

# Index

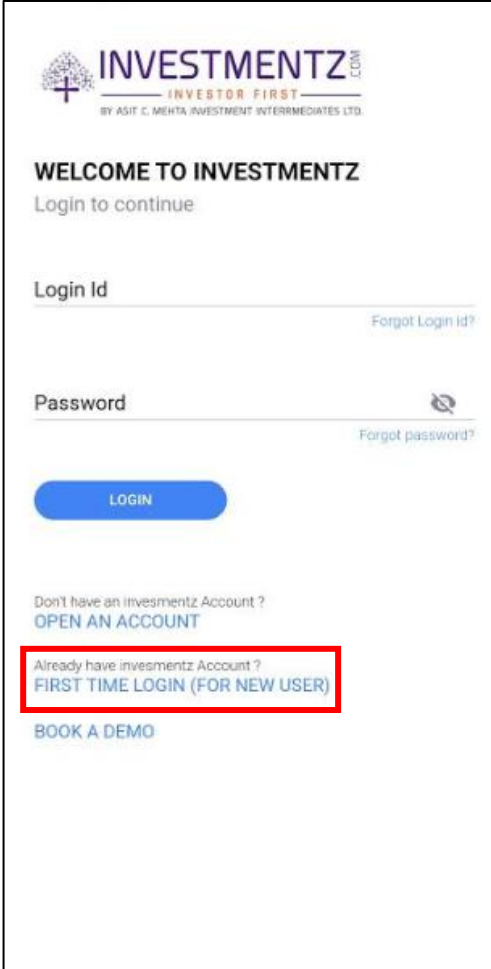
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## 1. Login

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

### 1.1. First Time Login

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



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

**WELCOME TO INVESTMENTZ**  
Login to continue

Login Id [Forgot Login Id?](#)

Password [Forgot password?](#)

**LOGIN**

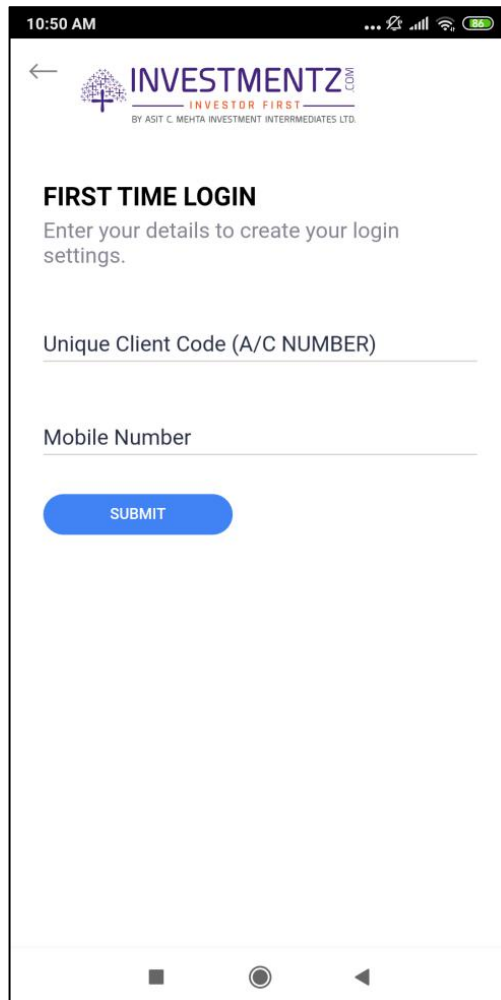
Don't have an Investmentz Account ?  
[OPEN AN ACCOUNT](#)

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

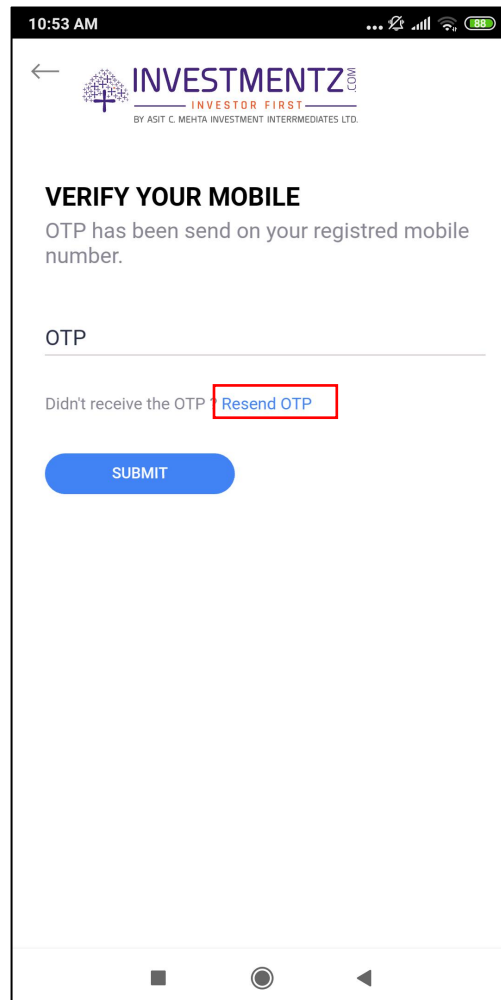
[BOOK A DEMO](#)

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

-



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



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

As you can see investmentz has a secure login for which it follows 2 factor authentication. You have to enter a 4 digit M-Pin which will be asked to you every time you login in Investmentz. Look at the image below:

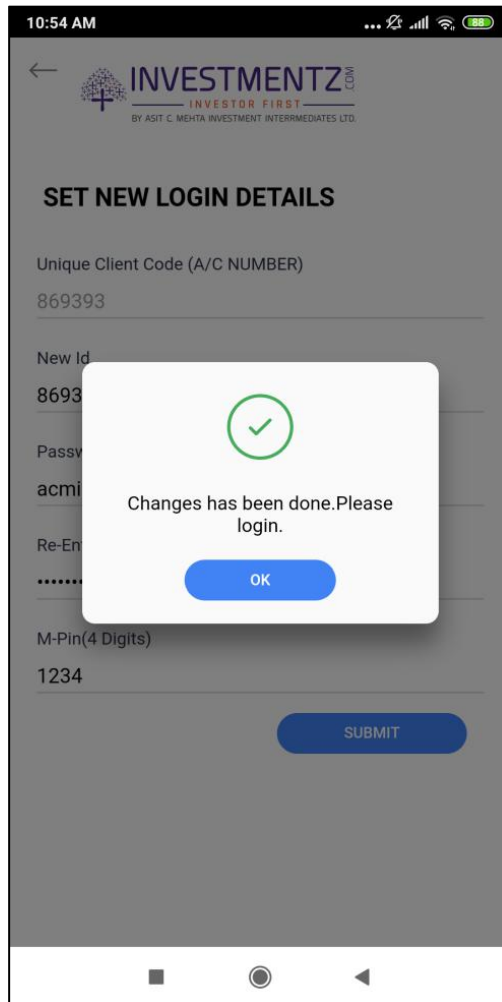
The image is a screenshot of a mobile application interface for Investmentz. At the top, the status bar shows the time as 10:54 AM and various system icons. Below the status bar is a navigation bar with a back arrow on the left and the Investmentz logo on the right. The logo consists of a stylized tree icon followed by the text 'INVESTMENTZ.COM' and 'INVESTOR FIRST' in smaller text below it. Underneath the logo, it says 'BY ASIT C. MEHTA INVESTMENT INTERMEDIATES LTD.'.

The main content area is titled 'SET NEW LOGIN DETAILS'. It contains several input fields:

- 'Unique Client Code (A/C NUMBER)' with the value '869393' entered.
- 'New Id' (empty).
- 'Password' (empty).
- 'Re-Enter Password' (empty).
- 'M-Pin(4 Digits)' (empty).

At the bottom right of the form area is a blue rounded rectangular button labeled 'SUBMIT'. At the very bottom of the screen is an Android-style navigation bar with three icons: a square, a circle, and a triangle.

