

Invest in US equities

What is it?

New invest in US markets with over 3,500+ US stocks and ETFs. An opportunity to ride the growth wave of highly desired FAANG (Facebook, Apple, Amazon, Netflix & Google) stocks in addition to JP Morgan Chase, Tesla, etc.

Key Highlights

- **Seamless digital account opening** - User to open a separate KYC for US investing this will be 100% Digital process. Require separate credentials to start investment.
- **Account activation** - Account will get activated in 2 days post documents are approved
- **No Minimum Investment** - Start investing with any amount.
- **Invest in Fractional stocks** - Build a diversified portfolio with limited capital by buying fractional quantities of a single stock.
- **Thematic Investments** - Preconfigured portfolios of high-growth Stocks & global ETFs.
- **Remittance support** - Streamlined process for transferring Funds in US Dollars. Money remittance for investment can be done through your existing MOSL or any other bank account.
- **Limit on foreign Remittance** thus you can't invest more than \$2,50,000 in a year

Brokerage Plan

- **Lite Plan** - 0.50% subject to a minimum of \$0.02 per share - Whichever is higher
 - **Premier Plan** - 0.25% subject to a minimum of \$0.01 per share - Whichever is higher.
- ₹10,000 annual subscription fees applicable.

Illustration:

	Price	Qty	Trade Value	Commission	
				Lite	Premier
Trade 1	1,500	5	7,500	37.5	18.8
Trade 2	2	395	790	7.9	4.0
Trade 3	3,100	0.2	620	3.1	1.6

Trade 1

Lite	Premier
Brokerage @0.50% =1500*5*0.50%=\$37.5 Brokerage @\$0.02 per share =5*\$0.02=0.10 The brokerage of \$37.5 would be considered	Brokerage @0.25% =1500*5*0.25%=\$18.75 Brokerage @\$0.01 per share =5*\$0.01=0.05 The brokerage of \$18.75 would be considered

Trade 2

Lite	Premier
Brokerage @0.50% =2*395*0.50%=\$3.95 Brokerage @\$0.02 per share =395*\$0.02=\$7.90 The brokerage of \$7.9 would be considered	Brokerage @0.25% =2*395*0.25%=\$1.98 Brokerage @\$0.01 per share =395*\$0.01=\$3.95 The brokerage of \$3.95 would be considered

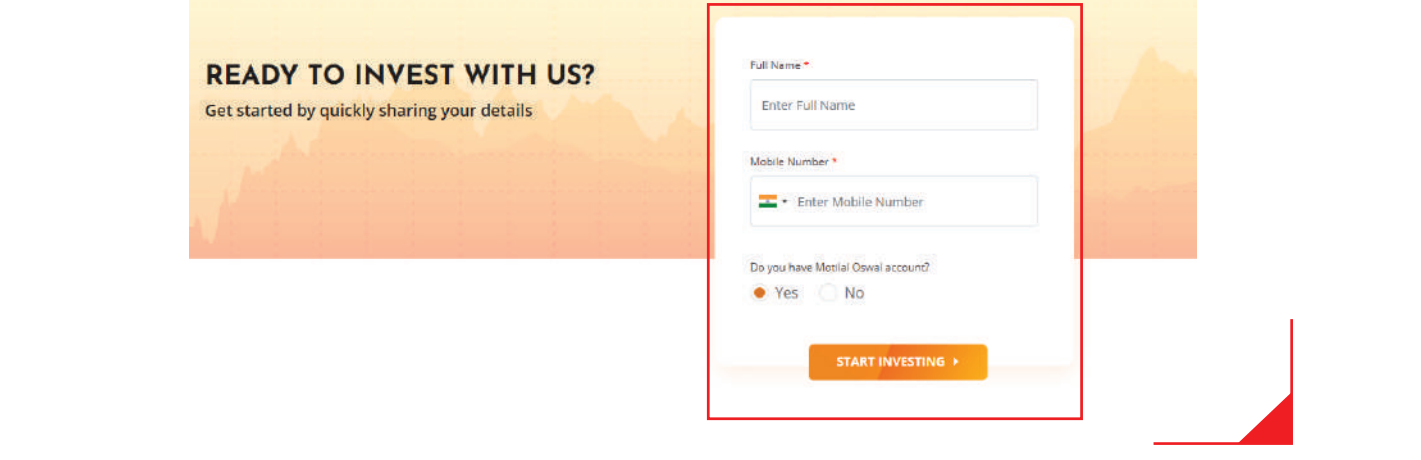
Trade 3

Lite	Premier
Brokerage @0.50% =3100*0.2*0.50%=\$3.10 Brokerage @\$0.02 per share =0.2*\$0.02=\$0.00 The brokerage of \$3.1 would be considered	Brokerage @0.25% =3100*0.2*0.25%=\$1.55 Brokerage @\$0.01 per share =0.2*\$0.01=\$0.00 The brokerage of \$3.95 would be considered

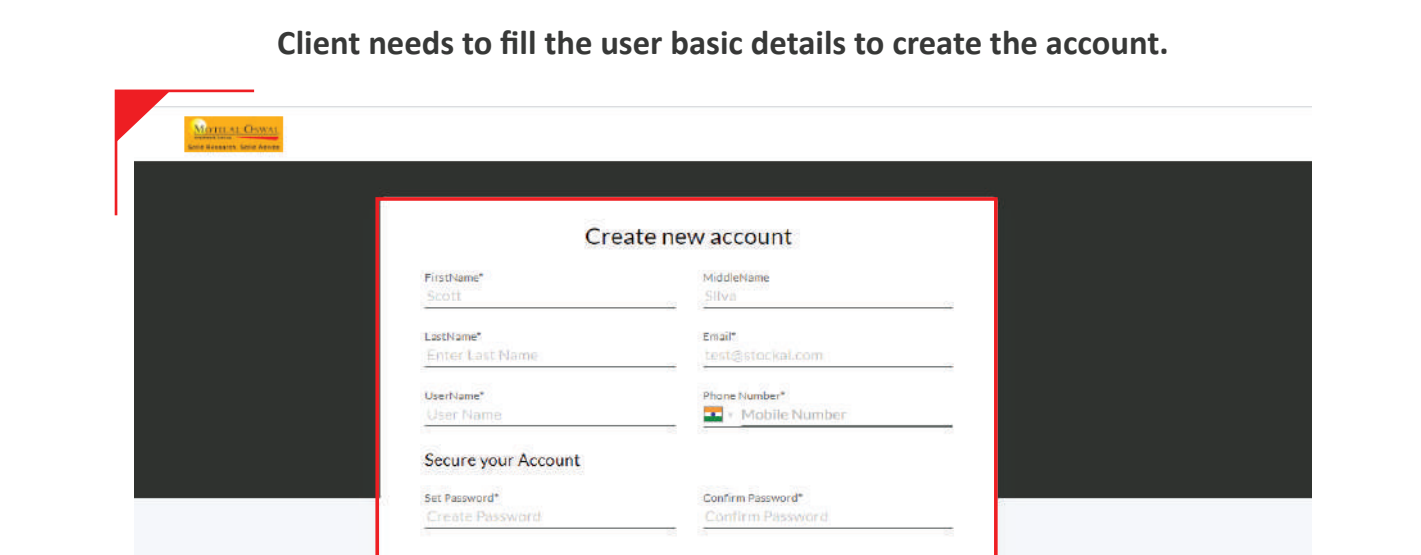
View Taxation related FAQs

How to access?

