



# FUNDZ BAZAR

***e**invest Anytime, Anywhere*

***Quick, Hassle Free, Secure &  
Online Mutual Fund Investment Platform***

- ❖ **Prudent Corporate Advisory Services Ltd** offers specialized services in the area of personal and corporate investment planning through Mutual Funds, Stocks, Insurance, Bonds ,NPS, FD, LAS etc.
- ❖ Has a widespread branch network across **21 states, 136 branches**
- ❖ Managing more than **Rs.1,03,000 Crores** in terms of **AUM**
- ❖ More than **33308 AMFI certified Mutual Fund Distributors** are enrolled with us as our channel partners.
- ❖ Prudent Corporate got **listed on National Stock Exchange (NSE) and Bombay Stock Exchange (BSE)** on 20th May 2022.

- ❖ Its an online investment platform created to simplify investing in mutual funds and enjoy the freedom and flexibility to plan, choose, transact and keep a track of your investment
- ❖ Complete **Paperless** transaction – for free
- ❖ **Round the clock** online investment facility for SIP, Purchase, Switch, Redemption, etc
- ❖ Invest, Manage and Track all investments of your family under **Single Login**
- ❖ Make **Investments in Joint Names** by setting up multiple combinations for Joint Investments
- ❖ Transact anytime, anywhere through **FundzBazar Mobile App**
- ❖ Various other tools to simplify your investing experience

## ❖ Easy Investing

- Complete Paperless transactions - For Free
- Online investment facility for SIP, Purchase, Switch Redemption, etc.
- Round the clock transaction facility

## ❖ Easy Tracking

- Track your investments anytime, anywhere – For Free
- Excellent portfolio management tools & reports to manage & access the portfolio of your family
- Various reports

## ❖ Wide Variety of Funds

- Wide range of mutual fund schemes from leading AMCs
- Create a customized portfolio by choosing funds on your own
- Shortlisted funds provided with internal research

## ❖ **Research & Expertise**

- Scheme recommendation based on our extensive research
- Investment solutions based on your risk appetite with the help of state of art technology
- Team of well qualified experts and channel partners at your service
- Indepth research on Mutual Fund schemes

## ❖ **Safe & Secure**

- Verified by Leading agency
- Data & Password Encryption
- Bank level security
- Confidentiality of your personal information & documents
- No sharing of data with third party vendor

## FundzBazar Features



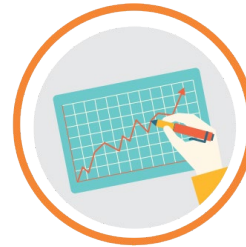
### PRODUCT OFFERING

Mutual Funds, NPS, FD, LAS, Bond, Gold Accumulation Plan (GAP), Stock Broking, Insurance, SGB, Credit Basket, PMS, AIF, Liquiloans, Smallcase



### ACCOUNT OPTIONS

Single login account for Individual, Minor, HUF & NRI with multiple holding combinations



### PLANNING

Risk Profiling, Financial Calculator, Goal Planning, Shubh Shuruat, WRAP Portfolios



### TRANSACTION

Purchase, SIP, STP, Switch, SWP, InstaFundz, Redemption, Trigger Facility



### REPORTS

Portfolio Valuation, Capital Gain/Loss, Dividend Income Statement, SIP/STP Report, Multi product combined portfolio, payment detail, transaction detail, AUM detail, consolidated, Folio static



### SCHEME RESEARCH

Fundz Analyzer, Peer Comparison, SIP Return Comparison, Rolling Return Comparison, Debt Fundz Analyzer, Return Analyzer



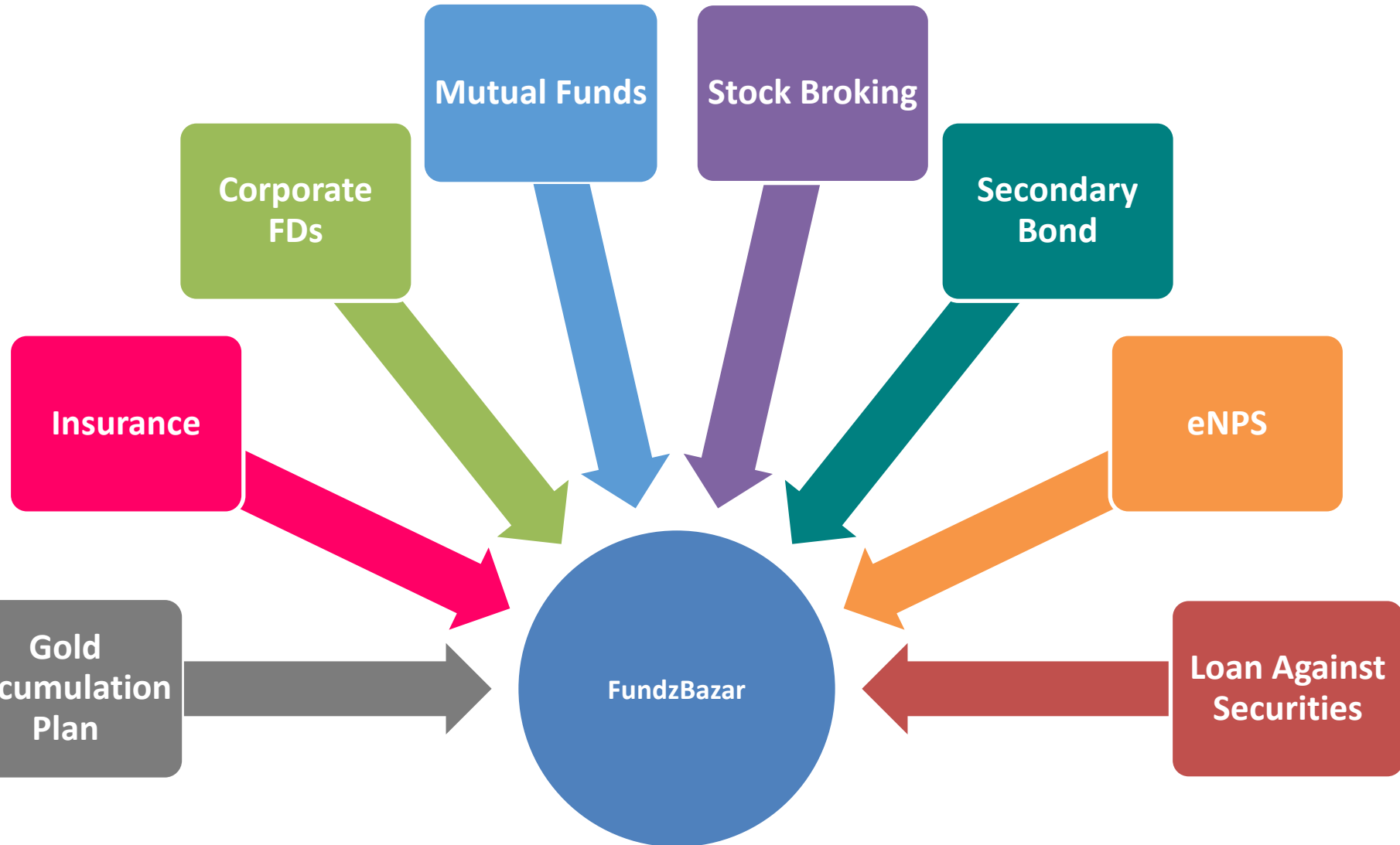
### INDUSTRY RESEARCH

Trends in FII/MFs, AUM Analysis, Cash Analysis, What's In/What's Out, Sector Allocation Analysis



### MANAGE ACCOUNT

Account Details, Add Client, Manage Joint Holder, Manage Mandate, Manage Query



## Register & Invest online in the name of

*Individual*



*Minor*



*NRI*



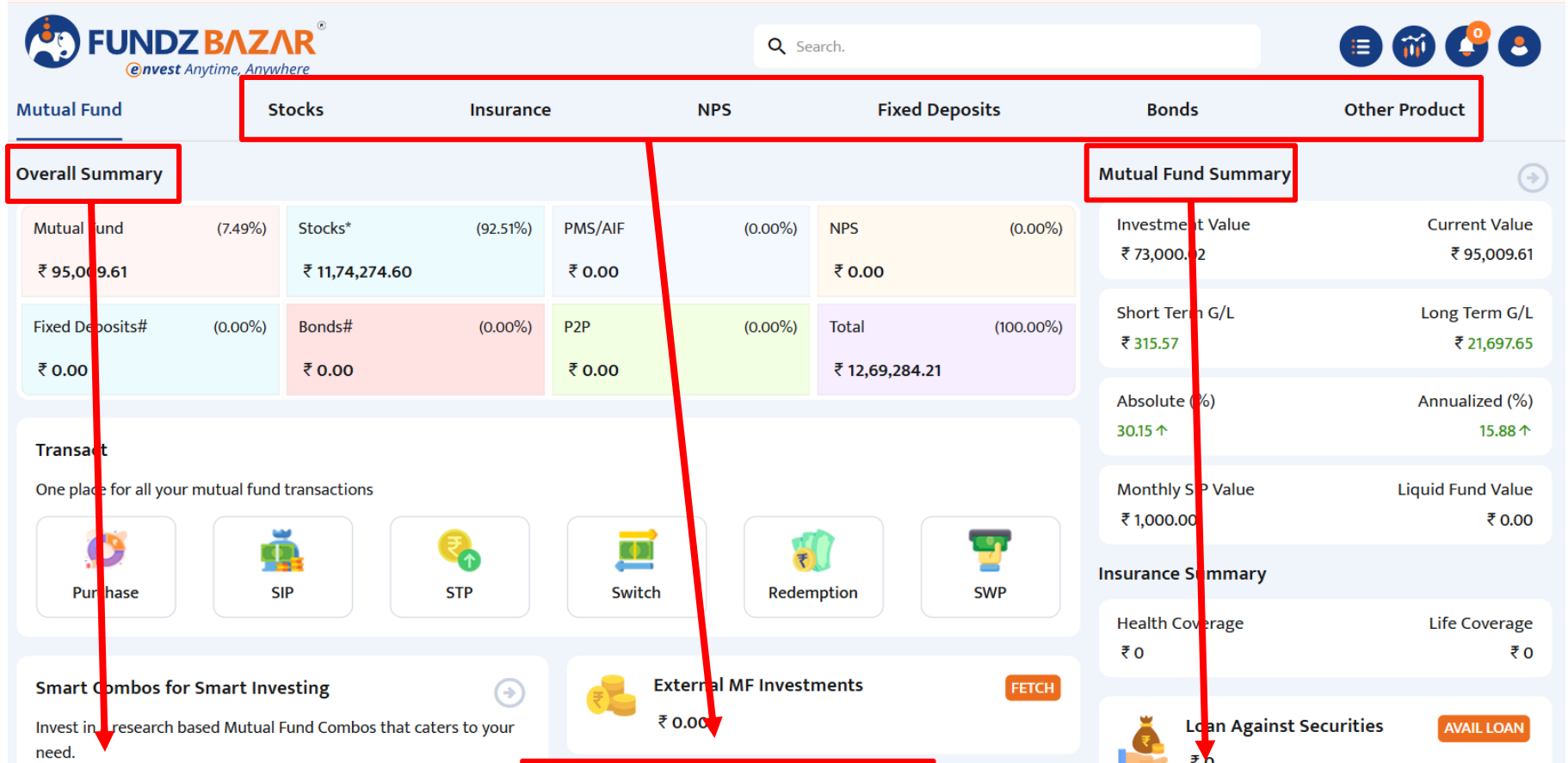
*HUF*



*Corporate*



# Dashboard : Investment Summary



The dashboard features a top navigation bar with the Fundz Bazar logo, a search bar, and user profile icons. Below this is a category menu with tabs for Mutual Fund, Stocks, Insurance, NPS, Fixed Deposits, Bonds, and Other Product. The main content area is divided into several sections:

- Overall Summary:** A central table showing investment breakdowns for Mutual Fund, Fixed Deposits, Stocks, Bonds, PMS/AIF, P2P, NPS, and Total.
- Mutual Fund Summary:** A sidebar on the right showing metrics like Investment Value, Current Value, Short Term G/L, Long Term G/L, Absolute (%), Annualized (%), Monthly SIP Value, and Liquid Fund Value.
- Insurance Summary:** A section showing Health Coverage and Life Coverage.
- Loan Against Securities:** A section with an 'AVAIL LOAN' button.
- Transaction Section:** A row of icons for Purchase, SIP, STP, Switch, Redemption, and SWP.
- Smart Combos for Smart Investing:** A section for research-based Mutual Fund Combos.
- External MF Investments:** A section with a 'FETCH' button.

**Overall Summary**

Mutual Fund (7.49%)	₹ 95,009.61	Stocks* (92.51%)	₹ 11,74,274.60	PMS/AIF (0.00%)	₹ 0.00	NPS (0.00%)	₹ 0.00
Fixed Deposits# (0.00%)	₹ 0.00	Bonds# (0.00%)	₹ 0.00	P2P (0.00%)	₹ 0.00	Total (100.00%)	₹ 12,69,284.21

**Mutual Fund Summary**

Investment Value	₹ 73,000.02	Current Value	₹ 95,009.61
Short Term G/L	₹ 315.57	Long Term G/L	₹ 21,697.65
Absolute (%)	30.15 ↑	Annualized (%)	15.88 ↑
Monthly SIP Value	₹ 1,000.00	Liquid Fund Value	₹ 0.00


This section provides family level summary of overall investments, including mutual funds, stocks, PMS/AIF, NPS (National Pension System), FDs (Fixed Deposits), bonds, and P2P.

This section provides a in detailed summary about each products.

This section displays family level summary bifurcated into client-wise detailed portfolios, gain/loss statements, portfolios categorized by nature and sub-nature, as well as allocation by company and sector.

# Invest : How to invest using FundzBazar

Transact instantly in Mutual Funds through Dashboard.



Overall Summary

Mutual Fund (7.49%) ₹ 95,009.61	Stocks* (92.51%) ₹ 11,74,274.60	PMS/AIF (0.00%) ₹ 0.00	NPS (0.00%) ₹ 0.00
Fixed Deposits# (0.00%) ₹ 0.00	Bonds# (0.00%) ₹ 0.00	P2P (0.00%) ₹ 0.00	Total (100.00%) ₹ 12,69,284.21

Mutual Fund Summary

Investment Value ₹ 73,000.02	Current Value ₹ 95,009.61
Short Term G/L ₹ 315.57	Long Term G/L ₹ 21,697.65
Absolute (%) 30.15 ↑	Annualized (%) 15.88 ↑
Monthly SIP Value ₹ 1,000.00	Liquid Fund Value ₹ 0.00

Insurance Summary

Health Coverage ₹ 0	Life Coverage ₹ 0
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Smart Combos for Smart Investing

Invest in a research based Mutual Fund Combos that caters to your need.

External MF Investments  
₹ 0.00 [FETCH](#)

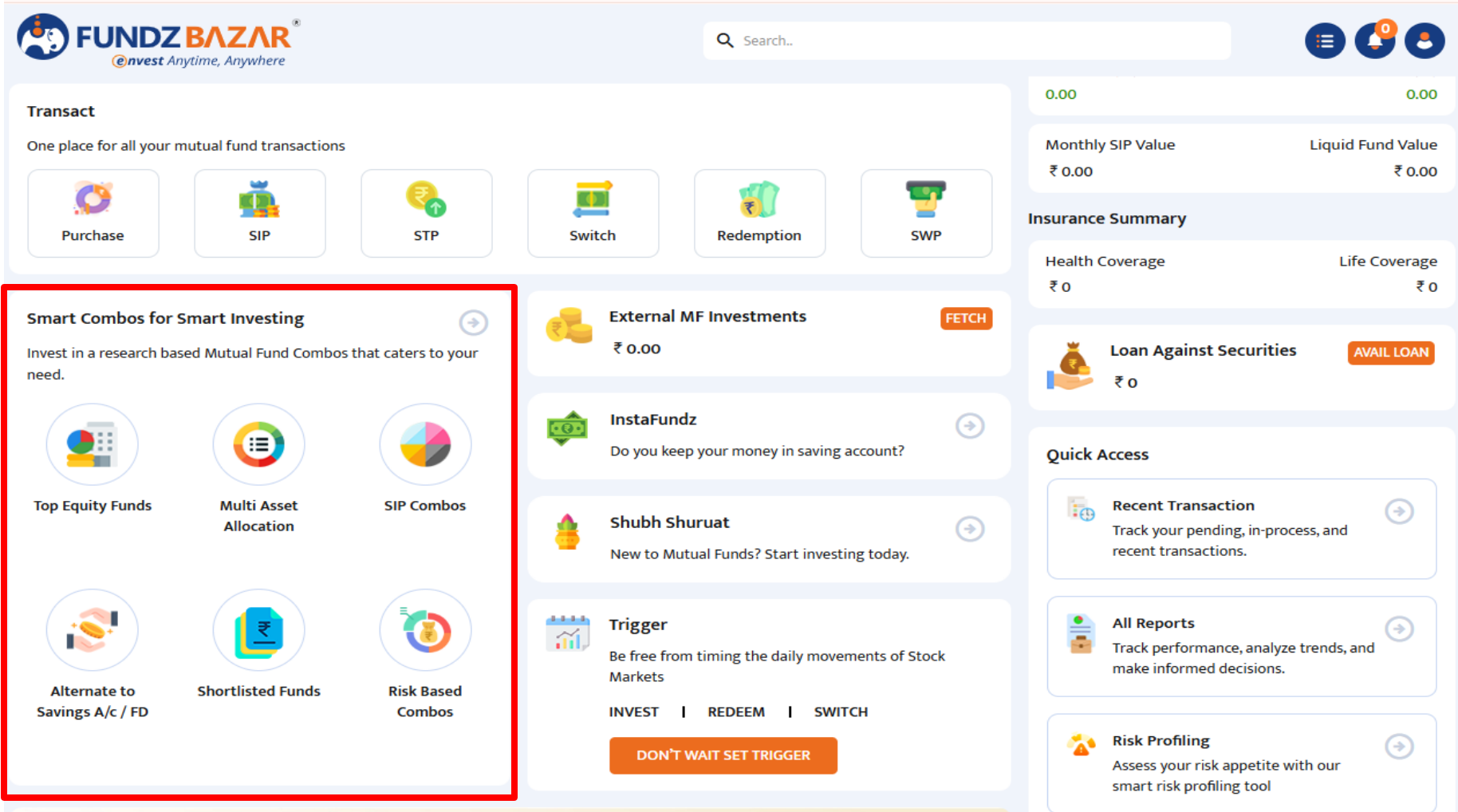
Loan Against Securities  
₹ 0 [AVAIL LOAN](#)

### Transact

One place for all your mutual fund transactions

- Purchase
- SIP
- STP
- Switch
- Redemption
- SWP

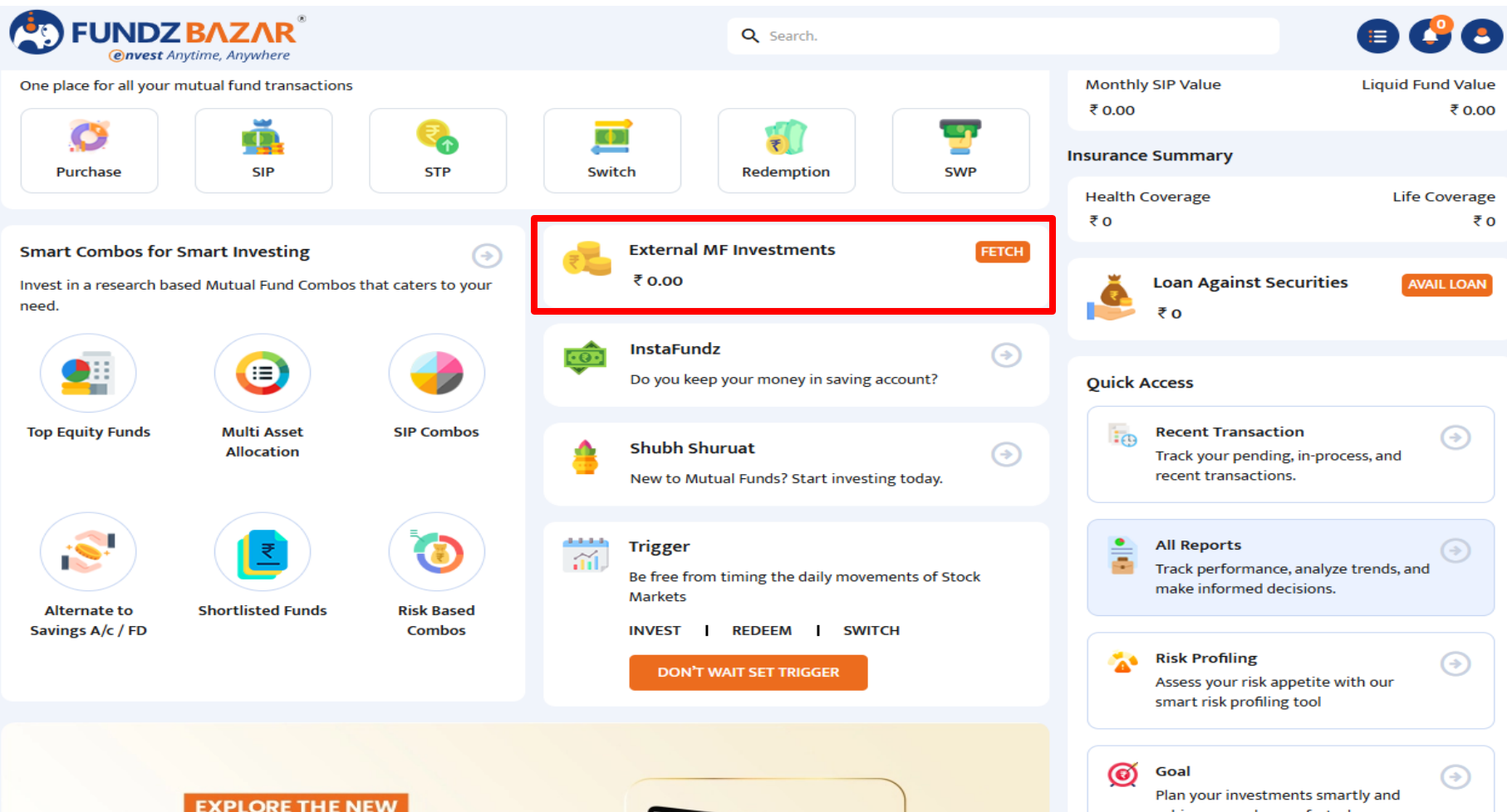
**Smart Combos-** Invest in a research based Mutual Fund Combos that caters to your need.



