

Limit setting Policy

Oswal Shares & Securities Ltd.

Limit setting on consideration of ledger balance, margin account balance, cash collaterals, share collaterals, dmat account holding under power of attorney and beneficiary / pool account holding with haircut

- To set limits of individual clients as well as clients of groups, family, branch
 - Consideration of ledger balance and margin account balance while setting limits
 - Consideration of cash collaterals as well as share collaterals while setting limits
 - Consideration of dmat account holding under power of attorney while setting limits
 - Consideration of beneficiary / pool account holding with haircut
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- RMS policy settings for individual clients
 - RMS policy settings on clients of groups, families, branches
 - Template policy creation
 - Ledger outstanding age analysis
 - Limit settings in three scenarios, debit, credit and nil
 - Optional consideration of dmat accounts
 - Consideration of collaterals as well as margin account in futures and options
 - Combined limit settings on NSE Cash, BSE Cash, NSE FO and BSE FO