- Visit – www.motilaloswal.com or Login in **MO investor App**
- Click on "Invest in US Equities" under **Help Me Invest** section in **Web & Invest Now** menu in **App**



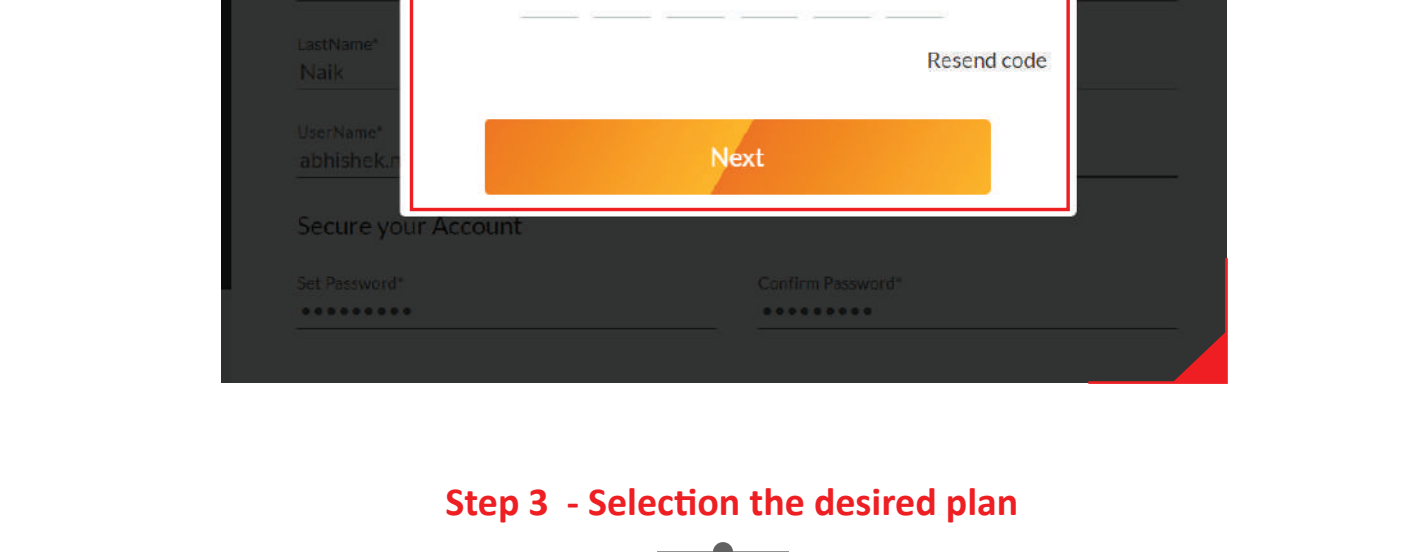
On clicking on 'Invest in US stocks' user would be redirected Investing page



- Client would have two option on Landing to proceed Start Investing and LOGIN.
- If the user is already registered click on "Login" and in case of new User click on "Start Investing"

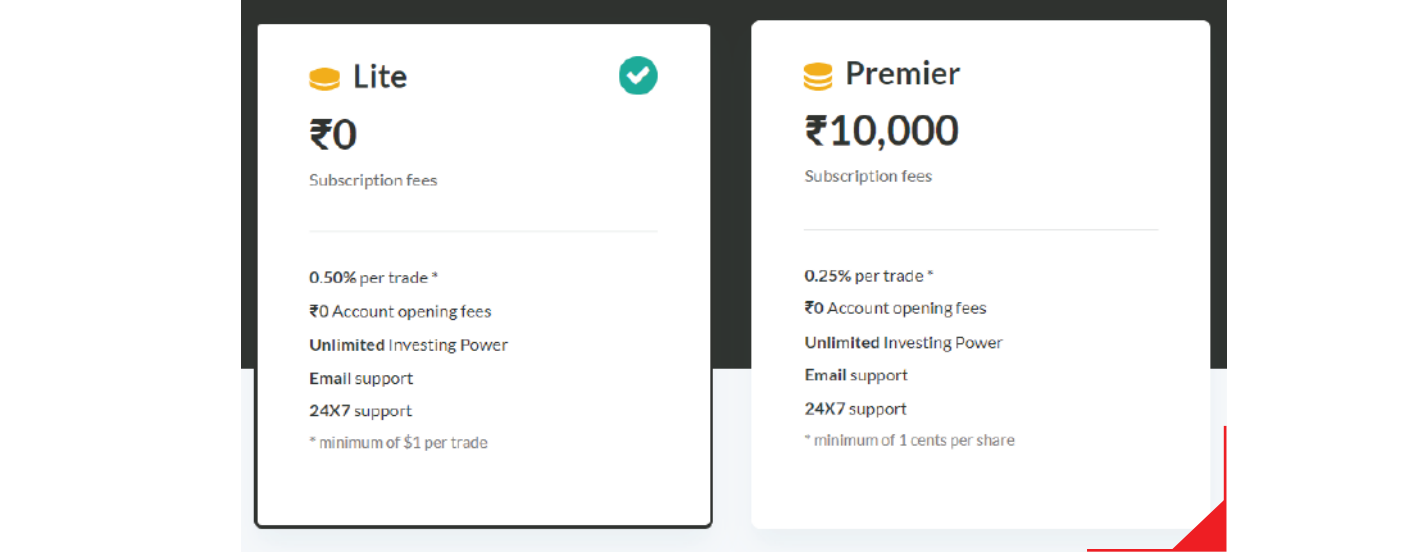
New User Journey- Start Investing

Click on "Start Investing" - Enter the basic details (Name and Mobile Number) - Process is same for App & Web



