



## Diversified Global Portfolios of renowned international portfolio managers



# Step 1: Login to your India INXGA trading terminal. Scroll down on home page. In your dashboard click on 'Open Interactive Advisors Account'.

S&P 500 4329.36 ▲ 0.01%    NASDAQ Comp 13316.10 ▲ 0.02%    RUSSELL 1000 2390.39 ▲ 0.00%    ...    Help ? | 

 Symbol or Site Search   **Trade**

Home    Portfolio    Watchlist    Trade    Markets    Discover    PortfolioAnalyst    Reports    Transfer & Pay

## Your Dashboard [Add/Edit Widgets](#)

### For You

You are all caught up. Check back tomorrow.

### Interactive Advisors

China Sector  
Global X



Technology  
Crabtree Asset Management



Tactical Adaptive  
Stoken Asset Management



**Open Interactive Advisors Account**

### Market Overview

BRIEFING.COM MARKET UPDATE  
**Early Levels**

S&P futures vs fair value: -60.50. Nasdaq futures vs fair value: -210.80.

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Rank : positive

[Read more](#)

### Top Portfolio Positions

SYMBOL	MKT VALUE	LAST	CHANGE
--------	-----------	------	--------

### Watchlist My watchlist

SYMBOL	LAST	CHANGE
--------	------	--------



## Step 2: Type your name to sign the agreement. Click on Submit.

S&P 500 4329.36 ▲ 0.01%

INDIA INX  
INDIA INX  
INDIA INX

Home Portfolio

Your Dashboard

For You

You are all caught up. Check back soon.

Trade

Add/Edit Widgets

50. Nasdaq futures vs fair

om

Top Portfolio Positions

By typing your name and clicking submit you confirm that you accept these disclosures and agreements.

**InteractiveAdvisors**

Our mission is to make investing easy, transparent and simple. You can invest in dozens of managed portfolios with just a \$100 minimum.

Open an Interactive Advisors account today. It's easy and quick.

Review and sign disclosures and agreements to get started investing today

Important Disclosures and Agreements

**Signature** – Type your name(s) exactly as it appears on your account

████████████████████

Type Your Name Here

Submit

SYMBOL | MKT VALUE | LAST | CHANGE | SYMBOL | LAST | CHANGE

## Step 3: Your interactive advisor's dashboard will be open in a new tab.

The dashboard is titled "INDIA INX GLOBAL ACCESS" and is powered by "InteractiveAdvisors". It includes a "Portfolio search" bar and a navigation menu with icons for home, search, portfolio, user, and education. The main content area is divided into two sections: "First steps" and "Example portfolios".

### First steps

- 1. Set your risk score**  
Take the risk questionnaire to see which portfolios are suitable for you.  
[Set risk score](#)
- 2. Make your first investment**  
Choose a portfolio and invest in it. Click on one of the examples or see them all.  
[See portfolios](#)

For new accounts, please wait till the next business day to transfer funds.  
Investing involves using the funds in your Interactive Advisors account.  
For accounts opened today, funds will only be transferred on the next business day.

### Example portfolios

Portfolio name	Performance	Min invest	Risk
Conservative WisdomTree	↓ -1.4% 365 Days	\$100	1
Fair Labor & Thriving Communities IA SRI	↑ 10.1% 365 Days	\$100	3
Small Cap Value IA Smart Beta	↑ 12.0% 365 Days	\$100	3
Energy FTSE Russell	↑ 49.0% 365 Days	\$100	4
Health Care FTSE Russell	↑ 14.0% 365 Days	\$100	3

# Step 4: Scroll down and click on transfer fund from your trading account with India INX Global Access.

The screenshot displays the India INX Global Access trading account interface. At the top left, the logo for India INX Global Access is shown, powered by Interactive Advisors. A search bar labeled "Portfolio search" is located at the top right. Below the search bar, there are three portfolio cards:

- Small Cap Value** (IA Smart Beta): +12.0% (365 Days), \$100, 3 items.
- Energy** (FTSE Russell): +49.0% (365 Days), \$100, 4 items.
- Health Care** (FTSE Russell): +14.0% (365 Days), \$100, 3 items.

Below the portfolio cards, there is a section for account valuation:

Total account valuation ⓘ	Available to invest	Available in your IB account
-	-	\$457.03

A "Transfer funds" button is located below the "Available in your IB account" value. Below the valuation table, the text "Not enough valuation data" is displayed.

On the left side of the interface, there is a vertical navigation menu with icons for Home, Search, News, Profile, and other functions. A "See portfolios" button is also visible in the top left area of the main content.

