

**Prabhudas
Lilladher**
POWERING YOUR FINANCIAL GROWTH



US MARKETS INVESTING WITH PL Vested

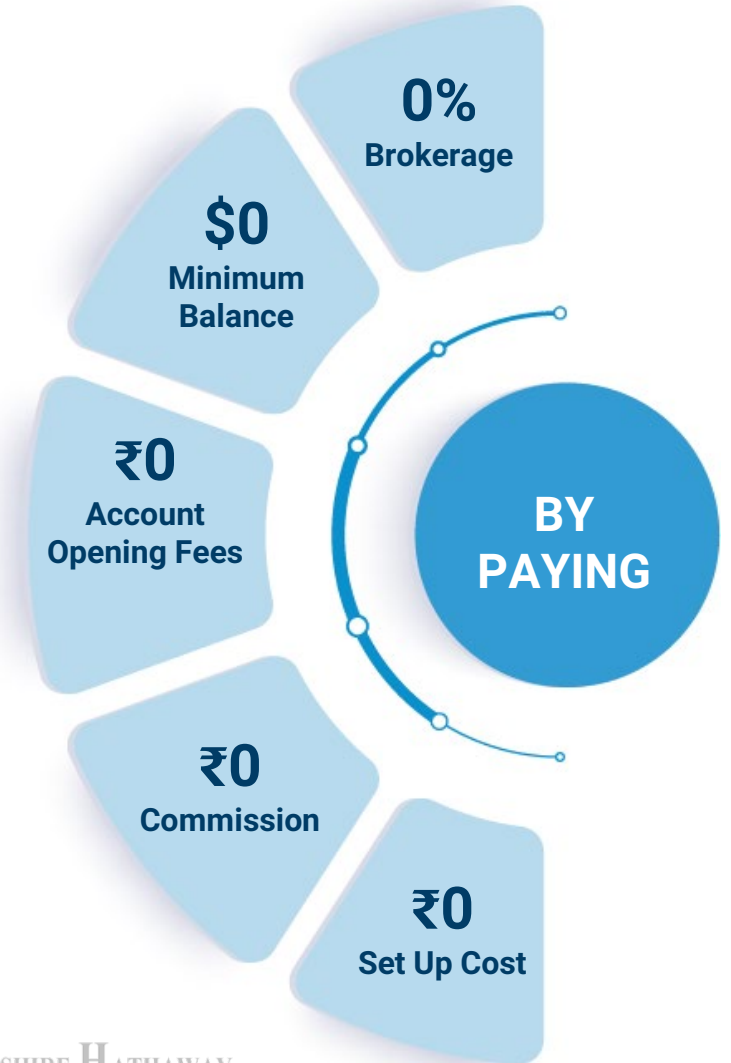


EXCHANGE

What is PL – Vested?

PL Vested is an online platform for seamless investments in the US Markets across different asset classes including US Stocks, Exchanged Traded Funds (ETFs) and Readymade Portfolios (known as Vests).

For the first time in India, you can buy fractional shares (less than 1 full share) of your favorite American Companies & ETFs.



01



FRACTIONAL SHARES:

No need to buy One full Share, you can own just \$5 of your favorite companies like Amazon, Tesla, Apple, Netflix, Google, Microsoft which are worth hundreds of dollars.

02



DOLLAR ASSETS & FOREX GAINS:

Invest outside India to create a dollar income and benefit from capital appreciation of American stocks along with forex gains from currency appreciation.

03



CONVENIENT, SEAMLESS & DIRECT INTERNATIONAL INVESTING:

PL-Vested gives you a cutting edge and seamless multiplatform technology solution to directly invest and own American companies.

04



LOWEST COST SOLUTION WITH NO UPFRONT COST AND SIMPLE CLEAR COST STRUCTURE:

We have no upfront costs, no processing costs, no minimum balance, no account opening fees and no brokerage, Period! We provide a simple, clear and transparent cost structure. It's the lowest cost solution currently in the market for direct international investing.

05



BE A PART OF THE TECHNOLOGY REVOLUTION :

You can now invest in Global Brands that you know, use and relate to. By investing in companies that are world leaders in terms of innovation & technology (like the famous FAANG), diversify your portfolio beyond the investment opportunities available in India.

Why PL Vested?