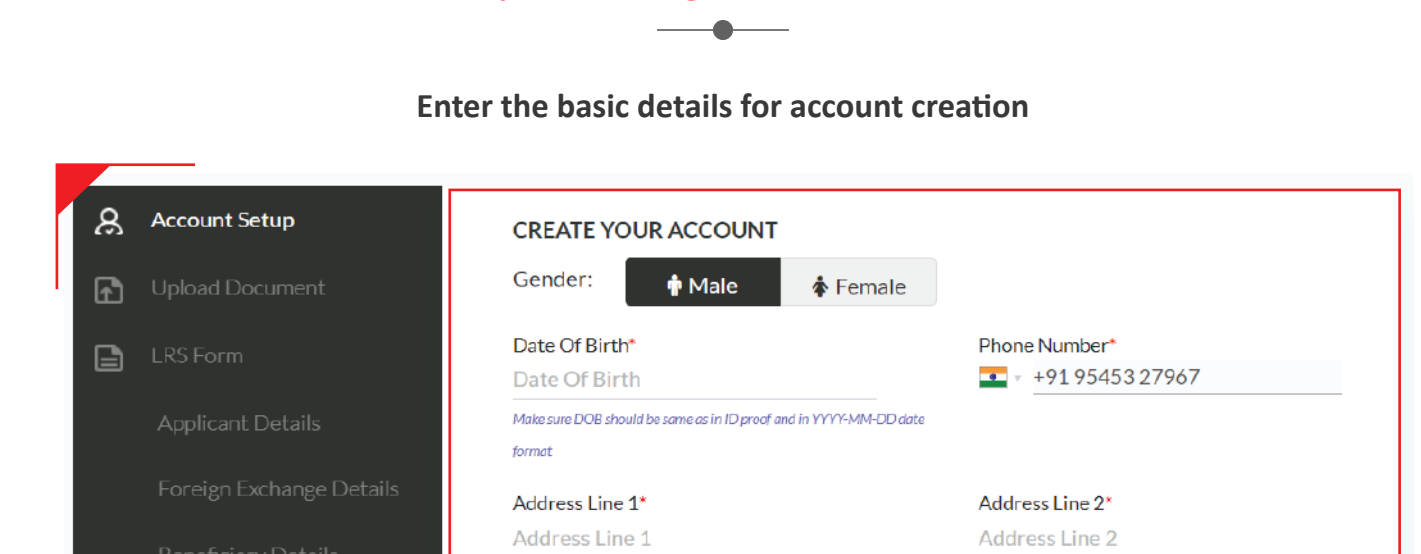
Step 1 - Signup

Client needs to fill the user basic details to create the account.



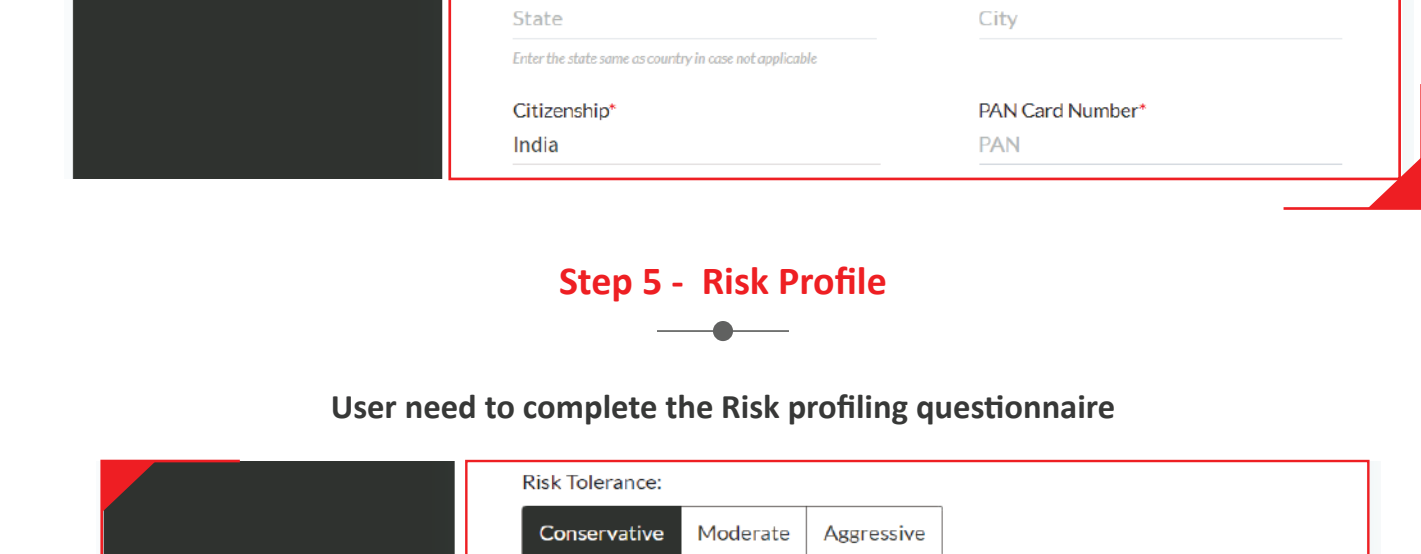
Step 2 - OTP Verification

Post filling the credentials user have to enter the OTP received on his registered Email id.



