

We want to introduce "SYSTEMATIC PLAN – EXPIRING SHORTLY" with various options & utilities.

SYSTEMATIC PLAN – EXPIRING SHORTLY

INTRODUCTION:

By investing a uniform amount regularly one can buy more when stock markets are down and less when stock markets are up. It is an efficient way to participate in equity markets, especially in high volatile stock market without taking high amount of risk.

Importance Of This Report:

- ❖ **From Date and To Date:** Select a particular period to determine all those systematic plans (viz. daily / weekly / monthly) that expire between the selected period range.
- ❖ **AMC Name:** Select the names of the AMC for which systematic plans are expiring within the selected period range.
- ❖ **Scheme Name:** Select the names of the Scheme for which systematic plans are expiring within the selected period range.
- ❖ **Investor Name:** Select the names of the client for whom systematic plans are expiring within the selected period range.
- ❖ **Date wise & Scheme wise** are two sorting methods available for this report.

➤ **SYSTEMATIC PLAN – EXPIRING SHORTLY: Date wise Report**

This report will show the Investor Name, Scheme Name, Folio No., Cease Date (If Any) and the SIP Amount for all those dates that fall between the period range selected for generating the report.

Where,

- ❖ **Cease Date** means the date when SIP account has been closed abnormally.
- ❖ **SIP Amount** indicates amount paid by you every month for a selected period of time.

➤ **SYSTEMATIC PLAN – EXPIRING SHORTLY: Scheme wise Report**

This report will show the Investor Name, Folio No., Cease Date, Term Date and the SIP amount Scheme Wise for the period range selected.

Where,

- ❖ **Term Date** indicates expiring date of SIP.

Hope above information will become helpful to you to communicate more effectively with your clients in this current adverse situation. For further any queries kindly contact us. We are always ready to serve our valuable clients.