Beyond Trading

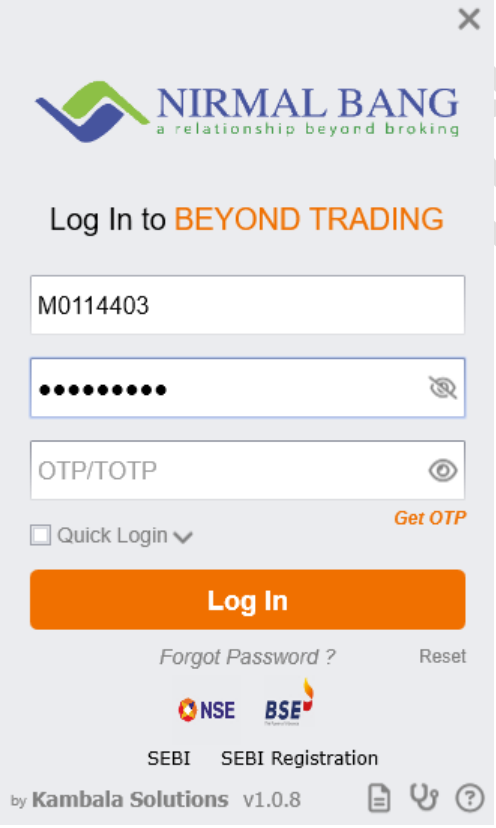
Contents

1 Overview

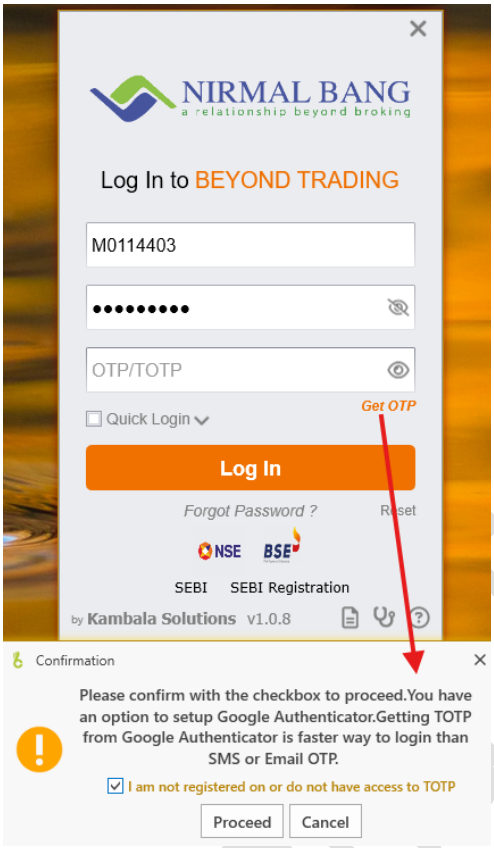
Beyond Trading is a next-generation, comprehensive trading platform designed to meet the evolving needs of today's elite investors and active traders. Equipped with real-time market data, advanced charting tools, and a suite of sophisticated features, Beyond Trading delivers a seamless and intuitive trading experience. Whether you're navigating equities, derivatives, or commodities, the platform empowers users with the insights and agility required to make informed decisions in dynamic market conditions.

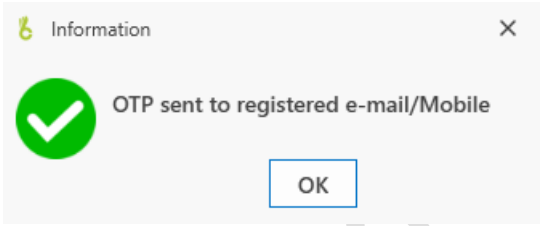
2 Login Screen

User can access the system only by using a **user id and password** which should be minimum 8 characters in length, contains Uppercase Letters and number. User need to compulsorily change the password in every 14 days and every time after fresh password generation. Two-factor authentication (2FA) is also implemented to ensure secure access to the application.

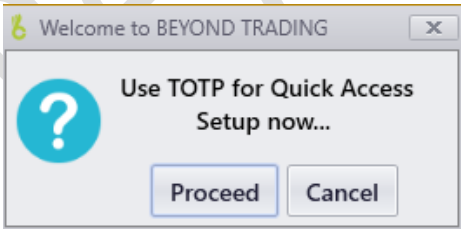


- **OTP based login**



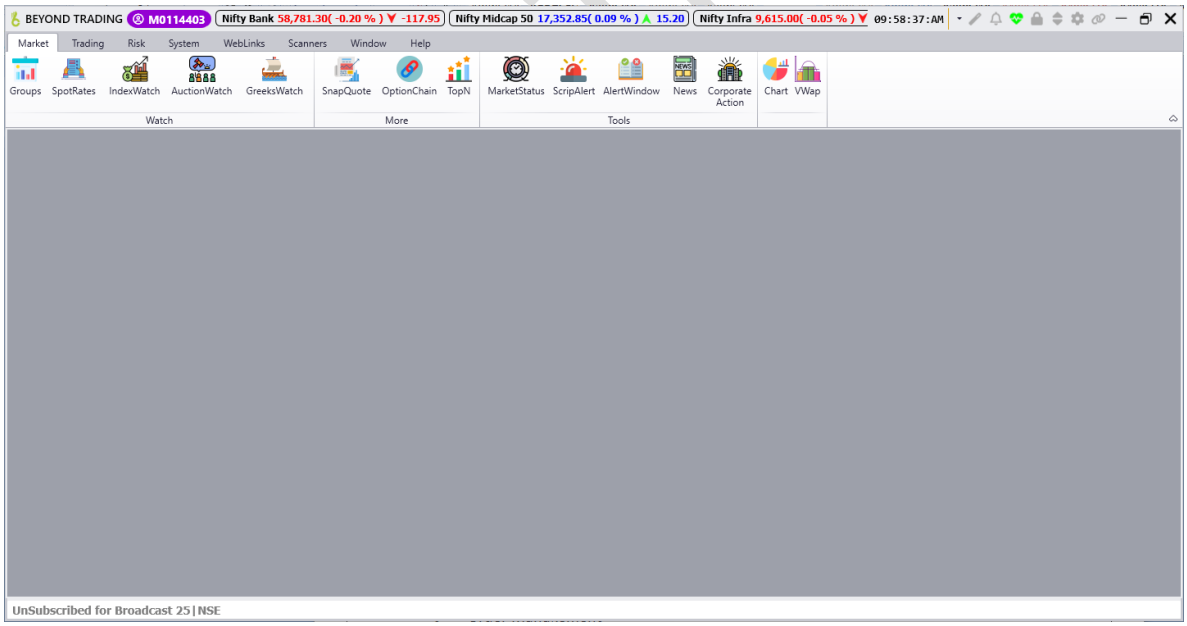


- **TOTP based login** – To enable Time-based One-Time Password (TOTP) authentication, the user must first complete a standard OTP-based login. Upon successful login, a prompt will appear guiding the user to enable TOTP. To proceed, the user should click on the **'Proceed'** button displayed on the screen.

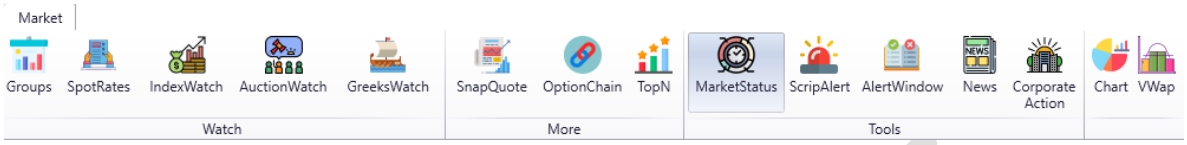


A QR code will be displayed, which the user must scan using the **'Google Authenticator'** app, available on both the Play Store and App Store. TOTP can be used from next run onwards to do application login.

After successful login, you are good to go. Let us dive into the application features.



3 Market Menu

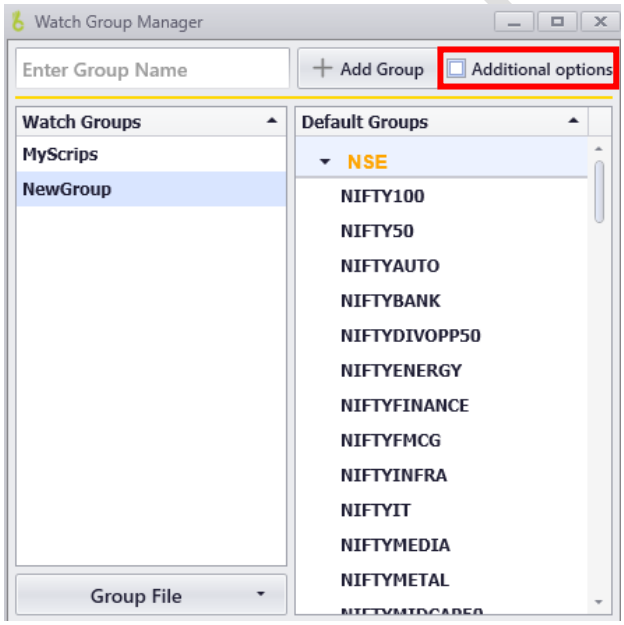


3.1 Groups

Users can either load default group watchlists or create their own custom watchlists using the **'Groups → Add Group'** option.

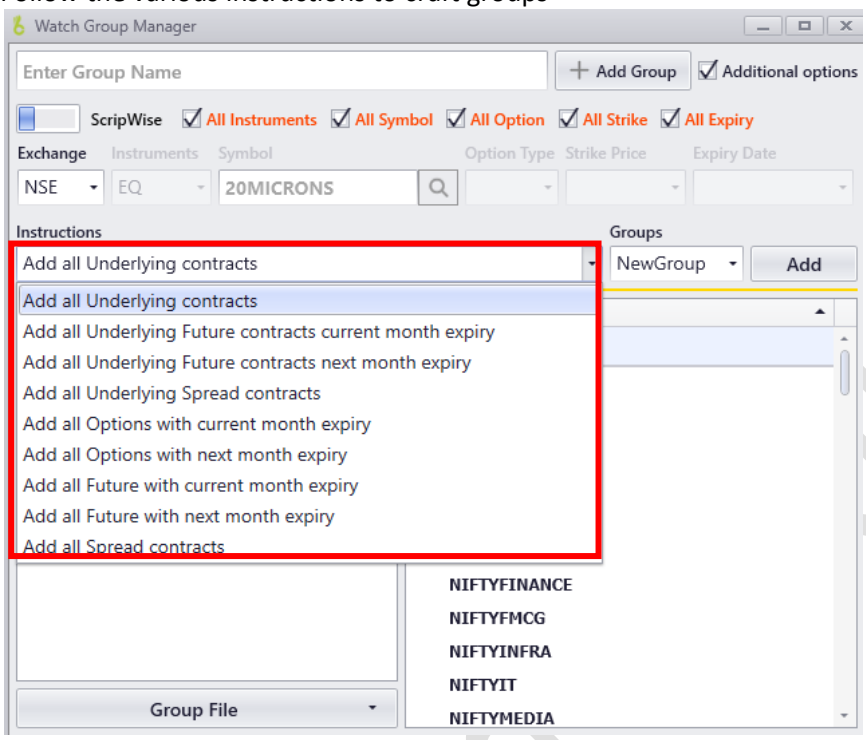
Enter group name and click 'Add Group' to create custom group or directly click on 'Default Groups' to create watchlist with default scrip groups.

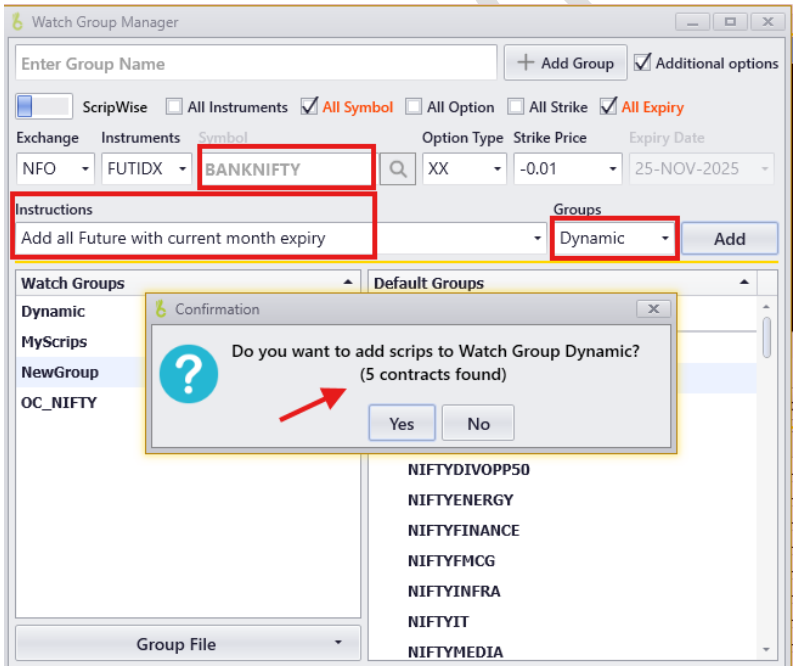
This versatile feature allows users to organize scrips across multiple market segments—such as Equity, Derivatives, Currency, and Commodities—based on their preferences. Additionally, individual scrips can be manually selected and added to any group, offering complete flexibility in watchlist customization.



Enabling the **'Additional Options'** checkbox enhances the basic 'Add Group' form, allowing users to create a wider variety of group configurations across available market segments. This feature provides greater flexibility and control in customizing watchlists and organizing scrips.

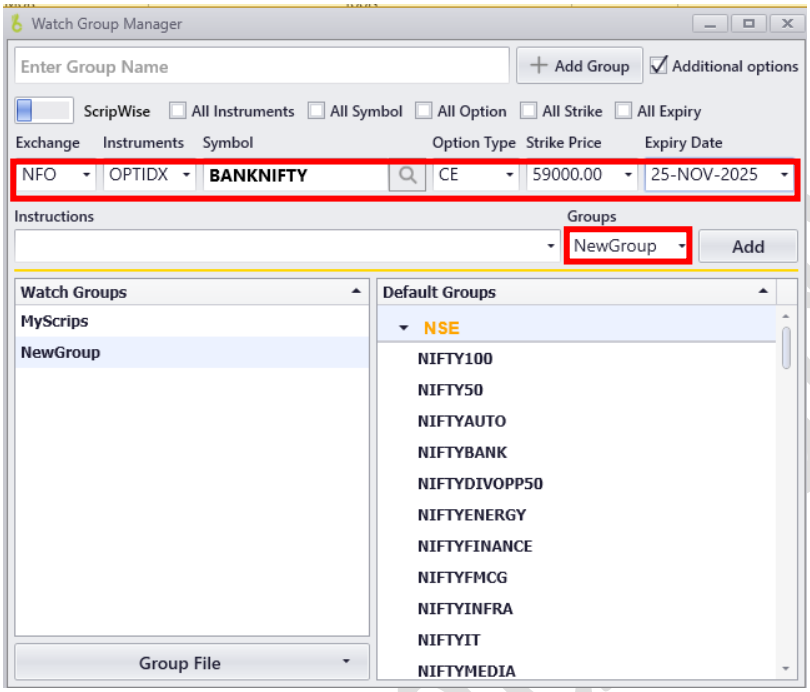
Follow the various instructions to craft groups





Specific scrip selection is also easy to perform in selected custom groups

Note – Default group modification is not possible

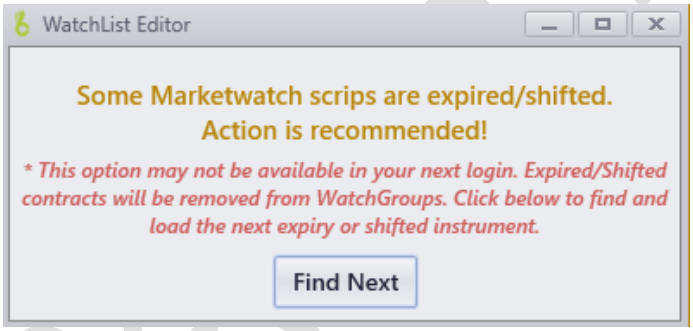


Market Watch (F4)

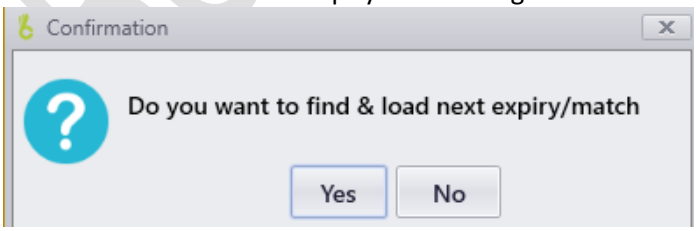
In market watch, user can

- Add symbols across active exchanges, use the **'Scrip Search Bar'** located at the top of the Market Watch (highlighted)
- To arrange columns order, **right-click on the header row** of the Market Watch and select **'Column Chooser'**. This allows you to add, remove, or reorder columns.
- Reorder scrips in the Market Watch window by simply **dragging and dropping rows** as per preference.
- To visually group related scrips in the Market Watch, users can **insert a blank row** between them (Select location and click 'Insert').
- A **green upward arrow** in the **'High'** column indicates that the scrip has hit a **new 52-week high** during the current trading session.
- A **red downward arrow** in the **'Low'** column signifies that the scrip has touched a **new 52-week low** today.
- Click  symbol on top line to see '**Heatmap**' for the current open watch scrips
- **Expiry contract shifting for derivative watches** - After contract expiry, the application automatically prompts users to **switch to the next available expiry** for the expired contract. This ensures uninterrupted tracking and trading continuity.

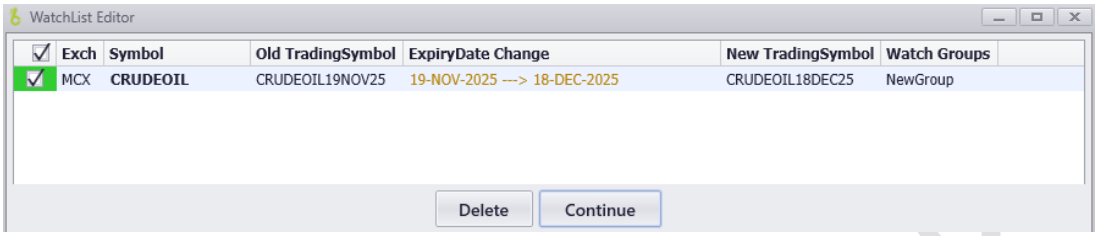
Click 'Find Next'



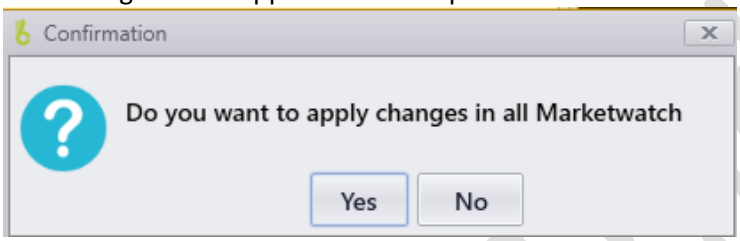
Click 'Yes' to shift to next expiry or 'No' to ignore



Application automatically displays the **next available expiry contracts** for the expired symbol and click 'Continue'.



Final change will be applied to the respective watchlist on clicking'Yes'

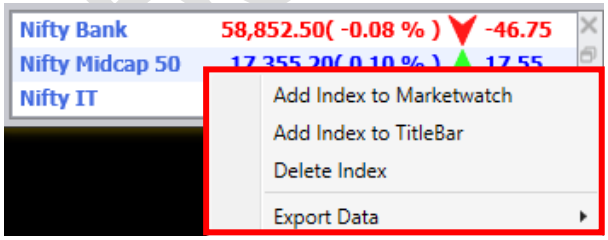


3.2 Spot Rate

As the name suggests, the Spot Rate widget is a compact and convenient tool designed to monitor selected spot indices in real time. By default, it displays the Nifty 50 and Nifty Bank spot rates for quick reference.

Users can customize this widget by adding additional indices of their choice. To do so, navigate to 'Index Watch'-> Right-click-> 'Add Index'.

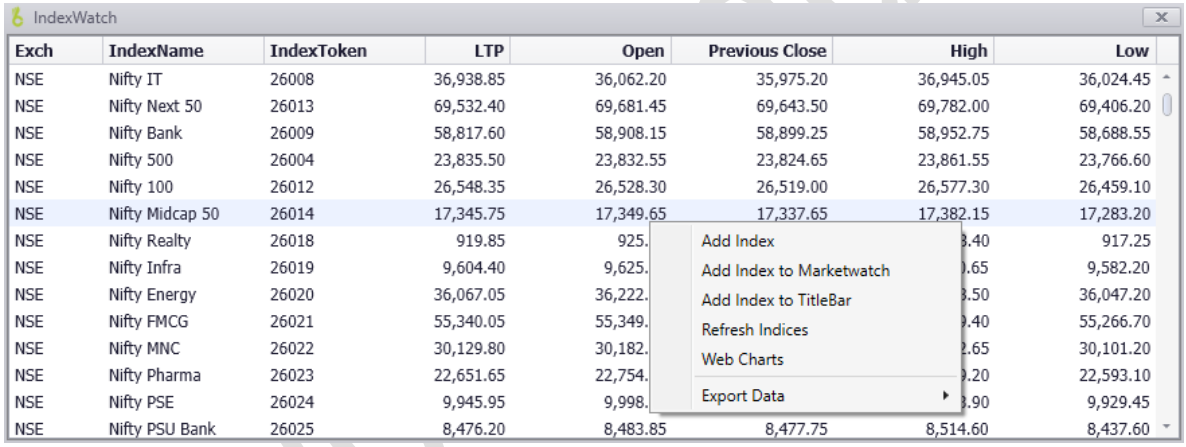
Few functions are available in right click menu to manage 'Spot Rate'



Add Index to MarketWatch – Add selected spot to active custom watch
Add Index to title bar – Add selected spot to top row (Max 5 spots can be added at the top)
Delete Index – Delete selected index from 'Spot Rate'
Export Data – Export all records

3.3 IndexWatch

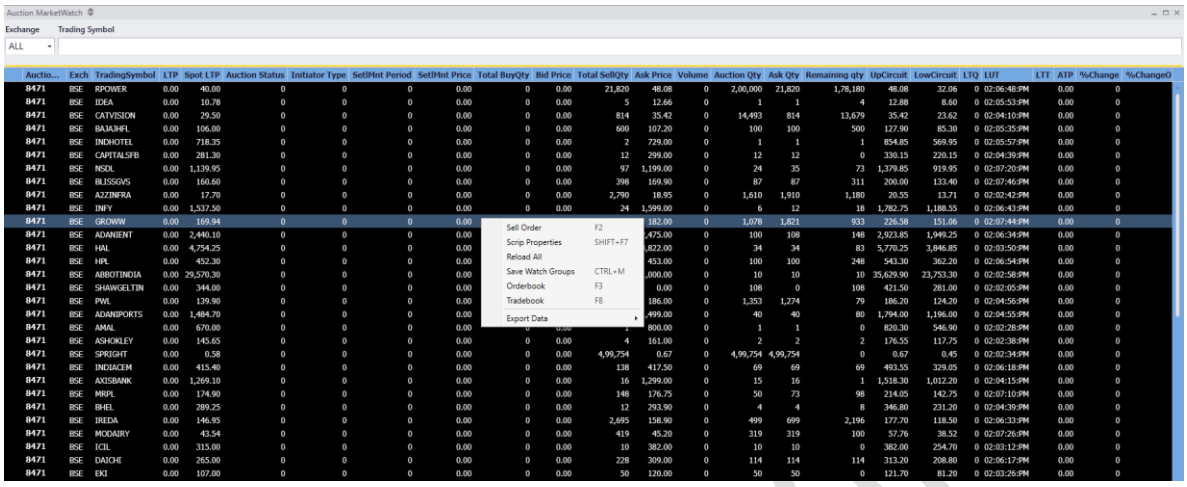
All major indices from **NSE** and **BSE** are consolidated into a single, streamlined window, providing users with **real-time updates** on market movements. This unified view enables quick monitoring of benchmark indices such as **Nifty 50**, **Sensex**, **Bank Nifty**, and sectoral indices, ensuring efficient access to live data for informed decision-making. Few operation are provided in right click menu as shown.



