

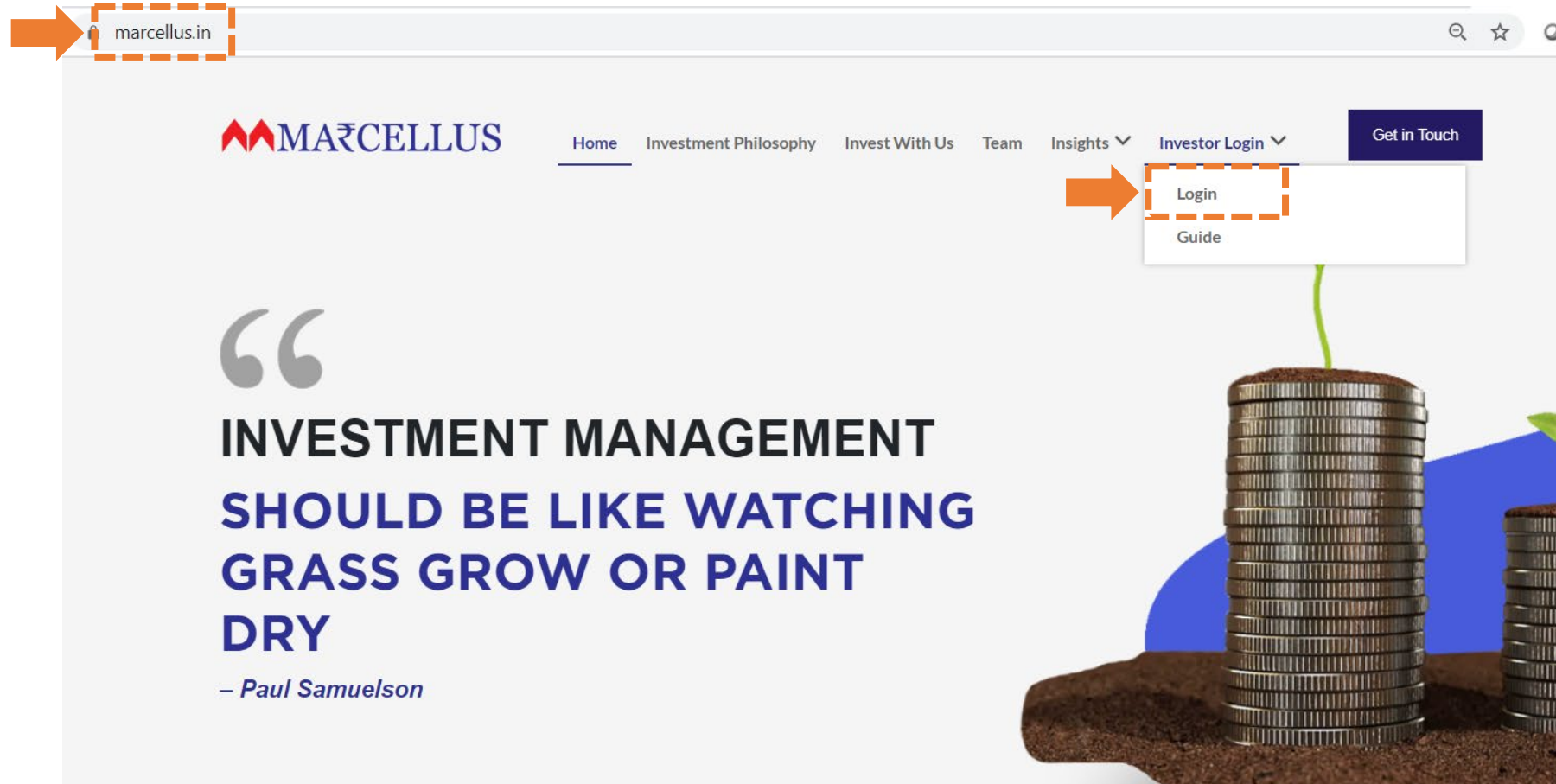


Access Your Portfolio Reports Online at

<https://clients.marcellus.in/>

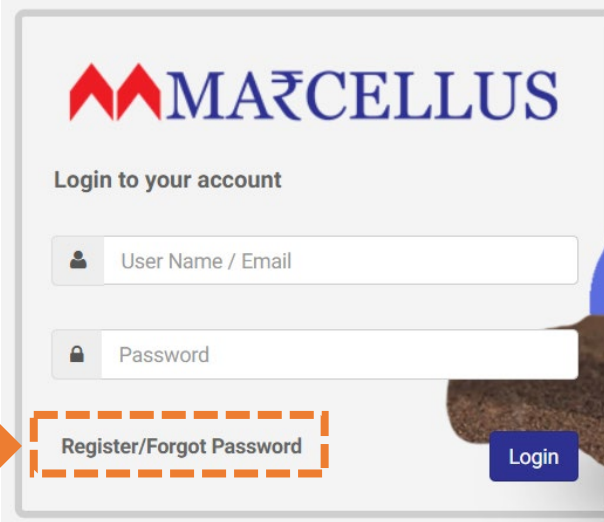
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To Register, visit <https://www.marcellus.in> & Click the 'Investor Login > Login' Button