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



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

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

**WELCOME TO INVESTMENTZ**  
Login to continue

Login Id [Forgot Login Id?](#)

Password [Forgot password?](#)

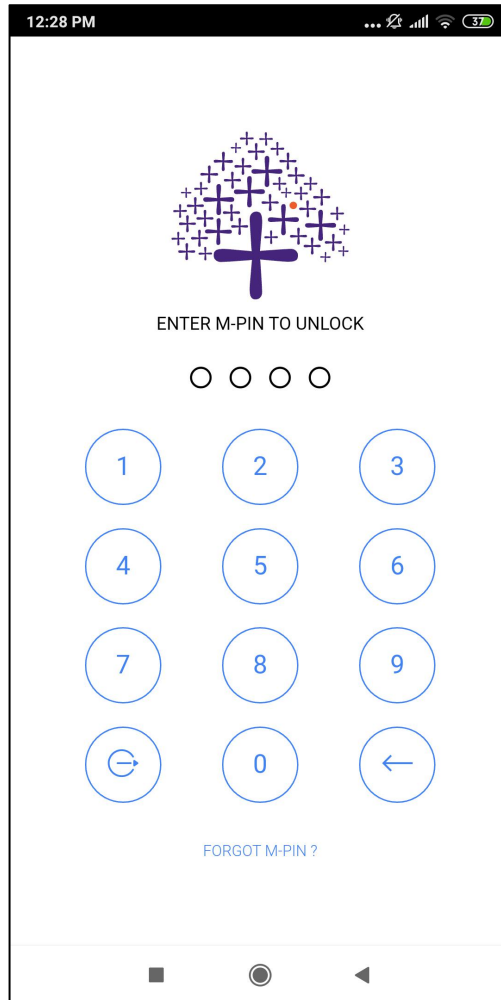
**LOGIN**

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

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

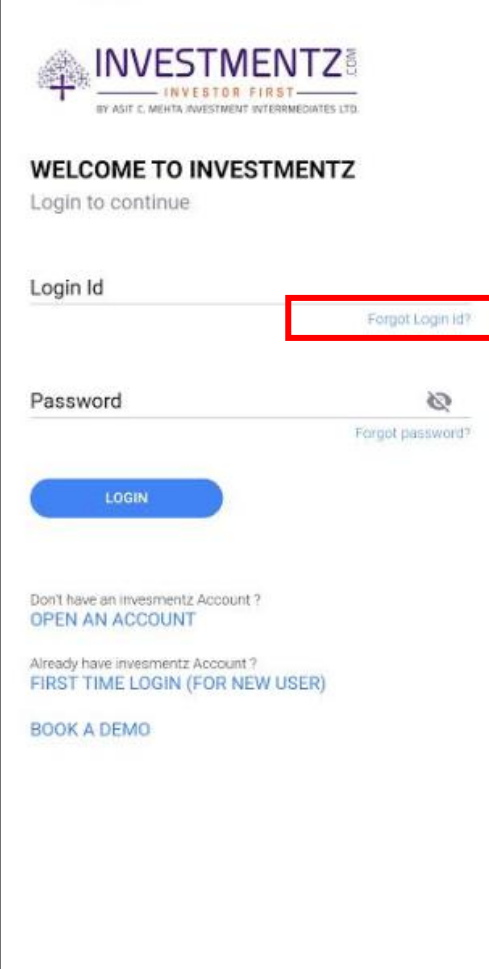
[BOOK A DEMO](#)

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





## 1.2. Forgot Login ID



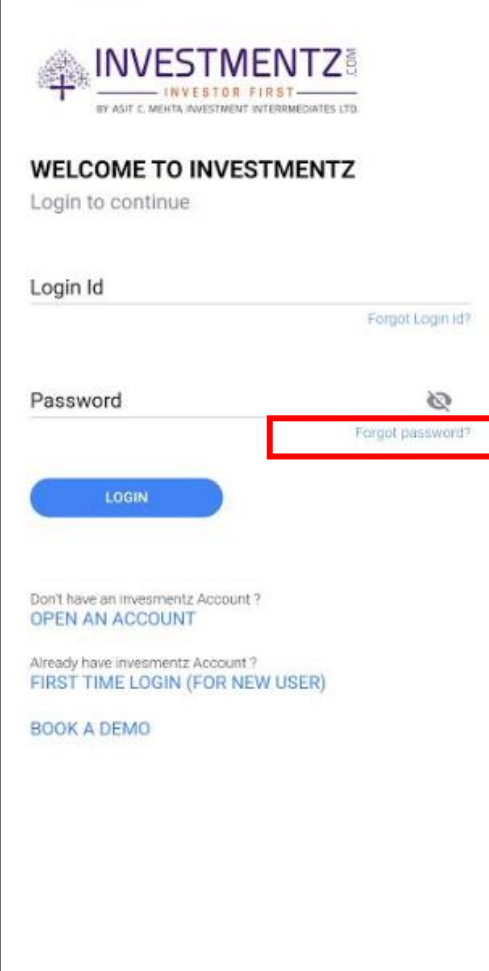
The screenshot shows the Investmentz login interface. At the top is the logo for INVESTMENTZ.COM, with the tagline 'INVESTOR FIRST' and 'BY ASIT C. MEHTA INVESTMENT INTERMEDIATES LTD.' Below the logo, it says 'WELCOME TO INVESTMENTZ' and 'Login to continue'. There are two input fields: 'Login Id' and 'Password'. The 'Forgot Login ID?' link is highlighted with a red box. Below the password field is a 'Forgot password?' link. A blue 'LOGIN' button is positioned below the input fields. At the bottom, there are three links: 'OPEN AN ACCOUNT', 'FIRST TIME LOGIN (FOR NEW USER)', and 'BOOK A DEMO'.

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

### 1.3. Forgot Password

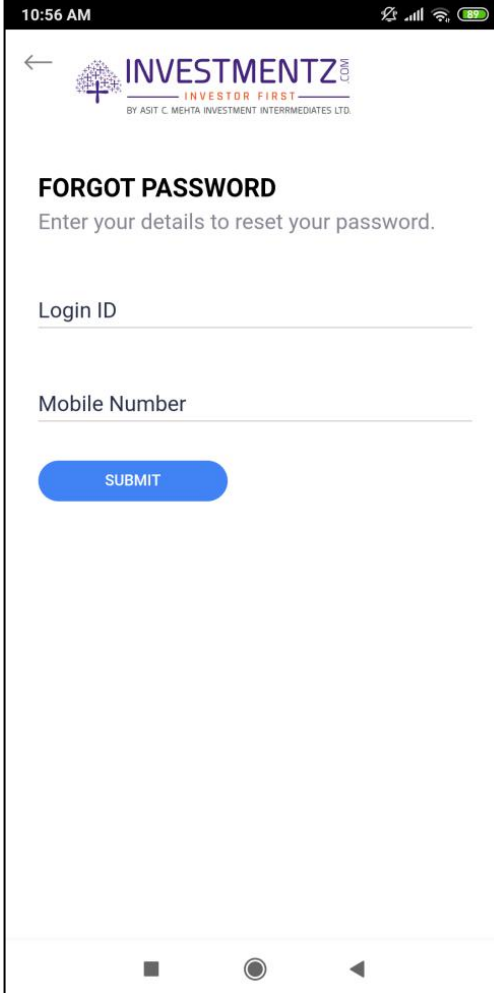
If you've entered your password or M-pin incorrectly 3 times and you try logging with the incorrect details for the 4th time, your account will be blocked. You can reset your password by following the steps mentioned below:

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



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

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



10:56 AM

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

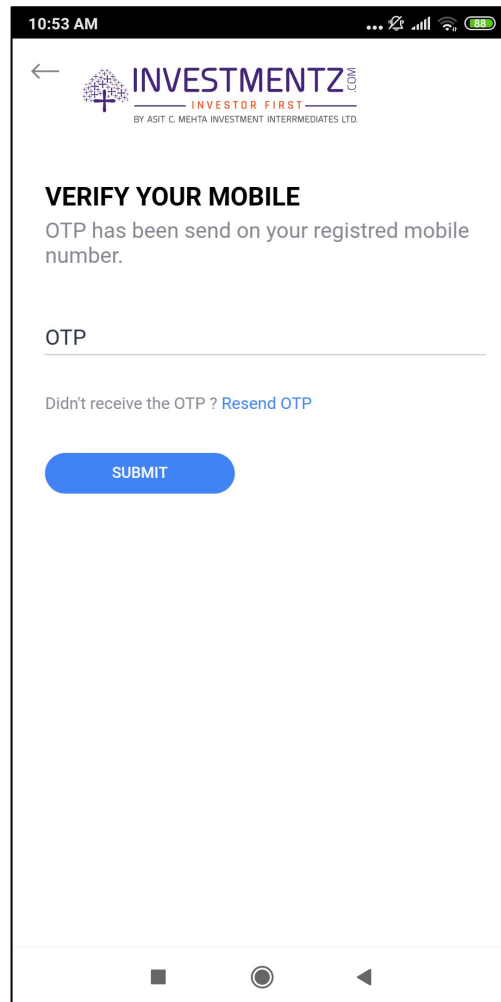
**FORGOT PASSWORD**  
Enter your details to reset your password.

Login ID \_\_\_\_\_

Mobile Number \_\_\_\_\_

SUBMIT

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




**Step 4 :** You can now create a new 8-15 string alphanumeric password. For confirmation you have to re-enter the password.

10:57 AM

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

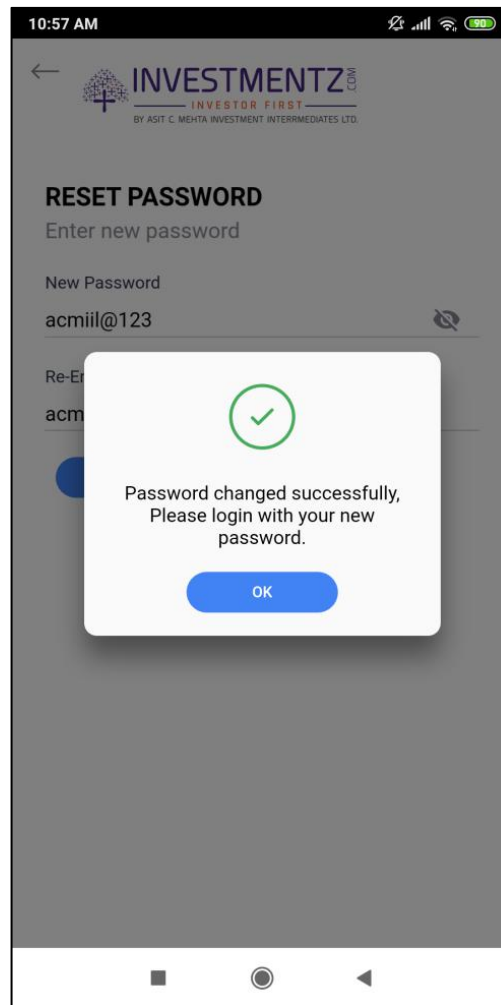
**RESET PASSWORD**  
Enter new password

New Password 

Re-Enter Password

**SUBMIT**

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

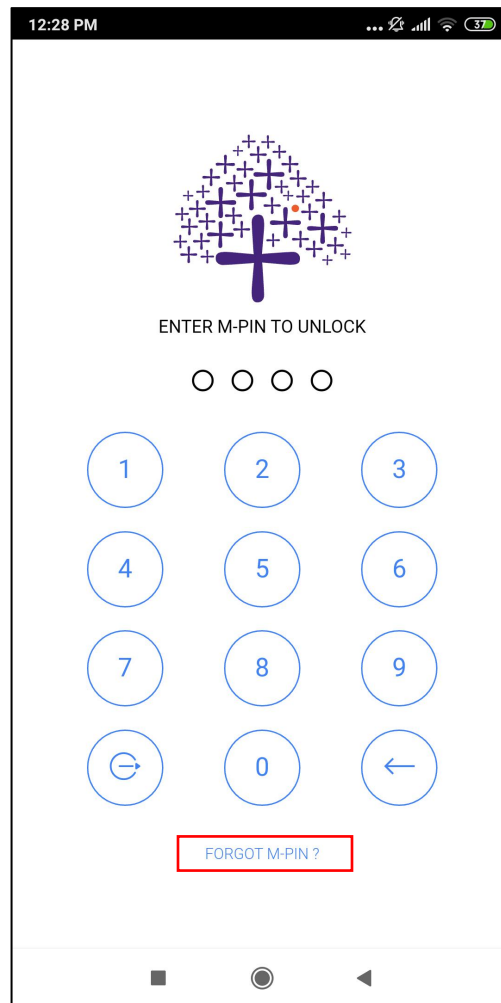


## 1.4. Forgot M-pin

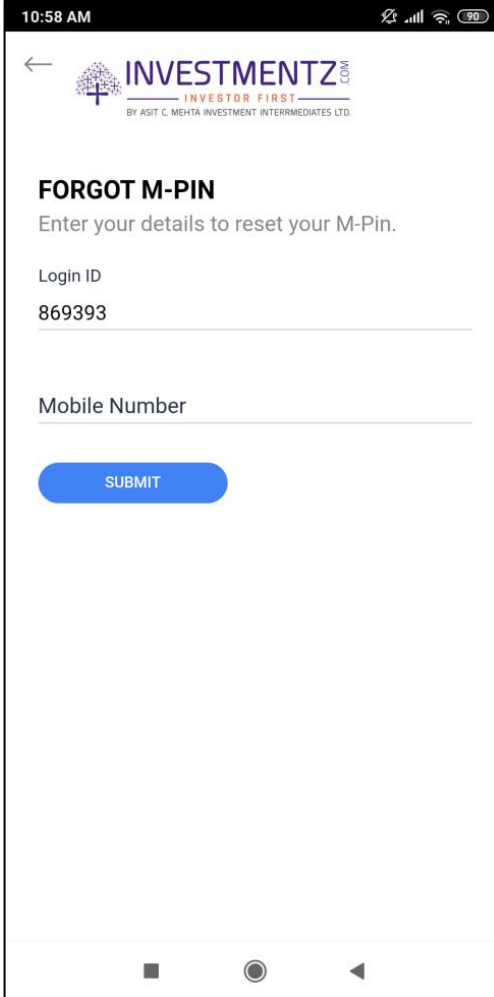
If you have forgotten the 2 Factor Authentication M-Pin you will not be able to login.

