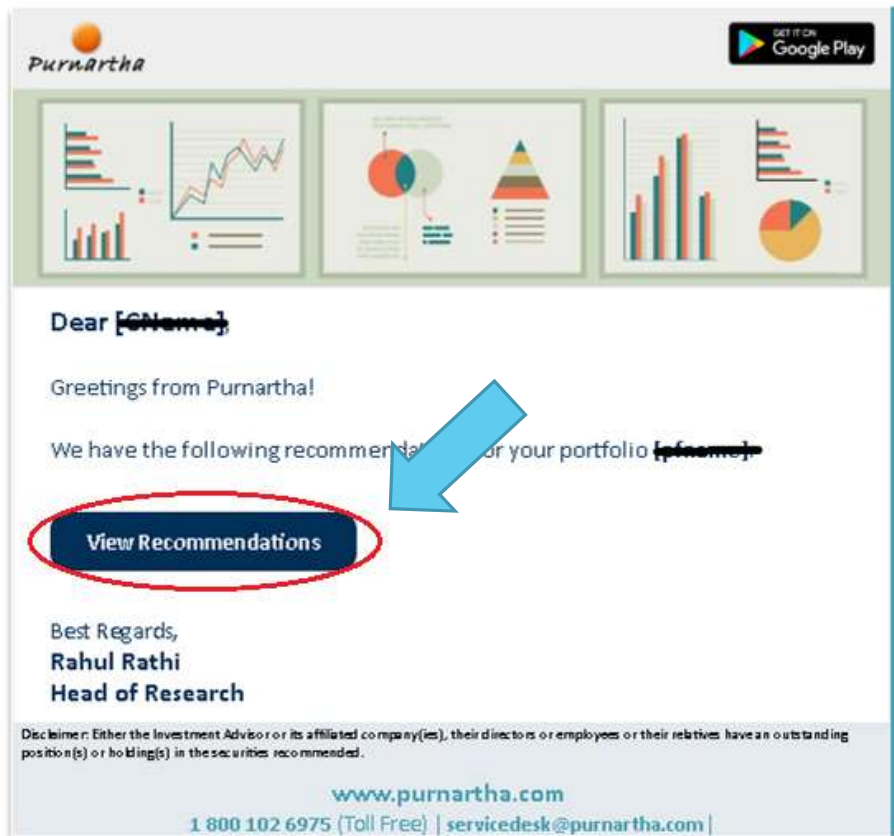




Purnartha Recommendation Flow

1) Recommendation Link



The image shows a screenshot of an email from Purnartha. At the top left is the Purnartha logo, and at the top right is a 'GET IT ON Google Play' badge. Below the header is a decorative banner with three panels of financial charts. The main body of the email starts with 'Dear [Name]', followed by 'Greetings from Purnartha!' and 'We have the following recommendations for your portfolio [Name]'. A blue arrow points to a dark blue button with the text 'View Recommendations', which is circled in red. Below the button, the email is signed 'Best Regards, Rahul Rathi, Head of Research'. At the bottom, there is a disclaimer, the website 'www.purnartha.com', and contact information: '1 800 102 6975 (Toll Free) | servicedesk@purnartha.com'.

Purnartha GET IT ON Google Play

Dear [Name],

Greetings from Purnartha!

We have the following recommendations for your portfolio [Name]

View Recommendations

Best Regards,
Rahul Rathi
Head of Research

Disclaimer: Either the Investment Advisor or its affiliated company(ies), their directors or employees or their relatives, have an outstanding position(s) or holding(s) in the securities recommended.

www.purnartha.com
1 800 102 6975 (Toll Free) | servicedesk@purnartha.com

RM Communication Email & SMS

- ▶ SMS to respective IIFL & Purnartha RM
- ▶ Recommendation mail from Purnartha has been sent to Pradeep Vispute (client) on the client's registered e-mail ID.
- ▶ Email to respective IIFL & Purnartha RM

“

Subject : Purnartha recommendation sent to **Pradeep Vispute**

Dear Relationship manager,

Recommendation mail from Purnartha has been sent to XXX (client) on the client's registered e-mail ID.

