

## **Terms and Conditions: Green Portfolio Private Limited**

By ordering services, you are agreeing to these Terms & Conditions

1. M/s Green Portfolio Private Limited shall have no responsibility for any loss incurred from services, decisions/ actions taken on the market for stock transactions, the information provided here is based on our knowledge and we do not ask/force you to take market positions in any particular investment.
  2. This is no guaranteed return product or service. Markets are of risk and can never be eliminated. As per SEBI guidelines, we cannot guarantee the returns too.
  3. Our clients (Paid or Unpaid), Any third party or anyone else have no rights to forward or share our investment ideas or SMS or Report or Any Information provided by us to / with anyone which is received directly or indirectly by them. If found so then Legal Actions can be taken.
  4. M/s Green Portfolio Private Limited and their owners, partners, employees, affiliates, agents, representatives or subcontractors) shall not be liable for any loss or liability resulting, directly or indirectly, from delays or interruptions due to electronic or mechanical equipment failures, telephone interconnect problems, defects, weather, strikes, walkouts, fire, acts of God, riots, armed conflicts, acts of war, or other like causes.
  5. Handling complaints: if you have any complaints regarding Services received from us, please send us an email to [info@greenportfolio.co](mailto:info@greenportfolio.co) or call us at 9971133005 detailing the nature of your complaint. We will try to respond to the Complaint within 10 working days. All complaints will be considered highly confidential, and will be dealt as soon as possible.
- Investors can also visit the website of the Company for details about the Investor Grievance Redressal Mechanism followed by the Company at [www.greenportfolio.co](http://www.greenportfolio.co) - Investor Resources.
6. Unauthorized attempts to upload information, change or delete information on our website or smallcase or online are strictly prohibited and punishable under Information Technology Act, 2000.
  7. REFUND & CANCELLATION POLICY: All sales are final. There will be ABSOLUTELY NO REFUNDS and CANCELLATIONS subject to certain exceptions.
  8. Once the service starts then deposited fee is not refundable. Know your client and risk profiling is also the part of process. Execution of services is not our concern.
  9. We are SEBI Registered Research Analyst registered under SEBI Research Analyst Regulations, 2014 vide Registration number INH100008513 and, also SEBI registered Portfolio Managers

(PMS) registered under SEBI (Portfolio Managers) Regulations, 2020 vide Registration No. INP000006022

10. Payment of fee will only be through online or proper banking channel. No cash receipt will be accepted. The Amount of fee is the consideration for our services. We received your express and implied consent on the point that Fee is reasonable and fair for you.

11. We are not bound and liable for your market loss as profits and losses in equity are subjected to market risk. We are not responsible for any future liability arise under Prevention and Money Laundering Act, 2002 and other similar Act, Regulation, and rules.

12. We advise in stocks as per SEBI (Research Analyst) Regulations, 2014.

13. We provide advice through our registered email (i.e. [info@greenportfolio.co](mailto:info@greenportfolio.co)) or through [smallcase.com](http://smallcase.com) platform only. Please do not act on the advice which is not provided through above.

14. We never provide service wherein we use terms / give assurance such as profit sharing, guaranteed profit, Sureshot, Jackpot etc.

15. All research that we conduct is basis detailed Fundamental research, Technical analysis and Primary market analysis. Our qualified, seasoned and dedicated research team continuously research on the stocks covered. We have models and methods to decide upon stocks and their buy sell prices. Though this has worked well in the past but past performance may or may not sustain in future.

16. Green Portfolio retains all rights to change the subscription plans and pricing as per its own will. However the same shall not be applicable to clients on retrospective basis.

17. Green Portfolio retains rights to restrict the maximum capital / net worth that can be invested in its smallcases by its subscribers and the same can be changed without a prior intimation to the client.

## **SERVICE AGREEMENT DISCLOSURES**

1. Green Portfolio and the Client hereby confirm and agree that they shall execute an Agreement as per the terms prescribed by the Securities and Exchange Board of India (SEBI).

2. The Client hereby represents and warrants to Green Portfolio that he/she wants to avail the investment research services only for himself / herself and not for any other person.

## THIRD-PARTY DISCLOSURES

1. The Service Provider has a contractual arrangement with a vendor Smallcase Technologies Private Limited (STPL); whereby STPL provides technology solutions and related back-end infrastructure and support for back-office related operations & processes. It also facilitates transactions in securities from the website and/or mobile application of the Service provider.
2. The personal data obtained or provided by the Client or obtained from other sources on Client's behalf will be held, disclosed and processed by the Green Portfolio Private Limited for the purposes of offering its services to the client. Thus by agreeing to enter into this agreement, the client accepts the personal data collection and use of such personal data for the purposes of this agreement. The client also agrees to the detailed privacy policy available on [www.greenportfolio.co](http://www.greenportfolio.co) that provides all the lawful uses of client's personal data and other privacy policy.
3. Neither party as mentioned herein above shall during the continuance of this agreement or after the termination, disclose to any person (except with the authority of other party or as required by the applicable law / regulation / order of the competent court) any information relating to the client's financial / personal / any other information of confidential nature, unless it is required to do so with the consent of the client in question or mandatorily required under any statute / law.
4. Sharing of information within the organisation or to its affiliates for the sole purpose of providing the services or other services incidental thereto shall not be construed as breach of confidential obligation which Green Portfolio Private Limited is subject to.