The screenshot displays the Fundz Bazar website interface. At the top, the logo and tagline are visible. A search bar and navigation icons are on the right. The main content area is divided into several sections:

- Transact:** A section titled "One place for all your mutual fund transactions" featuring icons for Purchase, SIP, STP, Switch, Redemption, and SWP.
- Smart Combos for Smart Investing:** A highlighted section with the subtext "Invest in a research based Mutual Fund Combos that caters to your need." It contains six circular icons representing different investment options: Top Equity Funds, Multi Asset Allocation, SIP Combos, Alternate to Savings A/c / FD, Shortlisted Funds, and Risk Based Combos.
- External MF Investments:** A card showing "External MF Investments" with a value of ₹ 0.00 and a "FETCH" button.
- InstaFundz:** A card asking "Do you keep your money in saving account?" with a right-pointing arrow.
- Shubh Shruat:** A card for new investors: "New to Mutual Funds? Start investing today." with a right-pointing arrow.
- Trigger:** A card encouraging users to "Be free from timing the daily movements of Stock Markets" with options for INVEST, REDEEM, and SWITCH, and a "DON'T WAIT SET TRIGGER" button.
- Insurance Summary:** A section showing "Health Coverage" and "Life Coverage" both at ₹ 0.
- Loan Against Securities:** A card showing "Loan Against Securities" with a value of ₹ 0 and an "AVAIL LOAN" button.
- Quick Access:** A section with four cards: "Recent Transaction" (Track pending, in-process, and recent transactions), "All Reports" (Track performance, analyze trends, and make informed decisions), and "Risk Profiling" (Assess your risk appetite with our smart risk profiling tool).

**CAS** is an investor friendly feature which enables you to view your mutual fund investments with all distributors across all AMCs at single place.



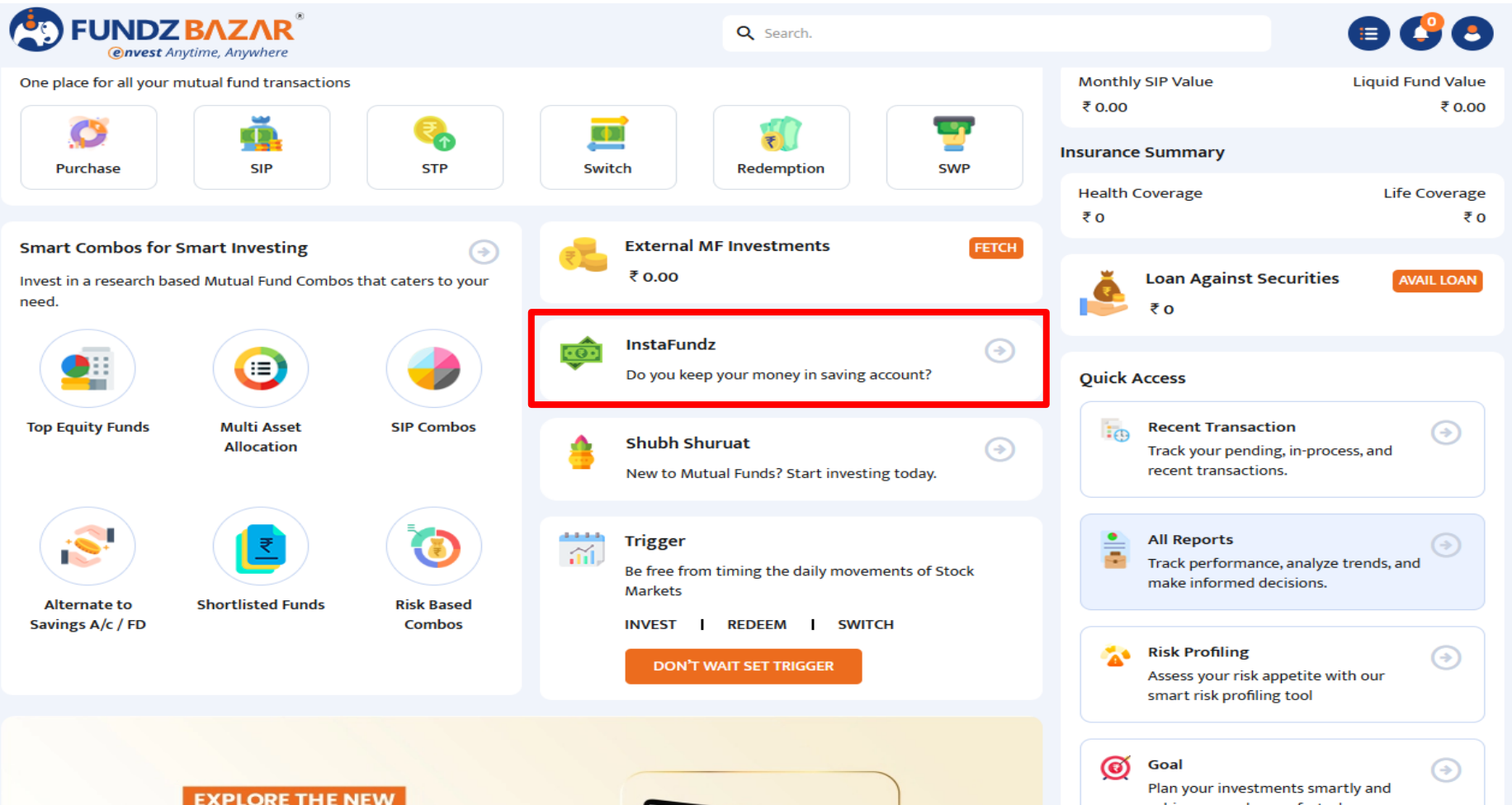
The screenshot displays the Fundz Bazar home page interface. At the top, the logo and tagline "invest Anytime, Anywhere" are visible. A search bar and navigation icons are present in the top right. The main content area is divided into several sections:

- One place for all your mutual fund transactions:** A row of six icons for Purchase, SIP, STP, Switch, Redemption, and SWP.
- Smart Combos for Smart Investing:** A section with a sub-header "Invest in a research based Mutual Fund Combos that caters to your need." and six circular icons for Top Equity Funds, Multi Asset Allocation, SIP Combos, Alternate to Savings A/c / FD, Shortlisted Funds, and Risk Based Combos.
- External MF Investments:** A central card with a red border, featuring a gold coin icon, the text "External MF Investments", a value of "₹ 0.00", and a "FETCH" button.
- InstaFundz:** A card with a green bill icon and the text "Do you keep your money in saving account?".
- Shubh Shruat:** A card with a gold coin icon and the text "New to Mutual Funds? Start investing today."
- Trigger:** A card with a calendar icon and the text "Be free from timing the daily movements of Stock Markets", including "INVEST | REDEEM | SWITCH" options and a "DON'T WAIT SET TRIGGER" button.
- Summary Cards:** On the right, cards for "Monthly SIP Value" (₹ 0.00), "Liquid Fund Value" (₹ 0.00), "Insurance Summary" (Health and Life Coverage), and "Loan Against Securities" (₹ 0) with an "AVAIL LOAN" button.
- Quick Access:** A section with four cards: "Recent Transaction", "All Reports", "Risk Profiling", and "Goal".

At the bottom left, there is a yellow banner with the text "EXPLORE THE NEW".

- ❖ Facility offered for
  - Axis Liquid Fund (only growth option)
  - Nippon India Liquid Fund (only growth option) &
  - DSP Liquidity Fund (only growth option)
- ❖ Currently, only Resident Individual or Minor are eligible
- ❖ Redeem in just 30 minutes, 24x7 and 365 days
- ❖ Redeem maximum upto Rs. 50000 per day or 90% of the current value whichever is lower including multiple transactions
- ❖ Investor's bank should be Immediate Payment Service (IMPS) enabled & folio should contain the IFSC Code

**InstaFundz** - Invest in liquid funds and get higher returns. Redeem your funds and receive money in just 30 minutes

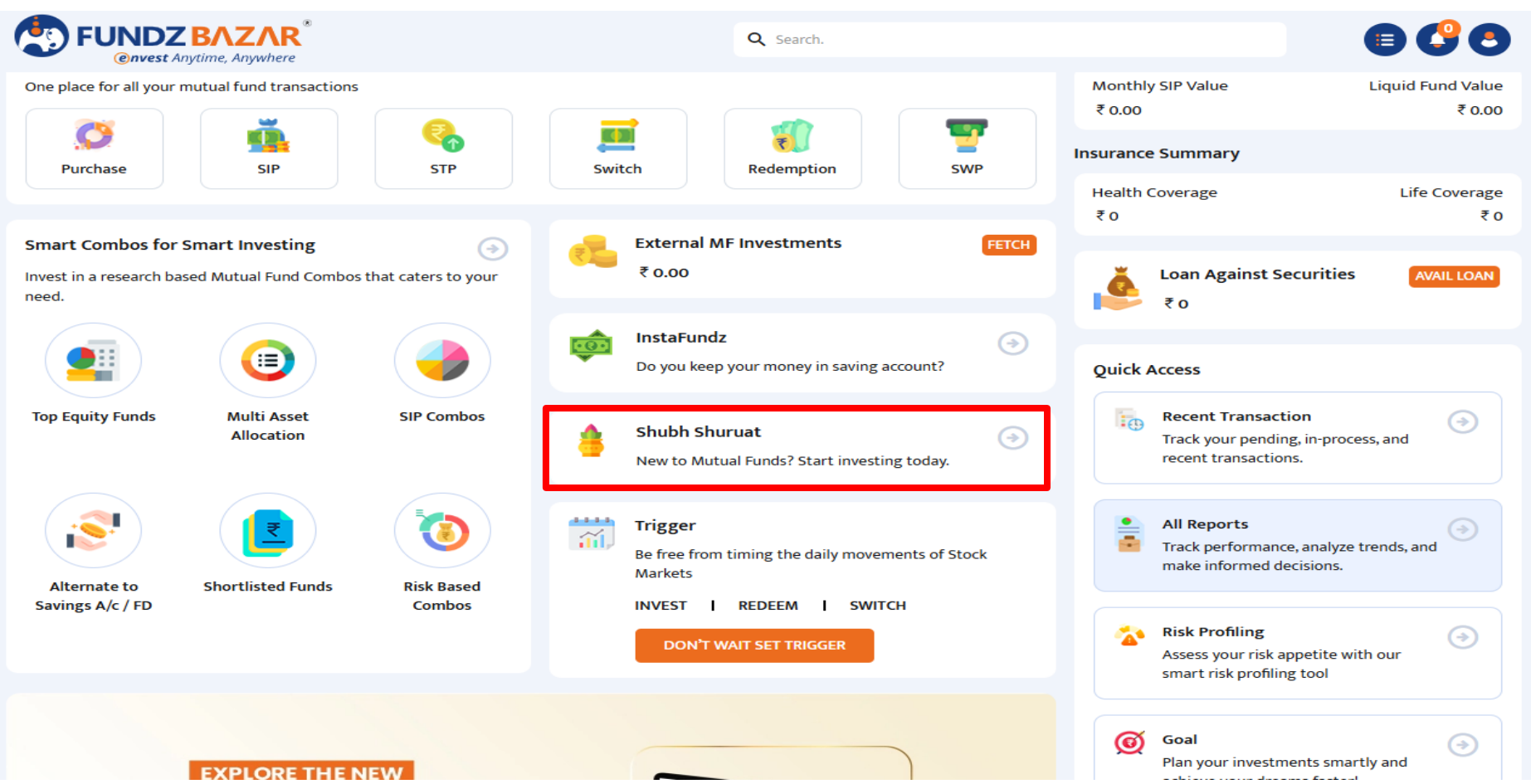


The screenshot shows the Fundz Bazar home page. At the top, there's a search bar and navigation icons. Below that, a section titled "One place for all your mutual fund transactions" features six icons: Purchase, SIP, STP, Switch, Redemption, and SWP. To the right, there are two summary cards: "Monthly SIP Value ₹ 0.00" and "Liquid Fund Value ₹ 0.00". Below these is an "Insurance Summary" section with "Health Coverage ₹ 0" and "Life Coverage ₹ 0". A "Loan Against Securities" section shows "₹ 0" and an "AVAIL LOAN" button. The main content area is divided into several sections: "Smart Combos for Smart Investing" with a sub-header "Invest in a research based Mutual Fund Combos that caters to your need." and six icons for "Top Equity Funds", "Multi Asset Allocation", "SIP Combos", "Alternate to Savings A/c / FD", "Shortlisted Funds", and "Risk Based Combos". A red box highlights the "InstaFundz" card, which includes the text "Do you keep your money in saving account?". Below this are "External MF Investments" (₹ 0.00, FETCH button), "Shubh Shuruat" (New to Mutual Funds? Start investing today.), and "Trigger" (Be free from timing the daily movements of Stock Markets, INVEST | REDEEM | SWITCH, DON'T WAIT SET TRIGGER button). On the right side, there's a "Quick Access" section with four cards: "Recent Transaction" (Track your pending, in-process, and recent transactions.), "All Reports" (Track performance, analyze trends, and make informed decisions.), "Risk Profiling" (Assess your risk appetite with our smart risk profiling tool), and "Goal" (Plan your investments smartly and achieve your dreams faster).

EXPLORE THE NEW

# Home Page : Start your investing journey with Shubh Shuruat

**Shubh Shuruat** - Ideal for first time investors who don't want to go into complexity of financial planning and goal based investing. Selection of Scheme is based on various quantitative and qualitative researches.



The screenshot shows the Fundz Bazar home page dashboard. At the top, there is a search bar and user profile icons. Below the header, a navigation bar contains icons for Purchase, SIP, STP, Switch, Redemption, and SWP. The main content area is divided into several sections:

- Smart Combos for Smart Investing:** A section with a sub-header "Invest in a research based Mutual Fund Combos that caters to your need." It features six circular icons representing different investment options: Top Equity Funds, Multi Asset Allocation, SIP Combos, Alternate to Savings A/c / FD, Shortlisted Funds, and Risk Based Combos.
- External MF Investments:** A card showing "External MF Investments" with a value of ₹ 0.00 and a "FETCH" button.
- InstaFundz:** A card asking "Do you keep your money in saving account?" with a right-pointing arrow.
- Shubh Shuruat:** A card highlighted with a red border, featuring a gift icon and the text "Shubh Shuruat" and "New to Mutual Funds? Start investing today." with a right-pointing arrow.
- Trigger:** A card with a calendar icon, text "Be free from timing the daily movements of Stock Markets", and buttons for "INVEST | REDEEM | SWITCH" and "DON'T WAIT SET TRIGGER".
- Summary Cards:** On the right side, there are summary cards for "Monthly SIP Value" (₹ 0.00), "Liquid Fund Value" (₹ 0.00), "Insurance Summary" (Health Coverage ₹ 0, Life Coverage ₹ 0), and "Loan Against Securities" (₹ 0) with an "AVAIL LOAN" button.
- Quick Access:** A section with four cards: "Recent Transaction" (Track your pending, in-process, and recent transactions), "All Reports" (Track performance, analyze trends, and make informed decisions), "Risk Profiling" (Assess your risk appetite with our smart risk profiling tool), and "Goal" (Plan your investments smartly and achieve your dreams faster).

At the bottom left, there is a button labeled "EXPLORE THE NEW".

**Trigger-** The Trigger Facility allows you to transact based on predefined events. Triggers can be set based on the Sensex value, NAV value, or a specific date.

**External MF Investments** FETCH  
₹ 0.00

**InstaFundz** →  
Do you keep your money in saving account?

**Shubh Shuruat** →  
New to Mutual Funds? Start investing today.

**Trigger**  
Be free from timing the daily movements of Stock Markets  
INVEST | REDEEM | SWITCH  
**DON'T WAIT SET TRIGGER**

**FUNDZ BAZAR**  
einvest Anytime, Anywhere

Search

**SENSEX BASED TRIGGER**  
When the Sensex reaches a particular level (<, >, ≥) at the end of any day, money can be invested, redeemed, or switched.

**NAV BASED TRIGGER**  
Investments can be redeemed or switched to another scheme based on the closing NAV of the previous day.

**TRIGGER BASED ON SPECIFIC DATE**  
You can set a trigger to redeem or switch your investment fully or partially on a particular future date.

The Trigger Facility allows you to transact based on predefined events. Triggers can be set based on the Sensex value, NAV value, or a specific date.

**INVEST**  
Set triggers for new investments based on the closing values of the Sensex and NAV.  
 Select

**REDEMPTION**  
Redeem fully or partially based on triggers such as Sensex value, absolute gain, NAV, or a particular date.  
 Select

**SWITCH**  
Switch your fund fully or partially to another scheme based on triggers such as Sensex value, absolute gain, NAV, or a particular date.  
 Select

KEEP TRIGGER EFFECTIVE FOR PERIOD

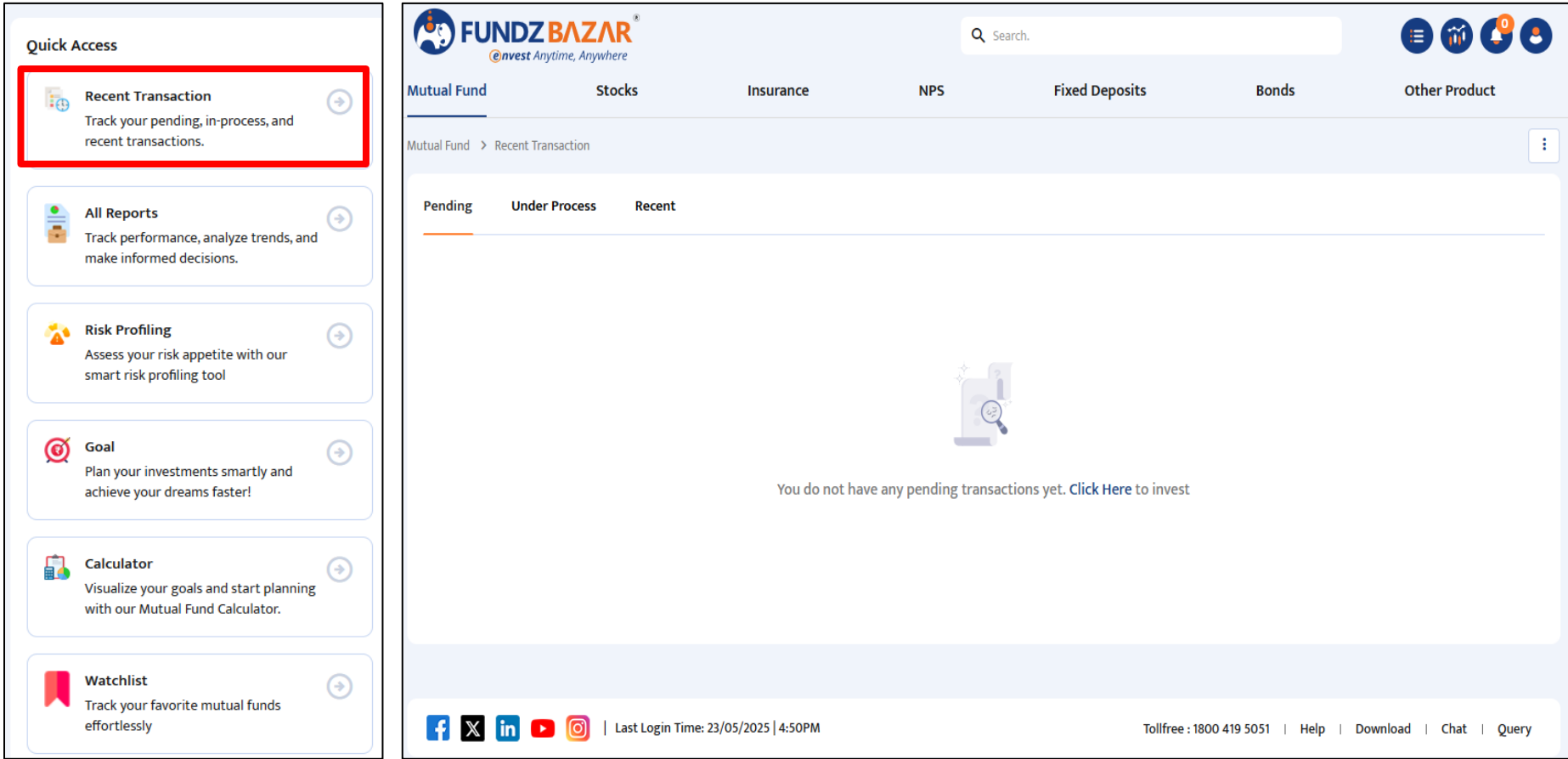
Trigger valid From: 28/05/2025

Trigger valid to: 28/05/2026

**SET TRIGGER**

# Quick Access : Recent Transactions

**Recent Transaction-** Use this feature to see recent transactions.

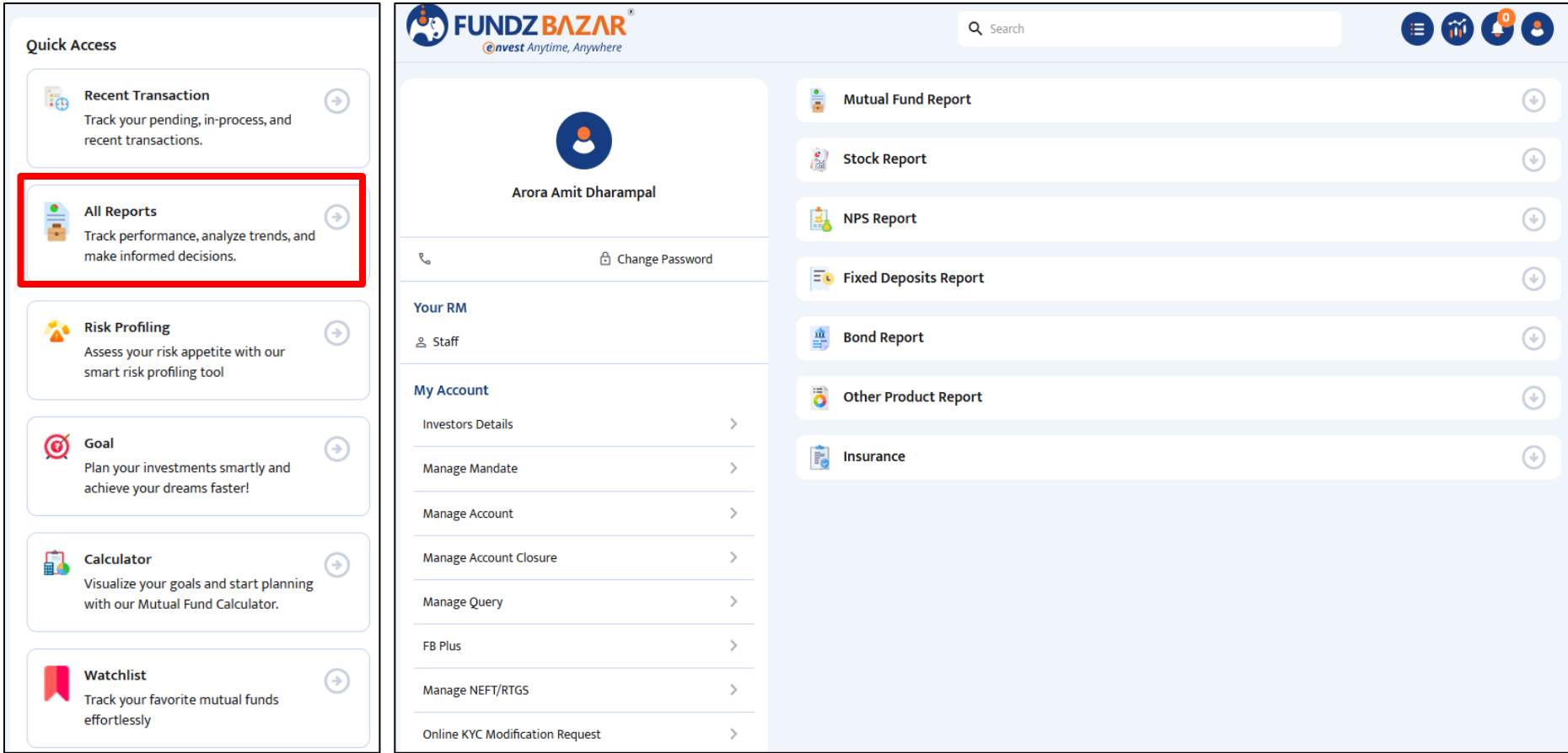


The screenshot displays the FUNDZ BAZAR user interface. On the left, a 'Quick Access' sidebar lists several features: 'Recent Transaction' (highlighted with a red box), 'All Reports', 'Risk Profiling', 'Goal', 'Calculator', and 'Watchlist'. The main content area shows the 'Recent Transaction' page under the 'Mutual Fund' category. It features a search bar, navigation tabs for 'Mutual Fund', 'Stocks', 'Insurance', 'NPS', 'Fixed Deposits', 'Bonds', and 'Other Product', and a sub-navigation for 'Pending', 'Under Process', and 'Recent'. A central message states: 'You do not have any pending transactions yet. [Click Here](#) to invest'. The footer includes social media icons, the last login time (23/05/2025 | 4:50PM), and contact information (Tollfree: 1800 419 5051 | Help | Download | Chat | Query).