0

- Brokerage
- Commission
- Account Opening Fees
- Minimum Balance
- Minimum Fees
- Set Up Cost
- AMC and other charges



Dedicated Relationship Manager



Seamless Online Execution



Tiered Pricing Structure as % of AUM



Simple Onboarding process



Technical Advisory



Fractional Investing (Buy less than 1 full shares)



Readymade Curated Portfolios



Transparent Reporting



Product Basket includes U.S. Stocks, Exchanged Traded Funds (ETFs) and Vests



Vanguard S&P 500 ETF, PowerShares QQQ, Google, Facebook, Amazon



S&P 500 Vanguard ETF (VOO)

Sector Breakdown



- Technology: 21.10%
- Financial Services: 15.05%
- Healthcare: 14.19%
- Communication Services: 10.72%
- Consumer Cyclical: 9.77%
- All Others: 29.17%

PowerShares QQQ

Sector Breakdown



- Technology: 43.91%
- Communication Services: 20.67%
- Consumer Cyclical: 15.30%
- Healthcare: 8.30%
- Consumer Defensive: 5.94%
- All Others: 5.88%

S&P 500 ETF Trust SPDR (SPY)

Sector Breakdown



- Technology: 21.85%
- Healthcare: 15.14%
- Financial Services: 14.53%
- Communication Services: 10.73%
- Consumer Cyclical: 9.37%
- All Others: 28.38%

Select A Plan That Suits You Best!

	Basic	Premium
Subscription Charges p.a.	₹ 0.00	₹ 9,999.00
AUM Fees p.a. (%)	0.5% p.a.	0% p.a.
Brokerage Account		
Account Opening Fee (one –time)	FREE	FREE
Brokerage (%)	0%	0%
Fund Transfers		
Deposit Fee	As per Bank	As per Bank
Withdrawal Fee	\$11/withdrawal	\$11/withdrawal
Free withdrawals	0	1/year
Vests Charges		
Vest Purchasing Fee	FREE	FREE

- Access to 1500+ stocks and ETFs.
- Access to Multi-Asset Class Portfolio and Theme-Based Portfolios.
- Single login for both Indian and international Investing account.
- Both PL and Non-PL Clients can invest.
- Invest in Fractional Shares.
- Access to Technical Advisory Reports by experienced research desk.
- Multi-channel customer support.
- Access to Unlimited Transactions.



U.S. REGULATIONS

- Vested is registered as an Investment Adviser with the SEC*

VESTED FINANCE INC. (CRD# 299272 / SEC# 801-114441)

Alternate Names: VESTED, VESTED FINANCE INC.

[View latest Form ADV filed](#)

[Part 2 Brochures](#)

The adviser's **REGISTRATION** status is listed below.

REGISTRATION STATUS

SEC / JURISDICTION	REGISTRATION STATUS	EFFECTIVE DATE
SEC	Approved	12/13/2018

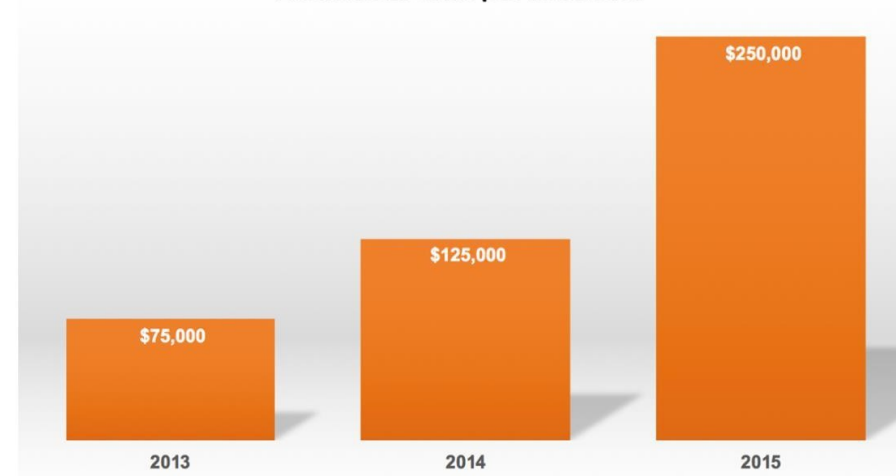
*Registration of an investment adviser does not imply any specific level of skill or training and does not constitute an endorsement of the firm by the Commission.



INDIA REGULATIONS

- The RBI's Liberalized Remittance Scheme allows each Indian resident to invest up to \$250,000 annually

LRS Annual Limit per individual



NO CAPITAL GAIN TAXES PAYABLE IN THE U.S.

