

WISEINVEST MY PORTFOLIO APP (Android / IOS)

State-of-the-art Technology

**Seamless Online investing
Analytical Tools
Informed Investment Decisions**



Click “Buy Now” to invest in mutual funds

The first screen will display all MFs listed in alphabetical order

Select the MF and then the scheme

Next screen will display all the details of the scheme selected. Click “Invest now”.

Next screen will allow you to input the amount, choose the IIN / UCC and select the folio (if you have an existing folio). Therein, you also have an option to create a new folio.

Once you click on “Buy Now” at the bottom of the screen you can choose the payment method and confirm the order.

Click here to view “Wealthwise”- Our monthly Newsletter in English and Marathi





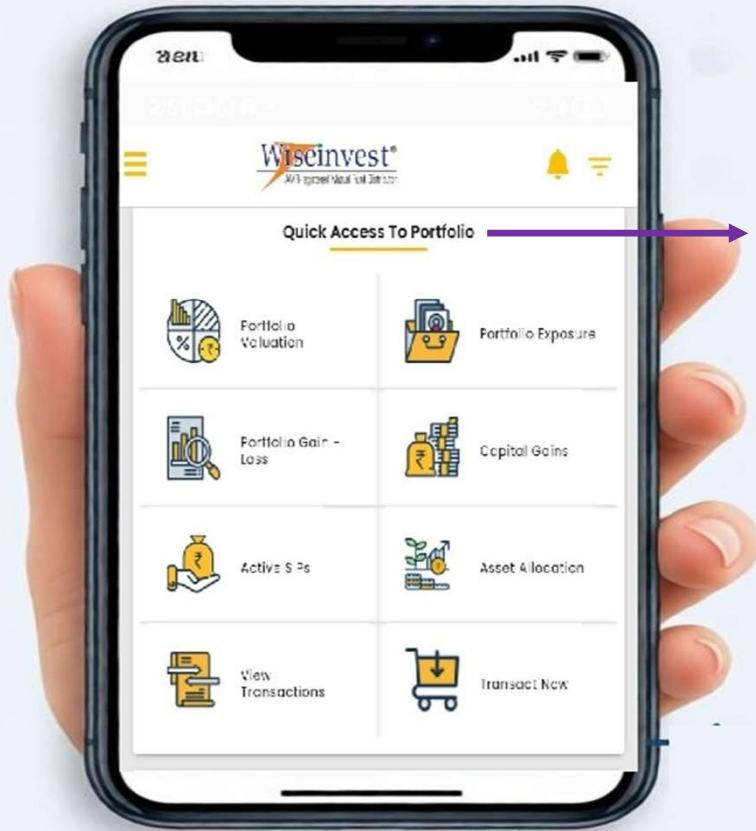
My Mutual Fund Portfolio

- Click on “My Mutual Fund Portfolio” to view details like allocation to different asset classes, portfolio XIRR, gain loss summary, your SIP details and portfolio exposure.
- Click on your Portfolio Summary to view scheme wise performance.
- To invest in any of the existing schemes, click on the Scheme to complete the rest of the process. You can view details like exit loads, if applicable.
- To redeem, click on the Scheme and confirm the transaction through a seamless process. There is a facility to check provisional capital gain / loss before proceeding with the redemption.



Explore Investment Opportunities

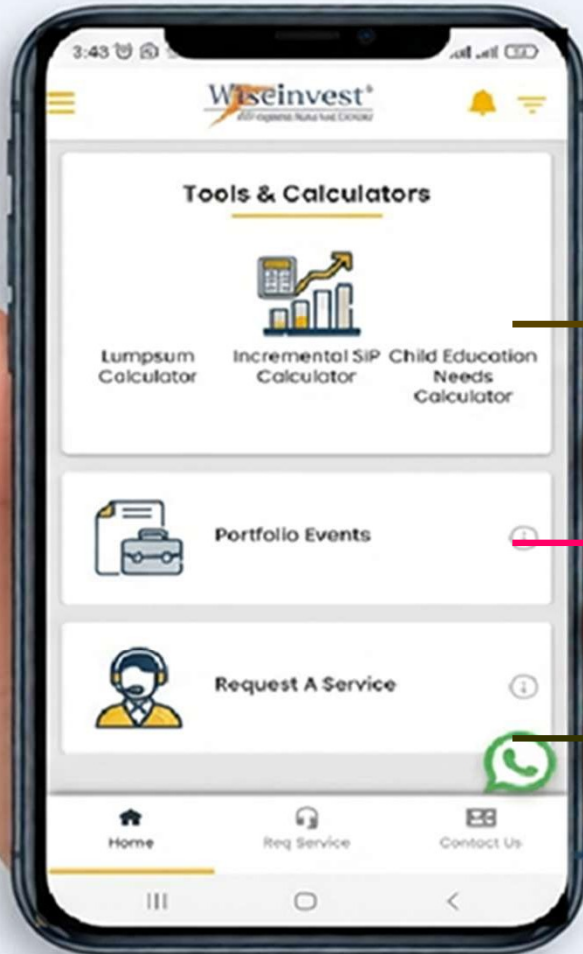
- We believe in providing data, analysis and performance track record of every scheme from all mutual funds to enable you to be in control of every investment decision.
- You can click on any category box to view the details of every scheme in that category.
- Click on ‘Search Mutual Fund’ to view mutual fund wise details of any scheme managed by it.



Quick Access to Portfolio

This section provides you every detail that you may require to keep yourself up-to-date- portfolio valuation report, risk levels, capital gains / loss (financial year wise), all your transactions (financial year wise) and your Active SIPs. You can also initiate a 'buy' or a 'sell' transaction by clicking on "Transact Now".

Tools and Calculators



Financial calculators are tools to figure out how much you need to invest for different goals, how your money can grow and comparison of SIP returns across schemes

Click on “Portfolio Events” to view the dates of your upcoming SIPs and failed transactions, if any.

Click on “Request a Service” to get in touch with us for any requirement.

Happy Investing!!