In the Home page you can scroll down to find quick links and in that Recent transaction is there.

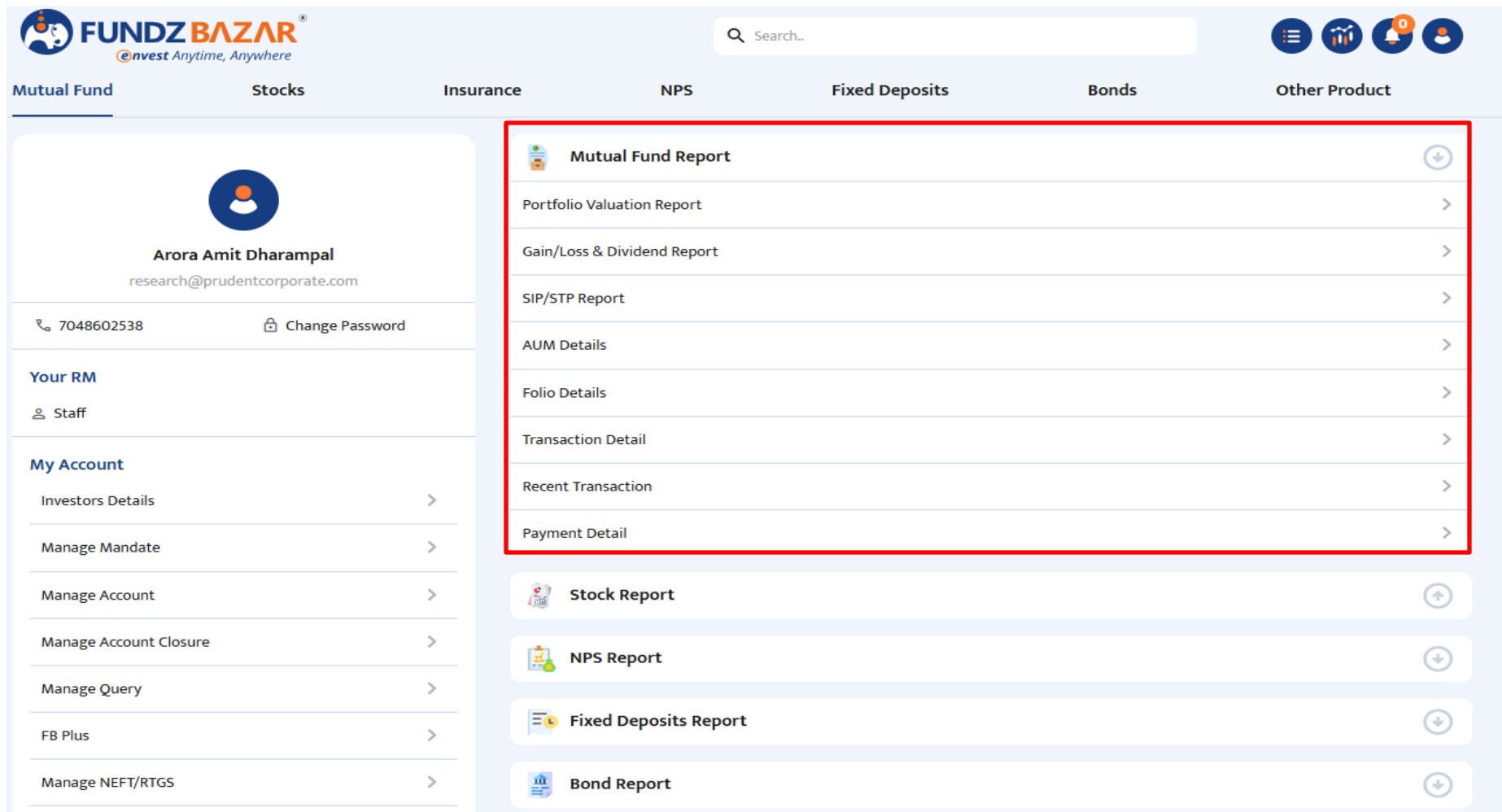
# Quick Access : All Reports

**All reports-** Use this feature to calculate the amount of investment required for your goal.



The screenshot displays the FUNDZ BAZAR user interface. On the left, a 'Quick Access' sidebar lists several features: 'Recent Transaction', 'All Reports' (highlighted with a red border), 'Risk Profiling', 'Goal', 'Calculator', and 'Watchlist'. The main content area shows the user's profile for 'Arora Amit Dharampal' with a 'Change Password' link. Below the profile are sections for 'Your RM' (Staff) and 'My Account' (Investors Details, Manage Mandate, Manage Account, Manage Account Closure, Manage Query, FB Plus, Manage NEFT/RTGS, Online KYC Modification Request). On the right, a vertical list of report types is available: Mutual Fund Report, Stock Report, NPS Report, Fixed Deposits Report, Bond Report, Other Product Report, and Insurance. Each report type has a dropdown arrow icon.

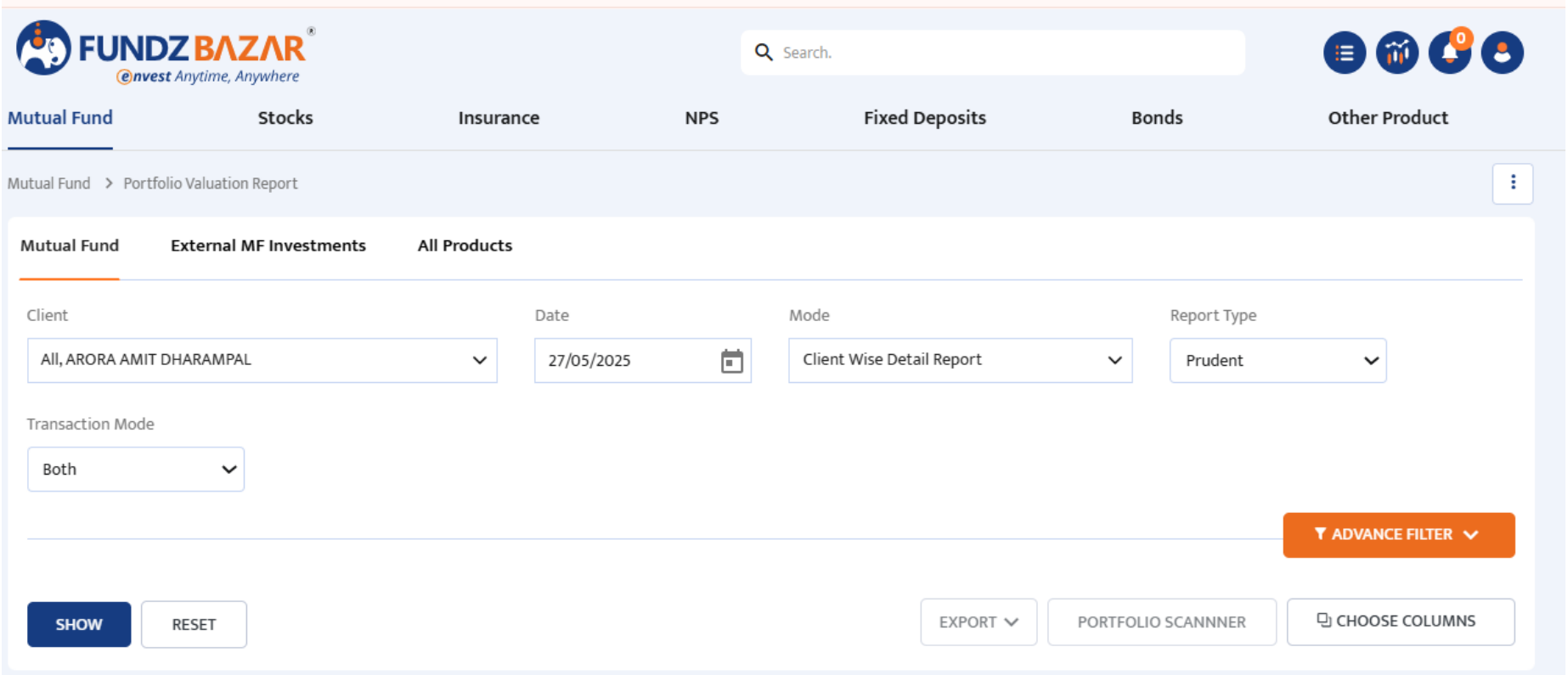
**Reports-** Here you can access all the valuation reports, payment and transaction reports, gain/loss reports, and portfolio-related reports.



The screenshot displays the user dashboard for Arora Amit Dharampal. The top navigation bar includes the Fundz Bazar logo, a search bar, and icons for menu, home, notifications, and profile. The main navigation tabs are Mutual Fund, Stocks, Insurance, NPS, Fixed Deposits, Bonds, and Other Product. The left sidebar contains user profile information, contact details, and account management options. The main content area lists various reports, with the Mutual Fund Report section highlighted by a red border.

Report Category	Report Name	Action
Mutual Fund Report	Portfolio Valuation Report	>
	Gain/Loss & Dividend Report	>
	SIP/STP Report	>
	AUM Details	>
	Folio Details	>
	Transaction Detail	>
	Recent Transaction	>
	Payment Detail	>
Stock Report	⬇	
NPS Report	⬇	
Fixed Deposits Report	⬇	
Bond Report	⬇	

**Valuation Report-** Portfolio valuation report allows client to consolidate multiple investors and view the entire family portfolio on a single desk and can download the same.



The screenshot displays the 'Portfolio Valuation Report' interface on the Fundz Bazar platform. At the top, the navigation bar includes the Fundz Bazar logo, a search bar, and icons for menu, analytics, notifications, and user profile. Below this, a horizontal menu lists various product categories: Mutual Fund, Stocks, Insurance, NPS, Fixed Deposits, Bonds, and Other Product. The 'Mutual Fund' category is currently selected.

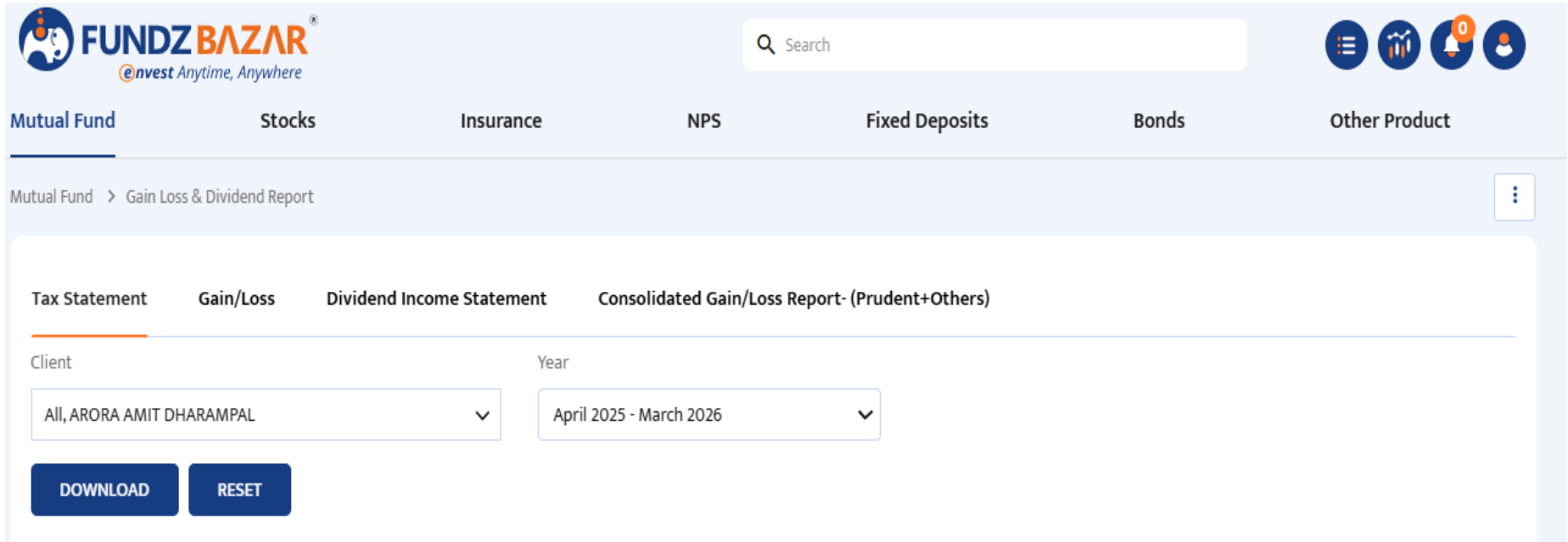
The main content area shows the breadcrumb 'Mutual Fund > Portfolio Valuation Report' and a vertical menu with three options: Mutual Fund, External MF Investments, and All Products. The 'Mutual Fund' option is active.

The filter section contains the following fields:

- Client:** A dropdown menu with the selected value 'All, ARORA AMIT DHARAMPAL'.
- Date:** A date input field showing '27/05/2025' with a calendar icon.
- Mode:** A dropdown menu with the selected value 'Client Wise Detail Report'.
- Report Type:** A dropdown menu with the selected value 'Prudent'.
- Transaction Mode:** A dropdown menu with the selected value 'Both'.


At the bottom right, there is an orange button labeled 'ADVANCE FILTER'. At the bottom left, there are 'SHOW' and 'RESET' buttons. At the bottom right, there are three buttons: 'EXPORT', 'PORTFOLIO SCANNER', and 'CHOOSE COLUMNS'.

**Gain/Loss report-** Provides details of Short Term and Long Term Capital Gain/Loss with and without indexation for each financial year



The screenshot shows the Fundz Bazar web application interface. At the top left is the logo and tagline "FUNDZ BAZAR envest Anytime, Anywhere". A search bar is located at the top center. On the top right, there are four circular icons: a menu icon, a bar chart icon, a notification bell icon with a red '0', and a user profile icon. Below the header is a navigation menu with tabs for "Mutual Fund", "Stocks", "Insurance", "NPS", "Fixed Deposits", "Bonds", and "Other Product". The "Mutual Fund" tab is selected. Below the navigation menu, the breadcrumb "Mutual Fund > Gain Loss & Dividend Report" is visible. A vertical menu icon is on the right side. The main content area has four tabs: "Tax Statement", "Gain/Loss", "Dividend Income Statement", and "Consolidated Gain/Loss Report- (Prudent+Others)". The "Gain/Loss" tab is selected. Below the tabs, there are two dropdown menus: "Client" with the value "All, ARORA AMIT DHARAMPAL" and "Year" with the value "April 2025 - March 2026". At the bottom, there are two buttons: "DOWNLOAD" and "RESET".

**SIP/STP Report-** This shows details with regard to Registration of SIP/STP, Completed installments and upcoming installments.



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[Mutual Fund](#) | [Stocks](#) | [Insurance](#) | [NPS](#) | [Fixed Deposits](#) | [Bonds](#) | [Other Product](#)

Mutual Fund > SIP / STP Report

Account Name: All, ARORA AMIT DHARAMPAL

Date From: 28/02/2025

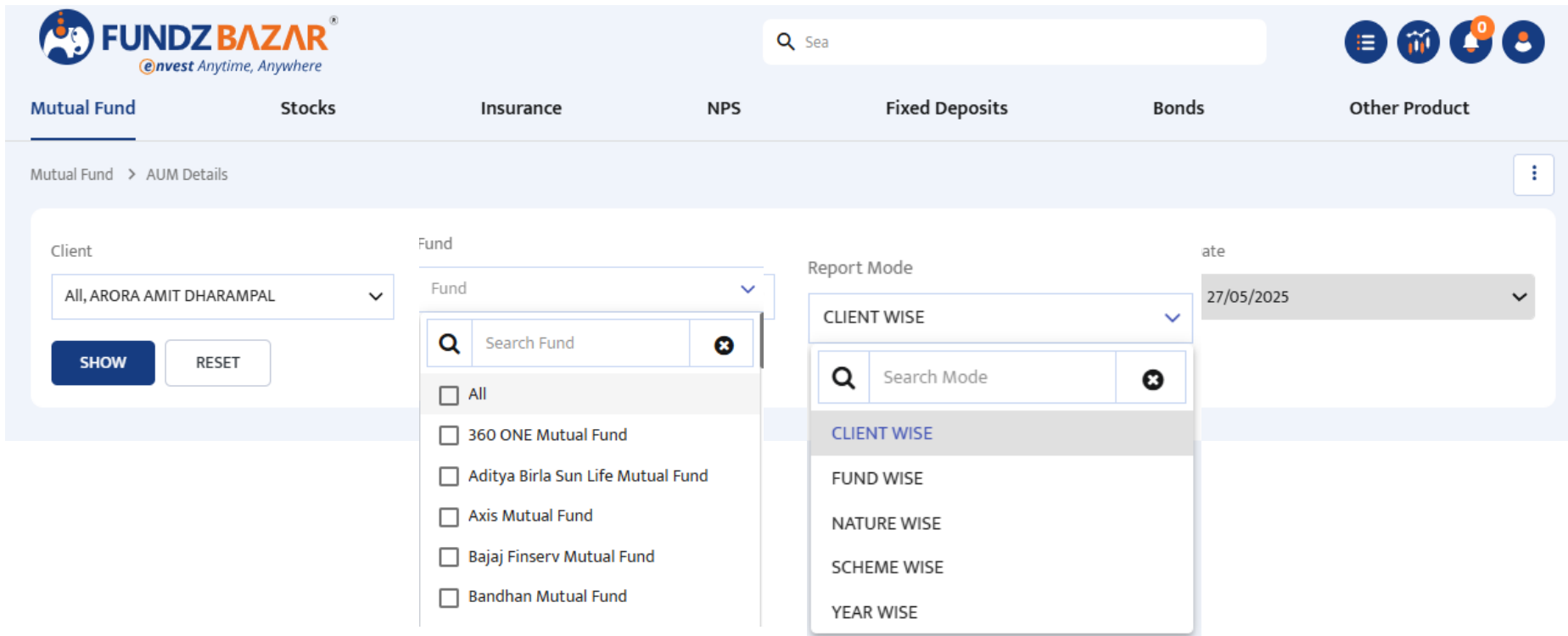
Date To: 28/05/2025

Plan Type: Online SIP

Report Mode: Registered

**SHOW** | RESET

**AUM Report-** This provides details of Assets Under Management (AUM) categorized by Fund, Client, Nature, and Scheme.








The screenshot shows the FUNDZ BAZAR web application interface for generating an AUM Report. The top navigation bar includes the logo, a search bar, and icons for menu, dashboard, notifications, and profile. Below the navigation bar, there are tabs for Mutual Fund, Stocks, Insurance, NPS, Fixed Deposits, Bonds, and Other Product. The main content area is titled "Mutual Fund > AUM Details".

The interface features several filters and controls:

- Client:** A dropdown menu showing "All, ARORA AMIT DHARAMPAL" with a "SHOW" button and a "RESET" button.
- Fund:** A dropdown menu with a search bar "Search Fund" and a list of funds: All, 360 ONE Mutual Fund, Aditya Birla Sun Life Mutual Fund, Axis Mutual Fund, Bajaj Finserv Mutual Fund, and Bandhan Mutual Fund.
- Report Mode:** A dropdown menu showing "CLIENT WISE" with a search bar "Search Mode" and a list of modes: CLIENT WISE, FUND WISE, NATURE WISE, SCHEME WISE, and YEAR WISE.
- Date:** A dropdown menu showing "27/05/2025".