Regards,
Purnartha Recommendation team”

2) Ask OTP Verification



The screenshot displays a web interface with a modal window titled "Verify OTP". The modal contains two input fields: "Email:" and "Mobile Number:". A blue arrow points from the "Mobile Number:" field down to the "Send OTP" button, which is highlighted with a red circle. The background shows a sidebar with options like "Execute" and "Upload respective contract note".

Recommendations for (portfolio) :
Execute recommendations with Zerodha
[Execute](#) Zerodha, India
Upload respective contract note [Click here](#)

Verify OTP

Email:
[Redacted]

Mobile Number:
[Redacted]

[Send OTP](#)

1-800-102-6975 (Toll Free) www.purnartha.com servicedesk@purnartha.com

3) OTP sent to register e-mail and mobile

The image shows a screenshot of the Purnartha website's OTP verification interface. At the top, there is an orange header with the Purnartha logo and the website URL www.purnartha.com. Below the header, a text prompt reads "9100 is your OTP for Purnartha Verification". A smartphone icon is shown with "OTP" on its screen, and a large green arrow points from it to the verification form. The form is titled "Verify OTP" and contains the following fields:

- Email:** bh****@purnartha.com
- Mobile Number:** +9198****199
- Enter OTP:** [input field]

At the bottom of the form, there is a "Resend OTP" link and a "Verify" button, which is circled in red. The background of the page shows a "Recommendations for (portfolio)" section with an "Execute" button and a "Disclaimer" link.

4) Recommendation Page

Purnartha

Recommendations for (portfolio) :

Upload Contract note [Click here](#)

Equity

Ujivan Financial Services Ltd

Current Price as on 06/03/2019 ₹ 284.10	Quantity 176	Current Value as on 06/03/2019 ₹ 50,001.60
---	-----------------	--

Comment: Buy at current market price [Comment](#)

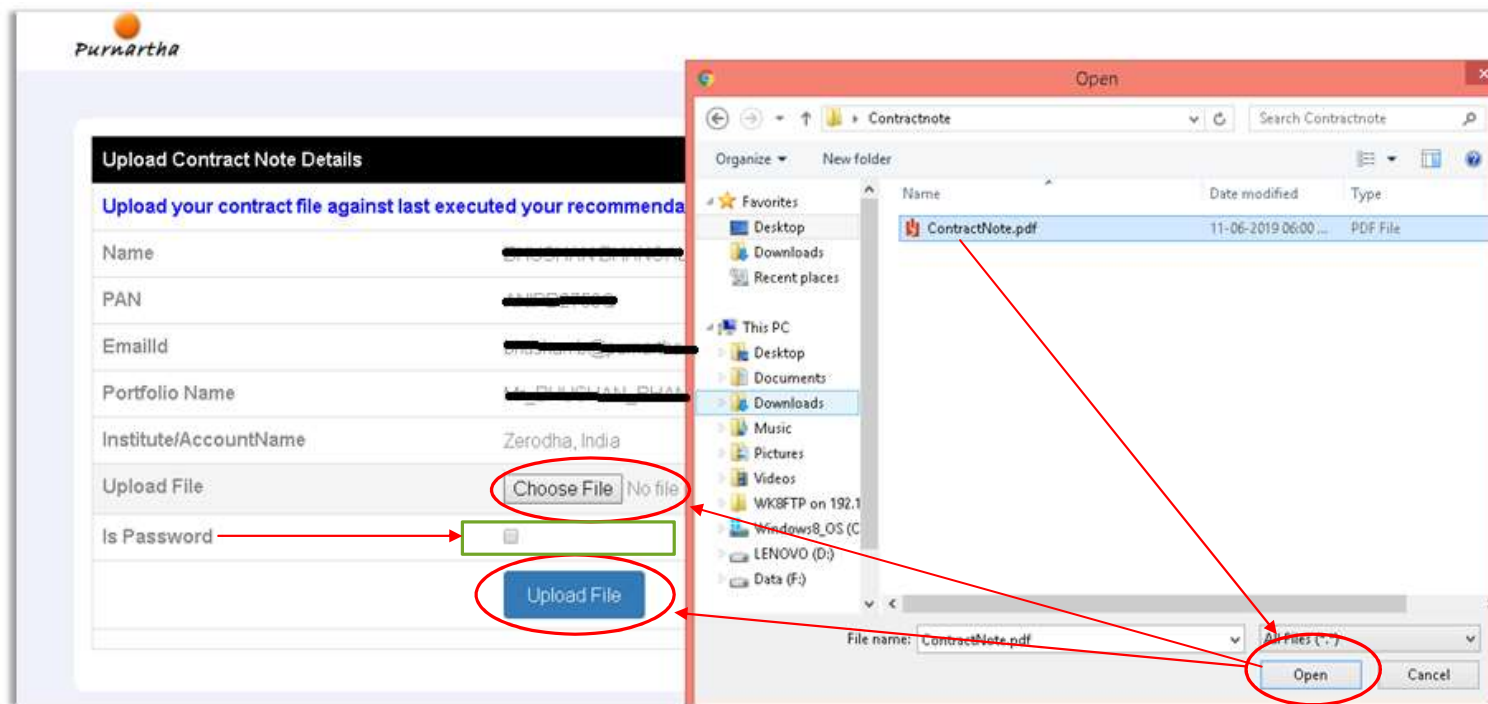
Upload Contract note [Click here](#)

