



# Bonanza Portfolio Limited

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## Message from the CEO

### Mr. Shiv Kumar Goel

In view of robust growth of the Indian economy over the past few years, it is expected that there will be tremendous growth opportunities for the Indian financial markets. Retail penetration is very low in India in comparison with other developed economies. Only 3% of the country's population invests in stocks, mainly due to lack of awareness, infrastructure and high distribution costs. However, currently the scenario is expected to change with the help of large network of broking houses which are providing all financial products under one roof, and the retail investors are willing to join the stream.

The broking industry in the past few years has emerged as a full-fledged financial services industry by providing investors one stop service like trading in shares, commodities, PMS, depository services, distribution of financial products like mutual fund, insurance, real estate funds, besides providing advisory and research on economy/sectors/ companies. We believe that in future there will be huge growth opportunity available for big pan Indian players which are well equipped with the latest technology and vast distribution network.



## D&B D-U-N-S® 91-657-1966

Business Activity	
Broking Services	
Key Information (As on Mar 2007)	
Operations	
Total Income (Rs mn)	622.9
Net Profit (Rs mn)	66.1
Employees	1,126
Branches	475
No of Cities Covered	162
Reach & Access	
Clients Served	Retail, HNI, Corporate
Industry / Verticals	Services, Retail
Management	
Directors	
Shiv Kumar Goel	
S P Goel	
Anand Prakash Goel	
Vishnu Kumar Agarwal	
SK Goel	
Renu Goel	
Chief operating officer	
Saurabh Shukla	

## About the company

Bonanza Portfolio Ltd (Bonanza), a public limited company was established in the year 1993. It is a flagship company of the Bonanza Group. The company is primarily engaged in broking services.

## Group Entities

The Bonanza group includes Bonanza Portfolio Ltd, Bonanza Global DMCC, Dubai, Bonanza Commodity Brokers Pvt Ltd, Bonanza Insurance Brokers Pvt Ltd, Bonanza Online.com Ltd and Sunglow Fin Invest Pvt Ltd.

## Major Offerings

### Trading in Equities and Derivatives

Bonanza has memberships of all the leading stock exchanges in India and is a registered as clearing cum trading member on cash and derivatives segment of NSE and BSE. Bonanza is also registered as dealer on OTCEI. Bonanza through its wide network of offices, offer various capital market related services to large retail customer base spread across India. Further, Bonanza has been felicitated as leading volume driver on BSE, during the FY05 and FY07 ( CM/F&O)

### Trading in Commodities

The company is a registered trading and clearing member of NCDEX, MCX and NMCE. The company also provides investment opportunities in gulf commodities futures and currency market through its membership in DGEX.

### Depository Services

Bonanza is a depository participant of

CDSL and NSDL for both equity and commodity segment. It offers a range of services including demat operations.

## Mutual Funds & IPO's

Bonanza is one of the largest distributors of mutual funds in India. It has an online portal providing regular updates on NFOs, forthcoming IPOs, MF gainers and losers and daily NAV's. It helps its clients with best research reports known in the market in comparative analysis of several mutual fund schemes. Bonanza offers transaction alerts via mobile text messages and portfolio statements through Auto mail facility. The company also allows investors to apply for mutual funds and IPOs through online investment platform.

## Portfolio Management

Bonanza has a team of dedicated and experienced portfolio managers who respond to the changes in rallies, patterns and move stocks accordingly to capitalise on market situations.

Following are some of the features of Bonanza fund management services:

- Professional research
- Proactive management
- Prudent risk management practices
- Greater flexibility to hold cash and allocate Investments

It offers several benefits including portfolio advisory services and structured trading products with innovative ideas and strategic investments.

### Online Trading

Bonanza offers easier and secure online trading experience. Its online trading portal enables trading across all exchanges and access to all services in a single window. *Bonanza Value* and *Bonanza Max* are two of its unique and personalised softwares for online trading.

*Bonanza Value* is a web interface that caters to investors trading occasionally. It is a comprehensive trading module providing fundamentals to trading, demos, quotes, demat & digital contracts, integrated banking, instant transfer and price alerts. *Bonanza Max* is an EXE based desktop software designed for traders who take advantage of short term price movements. It has technical analysis features helping client to time the markets.

### Insurance

Bonanza covers a wide range of insurance solutions both in life insurance as well as general insurance. The IRDA certified advisors offer sensible advice on policy selection and assist you through out the claims redressal process. The advisory team carefully matches the Insurance Products available to your personal and financial profiles and then offers you suitable solution options.

### Arbitrage

The specialized alternative investments desk offers differentiated research and execution services on arbitrage. With the help of its specialized quantitative research desk, Bonanza creates insightful data points creating investment and arbitrage opportunities. To strengthen the arbitrage services, the company

plans to appoint 100 arbitrageurs and have a pan India presence for arbitrage.

### Currency Futures

Bonanza is amongst the few to offer currency futures trading. The company has installed dedicated resources in terms of trained manpower and advisors to help and guide actual users on hedging techniques and strategies.

### Research

Bonanza Research Desk has a dedicated team of analysts and experts that have an in-depth knowledge of the market. They offer value perspectives, focus on opportunities for investment and growth and endeavor to reduce risk potential.

Its premium advisory services are based on technical and fundamental views and strategies in both equity and commodity segments. They provide trading ideas, daily market strategies, monthly updates, investment ideas, trading calls and commodity views to its clients.

### Reach & Access

As of FY08, Bonanza has established a pan India network of 874 branches covering over 300 cities. Bonanza Global DMCC member of DGCX is its group company operating from UAE.

### Technology & Connectivity

Bonanza has entered into strategic tie ups with companies that provide latest technological support to facilitate trading access and direct processing activities which helps its clients to trade either online or offline. Bonanza's trading

platform is supported by Financial Technology and Asian CERC Information. The back office support is provided by Apex Softcell Pvt Ltd.

### Performance

During 2008, Bonanza added nearly 60,000 clients in equity segment. The company's offices across the country increased from 475 in 2007 to 874 in 2008. Total revenue increased by more than 100% whereas profits increased by more than 250% in FY08.

### Future Plans

Bonanza aims at acquiring significant market share in the equity, commodity and insurance distribution segment in India. It further aims at expanding FII and institutional client base, enhancing its research capabilities to meet international standards.



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