**Folio Static report-** A folio static report is a document that provides a comprehensive overview of an investment folio.




Mutual Fund
Stocks
Insurance
NPS
Fixed Deposits
Bonds
Other Product

Mutual Fund > Folio Detail ⋮

Client

Status

SHOW
RESET

**Folio Static Report** EXCEL  Total Record(s): 55

Items per page:  1 - 5 of 55 < >

Investor Name	Investor Name As Per PAN	AMC Name	Nature	Grouped Sub Nature	Sub Nature	Short Name
ARORA AMIT DHARAMPAL		360 ONE Asset Management Limited	Equity	ELSS	ELSS	360 ONE ELSS Tax Saver Nifty 50 Inde
ARORA AMIT DHARAMPAL	AMIT DHARAMPAL ARORA	Aditya Birla Sun Life AMC Limited	Hybrid	Balanced	Dynamic Asset Allocation	Aditya Birla Sun Life Balanced Advant
ARORA AMIT DHARAMPAL	AMIT DHARAMPAL ARORA	Aditya Birla Sun Life AMC Limited	Equity	Equity	Flexi Cap	Aditya Birla SL Flexi Cap Fund
ARORA AMIT DHARAMPAL	AMIT DHARAMPAL ARORA	Aditya Birla Sun Life AMC Limited	Equity	Equity	Small Cap	Aditya Birla Sun Life Small Cap Fund
ARORA AMIT DHARAMPAL	AMIT DHARAMPAL ARORA	Axis Asset Management Company Ltd.	Equity	Equity	Large Cap	Axis Bluechip Fund

**Transaction Detail-** This shows detail with regard to total number of transactions done on FundzBazar for the selected period.



Mutual Fund   Stocks   Insurance   NPS   Fixed Deposits   Bonds   Other Product

Mutual Fund > Transaction Detail

Client	Date From	Date To
All, ARORA AMIT DHARAMPAL	28/02/2025	28/05/2025

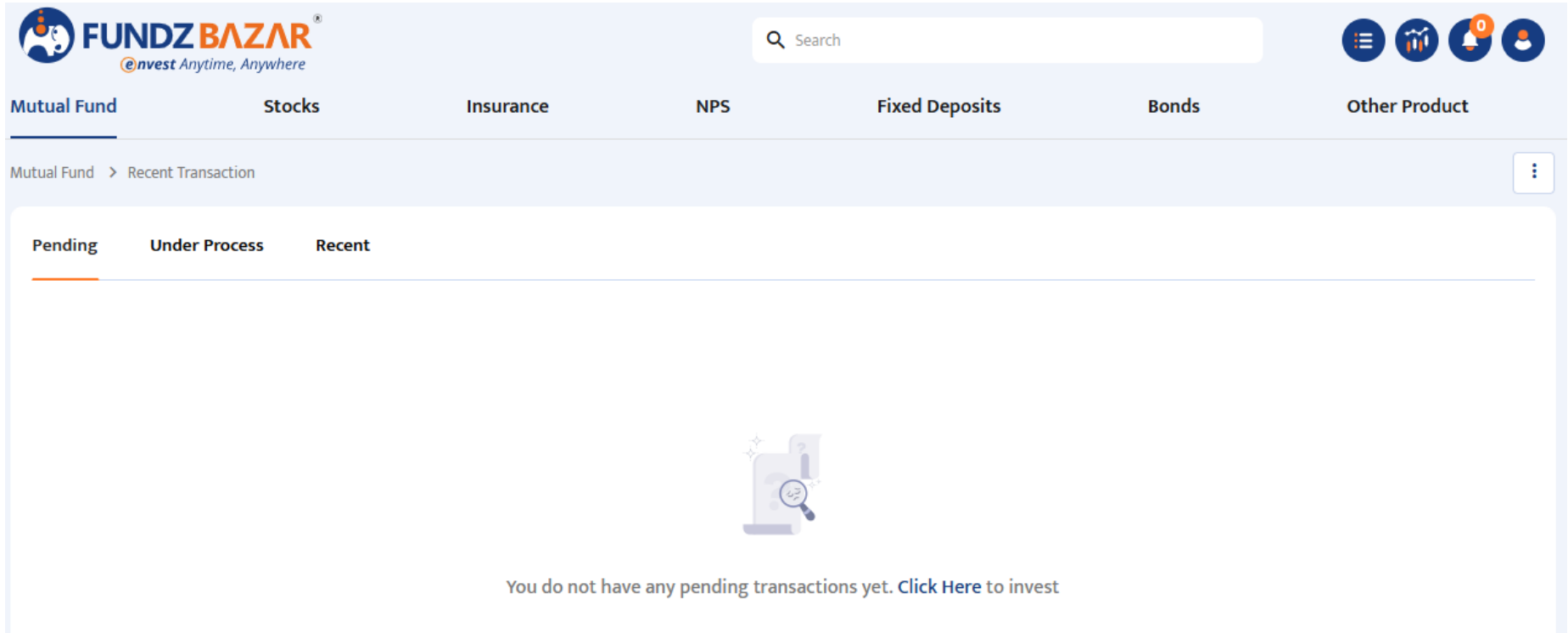
ADVANCE FILTER

Fund	Nature	Sub Nature	Transaction Type
Fund	Nature	Sub Nature	Transaction Type Without Revertal

Folio	Get Folio	Schemes	Get Scheme	Amount
Folio		Schemes		<

SHOW   RESET

**Recent Transaction-** This shows detail with regard to recent transactions.



**FUNDZ BAZAR**  
einvest Anytime, Anywhere

Search


Mutual Fund   Stocks   Insurance   NPS   Fixed Deposits   Bonds   Other Product

Mutual Fund > Recent Transaction

Pending   Under Process   Recent

You do not have any pending transactions yet. [Click Here](#) to invest

**Payment Detail-** Provides information with regard to payments made or attempted to make using Net banking or with registered mandate



einvest Anytime, Anywhere

Mutual Fund    Stocks    Insurance    NPS    Fixed Deposits    Bonds    Other Product

Mutual Fund > Payment Detail

Account Name: All, ARORA AMIT DHARAMPAL

Start Date: 28/04/2025

End Date: 28/05/2025

**ADVANCE FILTER**

PAN: \_\_\_\_\_

Reference No: Reference No

Transaction Status: All, Success, Failed, Pending

All    Net Banking    Nach Mandate    NEFT

**SHOW**   **RESET**

**All Reports-** Additionally to Mutual fund reports, there are many Stocks, NPS, Fixed Deposit, Bond, Insurance and Other products report available for our investors.



## Stock Report

Ledger Report

Current Holding Report

Bill Details Report

Valuation Report

Gain/Loss Report

Trade Details Report

Trade Summary Report

DP Transactions Report

Demat Ledger Report

Position Report

RMS Report

Rms Policy

Research Report

Approved Scripts

Expense Report

Dividend Income Report

Research Call Tracker Report

Position All Report

MTF Margin Summary

MTF Collateral Scrip

MTF Funded Scrip Detail

MTF Purchase Report

MTF Release Report



## NPS Report

NPS Transaction

**NPS Valuation**

NPS Gain/Loss

NPS Transaction Charge



## Fixed Deposits Report

FD Transaction Report



## Bond Report

Bond Transaction Report

Bond Holding Report

Bond Portfolio Scanner



## Other Product Report

**Loan Against MF/Stocks**

PMS/AIF Transaction Report

P2P Summary Report

P2P Ledger Report

Unlisted Equity Transaction Report

P2P Maturity Report

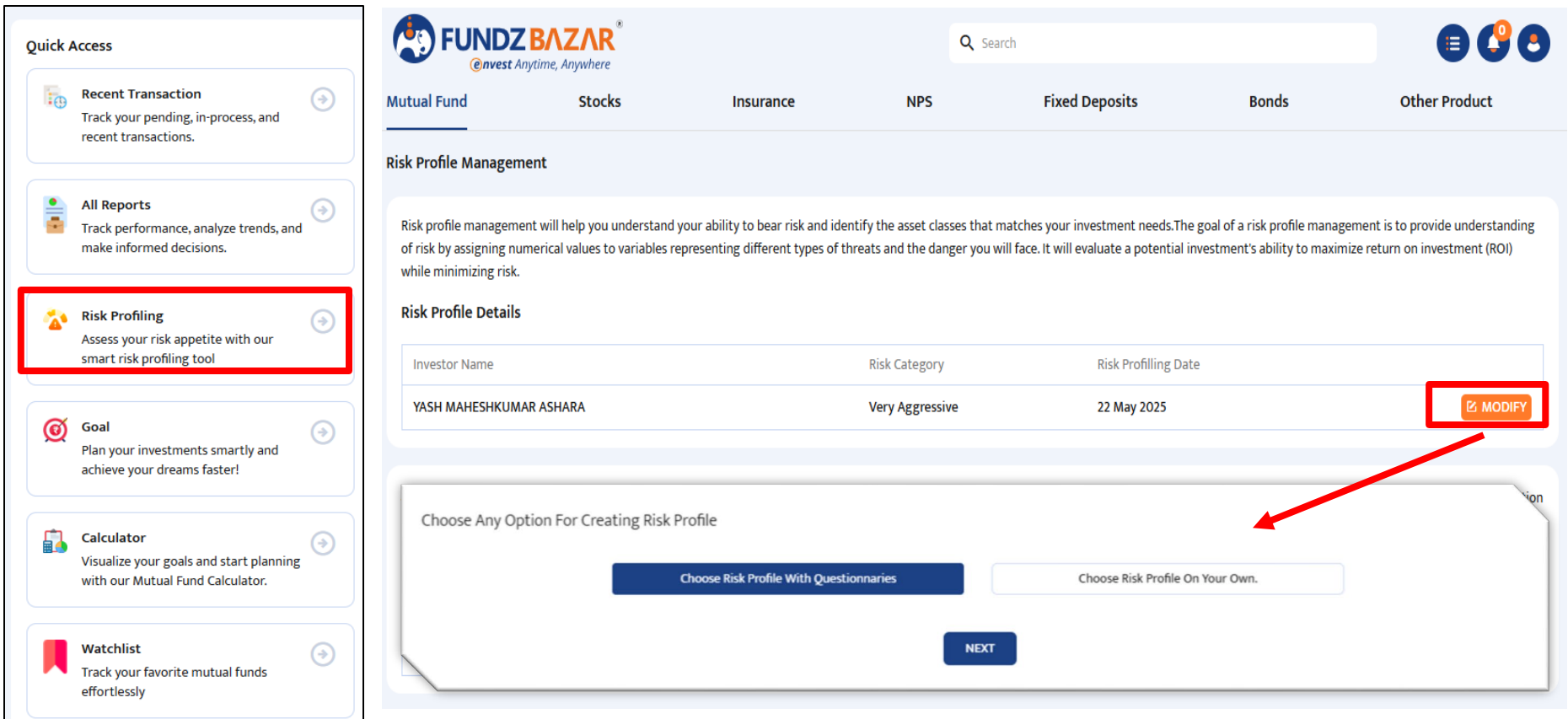
Gold Accumulation Report



## Insurance

Insurance Holding Report

**Risk Profiling-** This will help you understand your ability to bear risk and identify the asset classes that matches your investment needs.



**Quick Access**

- Recent Transaction
- All Reports
- Risk Profiling**
- Goal
- Calculator
- Watchlist

**FUNDZ BAZAR**  
invest Anytime, Anywhere

Mutual Fund   Stocks   Insurance   NPS   Fixed Deposits   Bonds   Other Product

**Risk Profile Management**

Risk profile management will help you understand your ability to bear risk and identify the asset classes that matches your investment needs. The goal of a risk profile management is to provide understanding of risk by assigning numerical values to variables representing different types of threats and the danger you will face. It will evaluate a potential investment's ability to maximize return on investment (ROI) while minimizing risk.

**Risk Profile Details**

Investor Name	Risk Category	Risk Profiling Date	
YASH MAHESHKUMAR ASHARA	Very Aggressive	22 May 2025	<b>MODIFY</b>

Choose Any Option For Creating Risk Profile

Choose Risk Profile With Questionnaires   Choose Risk Profile On Your Own.

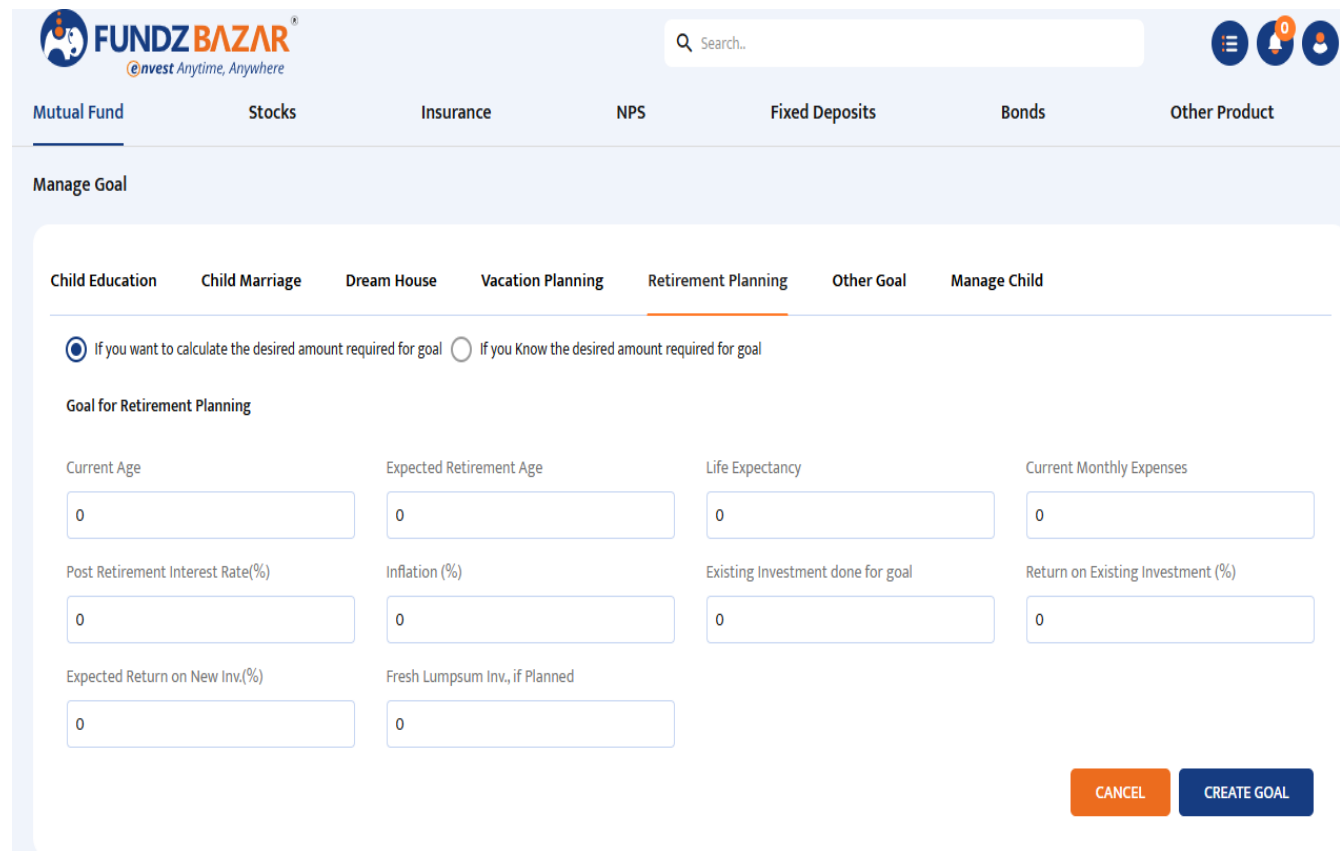
**NEXT**

There are two options to do risk profiling. One is to answer the questions to ideal asset allocation and second is to choose risk profile on your own.

**Goal-** This feature identifies investments required to achieve goals, assign existing and new investments to goals and review the progress towards goal achievement.

Quick Access

- Recent Transaction**  
Track your pending, in-process, and recent transactions.
- All Reports**  
Track performance, analyze trends, and make informed decisions.
- Risk Profiling**  
Assess your risk appetite with our smart risk profiling tool
- Goal**  
Plan your investments smartly and achieve your dreams faster!
- Calculator**  
Visualize your goals and start planning with our Mutual Fund Calculator.
- Watchlist**  
Track your favorite mutual funds effortlessly



The screenshot shows the 'Manage Goal' section of the FUNDZ BAZAR application. At the top, there is a search bar and navigation tabs for Mutual Fund, Stocks, Insurance, NPS, Fixed Deposits, Bonds, and Other Product. Below this, the 'Manage Goal' section is active, with sub-tabs for Child Education, Child Marriage, Dream House, Vacation Planning, Retirement Planning, Other Goal, and Manage Child. The 'Retirement Planning' sub-tab is selected. It features two radio buttons: 'If you want to calculate the desired amount required for goal' (selected) and 'If you know the desired amount required for goal'. Below this, the 'Goal for Retirement Planning' form includes input fields for Current Age, Expected Retirement Age, Life Expectancy, Current Monthly Expenses, Post Retirement Interest Rate(%), Inflation(%), Existing Investment done for goal, Return on Existing Investment (%), Expected Return on New Inv.(%), and Fresh Lumpsum Inv., if Planned. At the bottom right, there are 'CANCEL' and 'CREATE GOAL' buttons.

You can create goal for Child education, Child Marriage, Dream house, Vacation Planning, Retirement Planning and Any other goal.

# Quick Access : Use Calculator to plan your goal

**Calculator-** Use this feature to calculate the amount of investment required for your goal.

## Quick Access



### Recent Transaction

Track your pending, in-process, and recent transactions.



### All Reports

Track performance, analyze trends, and make informed decisions.



### Risk Profiling

Assess your risk appetite with our smart risk profiling tool



### Goal

Plan your investments smartly and achieve your dreams faster!



### Calculator

Visualize your goals and start planning with our Mutual Fund Calculator.



### Watchlist

Track your favorite mutual funds effortlessly

Total Corpus Required **₹ 19,67,151** — Your Current Investment will grow to **₹ 0** = You need to plan more for **₹ 19,67,152**

To Achieve this You need to start Investing **₹ 8,781** Every month for **10** Years

Years to Goal



10

Education Cost Today (Rs)



1000000

Assumed Inflation (%)



7

Existing Inv Linked (Rs)



0

Return on Existing Inv (%)



10

Return on New Inv (%)



12

Planned Lumpsum Inv (Rs)



0

CHILD EDUCATION

CHILD MARRIAGE

RETIREMENT PLAN

SIP WEALTH CREATION

SIP STEP UP

DREAM VACATION

DREAM HOUSE

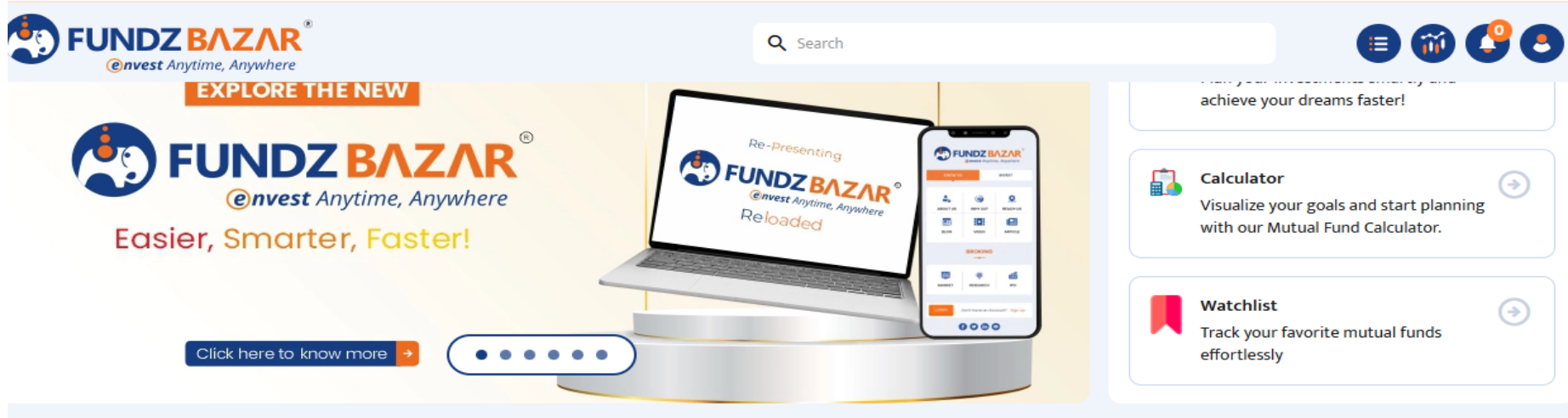
Why wait? Act now and build corpus for your Child's Education

SEND MAIL

START INVESTING NOW

# Research : Analyze funds with these features

View all the Fund and Industry related research reports using this section



**FUNDZ BAZAR**  
@invest Anytime, Anywhere

**EXPLORE THE NEW**

**FUNDZ BAZAR**  
@invest Anytime, Anywhere  
Easier, Smarter, Faster!

Click here to know more →

Many of our investments already and achieve your dreams faster!

**Calculator**  
Visualize your goals and start planning with our Mutual Fund Calculator.

**Watchlist**  
Track your favorite mutual funds effortlessly

## Research



### Return Analyzer

Return Analyzer is a comparison tool where all types of 'Returns' can be generated for ...



### Industry Analyzer

Industry analysis use to analyze the degree of competition in a certain industry



### Debt Fundz Analyser

Debt Fundz Analyser use to compare schemes which have in invested money in debt instruments.



### Fundz Performance

The Top Fundz is the list of schemes which are most investment worthy...



### New Fundz Offer

Here are the current and upcoming New Fund Offerings (NFOs) from various asset...



### Fundz Analyzer

Fund Analyzer helps to sort through and compare various mutual funds

**Return Analyzer-** Return Analyzer is a comparison tool where all types of 'Returns' can be generated for all the mutual fund schemes along with a chart.



Search.



## RETURN ANALYZER

Return Analyzer is a comparison tool where all types of 'Returns' can be generated for all the mutual fund schemes along with a chart. There are various types of 'Returns' available which can be used for analyzing the schemes- Normal Returns (Point-to-point), Rolling Returns (used to check the consistency), SIP Returns (used for investments done on regular basis), Return comparison of the Peers (funds belonging to the same category) and lastly Customize Return which can be generated for any time periods, between any dates and for any intervals. Modules where charts are provided, comparison upto 5 schemes are allowed.

