Vyra Securities

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Vyra Securities Broking LLP

A Full-Service Investment and Wealth Services Partner

Invest. Grow. Prosper.

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01 / YOUR INVESTMENT JOURNEY

Start With Clarity. Move With Confidence.

A simple path for a first-time investor — from account opening to making informed choices.

1

OPEN YOUR DEMAT ACCOUNT

Complete the applicable account-opening and KYC process.

2

DEFINE YOUR GOALS

Be clear about your investment goals, liquidity and your risk appetite.

3

UNDERSTAND YOUR RISK

Consider how much market movement and potential loss you can reasonably accept.

4

SELECT PRODUCTS

Choose among investment products after considering goals and time horizon.

5

INVEST & MONITOR

Invest, monitor, review, rebalance your portfolio during intervals.

THE IDEA IS SIMPLE

Understand first → choose appropriately → invest through processes → monitor → review.

The right journey starts with your objective, risk profile, time horizon and liquidity needs.

02 / INTRODUCTION

The Partner Your Financial Journey Deserves

A relationship that feels personal. Clarity when you need it. Access when you want it.

WHAT VYRA BRINGS TO THE RELATIONSHIP

Vyra Securities combines relationship-led assistance with access to a broad financial-services ecosystem. The aim is to help clients understand opportunities, recognise risk and access suitable investment products.

INSIGHT YOU CAN TRUST

Access to eligible research and market information through Motilal Oswal Financial Services.

A WORLD OF POSSIBILITIES

A broad range of investment and financial products.

ATTENTION THAT FEELS PERSONAL

Relationship-led assistance & support.

SIMPLICITY AT YOUR FINGERTIPS

Digital platforms designed for convenience.

KNOWLEDGE THAT BUILDS CONFIDENCE

Clear explanations of markets, products and risks.

A RELATIONSHIP, NOT A TRANSACTION

Support that evolves with changing needs.

WHAT YOU CAN EXPECT FROM VYRA

Access, understanding and ongoing support work together across the investment journey.

CLARITY

Clear explanations of products, markets and risk.

ACCESS

Access to investment products.

CONTINUITY

Relationship-led support for service and review.

A relationship-led approach keeps the client journey connected from information to execution and ongoing support.

03 / OUR VISION

Empowering Ambitions, Enriching Futures.

Opening the door to wealth creation — inclusive, informed and with a clear sense of direction.

OUR LONG-TERM AMBITION

To become a trusted financial-services name across India, helping people participate in securities markets with understanding, discipline and confidence.

FIRST-TIME INVESTORS

Clear explanations that build confidence.

SEASONED INVESTORS

Relevant insights for informed decisions.

FAMILIES & BUSINESSES

Solutions aligned to financial needs.

TECHNOLOGY WITH A REACH

Convenient access through digital platforms.

KNOWLEDGE & CONFIDENCE

Education that helps & supports better decisions.

LONG-TERM RELATIONSHIP

Ongoing service as needs evolve.

WHAT THIS VISION MEANS FOR CLIENTS

Clarity, responsible participation, transparent communication and support.

ACCESS & CONVENIENCE

Approved digital and service channels.

INFORMATION

Tools that simplify access and information.

RESPONSIBLE PARTICIPATION

Clear information before decisions.

ONGOING SUPPORT

Support through changing goals.

04 / OUR SOLUTIONS

Explore a Complete Financial Ecosystem

A wide range of investment and financial solutions designed for different goals and life stages.

EQUITIES
Listed businesses and market participation.

DERIVATIVES
Futures and options for suitable, experienced investors.

COMMODITIES
Exchange-traded commodity opportunities.

IPOs & NEW ISSUES
Primary-market opportunities and application support.

MUTUAL FUNDS
Equity, debt, hybrid, index and other categories.

PROTECTION SOLUTIONS
Protection-oriented solutions.

BONDS & FIXED INCOME
Government securities, corporate bonds and other fixed-income instruments.

PMS & AIF
Professionally managed and alternative solutions for investors.

INTERNATIONAL INVESTING
Global market access and US-market opportunities.