Exch	IndexName	IndexToken	LTP	Open	Previous Close	High	Low
NSE	Nifty IT	26008	36,938.85	36,062.20	35,975.20	36,945.05	36,024.45
NSE	Nifty Next 50	26013	69,532.40	69,681.45	69,643.50	69,782.00	69,406.20
NSE	Nifty Bank	26009	58,817.60	58,908.15	58,899.25	58,952.75	58,688.55
NSE	Nifty 500	26004	23,835.50	23,832.55	23,824.65	23,861.55	23,766.60
NSE	Nifty 100	26012	26,548.35	26,528.30	26,519.00	26,577.30	26,459.10
NSE	Nifty Midcap 50	26014	17,345.75	17,349.65	17,337.65	17,382.15	17,283.20
NSE	Nifty Realty	26018	919.85	925.		.40	917.25
NSE	Nifty Infra	26019	9,604.40	9,625.		.65	9,582.20
NSE	Nifty Energy	26020	36,067.05	36,222.		.50	36,047.20
NSE	Nifty FMCG	26021	55,340.05	55,349.		.40	55,266.70
NSE	Nifty MNC	26022	30,129.80	30,182.		.65	30,101.20
NSE	Nifty Pharma	26023	22,651.65	22,754.		.20	22,593.10
NSE	Nifty PSE	26024	9,945.95	9,998.		.90	9,929.45
NSE	Nifty PSU Bank	26025	8,476.20	8,483.85	8,477.75	8,514.60	8,437.60

3.4 AuctionWatch

The Auction Watch window provides a live view of securities undergoing auction-based trading sessions, such as illiquid scrip auctions, short delivery auctions, or special pre-open sessions. It displays real-time updates on auctioned stocks, including symbol, auction price range, bid quantity, and indicative price. This tool is essential for traders and dealers who actively monitor auction opportunities or manage risk around auction settlements.



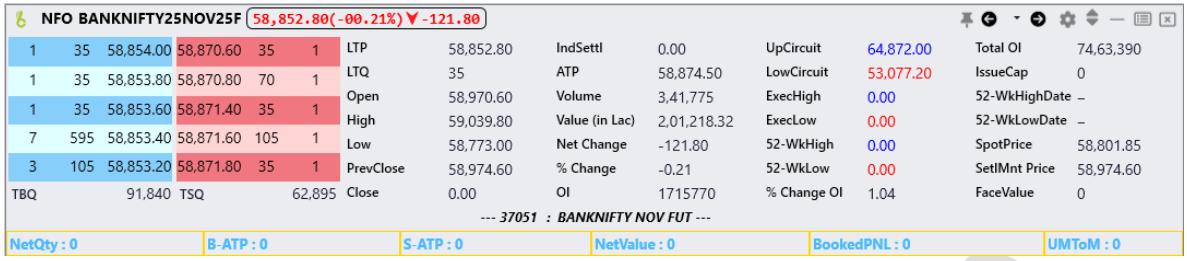
3.5 GreeksWatch

GreeksWatch is a specialized tool designed to provide real-time visibility into key option Greeks—**Delta, Gamma, Theta, Vega, and Rho**—across selected option contracts. It helps traders assess the sensitivity of option prices to market variables such as underlying price movement, time decay, and volatility.

Users can filter contracts by symbol, expiry, and strike, and monitor live updates to Greeks for dynamic risk analysis and strategy refinement.

3.6 SnapQuote

The SnapQuote utility offers traders a detailed, real-time snapshot of any selected scrip or contract. It provides full visibility into demand and supply dynamics, along with key market parameters such as LTP, bid/ask prices, volume, open interest, and day's range—all in one compact view.

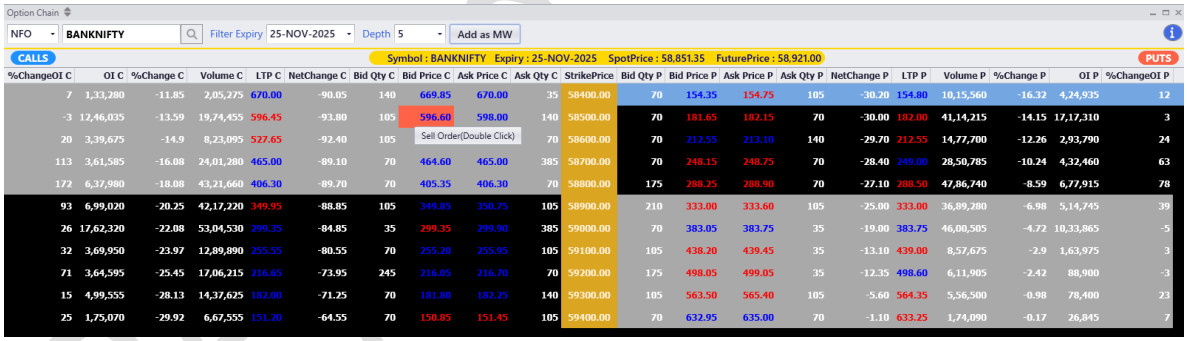


If the user holds an active position in the selected scrip, the bottom panel of SnapQuote displays the live status of that position, including net quantity, average price, and unrealized P&L. This contextual insight helps traders make faster, more informed decisions without switching screens.

User can invoke SnapQuote by double clicking selected scrip or use shortcut F6

3.7 OptionChain

The **Option Chain** window provides a structured and real-time overview of all available **Call and Put option contracts** for a selected underlying asset. It displays key parameters such as **strike price, LTP, bid/ask prices, volume, open interest, IV (Implied Volatility), and Greeks**—organized in a tabular format for easy comparison.



Traders can use this tool to:

- Analyze market sentiment and liquidity across strikes and expiries.
- Identify potential trading opportunities based on volatility and open interest shifts.
- Monitor live updates for intraday decision-making and strategy execution.

Select symbol, expiry and no of steps to view in Option chain.

Use ‘Add as MW’ to save entire option chain as market watch.

Note shortcuts to work with option chain

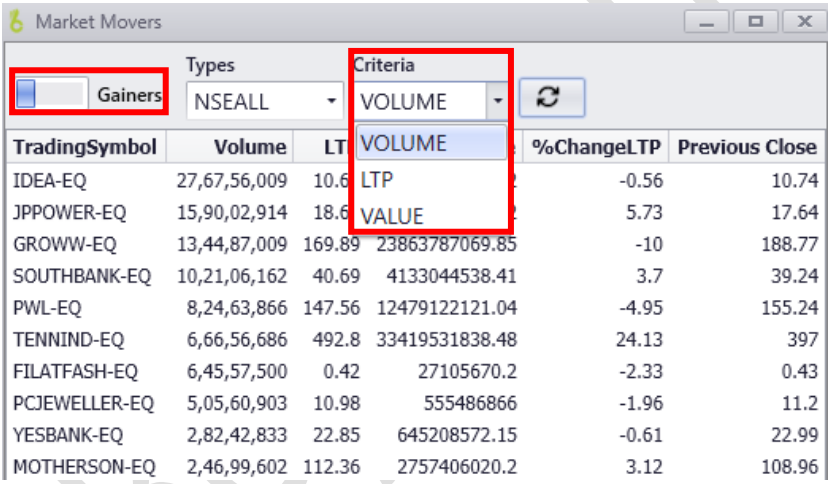
- Double click Bid Price/Bid Qty invokes 'Sell' order form
- Double click Ask Price/Ask Qty invokes 'Buy' order form
- Double click Strike Price column invokes SnapQuote for selected strike

3.8 TopN

The TopN Form provides a dynamic view of top-performing or underperforming scrips based on predefined market criteria such as **LTP, Volume, and Value etc**. It enables users to quickly identify trending stocks, active contracts, or unusual activity across segments.

View top records for selected criteria and arrange records accordingly.

- Select **Types** to choose required scrip horizon
- Select **Gainers/Losers**
- Select the predefined **Criteria** from the dropdown



TradingSymbol	Volume	LT		%ChangeLTP	Previous Close
IDEA-EQ	27,67,56,009	10.6		-0.56	10.74
JPPOWER-EQ	15,90,02,914	18.6		5.73	17.64
GROWW-EQ	13,44,87,009	169.89	23863787069.85	-10	188.77
SOUTHBANK-EQ	10,21,06,162	40.69	4133044538.41	3.7	39.24
PWL-EQ	8,24,63,866	147.56	12479122121.04	-4.95	155.24
TENNIND-EQ	6,66,56,686	492.8	33419531838.48	24.13	397
FILATFASH-EQ	6,45,57,500	0.42	27105670.2	-2.33	0.43
PCJEWELLER-EQ	5,05,60,903	10.98	555486866	-1.96	11.2
YESBANK-EQ	2,82,42,833	22.85	645208572.15	-0.61	22.99
MOTHERSON-EQ	2,46,99,602	112.36	2757406020.2	3.12	108.96

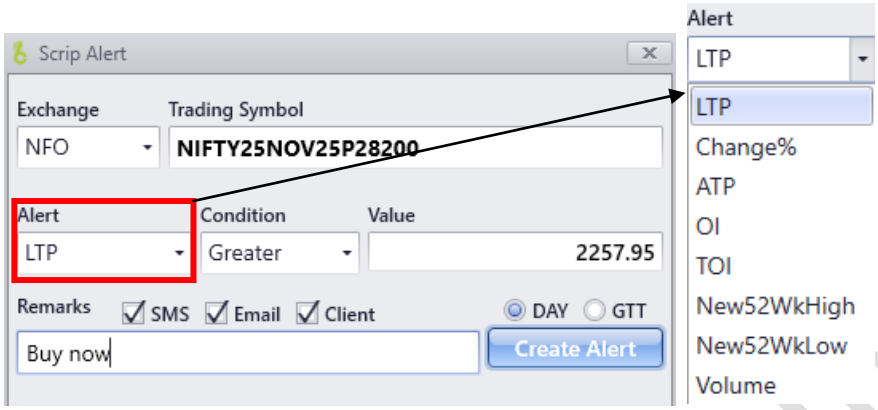
3.9 MarketStatus

Market status form shows all available markets with its current working status.

3.10 ScripAlert (Shift+F11)

The Scrip Alert form allows users to set up real-time alerts for specific trading symbols based on predefined alert types like LTP/ATP/OI/Change%/Volume etc.

Users can select active trading symbol across segments and define the alert condition using parameters such as LTP/ATP , comparison logic as Greater/Lesser, and target value.



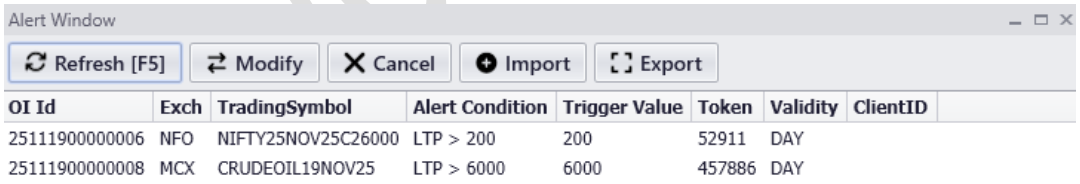
Additional features include:

- Remarks field for custom notes (e.g., “Buy now”).
- Notification options via SMS, Email, or Client pop-up.
- Alert type selection: DAY (valid for the day) or GTT (Good Till Triggered).

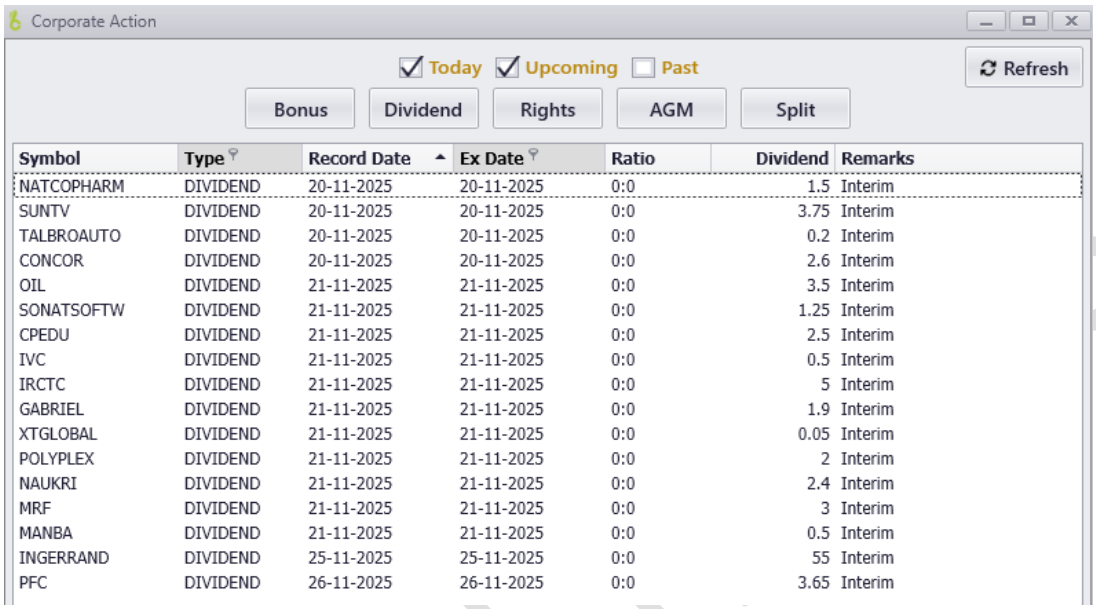
3.11 AlertWindow

All configured alerts are held in the AlertWindow, where users can view and manage pending triggers. This interface allows users to modify, cancel, or review alert conditions before they are triggered.

Note: To view the latest status of alerts, users must perform a Manual Refresh. Real-time updates are not auto-synced.



3.12 Corporate Action



Symbol	Type	Record Date	Ex Date	Ratio	Dividend	Remarks
NATCOPHARM	DIVIDEND	20-11-2025	20-11-2025	0:0	1.5	Interim
SUNTV	DIVIDEND	20-11-2025	20-11-2025	0:0	3.75	Interim
TALBROAUTO	DIVIDEND	20-11-2025	20-11-2025	0:0	0.2	Interim
CONCOR	DIVIDEND	20-11-2025	20-11-2025	0:0	2.6	Interim
OIL	DIVIDEND	21-11-2025	21-11-2025	0:0	3.5	Interim
SONATSOFTW	DIVIDEND	21-11-2025	21-11-2025	0:0	1.25	Interim
CPEDU	DIVIDEND	21-11-2025	21-11-2025	0:0	2.5	Interim
IVC	DIVIDEND	21-11-2025	21-11-2025	0:0	0.5	Interim
IRCTC	DIVIDEND	21-11-2025	21-11-2025	0:0	5	Interim
GABRIEL	DIVIDEND	21-11-2025	21-11-2025	0:0	1.9	Interim
XTGLOBAL	DIVIDEND	21-11-2025	21-11-2025	0:0	0.05	Interim
POLYPLEX	DIVIDEND	21-11-2025	21-11-2025	0:0	2	Interim
NAUKRI	DIVIDEND	21-11-2025	21-11-2025	0:0	2.4	Interim
MRF	DIVIDEND	21-11-2025	21-11-2025	0:0	3	Interim
MANBA	DIVIDEND	21-11-2025	21-11-2025	0:0	0.5	Interim
INGERRAND	DIVIDEND	25-11-2025	25-11-2025	0:0	55	Interim
PFC	DIVIDEND	26-11-2025	26-11-2025	0:0	3.65	Interim

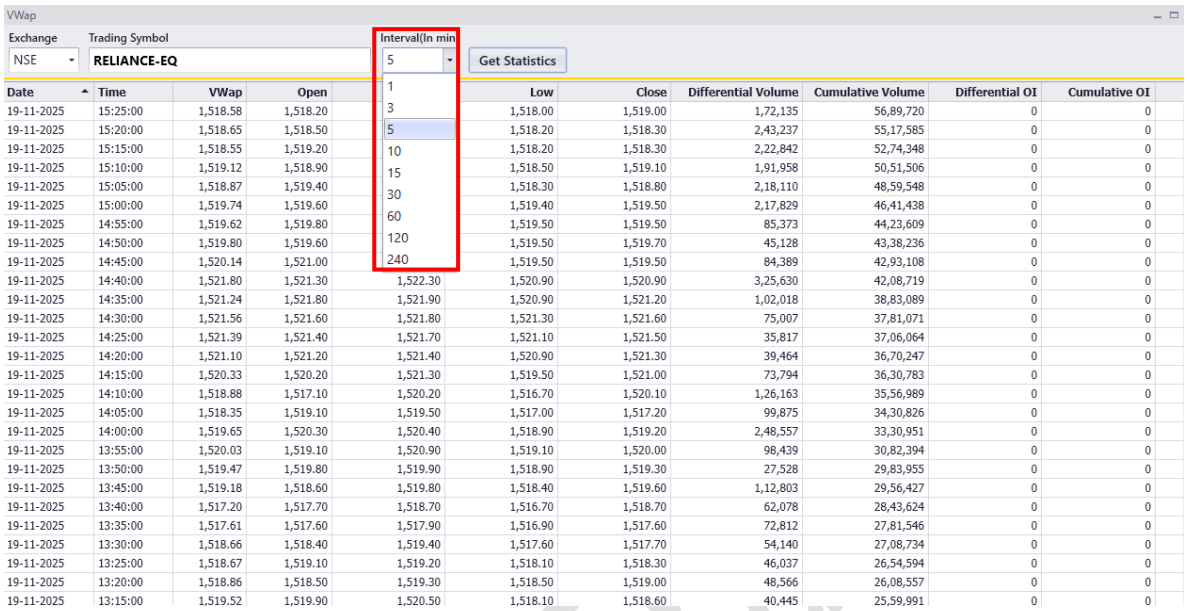
3.13 Chart (Shift+C)

The **Chart** module (TradingView) in Beyond Trading offers powerful, real-time visualizations of price movements across equities, derivatives, and commodities. It supports multiple timeframes, technical indicators, and drawing tools to help traders perform detailed **trend analysis.**

A chart empowers traders to make data-driven decisions with precision and confidence.

3.14 VWap

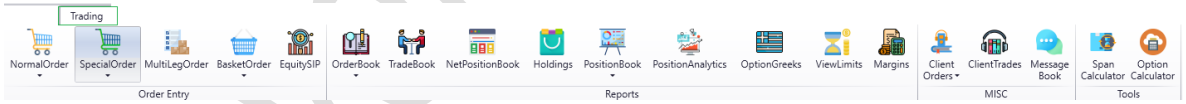
The **VWAP (Volume Weighted Average Price)** feature in Beyond Trading provides **real-time VWAP values** for the selected scrip, calculated over the **user-defined time interval** (e.g., 1 min, 5 min, 15 min). This helps traders assess the average price at which a security has traded, weighted by volume, within that interval.