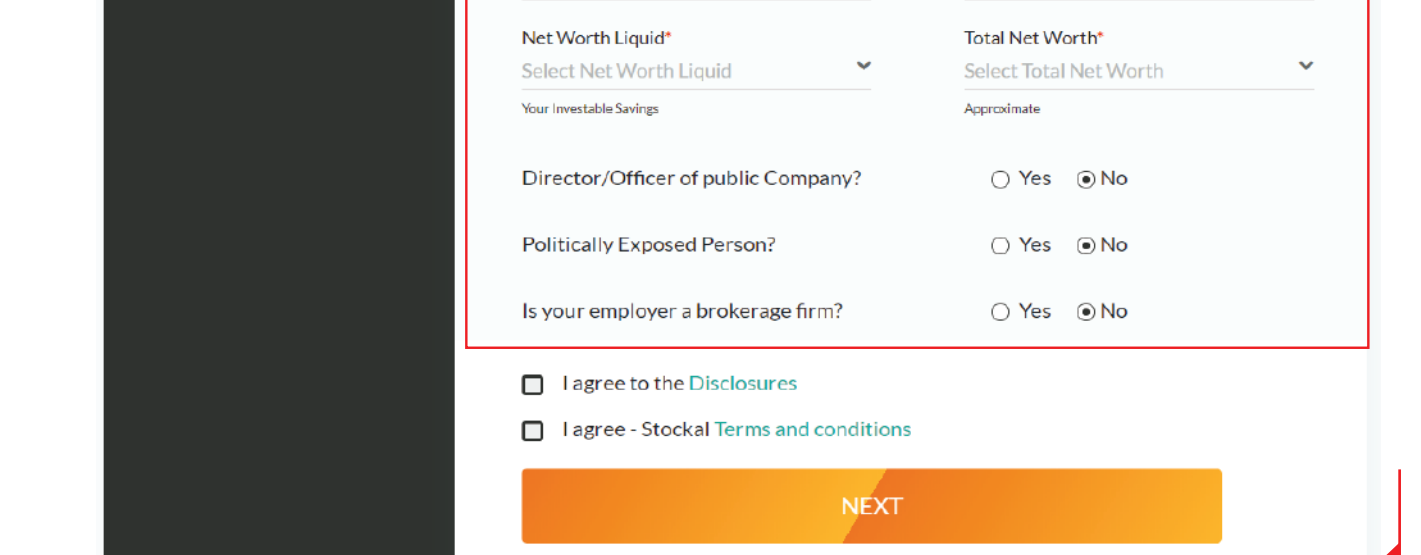
Step 3 - Selection the desired plan

Payment can be done through UPI gateway



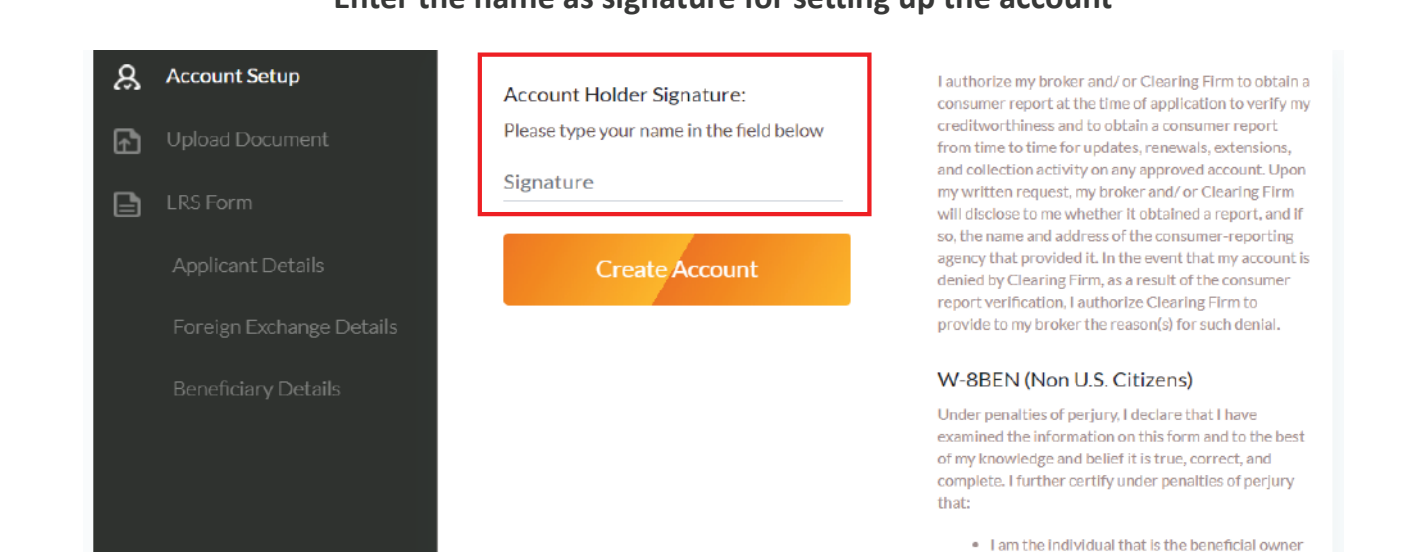
Step 4 - Trading Account creation

Enter the basic details for account creation



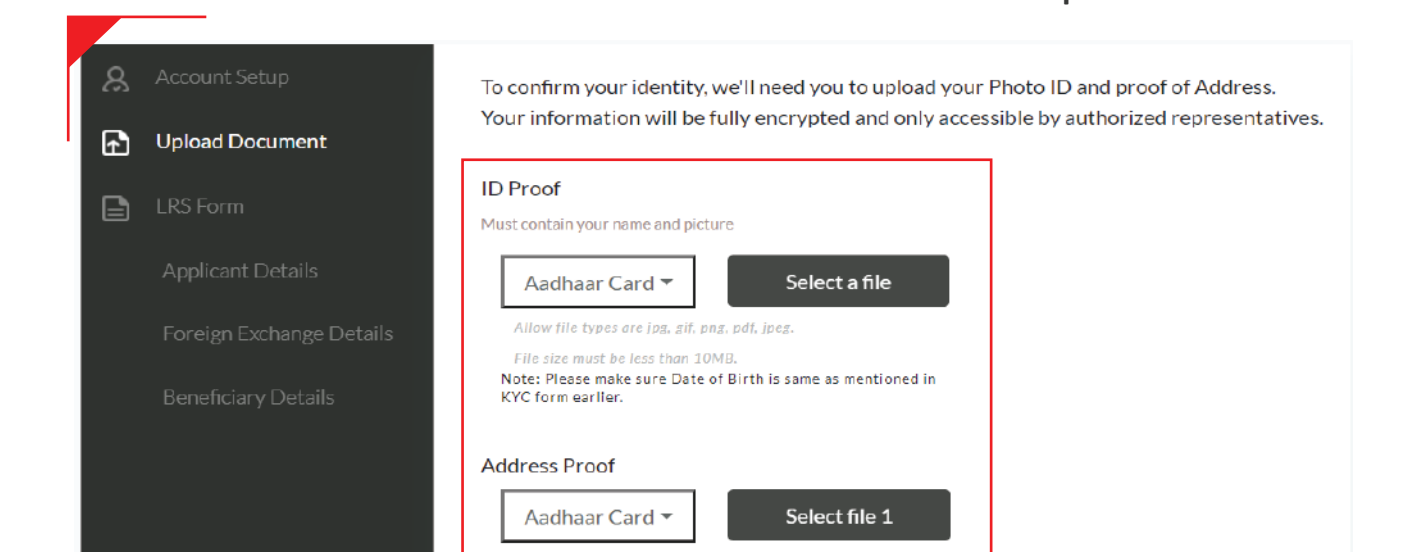
Step 5 - Risk Profile

User need to complete the Risk profiling questionnaire



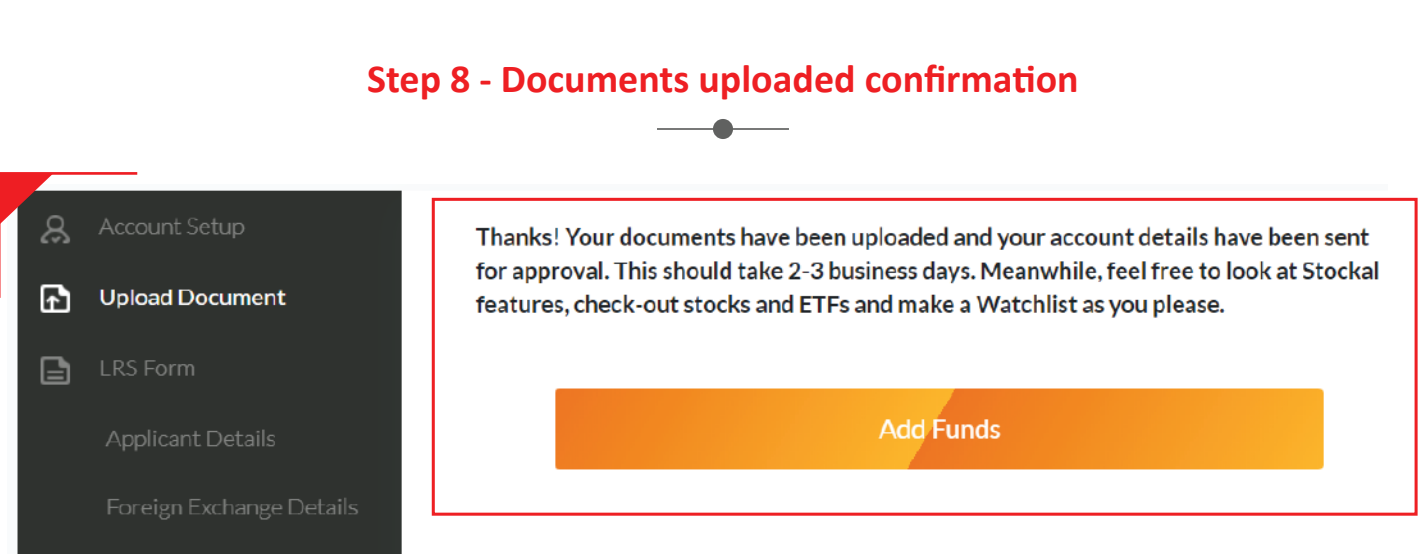
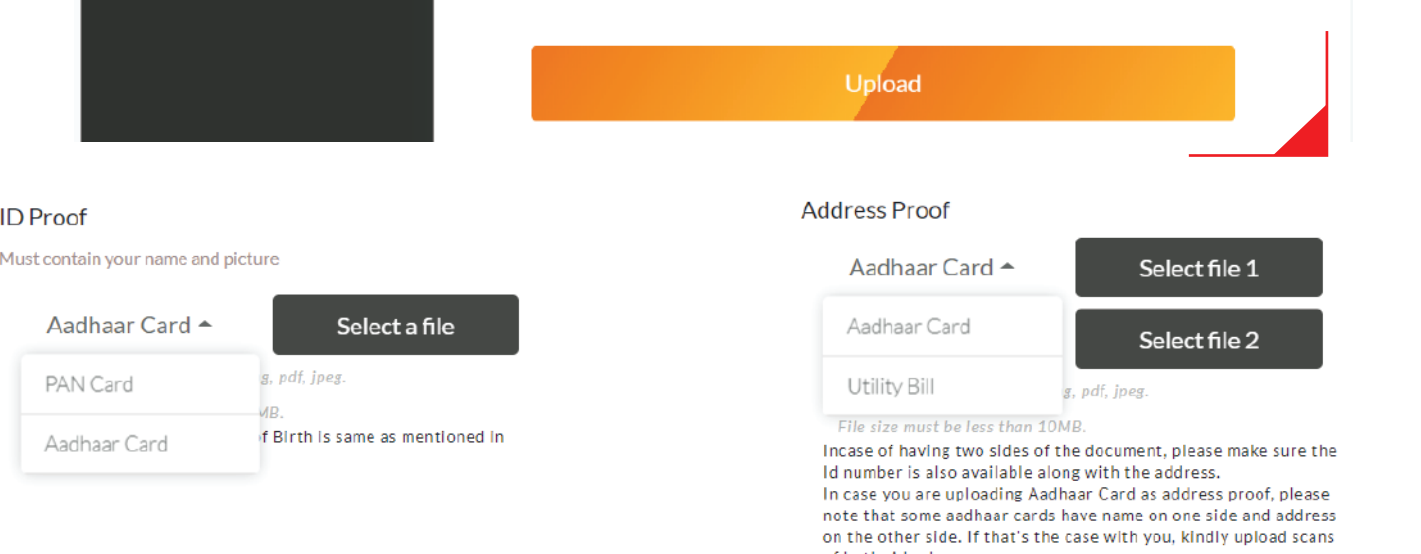
Step 6 - Account setup

