


**Presenting**


*Loyalty Club*




**EVERY TRANSACTION HAS A POINT**



**Bronze**  
1 point+



**Silver**  
3000+  
points



**Gold**  
10,000+  
points



**Platinum**  
20,000+  
points

## LOYALTY REWARDS POINTS

PRODUCT	BUSINESS VOLUME	FY23 POINTS
Edelweiss NCD	1 Crore	5,000
AIF	1 Crore	5,000
Structured Product	1 Crore	5,000
Secondary Bonds	1 Crore	3,000
Broking Gross Revenue	10 Lakh	3,000
Mortgage	1 Crore	1,500
Unlisted Equity	10 Lakh	2,000
MF Lump-sum	1 Crore	1,000
Corp FD	1 Crore	600
Other NCDs	1 Crore	500
SGB	1 Crore	500
RBI Bonds	1 Crore	300
54EC Bonds	1 Crore	200
IPO (Apps)	100	50
Broking - NCA	1 Account	20
MF SIP	1 SIP of 1000 BV	10

\*Refer the detailed LoyaltyClub Terms & Conditions. For Mutual Funds, refer the scheme list which will qualify for points available on our platform

## Terms & Conditions:

- The terms and conditions of this Loyalty Club is applicable to all Partners empanelled with Nuvama Partners.
- Unless revoked or terminated, Loyalty Club shall be valid for the financial year 2022-23, i.e. from 1st April, 2022 to 31st March, 2023 or such other period as may be announced by Nuvama Partners('Tenure').
- Only valid and executed/ settled deals, allotment(s) taking place during the Tenure in accordance with internal policies of Nuvama Partners and applicable laws for the time being in force will be considered for the Loyalty Club.
- The trades executed by partners with its group companies or their Directors, Key managerial Personnel or employees and representatives shall not be considered.
- All partners can redeem reward points only after achieving minimum 500 Loyalty Club reward points earned through mobilization only.
- Partners will be able to redeem the points only during the redemption window period. The redemption window will be open minimum of two times during the Tenure. All leisure trips can be claimed only at the end of the financial year.
- In case Nuvama Partners decides to extend the tenure of Loyalty Club, or carry forward the FY22 points, the unutilized reward points of Loyalty Club may be 100% carried forward by partners to next financial year FY23.
- The gift claimed in the valid manner shall be distributed within one month from the last date of related redemption window. The partner has an option to redeem reward points during the given window period or to carry forward at next redemption window. No exchange of gifts against any voucher/cash once selected by the partners will be allowed
- Once the gifts are delivered to partners in proper condition to the satisfaction of the recipient, Nuvama Partners will not be responsible for any dispute regarding the post-sale service etc. The articles on display are indicative and the exact delivery is subject to availability of the articles. The specifications of each article must be checked before redeeming points against them.
- Partners should not offer or induce clients with any incentives, rebate, gifts or commissions in return of their investments.
- Partners should bear in mind the interest of their clients and investors as well as suitability to their financial needs. If it is found/ brought to our notice that the partner is, mobilizing the funds solely for the purpose of winning the prizes, the amount mobilized shall not be considered under Loyalty Club. The partner shall ensure their participation in Loyalty Club in fair, transparent and equitable manner. If any miss-sell is brought to our notice by investors or if we find out, such transactions will not be considered for the loyalty club.
- Under no circumstances, the prizes, if any will be exchanged for cash.
- Nuvama Partners reserves the right to make any amendments/modifications/ deletion including withdrawal of scheme with no liability at any point of time without prior notice and with no obligation of assigning any reasons
- for the same and partners agrees, declares that he shall not challenge the decision of Nuvama Partners in this regard in any manner whatsoever.
- Options provided for prizes shall depend upon the availability of the brands / items. If there is non-availability of any particular Brands /items, then Nuvama Partners will provide any other gift at its own discretion or will reverse the reward points to partner's account
- While redeeming the reward points for Gift Cards including e-vouchers, trips or other prizes, the terms and conditions of the respective service provider/ vendor would apply to the partner. The e-voucher, if any, shall be communicated to partner via registered email id. Hence, partner need to ensure the accurate email id registered with Nuvama Partners. Nuvama Partners shall not be responsible for any unauthorized use of e voucher by unknown recipient.
- Partner Grading will be calculated solely on the basis of current FY 2022-23 points only and carry forward points of previous FY22 will be excluded. All points added in FY23 will Qualify for Grading
- Nuvama Partners will not be liable for any deficiency/defect in any product or delay, if any, in provision of service by the concerned dealer/service provider subsequent to delivery of such prizes.
- All taxes and other applicable levies in respect of the prize will be borne by the relevant partner winning such prize on fulfilment of all the terms and conditions of Loyalty Club. Announcement of award and its subsequent delivery may be subject to recovery of tax or levies imposed/likely to be imposed on Nuvama Partners from the concerned partner.
- All partner participating in Loyalty Club shall be deemed to have agreed to all the terms and conditions of Loyalty Club issued from time to time and no further consent will be required to be obtained from any Nuvama Partners under any circumstances.
- This document is private and is intended for partner registered with Nuvama Partners. Neither this document nor any portion hereof shall be sold, reproduced or redistributed in any form, directly or indirectly, to any person/entity, in whole or in part, for any purpose whatsoever, other than BA who is registered with Nuvama Partners.
- List of Qualifying MF Schemes will be available on platform and mailed to all partners. Please check before mobilizing for qualifying under LoyaltyClub points.
- The contest is on net mobilization basis. Any AUM transfer out, cancellation, closure, SIP bounce will be deducted to arrive at the final score
- Minimum SIP Tenure need to be 3 Years & above. SIP worth Rs. 1000 and above will qualify for the contest
- SIP with monthly mode only will qualify in this contest
- Switched from liquid to nonliquid will qualify as fresh mobilization
- STP – The net amount received in targeted scheme during the contest period will qualify for the contest
- The list of schemes will continue to be updated on a monthly / quarterly basis. Please refer the list of schemes uploaded on the portal or get in touch with your RM.

