

Click to prove  
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The purpose of this section is to give you a clear idea about your portfolio at any given point of time, so that you can track and assess the performance of your portfolio, compare it to other portfolios and tweak it whenever needed.

**SECTION WISE DESCRIPTION**

**Home Page Link**

When you open the Home page, you can easily spot the overall details of your portfolio on a dark card on the Home page itself, right below the Market Today section. Here you can check your Portfolio Market Value. This is the real-time market value of all your assets combined, shown at the top left of the card.

**Hide icon**

Clicking this eye-shaped icon will hide all the information in this card and the Portfolio section, except percentage gains or losses. Clicking it again will show all the values again.

**Overall gain (loss)**

The difference between market value and the total amount you have invested. The overall gain or loss is shown both in absolute terms and percentage terms).

**Breakup**

You will find the overall breakup of your investments in terms of asset types i.e. Mutual Funds, Equity and SGB. The market value of each category will be shown.

**Thereafter**, if you click this box (where the above details are being shown) or if you click directly on the Portfolio section at the bottom of the page, you will be taken to the Portfolio page.

**Super Portfolio**

When you click the Portfolio section of the app, you can view your holdings in multiple asset classes. Your portfolio will thus be divided into the following tabs

**All Equity**

**Mutual Fund**

**SGB**

**All**

You can start exploring your Portfolio from the section titled All under your Portfolio. On top, you will see the summarised performance of your overall portfolio via the following information

**Total market value** of your portfolio i.e. how much cash a buyer has to pay to buy all the assets that you hold on the app.

**Overall gain or loss** in the portfolio over time both in absolute and percentage terms.

**Invested value** i.e. the amount of money that you have paid to buy the assets that you currently hold.

**Today's gain or loss** of your entire portfolio both in absolute and percentage terms.

**On the bottom right** of the portfolio summary, you will see the option to **VERIFY TO SELL**. Basically, if you want to sell equity, you will have to get authorisation by entering the TPIN and enter an OTP for the CDSL i.e. Central Depository Services (India) Ltd, on their website. Once you get authorisation, it remains valid for the day.

**Here is the process of verifying to sell:**

Click on **VERIFY TO SELL**. Click on **PROCEED**. Enter your TPIN. It will probably be available on your registered emails inbox. Enter the OTP sent to your registered mobile number or email.

**Below portfolio summary card**, you will see each category of investment i.e. equity, mutual funds and SGB. Each asset category will have the following information below it:

Your overall gain or loss, both in absolute and percentage terms in each asset category.

The invested value and current value of your investments in that category.

Invested value is what you paid to obtain those assets.

Current value is what others must pay to buy your assets at the current market prices.

In case you have not invested in anything under that category, you will see a button saying **GET STARTED**. Clicking it will take you to the page related to that asset where you can find assets from that category that you can buy.

**Finally**, at the bottom, you have direct links to:

**Trades and Charges**

**Profit and Loss**

**Active Mutual Fund SIPs**

**Takes you to the SIPs page** of the mutual fund section of the app.

**Active Stock SIPs**

**Takes you to the Stock SIP section** of the Orders section of the app.

**Figure:** Initial Portfolio screen under the All tab along with quick links under Tools (left) and equity holdings page (right).

**Equity**

From All, scroll rightward to reach the Equity page which lists all the stocks that you ordered to be delivered to your demat account. This means, if you place a trade today under Delivery mode, it will be reflected on your portfolio page immediately. In case you have placed an Intraday order, then that asset will not be reflected on your Portfolio page.

Once you open the Equity page, you will see on top a dark box showing the following values related solely to your equities

**Market value** of your equity investments

**Overall gain or loss** in both absolute and percentage terms

**Invested value**, i.e. amount that you have paid to own the equity assets held by you

**Today's gain or loss** i.e. by how much absolute and percentage value has your equity holdings gone up or down in value since the closing of the previous trading day.

Below the box, you will see each of the companies whose stocks you have bought. Next to each name, you will see the following information

**Number of shares** you bought of the company (suppose it is X) multiplied by the average of the prices you bought those shares at (suppose it is Y). Therefore, you will see X\*Y. Performing that multiplication will give you the total money you have spent to acquire all those shares in that particular company.

