



MUDRAGUNA FUNDSMART

INVESTMENT GUIDELINES & RISK DISCLOSURE

As on 5th January, 2025

Dear Client,

Greetings from Mudraguna!!

We are sharing the complete set of investment guidelines and risk disclosures for the investors investing in the stock market under our stock market consultancy services.

The below mentioned investment guidelines and risk disclosures are prescribed by our management for the investment done by the investors in the stock market. Investors are advised to thoroughly go through the below mentioned guidelines and disclosures:

INVESTMENT GUIDELINES

1. Every individual which is taking our stock market consultancy gold and silver service plan needs to fill the stock market questionnaire form so that our expert can understand the investment requirement, risk appetite, financial goal, type of portfolio to be recommended.
2. Stock market portfolio profile is being provided to the individual who is taking our Stock Market Consultancy and Management Service (Gold and Silver Service Plans) which is based on the questionnaire filled by the individual.
3. Individuals taking stock market consultancy bronze service plan doesn't require to fill any questionnaire since this service aims to provide stock recommendations for positional investments i.e., 3 months to 1 year.
4. Stock recommendations are based on the individual analysis and may vary as per the financial goals and risk appetite.
5. Recommendation on the new stock will be provided through our Company Analysis Report.
6. The recommendation to initiate further investment or do averaging in the already recommended stock will be provided through our WhatsApp and Telegram Channel only in a prescribed format.
7. Returns on the recommended stocks may vary as per the market conditions.

MUDRAGUNA FUNDSMART PRIVATE LIMITED
PREVIOUSLY KNOWN AS MUDRAGUNA ADVISORY PRIVATE LIMITED

CIN: U93000DL2019PTC357388

REG OFFICE: A-156, T-2, Dilshad Colony, Delhi-110095

CONTACT: - +91-8178275873, EMAIL ID: - helpdesk.mudraguna@gmail.com

Website: - www.mudraguna.com



8. The recommendations on the stocks in our stock market consultancy gold and silver service plans are provided for long term horizon i.e., for more than 6 months and not for short term gains.
9. The recommendations on the stocks in our stock market consultancy bronze service plans are provided for short to medium term time horizon i.e., for more 3 months to 1 year.
10. The stocks will be recommended to the clients through our WhatsApp and Telegram Channel only and not through any other online applications.
11. Orders on the recommended stocks should be executed by the individual on stipulated time as per our guidance and any delay might cost you in achieving the returns and goals.
12. If any stock is being either included or excluded in the equity portfolio of the client which is not being recommended or advised by the advisor or technical analyst, it will not be considered as part of the equity portfolio and team Mudraguna will not be responsible for any of the losses incurred by the client, however our expert will provide recommendations whether to hold or exit the stock.
13. The recommended stocks are only for investment purpose and shall not be used for trading purpose.
14. It is advised not to buy or sell any stock other than recommended portfolio. In case you are keen to add any specific stock in the portfolio, kindly consult with the financial expert before taking any decision.
15. Recommendation to exit from the stocks are applicable in the below mentioned scenarios:
 - a. If the Target Price mentioned in the portfolio is achieved and there is no further growth potential left for the stock.
 - b. If the Client's planned goal amount is achieved.
 - c. In case of any medical or financial emergency, that can't be fulfilled through any other source.
 - d. If the Index is expected to fall more than 25%. In this scenario the decision will be made as per the prevailing situation.
16. The fees paid will only be for the current investment slab and it will rise with the rise in the investment value.
17. The fees paid will only account for only one year of service.

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18. In case of additional fees payment due to rise in the investment value, the additional fees will only be applicable till the next year's fees renewal date.
19. Initial Public Offer (IPO): We only provide our recommendation regarding subscription in the initial public offer (IPO) through our Initial Public Offer Report. We do not initiate any investment in the IPOs on behalf of the client.
20. A. If the client had bought any securities (stocks) without our recommendation and afterward if the client seeks any advise on that particular securities (stocks) then it will be considered as part of the service.
- B. If the client had bought any securities (stocks) without our recommendation and afterward if the analyst suggests that particular securities (stocks) can be hold in your equity portfolio for long term investment then that securities (stocks) will be considered as part of the client's equity portfolio.
20. In case the client is not able to initiate its investments on the stocks recommended by the analyst based on the provided stock market portfolio profile and want's our expert to initiate the investment on his/her behalf then the client needs to provide a written consent through its registered email id for the same, without written consent our expert will not initiate the investments.

RISK DISCLOSURES

Disclaimer

General Information

We engage in the service of providing stock market consultancy services through fundamental and technical reports including charts and other technical tools to identify market pattern aiming to provide an overview of the previous trading pattern and expectation from the future market.

Investment Risks

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

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**Information Reliability**

The information and views in the analysis reports of our stock market consultancy services are believed to be reliable, but we do not represent or warrant its accuracy, completeness or reliability of the information contained in our analysis report, investors and clients are advised to independently evaluate the market conditions/ risks involved, before making any trading/investment decisions.

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Research Team

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under new regulation viz the Telecom Commercial Communications Customer Preference Regulations, 2010.

PRIVACY POLICY

Nature of Business

We provide fundamental and technical reports, including charts and tools, to identify market patterns for investors.

Information Accuracy

While we believe our information and views are reliable, we do not guarantee their accuracy, completeness, or reliability. Investors should independently evaluate market conditions and risks.

Confidentiality

Our reports are confidential and intended solely for the selected recipient. Unauthorized distribution or alteration is prohibited without prior written consent.

Data Source

Information in our reports is derived from publicly available data. We do not guarantee the accuracy or completeness of this data.

Risk Disclaimer

Investment in securities is subject to market risks. Past performance is not indicative of future results.

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We strive to minimize conflicts of interest in preparing research reports. We or our partners may have financial interests but did not receive compensation from the subject companies mentioned in the report.

Ownership Disclosure

Our company and partners do not collectively own 1% or more of the equity securities of the subject companies mentioned in the report.

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**Disciplinary Action**

No material disciplinary action has been taken against our company by any regulatory authority impacting equity research activities.

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Communication Authorization

Users authorize us to contact them, even if registered under the National Do Not Call Registry or other related regulations.

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Warm Regards
Team Mudraguna

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