CHOOSE THE RIGHT SOLUTION FOR YOUR GOALS

1 GOAL → 2 RISK PROFILE → 3 TIME HORIZON → 4 SUITABLE SOLUTION

Your financial goals, risk profile, time horizon and liquidity needs help determine which products may be appropriate.

Product availability, eligibility and terms depend on the provider and regulations.

05 / MARKET ACCESS

Confidence to Participate

Access multiple asset classes through a reliable platform with research, tools and support.

MARKET ACCESS WITH DISCIPLINE

Understand the opportunity, the downside and the process before taking a market position.

EQUITIES

Listed companies

Long-term growth opportunities

Fundamental analysis

DERIVATIVES

Index and stock derivatives

Hedging and trading strategies

Risk-management opportunities

COMMODITIES

Gold, silver and base metals

Energy and commodity markets

InvITs & REITs

Infrastructure and real estate investment trusts

Income and market risks

MARKET ACCESS PRINCIPLES

KNOW THE EXPOSURE

Understand the instrument, leverage, volatility and how prices can move.

KNOW THE DOWNSIDE

Consider capital at risk, liquidity, margin requirements and potential losses.

KNOW THE PROCESS

Use approved channels and review applicable terms, costs and disclosures.

MARKET PARTICIPATION IN FOUR WORDS

RESEARCH • RISK • EXECUTION • REVIEW

Risk management does not eliminate risk — it helps investors recognise and manage exposure.

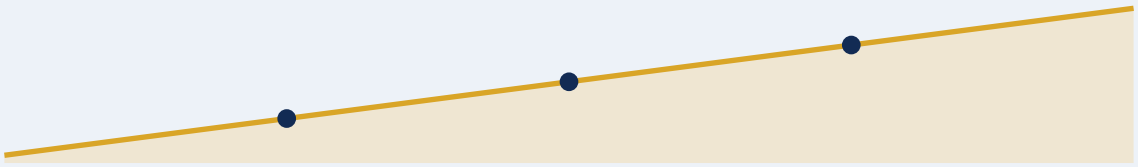
06 / MUTUAL FUNDS

Small Steps, Extraordinary Journeys

Disciplined investing. A long-term perspective. A future worth waiting for.

DISCIPLINED, REGULAR INVESTING — AN ILLUSTRATIVE GROWTH PATH

Regular investing can help build discipline over time; actual outcomes vary with market performance.



Illustrative only — not a forecast or guarantee.

EQUITY FUNDS

Diversified exposure across equity categories.

DEBT & HYBRID

Fixed-income-oriented and blended investment approaches.

INDEX FUNDS & ETFs

Strategies designed to track specified market indices.

SYSTEMATIC INVESTMENT PLAN

Regular investing at permitted frequencies to encourage discipline.

STP / SWP

Systematic transfer and withdrawal facilities, where available.

GOAL-BASED INVESTING

Align objectives, horizon, risk tolerance and allocation.

WAYS TO INVEST IN MUTUAL FUNDS

Choose a route that fits your cash flow, goals and investment horizon.

SIP

Regular investing at permitted frequencies to build discipline.

LUMPSUM

Invest a larger amount at one time, subject to suitability and market conditions.

STP

Systematic transfer between eligible schemes or funds, where available.

SWP

Systematic withdrawals from eligible investments, where available.

All investments carry product-specific risks, costs and eligibility conditions.

07 / NEW OPPORTUNITIES

Access a Wider Universe of Opportunities

Primary markets, fixed income and corporate actions can complement a diversified portfolio.

IPOs & NEW ISSUES

Eligible primary-market opportunities. Review offer documents, valuation, business model and risks.

BONDS & FIXED INCOME

Government securities, corporate bonds and other eligible fixed-income products.

CORPORATE ACTIONS

Rights issues, bonuses, buybacks, stock splits and other company actions.

A SIMPLE DECISION FLOW

01 **UNDERSTAND**

Read the offer, issuer information or product terms.

02 **ASSESS**

Consider return, risk, liquidity and tenure.

03 **COMPARE**

Review costs, alternatives and portfolio fit.

04 **DECIDE**

Proceed only when the opportunity is suitable for your goals.

WHAT TO REVIEW BEFORE INVESTING

ISSUER / COMPANY

Business model, financial strength and governance.

