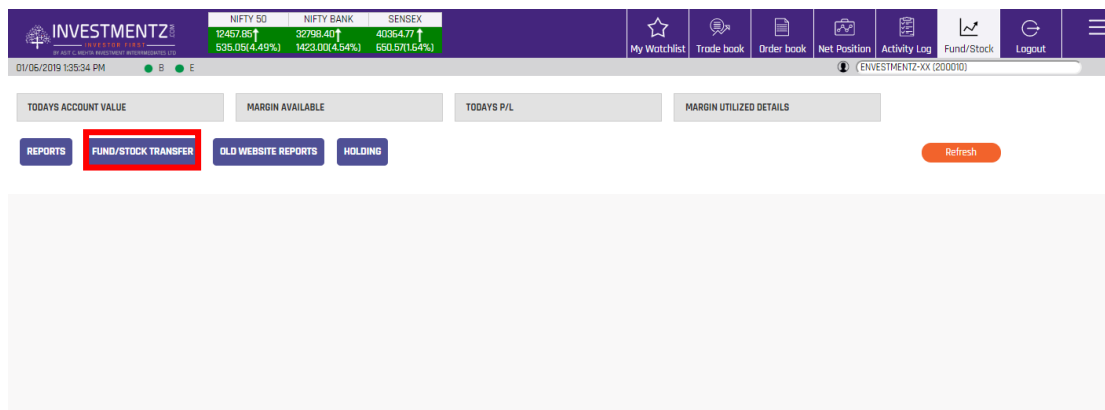
To transfer funds into your trading account you need to select the Fund/Stock tab and then select Fund/Stock Transfer

Then click on Fund/Stock Transfer to access the Payment Gateway page, where you can enter the amount you wish to transfer and click on Submit.

8.1.Fund/Stock Transfer for BOI Customers

For BOI Customers,

In order to be able to sell shares available in holdings or block funds to buy shares, you may click on the Fund/Stock Tab. There you will find the option of Fund/Stock Transfer.



Post this, you will be directed to another page, which allows you to block/release funds and lien/unlien stocks.

8.2.Fund Block:

You may block your funds by clicking on the Fund Block tab.

Bank of India (BOI)
Fund / Stock - Lien / Unlien

commonclientCode : 200010

Fund Block

Fund Release Margin Report Stock Reports

Client Name :
INVESTMENTZ-XX

Client Code :
200010

Segment:
Equity ▼

Bank Name:
BANK OF INDIA ▼

Account No.:
000110110000192

Lien Amount:

Submit

Reset

In the above page, select the segment, bank name and enter the amount you wish to unlien and click on Submit. You will see a Success message once this process is complete.

8.3.Lien Stocks:

In order to block stocks from your holdings, you may do so by clicking on Stock tab as shown in the image below.

Bank of India (BOI)
Fund / Stock - Lien / Unlien

commonclientCode : 200010

Fund Block Fund Release Margin Report

Stock Reports

Available shares from Bank of India

Display Holdings

DP ID: IN30074910641996

Post this, you may click on Display holdings. Incase you wish to search a particular scrip, you may enter the scrip name in the Search Scrip Name space provided and then click on Display holdings. The holdings are displayed as shown in the image below.

Bank of India (BOI)

Fund / Stock - Lien / Unlien

commandClientCode : 200010

[Fund Block](#) [Fund Release](#) [Margin Report](#) **Stock** [Reports](#)

Available shares from Bank of India

[Display Holdings](#)

DP ID: IN30074910641996

Search Scrip Name :

DPID	ISINCode	ISINName	TotalQuantity	BlockQuantity	FreeQuantity	Action
IN30074910641996	INE270A01011	ALOK INDUSTRIES LIMITED EQ	1	0	1	Lien Unlien
IN30074910641996	INE776C01039	GMR INFRASTRUCTURE LIMITED EQ NEW	5	0	5	Lien Unlien
IN30074910641996	INE039A01010	IFCI LIMITED EQ	15	15	0	Lien Unlien
IN30074910641996	INE645C01010	KABSONS INDS. EQ	50	0	50	Lien Unlien