2

Click 'Register/Forgot Password' Button



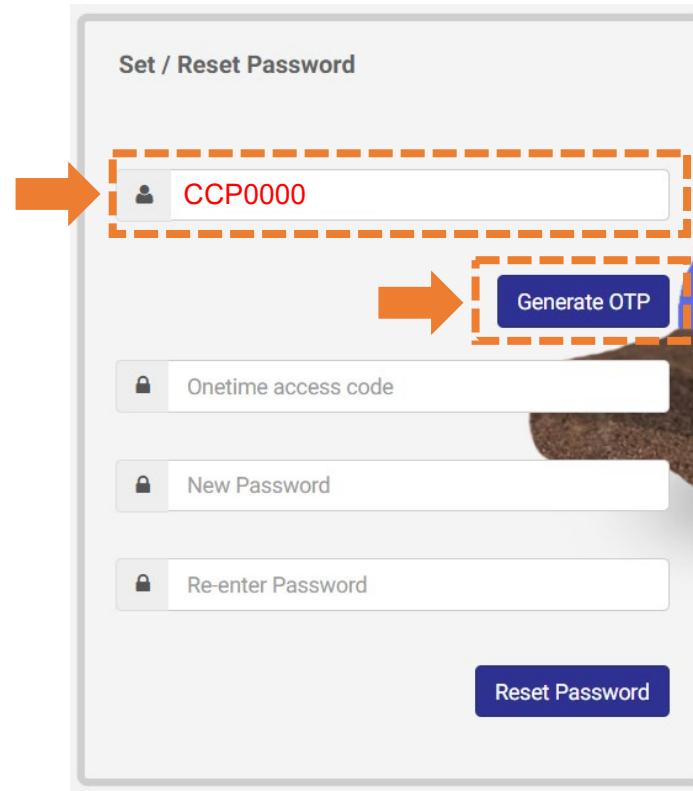
The screenshot shows the Marcellus login interface. At the top is the Marcellus logo, consisting of three red upward-pointing triangles followed by the word "MARCELLUS" in blue. Below the logo is the text "Login to your account". There are two input fields: "User Name / Email" and "Password". At the bottom left, a button labeled "Register/Forgot Password" is highlighted with a dashed orange border and an orange arrow pointing to it from the left. At the bottom right, there is a blue button labeled "Login".

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Your User Name is your Marcellus PMS Account Number (e.g. ABC1234). This is a seven digit alphanumeric code and can be found on your monthly portfolio statement. If you don't have this, please send us an email on clientsupport@marcellus.in from your registered email id with your PMS account, and we will be happy to share this.

Enter the PMS Account Number in User Name field and Click 'Generate OTP' Button

Note: User Name is case sensitive



The screenshot shows a web form titled "Set / Reset Password". It contains several input fields and buttons. The first field, labeled "User Name" (indicated by a person icon), contains the text "CCP0000" and is highlighted with a dashed orange border. An orange arrow points to this field from the left. Below it is a "Generate OTP" button, also highlighted with a dashed orange border and an orange arrow pointing to it from the left. Further down are three more input fields: "Onetime access code", "New Password", and "Re-enter Password", each with a lock icon on the left. At the bottom right of the form is a "Reset Password" button.