This is a one-of-its-kind tool developed by FundzBazar where all the types of 'Returns' are available at a single place.



### Return Comparison

Compare up to 5 schemes and analyze their performance on a single graph for any selected period.

[Take a Look →](#)



### Rolling Return

Rolling return is one of the best criteria to check the consistency of performance of any fund. Here you can check the rolling return for various periods upto 5 years.

[Take a Look →](#)



### SIP Scheme Comparison

Compare SIP performance of upto 5 schemes for the desired time period.

[Take a Look →](#)



### Peer Comparison

Compare the return generated by fund relative to peer group funds.

[Take a Look →](#)



### SIP Watch

Check and compare the SIP performance of Suggested mutual fund schemes updated fortnightly.

[Take a Look →](#)



### Customize Return

Compare the scheme performance across multiple time horizons, intervals and on Rolling basis!

[Take a look →](#)

# Research : Analyze funds with these features

**Fund Performance-** You can view funds by AMC (Asset Management Company), nature, and sub-nature. Additionally, the returns of FundzBazar shortlisted funds can also be accessed.

## FUNDZ PERFORMANCE

The Top Fundz is the list of schemes which are most investment worthy among the peer groups. The listing of the selected mutual fund schemes in each category is based on our strong internal research. We analyze the schemes on various quantitative measures and also do required qualitative assessment to ensure that the scheme listing is unbiased. Different Time and different criteria are used for Debt and Equity funds. However, these funds have a proven track record of beating their benchmarks while keeping with their investment mandates, do note that the past performance is not a guarantee of future results. Kindly choose the schemes which suits most to your needs.

### FundzBazar Suggested funds

FundzBazar Suggested funds

Search Your Fund

Your WatchList

AMC

Please Select AMC

Nature

Equity

Sub Nature




Please Select SubNature

SEARCH

< Multi Cap Large & Mid Cap ELSS Mid Cap Dividend Yield Value Contra Focused Large Cap Sectoral Small Cap T >

PDF

Excel

Scheme Name	Corpus	Absolute Return (%)		Compounded Annualized Return (%)						Invest
		3 Month	6 Month	1 year	2 year	3 year	5 year	7 year	10 year	
Aditya Birla Sun Life Multi-Cap Fund - Regular Plan - Growth 	6,066.15	12.54	-2.77	5.69	21.06	18.8				
...	...	...	...	...	...	...				

# Research : Analyze funds with these features

**New Fundz offer-** Here are the current and upcoming New Fund Offerings (NFOs) from various asset management companies with their nature, sub-nature, minimum investment amounts including opening date and closing date

## NEW FUNDZ OFFER

Here are the current and upcoming New Fund Offerings (NFOs) from various asset management companies with their nature, sub-nature, minimum investment amounts including opening date and closing date. For close ended funds it also shows tenure and maturity date.

[View past FMP returns](#)

Ongoing NFOs / FMP

Upcoming NFOs / FMP

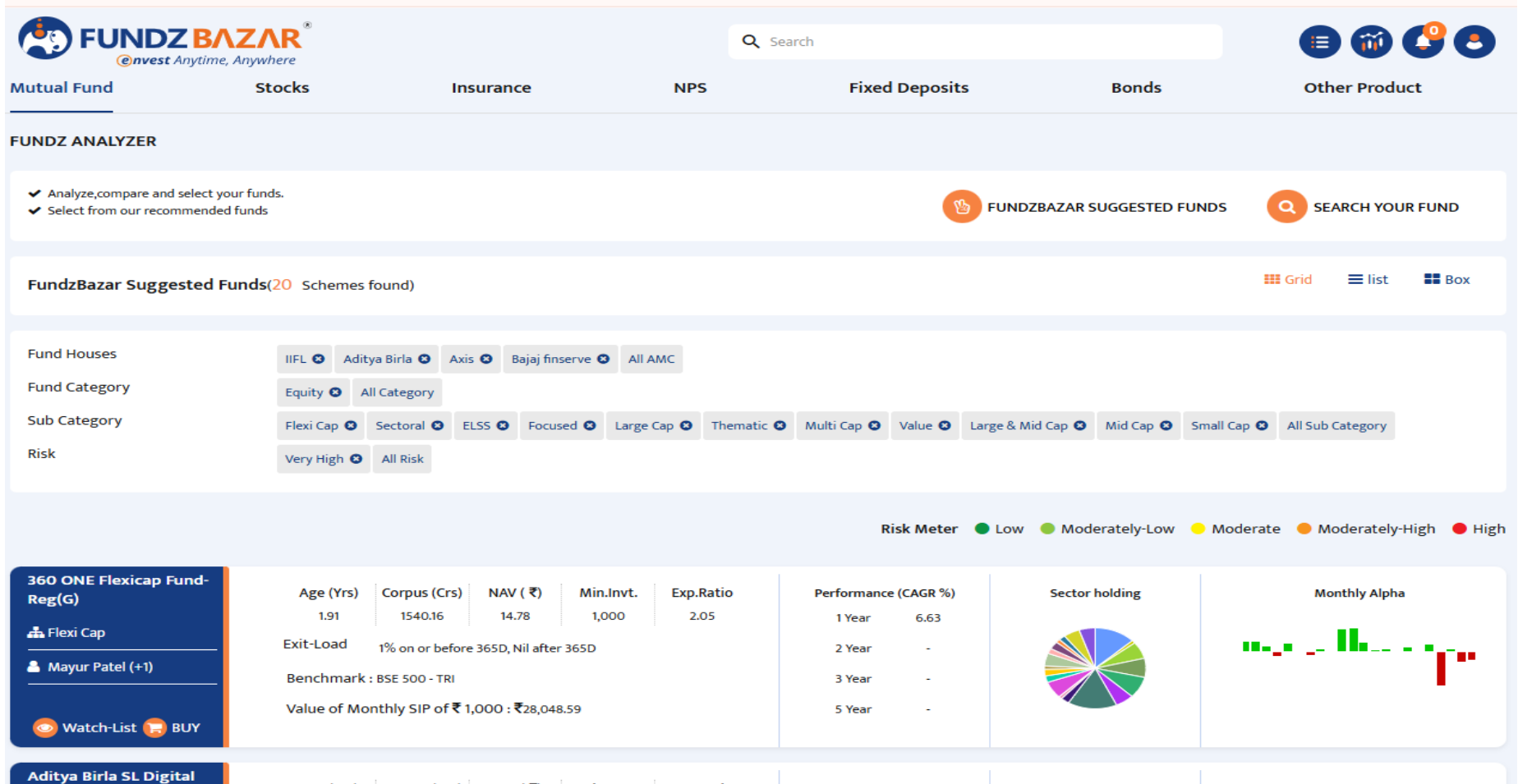
PDF

Excel



Invest	Fund name	Structure	Nature	Sub Nature	Min.Inv(Rs.)	Launch Date	Close Date	Tenure	Mat. Date
	Groww Nifty 500 Low Volatility 50 ETF	Open Ended	Equity	ETF	500	28 May 2025	11 Jun 2025		N/A
	ICICI Prudential Nifty200 Quality 30 Index Fund - Regular Plan - Growth	Open Ended	Equity	Index	1000	21 May 2025	04 Jun 2025		N/A
	Motilal Oswal Services Fund - Regular Plan - Growth	Open Ended	Equity	Sectoral	500	20 May 2025	03 Jun 2025		N/A
	Nippon India BSE Sensex Next 30 ETF	Open Ended	Equity	ETF	1000	21 May 2025	04 Jun 2025		N/A
	Nippon India BSE Sensex Next 30 Index Fund - Regular Plan - Growth	Open Ended	Equity	Index	1000	21 May 2025	04 Jun 2025		N/A

# Research : Analyze funds with these features

**Fundz Analyzer-** Analyze the funds on various parameters like Age of fund, corpus, expense ratio, exit load, sector wise holding, Monthly alpha, etc.



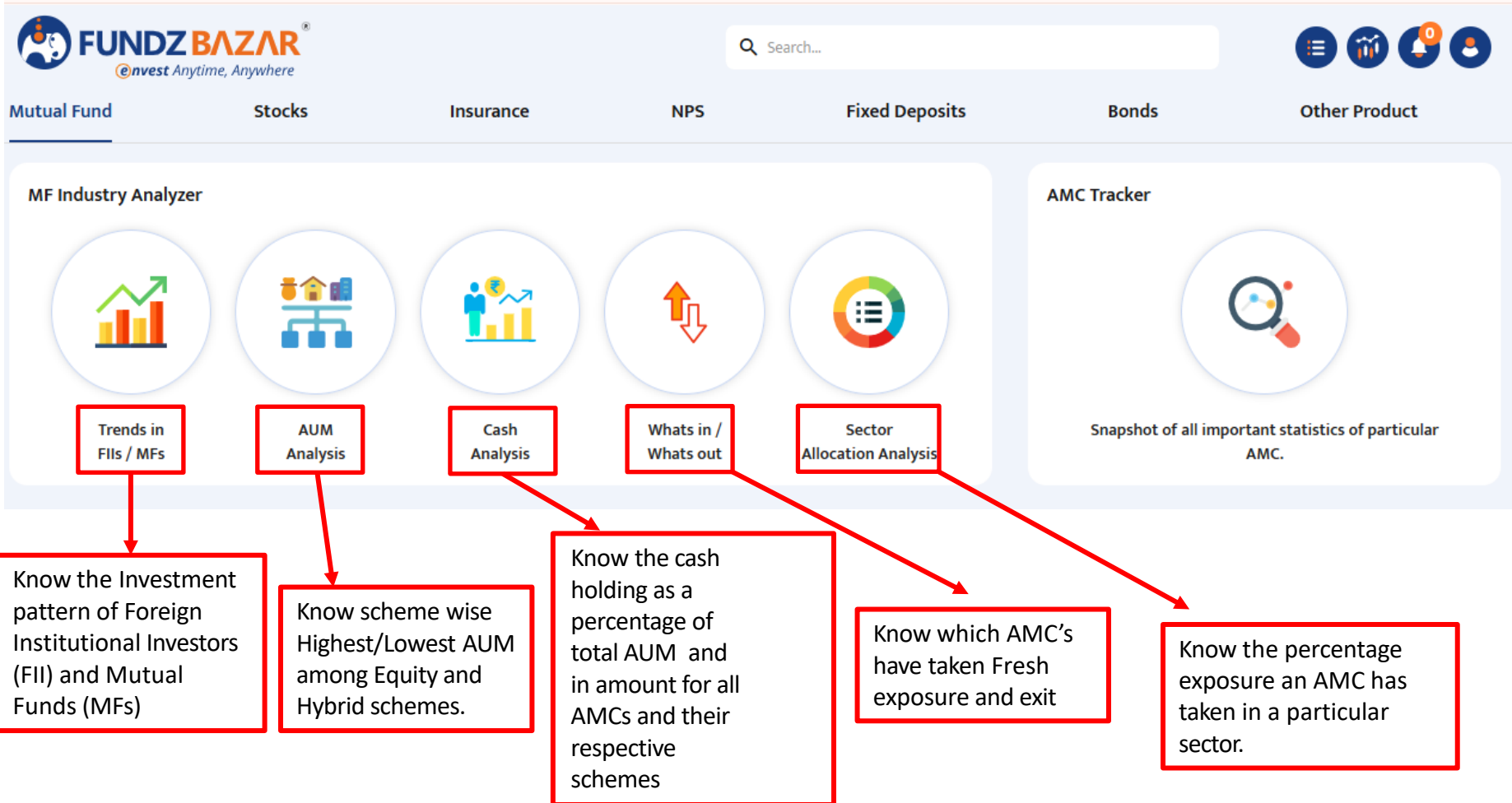
The screenshot shows the Fundz Analyzer interface. At the top, there's a navigation bar with categories: Mutual Fund, Stocks, Insurance, NPS, Fixed Deposits, Bonds, and Other Product. A search bar is present. Below the navigation, the 'FUNDZ ANALYZER' section includes a checklist for analyzing and selecting funds, and buttons for 'FUNDZBAZAR SUGGESTED FUNDS' and 'SEARCH YOUR FUND'. The main content area displays 'FundzBazar Suggested Funds (20 Schemes found)' with a view toggle (Grid, list, Box). Filter options are provided for Fund Houses (IIFL, Aditya Birla, Axis, Bajaj finserve, All AMC), Fund Category (Equity, All Category), Sub Category (Flexi Cap, Sectoral, ELSS, Focused, Large Cap, Thematic, Multi Cap, Value, Large & Mid Cap, Mid Cap, Small Cap, All Sub Category), and Risk (Very High, All Risk). A Risk Meter legend is shown below the filters. The main fund details for '360 ONE Flexicap Fund-Reg(G)' are displayed in a table-like format, including Age (1.91), Corpus (1540.16), NAV (14.78), Min.Invt. (1,000), Exp.Ratio (2.05), Performance (CAGR %), Sector holding (pie chart), and Monthly Alpha (bar chart).

Age (Yrs)	Corpus (Cr)	NAV ( ₹ )	Min.Invt.	Exp.Ratio	Performance (CAGR %)	Sector holding	Monthly Alpha
1.91	1540.16	14.78	1,000	2.05	1 Year: 6.63		
Exit-Load	1% on or before 365D, Nil after 365D				2 Year: -		
Benchmark	BSE 500 - TRI				3 Year: -		
Value of Monthly SIP of ₹ 1,000	₹28,048.59				5 Year: -		

Aditya Birla SL Digital

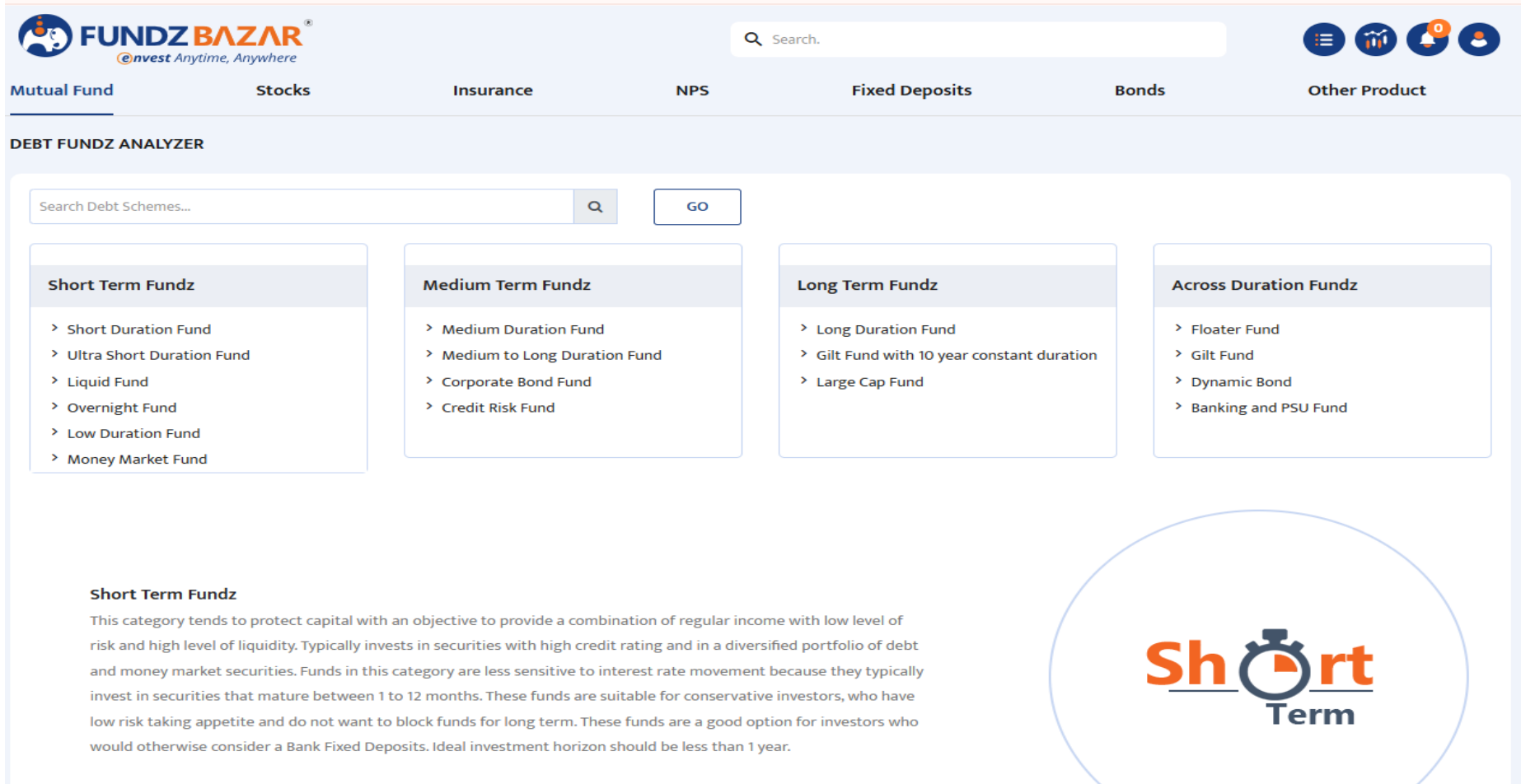
# Research : Analyze funds with these features

**MF Industry Analysis-** Analyze the Industry by knowing FII/MF's Trend, AUM Analysis, Cash Analysis, Whats in/ whats out and sector allocation analysis.



# Research : Analyze funds with these features

**Debt Fundz Analyzer-** Analyze the Debt funds on various parameters like Portfolio indicators, Asset class report, credit rating and sector allocation.



The screenshot shows the Fundz Bazar website interface. At the top, there is a navigation bar with the Fundz Bazar logo and tagline "invest Anytime, Anywhere". A search bar is located in the top right corner. Below the navigation bar, there are tabs for "Mutual Fund", "Stocks", "Insurance", "NPS", "Fixed Deposits", "Bonds", and "Other Product". The "Mutual Fund" tab is selected, and the "DEBT FUNDZ ANALYZER" section is active. This section features a search bar for "Search Debt Schemes..." and a "GO" button. Below the search bar, there are four main categories of debt funds: "Short Term Fundz", "Medium Term Fundz", "Long Term Fundz", and "Across Duration Fundz". Each category has a list of sub-fund types. The "Short Term Fundz" category is highlighted, and a detailed description of this category is provided below the list.

**Short Term Fundz**

- > Short Duration Fund
- > Ultra Short Duration Fund
- > Liquid Fund
- > Overnight Fund
- > Low Duration Fund
- > Money Market Fund

**Medium Term Fundz**

- > Medium Duration Fund
- > Medium to Long Duration Fund
- > Corporate Bond Fund
- > Credit Risk Fund

**Long Term Fundz**


- > Long Duration Fund
- > Gilt Fund with 10 year constant duration
- > Large Cap Fund

**Across Duration Fundz**

- > Floater Fund
- > Gilt Fund
- > Dynamic Bond
- > Banking and PSU Fund

**Short Term Fundz**

This category tends to protect capital with an objective to provide a combination of regular income with low level of risk and high level of liquidity. Typically invests in securities with high credit rating and in a diversified portfolio of debt and money market securities. Funds in this category are less sensitive to interest rate movement because they typically invest in securities that mature between 1 to 12 months. These funds are suitable for conservative investors, who have low risk taking appetite and do not want to block funds for long term. These funds are a good option for investors who would otherwise consider a Bank Fixed Deposits. Ideal investment horizon should be less than 1 year.





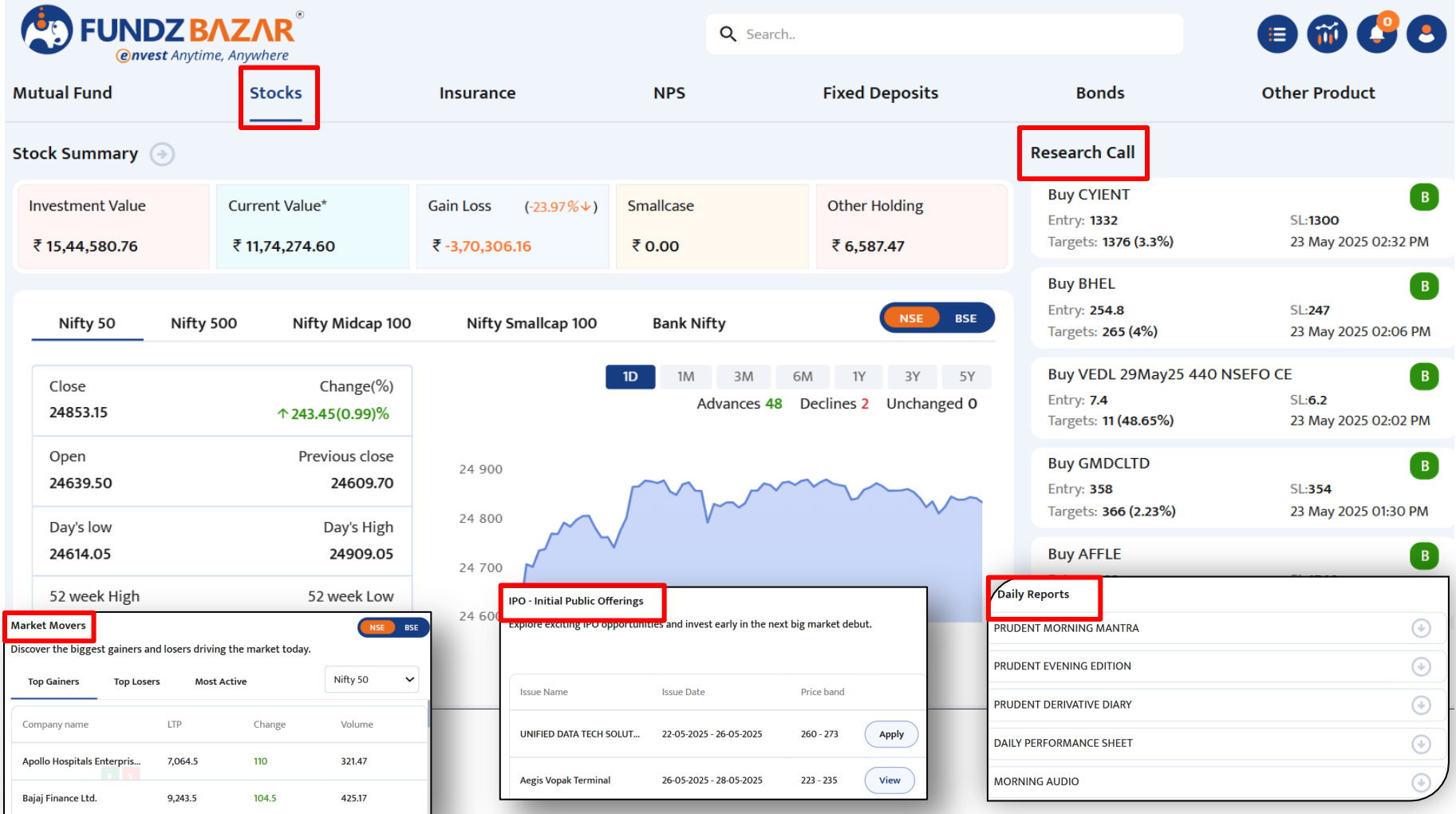
BRINGING YOU  
**THE THRILL OF ONLINE  
STOCK TRADING**



Now e-Trade in India's Popular Stocks Anytime, Anywhere and on the go !