In order to Lien stocks, click on Lien. A pop-up appears as shown in image below:

[Fund Block](#) [Fund Release](#) [Margin Report](#)

Available shares from Bank of India

[Display Holdings](#)

DP ID: IN30074910641996

Search Scrip Name :

Lien Details

ISINCode

ISINName

BlockQuantity

[Save](#)

[Close](#)

DPID	ISINCode	ISINName	TotalQuantity	BlockQuantity	FreeQuantity	Action
------	----------	----------	---------------	---------------	--------------	--------

Enter the quantity you wish to lien and click on Save.

In order to Unlien stocks, click on Unlien in the window below:

Bank of India (BOI)

Fund / Stock - Lien / Unlien

commonclientCode : 200010

Fund Block
Fund Release
Margin Report
Stock
Reports

Available shares from Bank of India

Display Holdings

DP ID: IN30074910641996

Search Scrip Name :

DPID	ISINCode	ISINName	TotalQuantity	BlockQuantity	FreeQuantity	Action
IN30074910641996	INE270A01011	ALOK INDUSTRIES LIMITED EQ	1	0	1	Lien Unlien
IN30074910641996	INE776C01039	GMR INFRASTRUCTURE LIMITED EQ NEW	5	0	5	Lien Unlien
IN30074910641996	INE039A01010	IFCI LIMITED EQ	15	15	0	Lien Unlien
IN30074910641996	INE645C01010	KABSONS INDS. EQ	50	0	50	Lien Unlien

A pop-up appears as shown in image below:

Fund Block
Fund Release
Margin Report

Available shares from Bank of India

Display Holdings

DP ID: IN30074910641996

Search Scrip Name :

DPID	ISINCode	ISINName	TotalQuantity	BlockQuantity	FreeQuantity	Action
IN30074910641996	INE270A01011	ALOK INDUSTRIES LIMITED EQ	1	0	1	Lien Unlien

UnLien Details

ISINCode

ISINName

FreeQuantity

Save

Close

Enter the quantity you wish to Unlien and click on Save.

You may check the funds blocked/released and the stocks liened/unliened by clicking the Reports tab shown below.

Bank of India (BOI)

Fund / Stock - Lien / Unlien

commonclientCode : 200010

Fund Block
Fund Release
Margin Report
Stock
Reports

Funds/Stocks Reports

Report For : Stock Fund

From Date : dd/mm/yyyy

To Date : dd/mm/yyyy

Submit
Reset

Select Stock or Fund and enter the From date and To date and then click on Submit. The report showing the stocks liened/unlienied or the fund blocked or released will be displayed.

9.Menu

The screenshot displays the INVESTMENTZ trading platform. At the top, there's a header with market indices (NIFTY 50, NIFTY BANK, SENSEX) and a navigation bar with icons for Watchlist, Trade book, Order book, Net Position, Activity Log, Fund/Stock, and Logout. Below the header, a table lists various financial instruments with columns for instrument name, price, quantity, and status. On the right side, a sidebar menu is visible, listing various functions and reports available to the user.

Instrument	Price	Quantity	Status
CASH	1234.56	100	Open
BANK	1234.56	100	Open
STOCK	1234.56	100	Open
FUND	1234.56	100	Open

- VERSION 9.0.10
- INVESTMENTZ-XX (200010)
- LOGOUT
- BACKOFFICE REPORTS
- EQUITY FORM FILE
- PORTFOLIO-MY HOLDING
- FUND TRANSFER
- CALCULATOR
- RESEARCH CALLS
- SETTINGS
- USER GUIDE
- RBI REF.RATE
- CURRENCY SPOT RATES
- FAQ
- DISCLAIMER

- 1. Logout-** User can logout trading platform on clicking logout from menu tab
- 2. Back Office Reports-** To check back office report. From back office page user can check and download all reports of trading, mutual fund etc.