Enter the name as signature for setting up the account

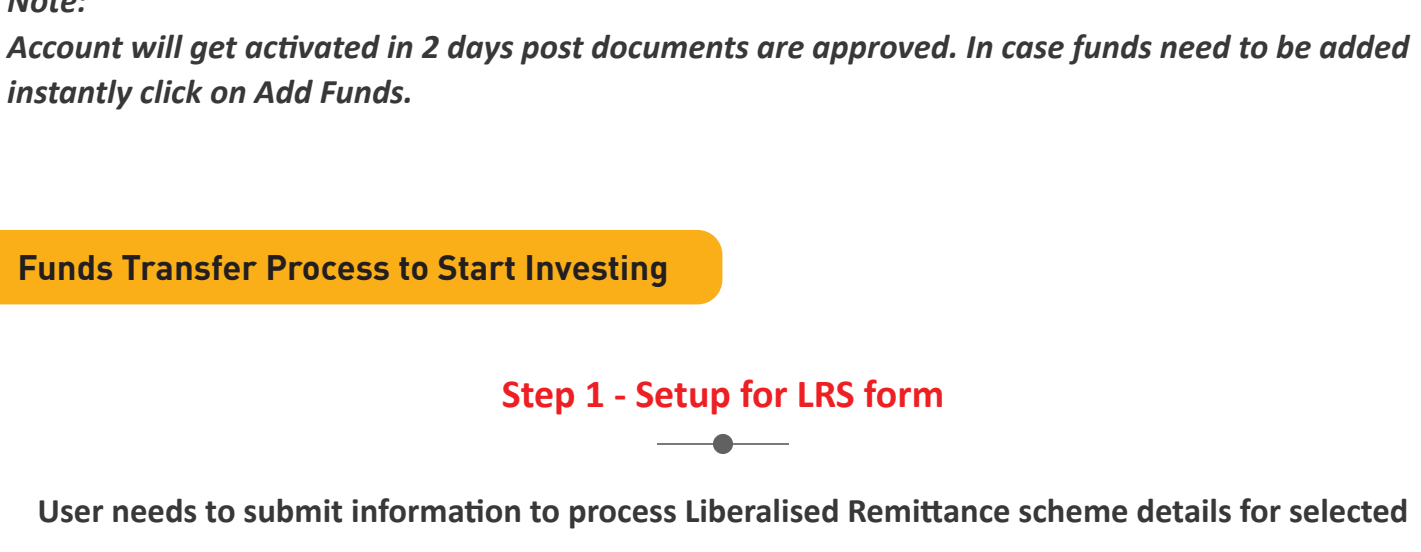


Step 7 - Documents upload

User need to submit his Aadhaar card or Pan card as proof



Step 8 - Documents uploaded confirmation

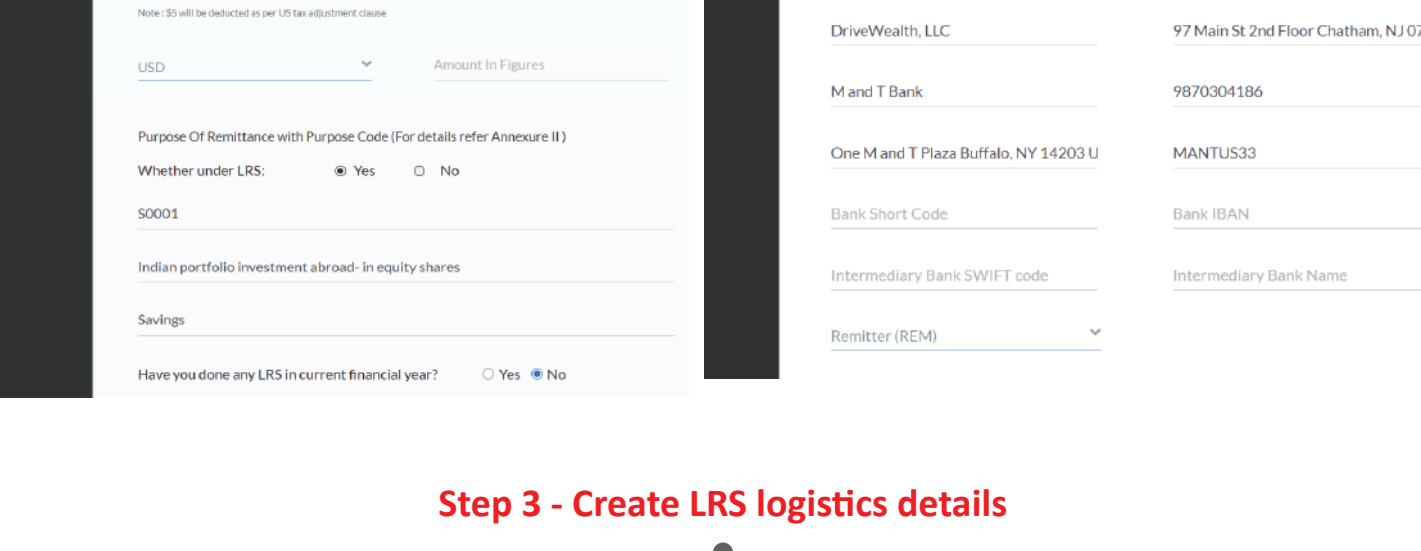
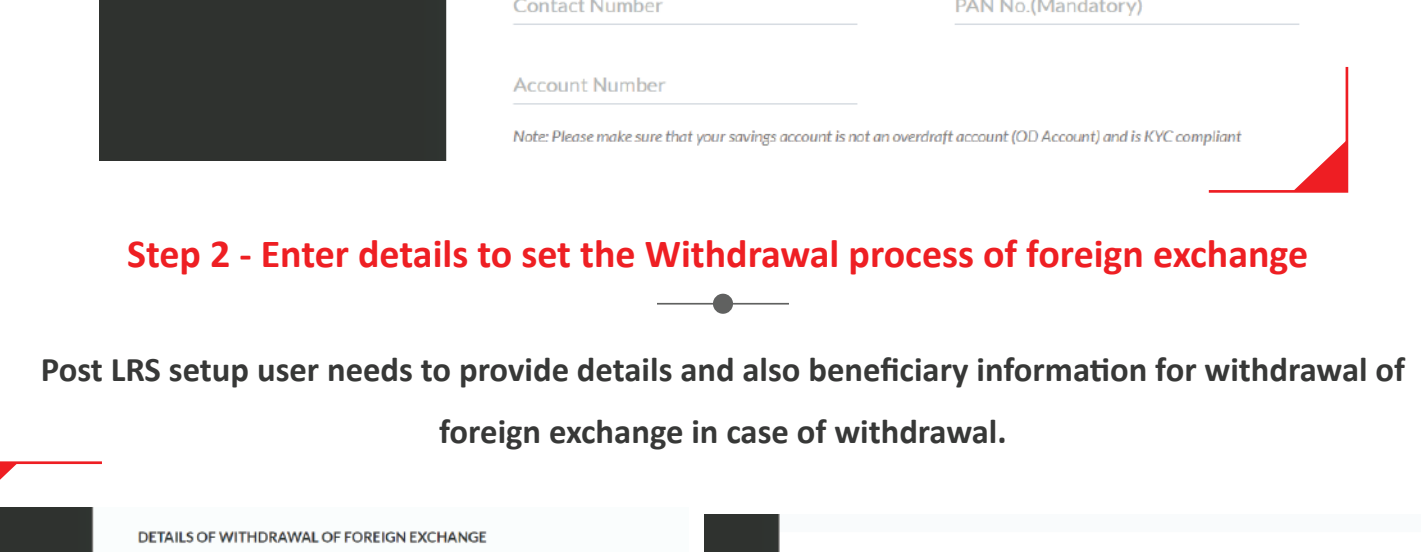