# Stocks : Stocks summary, Research calls and many more...

Click on Stocks in homepage and scroll down to view portfolio, see research calls, daily reports, market movers, IPO, etc.



The screenshot shows the FUNDZ BAZAR website interface. The 'Stocks' menu item is highlighted in a red box. Below it, the 'Stock Summary' section displays investment value, current value, gain/loss, and other holdings. The 'Research Call' section is also highlighted, showing a list of buy recommendations for various stocks like CYIENT, BHEL, VEDL, GMDCLTD, and AFFLE. The 'Market Movers' section is highlighted, showing a table of top gainers and losers. The 'IPO - Initial Public Offerings' section is highlighted, showing a table of upcoming IPOs. The 'Daily Reports' section is highlighted, showing a list of reports like 'PRUDENT MORNING MANTRA' and 'DAILY PERFORMANCE SHEET'. A line chart for Nifty 50 is also visible, showing a positive change of 243.45 (0.99%).

**Stocks**

**Research Call**

**Market Movers**

**IPO - Initial Public Offerings**

**Daily Reports**

Investment Value	Current Value*	Gain Loss	Smallcase	Other Holding
₹ 15,44,580.76	₹ 11,74,274.60	₹ -3,70,306.16 (-23.97%↓)	₹ 0.00	₹ 6,587.47

**Stock Summary**

Nifty 50 | Nifty 500 | Nifty Midcap 100 | Nifty Smallcap 100 | Bank Nifty

Close: 24853.15 | Change(%): ↑ 243.45(0.99%)

Open: 24639.50 | Previous close: 24609.70

Day's low: 24614.05 | Day's High: 24909.05

52 week High: | 52 week Low: |

Advances 48 | Declines 2 | Unchanged 0

Issue Name	Issue Date	Price band
UNIFIED DATA TECH SOLUT...	22-05-2025 - 26-05-2025	260 - 273
Aegis Vopak Terminal	26-05-2025 - 28-05-2025	223 - 235

Company name	LTP	Change	Volume
Apollo Hospitals Enterpris...	7,064.5	110	321.47
Bajaj Finance Ltd.	9,243.5	104.5	425.17

PRUDENT MORNING MANTRA

PRUDENT EVENING EDITION

PRUDENT DERIVATIVE DIARY

DAILY PERFORMANCE SHEET

MORNING AUDIO

## *Get all your Insurance protection under one roof*



Health  
Insurance



Critical  
Illness



Personal  
Accident



Car  
Insurance



Two Wheeler  
Insurance



Travel  
Insurance

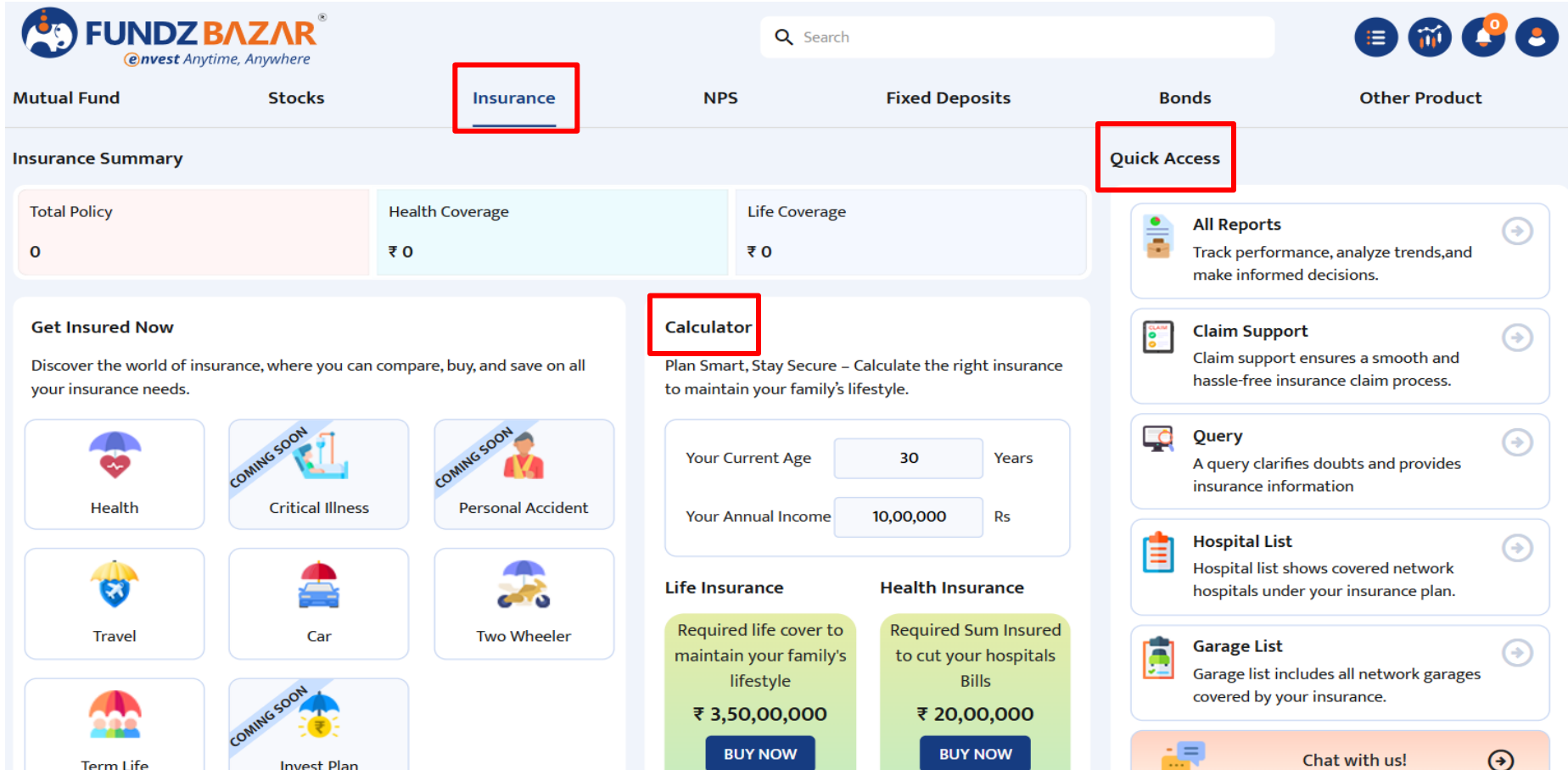


Term Life  
Insurance

- ✓ Compare and Buy Insurance online from anywhere; through our secured online platform.
- ✓ Get complete assistance for insurance claims or claim related queries from any company.
- ✓ Plan Smart, Stay Secure – Calculate the right insurance to maintain your family's lifestyle.

# Insurance : Insurance is now live on FundzBazar

Click on Insurance in homepage and scroll down to view Summary, reports, calculator, existing policies, etc.

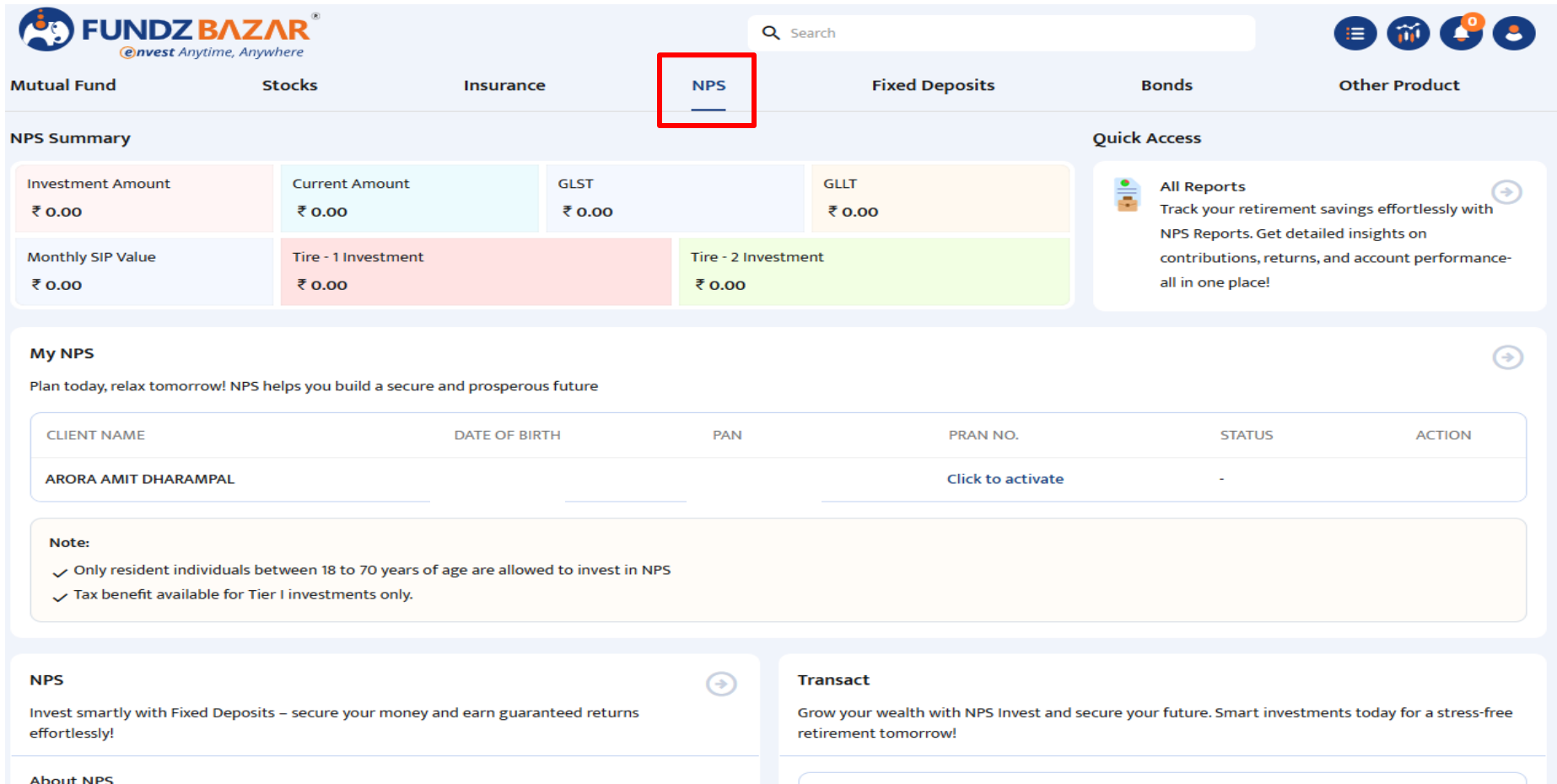


The screenshot shows the Fundz Bazar website's insurance section. At the top, the navigation bar includes 'Mutual Fund', 'Stocks', 'Insurance' (highlighted with a red box), 'NPS', 'Fixed Deposits', 'Bonds', and 'Other Product'. A search bar and user profile icons are also present. Below the navigation, the 'Insurance Summary' section displays 'Total Policy' as 0, 'Health Coverage' as ₹ 0, and 'Life Coverage' as ₹ 0. To the right, a 'Quick Access' sidebar (highlighted with a red box) contains links for 'All Reports', 'Claim Support', 'Query', 'Hospital List', and 'Garage List'. The main content area is divided into 'Get Insured Now' and 'Calculator'. 'Get Insured Now' features a grid of insurance types: Health, Critical Illness (marked 'COMING SOON'), Personal Accident (marked 'COMING SOON'), Travel, Car, Two Wheeler, Term Life, and Invest Plan (marked 'COMING SOON'). The 'Calculator' section (highlighted with a red box) is titled 'Plan Smart, Stay Secure – Calculate the right insurance to maintain your family's lifestyle.' It includes input fields for 'Your Current Age' (30 Years) and 'Your Annual Income' (10,00,000 Rs). Below this, it shows 'Required life cover to maintain your family's lifestyle' as ₹ 3,50,00,000 and 'Required Sum Insured to cut your hospitals Bills' as ₹ 20,00,000, each with a 'BUY NOW' button.

- ✓ NPS is regulated by PFRDA, with transparent investment norms, regular monitoring and performance review of fund managers by NPS Trust
- ✓ Subscriber will be allotted a unique Permanent Retirement Account Number (PRAN). Citizen of India between age of 18 to 70 years can invest in NPS
- ✓ Non residents Indians between the age of 18 – 60 years can also invest in NPS
- ✓ Minimum contribution – Rs.1000 per year in Tier I account.
- ✓ Additional deduction of up to 50,000 u/s 80 CCD(1B) over & above the deduction u/s 80C
- ✓ Tier I account is lock in account which can be withdrawn upon attaining superannuation or 60 years of age.
- ✓ On maturity, 60% of corpus amount can be withdrawn lump sum which is entirely tax free.
- ✓ Remaining 40% of corpus amount has to be kept for annuity
- ✓ Returns are market linked
- ✓ Portfolio is well diversified among Equity, Govt securities, Corporate Debt, FDs and Liquid Funds
- ✓ No tax benefit is available on Tier II account and there is no lock in, So you can withdraw funds anytime from Tier II.

# NPS : Invest in NPS using FundzBazar

Click on NPS and scroll down to view summary, information about NPS and many more.



The screenshot shows the FundzBazar website interface. At the top, there is a navigation bar with the FundzBazar logo and tagline "@invest Anytime, Anywhere". A search bar is located to the right of the logo. Below the search bar, there is a horizontal menu with categories: Mutual Fund, Stocks, Insurance, NPS (highlighted with a red box), Fixed Deposits, Bonds, and Other Product. To the right of the menu are four circular icons representing different services.

Below the navigation bar, the page is divided into two main sections: "NPS Summary" and "Quick Access".

**NPS Summary**

Investment Amount ₹ 0.00	Current Amount ₹ 0.00	GLST ₹ 0.00	GLLT ₹ 0.00
Monthly SIP Value ₹ 0.00	Tire - 1 Investment ₹ 0.00	Tire - 2 Investment ₹ 0.00	

**Quick Access**

**All Reports**  
Track your retirement savings effortlessly with NPS Reports. Get detailed insights on contributions, returns, and account performance - all in one place!

**My NPS**

Plan today, relax tomorrow! NPS helps you build a secure and prosperous future

CLIENT NAME	DATE OF BIRTH	PAN	PRAN NO.	STATUS	ACTION
ARORA AMIT DHARAMPAL					<a href="#">Click to activate</a>

**Note:**

- ✓ Only resident individuals between 18 to 70 years of age are allowed to invest in NPS
- ✓ Tax benefit available for Tier I investments only.

**NPS**

Invest smartly with Fixed Deposits – secure your money and earn guaranteed returns effortlessly!

**Transact**

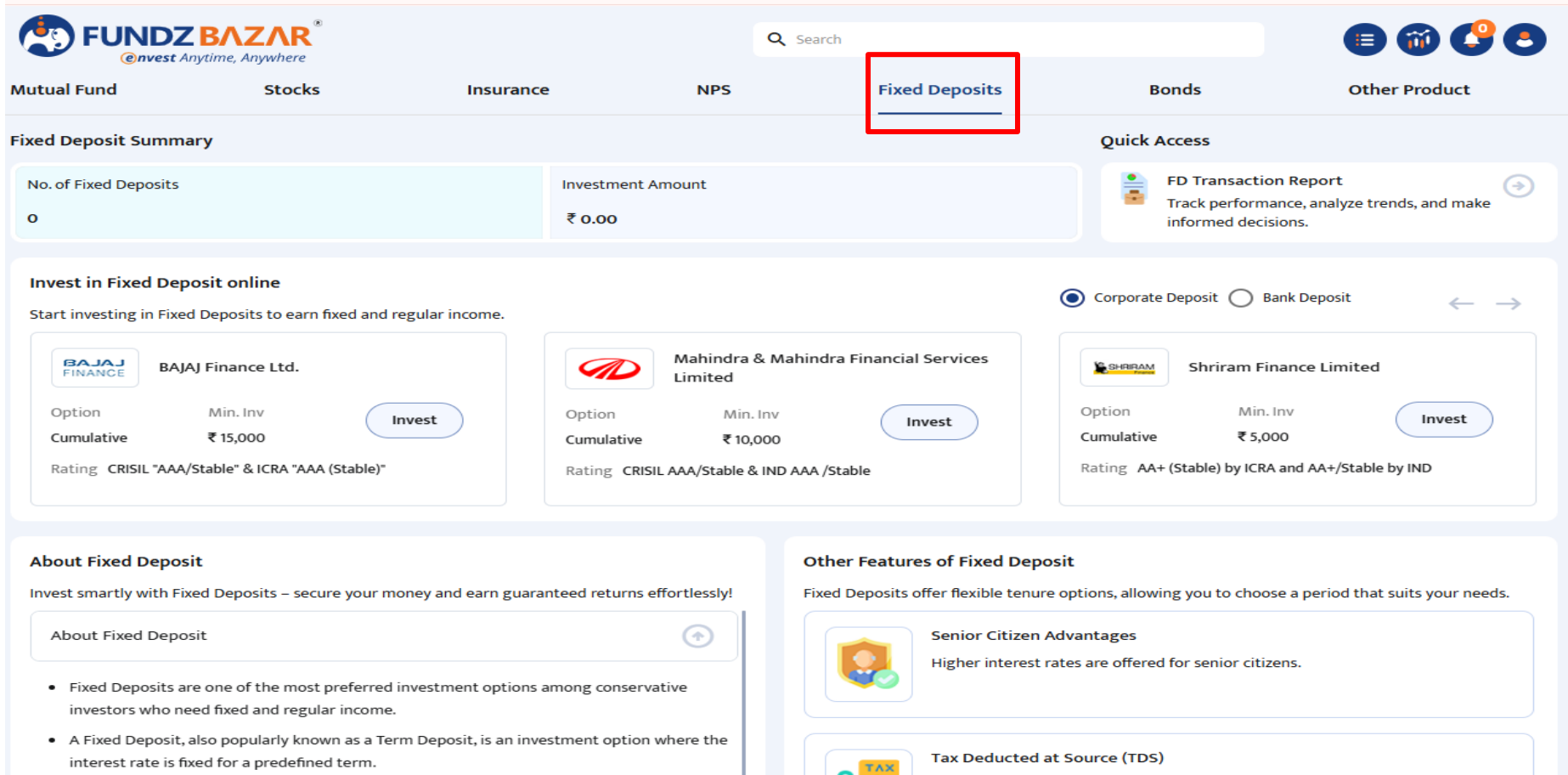
Grow your wealth with NPS Invest and secure your future. Smart investments today for a stress-free retirement tomorrow!

**About NPS**

- ✓ Fixed Deposit is one of the most preferred investment option among conservative investor who need fixed, assured and regular income.
- ✓ Fixed Deposit, also called Term Deposit is an investment option wherein interest rate is fixed for a predefined term.
- ✓ These deposits are accepted by Banks, manufacturing companies, financial institutions and non-banking finance companies. Deposits mobilized by companies are governed by the Companies Act under Section 58A whereas deposits mobilized by banks typically comes under the purview of **the Reserve Bank of India (RBI) Act, 1934** and the **Banking Regulation Act, 1949** in India.
- ✓ The maturities of fixed deposits can range from a few days to a few years. As per the need, one may opt for monthly, quarterly, half-yearly, yearly or cumulative interest option. The interest rate earned on fixed deposit is added to one's income and is taxed as per one's income tax slab. . In case of company Fixed Deposit, TDS will be deducted if the annual interest exceeds Rs.5000, whereas Banks deduct TDS when the interest exceeds Rs.50000.
- ✓ If investor doesn't want the TDS to be deducted, he/she needs to submit form15G/H. [Click here to download Form 15G OR Form 15H](#)

# Fixed Deposit : Invest in FD's using Fundzbazar

Click on Fixed deposit to invest and view summary of FD's.



The screenshot displays the Fundz Bazar website interface. At the top, the navigation menu includes Mutual Fund, Stocks, Insurance, NPS, **Fixed Deposits** (highlighted with a red box), Bonds, and Other Product. A search bar is located to the right of the navigation menu. Below the navigation, the 'Fixed Deposit Summary' section shows 0 No. of Fixed Deposits and an Investment Amount of ₹ 0.00. A 'Quick Access' section provides a link to the 'FD Transaction Report'. The 'Invest in Fixed Deposit online' section offers three investment options: BAJAJ Finance Ltd. (Cumulative, ₹ 15,000), Mahindra & Mahindra Financial Services Limited (Cumulative, ₹ 10,000), and Shriram Finance Limited (Cumulative, ₹ 5,000). Each option includes an 'Invest' button and a rating. The 'About Fixed Deposit' section explains that Fixed Deposits are a secure investment option for conservative investors. The 'Other Features of Fixed Deposit' section highlights 'Senior Citizen Advantages' (higher interest rates) and 'Tax Deducted at Source (TDS)'.

**FUNDZ BAZAR**  
@invest Anytime, Anywhere

Search

Mutual Fund Stocks Insurance NPS **Fixed Deposits** Bonds Other Product

**Fixed Deposit Summary**

No. of Fixed Deposits: 0

Investment Amount: ₹ 0.00

**Quick Access**

FD Transaction Report  
Track performance, analyze trends, and make informed decisions.

**Invest in Fixed Deposit online**

Start investing in Fixed Deposits to earn fixed and regular income.