Date	Time	VWap	Open		Low	Close	Differential Volume	Cumulative Volume	Differential OI	Cumulative OI
19-11-2025	15:25:00	1,518.58	1,518.20		1,518.00	1,519.00	1,72,135	56,89,720	0	0
19-11-2025	15:20:00	1,518.65	1,518.50		1,518.20	1,518.30	2,43,237	55,17,585	0	0
19-11-2025	15:15:00	1,518.55	1,519.20		1,518.20	1,518.30	2,22,842	52,74,348	0	0
19-11-2025	15:10:00	1,519.12	1,518.90		1,518.50	1,519.10	1,91,958	50,51,506	0	0
19-11-2025	15:05:00	1,518.87	1,519.40		1,518.30	1,518.80	2,18,110	48,59,548	0	0
19-11-2025	15:00:00	1,519.74	1,519.60		1,519.40	1,519.50	2,17,829	46,41,438	0	0
19-11-2025	14:55:00	1,519.62	1,519.80		1,519.50	1,519.50	85,373	44,23,609	0	0
19-11-2025	14:50:00	1,519.80	1,519.60		1,519.50	1,519.70	45,128	43,38,236	0	0
19-11-2025	14:45:00	1,520.14	1,521.00		1,519.50	1,519.50	84,389	42,93,108	0	0
19-11-2025	14:40:00	1,521.80	1,521.30	1,522.30	1,520.90	1,520.90	3,25,630	42,08,719	0	0
19-11-2025	14:35:00	1,521.24	1,521.80	1,521.90	1,520.90	1,521.20	1,02,018	38,83,089	0	0
19-11-2025	14:30:00	1,521.56	1,521.60	1,521.80	1,521.30	1,521.60	75,007	37,81,071	0	0
19-11-2025	14:25:00	1,521.39	1,521.40	1,521.70	1,521.10	1,521.50	35,817	37,06,064	0	0
19-11-2025	14:20:00	1,521.10	1,521.20	1,521.40	1,520.90	1,521.30	39,464	36,70,247	0	0
19-11-2025	14:15:00	1,520.33	1,520.20	1,521.30	1,519.50	1,521.00	73,794	36,30,783	0	0
19-11-2025	14:10:00	1,518.88	1,517.10	1,520.20	1,516.70	1,520.10	1,26,163	35,56,989	0	0
19-11-2025	14:05:00	1,518.35	1,519.10	1,519.50	1,517.00	1,517.20	99,875	34,30,826	0	0
19-11-2025	14:00:00	1,519.65	1,520.30	1,520.40	1,518.90	1,519.20	2,48,557	33,30,951	0	0
19-11-2025	13:55:00	1,520.03	1,519.10	1,520.90	1,519.10	1,520.00	98,439	30,82,394	0	0
19-11-2025	13:50:00	1,519.47	1,519.80	1,519.90	1,518.90	1,519.30	27,528	29,83,955	0	0
19-11-2025	13:45:00	1,519.18	1,518.60	1,519.80	1,518.40	1,519.60	1,12,803	29,56,427	0	0
19-11-2025	13:40:00	1,517.20	1,517.70	1,518.70	1,516.70	1,518.70	62,078	28,43,624	0	0
19-11-2025	13:35:00	1,517.61	1,517.60	1,517.90	1,516.90	1,517.60	72,812	27,81,546	0	0
19-11-2025	13:30:00	1,518.66	1,518.40	1,519.40	1,517.60	1,517.70	54,140	27,08,734	0	0
19-11-2025	13:25:00	1,518.67	1,519.10	1,519.20	1,518.10	1,518.30	46,037	26,54,594	0	0
19-11-2025	13:20:00	1,518.86	1,518.50	1,519.30	1,518.50	1,519.00	48,566	26,08,557	0	0
19-11-2025	13:15:00	1,519.52	1,519.90	1,520.50	1,518.10	1,518.60	40,445	25,59,991	0	0

4 Trading Menu

The **Trading Menu** serves as the primary gateway for all trading-related actions within the platform. It provides quick access to essential tools and functions required for seamless execution and monitoring of trades.



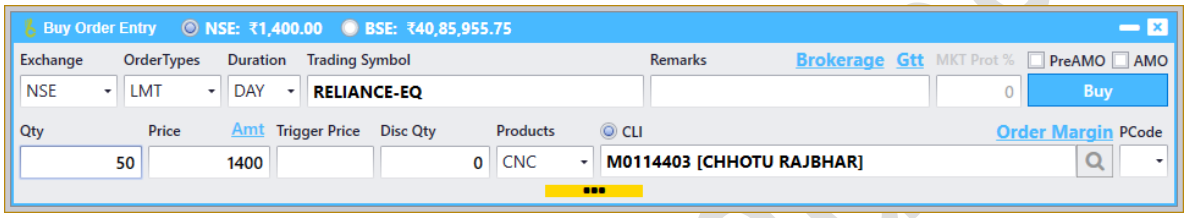
- **Place Orders**: Submit buy/sell orders for equities, derivatives, or commodities with full control over quantity, price, order type, and product type.
- **Modify Orders**: Edit pending/open orders before execution to adjust parameters like price or quantity.
- **Cancel Orders**: Withdraw unexecuted orders at any time before they are executed.
- **View Order Status**: Monitor real-time order status including pending, executed, rejected, or cancelled states directly from the exchange.
- **Unique Order ID**: Each order is assigned a **distinct order number**, allowing users to track and reference transactions with precision.

4.1 Normal Order

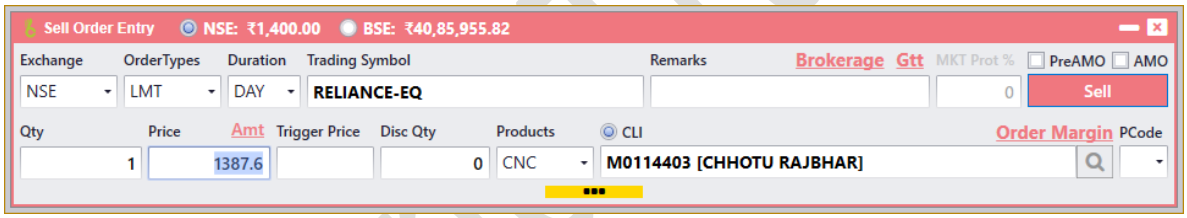
- **Normal Order (F1/F2) –** This is a standard Buy/Sell execution

The **Normal Order** screen, accessible via shortcut keys **F1 (Buy)** and **F2 (Sell)**, allows users to place standard trading orders across segments such as **Equity, Derivatives, Currency, and Commodities**.

Normal Buy Order



Normal Sell Order



- **After Market Order (CTRL F1/F2)-**

The **After Market Order (AMO)** feature, accessible via **CTRL + F1 (Buy)** and **CTRL + F2 (Sell)**, allows users to place orders **outside regular trading hours**. These orders are queued and sent to the exchange when the market opens.

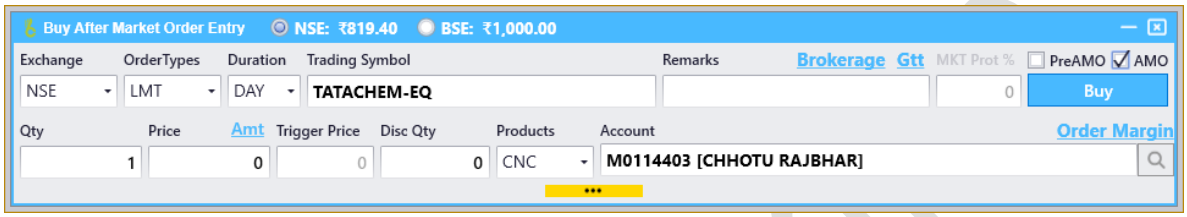
Pre-AMO (Pre After Market Orders) allow users to **prepare and queue orders** even before the official AMO window opens. These orders are stored locally or in the application and are automatically pushed to the exchange once the AMO session begins.

NSE & BSE (Equity, F&O, Currency)

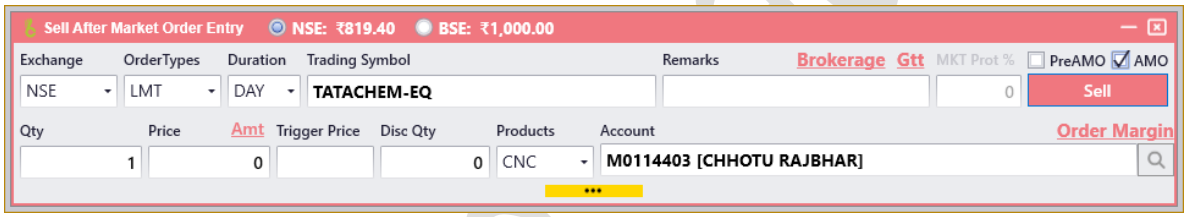
Session	Timings	Details
Pre-AMO	Anytime after 4:00 PM	Orders can be created and saved in the system but not yet sent to exchange.
AMO	4:30 PM – 8:57 AM	Orders are accepted and queued for submission to

Session	Timings	Details
		exchange at market open.
Market Opens	9:15 AM	Orders placed during AMO are sent to exchange at this time.

- **AMO Buy Order**



AMO Sell Order



OFS Order

OFS (Offer for Sale) is a mechanism that allows promoters or large shareholders to sell their shares in listed companies via the exchange platform. The OFS Order module enables users to **place bids** for such shares during the OFS window.

OFS Sell - Pending

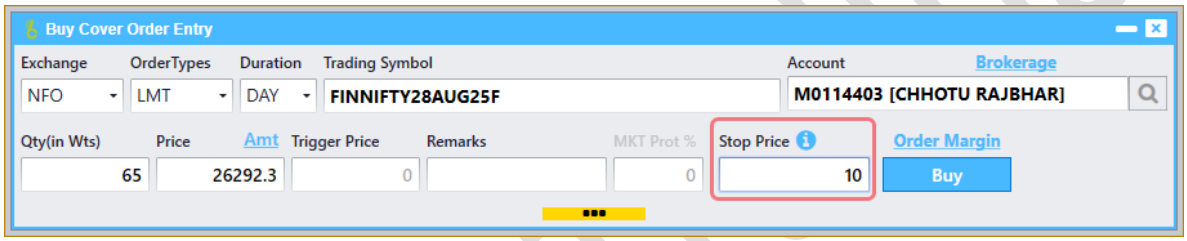
4.2 Special Order

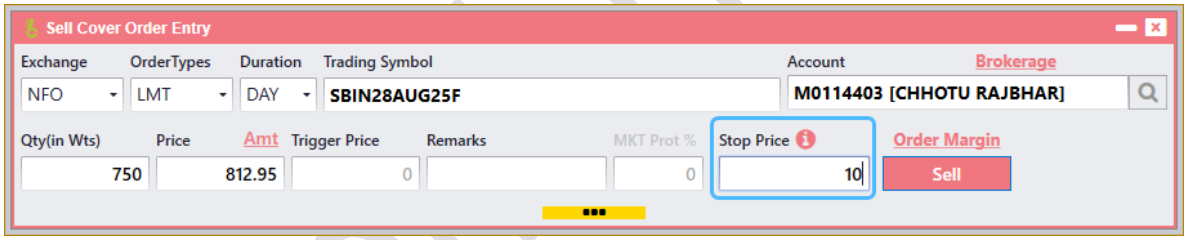
- **Cover Order (Shift + F1/F2) –**

  Intraday Order with Built-In Stop-Loss Protection

  A **Cover Order (CO)** is a special intraday order type that combines a **market or limit entry order** with a **mandatory stop-loss order**, offering traders a built-in risk management,

  Stop Price is to be given in terms of difference points and not the actual price.





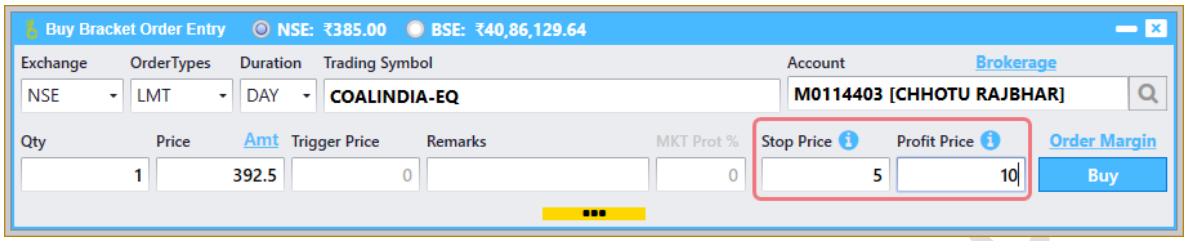
Key highlights

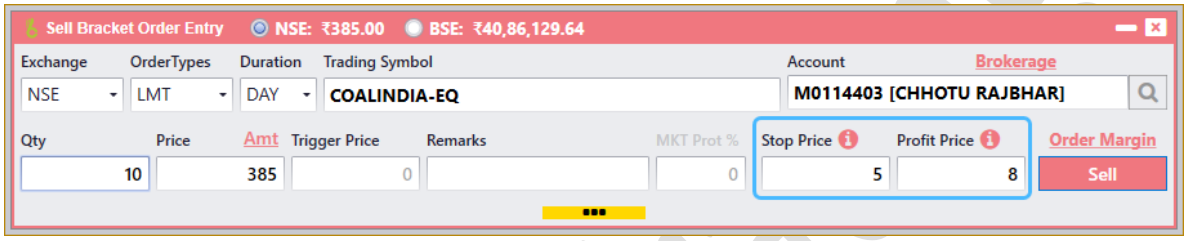
- Two-legged order: **Entry + Stop-Loss.**
- Entry can be **Market or Limit**, while Stop-Loss is always a Limit order.
- Once the entry leg is executed, the Stop-Loss leg is immediately placed.
- **Auto square-off** at end of day if not triggered.

- **Bracket Order (Shift + F3/F4)**

  A **Bracket Order (BO)** is an advanced intraday order type that allows users to **place an entry order along with a pre-defined Stop-Loss and Target (Profit Booking) order**. Once the entry order is executed, the system automatically places two opposite-side exit orders, ensuring **risk-managed trading**.

Profit Price & Stop Price is to be given in terms of difference points and not the actual price.





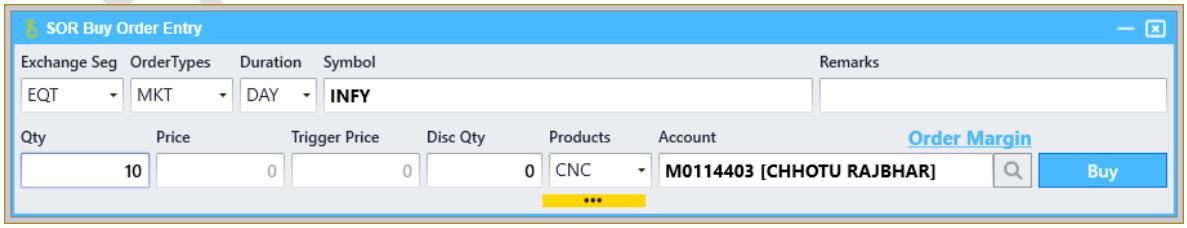
Key highlights

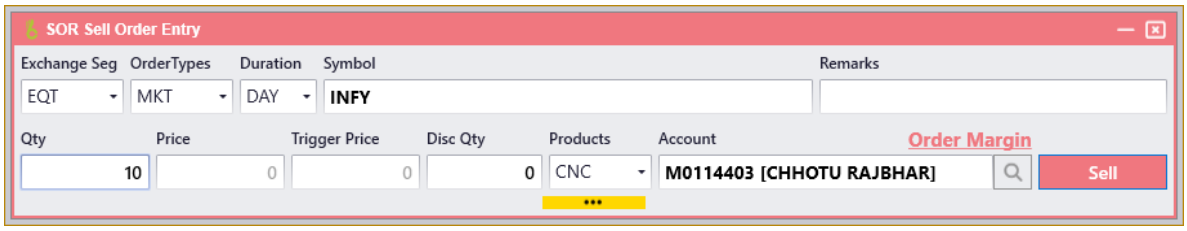
- Three-legged order**: Entry + Stop-Loss + Target.**
- **Auto-cancellation**: When either Stop-Loss or Target is hit, the other leg is automatically cancelled
- **Intraday only**: All legs are squared off by end of day if not triggered.

- **SOR Order**

SOR Order is an algorithmic order type that automatically routes your trade to the exchange offering the best price at the moment of execution. It's designed to:

- **Maximize price efficiency**
- **Minimize execution cost**
- **Improve fill probability**





Key highlights

When a client places an order:

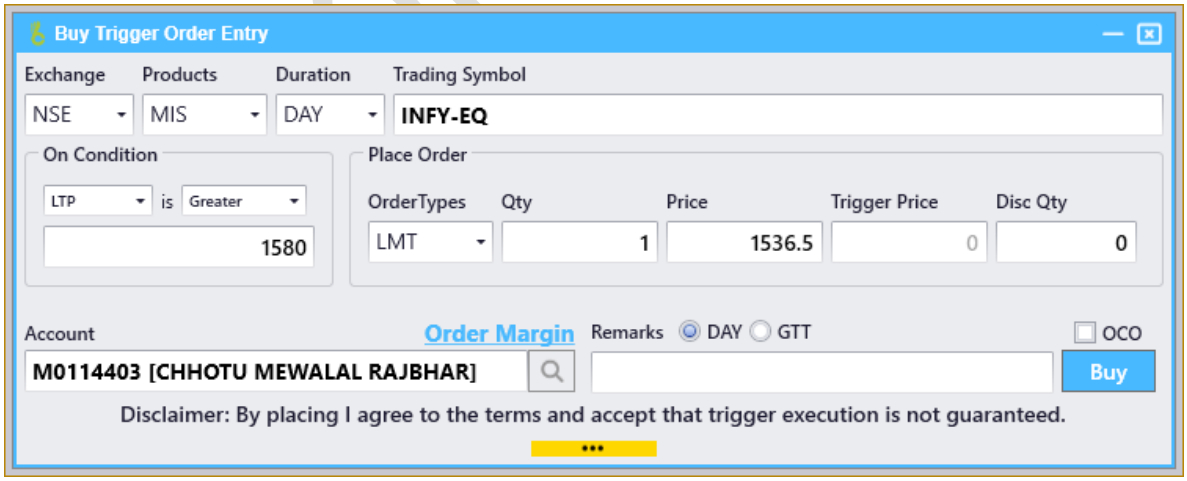
- The broker's system checks **real-time bid/ask prices** across exchanges (e.g., NSE, BSE).
- The order is routed to the exchange offering the **best execution price**.
- If liquidity is insufficient on one of the exchanges, the system may **split the order** across multiple exchanges.

- **Trigger Order**

  A **Trigger Order based on a given condition** is a type of conditional order that activates only when a specific market condition is met.

  Exactly, in a **Trigger Order**, once the specified condition is met (*e.g.* LTP > 1580), the system places an order based on the **selected Order Type**, which determines how the trade is executed.

  Order will be placed as per the mentined Order Types like Limit/Market/SL or SL-M etc



4.3 MultiLeg Order

A **Multileg Order** is a type of advanced order that allows a trader to place multiple legs (individual orders) simultaneously as part of a single strategy — typically used in **options** or **futures** trading. Here's a breakdown of **2-leg** and **3-leg** multileg orders.

This is purely manual multileg order placement system where the user selects each leg independently, without enforcing strategy constraints like same expiry or strike symmetry.

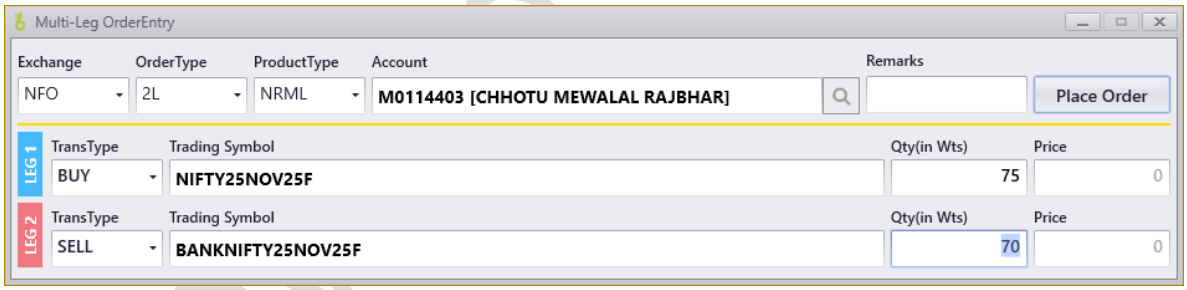
Key highlights

- Execution of one leg does **not depend** on the success or failure of others.
- Legs may execute partially, fully, or not at all — independently.
- Each leg is treated as a standalone order for margin and risk checks.

Note:

Brokers must ensure that net debit/credit of the spread is within acceptable limits.

RMS may reject orders if spread price deviates significantly from theoretical value or if margin benefit is misaligned.



4.4 Basket Order

- **Basket Order**

A **Basket Order** allows traders to place **multiple orders across different stocks or instruments simultaneously** as a single group or "basket." It's a powerful tool for executing **diversified strategies efficiently**.

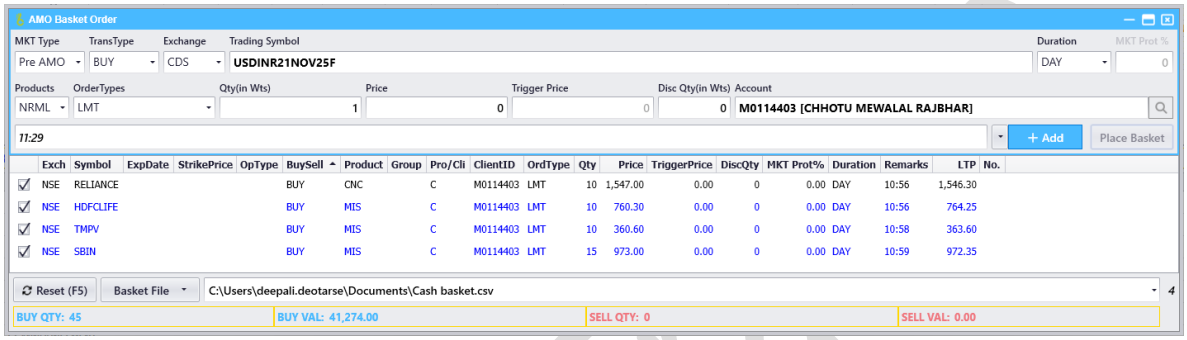
Key highlights

- Multiple Orders, One Click - Combine buy/sell orders for various scrips into one submission.
- Custom Quantities - Allocate fixed quantity per stock.
- Supports Order Types - Limit, Market, SL, SL-M, etc.
- Execution Control - Execute all orders together or selectively.
- Reusability - Save baskets for recurring strategies (e.g., sector rotation, index replication).

- **AMO Basket Order**

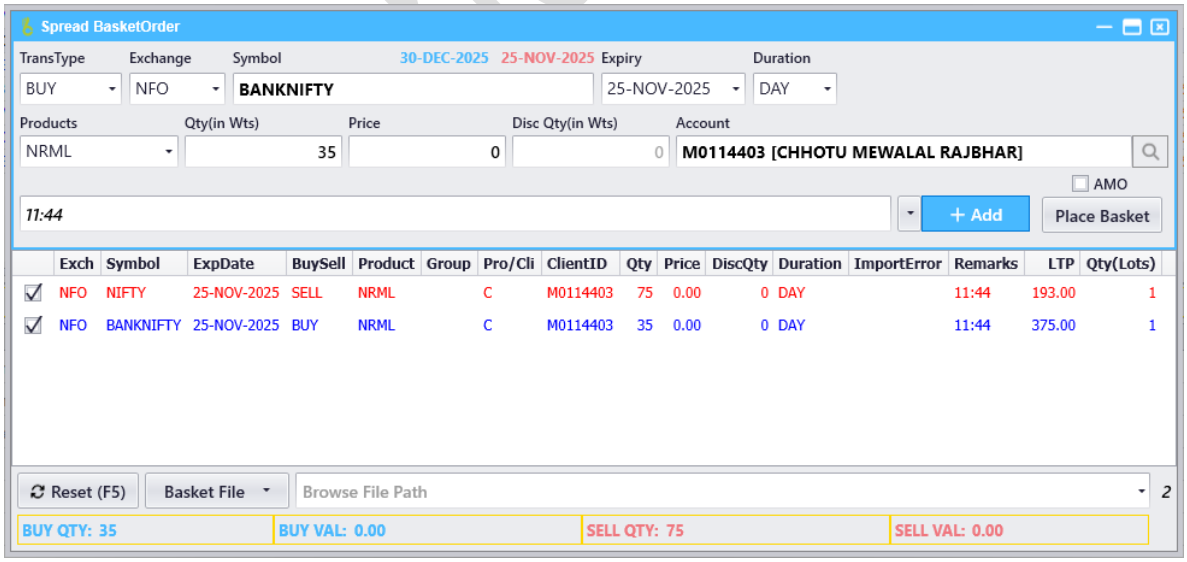
An **AMO (After Market Order) Basket Order** allows users to **pre-load and submit multiple orders** for different instruments **outside regular market hours**, grouped as a single basket.