Note: Account will get activated in 2 days post documents are approved. In case funds need to be added instantly click on **Active Funds**.

Funds Transfer Process to Start Investing

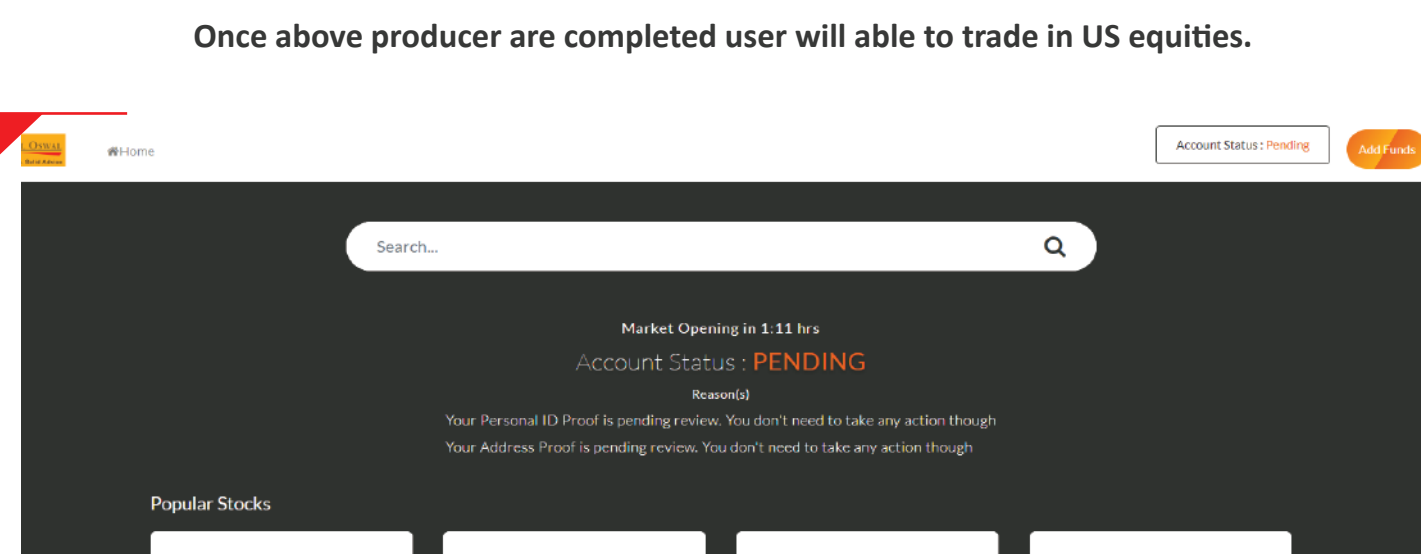
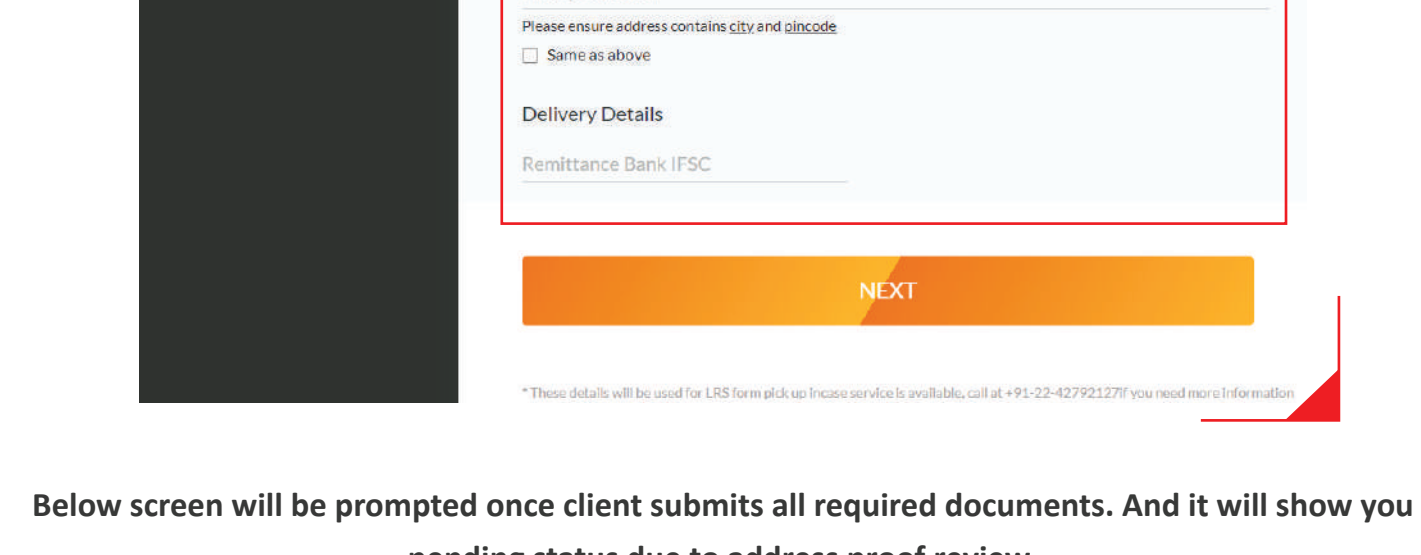
Step 1 - Setup for LRS form