BUY

Upload contract Note

Action

Contract note



Contract Note Uploaded



Contract note successfully uploaded!

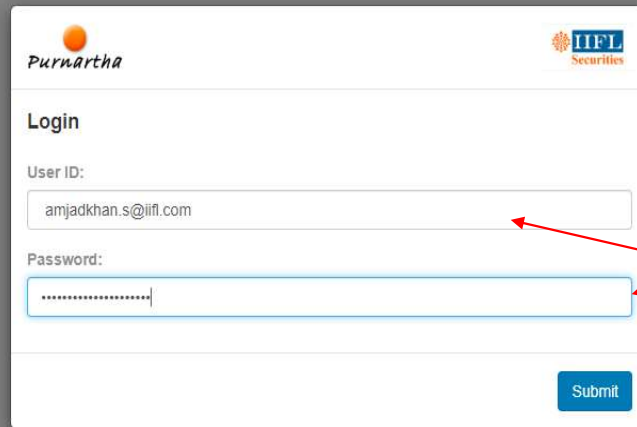


Thank you!



Recommendation History Report

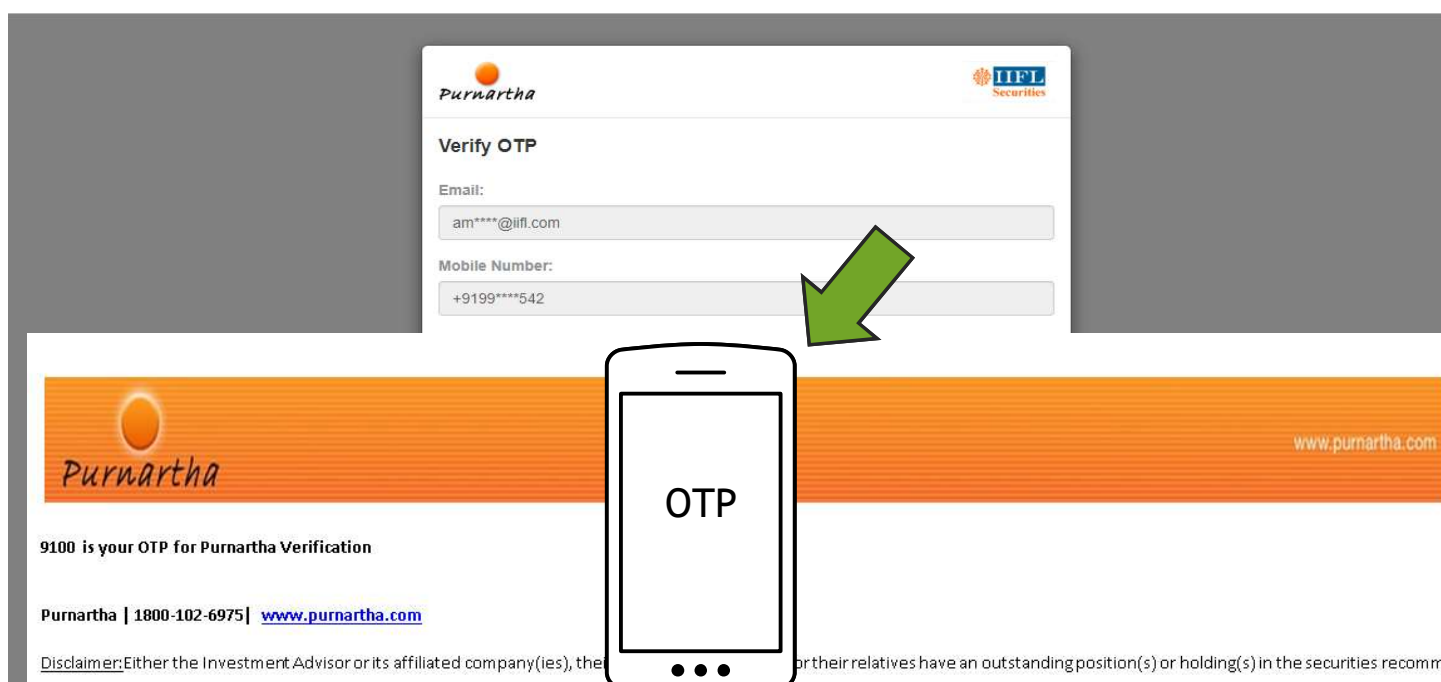
1) IIFL RM Authentication



The screenshot shows a login form for IIFL RM. At the top left is the 'Purnartha' logo, and at the top right is the 'IIFL Securities' logo. The form is titled 'Login' and contains two input fields: 'User ID:' with the value 'amjadkhan.s@iifl.com' and 'Password:' with masked characters. A blue 'Submit' button is located at the bottom right of the form.