Ideal for **pre-market planning** by maintaining sufficient margins at the time of order placement.



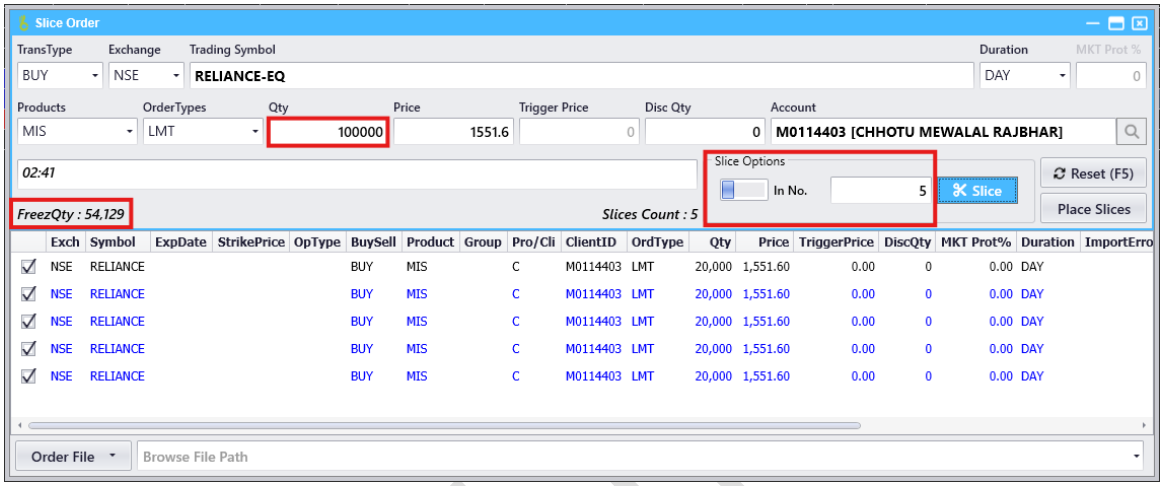
- **Spread Basket Order**

The **Spread Basket Order** feature enables traders to place **multiple legs of an options/futures strategy** together as a single basket. This ensures that the strategy is executed in one go, with control over the **net spread price**.



- **Slice Order**

A **Slice Order** is a trading feature that allows a large order to be broken down into **smaller, manageable parts (slices)** and executed gradually in the market. This helps reduce **market impact**, manage liquidity, and achieve better average pricing.



Key highlights

- A big buy/sell order is divided into smaller slices.
- Each slice can be sent based on market conditions.
- Prevents sudden price movement that a large single order might cause.

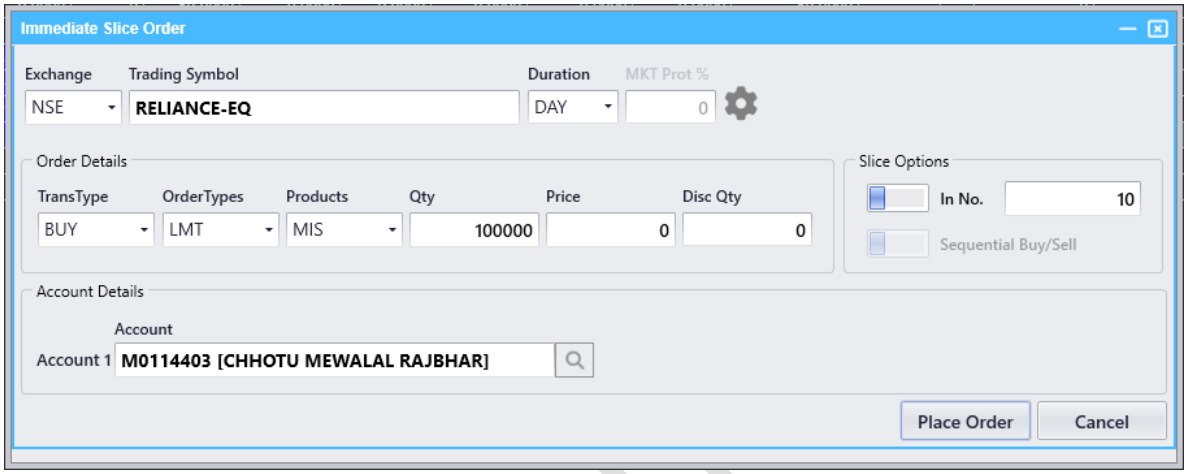
When the **order quantity exceeds the exchange-defined freeze quantity**, the system should automatically provide **slice order options**. These options must allow the user to define either:

- Number of slices (orders)
- Quantity per slice (order)

This ensures that the large order is broken down into smaller, compliant parts, thereby avoiding rejection or execution issues at the exchange level.

- **Immediate Slice Order**

An **Immediate Slice Order** is a variation of the slice order mechanism where a **large order exceeding the exchange-defined freeze quantity** is automatically broken into smaller slices and pushed to the exchange instantly**,** without waiting for user-defined intervals or manual triggers.



Automatic Splitting: If the entered **quantity > freeze quantity**, the system immediately slices it into smaller orders.

Execution Mode: All slices are sent to the exchange back-to-back, ensuring faster execution.

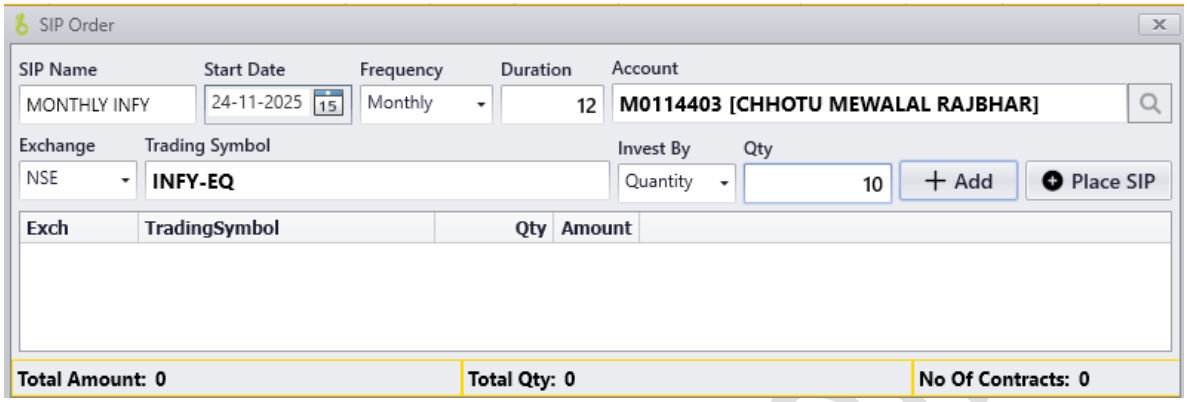
- **EquitySIP**

An **Equity SIP (Systematic Investment Plan)** is a feature that allows investors to **invest a fixed amount in selected stocks at regular intervals** (daily, weekly, or monthly), similar to a mutual fund SIP but directly in equities. User can create multiple SIPs with different frequencies as per choice.

Key Highlights

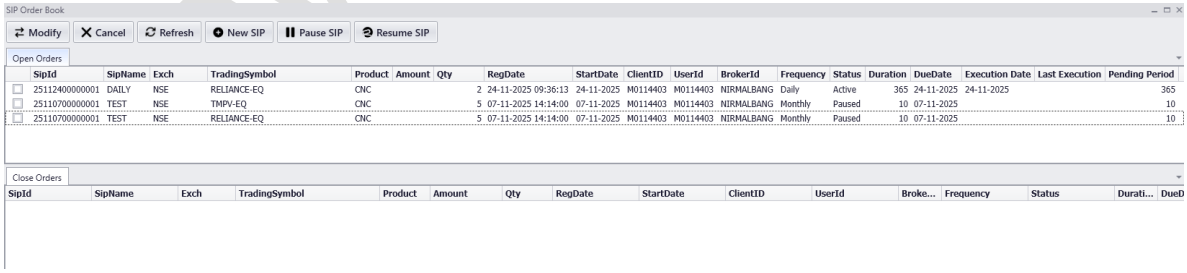
- **Systematic Investing**: Automates stock purchases at predefined intervals.
- **Flexibility**: Investors can choose specific stocks, investment amount, and frequency.
- **Cost Averaging**: Helps average out purchase price by buying across different market levels.
- **Discipline**: Encourages consistent investing habits without timing the market.
- **Customization**: Multiple SIPs can be set up across different stocks/sectors.

Create New SIP



SIP Name -User-defined name for the SIP (e.g. “Monthly Infy”)
Start Date -Date from which SIP should begin
Frequency - Interval of investment (Daily, Weekly, Monthly etc.)
Duration -Number of cycles or months
Account -Trading account code
Exchange -Exchange selection (e.g., NSE, BSE)
Trading Symbol -Scrip code or symbol (e.g., INFY, RELIANCE)
Invest By -Choose between Amount or Quantity based investment
Amount / Quantity -Enter either amount (₹) or quantity (shares) based on selection
Add Button -Adds the configured SIP leg to the order table
Place SIP -Final submission of all SIP legs in the basket

SIP Order Book



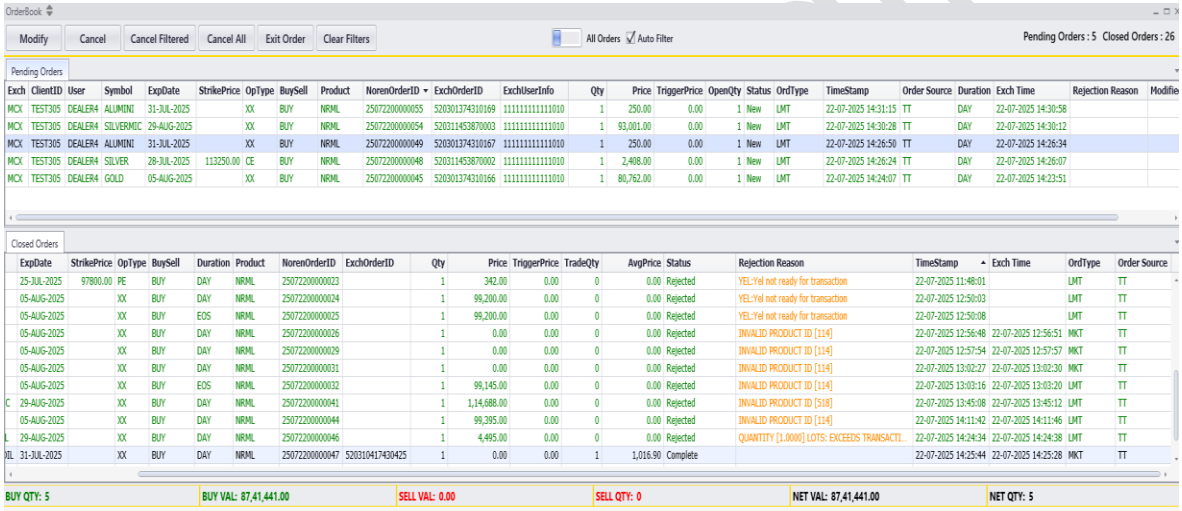
4.5 Order Book

The **Order Book** displays all active, executed, and cancelled orders placed by the user across various segments (Equity, F&O, Currency, commodities etc.). It serves as a real-time ledger of trading activity and order status; categorized into **Pending Orders** and **Closed Orders**.

It has **Actionable Interface** to Modify, Cancel, or Reorder directly from the order book.

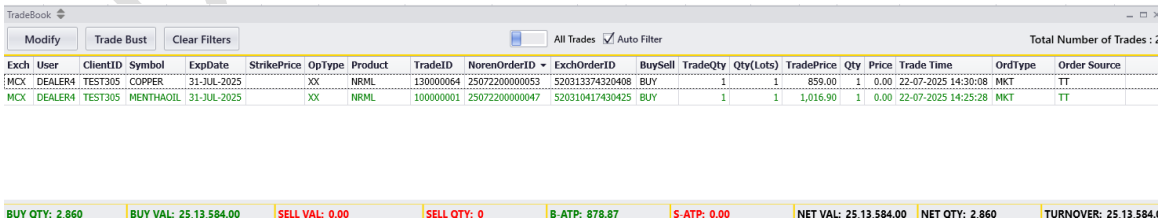
Showing order status for each orders like Pending, Executed, Partially Filled, Cancelled, Rejected.

Summary Panel displays aggregate metrics like **Net Quantity**, **Buy/Sell Quantity**, **Net Value**



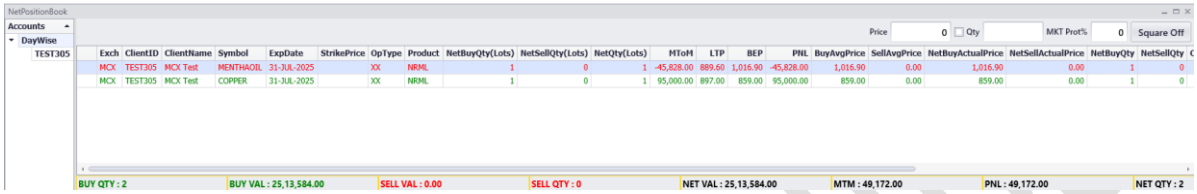
4.6 Trade Book

The **Trade Book** provides a detailed view of all executed trades across segments, capturing essential parameters for reconciliation, and performance analysis. It reflects the final outcome of orders that have resulted in actual trades.



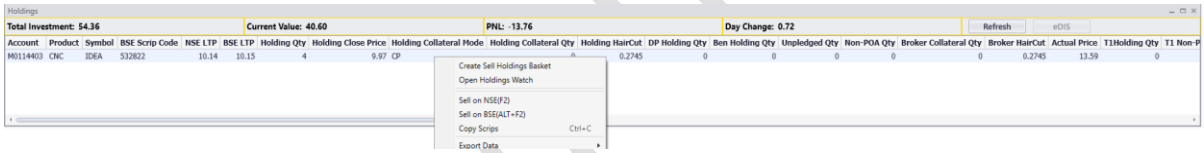
4.7 Position book

This module provides a **position-wise breakdown** of trading metrics across instruments, including classification, strike details, product type, and **realized P&L**. It helps traders assess performance at a granular level for each account and symbol.



4.8 Holdings

The **Holdings module** provides a snapshot of the user's current equity positions, showing real-time valuation, profit/loss, and performance metrics for each stock held in the account.



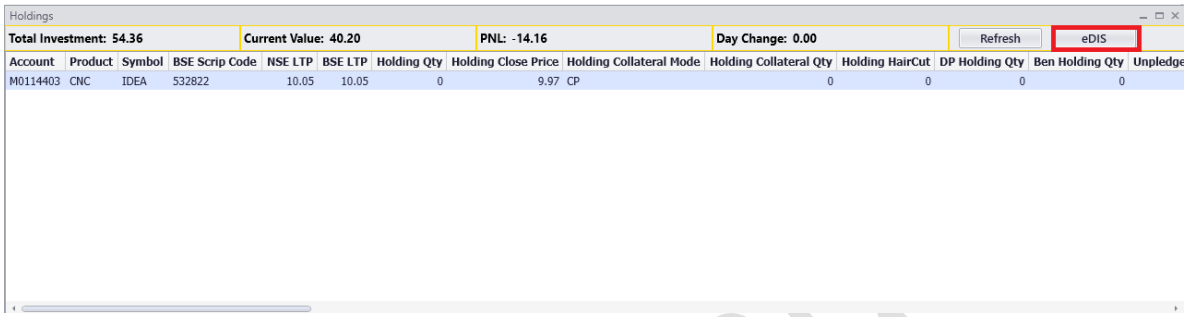
Context Menu Options

Create Sell holdings basket

- **Create Sell Holdings Basket** – Initiates a grouped sell order for selected holdings.
- **Open Holdings Watch** – Launches a watchlist view for selected holdings to monitor price movements and performance.
- **Sell on NSE (F2)** - Places a sell order for the selected scrip on the NSE. Shortcut: F2
- **Sell on BSE (ALT+F2) -** Places a sell order for the selected scrip on the BSE. Shortcut: ALT+F2
- **Copy Scrips (Ctrl+C)-** Copies selected scrip names to clipboard for quick reference
- **Export Data -** Exports holdings data to a file format (e.g., Excel) for offline analysis

eDIS

Electronic Delivery Instruction Slip (eDIS) is a digital mechanism introduced by depositories (NSDL/CDSL) that allows investors to authorize the transfer of securities from their demat account to the broker for settlement of trades **without submitting a physical DIS slip**.

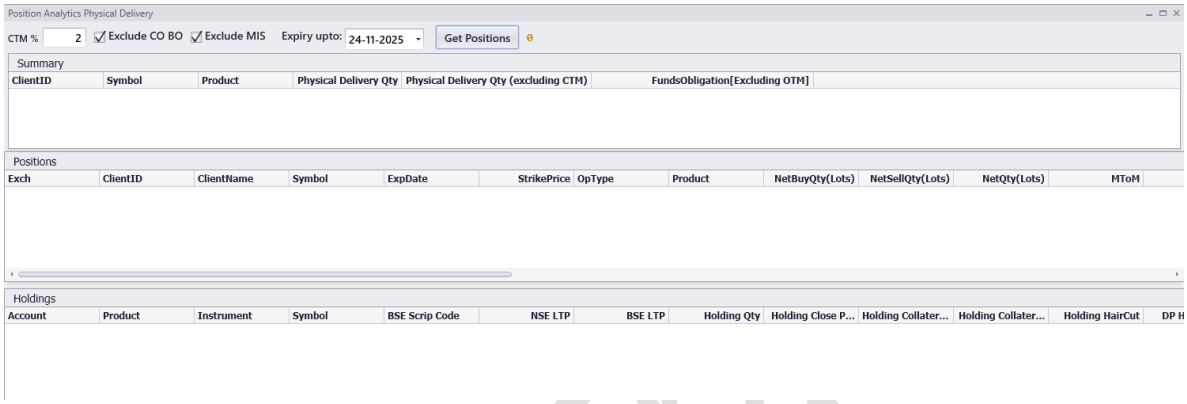


Steps (In general)

- Investor places a **delivery sell order** on the trading platform.
- Broker system checks if securities are available in the client's demat account.
- Platform redirects the client to the **depository (NSDL/CDSL) eDIS portal**.
- Order details (ISIN, quantity, broker ID) are passed securely to the depository.
- Client enters **DP ID + Client ID** (or is auto-fetched).
- Authentication via **TPIN** (Trading PIN) and **OTP** sent to registered mobile/email.
- Depository validates credentials.
- Client reviews the securities and quantity being authorized.
- Confirms authorization → depository generates a **transaction reference number**.
- Broker receives confirmation from depository that securities are authorized.
- Securities are marked as "approved for debit" in the demat account.
- On trade settlement day (T+1/T+2 depending on market rules), securities are debited from the client's demat account.
- Broker delivers them to the clearing corporation for settlement.

4.9 Position Analytics

This module provides a consolidated view of **client-wise physical delivery obligations**, helping operations and risk teams track net positions, delivery quantities, and fund requirements across instruments nearing expiry.



CTM% – Close to Money Percentage**,** CTM% is used to estimate the proportion of open option positions that are close to becoming in-the-money**,** and hence may result in delivery obligations if not squared off before expiry.

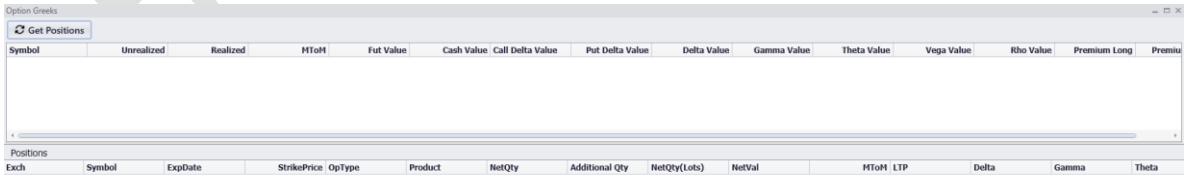
Exclude CO/BO/MIS: Filters out intraday and bracket orders to focus on delivery trades

Expiry Upto: Limits analysis to contracts expiring before the selected date

Get Positions: Triggers position fetch based on selected filters

4.10 Option Greeks

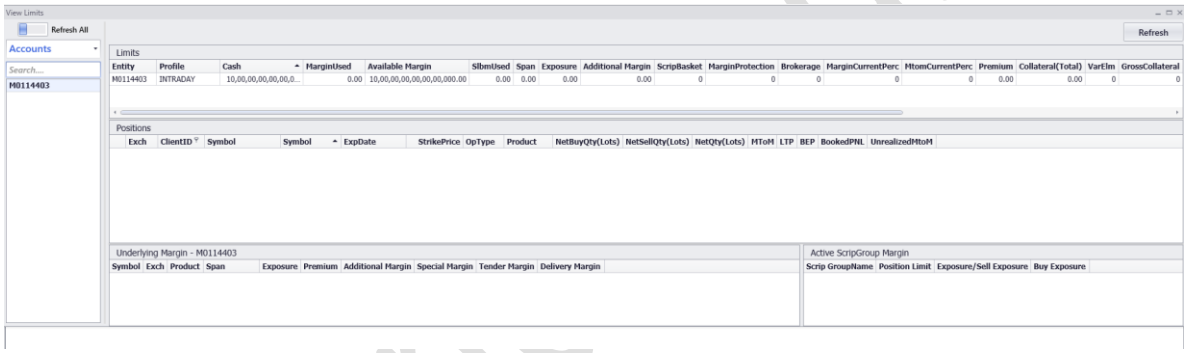
The **Option Greeks Form** provides a detailed analytical view of option positions using key sensitivity metrics—known as the "Greeks"—which help traders assess how option prices respond to changes in market variables.



