Access Your Portfolio Reports Online at

https://clients.marcellus.in/

The portal is best viewed on Laptop / PC. We recommend using latest version of Google Chrome browser. When viewed on a mobile device, some of the windows may not fit / scrolling may not work.
To Register, visit https://www.marcellus.in & Click the ‘Investor Login > Login’ Button

"INVESTMENT MANAGEMENT SHOULD BE LIKE WATCHING GRASS GROW OR PAINT DRY"
– Paul Samuelson
Click ‘Register/Forgot Password’ Button
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
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
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
  o Please check your Junk / Spam folder. Occasionally, the OTP may be filtered to these folders.
  o 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.
  o In this case, please try it on a different browser.

• Can you please unlock my account?
  o The system will unlock your access to online portal after 90 minutes if your account is locked due to incorrect password attempts.
A snapshot of portfolio dashboard

Dashboard
As of 31/12/2019

Assets

<table>
<thead>
<tr>
<th>Asset Class</th>
<th>Assets ₹</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equity</td>
<td>7,552,188</td>
<td>98.94%</td>
</tr>
<tr>
<td>Cash and Equivalent</td>
<td>80,954</td>
<td>1.06%</td>
</tr>
</tbody>
</table>

Accounts

<table>
<thead>
<tr>
<th>Account</th>
<th>Type</th>
<th>Strategy</th>
<th>Distributor</th>
<th>Inception Date</th>
<th>Portfolio Value ₹</th>
<th>Return Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>CCP0000</td>
<td>Discretionary</td>
<td>Consistent Compounding Portfolio</td>
<td></td>
<td>14/02/2019</td>
<td>7,593,013</td>
<td>TWRR</td>
</tr>
</tbody>
</table>

The portal is best viewed on Laptop / PC. We recommend using the latest version of Google Chrome browser. When viewed on a mobile device, some of the windows may not fit / scrolling may not work.
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.

The portal is best viewed on Laptop / PC. We recommend using latest version of Google Chrome browser. When viewed on a mobile device, some of the windows may not fit / scrolling may not work.
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