POTENTIAL GAINS

Possible gains; compare with alternatives and understand the risks.

RISKS

Credit, market and liquidity risks.

TENURE / LOCK-IN

Maturity period, lock-in and exit conditions.

TAX & CHARGES

Taxes, fees and charges.

MORE OPPORTUNITIES. A MORE COMPLETE PORTFOLIO.

Primary Markets • Fixed Income • Corporate Actions • Diversified Portfolio

Review the relevant offer document, product note or disclosure before investing.

08 / ADVANCED SOLUTIONS

For Those Who Dream Bigger

Professionally managed and alternative solutions can serve investors with specific needs.

ELIGIBILITY & RISK

These products may be complex or illiquid. Review minimums, fees, lock-ins, exit terms and suitability.

PORTFOLIO MANAGEMENT SERVICES

Discretionary or non-discretionary management through registered portfolio managers.

ALTERNATIVE INVESTMENT FUNDS

Privately pooled vehicles investing in permitted private markets, credit, real assets and other strategies.

MODEL PORTFOLIOS

Technology and analytics supporting model-based solutions. Understand the provider and structure.

STOCK BASKET

Theme, sector or factor-based baskets. Composition, rebalancing, costs and risk vary.

WHEN AN ADVANCED SOLUTION MAY FIT

SPECIFIC OBJECTIVE

A clearly defined investment objective.

SUFFICIENT HORIZON

Time to accommodate product structure and liquidity.

RISK CAPACITY

Ability to tolerate potential loss or illiquidity.

UNDERSTANDING

Comfort with fees, structure and provider terms.

Advanced and alternative products may be complex or illiquid and may not suit all investors.

09 / CLIENT JOURNEY

A Simple, Structured Journey — With You at Every Step

From understanding your goals to long-term wealth creation, guidance, information and support.

01 UNDERSTAND
Your goals, priorities, investments, horizon, liquidity and risk.

02 EDUCATE
Explain products, potential benefits, limitations and risks.

03 EVALUATE
Assess suitability, diversification, objectives and risk.

04 EXECUTE
Invest through approved platforms.

05 MONITOR
Periodic review of portfolios, objectives and circumstances.

06 GROW
Work toward long-term goals with consistency and discipline.

HOW WE SUPPORT THE JOURNEY

PERSONALISED GUIDANCE
Advice aligned to changing needs.

MARKET INSIGHTS
Relevant information for informed decisions.

ONGOING SUPPORT
Assistance for service and product queries.

OUR RELATIONSHIP CONTINUES BEYOND THE INVESTMENT

Ongoing guidance, service support and periodic reviews.

Step by step. Side by side. With support that continues beyond the first transaction.

UNDERSTAND → ACT → MONITOR

A connected journey, not a one-time transaction.

10 / OUR PHILOSOPHY

Better Thinking. Better Investing. Better Living.

A disciplined approach grounded in clear principles and responsible conduct.

PURPOSE
Goals give investing meaning.

QUALITY
Focus on businesses, products and strategies.

DISCIPLINE
Consistency over short-term prediction.

DIVERSIFICATION
Manage unnecessary concentration.

PATIENCE
Long-term perspective and persistence.

RISK AWARENESS
Consider potential losses alongside returns.

OUR PRINCIPLES IN ACTION

Purpose, discipline, transparency and trust should show up in the way clients are supported.

TRUST
Consistency, transparency and reliability.

INTEGRITY
Long-term credibility over short-term gain.

CLIENT FIRST
Respect each individual circumstance.

PROFESSIONALISM
Knowledge, process and responsible conduct.

LEARNING
Markets evolve continuously. So do we.

RISK AWARENESS
Understand downside alongside opportunity.

A PRACTICAL MINDSET

Define the goal • stay disciplined • review and learn

A simple framework for making informed decisions over time.

11 / SERVICE PROMISE

Our Relationship Goes Beyond Investments

Technology that simplifies. Relationships that endure. Knowledge that empowers.

STAY SAFE

Never share passwords, OTPs or trading credentials. Use only approved broker and product-provider channels for funds and securities.