**Overall gain or loss** made from stocks in that particular company, both in absolute and percentage terms.

If you have bought 15 stocks of a company, worth 500 each, and have made a profit of 25 per share on an average, then the overall gain will show as 375 and the percentage gain will show as 5%.

Below it, you will see the LTP or the last traded price of that particular stock. It is basically the current market price of that stock.

Next to LTP, in brackets, you will see the days gains or losses in percentage terms in the share price of that company. So if the value of the share of that company falls by 2% since the closing of the previous trading day, then 2% is what will be shown in the brackets next to the LTP.

You can search the name of any company or stock from the search bar on this page.

You can also put filters on the portfolio list and sort them as per your preference by clicking the sort/filter icon beside the search bar.

From the Sort sleeve, you can also activate a detailed view of the stocks, which will show you the following additional variables for each stock

**Invested value** and current value of the stocks bought of the company.

**Today's gain or loss** in both absolute and percentage terms.

You can sort or arrange the list of stocks in the following ways:

**Alphabetical order**

**LTP change** i.e. the daily positive change in the LTP e.g. if you choose LTP change as high to low, the stock whose price has fallen by 0.9% or risen by 0.5% will come below the stock whose price has risen by 0.7%.

**Overall gain and loss** choosing this as high to low will place the asset which gave the highest overall gain at the top and vice versa.

You arrange them both in terms of absolute and percentage overall gain and loss.

**Average buy price** You can filter the list of stocks in the following ways:

**Price movement**

You can choose to view only the days gainers or losers i.e. even if a stock has made overall gains, if it has lost value that day, it will come under losers here.

**Unrealised gain or loss**

You can choose to view only those stocks that have made either overall profit or overall loss for you. Note, that profit and loss terms here do not consider the brokerage and other fees or taxes paid as a cost.

**Product type**

You can choose to view only delivery or intraday orders.

**Market cap**

You can choose to view only small cap, mid cap, large cap stocks.

**Sector**

You can choose to view stocks that you have from a particular sector. All the sectors represented in your portfolio will be shown here. For example, if you have one stock from Plastic Products and one from Logistics then Logistics and plastic Products will be shown as available options in this list. Clicking on Logistics will show you only the stocks of the logistics company.

**Stock type** e.g. ETF, equity, etc.

Coming back to the Portfolio dark box, on the bottom left of the dark box, you will find the option to **ANALYZE** your Portfolio and on the bottom right you will see **VERIFY TO SELL**. We have already discussed verifying to sell. Let us now discuss the Portfolio Analyser.

**Portfolio Analyser**

It is important that as your portfolio grows, your ability to track each and every asset of your portfolio as well as tweak the portfolio as per changing circumstances should not decrease.

Therefore, we have for you the Portfolio Analyser which can help you understand the composition of your portfolio in terms of Market i.e. your equity investments categorised in terms of Small/Medium/Large Stocks.

**Sectors** i.e. your equity investments categorised in terms of the sector that they are in.

**Top Holdings** i.e. showing how concentrated your investments are in your top holdings by market value.

For each category, you will see the current market value of your investment and the unrealised gains and losses you currently have in percentage terms.

You can check the proportion of the specific asset types in your portfolio based and their respective performances.

**Figure:** Portfolio analyser: Market Capitalisation-based analysis (left), Sector-based analysis (middle) and analysis of top holdings (right)

If you click on an individual asset in your portfolio page and scroll down to the bottom, you will see two new, innovative options that we have added

**Holdings Breakup** and **Dividend Earned**.

**Holdings Breakup** will give you the details of your holding, including Quantity of assets bought

**Average traded price** at which the trade was made

**Total amount paid/received** in that trade

**Date of the trade**

**Figure:** Dividends Earned page (right)

Under the Dividend Earned page, you can view the list of the dividends paid to your account and the date when it was paid. The following information will be visible

**Date of the payment of dividend**

**Total dividend amount received** in your account on each individual date (in the list)

**Total dividend earned** in the financial year (in the green box) at the bottom

You can change the financial year for which the dividends you are viewing by clicking the required financial year on the top of the page.

**Mutual Funds and SGBs**

From Equity, if you scroll right, you will be able to view your Mutual Funds and SGBs.