User needs to submit information to process Liberalized Remittance scheme details for selected bank and also details of applicant to carry out foreign exchange transaction.



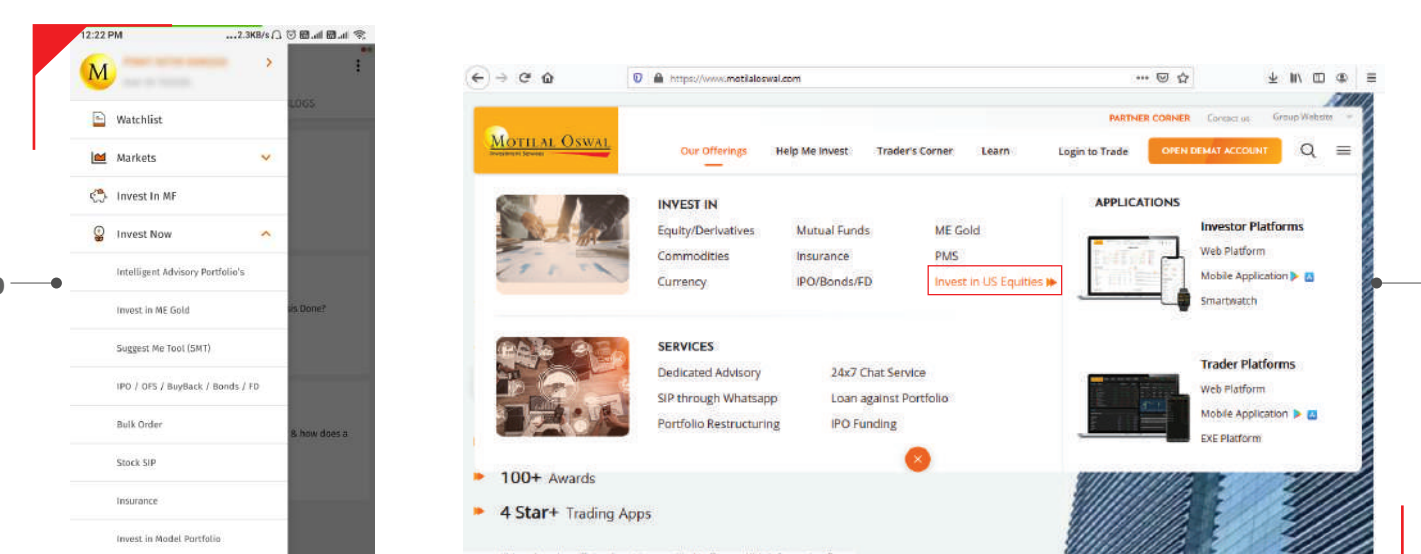
Step 2 - Enter details to set the Withdrawal process of foreign exchange

Post LRS setup user needs to provide details and also beneficiary information for withdrawal of foreign exchange in case of withdrawal.

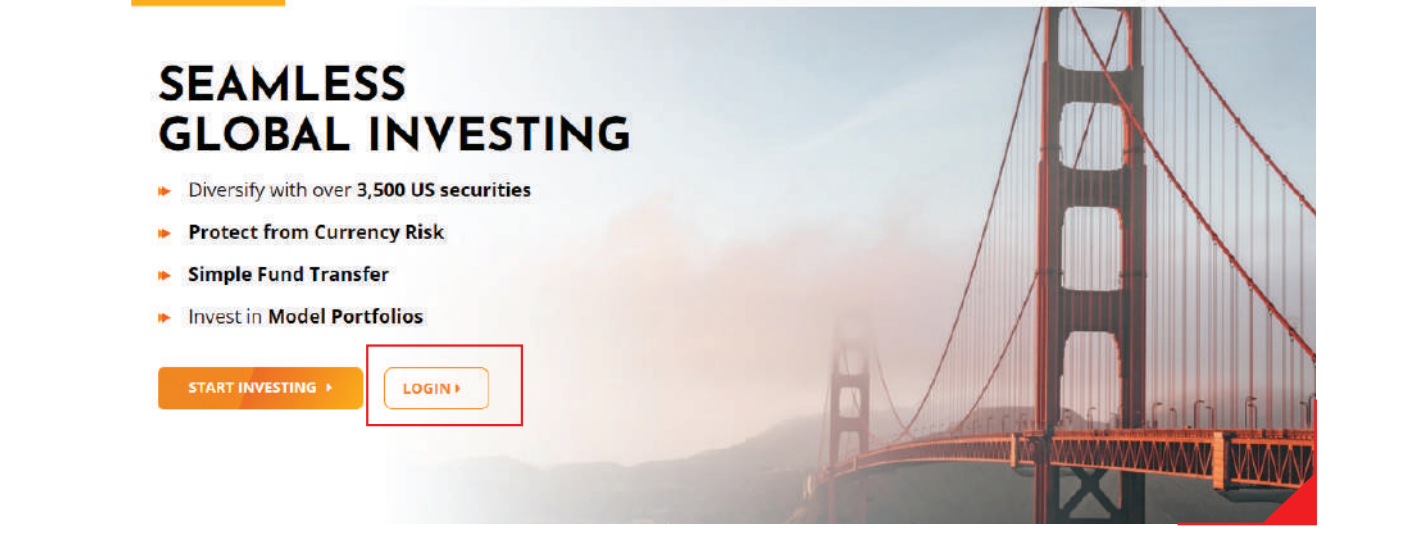


Step 3 - Create LRS logistics details

Client needs to fill in LRS logistics details for pickup of required documents on the address details provided above.