CAPITAL GAIN TAXES INDIA

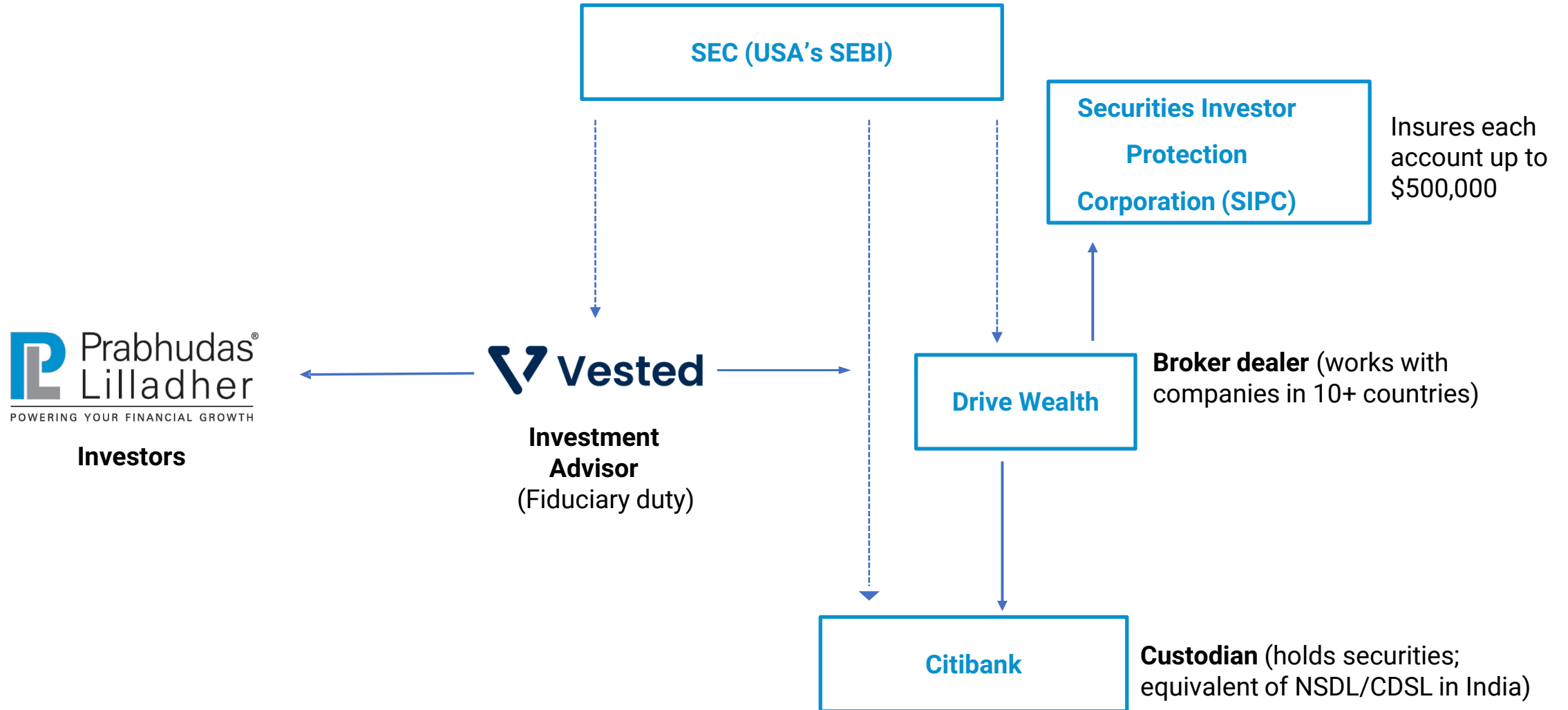
- Long-term: 2 years, 20% and indexation benefit
- Short-term: According to income tax slab

DIVIDENDS TAX

- 25% tax deducted at source in the US
- Foreign tax credit available in India (Double Tax Avoidance Agreement)

VESTED HELPS SIMPLIFY THE TAX FILING

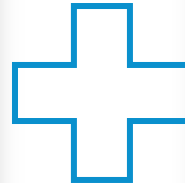






Vested is a US Securities and Exchange Commission Registered Investment Adviser. You can view our registration <https://adviserinfo.sec.gov/firm/summary/299272>

We have partnered with DriveWealth, LLC that is a member of FINRA, SIPC and uses custodian services provided by Citibank.



Powering Financial Growth for nearly 8 decades, Prabhudas Lilladher is one of Asia's most admired and India's most trusted brands since 1944.

We are a Research-driven, full-stack Financial services provider spread over 150+ cities with over 1300+ centres including branches and progress partners catering to clients all over India and globally.

In line with our unwavering focus on innovation and customer delight, we introduce to you PL Vested - a platform which provides our clients the opportunity of investing directly in US Markets.

Existing PL Clients

Login with credentials
(PL Client ID and password)

Complete Short KYC
(2 documents required: proof of
ID & proof of address)

KYC Approval
(takes 1-3 business days)

Non - PL Clients (Login via client ID and password)

**Create an account in PL to
generate credentials**
(<https://instakyc.plindia.com>)

Login using credentials

Complete short KYC
(2 documents required: proof of
ID & proof of address)

KYC Approval
(takes 1-3 business days)

Non - PL Clients (Login via Phone number and OTP)

Login to Guest Tab

Enter phone number to verify

Not yet registered, register as Guest

Enter full name, email ID, phone number & OTP

Complete short KYC
(2 documents required: proof of ID & proof of
address)

KYC Approval
(takes 1-3 business days)

Simple Funding Process



Fund online



Fund in person with bank visit



For further details you may visit



Visit: <https://pl.vested.co.in/>

Mail: plvested@plindia.com

Contact: 9819577898 (Nandita Relia)