**Mutual Funds**

**On the top** you will see the overall performance of your mutual fund investments, including overall gains and losses, invested value, current market value and days gains or losses.

**Gains and losses** are in both absolute and percentage terms.

**SGBs or Sovereign Gold Bonds**

Similarly, you can see the overall performance of SGBs in the SGB section of the portfolio. This includes the invested value and the overall gains/losses in that particular asset class (including both primary and secondary investments).

**How to Hide Your Portfolio Information?**

You can get an option on your Portfolio page to hide and then unhide all the critical information via a single click. This option will be available on the summary card on your Homepage as well.

When you click the hide eye icon in the dark box to hide the information, the following information will be represented with \*\*\*\*\*.

**On the Summary card**, Invested Value, Market Value, Absolute value of unrealised gains/losses (though the percentage change will be visible)

**Absolute value of daily gains/losses** (though the percentage change will be visible)

**On the Scrip level**, all the above data will be hidden, as well as the quantity of assets held (quantity hidden by 3 asterisks \*\*\* instead of 5). Also, the assets LTP (i.e. Last Traded Price) and percentage changes in both LTP and Unrealised Gain/Loss will be visible.

**On Holding details**, all the aforementioned data will be hidden, as well as the absolute values of realised gains/losses. However, the percentage value of the realised gains/losses will still be visible.

Similarly, you can hide all the information on your Portfolio Analyser by clicking on the hide eye icon.

**Figure:** Hidden information on the Portfolio Analyser

Of course, you can easily click on the unhide button to open up the hidden information. Hiding your details from the home page will also hide those details in the Portfolio page as well and vice versa.

Even while downloading the portfolio, you will be given the choice to download a masked portfolio, whereby the above information will be masked, one of my stock is showing as inactive, how to activate it

I Like Hey @rajmaha2023 Can you please share the screenshot along with your Client ID?

2 Likes

Summary

4 Likes

Summary

Yesterday, I bought it at CMP 3842.00, today the CMP shows as 1916, How is it possible. Also the stock is inactive in portal

2 Likes

Hi @rajmaha2023 - HAL stock has been split today. That is the reason CMP has become half. Your portfolio should be updated within a few working days. You should see double the number of stocks at half price after that update.

Know more about the stock split here - What Is Stock Split: Why Companies Split Their Stocks | Angel One

2 Likes

Hi I have invested on Sword Edge company shares but its showing as inactive stocks, please help me to convert it to Active stock

Hi @panjurl welcome to the community!

For us to escalate this, we request you to fill out this form with all your details update here once submitted. Form Filled and sent

Angelone 1 Like

22574637 Ticket also Raised. Alright, hope youve added the ticket number in the form, will help in escalation. Hi, I bought 50000 shares from filatex Fashion but its showing as settled

Quantity 6135 and unsettled Quantity 43865.

Now I can sell only 6135 Shares. Remaining shares when I can sell, how to convert unsettled Quantity to settled Quantity.

Waiting for your valuable response.

@panjurl The shares that are currently showing as unsettled will be settled on Trading day + 2 days. So, you will be able to sell the remaining 43,865 shares after the settlement is completed. There is no direct way to convert unsettled quantity to settled quantity; it will automatically be updated in your account once the settlement process is done.

I bought shares of OIVL Ltd on 15th Feb and now it is showing shares inactive, so how can I sell the shares?

1 Like

Hi @Krishna612 @saurabhsoni1412 we apologise for the inconvenience. Request you both to raise this issue here and fill out all your details and a screenshot if possible.

Please update here once youve submitted the form.

Thanks! Open Free Demat Account

Join our 3 Cr+ happy customers

4.4 Cr+ DOWNLOADS

Get the link to download the App

Ah, the age-old question: to buy or to sell? Well, my friend, it seems the selling bug has bitten you. Maybe you've spotted a shiny new investment opportunity, or perhaps your goldfish needs a bigger bowl (hey, priorities!). Whatever the reason, you're here to learn how to shed those shares in your Angel Broking portfolio faster than a toddler ditches broccoli.

Fear not, fearless seller! This guide will be your Yoda (or should we say, YODA shares? Okay, I'll stop with the puns... for now).

