

**PROJECT-REPORT ON**  
**“A STUDY ON CLIENT RELATIONSHIP AND PORTFOLIO MANAGEMENT OF**  
**MOTILAL OSWAL’s”**

**Submitted by**

**MR.SAPAN**

**USN: 4AL22BA084**

**Submitted to:**



**VISVESVARAYA TECHNOLOGICAL UNIVERSITY, BELGAVI**

**In partial fulfilment of the requirements for the award of Degree**

**MASTER OF BUSINESS ADMINISTRATION**

**Under the guidance of**

**INTERNAL GUIDE**

**Dr.Catherine Nirmala David**

**Professor**

**AIET, Mijar**

**EXTERNAL GUIDE**

**Ms. Nishitha**

**HR**

**MOTILAL OSWAL’s**



**PG DEPARTMENT OF BUSINESS ADMINISTRATION ALVA'S**  
**INSTITUTE OF ENGINEERING AND TECHNOLOGY,SHOBHAVANA**  
**CAMPUS, MIJAR MOODBIDRI**

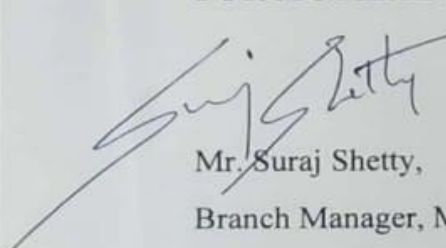
## TO WHOMSOEVER IT MAY CONCERN

This is to certify that Mr. Sapan (USN 4AL22BA084), student form Alva's Institute of Engineering & Technology, Mijar, has successfully completed his **"Finance Based"** project from 23 April 2024 to 6 June 2024.

During the period of his assignment, we found him sincere and a keen learner.

We wish him all the best in future endeavors.

**FOR MOTILAL OSWAL FINANCIAL SERVICES LTD.**

  
Mr. Suraj Shetty,  
Branch Manager, Mangalore





# ALVA'S INSTITUTE OF ENGINEERING & TECHNOLOGY

(A Unit of Alva's Education Foundation @ Moodbidri)

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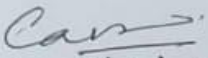
Approved by AICTE, New Delhi & Recognised by Government of Karnataka

Accredited by NBA (CSE & ECE)

Date: 09/09/2024

## CERTIFICATE

This is to certify that **Sapan** bearing **USN 4AL22BA084**, is a bonafide student of Master of Business Administration course of Alva's Institute of Engineering and Technology, Moodbidri, for the batch 2022-2024, affiliated to Visvesvaraya Technological University, Belagavi. The Project report on "**A Study on Client Relationship and Portfolio management of Motilal Oswal**", is prepared by him under the guidance of Dr. Catherine Nirmala, Professor, in partial fulfilment of the requirements for the award of the degree of Master of Business Administration of Visvesvaraya Technological University, Belagavi Karnataka.

  
Signature of Internal Guide

Viva – Voce Examination

  
Signature of HOD  
HOD  
PG Dept. of Business Administration  
Alva's Institute of Engg. & Technology  
Mijar - 574225

  
Signature of Principal  
Principal  
Alva's Institute of Engg. & Technology,  
Mijar - MOODBIDRI - 574 225, D.K.

Signature of Internal Examiner  
(Name & Affiliation)

Signature of External Examiner  
(Name & Affiliation)

## DECLARATION

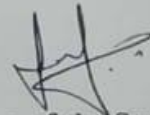
I **SAPAN**, bearing **USN 4AL22BA084** hereby declares that the Project Title entitled "**A Study Client Relationship and Portfolio Management**" prepared by me under the guidance of **Dr. Catherine Nirmala David**, faculty of MBA Department, Alva's Institute of Engineering and Technology and External Guidance by **Ms.Nishitha**

I also declare that this Project is towards the partial fulfilment of the University regulations for the award of degree of Master of Business Administration by Visvesvaraya Technological University Belagavi.

I have undergone a summer Project for period of six weeks. I further declare that this Project is based on the original study undertaken by me and has not been submitted for the award of any degree/diploma from any other University/Institution.

**Place:** **MIJAR**

**Date:** **10.09.2024**



**Signature of the Student**

**SAPAN**

**(4AL22BA084)**

## ACKNOWLEDGEMENT

I would like to take this opportunity to express my sincere gratitude to all those who have helped me throughout this Project. It gives me immense pleasure to acknowledge all those who have encouraged and supported for the successful completion of this work.

I would like to express my sincere thanks to Principal **Dr. Peter Fernandes**, AIET, Moodbidri. And I express my deep sense of gratitude to my Internal Guide **Dr. Catherine Nirmala David**, Professor of MBA Department, for the constant support and encouragement to carry out my report successful without much difficulty. I express my heartfelt thanks for their constant encouragement and support during the entire report.

My profound thanks to **Ms. Nishitha**, who took interest in explaining concepts and imparting necessary inputs pertaining to the Project work, without which it would not have been possible for me to complete this work. I am also very thankful to other executives and staff of the company for their co-operation.

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Finally, I thank my friends for their valuable suggestions offered to me to complete this study successfully.

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## **EXECUTIVE SUMMARY**

The project titled “A Study on client relationship and portfolio management of Motilal Oswal’s” was carried out over a six-week period. This report is structured into five chapters. The first chapter provides an introduction and a historical overview of Motilal Oswal’s. The second chapter presents the conceptual framework and a literature review related to the subject of the study. The third chapter outlines the research design, detailing the statement of the problem, the need for the study, objectives, scope, research methodology, and the limitations encountered during the research process. The fourth chapter delves into the analysis and interpretation of the data collected from the company, primarily utilizing balance sheets, tables, and graphical representations for clarity. The fifth and final chapter concludes the study with key findings, conclusions, and suggestions based on the research. The report concludes with a bibliography listing the websites and sources used to gather secondary data and conduct the literature review. The annexure includes the balance sheet and profit and loss account of Motilal Oswal.