TECHNOLOGY

Digital investment facilities, approved broker platforms and service processes designed for convenience.

RELATIONSHIP

Personalised support for demat account opening, service requests, product information and escalation.

EDUCATION

Market basics, investing versus trading, diversification, compounding, volatility, F&O risks and fraud awareness.

RESPONSIBLE PRACTICES

Clear product information, risk awareness, approved channels and appropriate regulatory disclosures.

OUR ONGOING SUPPORT

Digital convenience + human support across the client journey.

ACCOUNT OPENING

KYC and onboarding support through channels.

PRODUCT CLARITY

Explain products, features, risks and suitability factors.

SERVICE & ESCALATION

Help with service requests and route issues through the process.

ONGOING REVIEW

Support informed monitoring, review and next-step decisions.

CALL & TRADE | Assistance through applicable approved broker channels

Real people. Approved processes. Ongoing client support.

12 / DIVERSIFICATION

Diversification Across Key Asset Classes

A diversified approach can help manage concentration by spreading exposure across different asset classes.

EQUITY

Listed shares; market-price risk and growth potential.

DEBT

Bonds and fixed-income instruments; credit, rate and liquidity risks.

MUTUAL FUNDS

Pooled investments managed according to the scheme objective.

COMMODITIES

Exposure to commodity markets influenced by global supply and demand.

INTERNATIONAL

Global-market exposure with market and currency risks.

WHY DIVERSIFY?

Different asset classes can behave differently under changing market conditions.

SPREAD EXPOSURE

Avoid excessive concentration in one asset, sector or market.

MATCH YOUR GOALS

Align allocation with objectives and time horizon.

RISK-AWARE INVESTING

Consider volatility, liquidity, credit and currency risks.

DIVERSIFICATION DOES NOT ELIMINATE RISK

Diversification may reduce concentration risk, but it cannot eliminate market losses.

The appropriate mix depends on your objectives, risk profile, liquidity needs and time horizon.

13 / LONG-TERM WEALTH CREATION

Build Wealth With Time, Discipline and Consistency

Compounding can help investments grow over the long term when returns remain invested and time is allowed to work.

A simple principle: Reinvesting gains allows your investment to benefit from compounding over time.

START EARLY

Give investments more time to grow.

STAY INVESTED

Avoid unnecessary interruptions where appropriate.

REINVEST GAINS

Keep gains invested so they may contribute to future growth.

STAY DISCIPLINED

Consistency can matter more than reacting to every market movement.

REVIEW & REBALANCE

Adjust when goals, risk comfort or circumstances change.

THE POWER OF COMPOUNDING

Time + Discipline + Reinvestment

1. **TIME**
   Give your investment more time to grow.
2. **DISCIPLINE**
   Stay consistent with the plan.
3. **REINVEST**
   Keep gains invested.

A SIMPLE EXAMPLE

Invest → build gains → reinvest → future growth can build over time.

Actual outcomes depend on returns, contributions, costs and market performance.

COMPOUNDING

The longer money remains invested and the more consistently returns are reinvested, the greater the potential for compounding.

Illustrative concept only — actual investment outcomes vary and are not guaranteed.

14 / RISK MANAGEMENT & HEDGING

Manage Risk. Understand Your Exposure.

Good investing is not only about opportunity; it is also about knowing what can go wrong.

MARKET RISK

Prices can rise or fall because of market conditions, economic developments and sentiment.

CREDIT RISK

An issuer or counterparty may fail to meet its obligations.

LIQUIDITY RISK

An investment may not be easy to sell quickly at the desired price.

LEVERAGE RISK

Borrowing or leveraged products can magnify both gains and losses.

A SIMPLE RISK-AWARENESS FLOW

KNOW
Know the exposure.

→

UNDERSTAND
Understand the downside.

→

DIVERSIFY
Use suitable diversification.

→

REVIEW
Review the plan.

RISK AWARENESS

- Know the exposure
- Understand the downside
- Use suitable diversification
- Review the plan

Risk can be managed — not eliminated.

CBD Belapur, Navi Mumbai

Invest. Grow. Prosper.

Your financial journey deserves clarity, discipline, access — and a partner who walks with you, every step of the way.

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