**Step 1: Gearing Up for the Great Sell-Off** (cue dramatic music)

Before you go all Edward Scissorhands on your portfolio, there's a tiny little detail: verification. You see, Angel Broking wants to make sure it's really you selling, not some rogue squirrel with a knack for online trading (although, that would be an impressive squirrel).

Here's your action plan: Log in to the Angel Broking app or website. Because, duh, gotta get in there! Look for the "Verify to Sell" button. It might be hiding under a rock, disguised as a secret agent, but it's there. Click on that bad boy. Enter your TPIN and the OTP that Angel Broking sends to your registered mobile number or email. Remember: This verification is usually valid for a day, so you don't have to enter it every single time you sell (unless you're that forgetful friend who always needs reminding about their birthday). Congrats! You've conquered the verification dragon! Now, let's get down to the real business of selling.

**Step 2: The Selling Spree** (cue shopping montage music)

Now that you're all verified and ready to roll, it's time to find those shares you're itching to ditch. Head over to your portfolio section. This is where all your lovely (or not-so-lovely) shares are chilling out. Spot the stock you want to sell. Think of it like picking out a slightly-wilted tomato at the grocery store. Click on that soon-to-be-ex-share. Look for the glorious "Sell" button. Because, well, that's what we're here for, right? **Step 3: Order Up!** (But Maybe Not the Spicy Fries)

Here's where things get a little fancy. You get to decide how you want to sell your shares. There are two main options: **Market Order**: This is the "I-want-out-NOW!" option. You tell Angel Broking to sell your shares at the current market price, whatever that may be. Think of it as a garage sale - you get what you get, and you don't get upset. **Limit Order**: This is the more strategic option. You set a specific price at which you want to sell your shares. Basically, you're telling Angel Broking, "Hold on a sec, I'm not selling unless I get at least [insert desired price here] per share."

Think about your goals: Do you need the money ASAP, or are you willing to wait for a better price? Choose your order type wisely, grasshopper.

**Step 4: The Big Shebang** (or Not-So-Big Shebang, Depending on How Many Shares You're Selling)

Enter the quantity of shares you want to sell. Don't go overboard and accidentally sell your entire stock portfolio to fund a weekend getaway to Bali (unless that's what you truly desire). Choose your order type (market or limit). Refer to Step 3 for a refresher. Review everything carefully. Double-check the number of shares, the order type, and the price (if applicable). You wouldn't want to accidentally sell your retirement fund to buy a bag of gummy bears (not that there's anything wrong with gummy bears...). Hit that glorious "Sell" button! And there you have it! You've successfully sold your shares on Angel Broking! Now, go forth and celebrate (responsibly, of course). Maybe buy yourself that goldfish bowl you've been eyeing.

P.S. Remember, this is just a light-hearted guide. For more in-depth information, always refer to Angel Broking's official resources or consult with a financial advisor. Happy selling!

Click the Stock you are interested in to open the BUY/SELL Menu

Click Buy and Select the Product Type. We offer you 3 different Product Types: Delivery For Orders where you want to hold the stock for a longer investment period

**Intraday For Orders** where you wish to Buy & Sell within the same Trading Day

**Margin For Orders** where you would like to opt for our Margin Trading Facility (MTF). If you have submitted your Physical Power of Attorney (POA): Select the stock you wish to Sell. Enter the Qty & Select the Product Type. Confirm Sell to complete your Order

If you haven't submitted your POA: Select the stock you wish to Sell. Enter the Qty & Select the Product Type. You will be prompted to Authorize the transaction

Once you agree, you will be redirected to CDSL's website

Here you need to enter both Your TPIN and Unique OTP from CDSL sent to your registered mobile number & email

id Click **VERIFY** to complete the authorization and proceed with your Sell Order

TPIN is a password generated by CDSL for those customers who do not have a POA (Power of Attorney) but want to trade. If you don't have a TPIN: Select Regenerate TPIN as the option on the pop-up for CDSL authorization. You will receive the CDSL TPIN on your registered mobile number and email address

**Read more on CDSL Dual Verification for Sell Transactions**

**Helps avoid excessive losses**

**Preserves profit** from market movements.

Designed to buy or sell a security once it reaches a pre-determined trigger price. Use our Robo Orders to book profits

You can set your target and limit your loss in one trade

**Good till Triggered (GTT)** orders allow you to buy and sell stocks at the desired price. When the trigger condition set by you is met; a limit order will be released to the exchange for execution. Click Orders from the menu at the bottom of your screen to open the Order Book. See Pending Orders, Executed & Rejected Orders as well as Positions. Tap on any position for more details. Add convenience to your trading with our Multiselect feature. Now exit multiple positions together.