Delta - Measures sensitivity of option price to changes in the underlying asset's price.
Gamma - Indicates how much Delta will change with a 1 rupee move in the underlying.
Theta - Represents time decay—how much the option loses value as expiry approaches.
Vega - Sensitivity of option price to changes in implied volatility.
Rho - Measures impact of interest rate changes on option value.
Premium / MTM - Shows premium paid/received and mark-to-market valuation.

4.11 View Limits

The **View Limits** module provides a consolidated dashboard for monitoring **account-level margins, exposures, and trading limits** across segments. It is essential for RMS teams, dealers, and compliance officers to ensure trades remain within permissible risk thresholds.

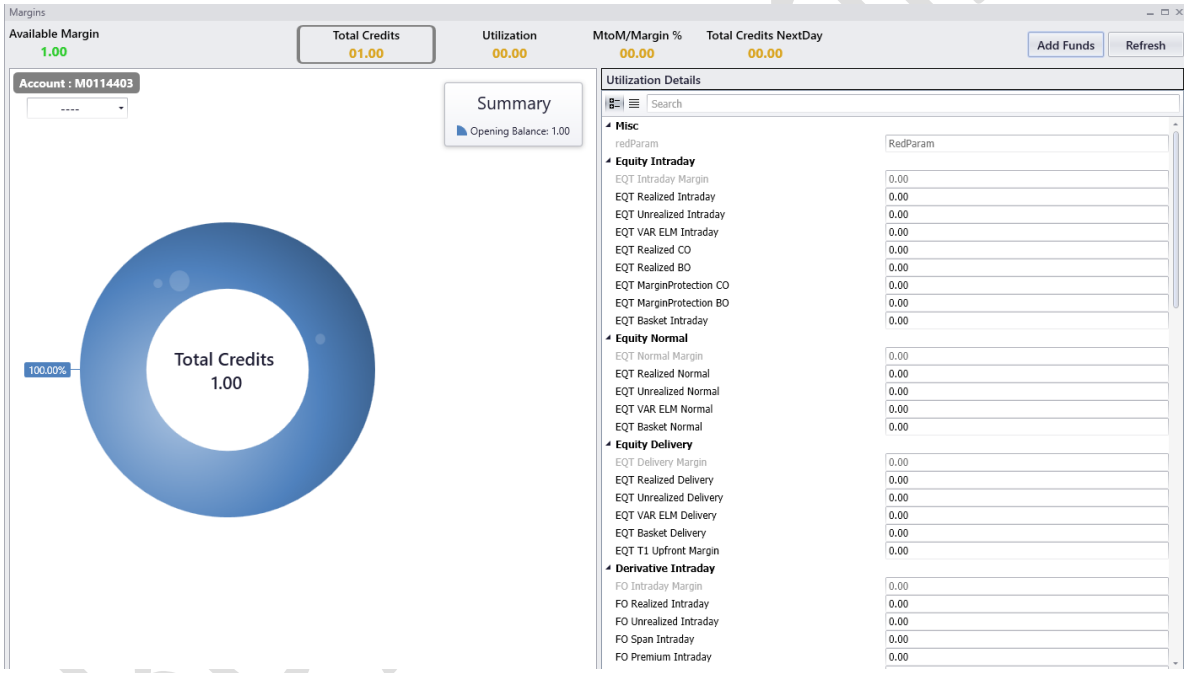


Cash / Available Margin - Funds available for trading after margin blocks
Exposure / Additional Margin - Risk-based margin blocks due to open positions
Settlement Space / Premium - Settlement obligations and premium paid for options
Margin Restriction / Conversion Factor - Controls on margin usability and conversion logic
Gross Calculated Value - Total exposure value across all positions.

4.12 Margins

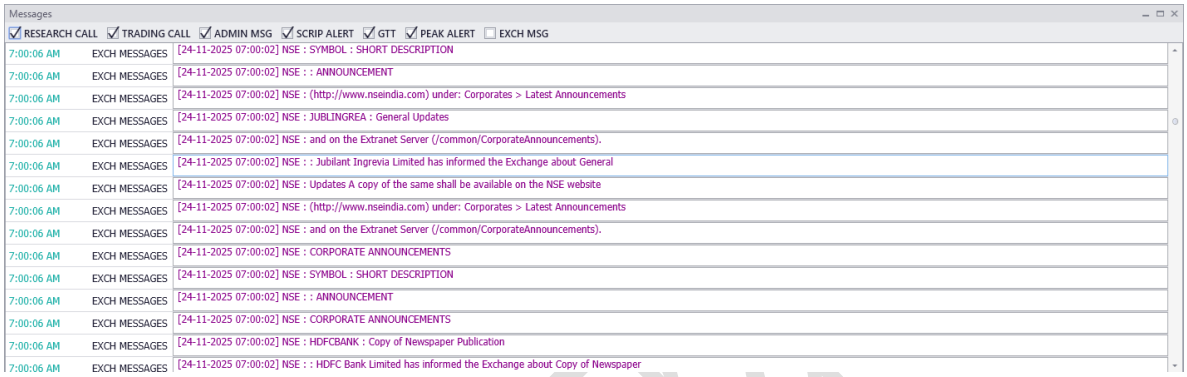
The **Margins (Dashboard)** provides a real-time snapshot of a trading account's margin availability, utilization, and credit breakdown. It is essential for traders and RMS teams to monitor fund sufficiency, margin consumption, and risk exposure across trading segments.

Available Margin - Funds currently available for trading
Total Credits - Combined credits including cash, collateral, and realized gains
Utilization - Margin consumed by open positions
MTM/Margin % - Momentum margin or percentage utilization indicator
Total Credits NextDay - Expected credit rollover for the next trading day



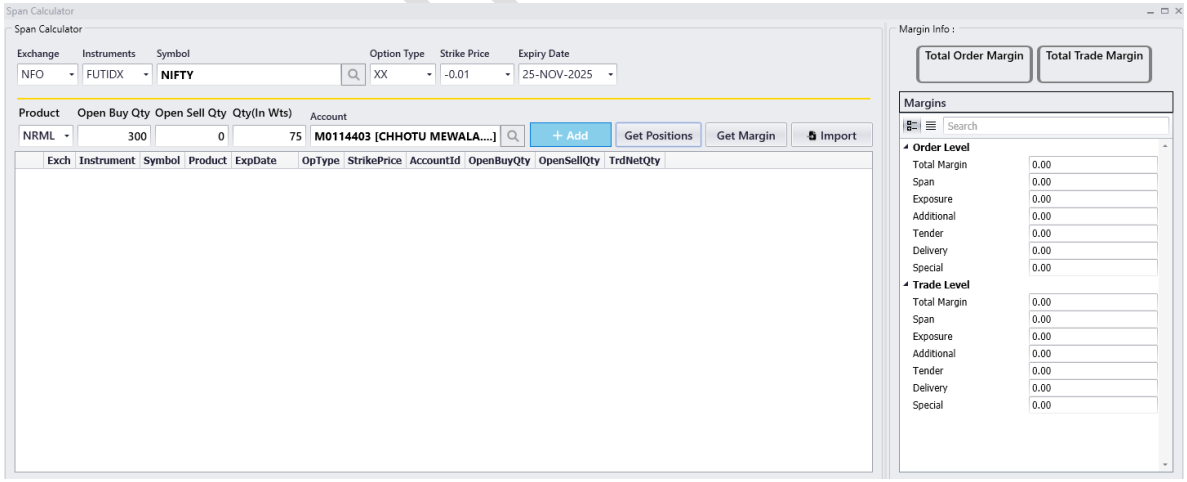
4.13 Messages

The **Messages module** provides categorized alerts and communications relevant to trading, research, and system operations. The filter panel allows users to selectively view messages based on their type, ensuring focused attention and efficient response.



4.14 Span Calculator

The **Span Calculator** module is designed to compute margin requirements for futures and options positions across exchanges. It helps traders and RMS teams assess margin sufficiency before placing or modifying trades, ensuring compliance with exchange-prescribed risk parameters.



Input Controls are -

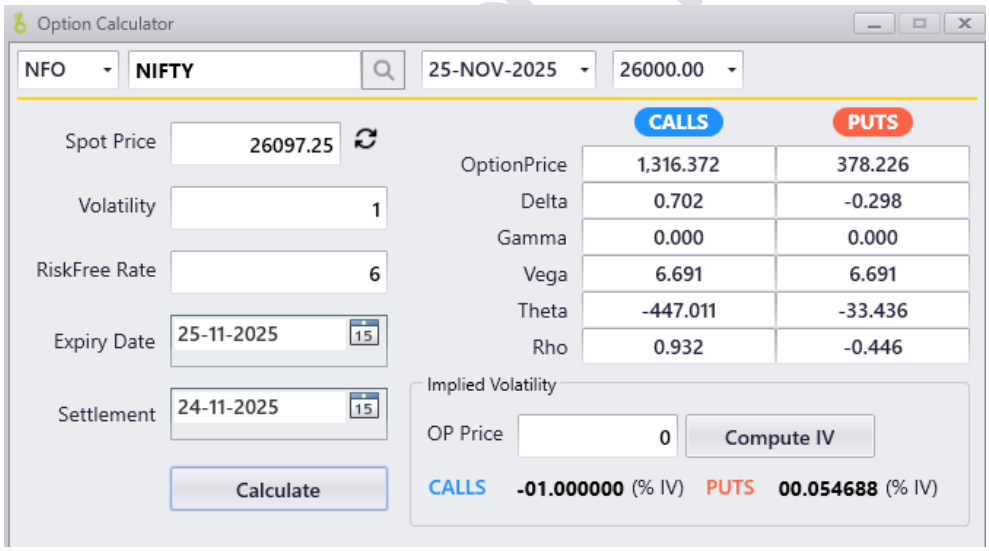
- **Exchange / Instrument / Symbol / Expiry / Option Type / Strike Price** - Used to define the contract for which margin is to be calculated
- **Account & Product Mapping** - Links margin computation to specific client and product codes
- **Open Buy/Sell Qty** - Position quantities used to derive net exposure

+ Add / Get Positions / Get Margin / Import - Used to populate positions and trigger margin computation

Total Order Margin / Total Trade Margin - Summarizes margin impact of pending orders vs executed trades

4.15 Option Calculator

The **Option Calculator** module is a dynamic tool used to compute theoretical option prices and sensitivity metrics (Greeks) based on user-defined market inputs. It helps traders, analysts, and risk managers evaluate the behavior of CALL and PUT options under varying market conditions.



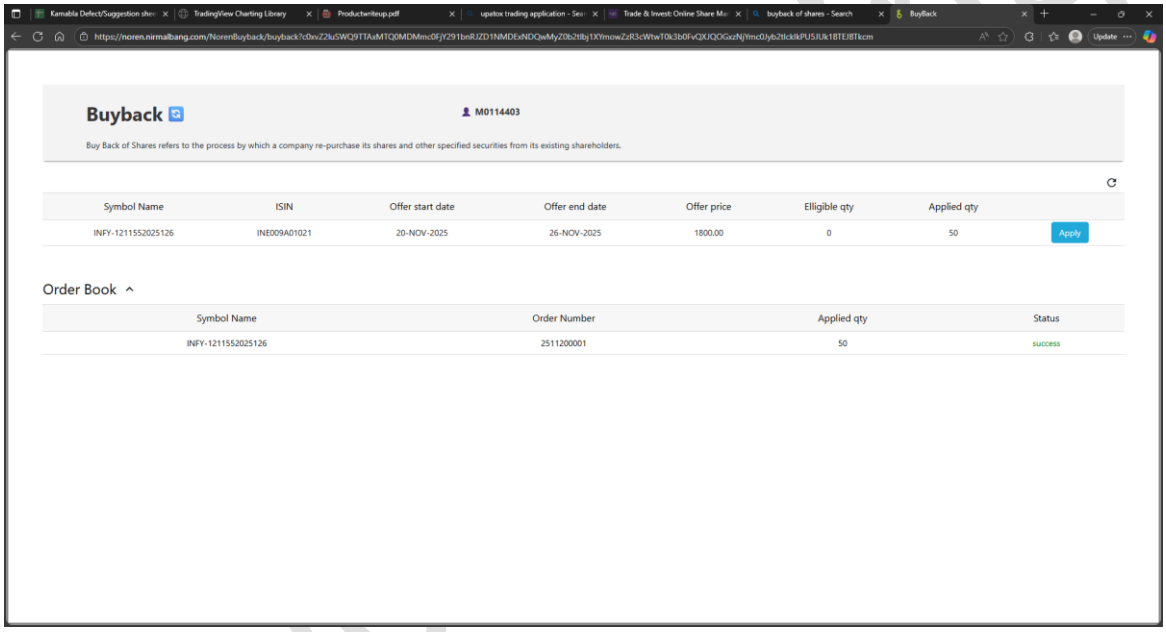
5 Weblink Menu

5.1 Buyback

The **Buyback Form** enables eligible shareholders to participate in a company's share repurchase program by submitting their application directly through the trading platform.

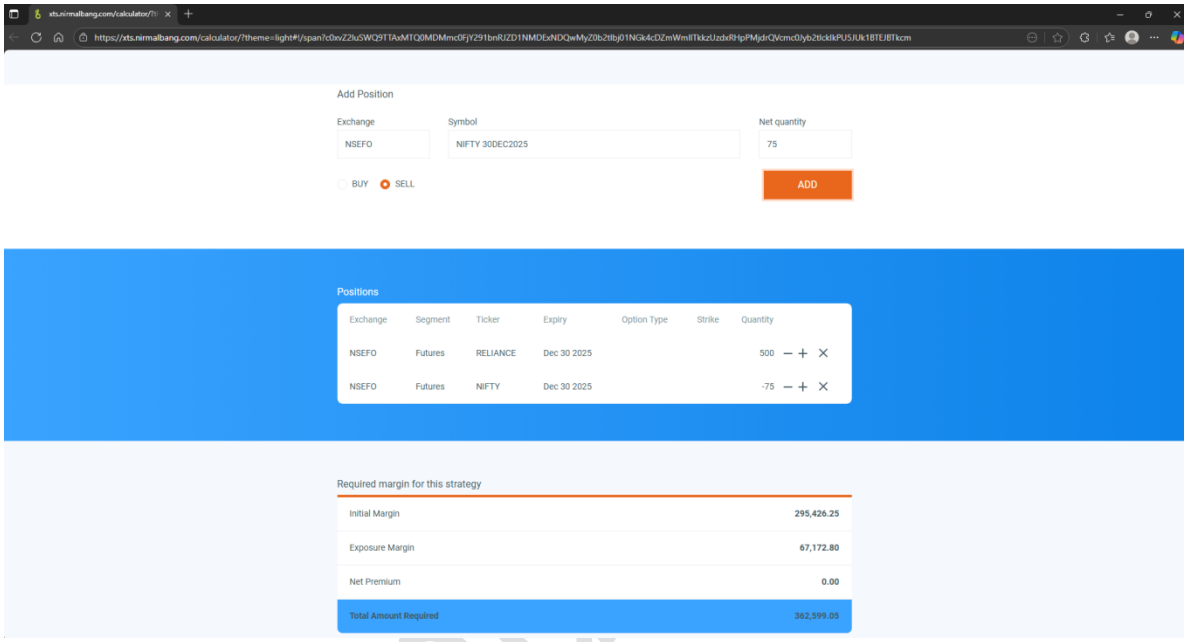
Click on 'Apply' and follow the instructions to participate in buyback.

Note – Use refresh button in case if no records are shown.



5.2 Margin Calculator

The **Margin Calculator** module provides traders with real-time margin requirement estimates for various order types and instruments. It helps users assess upfront and exposure margins before placing trades, ensuring compliance with exchange norms and risk thresholds.

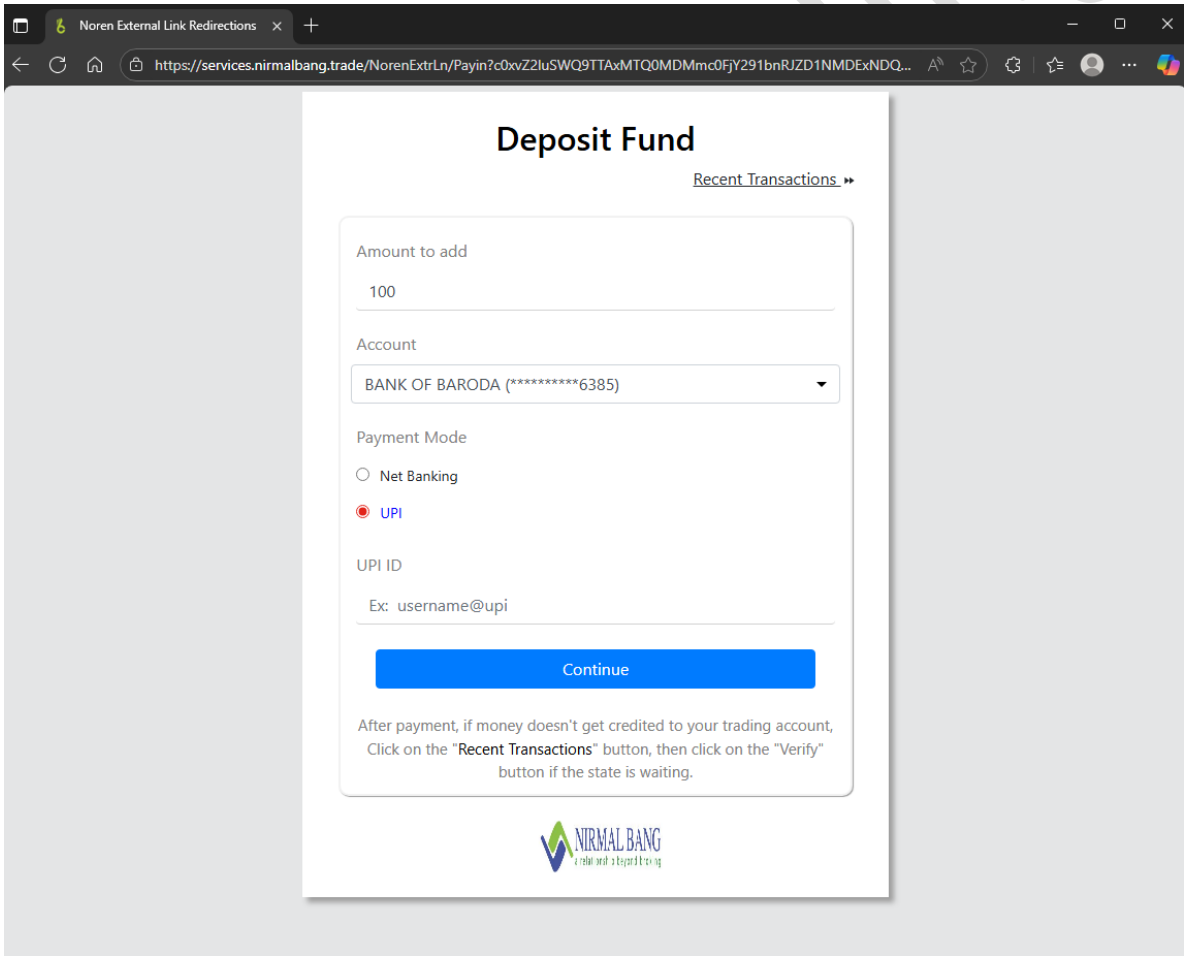


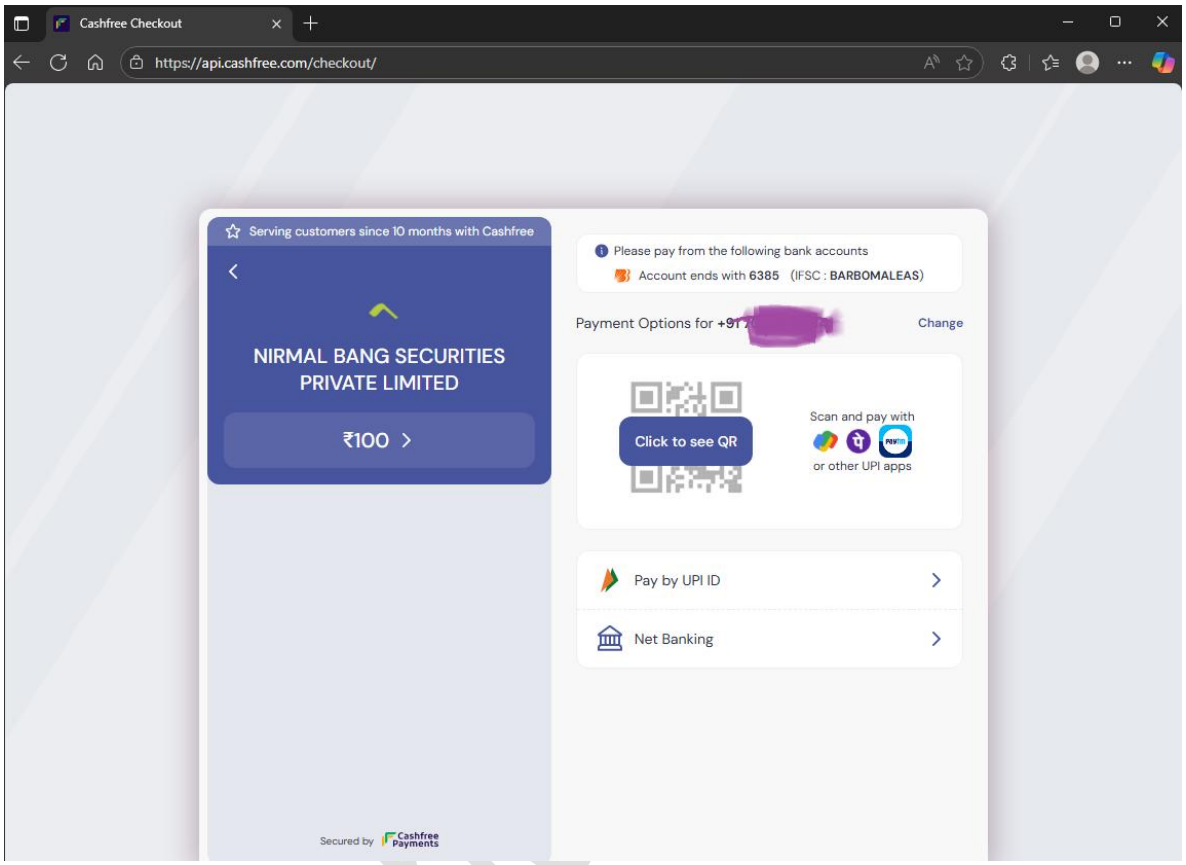
5.3 Payin

The **Payin** module enables users to deposit funds into their trading account securely and seamlessly through integrated banking channels.

