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Loyalty Club

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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 <small>(in Lakhs)</small>	FY24 POINTS
EWM NCD	100	5000
SP - Debt	100	5000
AIF	100	3500
PMS	100	3500
SP - Equity	100	3000
Secondary Bonds	100	2500
Broking Client ADB	1	2000
Broking Gross	1	2000
PMS - FD Beater	100	1000
MF LUMPSUM	100	1000
Unlisted Equity	10	1000
Corp FD	100	500
MORTGAGE	100	500
Other NCD	100	500
RBI Bonds	100	200
SGB	100	200
54EC Bonds	100	100
IPO (Apps)	100	50
Broking NCA	1	10
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:

- In case Nuvama Partners decides to extend the tenure of Loyalty Club, or carry forward the FY23 points, the unutilized reward points of Loyalty Club may be 100% carried forward by partners to next financial year FY24.
- 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 gifts 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 needs to ensure the accurate email id is registered with Nuvama Partners. Nuvama Partners shall not be responsible for any unauthorized use of e voucher by unknown recipient.
- Partner Grading will be determined solely on the basis of FY 2023-24 points and carry forward points of previous FY23 will be excluded. All points added in FY24 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 partner who is registered with Nuvama Partners.
- List of Qualifying MF Schemes will be available on platform and mailed to all partners. Please check it 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
- Switch from liquid to non-liquid will qualify as fresh mobilization (The target schemes must be from the list of schemes mentioned above).
- 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 to 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 2023 to March 31st, 2024 will only be considered for Loyalty Points.
- Broking Revenue will be considered for Loyalty Club points atier 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 Rs. 5 crs shall be capped for loyalty points
- Nuvama partners has all rights for denial of rewards/payouts in the loyalty club for any actions by the DSA which is detrimental to the Nuvama Partners interest.
- All the cases disbursed between 1st April, 2023 – 31st March, 2024 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 platiorm 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 atier it has been successfully executed.
- All the Mutual Fund application forms / transactions need to bear correct ARN and partner code belonging to Nuvama Wealth along with ARN and EUIN of the channel partner. All other products should bear Partner code and Nuvama code in all transactions.
- For all MF transactions executed physically and online should have ARN 70892 mentioned