## Step 5: Click on set your risk score.

### First steps

#### 1. Set your risk score

Take the risk questionnaire to see which portfolios are suitable for you.

[Set risk score](#)

#### 2. Make your first investment

Choose a portfolio and invest in it. Click on one of the examples or see them all.

[See portfolios](#)

For new accounts, please wait till the next business day to transfer funds.

Investing involves using the funds in your Interactive Advisors account.

For accounts opened today, funds will only be transferred on the next business day.

#### Example portfolios

Portfolio name	Performance	Min invest	Risk
 <b>Small Cap Value</b> IA Smart Beta	↑ 12.0% 365 Days	\$100	3
 <b>Quality</b> IA Smart Beta	↑ 13.3% 365 Days	\$100	2
 <b>Health Care</b> FTSE Russell	↑ 14.0% 365 Days	\$100	3
 <b>China Sector</b> Global X	↓ -24.7% 365 Days	\$100	4

## Step 6: Click on 'See portfolios' to make your first investment.

The screenshot shows the India InX Global Access website interface. At the top left is the logo for India InX Global Access, powered by InteractiveAdvisors. A search bar labeled 'Portfolio search' is located at the top right. Below the search bar, a user profile is visible with a risk score of 5, labeled 'Speculative'. A navigation menu on the left includes icons for home, search, portfolio, and other features. The main content area is titled 'First steps' and contains two numbered steps: '1. Set your risk score' (with a green checkmark) and '2. Make your first investment'. The 'Set your risk score' step includes a button labeled 'Set risk score'. The 'Make your first investment' step includes a button labeled 'See portfolios'. To the right of the 'First steps' section is a table titled 'Example portfolios' with columns for Portfolio name, Performance, Min invest, and Risk. The table lists three portfolios: ESG Dividend (IA SRI) with a 13.0% increase, Thematic Disruptors (Global X) with a 21.7% decrease, and Technology (Crabtree Asset Management) with a 7.6% decrease.

INDIA INX GLOBAL ACCESS powered by InteractiveAdvisors

Portfolio search

Risk score Speculative 5

Explore this page ▶

### First steps

- 1. Set your risk score** ✓  
Take the risk questionnaire to see which portfolios are suitable for you.  
[Set risk score](#)
- 2. Make your first investment**  
Choose a portfolio and invest in it. Click on one of the examples or see them all.  
[See portfolios](#)

### Example portfolios

Portfolio name	Performance	Min invest	Risk
ESG Dividend IA SRI	↑ 13.0% 365 Days	\$100	2
Thematic Disruptors Global X	↓ -21.7% 365 Days	\$100	4
Technology Crabtree Asset Management	↓ -7.6% 365 Days	\$30,000	4

# Step 7: You have choice of more than 80 portfolios of renowned international portfolio managers.

The screenshot displays the INDIA INX Global Access website interface. At the top left, the logo for INDIA INX GLOBAL ACCESS is shown, along with the text 'powered by InteractiveAdvisors'. A search bar on the top right contains the text 'Portfolio search'. A navigation menu on the left side includes icons for home, search, and other features. The main content area features a search input field with the text 'How can I invest in...' and a dropdown menu showing suggestions: 'top performing socially responsible portfolios?', 'recently launched portfolios?', 'portfolios from leading institutions?' (highlighted), 'undervalued companies?', and 'growth?'. Below the search results, a section titled 'Portfolios from leading institutions' is displayed, with a sub-header 'Invest in portfolios created using data from industry-leading providers and our own investment team.' Two portfolio cards are shown: 'Global Growth and Income' by Franklin Templeton, which has a 3-year history, a 5.2% return over 365 days, and a Sharpe ratio of 0.68; and 'Digital Innovation' by Global X, which has a 4-year history, a -23.3% return since inception, and a Sharpe ratio of -. A green chat bubble at the bottom left contains the text 'Click for Live Chat Help'.

INDIA INX GLOBAL ACCESS powered by InteractiveAdvisors

Portfolio search

How can I invest in... **portfolios from leading institutions?**

top performing socially responsible portfolios?  
recently launched portfolios?  
undervalued companies?  
growth?