Corporate Deposit  Bank Deposit

**BAJAJ FINANCE** BAJAJ Finance Ltd.

Option: Cumulative, Min. Inv: ₹ 15,000, Rating: CRISIL "AAA/Stable" & ICRA "AAA (Stable)"

**Mahindra & Mahindra Financial Services Limited**

Option: Cumulative, Min. Inv: ₹ 10,000, Rating: CRISIL AAA/Stable & IND AAA /Stable

**SHRIRAM** Shriram Finance Limited

Option: Cumulative, Min. Inv: ₹ 5,000, Rating: AA+ (Stable) by ICRA and AA+/Stable by IND

**About Fixed Deposit**

Invest smartly with Fixed Deposits – secure your money and earn guaranteed returns effortlessly!

About Fixed Deposit

- Fixed Deposits are one of the most preferred investment options among conservative investors who need fixed and regular income.
- A Fixed Deposit, also popularly known as a Term Deposit, is an investment option where the interest rate is fixed for a predefined term.

**Other Features of Fixed Deposit**

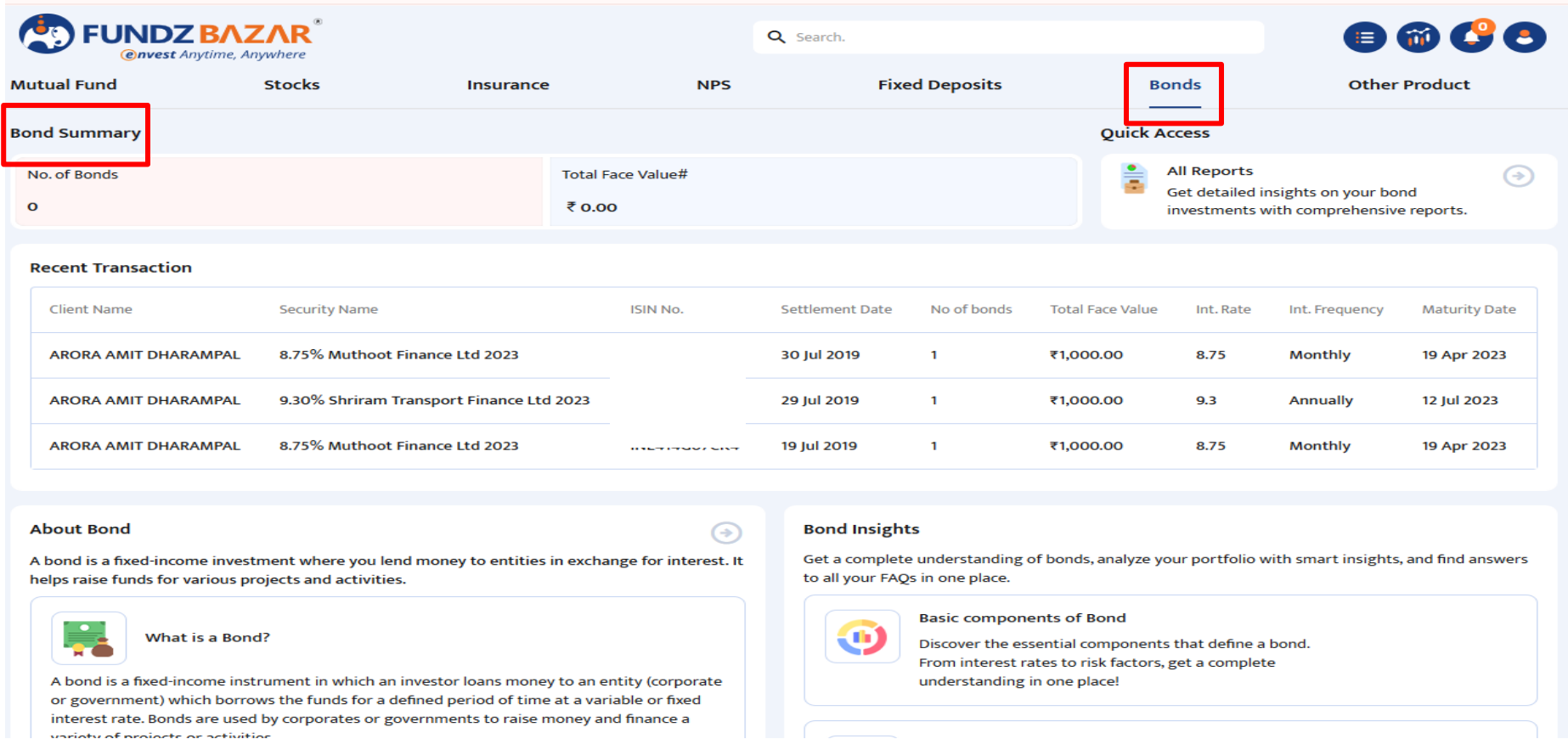
Fixed Deposits offer flexible tenure options, allowing you to choose a period that suits your needs.

**Senior Citizen Advantages**  
Higher interest rates are offered for senior citizens.

**Tax Deducted at Source (TDS)**

# Bonds : View Bond Summary

Click on Bonds to view summary and get information about concept of bonds.



**FUNDZ BAZAR**  
@invest Anytime, Anywhere

Search.

Mutual Fund   Stocks   Insurance   NPS   Fixed Deposits   **Bonds**   Other Product

**Bond Summary**

No. of Bonds: 0   Total Face Value#: ₹ 0.00

**Quick Access**

All Reports  
Get detailed insights on your bond investments with comprehensive reports.

**Recent Transaction**

Client Name	Security Name	ISIN No.	Settlement Date	No of bonds	Total Face Value	Int. Rate	Int. Frequency	Maturity Date
ARORA AMIT DHARAMPAL	8.75% Muthoot Finance Ltd 2023		30 Jul 2019	1	₹1,000.00	8.75	Monthly	19 Apr 2023
ARORA AMIT DHARAMPAL	9.30% Shriram Transport Finance Ltd 2023		29 Jul 2019	1	₹1,000.00	9.3	Annually	12 Jul 2023
ARORA AMIT DHARAMPAL	8.75% Muthoot Finance Ltd 2023		19 Jul 2019	1	₹1,000.00	8.75	Monthly	19 Apr 2023

**About Bond**

A bond is a fixed-income investment where you lend money to entities in exchange for interest. It helps raise funds for various projects and activities.

**What is a Bond?**

A bond is a fixed-income instrument in which an investor loans money to an entity (corporate or government) which borrows the funds for a defined period of time at a variable or fixed interest rate. Bonds are used by corporates or governments to raise money and finance a variety of projects or activities.

**Bond Insights**

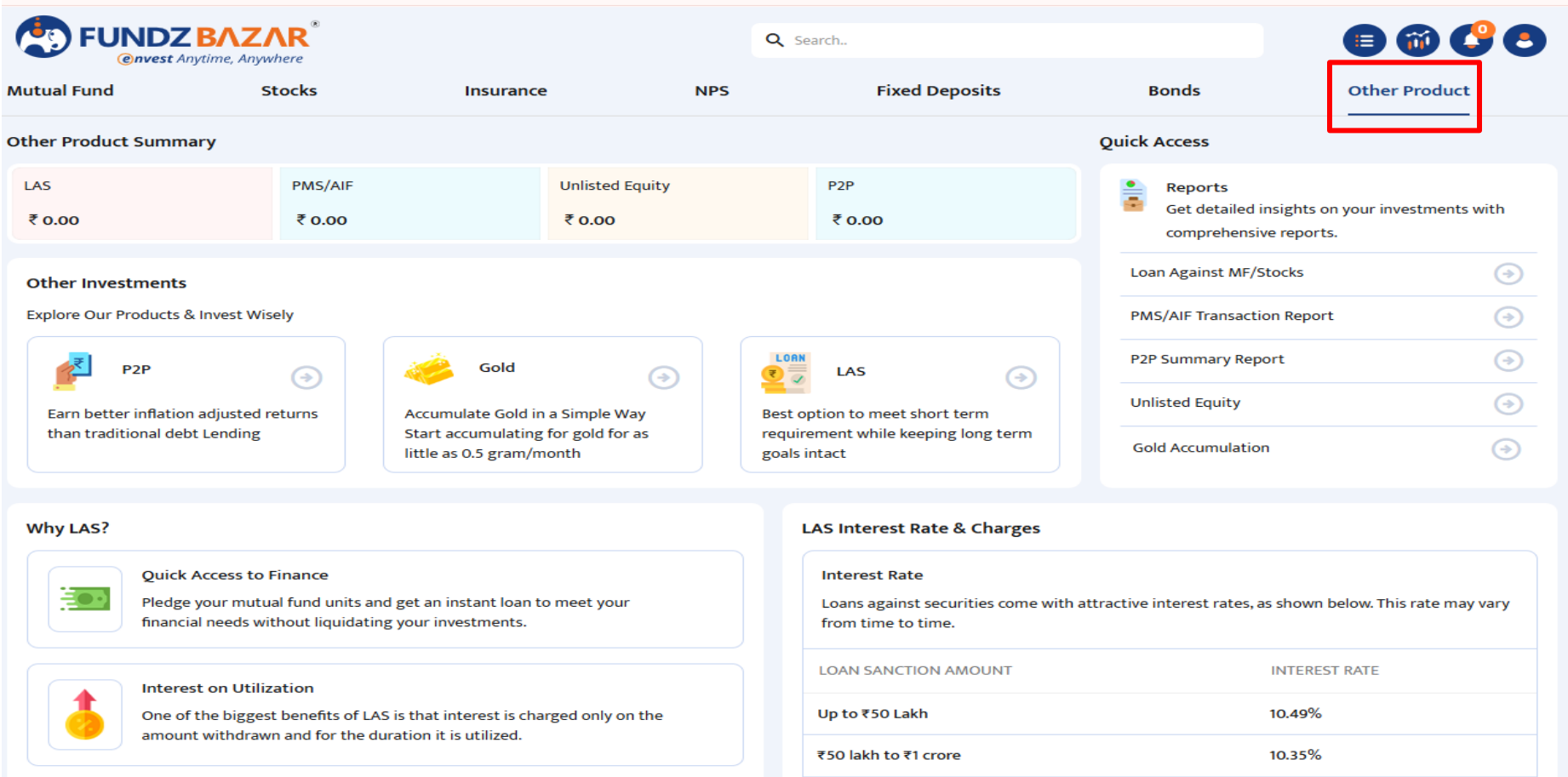
Get a complete understanding of bonds, analyze your portfolio with smart insights, and find answers to all your FAQs in one place.

**Basic components of Bond**

Discover the essential components that define a bond. From interest rates to risk factors, get a complete understanding in one place!

# Other Products : Invest in other products using FundzBazar

Click on other products to view summary and invest in it.



**FUNDZ BAZAR**  
@invest Anytime, Anywhere

Search..

Mutual Fund   Stocks   Insurance   NPS   Fixed Deposits   Bonds   **Other Product**

### Other Product Summary

LAS ₹ 0.00	PMS/AIF ₹ 0.00	Unlisted Equity ₹ 0.00	P2P ₹ 0.00
---------------	-------------------	---------------------------	---------------

### Other Investments

Explore Our Products & Invest Wisely

- P2P**  
Earn better inflation adjusted returns than traditional debt Lending
- Gold**  
Accumulate Gold in a Simple Way  
Start accumulating for gold for as little as 0.5 gram/month
- LAS**  
Best option to meet short term requirement while keeping long term goals intact

### Quick Access

- Reports  
Get detailed insights on your investments with comprehensive reports.
- Loan Against MF/Stocks
- PMS/AIF Transaction Report
- P2P Summary Report
- Unlisted Equity
- Gold Accumulation

### Why LAS?

- Quick Access to Finance**  
Pledge your mutual fund units and get an instant loan to meet your financial needs without liquidating your investments.
- Interest on Utilization**  
One of the biggest benefits of LAS is that interest is charged only on the amount withdrawn and for the duration it is utilized.

### LAS Interest Rate & Charges

LOAN SANCTION AMOUNT	INTEREST RATE
Up to ₹50 Lakh	10.49%
₹50 lakh to ₹1 crore	10.35%

Loans against Securities is a type of an overdraft facility wherein you need to pledge mutual fund units or Shares with FundzBazar broking or Both as collateral and get the loan ranging from Rs.20,000 to 10 crores.

## Reasons why Loan against Securities is the right choice:

- ❖ **Quick Access to Finance** – Pledge your MF units or shares with Fundzbazar broking and get the instant loan to meet your financial requirements without liquidating your investments.
- ❖ **Interest on Utilization** – One of the biggest benefits of LAS is that interest is charged only on the amount withdrawn and for the time period it is being utilized.
- ❖ **Retention of ownership** – LAS facilitates you to reap benefits that come from your investments as you still enjoy the ownership of your investments.
- ❖ **Zero part-payment and foreclosure charges** – As there are no prepayment and foreclosure charges you can repay your loan at your convenience.

- Liquiloans, is a peer-to-peer lending platform. Leveraging technology, it connects borrowers and lenders directly, cutting out the middleman margins typically charged by banks and NBFCs.
- This makes borrowing cheaper and investing more attractive compared to traditional options.

## How does it work?



Create an account and  
Invest money



Your money gets divided  
across high quality  
borrowers



Earn consistent & High  
Returns



Compound your interest  
or request a withdrawal  
anytime

**Gold Accumulation Plan is an investment facility which allows investor to accumulate money for buying gold for specific purposes**



**Cost Effective  
& Secure**



**Safer compared  
to Physical Gold**



**No need to visit  
Jeweler**

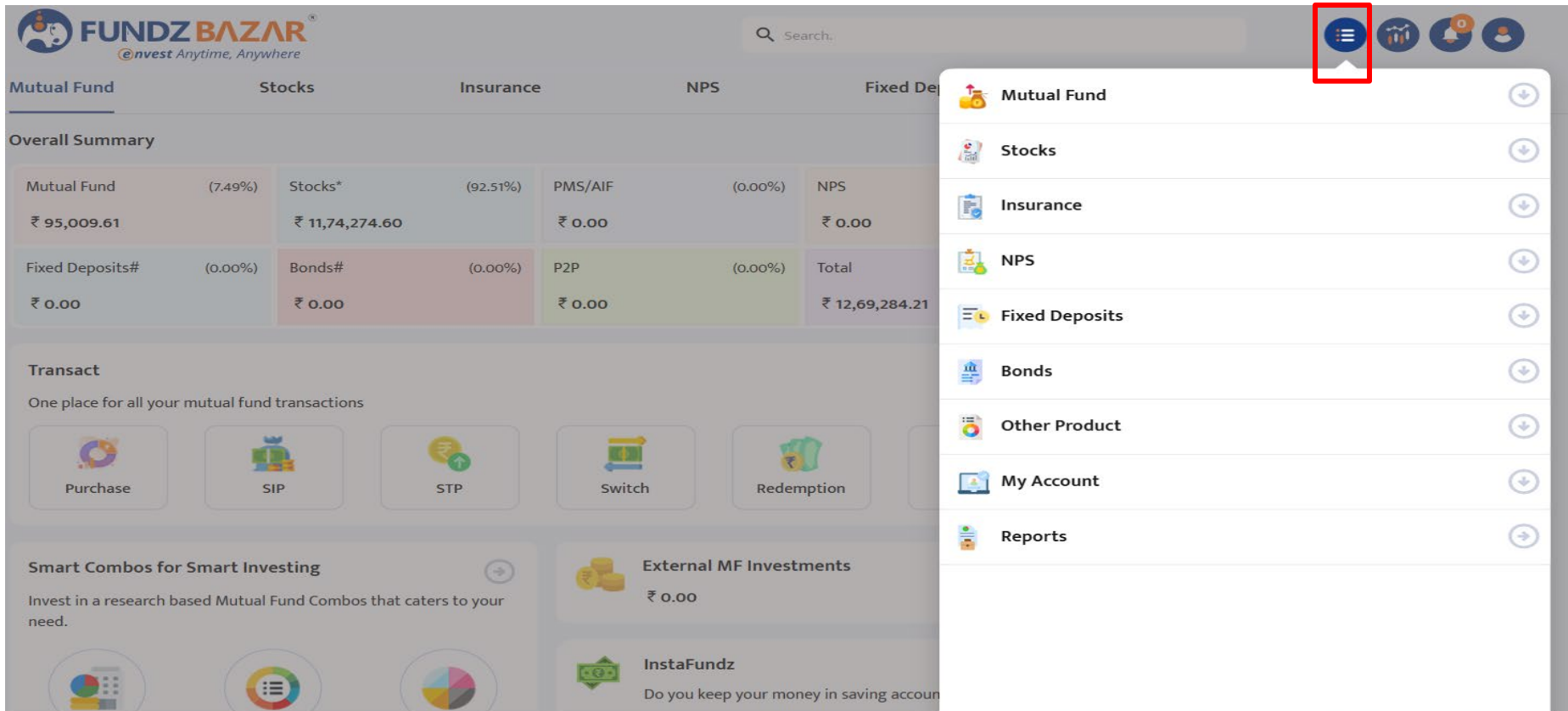


**Sell & Redeem at  
your wish**

**You can start accumulating money for gold by purchasing as little as 0.5 Gram at prevailing gold price on MCX**

# Home Page: View product wise all reports

You can also view product specific information, reports and account related options using this tab in the homepage.



The screenshot shows the FUNDZ BAZAR homepage. The top navigation bar includes the logo, a search bar, and a menu icon (highlighted with a red box). The menu is open, showing options: Mutual Fund, Stocks, Insurance, NPS, Fixed Deposits, Bonds, Other Product, My Account, and Reports. The main content area features an 'Overall Summary' table, a 'Transact' section with buttons for Purchase, SIP, STP, Switch, and Redemption, and a 'Smart Combos for Smart Investing' section.

Mutual Fund	(7.49%)	Stocks*	(92.51%)	PMS/AIF	(0.00%)	NPS
₹ 95,009.61		₹ 11,74,274.60		₹ 0.00		₹ 0.00

Fixed Deposits#	(0.00%)	Bonds#	(0.00%)	P2P	(0.00%)	Total
₹ 0.00		₹ 0.00		₹ 0.00		₹ 12,69,284.21

**Transact**  
One place for all your mutual fund transactions

Purchase SIP STP Switch Redemption

**Smart Combos for Smart Investing**  
Invest in a research based Mutual Fund Combos that caters to your need.

**External MF Investments**  
₹ 0.00

**InstaFundz**  
Do you keep your money in saving account

## Fundzbazar Homepage



Search..



Mutual Fund

Stocks

Insurance

NPS

Fixed Deposits

Bonds

Other Products

### Overall Summary

Mutual Fund (7.49%) ₹ 95,009.61	Stocks* (92.51%) ₹ 11,74,274.60	PMS/AIF (0.00%) ₹ 0.00	NPS (0.00%) ₹ 0.00
Fixed Deposits# (0.00%) ₹ 0.00	Bonds# (0.00%) ₹ 0.00	P2P (0.00%) ₹ 0.00	Total (100.00%) ₹ 12,69,284.21

### Mutual Fund Summary

Investment Value ₹ 73,000.02	Current Value ₹ 95,009.61
Short Term G/L ₹ 315.57	Long Term G/L ₹ 21,697.65
Absolute (%) 30.15 ↑	Annualized (%) 15.88 ↑
Monthly SIP Value ₹ 1,000.00	

### Transact

One place for all your mutual fund transactions



### Smart Combos for Smart Investing

Invest in a research based Mutual Fund Combos that caters to your need.

**External MF Investments**  
₹ 0.00 FETCH

**InstaFundz**  
Do you keep your money in saving account?

**Loan Against Securities**  
₹ 0 AVAIL LOAN

Quick Access

View Notifications using this tab.

Open FundzBazar broking using this tab.

## Manage Your Account



Search..



Mutual Fund      Stocks      Insurance      NPS      Fixed Deposits      Bonds      Other Product

### Overall Summary

Mutual Fund (7.49%) ₹ 95,009.61	Stocks* (92.51%) ₹ 11,74,274.60	PMS/AIF (0.00%) ₹ 0.00	NPS (0.00%) ₹ 0.00
Fixed Deposits# (0.00%) ₹ 0.00	Bonds# (0.00%) ₹ 0.00	P2P (0.00%) ₹ 0.00	

### Mutual Fund Summary

Investment Value ₹ 73,000.02	Current Value ₹ 95,009.61
Short Term G/L ₹ 215.57	Long Term G/L ₹ 21,507.65

Manage your account using this tab

### Transact

One place for all your mutual fund transactions

Purchase      SIP      STP      Switch

### Smart Combos for Smart Investing

Invest in a research based Mutual Fund Combos that caters to your need.



External MF ₹ 0.00

InstaFundz Do you keep y

### My Account

- > Investors Details
- > Manage Mandate
- > Manage Account
- > Manage Account Closure
- > Manage Query
- > FB Plus
- > Manage NEFT/RTGS
- > Online KYC Modification Request

### Welcome ARORA

Change Password

### Your RM

Staff

Click to Sign-out.

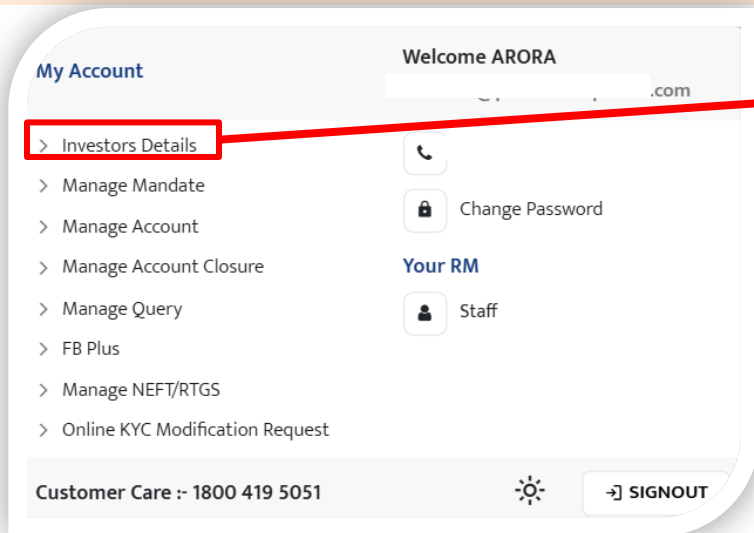
Click to turn night mode.