You can reset your M-PIN by following the steps mentioned below:

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



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



10:58 AM

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

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

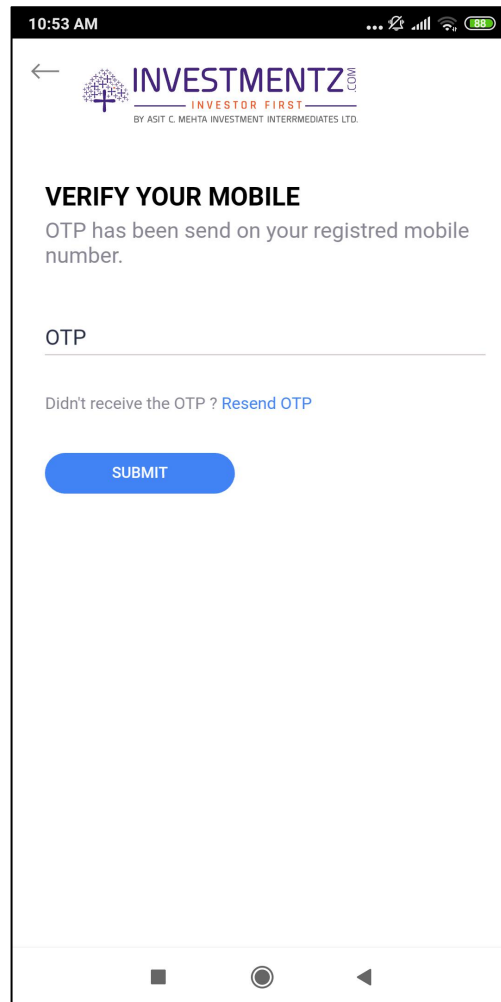
Login ID  
869393

Mobile Number

SUBMIT



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



**Step 4 :** You can now create a new M-Pin. For confirmation you have to re-enter the M-Pin.

10:59 AM

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

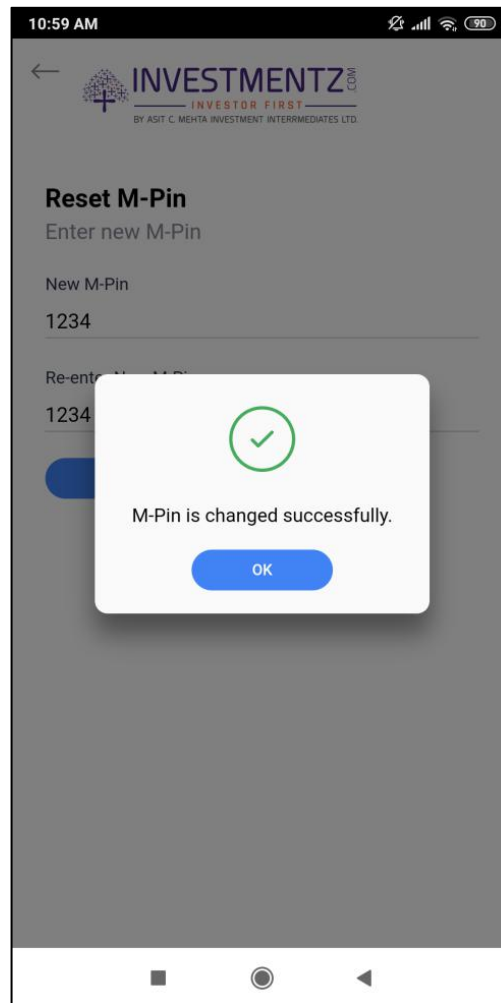
**Reset M-Pin**  
Enter new M-Pin

New M-Pin

Re-enter New M-Pin

SUBMIT

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

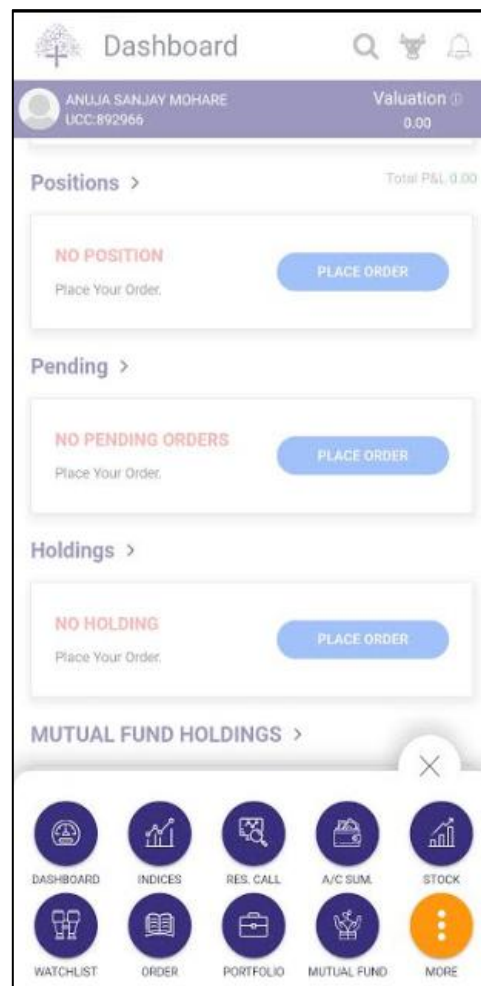
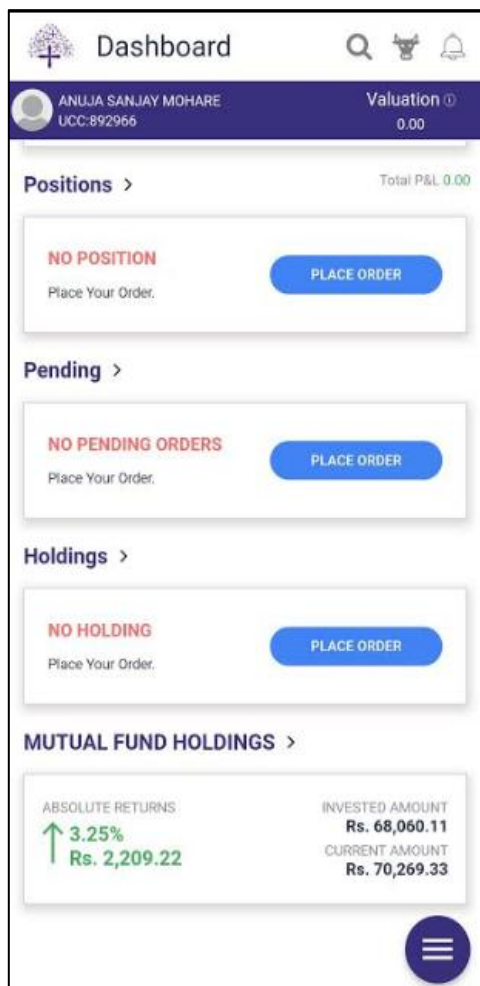


# Mutual Funds

**Note :** For anyone investing in mutual funds for the first time, it is important to note that unlike stocks where price changes every second, the NAV (Net asset value) of mutual funds change only once at end of every trading day. Orders placed to buy or redeem a fund are typically executed based on the NAV of the next trading day.

## 2. Menu

By clicking on Menu ----> Mutual funds, you can have access to Mutual Funds platform.



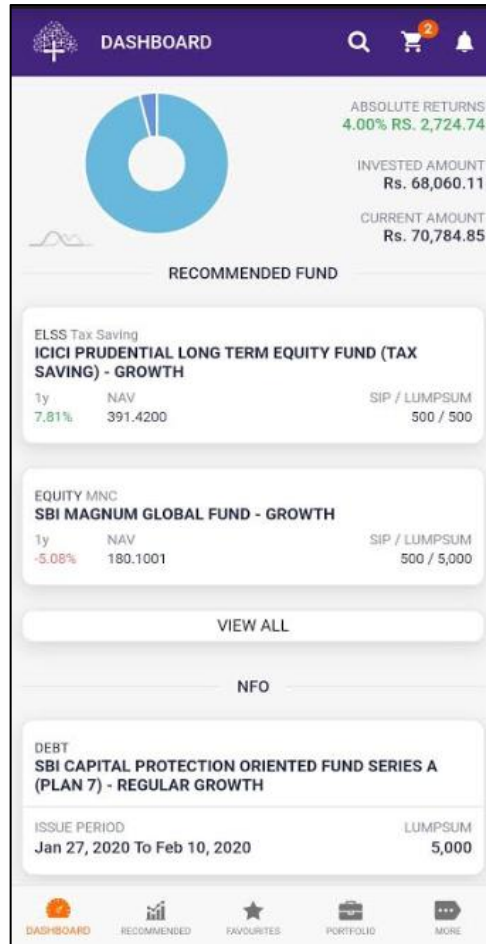
### 3. Dashboard

On dashboard screen you will get a Summary of your Mutual Funds holdings i.e. chart analysis with absolute returns, the invested amount & current amount.

Next is Recommended funds. When you click on View all, you will land on

Recommended fund page which is suggested by our Research team.