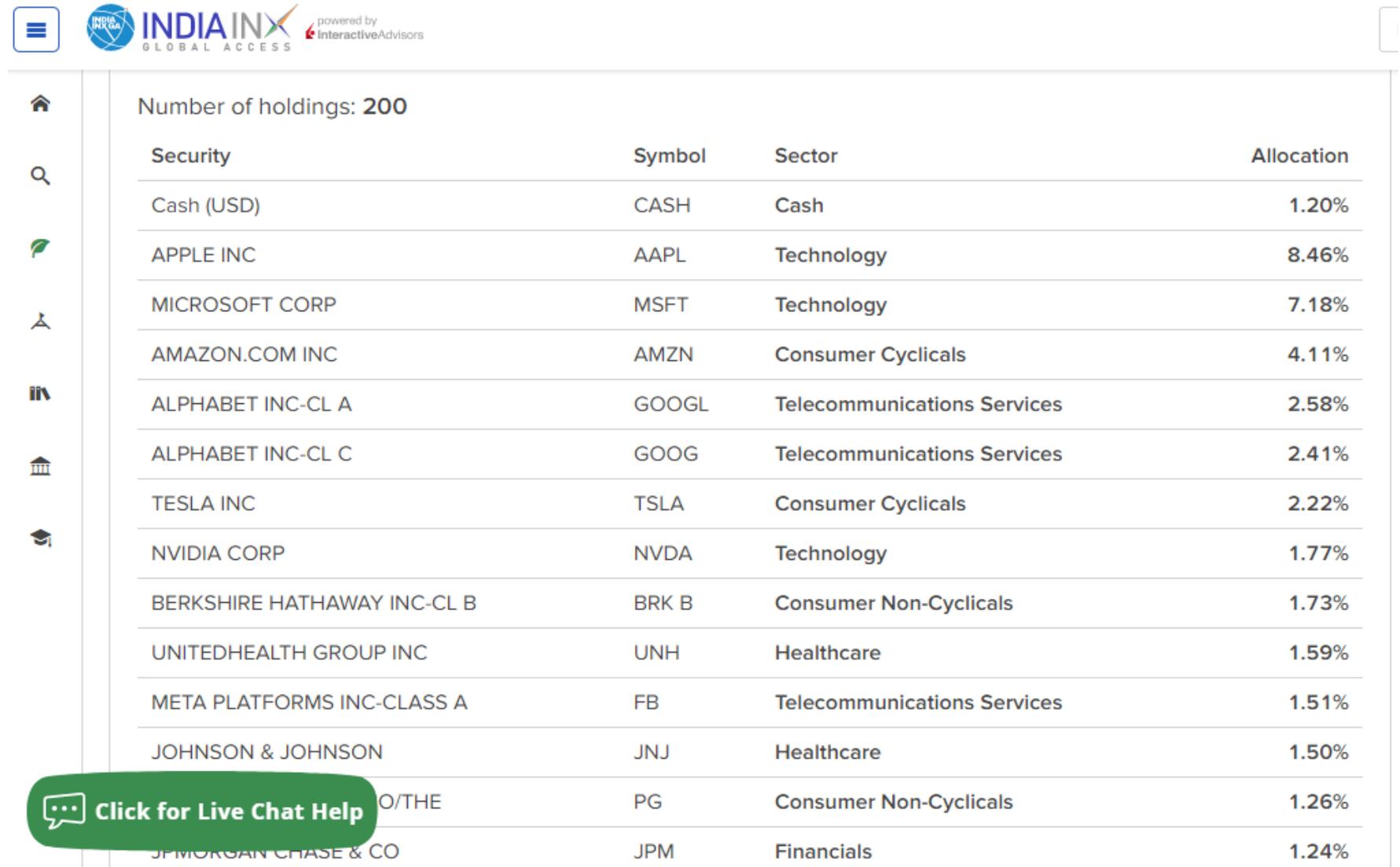
### Portfolios from leading institutions

Invest in portfolios created using data from industry-leading providers and our own investment team.

Portfolio Name	Manager	History	Return	Sharpe Ratio
Global Growth and Income	Franklin Templeton	3	↑ 5.2% 365 Days	0.68
Digital Innovation	Global X	4	↓ -23.3% Since inception	-

Click for Live Chat Help

## Step 8: You can check the further details of each portfolio like performance and holdings etc.



Number of holdings: 200

Security	Symbol	Sector	Allocation
Cash (USD)	CASH	Cash	1.20%
APPLE INC	AAPL	Technology	8.46%
MICROSOFT CORP	MSFT	Technology	7.18%
AMAZON.COM INC	AMZN	Consumer Cyclical	4.11%
ALPHABET INC-CL A	GOOGL	Telecommunications Services	2.58%
ALPHABET INC-CL C	GOOG	Telecommunications Services	2.41%
TESLA INC	TSLA	Consumer Cyclical	2.22%
NVIDIA CORP	NVDA	Technology	1.77%
BERKSHIRE HATHAWAY INC-CL B	BRK B	Consumer Non-Cyclical	1.73%
UNITEDHEALTH GROUP INC	UNH	Healthcare	1.59%
META PLATFORMS INC-CLASS A	FB	Telecommunications Services	1.51%
JOHNSON & JOHNSON	JNJ	Healthcare	1.50%
PG	PG	Consumer Non-Cyclical	1.26%
JPMORGAN CHASE & CO	JPM	Financials	1.24%