3. **Portfolio My Holdings-** User can check all their holdings on clicking Portfolio My Holdings

4. **Fund Transfer-** To Transfer the funds from personal account to Demat account and withdraw the funds from Demat account to personal account

5. **Calculator-** It help user to calculate volatility of market

6. **User Guide-** This will help user to understand our trading platform

7. **Contact Us and Help Chat-** This will help user to ask any queries related to our trading platform from our customer service

10. Logout-

On clicking logout from the header and menu user can logout trading platform

INVESTMENTZ

INDIAN INVESTMENT TRADING PLATFORM

01/06/2019 12:12:25 PM

B

E

Buy/Sell

NIFTY 50

12515.80

593.00(4.97%)

NIFTY BANK

33359.40

1994.00(5.96%)

SENSEX

40261.24

547.04(1.38%)

My Watchlist

Trade book

Order book

Net Position

Activity Log

Fund/Stock

Logout

ENVESTMENT-XX (20000)

SEARCH SCRIP SYMBOL

Add

Watchlist

KAJAL

Add New

Delete

Scrip (ALL)

Add TO WATCHLIST

NSE

CASH

Scrip / Exchange	Change	Instrument / Expiry	Strike / Call Put	Buy Qty	Buy Price	Sell Price	Sell Qty	LTP / LTQ	LTD / LTD	Total Qty / ATP	High / Low	Open / Pr Close	Open Int
TITAN NSE	0.25 (0.02%)	CASH_EQ		285	1236.00 (BUY)	1279.95 (SELL)	26	1236.00	01/06/2019 13:28:07	4651	1250.00 1281.35	1235.75 1235.75	1615500.00
GMRINFRA NSE	-0.45 (-2.90%)	CASH_EQ		500	15.00 (BUY)	0.00 (SELL)	0	15.05	01/06/2019 13:11:24	31221	17.05 15.33	15.95 15.50	29520000.00
BATAINDIA NSE	0.00 (0.00%)	CASH_EQ		0	0.00 (BUY)	1324.90 (SELL)	14	1324.90	01/06/2019 13:08:04	18	1324.90 1324.89	1324.90 1324.90	300850.00
BRITANNIA NSE	103.05 (3.53%)	CASH_EQ		217	3025.00 (BUY)	3200.10 (SELL)	25	3025.00	01/06/2019 13:22:58	2319	3200.10 3191.78	3047.75 2921.95	84000.00
ASIANPAINT NSE	82.70 (5.88%)	CASH_EQ		14	1490.00 (BUY)	0.00 (SELL)	0	1490.00	01/06/2019 13:30:42	3501	1530.00 1498.45	1530.00 1407.30	889200.00
DMART NSE	-223.10 (-16.86%)	CASH_EQ		0	0.00 (BUY)	1100.00 (SELL)	14	1100.00	01/06/2019 13:24:59	128	1500.00 1382.30	1323.10 1323.10	0.00
RELIANCE NSE	119.85 (9.01%)	CASH_EQ		4824	1449.00 (BUY)	1450.00 (SELL)	10744	1450.00	01/06/2019 13:32:01	15752448	1549.00 1476.03	1330.15 1330.15	22182500.00
BAJFINANCE BSE	0.00 (0.00%)	CASH_EQ		0	0.00 (BUY)	3469.70 (SELL)	181	3469.70	01/06/2019 12:48:25	201	3469.70 3467.66	3469.70 3469.70	0.00
ITC NSE	27.85 (10.00%)	CASH_EQ		25	306.10 (BUY)	0.00 (SELL)	0	306.40	01/06/2019 13:30:43	345439	306.40 284.53	291.50 278.55	23109600.00
BAJAJFINSV NSE	409.35 (50.00%)	CASH_EQ		10	8500.00 (BUY)	8595.00 (SELL)	5	8597.30	01/06/2019 13:18:26	1910	8597.30 8594.78	8187.95 8187.95	63250.00