Angel Broking is an Indian Stock Broking firm that was established in the year 1996. This company is known for offering financial services that include online stock broking, commodity trading, depository services, and advisory services. It is also a member of the Bombay Stock Exchange Limited, National Commodity and Derivative Exchange limited, and Multi commodity exchange of India limited. This company has more than 8500 sub-brokers and other franchisee outlets available in more than 900 cities across India. Before we proceed, please note: "ANGEL BROKING IS NOW ANGEL ONE" This platform was established in the year 1987 and the company is known for offering all these complete financial services. Here, you can easily open your Free Demat account with Angel Broking. They also started portfolio management services, IPOs business, and Mutual Funds Distribution in the year 2006. It is one of the leading stockbroking and wealth management firms that are serving clients PAN India with an efficiency of an established start-up. They also offer an extensive range of financial solutions using hi-tech tools. If you want to know how to invest with Angel broking then you can also learn the basics of trading. Some products offered by Angel Broking are Angel Speedpro, Angel Trade, and AngelTrade swift. All these products are high-end and have different usage. For example, Angel Swift has a trading app for all devices. To open a new account with angel broking use angel one coupon code to get you account for FREE today. This is not the limit, we do also offer uptoxx coupon code so that you can also use an alternate to angel one while trading and investing. How to Close Angel One accountIf you want to save your maintenance charges, then it is recommended to close all your inactive and zero balance Demat account. We know that it is a daunting task to close an account when you compare it to an account opening. This is because when you open an account, it is quite possible that stockbrokers might call you hundred times in a day so that you can have one meeting with them. But, when you make a decision to close an account or need to sign a document then you will need to visit the branch personally. If you also have uptoxx account and seeking help on how to close uptoxx account, here is the read for you. One can close their Demat account according to their convenience. For closing the account, customers have to download an Account closure form from the website under an "Important Document" section. Now, you will have to fill in all the details in the account closure form and submit it to your Angel branch. If you want to know details regarding the debit and credit card of your account then you can contact your registered branch. You can also check the same from your back office login as well. Before you move on to closing your Angel One account, keep these points in mind

First of all, there should not be any shares available in your Demat account.

Next, no negative cash balance must be available.

You need to submit the unused delivery instruction booklet to slip back to DP.

Also read: How To Get Instant Loan?

As soon as these formalities are done correctly, you will have to courier that form or visit your nearest branch. Generally, the closing procedure takes 3-5 days after you submit your form.

Things to Keep in Mind While Closing AngelBroking Account

You will not be able to close an account by making an online request via email or without submitting a physical request for account closure.

For the joint account, the account closure form must be signed by all the holders.

One needs to mention all the necessary details on the account closure form.

You cannot close your Demat account without transferring your shares to another Demat account or without selling it.

At first, you must be clear about all your debits in segments. Then only submit your closure request.

You cannot close your Angel One account online, via email, or on any call. You will have to submit a signed paper form if you want to close an account.

Is Angel One Demat Account FREE?

Whether it be a trading account or a Demat account, both of them have certain charges i.e. account opening and AMC. Here, you are provided with a Demat trading account free for opening charges, but later on, you will have to pay Demat AMC of Rs 450 per annum. Is AMC being imposed on Angel One Demat? AMC or Account maintenance charge is levied on the Demat account on Angel One along with the account opening charges. However, a stockbroker does not keep the charges fixed which means the AMC you need to pay here is Ts 450 or the company might charge nil in some cases. Is Angel One Demat Account Reliable? Of course, it is one of the top market players that you will find online and provide full access to broker services at a rate of a discount broker. Here, it also offers a bundle of features via all the online platforms.

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**How to exit equity portfolio in angel broking. Exit position angel broking. How to exit portfolio in angel broking in telugu. How to sell shares from portfolio in angel broking.**

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