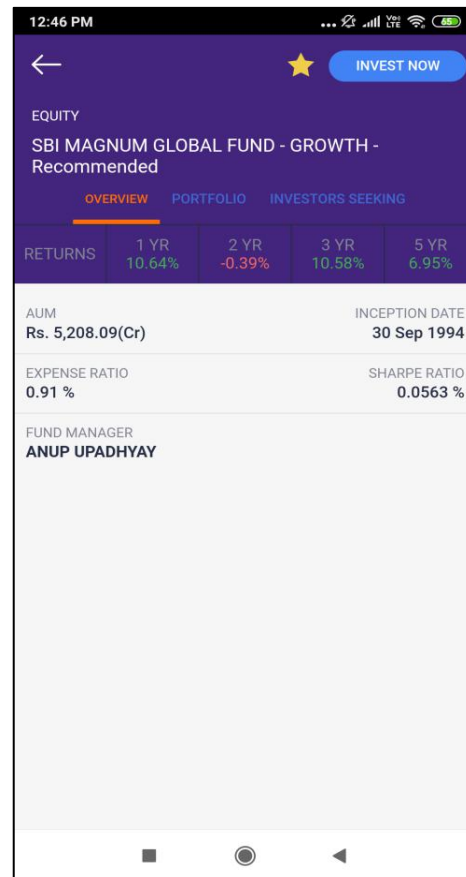
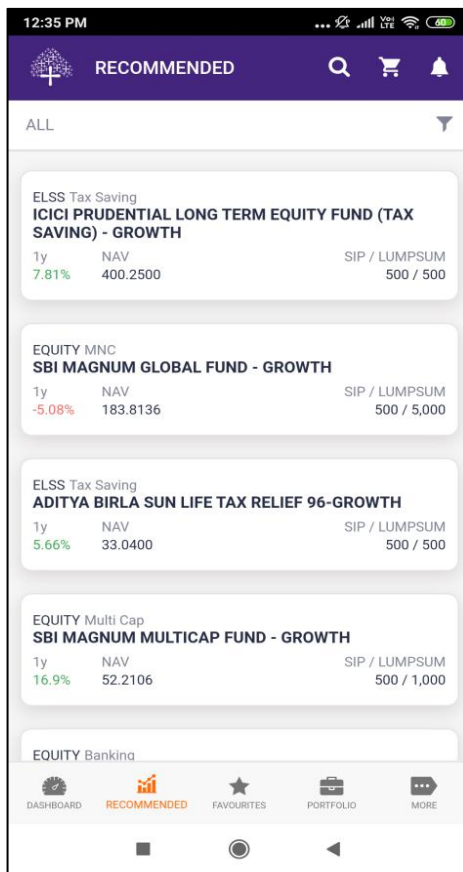
And at the bottom of the Dashboard, you can view NFO i.e (New Fund Offer)



## 4. Recommended Fund

By clicking on Recommended Fund, you can view funds which are recommended by the ACMIIL research team with detailed information i.e NAV, Returns, SIP/Lumpsum etc. Further when you click on fund you will land on overview screen.

**Overview** - Here you will get information related to returns based on 1yr to 5 yr, AUM, Expense ratio, Fund manager name, Inception date, Sharpe ratio etc.



**Portfolio of Fund** - By clicking on portfolio you will land on portfolio screen & you can view the portfolio of that scheme wrt % of net asset.

By clicking on sector you can view sector wise allocation wrt weightage in terms of %.

12:38 PM

← ★ INVEST NOW

DEBT

ESSEL REGULAR SAVING FUND - GROWTH

OVERVIEW PORTFOLIO INVESTORS SEEKING

ISSUERS SECTOR

TOP ISSUERS	% OF NET ASSETS
Tri-Party Repo (TREPS)	11.33
Tata Capital Housing Finance Ltd. SR-G 09.6% (22-Oct-19)	9.75
Rural Electrification Corpn Ltd SR-135 08.36% (22-Sep-20)	9.53
Power Finance Corpn. Ltd. SR-153 07.4% (30-Sep-21)	9.35
L&T Infrastructure Finance Company Ltd. SR-M OPT-1 08.4% (16-Aug-19)	6.95
Housing Development Finance Corporation Ltd. SR U-008 8.70% (15-Dec-20)	6.08
AU Small Finance Bank Ltd. (25-Feb-20)	4.46
Tata Capital Financial Services Ltd. SR-Z 08.85%	3.97

11:19 AM

← ★ INVEST NOW

ELSS Tax Saving

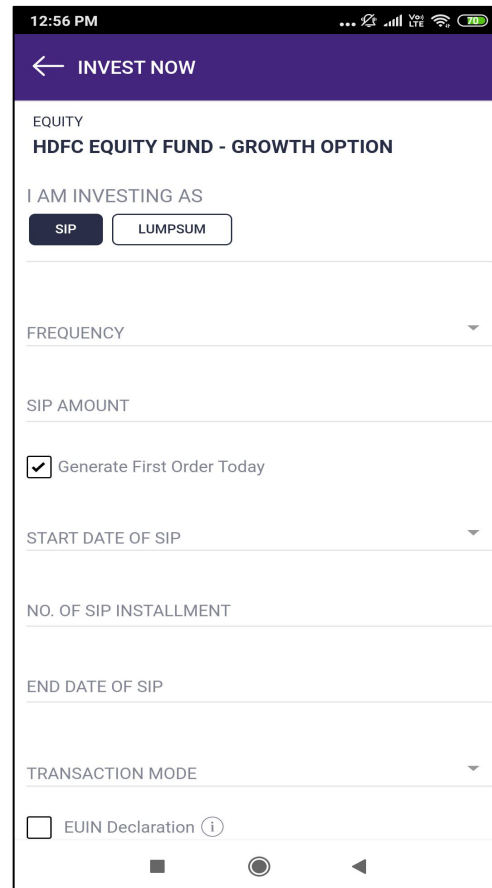
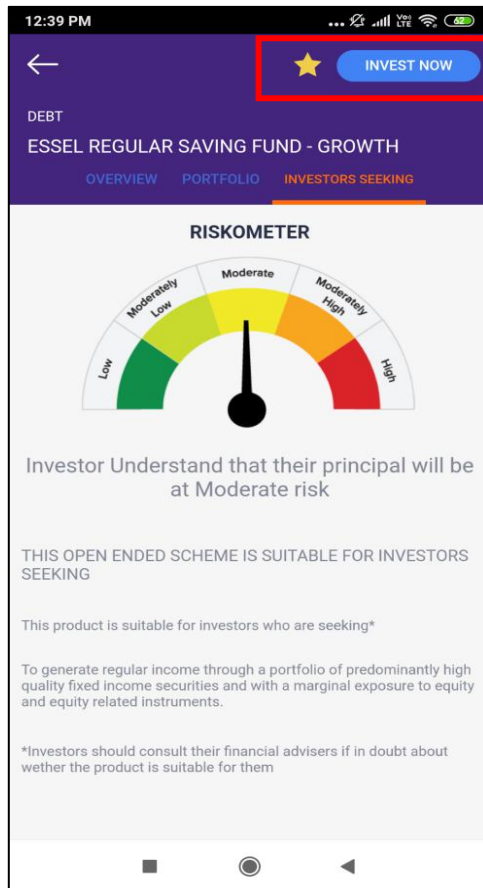
ICICI PRUDENTIAL LONG TERM EQUITY FUND (TAX SAVING) - GROWTH

OVERVIEW PORTFOLIO INVESTORS SEEKING

ISSUERS SECTOR

SECTOR	PORTFOLIO WEIGHT
IT	15.43 %
Bank	13.95 %
Healthcare	8.31 %
FMCG	6.69 %
Power	5.96 %
Automobile & Ancillaries	5.55 %
Non - Ferrous Metals	5.41 %
Miscellaneous	5.35 %
Crude Oil	4.88 %
Telecom	4.86 %
Finance	4.61 %
Infrastructure	3.11 %

**Investor Seeking** - When you click on investors seeking, a Riskometer pictorial depiction of the risk profile of a mutual fund scheme will be shown. It shows the level of risk associated with that scheme. The Riskometer consists of 5 levels: low, moderately low, moderate, moderately high, and high.

