nuvama wealth | partners

Loyalty Club

EVERY TRANSACTION HAS A POINT

Bronze	Silver	Gold	Platinum	Super Platinum
1+	3000+	10,000+	25,000	1,25,000
Points	Points	Points	Points	Points

Loyalty Club Reward Points FY26

Product	Business Volumes	Points	Product	Business Volumes	Points
Focused NCDs	1 Crore	5000	Mortgage	1 Crore	500
Structured Product	1 Crore	3000	Corp FD	1 Crore	500
AIF	1 Crore	3000	Other NCDs	1 Crore	250
Secondary Bonds	1 Crore	2000	RBI Bonds	1 Crore	200
PMS	1 Crore	2000	SGB	1 Crore	200
Broking NET Revenue	1 Lakhs	1200	54EC Bonds	1 Crore	100
MF Lump-sum	1 Crore	1000	SMTF Book Size / Month	1 Crore	100
Unlisted Equity (Ex- NSE)	10 Lakhs	1000	MF SIP	1 SIP	10

*Focused NCDs will be communicated separately.

Terms & Condition

- The terms and conditions of this Loyalty Club is applicable to Partners registered with Nuvama Wealth and Investment Limited.(NWIL). Partners has to be registered as Authorized Person (AP) for Broking and SLBM and EP (DSA) for other mentioned products. (as the case may be.)
- Only valid and executed/ settled deals, allotment(s) taking place during the Tenure in accordance with internal policies of Nuvama 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.
- Net Broking revenue is Nuvama's share, post partner passout, from the trades executed on Platforms of exchanges of Equity, Commodities, Currency segments by clients of an registered AP.
- The trades executed by Chain Remiser or other than own Partner code will not be clubbed and shall not be considered.
- SMTF book size per month to be considered while considering loyalty points, eligibility criteria – book size 50 lakhs and above for that month.
- Partner Grading will be calculated solely on the basis of current FY 2025-26 points only and carry forward points of previous FY25 will be excluded. All points added in FY26 will Qualify for Grading
- LoyaltyClub of FY24 will get lapsed post final redemption window of FY25 if not redeemed.
- Please note, this FY26 onwards minimum 2000 points will be needed for redemption.
- All points of previous financial year FY25 will be fully carried forward to next financial year FY26. NuvamaWealthPartners 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 NuvamaWealthPartners 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 NuvamaWealthPartners under any circumstances.
- This document is private and is intended for partner registered with NuvamaWealthPartners. 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 NuvamaWealthPartners.
- Only Equity & Hybrid Asset Categories scheme will qualify for Loyalty Club 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 1 Year & above. SIP worth Rs. 1000 and above will qualify for the contest.
- Switched from liquid to Equity & Hybrid schemes will qualify as fresh mobilization.
- STP – The net amount received in targeted scheme during the contest period will 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. NuvamaWealthPartners is not responsible for missing data in RTA files.
- The contest is valid for all the registered ARN holder of NuvamaWealthPartners, 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.
- Allotment amount will be considered for calculating points for NCDs.
- 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 Edelweiss 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 2025 – 31st March 2026 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 Edelweiss code in all transactions.
- For all MF transactions physical and online executed should have ARN 70892 mentioned.
- In case of redemption in mutual fund, PMS, Cat-3 AIFs, the points will be recovered / adjusted accordingly.
- In case any drawdown is pending in any AIF, the points will be recovered / adjusted accordingly.

Disclaimer

Broking services offered by Nuvama Wealth and Investment Limited (NWIL), is a 100% subsidiary of Nuvama Wealth Management Limited. Registered office & Corporate Office address of NWIL is at 8th Floor, 801-804, Wing A, Building No. 3, Inspire BKC, G Block, Bandra Kurla Complex, Bandra East, Mumbai 400051. It is a Member of National Stock Exchange of India Ltd (Member Code: 13116), BSE Ltd (Member Code: 3261), Multi Commodity Exchange of India Limited (Member Code: 56520), Metropolitan Stock Exchange (Member Code: 86100) and National Commodity and Derivatives Exchange Limited (Member Code: 01279) and having SEBI registration no. INZ000005231. Depository Participant SEBI Registration No.: IN-DP-656-2021 with NSDL having DP ID: IN302201 & IN303719 and with CDSL having DP ID: 12032300. Research services are offered by NWIL under SEBI Registration No. INH000011103. Name of the Compliance officer: Mr. Umesh Manglani, E-mail address: complianceofficer.nwil@nuvama.com.

Investments in securities market are subject to market risks, read all the related documents carefully before investing.

The contents herein shall not be considered as an invitation or persuasion to trade or invest. NWIL and affiliates accept no liabilities for any loss or damage of any kind arising out of any actions taken in reliance thereon. Please note Brokerage would not exceed the SEBI prescribed limit. NWIL also acts in the capacity of distributor for Products such as PMS, OFS, Mutual Funds, IPOs and/or NCD etc. All disputes with respect to the distribution activity, would not have access to Exchange investor redressal forum or Arbitration mechanism.

NWIL also acts in the capacity of distributor of Edelweiss Mutual Fund and other AMCs under AMFI Registration Number - 70892 and in capacity of a Corporate Agent; registered with IRDA having Licence number: CA0131. Mutual Fund Investments are subject to market risks. Please read all scheme related documents carefully before investing. Investment in the securities involves risks. The user is required to undergo risk profiling before investing. Guided view is indicative in nature and is based on the information provided by the user voluntarily. Each user of this information should make such investigation as it deems necessary to arrive at an independent evaluation of an investment in the securities of companies referred here (including the merits and risks involved) and should consult his own advisors to determine the merits and risks of such investment. Past performance is not necessarily a guide to future performance.

Trading Accounts would be open after all procedure relating to client registration, IPV and client due diligence is completed. Margin Trading facility is offered by NWIL in terms of the provisions of SEBI Circular CIR/MRD/D- P/54/2017 dated June 13, 2017, and the terms and conditions mentioned in rights and obligations statement issued.

For any grievance relating to Stock Broking/ DP operations, please call 040-41151621 or write to helpdesk; Email ID: helpdesk@nuvama.com (for trading related) and dpservicesnwil@nuvama.com (for demat related).

*Nuvama refers to Nuvama Wealth and Investment Limited

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