

Terms and Conditions Agreement

Hereon, in this agreement, the term “I/Me/My/We” refers to “the client(s)” and the term “RA/he/his/him” refers to “Sreenivasa Sarma Bahagavathula, a SEBI registered Research Analyst with Registration Number INH000013439”.

1. Availing the research services: By accepting delivery of the research service, I confirm that I have elected to subscribe to the research service of the RA at my sole discretion. RA confirms that research services shall be rendered in accordance with the applicable provisions of the RA Regulations.

2. Obligations on RA: RA and I shall be bound by SEBI Act and all the applicable rules and regulations of SEBI, including the RA Regulations and relevant notifications of Government, as may be in force, from time to time.

3. Client Information and KYC: I shall furnish all such details in full as may be required by the RA in its standard form with supporting details, if required, as may be made mandatory by RAASB/SEBI from time to time.

RA shall collect, store, upload and check KYC records of me with KYC Registration Agency (KRA) as specified by SEBI from time to time.

4. Standard Terms of Service:

I / We have read and understood the terms and conditions applicable to a research analyst as defined under regulation 2(1)(u) of the SEBI (Research Analyst) Regulations, 2014, including the fee structure.

I/We are subscribing to the research services for our own benefits and consumption, and any reliance placed on the research report provided by the research analyst shall be as per our own judgement and assessment of the conclusions contained in the research report.

I/We understand that –

i. Any investment made based on the recommendations in the research report are subject to market risk.

ii. Recommendations in the research report do not provide any assurance of Returns.

iii. There is no recourse to claim any losses incurred on the investments made based on the recommendations in the research report.

Declaration of the RA:

i. Sreenivasa Sarma Bahagavathula, the RA, is duly registered with SEBI as an RA pursuant to the SEBI (Research Analysts) Regulations, 2014 and its registration details are:

Name of the RA : Sreenivasa Sarma Bahgavathula

SEBI Registration Number : INH000013439

Date of Registration : 16/October/2023

ii. The RA has registration and qualifications required to render the services contemplated under the RA Regulations, and the same are valid and subsisting;

iii. Research analyst services provided by the RA do not conflict with or violate any provision of law, rule or regulation, contract, or other instrument to which it is a party or to which any of its property is or may be subject;

iv. The maximum fee that may be charged by RA is ₹1.51 lakhs per annum per family of client.

v. The recommendations provided by RA do not provide any assurance of returns.

The RA declaration :

The RA is not engaged in any additional professional or business activities, on a whole-time basis or in an executive capacity, which interfere with/influence or have the potential to interfere with/influence the independence of research report and/or recommendations contained therein.

5. Consideration and mode of payment: I shall duly pay to the RA, the agreed fees for the services that RA renders to the client and statutory charges, as



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applicable. Such fees and statutory charges shall be payable through the specified manner and mode(s)/ mechanism(s).

6. Risk factors: I understand that the equity investments are associated with risk of losing the capital. The RA has informed me about the risks prior to my investments in the recommended equities.

7. Conflict of interest: The RA shall adhere to the applicable regulations/ circulars/ directions specified by SEBI from time to time in relation to disclosure and mitigation of any actual or potential conflict of interest.

8. Termination of service and refund of fees: The RA may suspend or terminate rendering of research services to client on account of suspension/ cancellation of registration of RA by SEBI and shall refund the residual amount to the client. In case of suspension of certificate of registration of the RA for more than 60 (sixty) days or cancellation of the RA registration, RA shall refund the fees, on a pro rata basis for the period from the effective date of cancellation/ suspension to end of the subscription period.

9. Grievance redressal and dispute resolution: Any grievance related to (i) non-receipt of research report or

(ii) missing pages or inability to download the entire report, or

(iii) any other deficiency in the research services provided by the RA, shall be escalated promptly by the client to the person/employee designated by the RA, in this behalf

Name of the Authority : Sreenivasa Sarma Bhagavathula, Research Analyst.

Email ID : marketmarvels@gmail.com

Mobile Number : +91-8341880260

The RA shall be responsible to resolve grievances within 7 (seven) business working days or such timelines as may be specified by SEBI under the RA Regulations.

The RA shall redress grievances of the client in a timely and transparent manner.



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Any dispute between the RA and Me may be resolved through arbitration or through any other modes or mechanism as specified by SEBI from time to time.

10. Additional clauses: All additional voluntary clauses added by the RA should not be in contravention with rules/ regulations/ circulars of SEBI. Any changes in such voluntary clauses/document(s) shall be preceded by a notice of 15 days.

11. Mandatory notice: Clients shall be requested to go through Do's and Don'ts while dealing with RA as specified in SEBI master circular no. SEBI/HO/MIRSD-POD-1/P/CIR/2024/49 dated May 21, 2024 or as may be specified by SEBI from time to time.

12. Most Important Terms and Conditions (MITC): RA shall also disclose MITC to their clients which shall be standardised by Industry Standards Forum (ISF) in consultation with SEBI and RAASB. RAs/research entity shall also include the following disclosure as part of the terms and conditions in their MITC:

The terms and conditions and the consent thereon are for the research services provided by the RA and RA cannot execute/ carry out any trade (purchase/ sell transaction) on behalf of me. Thus, I am aware and advised not to permit RA to execute any trade on my behalf.

Place:

Signature of the Client

Date :

(Name of the Client)