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You will receive OTP on your email address registered with Marcellus PMS account. Enter this in 'onetime access code' window

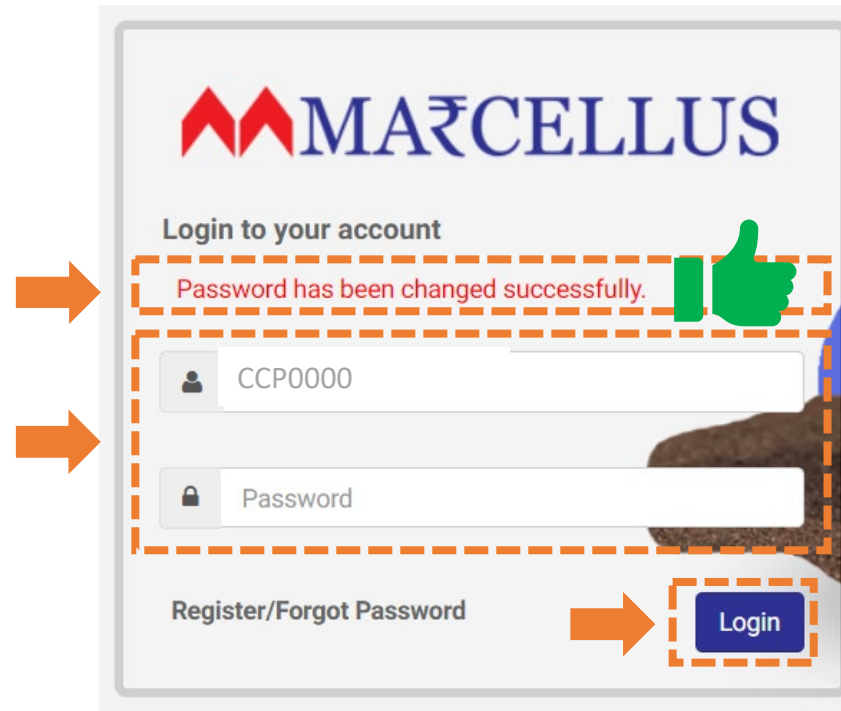
Enter (and re-enter) the new password of your choice (at least 8 digit long with mix of alphabets, numbers and special characters)

- at least 8 characters long
- at least 1 number AND
- at least 1 special character

The screenshot shows a web form titled "Set / Reset Password". At the top, there is a text input field containing "CCP0000" with a user icon on the left. To the right of this field is a blue button labeled "Generate OTP". Below this, there are three password-related input fields, each with a lock icon on the left: "Onetime access code", "New Password", and "Re-enter Password". These three fields are enclosed in a dashed orange border. To the right of the "New Password" field, there is a blue button labeled "Reset Password". An arrow points from the "Reset Password" button to the right. On the left side of the form, there are three orange arrows pointing towards the "Onetime access code", "New Password", and "Re-enter Password" fields. A thought bubble on the left contains the password requirements listed in the adjacent text block.

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Upon successful registration, you will see the message 'Password changed successfully'. Use this password with your PMS Account Number to log into the portal



Frequently Asked Questions (FAQs)

- I have not received the OTP
 - Please check your Junk / Spam folder. Occasionally, the OTP may be filtered to these folders.
 - Please ensure you use correct PMS Account code to generate OTP and check the corresponding email inbox.
- I received the OTP and on entering the new password, an error message states that the password should not be blank.
 - In this case, please try it on a different browser.
- Can you please unlock my account?
 - The system will unlock your access to online portal after 90 minutes if your account is locked due to incorrect password attempts.

- Dashboard
- Portfolio
- Performance
- Allocations
- Transactions
- Reports
- Market Commentary
- Statements and Documents

Dashboard

As of 31/12/2019

₹7,593,013

Assets

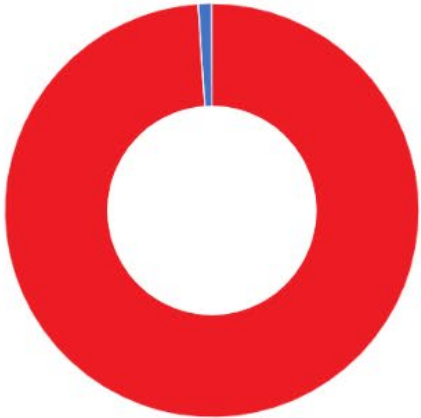
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Strategies

1

Accounts

Asset Allocation



	Asset Class	Assets ₹	%
■	Equity	7,552,188	98.94%
■	Cash and Equivalent	80,954	1.06%

Accounts

Account	Type	Strategy	Distributor	Inception Date	Portfolio Value ₹	Return Summary
CCP0000	Discretionary	Consistent Compounders Portfolio		14/02/2019	7,593,013	TWRR ⓘ
Total					7,593,013	8

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A wealth of information about your portfolio is available to you. Note that portfolio data is **not live**, and is updated at midnight of every working day.