- Nuvama Partners has the right to add/delete schemes without any prior notice
- AUM Transfer from other ARN to Nuvama Partners ARN will not qualify for the contest. Unique Investor (PAN) + Unique Scheme will be calculated as one SIP to arrive at the SIP Count
- The final data will be taken from RTA files. Nuvama Partners is not responsible for missing data in RTA files.
- The contest is valid for all the registered ARN holder of Nuvama Partners, with a valid EUIN & KYD for mutual fund business..
- Shortlisted Structured products will qualify for loyalty club points & will be communicated separately.
- Bonds and NCDs executed through Secondary Market will be considered on the basis of trades done and will be calculated on the face value of the Bond.
- Points for Unlisted Shares will be considered on the basis of trades done and will be calculated on the trade value of the shares.
- Demat & Trading account opened with Elite plan for the period 1st April 2022 to March 31st, 2023 will only be considered for Loyalty Points.
- Broking Revenue will be considered for Loyalty Club points after considering reversal if any.
- Allotment amount will be considered for calculating points for NCDs.
- Valid Number of applications will be considered for calculating points for Equity IPOs
- RTA/HFC data will be considered as final data for calculating points for this contest for all products.
- This contest is applicable for application procured under Nuvama Syndicate & Sub Syndicate code.
- The loyalty points are not transferable to any other products.
- To qualify for the Loyalty Club, Partner has to disburse the case.
- For Single case : HL & Mortgages loan amount up to 5 crs shall be capped for loyalty points
- All rights for denial of rewards/payouts in the loyalty for any actions by the DSA which are detrimental to the Nuvama Partners interest.
- All the cases disbursed between 1st April, 2022 – 31st March, 2023 shall be considered and Only successfully executed disbursement will be considered for Loyalty Points.
- Loyalty Club points will be considered on net disbursement value.
- Please note that the points displayed on platform are calculated for the transactions where commission/any referral fee has been processed. The transactions where commission/any referral fee processing is due will reflect once the payment cycle is completed. For mutual fund transactions, the points are calculated and displayed on the basis of procurement.
- Points for products available on referral model (time to time), will be calculated after it has been successfully executed.
- All the Mutual Fund application forms / transactions need to bear correct ARN and partner Code, ARN and EUIN of the channel partner. All other products should bear Partner code and Nuvama code in all transactions.
- For all MF transactions physical and online executed should have ARN 70892 mentioned.