RM Login
and
Password

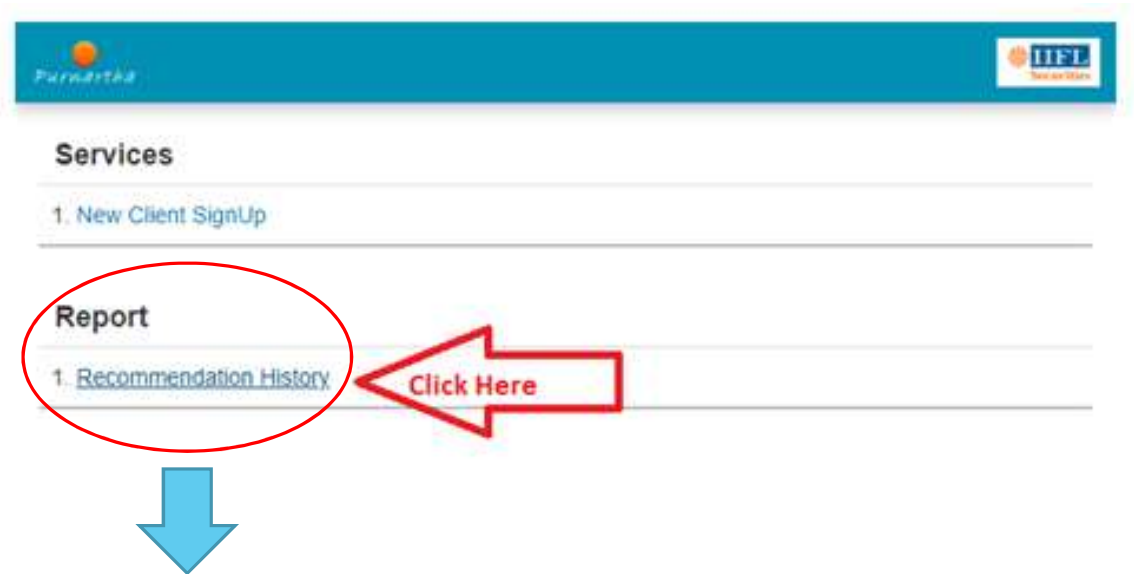
2)RM OTP Verification



The image shows a screenshot of a web application interface for Purnartha. At the top, there is a header with the Purnartha logo on the left and the IIFL Securities logo on the right. Below the header is a form titled "Verify OTP". The form contains two input fields: "Email:" with the value "am****@lifi.com" and "Mobile Number:" with the value "+9199****542". A green arrow points from the Mobile Number field to a mobile phone icon below it. The mobile phone screen displays "OTP". Below the phone icon, the text "OTP" is written. The background of the screenshot is a grey gradient. At the bottom of the screenshot, there is a footer with the Purnartha logo, the text "9100 is your OTP for Purnartha Verification", and contact information: "Purnartha | 1800-102-6975 | www.purnartha.com". A disclaimer is also visible at the bottom: "Disclaimer: Either the Investment Advisor or its affiliated company(ies), the or their relatives have an outstanding position(s) or holding(s) in the securities recommended."

OTP

3) Reports Link



The screenshot shows a web application interface with a blue header bar. On the left, the word "Purnarth" is written in white. On the right, there is a logo for "IIFL" with the tagline "The art of life" below it. Below the header, the word "Services" is displayed in bold. Underneath, there