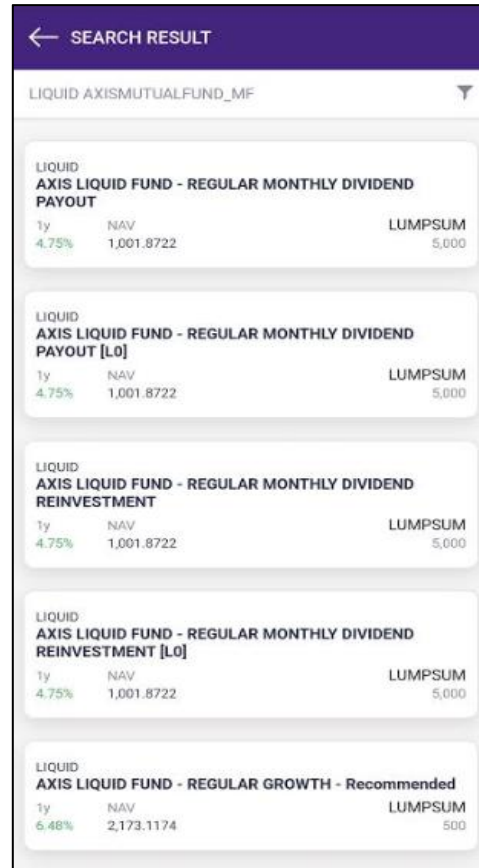
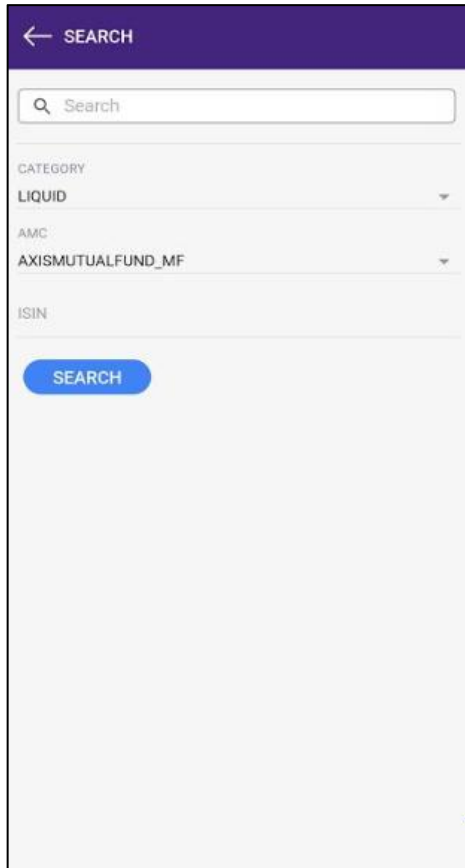


At top of screen When you click on star mark, your scheme will get added in Favourites. And by clicking on invest now you will land on Invest now screen where you can place the order.



## 5. Search

By clicking on search icon on the top menu, you can directly search for a fund. You can apply filter based on fund's category, AMC, ISIN as shown in the image below. And lastly click on SEARCH button.

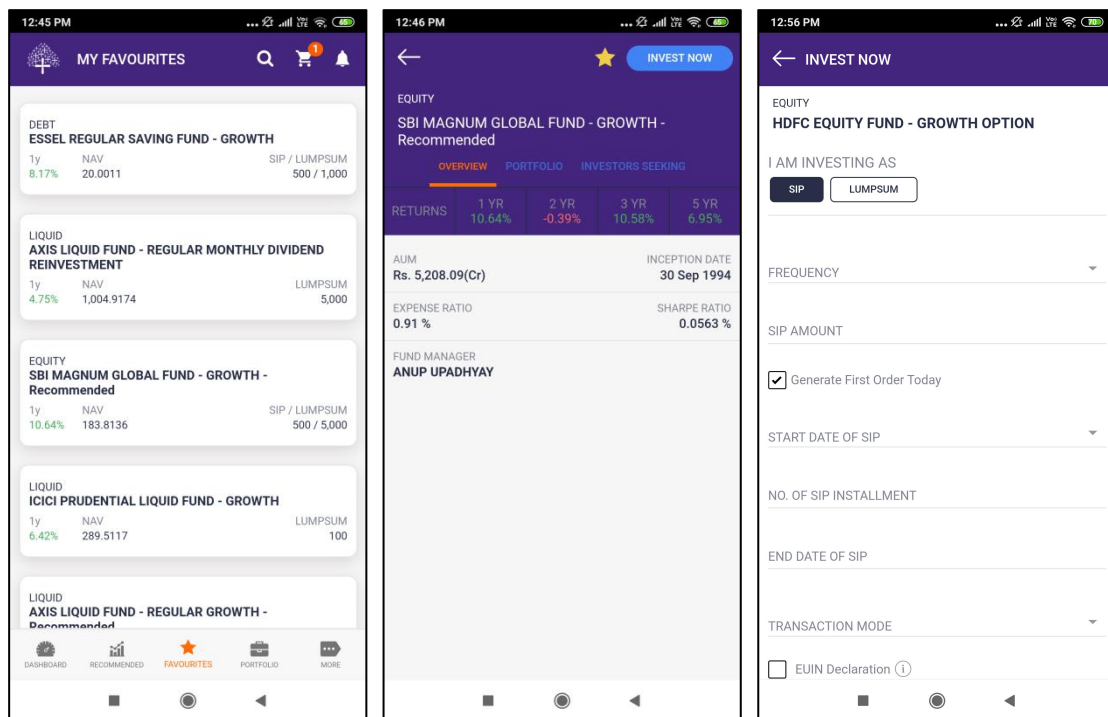


## 6. My Favourites

The funds which you have star marked will get added into your 'Favourite' page. By clicking on fund you will land on overview screen. And you can place the order in that scheme.

**Example :** If you wish to invest in SIP - Select the mode of investment – SIP or Lumpsum, select the frequency, enter the amount you wish to invest, enter start date, No. of SIP Installment, transaction mode.

Read the terms & condition tick the check box & click on Invest.



## 7. Portfolio

You can check the invested funds and their absolute returns on this Portfolio page. Click on the fund, click on the drop down if you wish to make additional investments or redeem a fund, You can also make Switch, Systematic withdrawal plan (SWP) & Systematic transfer plan (STP).

By clicking on details you can see details of the fund w.r.t total amount invested, No. of units, NAV etc.

The screenshot displays a mobile application interface for a portfolio. At the top, the word "PORTFOLIO" is centered. Below it, there are two columns of summary statistics: "ABSOLUTE RETURNS" showing a 3.25% increase and "INVESTED AMOUNT" of Rs. 68,060.11. To the right, "CURRENT AMOUNT" is listed as Rs. 70,269.33. The main content area lists four funds, each with its own set of statistics and action buttons. The third fund, "Axis Liquid Fund - Gr", is highlighted with a red border. Below the fund name, there are six icons representing different actions: Additional Purchase, Redeem, SWP (Systematic Withdrawal Plan), Switch, STP (Systematic Transfer Plan), and Details. At the bottom, a navigation bar contains icons for Dashboard, Recommended, Favorites, Portfolio (which is highlighted), and More.