Steps

- Enter the amount
- Select Account (In case of multiple otherwise default account will be auto selected)
- Select Payment Mode (Net Banking/UPI) – Enter required details accordingly
- Click 'Continue' and follow the steps.

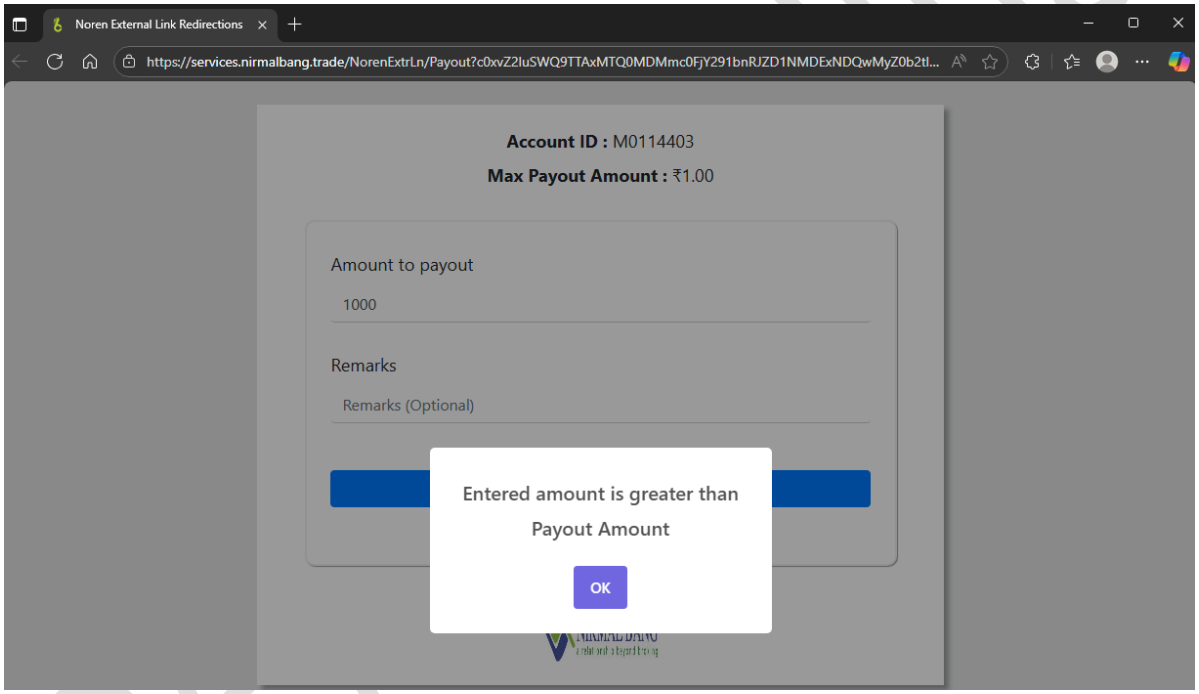



Cashfree Checkout
https://api.cashfree.com/checkout/
Serving customers since 10 months with Cashfree
NIRMAL BANG SECURITIES PRIVATE LIMITED
₹100 >
Secured by Cashfree Payments
Please pay from the following bank accounts
Account ends with 6385 (IFSC : BARBOMALEAS)
Payment Options for +91
Change
Click to see QR
Scan and pay with
or other UPI apps
Pay by UPI ID
Net Banking

5.4 Payout

The **Payout** module allows users to initiate fund withdrawals from their trading account to their registered bank account. It ensures secure processing while adhering to broker and exchange settlement norms.

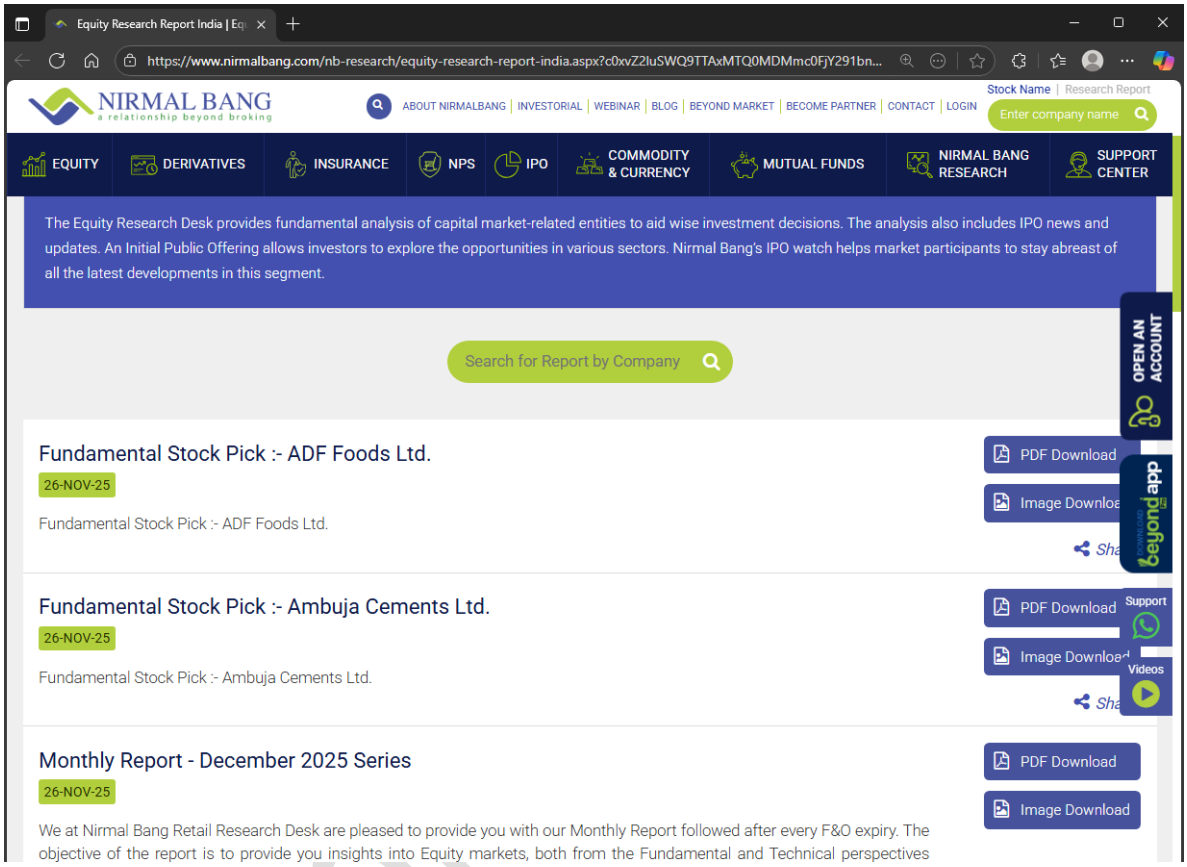
The **Payout Form** allows clients to initiate fund withdrawal requests from their trading account to their registered bank account. It captures essential details such as the **Account ID**, **Maximum Payout Amount available**, and the **Requested Payout Amount**. The system validates the entered amount against available limits and displays appropriate error messages if the request exceeds the permissible threshold.



Validation logics are implemented that**,** entered amount must be ≤ Max Payout Amount

Error message shown for over-limit requests: *"Entered amount is greater than Payout Amount"*

5.5 Research


Equity Research Report India | Eq
https://www.nirmalbang.com/nb-research/equity-research-report-india.aspx?c0xvZ2luSWQ9TTAxMTQ0MDMmc0FjY291bn...
NIRMAL BANG
a relationship beyond broking
ABOUT NIRMALBANG | INVESTORIAL | WEBINAR | BLOG | BEYOND MARKET | BECOME PARTNER | CONTACT | LOGIN
Stock Name | Research Report
Enter company name
EQUITY
DERIVATIVES
INSURANCE
NPS
IPO
COMMODITY & CURRENCY
MUTUAL FUNDS
NIRMAL BANG RESEARCH
SUPPORT CENTER
The Equity Research Desk provides fundamental analysis of capital market-related entities to aid wise investment decisions. The analysis also includes IPO news and updates. An Initial Public Offering allows investors to explore the opportunities in various sectors. Nirmal Bang's IPO watch helps market participants to stay abreast of all the latest developments in this segment.
Search for Report by Company
OPEN AN ACCOUNT
Fundamental Stock Pick :- ADF Foods Ltd.
26-NOV-25
Fundamental Stock Pick :- ADF Foods Ltd.
PDF Download
Image Download
Fundamental Stock Pick :- Ambuja Cements Ltd.
26-NOV-25
Fundamental Stock Pick :- Ambuja Cements Ltd.
PDF Download
Image Download
Support
Videos
Monthly Report - December 2025 Series
26-NOV-25
We at Nirmal Bang Retail Research Desk are pleased to provide you with our Monthly Report followed after every F&O expiry. The objective of the report is to provide you insights into Equity markets, both from the Fundamental and Technical perspectives
PDF Download
Image Download

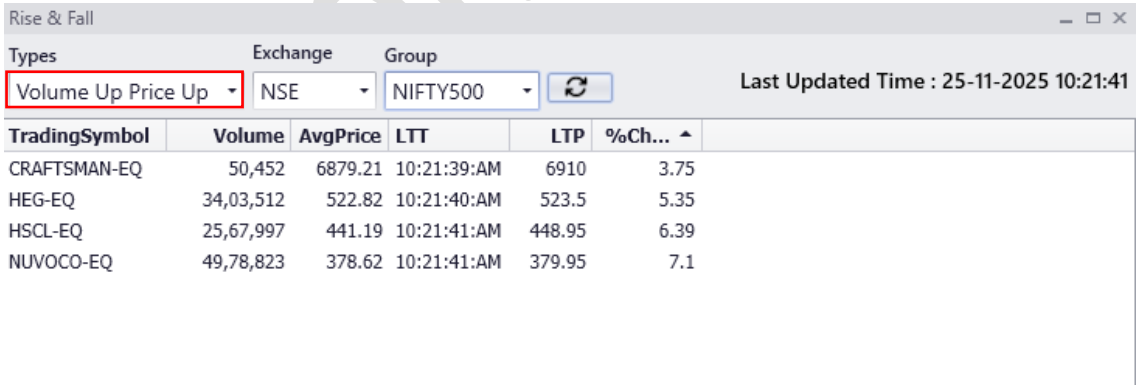
6 Scanners Menu

A **Scanner module** in a trading application is a **real-time monitoring tool** that continuously filters market data, portfolios, or system events against predefined rules. It helps users and operations teams quickly identify opportunities, risks, or anomalies without manually tracking every instrument.

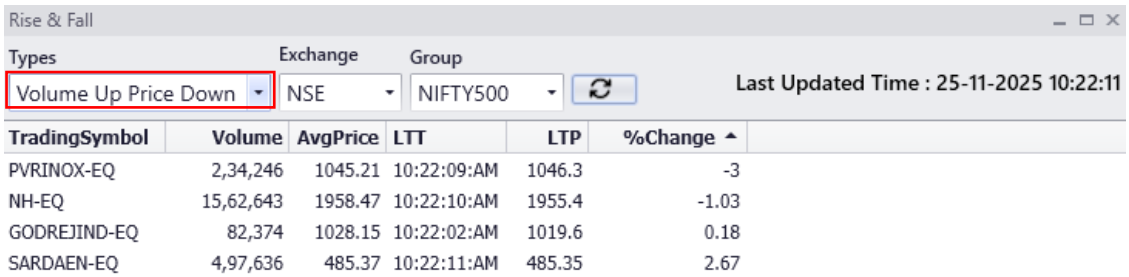
6.1 Rise & Fall

The **Rise & Fall Scanner** is a dynamic market monitoring tool that identifies stocks exhibiting significant price and volume movements within a defined timeframe. It helps users' quickly spot momentum-driven opportunities or anomalies by categorizing scrips based on real-time performance metrics.

In short, **Rise & Fall** Scanner is your real-time radar for tracking momentum shifts across the market (for selected group).



TradingSymbol	Volume	AvgPrice	LTT	LTP	%Ch...
CRAFTSMAN-EQ	50,452	6879.21	10:21:39:AM	6910	3.75
HEG-EQ	34,03,512	522.82	10:21:40:AM	523.5	5.35
HSCL-EQ	25,67,997	441.19	10:21:41:AM	448.95	6.39
NUVOCO-EQ	49,78,823	378.62	10:21:41:AM	379.95	7.1



TradingSymbol	Volume	AvgPrice	LTT	LTP	%Change
PVRINOX-EQ	2,34,246	1045.21	10:22:09:AM	1046.3	-3
NH-EQ	15,62,643	1958.47	10:22:10:AM	1955.4	-1.03
GODREJIND-EQ	82,374	1028.15	10:22:02:AM	1019.6	0.18
SARDAEN-EQ	4,97,636	485.37	10:22:11:AM	485.35	2.67

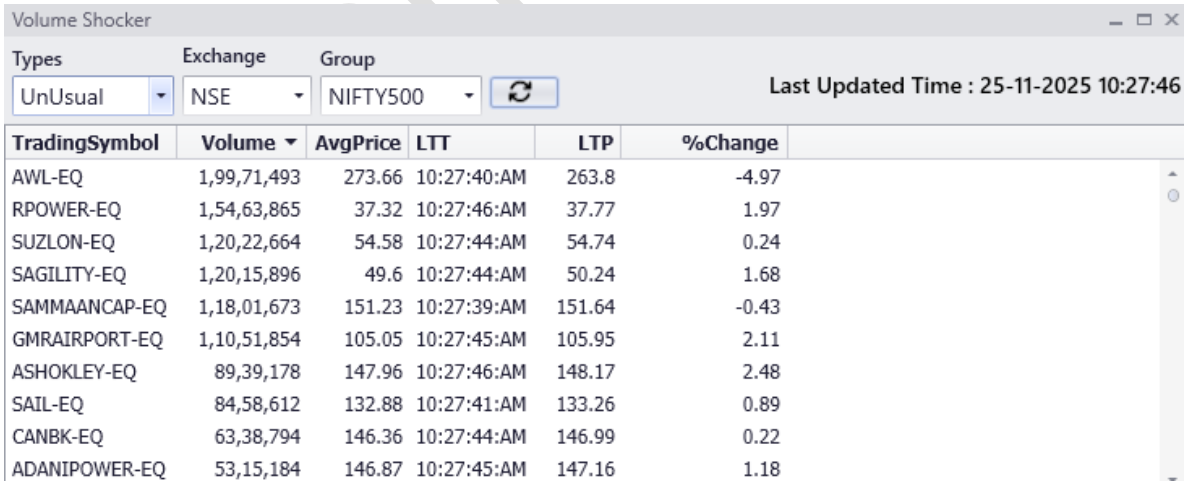
It has **d**ual filters: Classifies stocks into categories like:

- Volume Up & Price Up – *bullish momentum*
- Volume Up & Price Down – *potential distribution or reversal*

6.2 Volume shocker

The **Volume Shocker** scanner identifies stocks experiencing **unusual surges in trading volume** compared to their historical averages. It helps users detect early signs of market activity that may precede price movement, news flow, or institutional interest.

In short, **Volume Shocker** is your early-warning radar for unusual trading activity across the market.



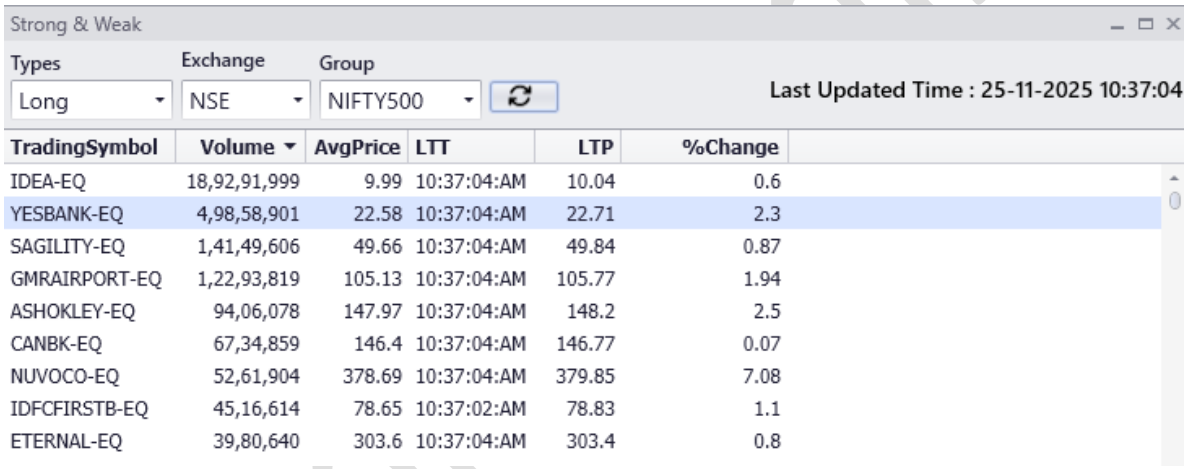
TradingSymbol	Volume	AvgPrice	LTT	LTP	%Change
AWL-EQ	1,99,71,493	273.66	10:27:40:AM	263.8	-4.97
RPOWER-EQ	1,54,63,865	37.32	10:27:46:AM	37.77	1.97
SUZLON-EQ	1,20,22,664	54.58	10:27:44:AM	54.74	0.24
SAGILITY-EQ	1,20,15,896	49.6	10:27:44:AM	50.24	1.68
SAMMAANCAP-EQ	1,18,01,673	151.23	10:27:39:AM	151.64	-0.43
GMRAIRPORT-EQ	1,10,51,854	105.05	10:27:45:AM	105.95	2.11
ASHOKLEY-EQ	89,39,178	147.96	10:27:46:AM	148.17	2.48
SAIL-EQ	84,58,612	132.88	10:27:41:AM	133.26	0.89
CANBK-EQ	63,38,794	146.36	10:27:44:AM	146.99	0.22
ADANIPOWER-EQ	53,15,184	146.87	10:27:45:AM	147.16	1.18

It has below filters

- **Unusual:** Highlights stocks with significantly higher volume than their average, often linked to active market events.
- **Potential:** Flags stocks with emerging volume trends that may develop into full-blown spikes.

6.3 Strong /Weak

The **Strong / Weak Scanner** identifies stocks showing **relative strength or weakness** based on real-time price and volume behavior. It helps users track outperformers and underperformers within selected market.



TradingSymbol	Volume	AvgPrice	LTT	LTP	%Change
IDEA-EQ	18,92,91,999	9.99	10:37:04:AM	10.04	0.6
YESBANK-EQ	4,98,58,901	22.58	10:37:04:AM	22.71	2.3
SAGILITY-EQ	1,41,49,606	49.66	10:37:04:AM	49.84	0.87
GMRAIRPORT-EQ	1,22,93,819	105.13	10:37:04:AM	105.77	1.94
ASHOKLEY-EQ	94,06,078	147.97	10:37:04:AM	148.2	2.5
CANBK-EQ	67,34,859	146.4	10:37:04:AM	146.77	0.07
NUVOCO-EQ	52,61,904	378.69	10:37:04:AM	379.85	7.08
IDFCFIRSTB-EQ	45,16,614	78.65	10:37:02:AM	78.83	1.1
ETERNAL-EQ	39,80,640	303.6	10:37:04:AM	303.4	0.8

It has below filters

- **Long (Strong):** Stocks showing upward momentum.
- **Short (Weak):** Stocks underperforming or showing bearish signals.
-

6.4 Circuit Breaker

The **Circuit Breaker Scanner** tracks stocks that have hit their **upper or lower circuit limits**, as defined by exchange volatility control mechanisms. It helps users monitor extreme price movements and identify scrips temporarily halted from further trading.

In short, **Circuit Breaker Scanner** is your real-time alert system for stocks hitting regulatory price boundaries.

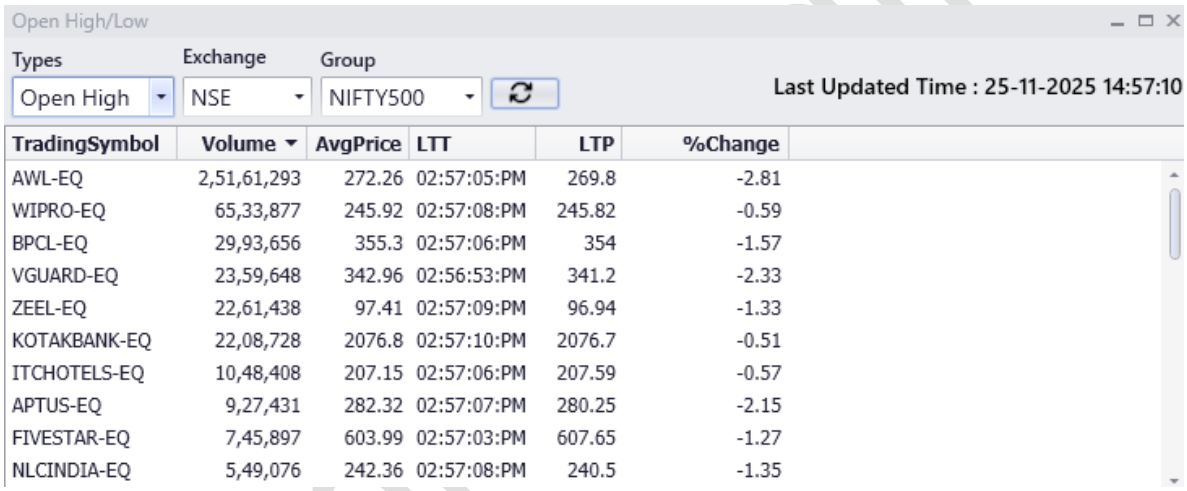
It has below filters

- **Upper Circuit:** Stocks that have reached the maximum allowed upward price movement.
- **Lower Circuit:** Stocks that have hit the maximum allowed downward price movement.

