2026



Sanchay Shastra

DHAN PRABANDHA KARAR

CLIENT NAME

Confidential

Welcome to Sanchay Shastra.

This Dhan Prabandha Karar ("Portfolio Management Agreement") is made and entered into on this _____ day of _____, 2026, by and between:

Dhan Prabandhak (Portfolio Manager):

Name: _____

E-Mail: _____

Phone: _____

AND

Client:

Name: _____

E-Mail: _____

Phone: _____

Collectively referred to as the "Parties."

Dhan Prabandha (Portfolio Management) Agreement

This Agreement is made between **Sanchay Shastra**, hereinafter referred to as the **Dhan Prabandhak (Manager)**, and the undersigned client, hereinafter referred to as the **Client**.

The Client agrees to engage the **Dhan Prabandhak (Manager)** to manage their investment using **Sanganak Verified Strategies**, and the **Dhan Prabandhak (Manager)** agrees to provide the service under the following terms and conditions:

1. Investment Strategy

The **Dhan Prabandhak (Manager)** will manage the Client's **Dhan Prabandha (Portfolio Management)** based on **Sanganak Verified Strategies** for Futures and Options (FNO) and Equity. The strategies may involve **Intraday Trading** or **Swing Trading**, where Swing trades will have a maximum holding period of **One Week**.

2. Investment Requirements

The Client must make an initial investment according to one of the following plans:

- **Plan A**: Minimum investment of INR 50,000, with additional investments allowed in multiples of INR 50,000. Only the Hindsight Strategy will be deployed, and 1 lot of options will be traded per the minimum investment.
- **Plan B**: Minimum investment of INR 1,00,000, with additional investments allowed in multiples of INR 1,00,000. Strategies deployed will be Hindsight, Portal & Border with 1 lot of options per the minimum investment.

3. Lock-in Period

The Client agrees to a **6-month lock-in period** for their investment. During this time, withdrawals are not permitted. After the lock-in period, the Client may withdraw funds, and the quantities will be adjusted as per the current invested amount.

A security deposit of INR 5,000 will be charged for the 6-month lock-in period. If the Client chooses to terminate the services during the lock-in period, this security deposit will be forfeited.

4. Management Fees

Management fees will be as follows:

- Dhan Prabandha: INR 2,999 per month
- Dhan Prabandha Pro: INR 3,999 per month

These fees apply irrespective of the lot size the Client decides to start with.

The management fee is payable irrespective of the profits or losses incurred during the month. No adjustment, waiver, or refund shall be made on account of trading losses, reduced trading activity, or the Client's decision to temporarily refrain from trading.

The Client is responsible for ensuring timely payment of management fees and renewal of the applicable subscription. Trading services shall resume only after the required payments and subscription formalities have been completed, subject to operational readiness.

If the monthly management fees are not paid, trading will be discontinued. Additionally, if the subscription is not renewed one day before expiration, trading services will also be discontinued.

5. Reporting

The **Dhan Prabandhak (Manager)** will provide **timely reports** on the performance of the Dhan Prabandha (Portfolio Management). Clients can contact **support@sanchayshastra.com** for any queries. **Asset allocation updates** will not be provided in these reports.

6. Know Your Client (KYC) Documents

The Client is required to submit full and verified KYC documents before services commence. This includes:

- **PAN Card**
- **ADHAR Card**
- **Address Proof**

Failure to provide these documents may result in a delay in the initiation of the Dhan Prabandha (Portfolio Management) services.

7. Client's Demat Account Access

The Client will provide their **User ID, Password, and TOTP** for their Demat account to the **Dhan Prabandhak (Manager)** for trading purposes. **Sanchay Shastra guarantees that this sensitive information will never be misused and will only be used for trading while the Client is an active member of the firm.** The information will not be shared or used for any purpose other than the agreed trading activities.

The **Dhan Prabandhak (Manager)** does not have access to the Client's Demat account for the purposes of fund withdrawal or addition. Setting up the account, adding funds, and making withdrawals are the Client's responsibility.

After termination of the service, **the Dhan Prabandhak (Manager)** will destroy all sensitive data (User ID, Password, TOTP) to ensure no misuse occurs, in front of the Client.

8. Termination of Services

The Client may terminate this Agreement after the lock-in period without incurring any termination charges.

If the Client terminates the services during the lock-in period, security deposit of **INR 5,000** will be forfeited; it will not be refunded at the end of the original lock-in period.

Lock In Period Start Date: _____/_____/____

Lock In Period End Date: _____/_____/____

The **Dhan Prabandhak (Manager)** reserves the right to terminate any account at any time. If the account is terminated by the **Dhan Prabandhak (Manager)** during the lock-in period, the security deposit of INR 5,000 will be refunded to the Client.

9. Blanket Approval for Trades

By entering this agreement, the Client provides **blanket approval** for all trades executed by the **Dhan Prabandhak (Manager)** using **Sanganak Strategies**. The Client acknowledges that the **Dhan Prabandhak (Manager)** will have complete discretion over the trades and investment decisions within the scope of this agreement.

10. Limitation of Liability

The **Dhan Prabandhak (Manager)** will only be responsible for the trades executed using **Sanganak Strategies**. Any trades made by the Client independently or based on advice from external parties will not be the responsibility of the **Dhan Prabandhak (Manager)**.

The **Dhan Prabandhak (Manager)** will not be responsible for any technical or software errors from the broker's side, including but not limited to:

- Delays in order execution
- Calculation or transactional errors
- Technical glitches or interruptions in the broker’s system

Any fees or charges levied by the broker are the Client's responsibility. The **Dhan Prabandhak (Manager)** is only responsible for the performance of the **Sanganak Strategies** and any technical or software issues within its own system.

11. Liability and Indemnity

The Client agrees that the **Dhan Prabandhak (Manager)** will not be liable for any loss or damage that may occur because of market risks, execution delays, or other circumstances beyond the control of the **Dhan Prabandhak (Manager)**. The Client indemnifies the **Dhan Prabandhak (Manager)** from any legal actions, claims, or disputes arising from losses incurred during executing trades.

12. Confidentiality

The **Dhan Prabandhak (Manager)** agrees to keep all information provided by the Client, including their User ID, Password, TOTP, and other sensitive data, confidential. This information will only be used for the purposes outlined in this agreement and will not be shared with third parties unless required by law.

After the termination of services, the **Dhan Prabandhak (Manager)** will ensure that all sensitive data provided by the Client is securely destroyed to prevent any future misuse.

13. Jurisdiction

This agreement shall be enacted in **India**, and the jurisdiction will be in accordance with **Indian laws**. It is applicable only to **Indian citizens**.

IN WITNESS WHEREOF, the Parties hereto have executed this Agreement as of the date first above written.

Dhan Prabandhak: _____ (Signature)

Date: _____

Client: _____ (Signature)

Date: _____