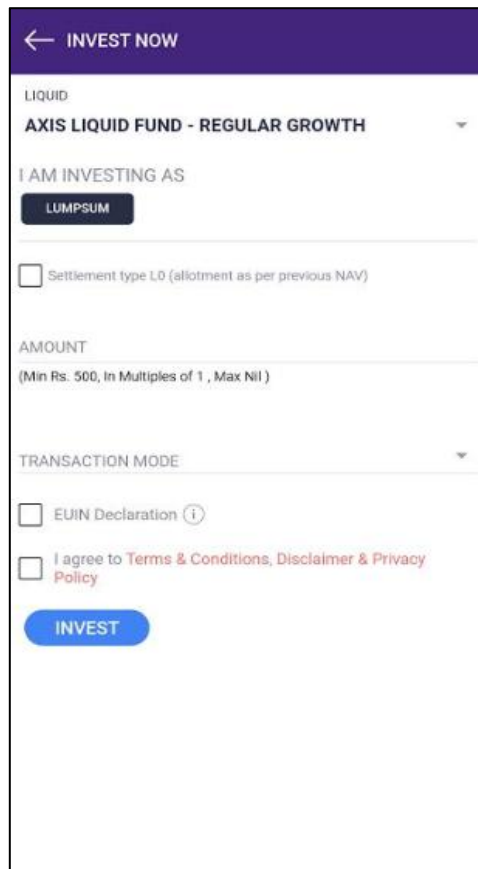
Fund Name	Folio No.	Absolute Returns	Units	Current Amount
Aditya Birla Sun Life Arbitrage Fund - Dividend	1039307232	0.23% ↑ Rs. 2.30	93.078	Rs. 1,006.92
Aditya Birla Sun Life Corporate Bond Fund - Gr	1039307232	1.53% ↑ Rs. 138.16	118.346	Rs. 9,147.31
<b>Axis Liquid Fund - Gr</b>	<b>91052550663</b>	<b>1.52% ↑ Rs. 513.14</b>	<b>15.785</b>	<b>Rs. 34,302.66</b>
ICICI Prudential Bluechip Fund - Gr	13647311/21			

Through Portfolio page, you can make different types of Transactions which is shown below.

## 1. Additional Purchase

### LUMPSUM

It is one time investment you can do in any scheme. Unlike SIP, you can make multiple Lumpsum payments at any point of time.



The screenshot shows a mobile application interface for making an investment. At the top, there is a purple header with a back arrow and the text "INVEST NOW". Below the header, the fund name "LIQUID" and "AXIS LIQUID FUND - REGULAR GROWTH" are displayed. Underneath, there is a section titled "I AM INVESTING AS" with a button labeled "LUMPSUM". A checkbox option is available for "Settlement type L0 (allotment as per previous NAV)". The "AMOUNT" field is present with a note "(Min Rs. 500, In Multiples of 1, Max Nil)". Below this is the "TRANSACTION MODE" section, which includes checkboxes for "EUIN Declaration" and "I agree to Terms & Conditions, Disclaimer & Privacy Policy". At the bottom of the form is a blue button labeled "INVEST".

## SIP (Systematic Investment Plan)

A Systematic Investment Plan (SIP), is a way of investing money in mutual funds, where one invests a fixed amount of money, automatically at periodic intervals. The amount of investment can start with as low as Rs. 100 (depending upon the scheme) and one can choose different frequencies varying from –Daily, weekly, monthly or quarterly.

The screenshot displays a mobile application interface for investing. At the top, there is a purple header with a back arrow and the text "INVEST NOW". Below the header, the category "DEBT" is shown, followed by the selected fund name "ADITYA BIRLA SUN LIFE CORPORATE BOND FU...". Underneath, there is a section titled "I AM INVESTING AS" with two buttons: "SIP" (which is highlighted in dark blue) and "LUMPSUM". The form continues with several input fields: "FREQUENCY", "SIP AMOUNT", "START DATE OF SIP", "NO. OF SIP INSTALLMENT", and "END DATE OF SIP". There is a checkbox labeled "Generate First Order Today" which is checked. Below this is a "TRANSACTION MODE" dropdown menu. At the bottom, there are two checkboxes: "EUIN Declaration" with an information icon, and "I agree to Terms & Conditions, Disclaimer & Privacy Policy". A blue "INVEST" button is located at the very bottom of the form.

## 2. Redemption & Systematic withdrawal plan (SWP)

**Redemption** - Amount is redeemed at the fund's net asset value (NAV) for the day. Once the transaction is completed, clients receive their funds including any returns via direct deposit to their bank account.

**Systematic Withdrawal Plan (SWP)** - Systematic Withdrawal Plan allows you to withdraw a fixed amount from your mutual fund scheme on a preset date every month, quarterly, semiannually or annually as per your needs.

← SWP / REDEEM

LIQUID  
AXIS LIQUID FUND - REGULAR GROWTH - Recommended

I WANT TO

TRANSACTION MODE

SELECT VOLUME

Minimum Redemption  
Minimum Redemption Amount Rs. 0.001. Minimum Redemption Unit 0.

EUIN Declaration ⓘ

I agree to Terms & Conditions, Disclaimer & Privacy Policy

← SWP / REDEEM

LIQUID  
AXIS LIQUID FUND - REGULAR GROWTH - Recommended

I WANT TO

TRANSACTION MODE

FREQUENCY

Generate First Order Today

START DATE

NO. OF INSTALLMENT

END DATE

SELECT VOLUME

Minimum Redemption Amount Rs. 0.001. Minimum Redemption Unit 0.

EUIN Declaration ⓘ

I agree to Terms & Conditions, Disclaimer & Privacy Policy

### 3. Switch & Systematic transfer plan (STP)

**Switch** - Switch refers to the process of transferring investments from one scheme to another. It is shifting a portion of or the entire investment from one scheme to another.

**Systematic Transfer Plan (STP)** - In Systematic Transfer Plan (STP) method of investing an investor transfers a fixed amount of money from one category of fund to another in a fixed interval.

**For example:** You can shift from a debt fund to an equity fund.

The image displays two screenshots of a mobile application interface for the 'STP / SWITCH' feature, specifically for the 'Axis Liquid Fund - Gr'.

**Left Screenshot:**

- Header: STP / SWITCH
- Note: Transfer within schemes of same fund house
- Fund Name: Axis Liquid Fund - Gr
- I WANT TO DO: STP (selected), SWITCH
- TRANSFER TO SCHEME: [Dropdown]
- SELECT VOLUME: [Dropdown]
- EJIN Declaration ⓘ
- I agree to Terms & Conditions, Disclaimer & Privacy Policy
- PROCESS (button)

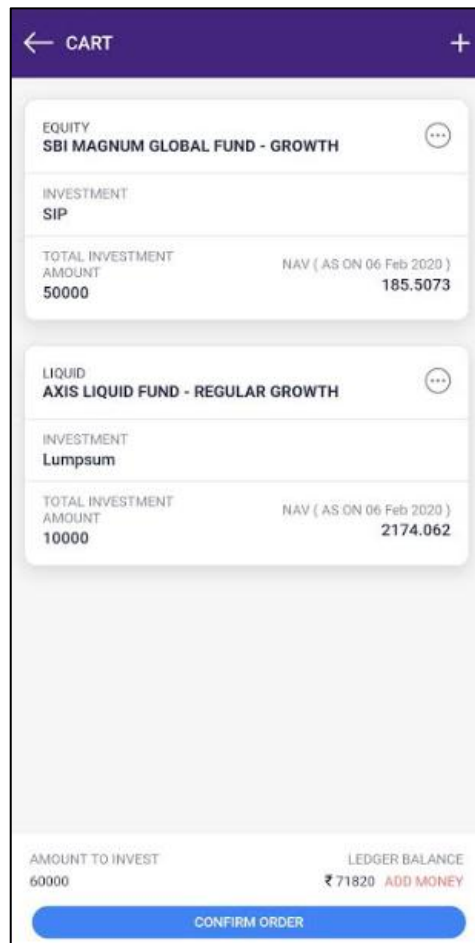
**Right Screenshot:**

- Header: STP / SWITCH
- Fund Name: Axis Liquid Fund - Gr
- I WANT TO DO: STP, SWITCH (selected)
- TRANSFER TO SCHEME: [Dropdown]
- AMOUNT: [Input]
- FREQUENCY: [Dropdown]
- Generate First Order Today
- START DATE: [Dropdown]
- NO. OF INSTALLMENT: [Input]
- END DATE: [Input]
- Min. Redemption Amt. for Switch-Out Scheme : 0.00
- EJIN Declaration ⓘ
- I agree to Terms & Conditions, Disclaimer & Privacy Policy
- PROCESS (button)

## 8. Cart

You can view all the funds added by you in the cart after which to transact all you have to do is confirm the order.