6.5 Open High/Low

The **Open High/Low Scanner** identifies stocks where the **opening price matches either the day's high or low**, signaling potential strength or weakness right from market open. It helps users spot early momentum plays or reversal setups based on price behavior in the initial ticks.

In short, **Open High/Low Scanner** flags stocks showing directional intent from the opening bell.



TradingSymbol	Volume	AvgPrice	LTT	LTP	%Change
AWL-EQ	2,51,61,293	272.26	02:57:05:PM	269.8	-2.81
WIPRO-EQ	65,33,877	245.92	02:57:08:PM	245.82	-0.59
BPCL-EQ	29,93,656	355.3	02:57:06:PM	354	-1.57
VGUARD-EQ	23,59,648	342.96	02:56:53:PM	341.2	-2.33
ZEEL-EQ	22,61,438	97.41	02:57:09:PM	96.94	-1.33
KOTAKBANK-EQ	22,08,728	2076.8	02:57:10:PM	2076.7	-0.51
ITCHOTELS-EQ	10,48,408	207.15	02:57:06:PM	207.59	-0.57
APTUS-EQ	9,27,431	282.32	02:57:07:PM	280.25	-2.15
FIVESTAR-EQ	7,45,897	603.99	02:57:03:PM	607.65	-1.27
NLCINDIA-EQ	5,49,076	242.36	02:57:08:PM	240.5	-1.35

It has below filters

- **Open = High:** Indicates selling pressure from the start; potential bearish sentiment.
- **Open = Low:** Indicates buying interest from the start; potential bullish sentiment.

6.6 High/Low Breakers

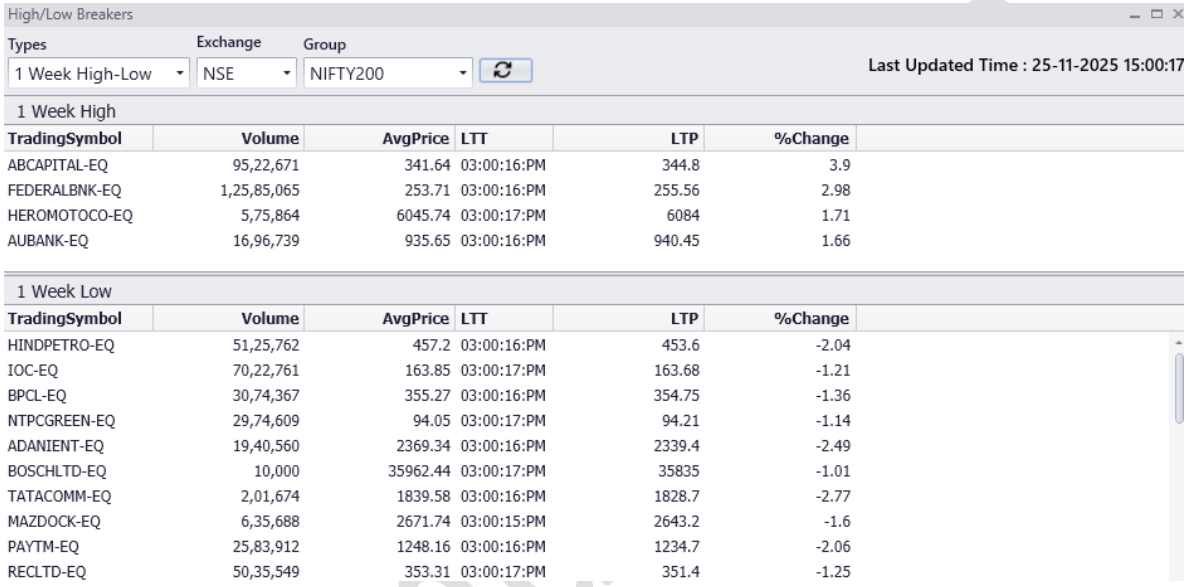
The **High Low Breaker Scanner** identifies stocks that have breached their **recent or historical high/low price levels** across multiple timeframes. It helps users track breakout and breakdown candidates, enabling momentum trading, trend analysis, and risk alerts.

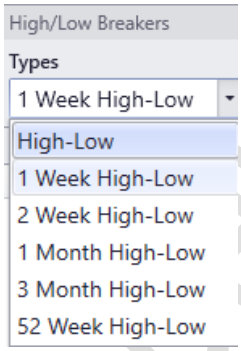
It has time based filters which detects new highs/lows over:

- 1 Week
- 2 Week

- 1 Month
- 3 Month
- 52 Week

In short, **High Low Breaker** Scanner tracks price milestones to surface breakout and breakdown candidates across timeframes.



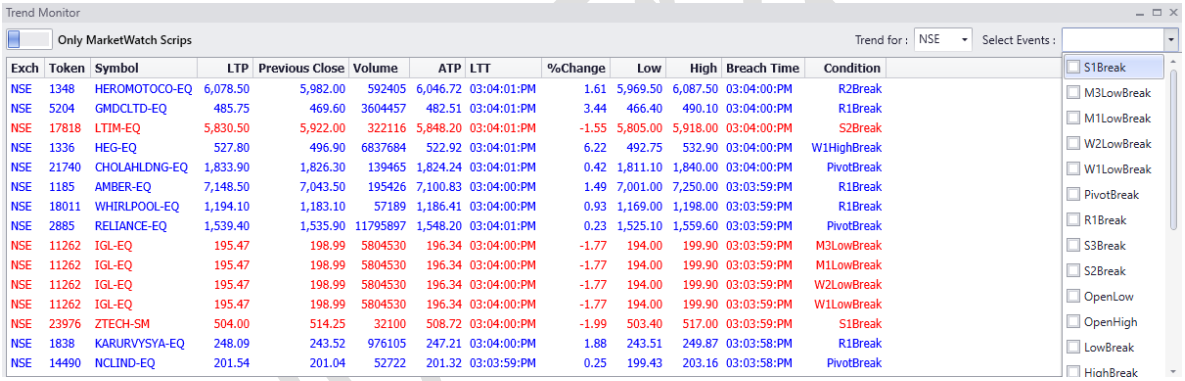


6.7 Trend Monitor

The **Trend Monitor** scanner tracks real-time price behavior across stocks to identify **technical breakout and breakdown patterns**. It helps users' spot directional momentum, trend reversals, and key price level breaches using predefined conditions.

It has ready conditions like

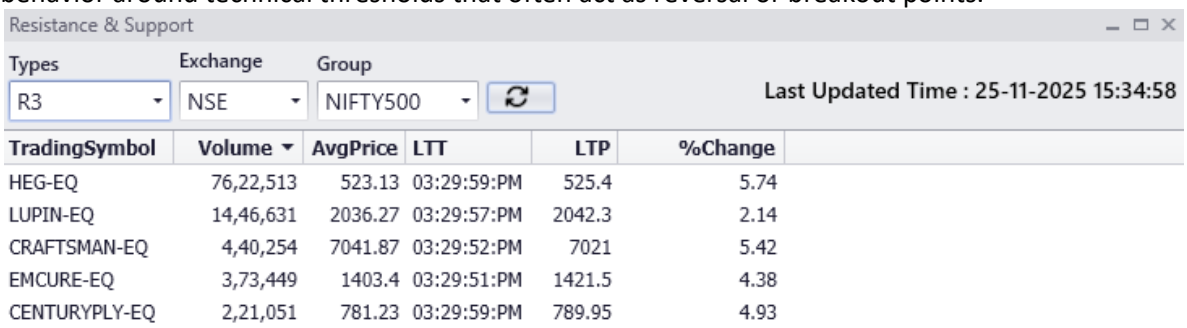
- **S1Break / S2Break / S3Break:** Price breaks below Support levels 1, 2, or 3.
- **R1Break/R2Break/R3Break:** Price breaks above Resistance level 1, 2 or 3.
- **PivotBreak:** Price crosses the central pivot point, indicating trend shift.
- **M1LowBreak / M3LowBreak:** Price breaches 1-month or 3-month low.
- **W1LowBreak / W2LowBreak:** Price breaches 1-week or 2-week low.
- **OpenLow / OpenHigh:** Opening price equals day's low or high, signaling early sentiment.
- **HighBreak / LowBreak:** Price breaches recent high or low levels.
- **Lower Circuit / Upper Circuit:** Stocks hitting exchange-defined circuit limits.



Exch	Token	Symbol	LTP	Previous Close	Volume	ATP	LTT	%Change	Low	High	Breach Time	Condition
NSE	1348	HEROMOTOCO-EQ	6,078.50	5,982.00	592405	6,046.72	03:04:01:PM	1.61	5,969.50	6,087.50	03:04:00:PM	R2Break
NSE	5204	GMDCLTD-EQ	485.75	469.60	3604457	482.51	03:04:01:PM	3.44	466.40	490.10	03:04:00:PM	R1Break
NSE	17818	LTIM-EQ	5,830.50	5,922.00	322116	5,848.20	03:04:01:PM	-1.55	5,805.00	5,918.00	03:04:00:PM	S2Break
NSE	1336	HEG-EQ	527.80	496.90	6837684	522.92	03:04:01:PM	6.22	492.75	532.90	03:04:00:PM	W1HighBreak
NSE	21740	CHOLAHLDNG-EQ	1,833.90	1,826.30	139465	1,824.24	03:04:01:PM	0.42	1,811.10	1,840.00	03:04:00:PM	PivotBreak
NSE	1185	AMBER-EQ	7,148.50	7,043.50	195426	7,100.83	03:04:00:PM	1.49	7,001.00	7,250.00	03:03:59:PM	R1Break
NSE	18011	WHIRLPOOL-EQ	1,194.10	1,183.10	57189	1,186.41	03:04:00:PM	0.93	1,169.00	1,198.00	03:03:59:PM	R1Break
NSE	2885	RELIANCE-EQ	1,539.40	1,535.90	11795897	1,548.20	03:04:01:PM	0.23	1,525.10	1,559.60	03:03:59:PM	PivotBreak
NSE	11262	IGL-EQ	195.47	198.99	5804530	196.34	03:04:00:PM	-1.77	194.00	199.90	03:03:59:PM	M3LowBreak
NSE	11262	IGL-EQ	195.47	198.99	5804530	196.34	03:04:00:PM	-1.77	194.00	199.90	03:03:59:PM	M1LowBreak
NSE	11262	IGL-EQ	195.47	198.99	5804530	196.34	03:04:00:PM	-1.77	194.00	199.90	03:03:59:PM	W2LowBreak
NSE	11262	IGL-EQ	195.47	198.99	5804530	196.34	03:04:00:PM	-1.77	194.00	199.90	03:03:59:PM	W1LowBreak
NSE	23976	ZTECH-SM	504.00	514.25	32100	508.72	03:04:00:PM	-1.99	503.40	517.00	03:03:59:PM	S1Break
NSE	1838	KARURVYSYA-EQ	248.09	243.52	976105	247.21	03:04:00:PM	1.88	243.51	249.87	03:03:58:PM	R1Break
NSE	14490	NCLIND-EQ	201.54	201.04	52722	201.32	03:03:59:PM	0.25	199.43	203.16	03:03:58:PM	PivotBreak

6.8 Resistance/Support

The **Resistance & Support Scanner** identifies stocks trading near or breaching key **pivot levels**, including support (S1, S2, S3) and resistance (R1, R2, R3) zones. It helps users monitor price behavior around technical thresholds that often act as reversal or breakout points.



TradingSymbol	Volume	AvgPrice	LTT	LTP	%Change
HEG-EQ	76,22,513	523.13	03:29:59:PM	525.4	5.74
LUPIN-EQ	14,46,631	2036.27	03:29:57:PM	2042.3	2.14
CRAFTSMAN-EQ	4,40,254	7041.87	03:29:52:PM	7021	5.42
EMCURE-EQ	3,73,449	1403.4	03:29:51:PM	1421.5	4.38
CENTURYPLY-EQ	2,21,051	781.23	03:29:59:PM	789.95	4.93

It has below filters

- **Resistance Levels (R1–R3):** Indicate potential price ceilings or breakout zones.
- **Support Levels (S1–S3):** Indicate potential price floors or bounce zones.
- **P (Pivot Point):** Central reference level derived from prior price action

7 Window Menu

7.1 App Theme

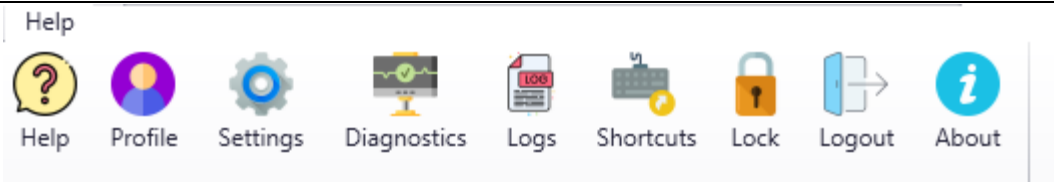
The **App Theme** module allows users to customize the **visual appearance** of the trading application interface. It enhances user experience by offering multiple style presets that suit different aesthetic preferences and working environments.

Theme Options:

- **Express Style**
- **Office Black**
- **Office Colorful**
- **Sea Blue**

Instant Preview: Changes apply immediately for real-time feedback.

8 Help Menu



8.1 Help

The **Help Menu** provides users with quick access to **support resources, feature guidance, and troubleshooting tools** within the application. It ensures smooth on boarding, efficient issue resolution, and clarity on platform functionality.

8.2 Profile

The **User Profile** module provides a comprehensive overview of a user's identity, trading permissions, and account-level configurations within the platform. It serves as the central hub for managing user roles, exchange access, product eligibility, and operational actions.

It is also containing action control features like

- **Reconcile App** - Syncs user-specific settings, permissions, and entitlements with backend systems to ensure consistency across modules.
- **Refresh Entities** - Updates the user's exchange access, product eligibility, and role-based configurations in real time. Useful after backend changes.
- **Backup Settings -** Backup Settings safeguard application data and user configurations, ensuring reliability, compliance, and quick recovery.
- **Change Password / Settings** - Allows the user to update login credentials and customize personal or trading preferences.
- **View KRA Status** - Displays the current Know Your Client (KYC/KRA) verification status, including PAN linkage and compliance flags.
- **Freeze Account** - Temporarily disables trading and account activity for the user, typically used for compliance, risk, or user-requested suspension.

8.3 Settings

❖ **General**

- **Appearance**
  Style Selection: Choose from themes like *Express Style* for visual customization.
  Toggle features such as:

- Float SpotRates
- Quick Script Search
- GridLines visibility
- StatusBar display
- Prompt Reconcile
- Show StatusBar

- **Reload**

  Refresh Entities: Updates user details, exchange access, and product configurations.
  Reconcile App: Syncs frontend settings with backend systems for consistency.
  Customize TitleBar: Select elements to display in the title bar as per choice.

- **Others**

  AutoLock Interval: Sets inactivity timeout for security.
  Toast Timeout: It is a **duration (in seconds)** for which a **toast notification**—a small popup message—remains visible on the screen before automatically disappearing.
  IV Precision: Controls decimal accuracy for implied volatility.
  Text Font Settings: Adjust font size and family (e.g., Tahoma).
  Chart Preferences: Choose between *TradingView* or *External Browser*.
  External Browser: Choose to open charts in external browser
  Tab Positioning: Set tab layout (e.g., Top).

- **Option Greeks**

  Volatility / Risk-Free Rate / IV Source: Customize inputs for option pricing models.

❖ **Order**

- **Exchange Default Values**

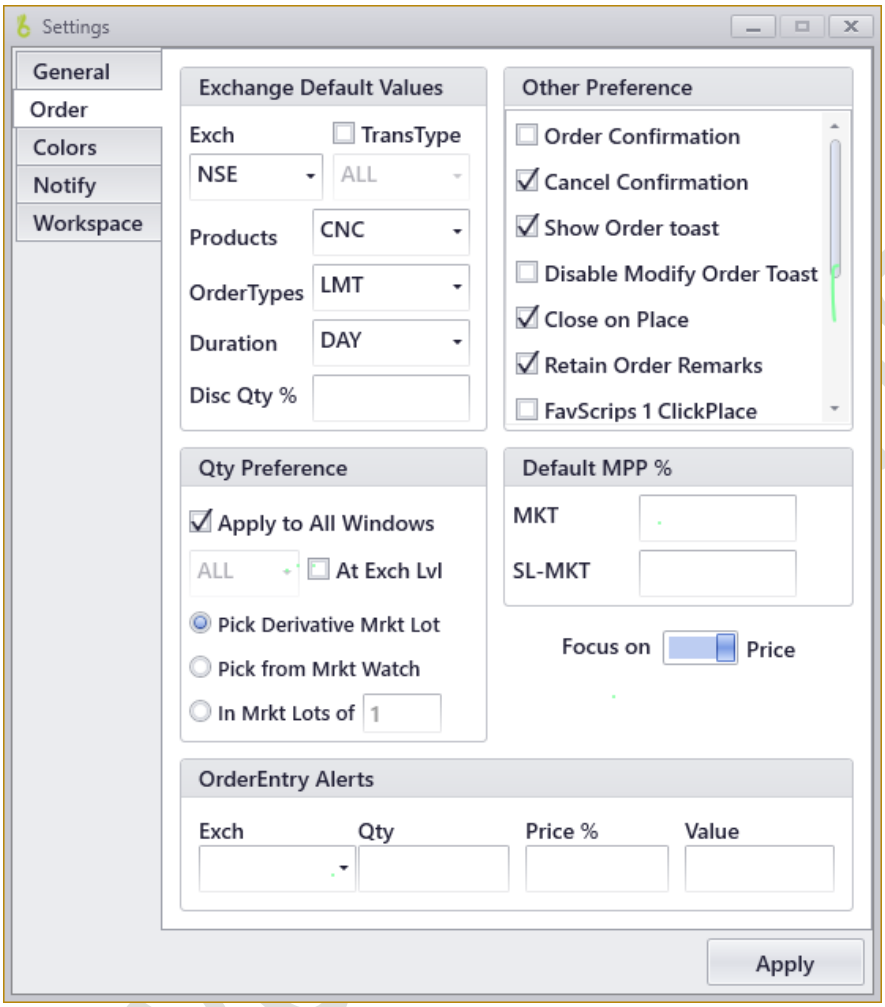
  Set default exchange wise transaction type, product (e.g., CNC/MIS), order type (e.g.,LMT/Market), and duration (e.g., DAY/IOC) along with default Disclosed qty

- **Quantity Preferences**

  Apply quantity logic across all order windows across all exchanges or select specific exchange

  Pick Derivative Market Lot: Auto-pick lot size from market watch or define custom lot multiplier.

- **Other Preference**



Enable/disable:

- **Order confirmation** - Prompts a confirmation dialog before placing any order to prevent accidental trades.
- **Cancel confirmation** - Displays a confirmation prompt before canceling an existing order.
- **Show Order Toast** - Shows a popup notification (toast) after an order is placed for quick feedback.
- **Disable Modify Order Toast** - Suppresses popup notifications when modifying an existing order.
- **Close on Place** - Automatically closes the order entry window once the order is successfully placed.

- **Retain Order Remarks** - Keeps user entered remarks intact for reuse in subsequent orders.
- **FavScrips 1 ClickPlace** - Enables one click order placement for favorite scrips to speed up execution.
- **Clear Account on Place** - Resets/clears account selection after order placement to avoid unintended reuse.
- **Skip DiscQty TabStop** - Skips the disclosed quantity field during tab navigation for faster order entry
- **Skip Freeze Qty Confirmation** - Bypasses confirmation prompts when freezing order quantities.
- **Holding Info In MarketWatch** - Displays user's holding information directly in the MarketWatch window for quick reference.

- **Default MPP%**

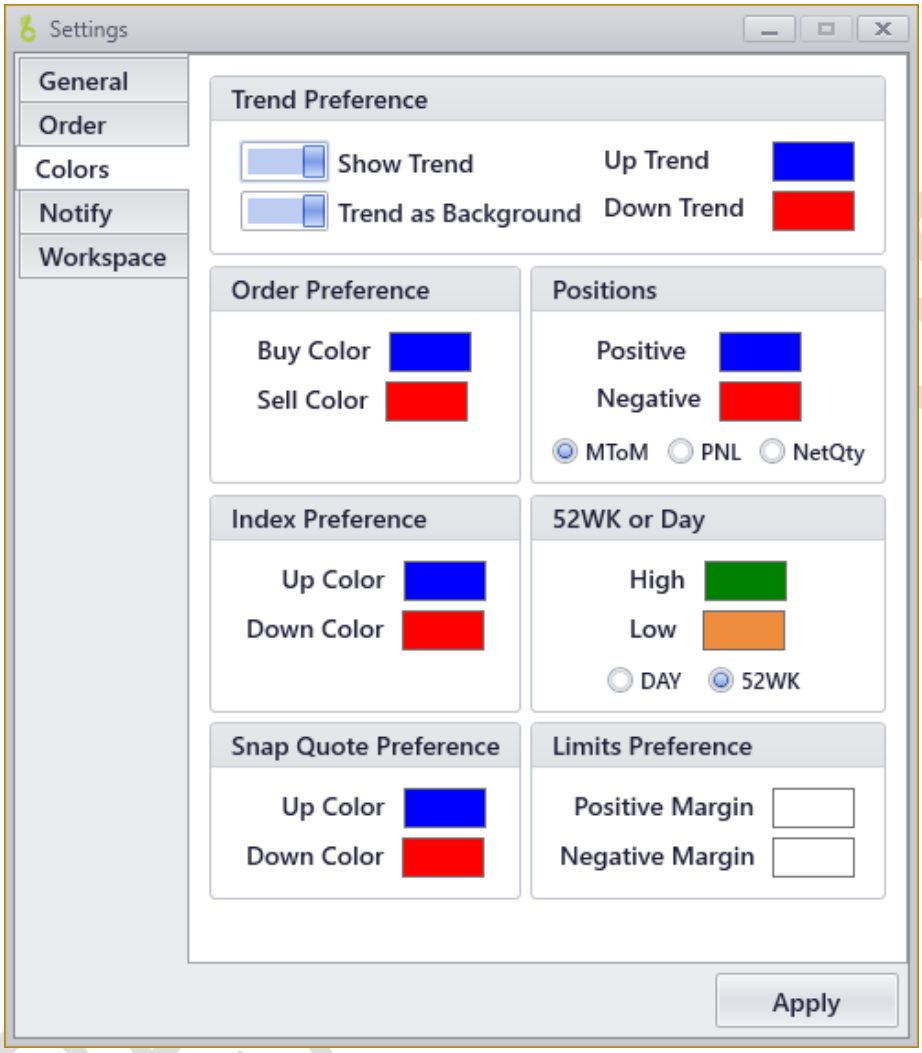
  Pre-select order types like **MKT** and **SL-MKT** for quick entry.
  MKT: [X]% – Sets the default price buffer percentage for Market orders to protect against slippage.
  SL-MKT: [X]% – Sets the default price buffer percentage for Stop Loss Market orders to ensure controlled execution.