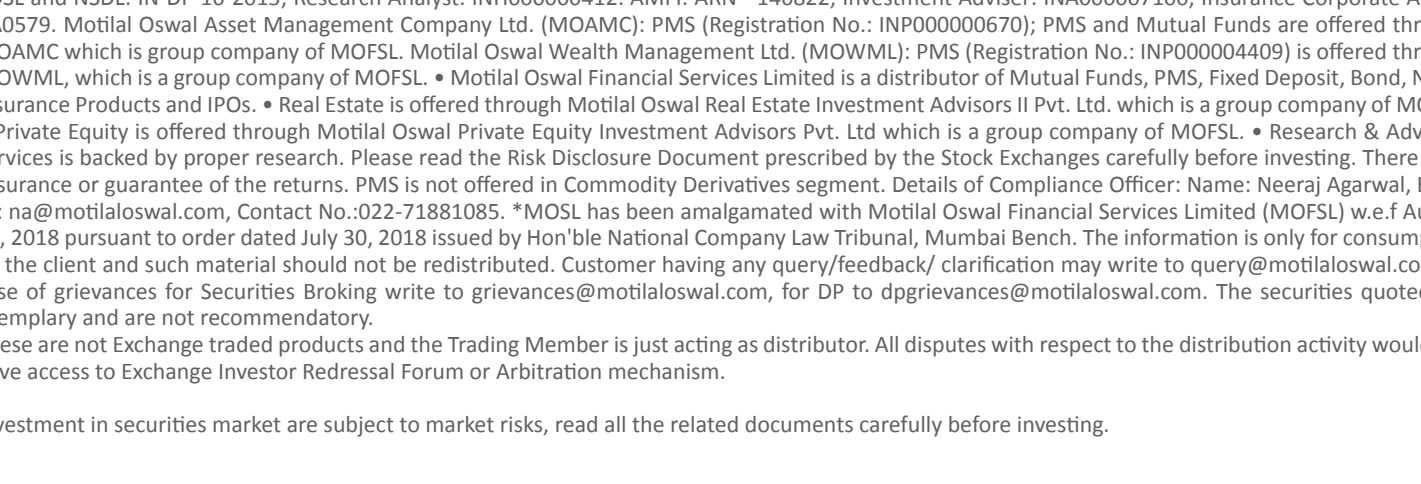
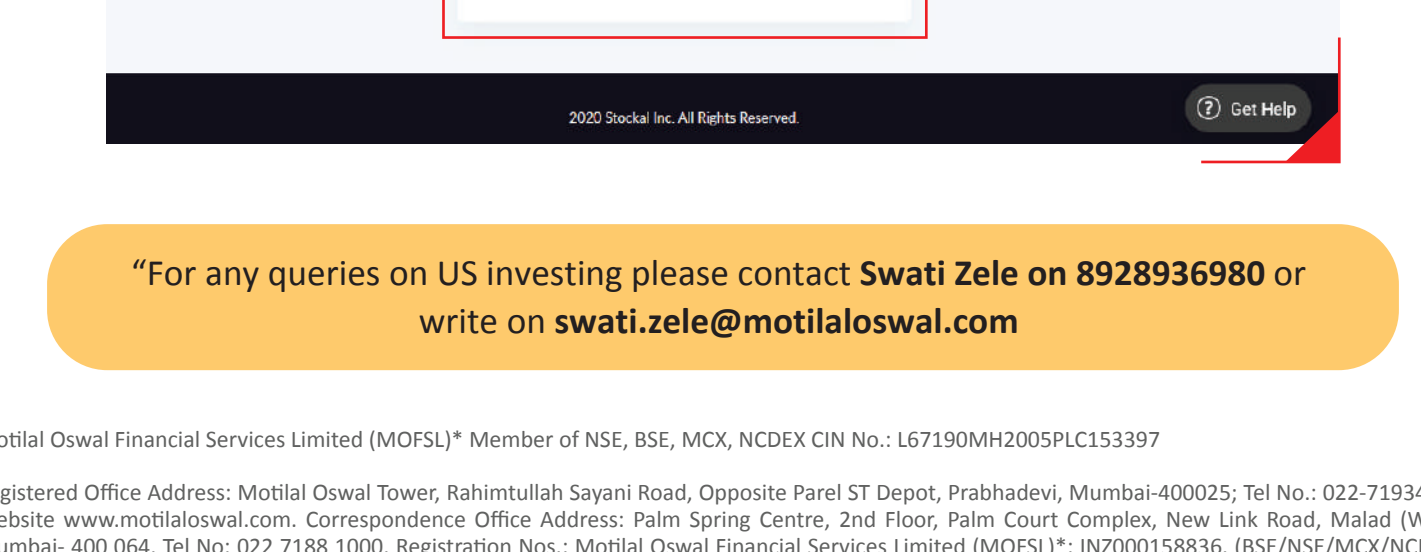


Below screen will be prompted once client submits all required documents. And it will show you pending status due to address proof review. Once above producer are completed user will be able to trade in US equities.



Existing user journey

Click on "Invest in US Equities" under Help Me Invest section in Web & Invest Now menu in App



"For any queries on US investing please contact Swati Zele on 8928936980 or write on swati.zele@motilaloswal.com

Motilal Oswal Financial Services Limited (MOSFL)* Member of NSE, BSE, MCK, NCDX CIN No. : L67190MH2005PLC153397
 Registered Office Address: Motilal Oswal Tower, Bahmtullah Sayani Road, Opposite Parel ST Depot, Prabhadevi, Mumbai-400025; Tel No. : 022-71934263; Website: www.motilaloswal.com; Correspondence Office Address: Palm Spring Centre, 2nd Floor, Palm Court Complex, New Link Road, Malad (West), Mumbai- 400 064. Tel No: 022 7188 1000. Registration Nos.: Motilal Oswal Financial Services Limited (MOSFL)*: INZ000158836. (BSE/NSE/MCK/NCDX); CDIL and NSDL: IN-DP-16-2015; Research Analyst: INH00000412. AMFI: ARN - 146822; Investment Adviser: INA000007100; Insurance Corporate Agent: CA0579; Motilal Oswal Asset Management Company Ltd. (MOAMC); PMS (Registration No.: INP00000670); PMS and Mutual Funds are offered through MOAMC, which is a group company of MOSFL. Motilal Oswal Wealth Management Ltd. (MOWML); PMS (Registration No.: INP00000420) is offered through MOWML, which is a group company of MOSFL. * Motilal Oswal Financial Services Limited is a distributor of Mutual Funds, PMS, Fixed Deposit, Bond, NCDs, Insurance Products and IPOs. * Real Estate is offered through Motilal Oswal Real Estate Investment Advisors Pvt. Ltd. which is a group company of MOSFL. * Private Equity is offered through Motilal Oswal Private Equity Investment Advisors Pvt. Ltd which is a group company of MOSFL. * Research & Advisory services is backed by proper research. Please read the Risk Disclosure Document prescribed by the Stock Exchanges carefully before investing. There is no assurance or guarantee of the returns. PMS is not offered in Commodity Derivatives segment. Details of Compliance Officer- Name: Neeraj Agrawal, Email ID: nag@motilaloswal.com, Contact No: 022-71881085. * MOSFL has been amalgamated with Motilal Oswal Financial Services Limited (MOSFL) w.e.f August 21, 2018 pursuant to order dated July 30, 2018 issued by Hon'ble National Company Law Tribunal, Mumbai Bench. The information is only for consumption by the client and such material should not be redistributed. Customer having any query/feedback/clarification may write to query@motilaloswal.com. In case of grievances for Securities Broking write to grievances@motilaloswal.com, for DP to dp@grievances@motilaloswal.com. The securities quoted are exemplary and are not recommendatory. These are not Exchange traded products and the Trading Member is just acting as distributor. All disputes with respect to the distribution activity would not have access to Exchange Investor Redressal Forum or Arbitration Mechanism.

Investment in securities market are subject to market risks, read all the related documents carefully before investing.