It allows you to buy multiple schemes at a time and track them. You can also edit and delete schemes from the cart by clicking on the detail icon. You can add schemes to cart directly by clicking on the + icon

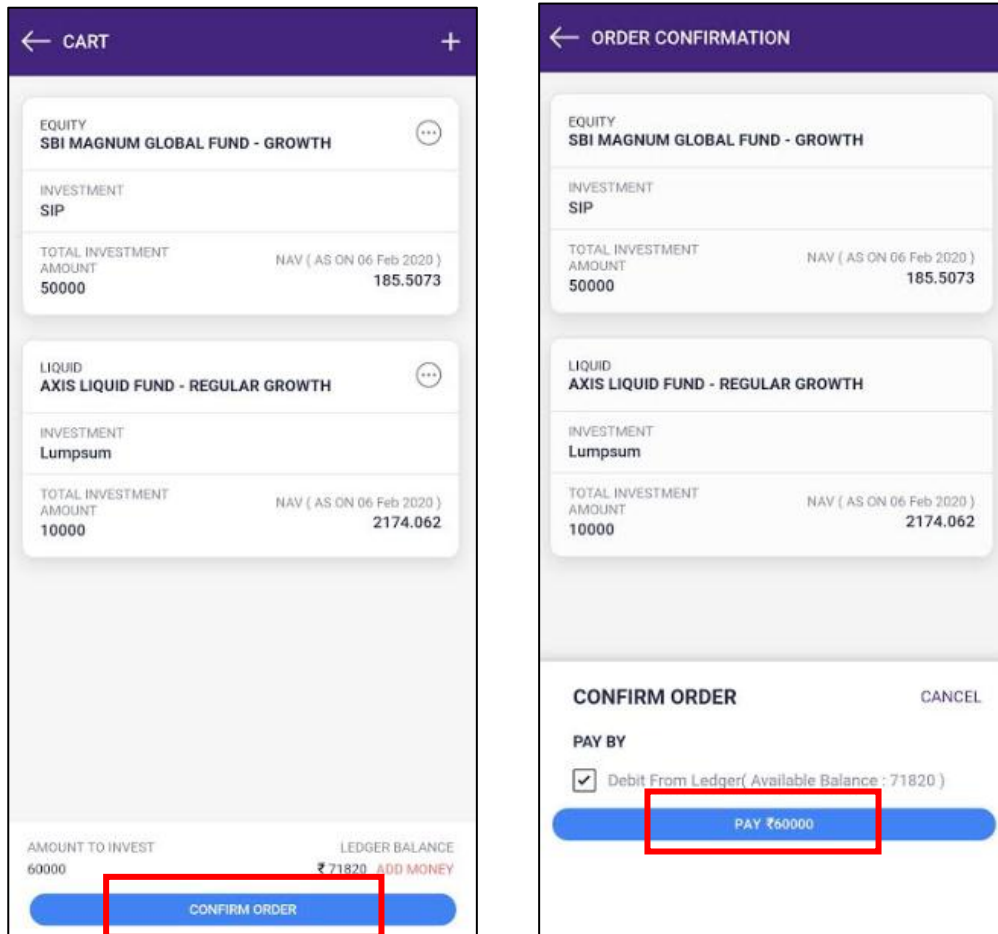


You need to click on Confirm Order button for order processing.



## 9. Order Confirmation

Given below is Order Confirmation where by you can confirm the order either by using your ledger balance or in case of insufficient balance, you can add money to ledger using ADD MONEY through Payment Gateway.

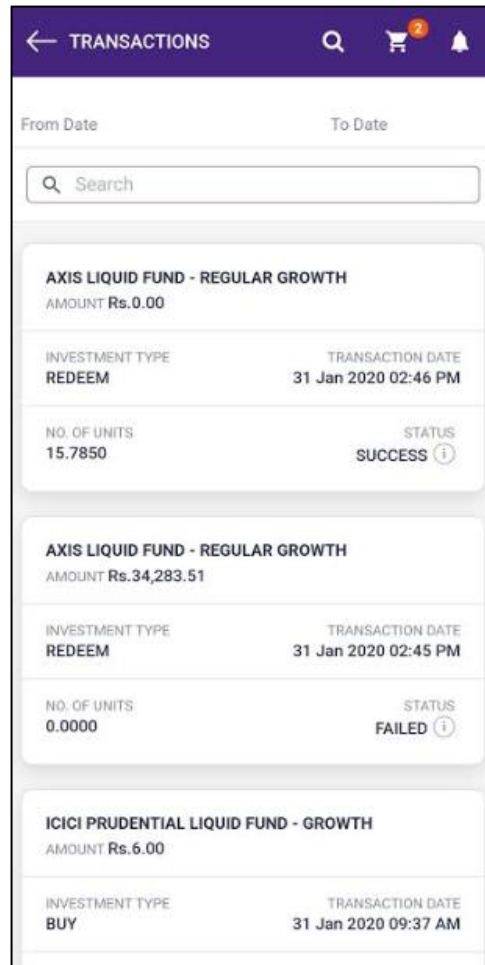


For order confirmation you have to click on the confirm order button.

You can see your order status on Transactions page.

## 10. Transactions

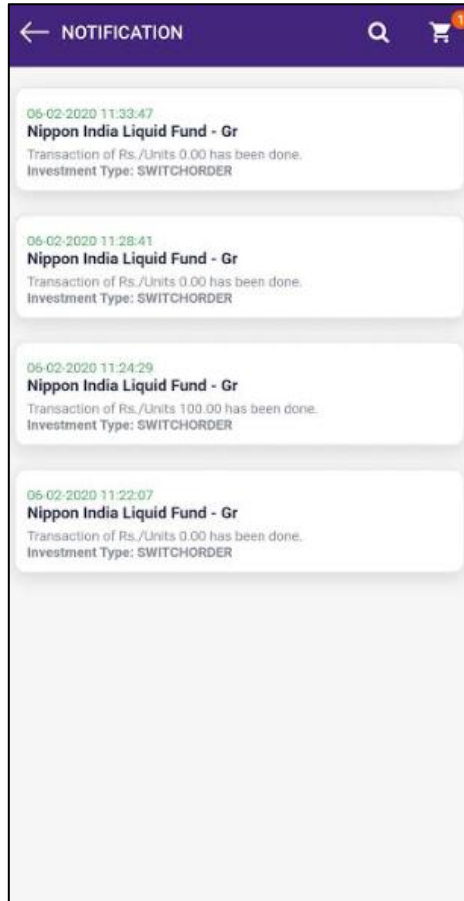
You can easily track the status of your pending orders from Transaction page.



Here on this transaction page, you can also select the date range and see the transactions of those specific days.

## 11. Notification

You can view all the notifications related to your Mutual funds orders.



## 12. More

By clicking on More, a menu bar will be displayed.

1. **NFO** - By clicking on NFO you can check all the NFO's listed.
2. **Transactions** - You can view the transaction history of Mutual fund till date
3. **My Profile** - You can view the profile details on this screen i.e Name, address, mobile number, nominee & bank details etc
4. **Add Money** - By clicking on add money you can add fund to your account.
5. **Contact Us** - You can contact ACMIL by calling our Customer Care on 022-2858-4444

OR

Write your grievance or query on [customerservice@acm.co.in](mailto:customerservice@acm.co.in)

6. **Back to equity** - When you click on back to equity you will land on trading screen i.e Dashboard
7. **Signout** - You can signout from the app by clicking on Signout.