  Focus Behavior

  Define default cursor focus (e.g., Price field) for faster order input.

- **OrderEntry Alerts**
  Configure thresholds for alerting based on:
  - Quantity
  - Price deviation (%)
  - Order value

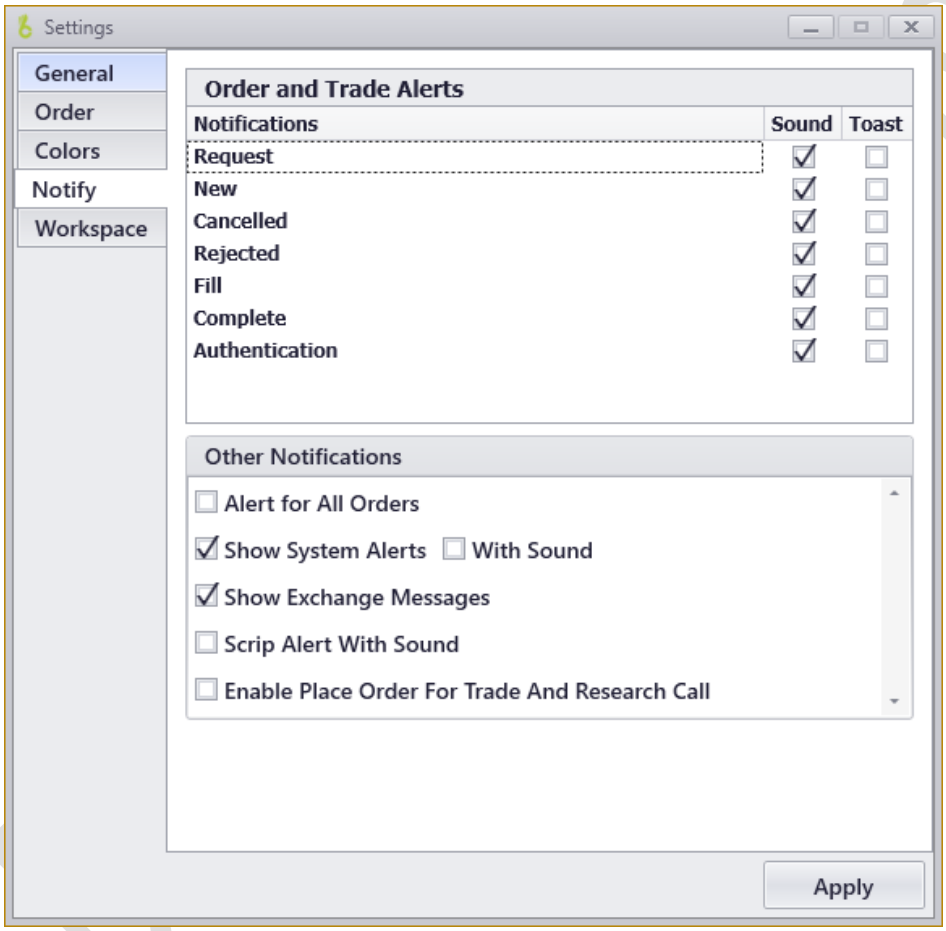
❖ **Colors**



- **Trend Preference -**Toggle trend visibility and set background color for up/down trends.
- **Order Preference -** Define color codes for Buy and Sell actions.
- **Positions -** Assign colors for positive/negative positions and choose display metric (MTM, PNL, NetQty).
- **Index Preference -** Set color indicators for rising or falling indices.

- **52Wk or Day -** Customize colors for 52-week or daily extremes.
- **Snap Quote -** Configure up/down color cues for live quotes.
- **Limits Preference** - Visualize margin status with positive/negative color codes.

❖ **Notify**



- **Order and Trade Alerts**

  Notification Types: Includes Request, New, Cancelled, Rejected, Fill, Complete, and Authentication.

  Sound Alerts: Audible cues for selected events to ensure immediate attention.

  Toast Alerts: On-screen popup for visual confirmation of trading actions.

- **Other Notifications**

  Alert for All Orders - Displays a notification for every order action (placement, modification, cancellation).

  Show System Alerts - Enables visibility of system-generated alerts such as connectivity issues, sync failures, or backend updates.

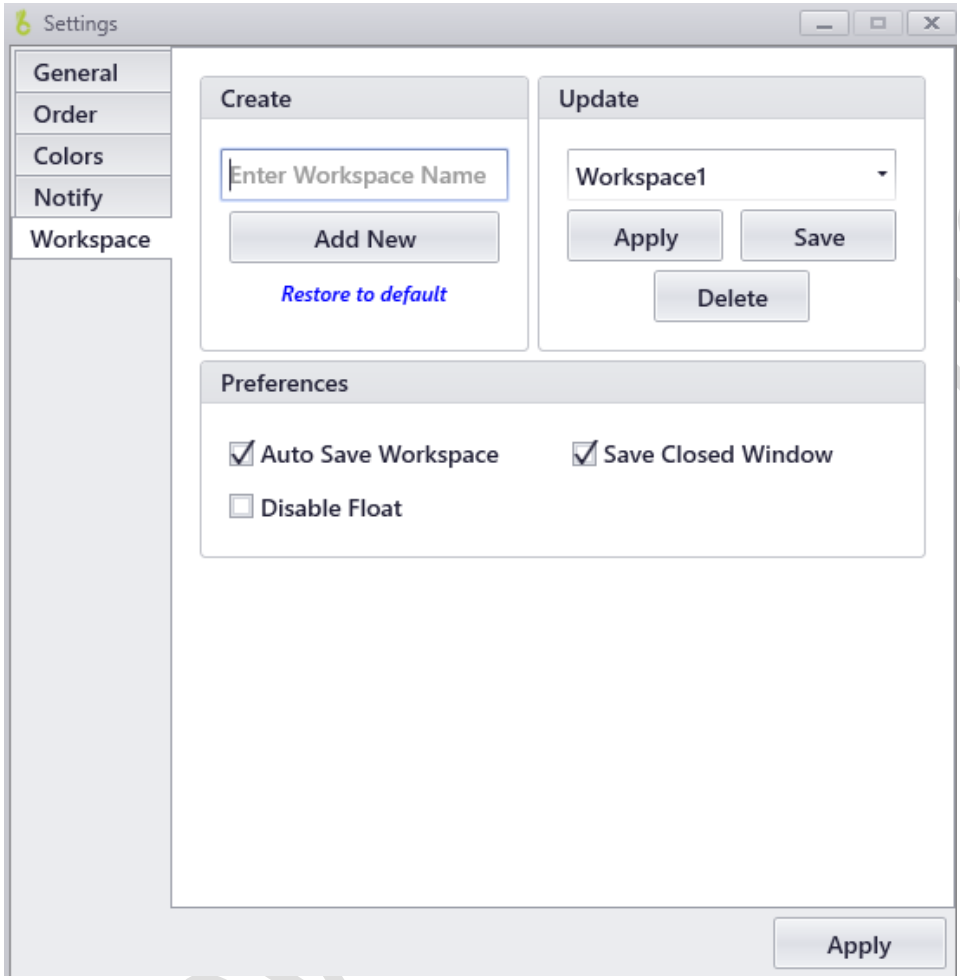
  With Sound – Adds an audible alert to system or order notifications for enhanced visibility and quick response.

  Show Exchange Messages - Displays real-time messages or broadcasts from exchanges (e.g., NSE, BSE) within the platform

  Scrip Alert With Sound - Triggers sound-based alerts for predefined scrip-level conditions like price movement or volume spikes.

  Enable Place Order For Trade & Research Call - Allows direct order placement from trade recommendations or research calls published within the platform

❖ **Workspace**

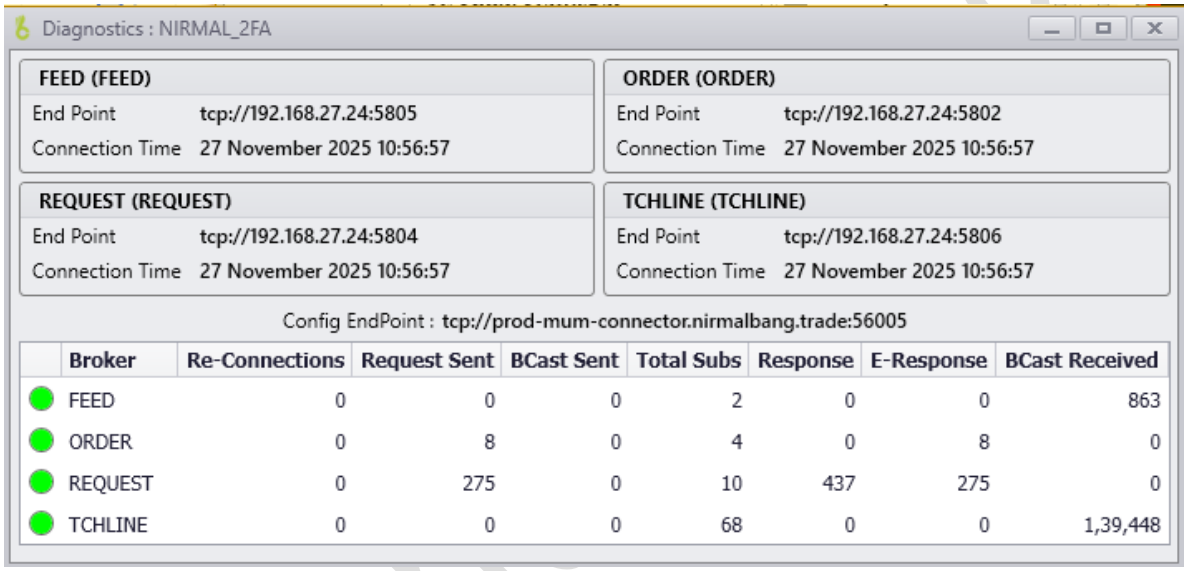


- **Create -** Define and save custom workspace names and click no 'Add New'
- **Update -** Apply, save, or delete existing workspace configurations.
- **Preferences**
  Auto Save Workspace: Automatically saves layout changes during session.
  Save Closed Window: Retains closed window states for restoration.
  Disable Float: Prevents floating windows to maintain fixed layout structure.

8.4 Diagnostics

This form captures real-time connectivity and operational metrics for the trading system across four broker modules: **FEED**, **ORDER**, **REQUEST**, and **TCHLINE**.

- **Stable connections**: No reconnections across all modules.
- **High broadcast activity**: TCHLINE and FEED are actively receiving data.
- **REQUEST broker**: Actively handling requests with significant error responses.
- **ORDER broker**: Subscribed but idle in terms of data exchange.



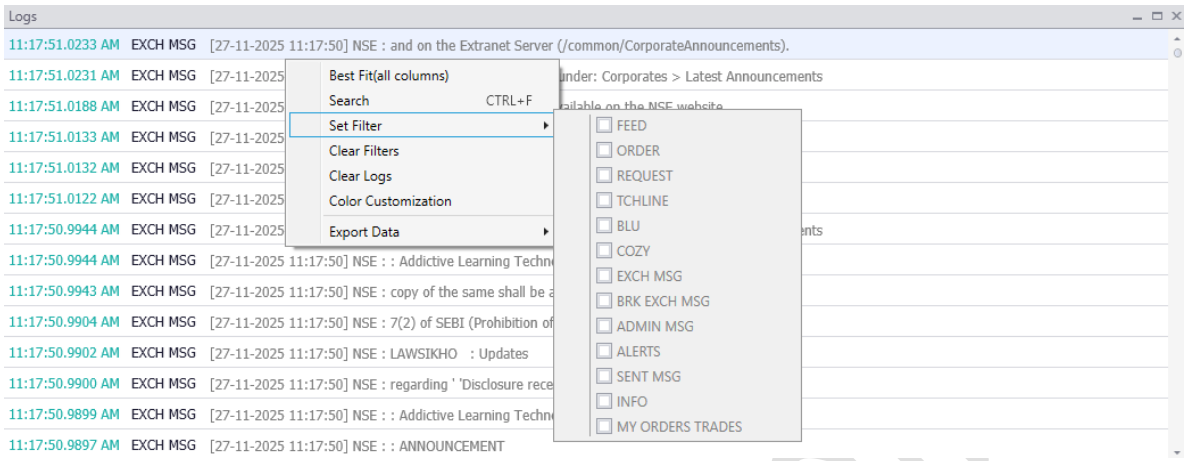
Broker	Re-Connections	Request Sent	BCast Sent	Total Subs	Response	E-Response	BCast Received
FEED	0	0	0	2	0	0	863
ORDER	0	8	0	4	0	8	0
REQUEST	0	275	0	10	437	275	0
TCHLINE	0	0	0	68	0	0	1,39,448

8.5 Logs

The Logs interface provides a chronological record of system-generated messages across various broker and administrative channels within the trading application. It supports real-time monitoring, filtering, and analysis of operational events.

Message Types: Supports diverse categories such as:

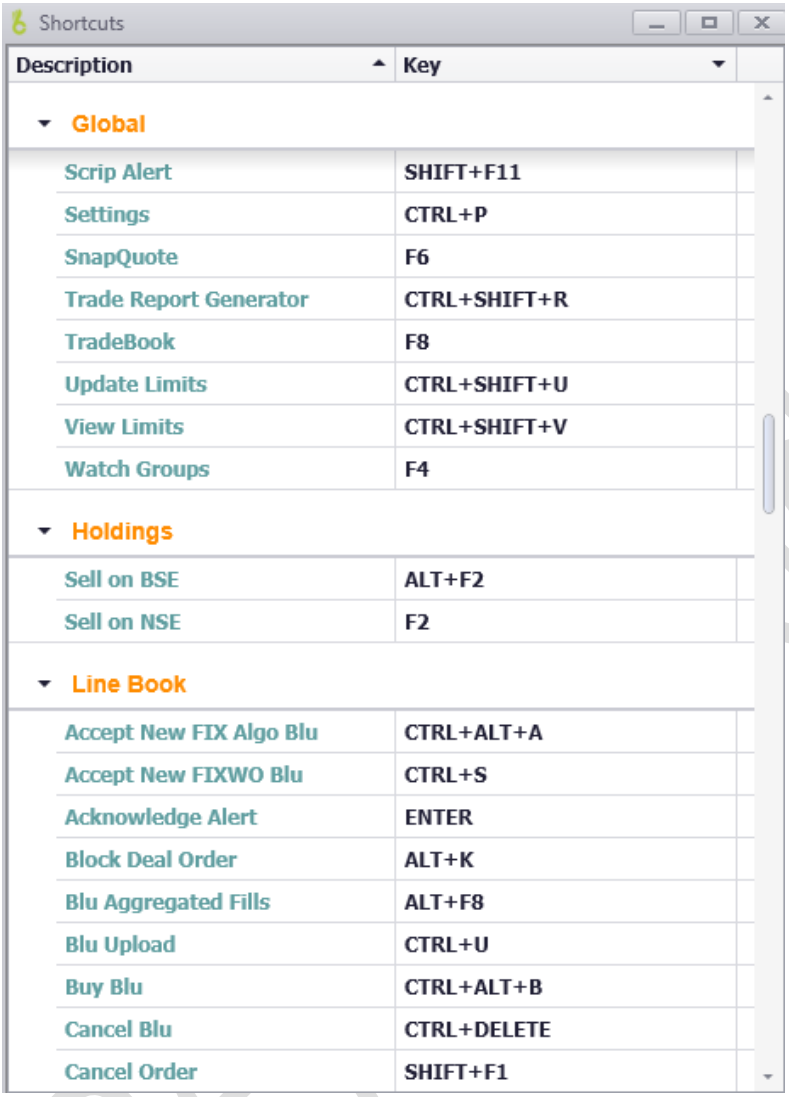
EXCH MSG (Exchange messages), REQUESTS,ADMIN MSG,ALERTS ,MY ORDERS TRADES etc types of logs are captured. Users can refine view using the “Set Filter” option to see specific category messages.



8.6 Shortcuts

The Shortcut Module provides users with quick-access key combinations to streamline navigation and execution of core functions across the trading platform. Shortcuts are grouped by operational context for clarity and efficiency.

These are fixed shortcuts and cannot be modified.



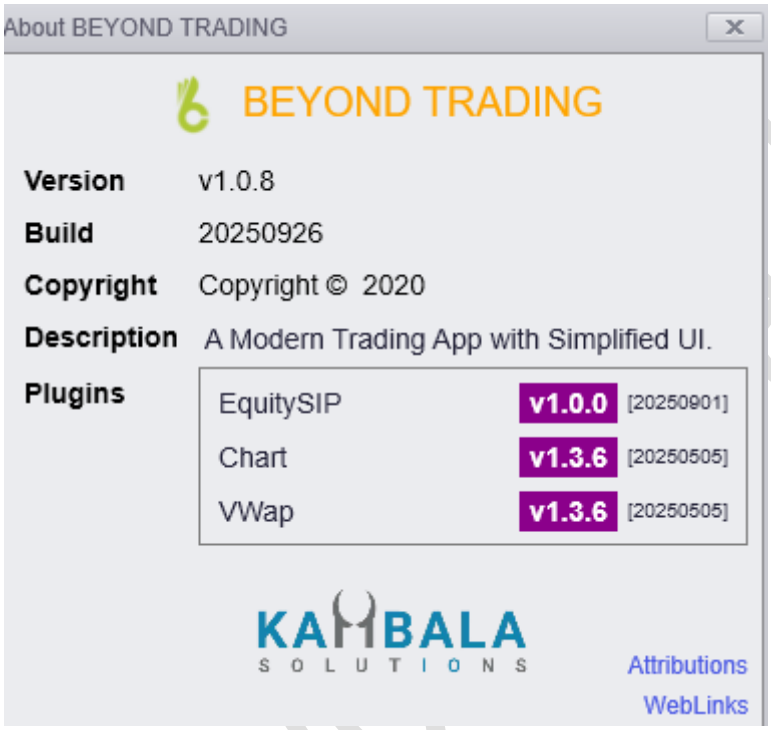
8.7 Lock

The **Lock Application** feature is designed to temporarily restrict user access to the trading interface without terminating the session. It ensures security during idle periods or when the user steps away, while preserving the current state of the application.

8.8 Logout

The **Logout** functionality allows users to securely exit the trading application, ensuring that all active sessions are terminated and access is restricted until valid credentials are re-entered.

8.9 About

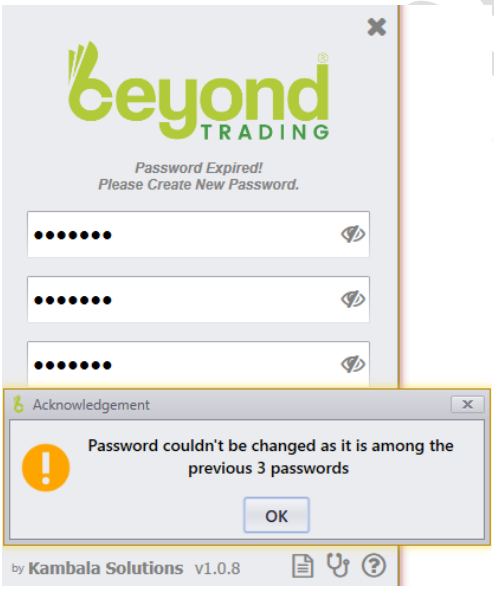


9. Password Policy

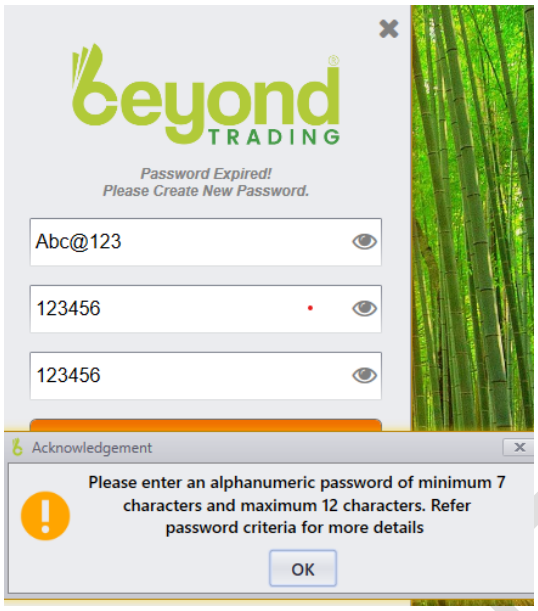
Password functionality provides the user facility to change the login and transaction password. The following needs to be adhered which changing the password:

- System mandated changing of password when the user logs in for the first time.

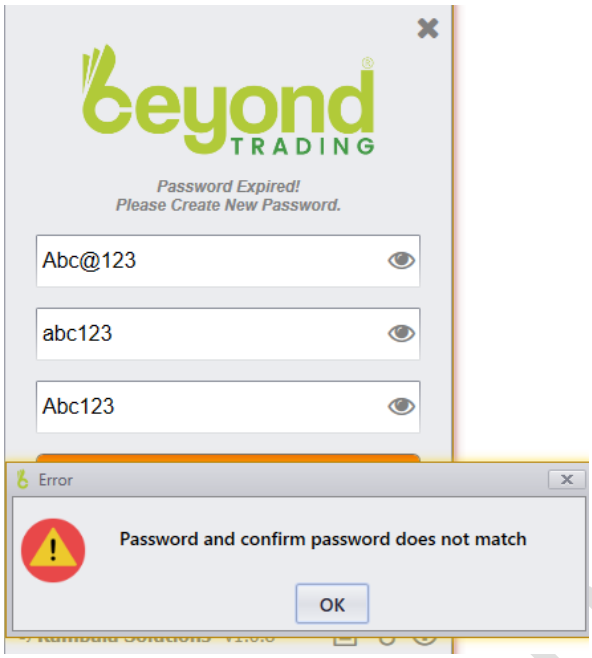
- System controls to ensure that the changed password cannot be the same as of the last password



- System controls to ensure that the password is alphanumeric (preferably with one special character), instead of just being alphabets or just numerical.



- Password and confirm password cannot be same



- Automatic expiry of password