High Level Portfolio Information

Detailed Portfolio Information

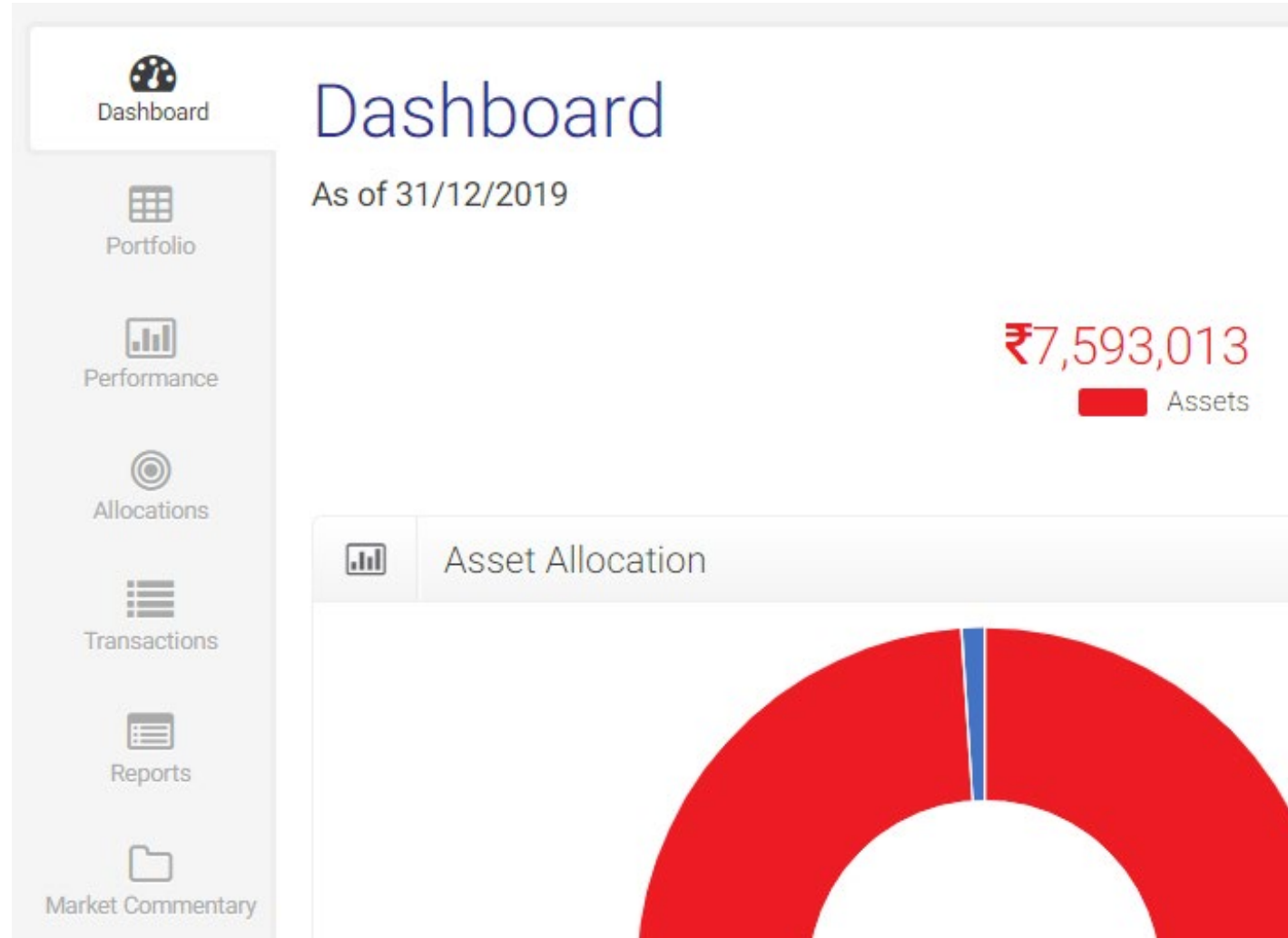
Performance Stats & Charts

Sector Allocations

Detailed Transactions

Downloadable Reports

Newsletters / Webinars etc



Key Reports available for Consistent Compounders Portfolio

- **Portfolio Fact Sheet:** One pager portfolio snapshot with current holdings and performance against benchmarks
- **Performance Appraisal & Portfolio Performance Summary:** To check your portfolio performance since inception
- **Current Portfolio:** Detailed portfolio snapshot that includes stock-wise positions, gains / losses, expenses, rate of return etc.
- **Statement of Capital Gain/Loss:** Realised short / long term gains and losses – your accountant might need it
- **Capital Register:** Transaction wise details of your contribution and redemptions
- **Transaction Statement:** List of all transactions in your account

ClientSupport@marcellus.in