is a list of services: "1. New Client SignUp" and "1. Report". The "Report" link is circled in red. A red arrow with the text "Click Here" inside it points to the "Report" link. Below the "Report" link, a blue arrow points downwards.

4) Recommendation

14 1 of 1 Find |  Export utility 8-Jul-2019 12:25

Recommendation history

Date of Recommendation/ Client Name	Sales RM Code	Sales RM Email	Stock	Code	Quantity	Price	Action
NARAYANAN VENKATA KRISHNAN							
27-May-2019 15:02	C91377	amjadkhan.s@iifl.com					
			Whirlpool of India Ltd	WHIRLPOOL	316.00	₹1,382.85	BUY
			Avenue Supermarts Ltd	DMART	193.00	₹1,291.80	BUY
			Ujjivan Financial Services Ltd	UJJIVAN	1,069.00	₹350.75	BUY
			Bajaj Finance Ltd	BAJFINANCE	108.00	₹3,455.80	BUY
28-May-2019 18:00							
			Kotak Mahindra Bank Ltd	KOTAKBANK	248.00	₹1,511.00	BUY
SATHYAMOORTHY S S							
27-Jun-2019 15:23	C91377	amjadkhan.s@iifl.com					
			Whirlpool of India Ltd	WHIRLPOOL	110.00	₹1,585.00	BUY
			Avenue Supermarts Ltd	DMART	71.00	₹1,393.05	BUY
			Bajaj Finance Ltd	BAJFINANCE	41.00	₹3,637.15	BUY
			SBI Liquid Fund (Div-W)		541.00	₹1,061.78	BUY
VASANT KUMAR BHANDARI							
27-May-2019 15:05	C91377	amjadkhan.s@iifl.com					
			Avenue Supermarts Ltd	DMART	77.00	₹1,291.80	BUY
			Whirlpool of India Ltd	WHIRLPOOL	126.00	₹1,382.85	BUY
			Ujjivan Financial Services Ltd	UJJIVAN	427.00	₹350.75	BUY
			Bajaj Finance Ltd	BAJFINANCE	43.00	₹3,455.80	BUY

Thank You