SIGNOUT

Customer Care :- 1800 419 5051

## Manage Your Account



**My Account**

Welcome ARORA

- > Investors Details
- > Manage Mandate
- > Manage Account
- > Manage Account Closure
- > Manage Query
- > FB Plus
- > Manage NEFT/RTGS
- > Online KYC Modification Request

Change Password

Your RM

- Staff

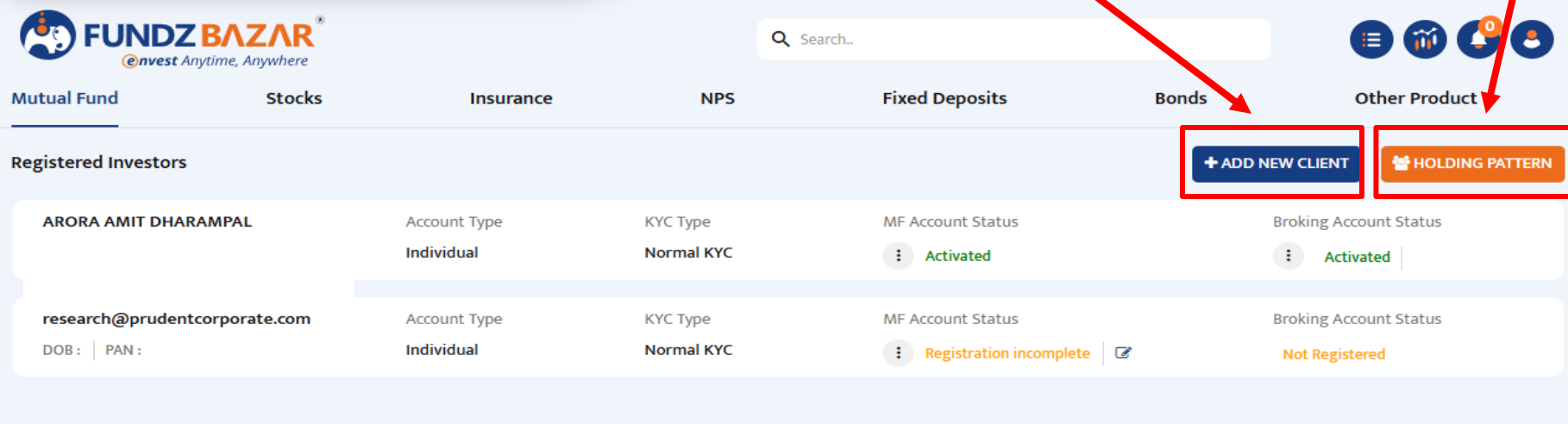
Customer Care :- 1800 419 5051

SIGNOUT

**Investor Details**– View details of the registered investors using this.

**Holding Pattern**– View Holding patterns using this tab.

**Add New Client** – Add any of your family members as investor in order to start investing online in their names in the same account (Login).



FUNDZ BAZAR  
einvest Anytime, Anywhere

Search..

Mutual Fund | Stocks | Insurance | NPS | Fixed Deposits | Bonds | Other Product

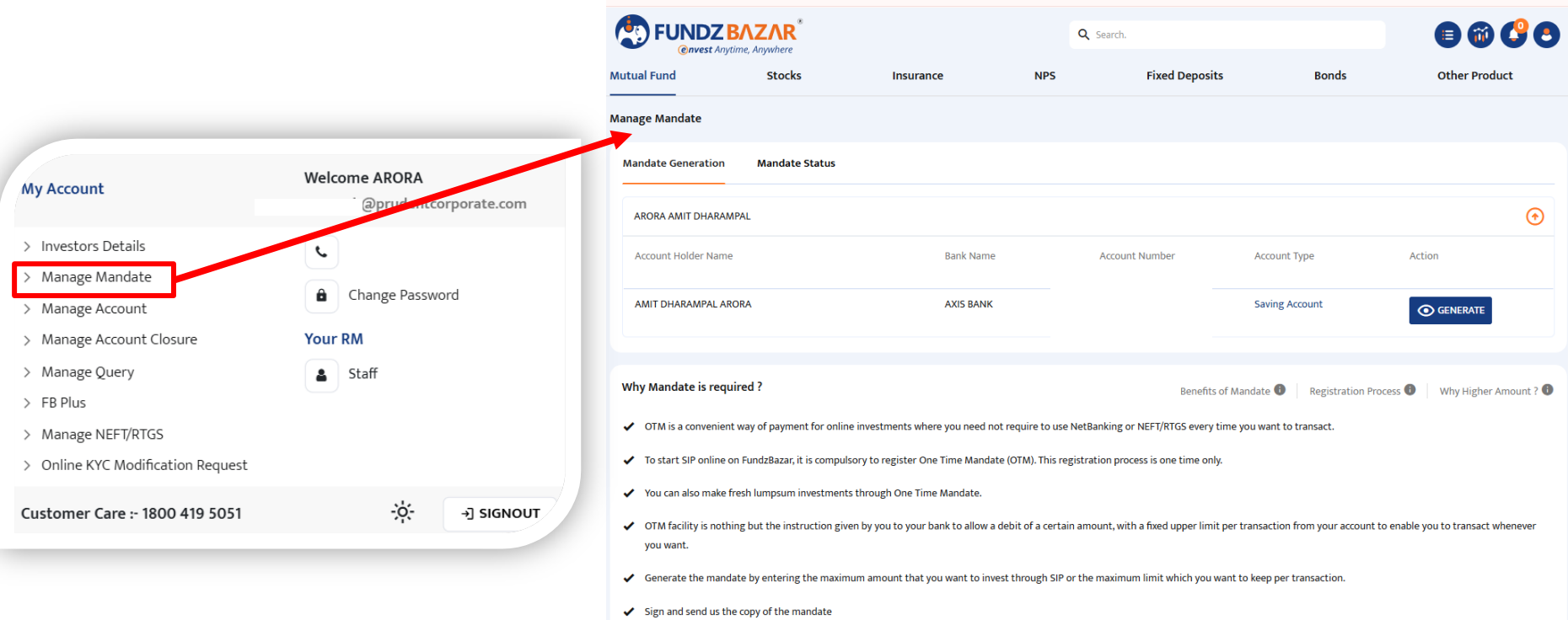
Registered Investors

ARORA AMIT DHARAMPAL	Account Type Individual	KYC Type Normal KYC	MF Account Status Activated	Broking Account Status Activated
research@prudentcorporate.com DOB :   PAN :	Account Type Individual	KYC Type Normal KYC	MF Account Status Registration incomplete	Broking Account Status Not Registered

+ ADD NEW CLIENT

HOLDING PATTERN

**Manage Mandate – OTM** is a convenient way of payment for online investments where you need not require to use Net Banking or NEFT/RTGS every time you want to transact.



**My Account**

Welcome ARORA  
@prudentcorporate.com

- > Investors Details
- > **Manage Mandate**
- > Manage Account
- > Manage Account Closure
- > Manage Query
- > FB Plus
- > Manage NEFT/RTGS
- > Online KYC Modification Request

Customer Care :- 1800 419 5051

SIGNOUT

**FUNDZ BAZAR**  
einvest Anytime, Anywhere

Mutual Fund | Stocks | Insurance | NPS | Fixed Deposits | Bonds | Other Product

### Manage Mandate

Mandate Generation | Mandate Status

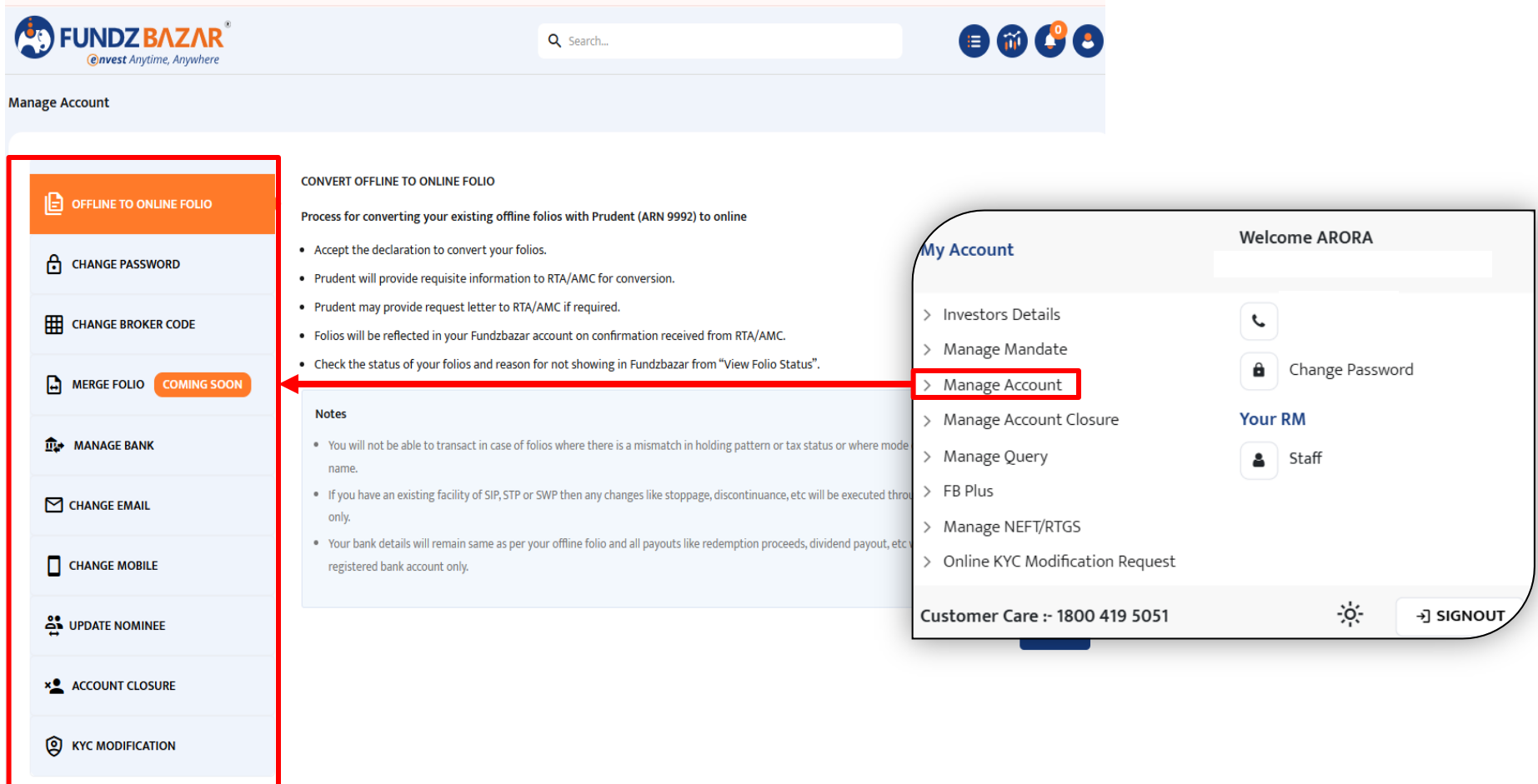
Account Holder Name	Bank Name	Account Number	Account Type	Action
ARORA AMIT DHARAMPAL				
AMIT DHARAMPAL ARORA	AXIS BANK		Saving Account	<a href="#">GENERATE</a>

**Why Mandate is required ?**

- Benefits of Mandate
- Registration Process
- Why Higher Amount ?

- ✓ OTM is a convenient way of payment for online investments where you need not require to use NetBanking or NEFT/RTGS every time you want to transact.
- ✓ To start SIP online on FundzBazar, it is compulsory to register One Time Mandate (OTM). This registration process is one time only.
- ✓ You can also make fresh lumpsum investments through One Time Mandate.
- ✓ OTM facility is nothing but the instruction given by you to your bank to allow a debit of a certain amount, with a fixed upper limit per transaction from your account to enable you to transact whenever you want.
- ✓ Generate the mandate by entering the maximum amount that you want to invest through SIP or the maximum limit which you want to keep per transaction.
- ✓ Sign and send us the copy of the mandate

**Manage Account** – Use this facility to change offline to online folio, change in password, Broker code, Manage Bank, Email, Mobile number, Nominee, KYC Modification.



**FUNDZ BAZAR**  
einvest Anytime, Anywhere

Search...

Manage Account

**OFFLINE TO ONLINE FOLIO**

**CHANGE PASSWORD**

**CHANGE BROKER CODE**

**MERGE FOLIO** **COMING SOON**

**MANAGE BANK**

**CHANGE EMAIL**

**CHANGE MOBILE**

**UPDATE NOMINEE**

**ACCOUNT CLOSURE**

**KYC MODIFICATION**

**CONVERT OFFLINE TO ONLINE FOLIO**

Process for converting your existing offline folios with Prudent (ARN 9992) to online

- Accept the declaration to convert your folios.
- Prudent will provide requisite information to RTA/AMC for conversion.
- Prudent may provide request letter to RTA/AMC if required.
- Folios will be reflected in your Fundzbazar account on confirmation received from RTA/AMC.
- Check the status of your folios and reason for not showing in Fundzbazar from "View Folio Status".

**Notes**

- You will not be able to transact in case of folios where there is a mismatch in holding pattern or tax status or where mode of payment is not as per the name.
- If you have an existing facility of SIP, STP or SWP then any changes like stoppage, discontinuance, etc will be executed through the existing facility only.
- Your bank details will remain same as per your offline folio and all payouts like redemption proceeds, dividend payout, etc will be credited to the registered bank account only.

**My Account**

Welcome ARORA

- > Investors Details
- > Manage Mandate
- > **Manage Account**
- > Manage Account Closure
- > Manage Query
- > FB Plus
- > Manage NEFT/RTGS
- > Online KYC Modification Request

Change Password

**Your RM**

Staff

Customer Care :- 1800 419 5051

SIGNOUT

## Manage Account Closure- Select the account and type to close



Search..



Mutual Fund      Stocks      Insurance      NPS      Fixed Deposits      Bonds      Other Product

Select account for close

First Account Holder  
ARORA AMIT DHARAMPAL



First Account Holder



My Account

Welcome ARORA

- > Investors Details
- > Manage Mandate
- > Manage Account
- > **Manage Account Closure**
- > Manage Query
- > FB Plus
- > Manage NEFT/RTGS
- > Online KYC Modification Request



Change Password

Your RM



Staff

Customer Care :- 1800 419 5051



SIGNOUT

Account Type



FundzBazar



Broking



Both

SHOW

You can select the account for closure after selecting the account.



**FB Plus-** This feature will give access to authorized person(selected by you) to view your portfolio for a specific time decided by you. You can make changes in the request anytime.



Search

Mutual Fund      Stocks      Insurance      NPS      Fixed

## FB PLUS

FB Plus Request      FB Plus Details

PAN Card

Enter PAN

Client Name

Client Name

Access Start Date

DD/MM/YYYY

Access End Date

DD/MM/YYYY

I agree and accept the below declaration:

I hereby confirm that the recipient of the request is known to me and I will be allowed access to view his/her portfolio subject to the acceptance of the request by the recipient. I understand and agree that I may be held liable for any disputes that may arise in future with respect to this consent.

RESET

SUBMIT

My Account

Welcome ARORA

- > Investors Details
- > Manage Mandate
- > Manage Account
- > Manage Account Closure
- > Manage Query
- > **FB Plus**
- > Manage NEFT/RTGS
- > Online KYC Modification Request

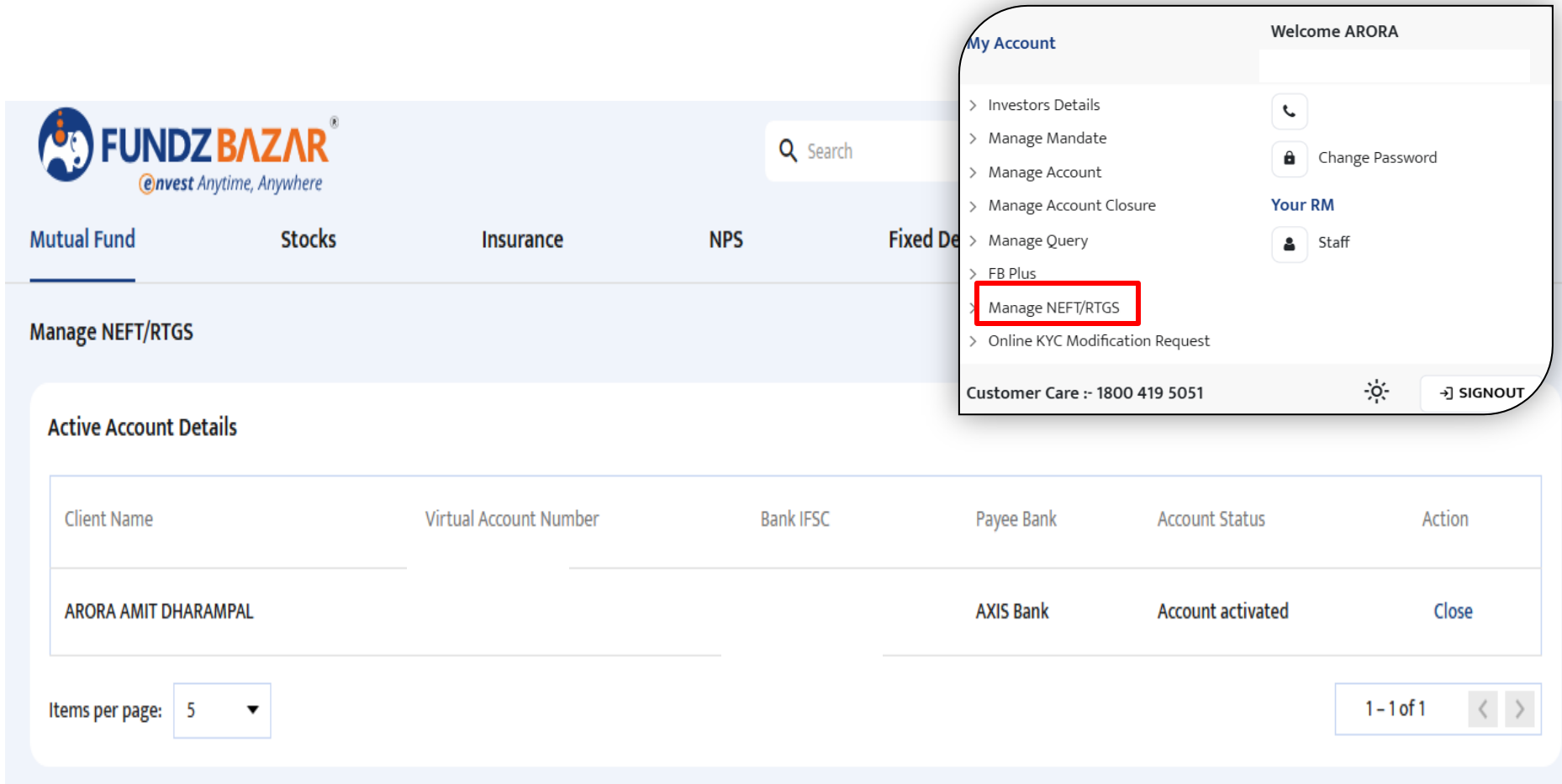
- ☎
- 🔒 Change Password
- Your RM
- 👤 Staff

Customer Care :- 1800 419 5051



→ SIGNOUT

**Manage NEFT/RTGS-** This will help to manage your NEFT/RTGS transactions.



**My Account**

- > Investors Details
- > Manage Mandate
- > Manage Account
- > Manage Account Closure
- > Manage Query
- > FB Plus
- > **Manage NEFT/RTGS**
- > Online KYC Modification Request

Welcome ARORA

Change Password

Your RM

Staff

Customer Care :- 1800 419 5051

SIGNOUT

**Active Account Details**

Client Name	Virtual Account Number	Bank IFSC	Payee Bank	Account Status	Action
ARORA AMIT DHARAMPAL			AXIS Bank	Account activated	Close

Items per page: 5

1 - 1 of 1

**Online KYC Modification-** You can do KYC modification online using FundzBazar.

## KYC Modification

[Download Process Note](#)

PAN:

K O A B 6 D

Change

I understand and agree that I may be required to provide certain information including contact details including contact details for the purpose of communicating me about promotional material, new products and services, and other information. I understand that I may be required to provide certain information including contact details for the purpose of communicating me about promotional material, new products and services, and other information.

### Note:

- Once you click on submit button, you will be redirected to CAMS portal for KYC modification.
- Your PAN will be captured from Prudent.
- As a prerequisite for doing KYC Modification, you should have a camera enabled devices i.e. Laptop, Mobile preferably.
- Please take a note for e-Sign & KYC Modification process your Mobile Number / Email ID should be seeded with your Aadhaar.

### My Account

Welcome ARORA

- > Investors Details
- > Manage Mandate
- > Manage Account
- > Manage Account Closure
- > Manage Query
- > FB Plus
- > Manage NEFT/RTGS
- > **Online KYC Modification Request**



Change Password

### Your RM

Staff

Customer Care :- 1800 419 5051



SIGNOUT

SUBMIT

# Register & Transact through Mobile App

Easy Login & Signup facility

Detailed Dashboard

All features to cater your needs

Easy to Invest



## Know Us



ABOUT US



WHY US?



REACH US



BLOG



VIDEO



ARTICLE

## Calculator



Estimate your returns easily with our investment calculator.

## Broking



MARKET



RESEARCH



IPO

LOGIN

Don't have an Account? [Sign Up](#)



## Dashboard

### Overall Summary



Mutual Fund  
2,97,964.47 ₹



Stock  
0.00 ₹



NPS  
0.00 ₹



FD\*  
0.00 ₹



Bond\*  
0.00 ₹



P2P  
0.00 ₹

### Mutual Fund Summary

Investment Value 2,06,547.95 ₹  
Ret Abs (%) 44.26 %

Current Value 2,97,964.47 ₹  
Ret Ann (%) 16.45 %

Short Term Gain 642.12 ₹

Broking Login

Logout



Invest



Plan



Mutual Fund



Reports



Broking



Stocks



Reports



Unique Offerings



Insurance



NPS



My Account



Fixed Deposits



NDC

Share app with friend



Broking Login

Logout



Invest

- Purchase
- SIP
- All Reports
- SIP
- STP
- STP
- Watchlist
- Switch
- Redemption
- SWP
- InstaFundz
- SWP
- Set up Trigger
- Goal Planner
- Trigger



Plan



Mutual Fund

Share app with friend



***Thank You for viewing our presentation.***

***We hope this would help you bring better clarity on  
how to transact online through FundzBazar***