Click for Live Chat Help

## Step 9: You can check the factsheet of portfolios.

assumptions made or that all assumptions used in achieving the returns have been stated or fully considered. Performance is net of the underlying ETFs' fees and does not include strategist fees, platform fees, brokerage fees, commissions, trading costs and any other direct expenses that, if applicable, would reduce returns.

The performance presented for the model portfolio is calculated by Morningstar based on the market-based performance of the underlying ETFs that have comprised the model portfolio during the period. If the model portfolio's performance was calculated based on the NAV of the ETFs that comprise the model portfolio, the performance would be different. Refer to page 4 to see the market performance and the NAV performance of each of the ETFs that comprise the model portfolio.

The performance data quoted represents past performance of the ETFs and does not guarantee future results. Investment return and principal value of an investment will fluctuate so that an investor's shares of an ETF, when sold or redeemed, may be worth more or less than their original cost. Current performance may be higher or lower. Returns for periods greater than one year are annualized. Market price returns are based upon the midpoint of the bid/ask spread at 4:00 Eastern Time and do not represent the returns you would receive if you traded shares of any of these ETFs at other times. For performance data of the Global X ETFs current to the most recent month end, please call 1-888-493-8631, or visit [globalxetfs.com](http://globalxetfs.com).

The performance shown is compared to a benchmark. The index included in the benchmark is a broad-based securities market index. Broad-based securities indices are unmanaged and are not subject to fees and expenses typically associated with investment funds. Investments cannot be made directly in a broad-based securities index. See description of Benchmark Elements on next page.

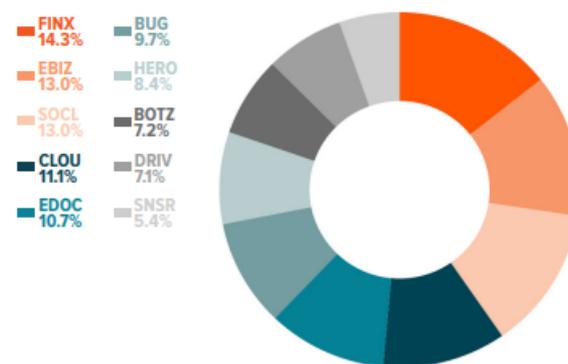
### TOP 10 COUNTRY BREAKDOWN (%)

	Portfolio	Benchmark
United States	62.0	58.2
China	10.7	5.0
Japan	7.2	5.9
South Korea	2.8	1.7
Switzerland	1.9	2.7
Canada	1.7	2.9
Brazil	1.7	0.8
United Kingdom	1.5	3.9
Australia	1.4	1.8
New Zealand	1.0	0.1

### EXPOSURE BY SECTOR (%)

	Portfolio	Benchmark
Information Technology	44.1	21.9
Communication Services	22.4	9.4
Consumer Discretionary	13.0	12.8
Health Care	10.8	11.6
Industrials	6.1	9.9
Financial Services	1.8	14.1
Materials	1.0	4.9
Real Estate	0.6	2.6
Utilities	0.1	2.6
Energy	0.1	3.4
Consumer Staples	0.0	6.9

### EQUITIES THEMATIC



## Step 9: Click on invest to make investment in diversified portfolios.

The screenshot shows a web browser window with the URL <https://account.interactiveadvisors.com/client/portfolio/351d91ko>. The page header features the INDIANX GLOBAL ACCESS logo, powered by InteractiveAdvisors, and a 'Portfolio search' bar. The main content area is titled 'Digital Innovation' and is managed by Global X. It displays the strategy as 'ETFs / Funds', a management fee of 0.60%, and a portfolio risk score of 4. A sidebar on the left contains navigation icons for home, search, portfolio, and other features. The main content area includes a 'Create investment' section with a minimum investment and addition of \$100, and an 'Invest' button. Below this is a 'Portfolio data' section with tabs for Performance, Holdings, Transactions, and Commentary. A right-hand sidebar provides an 'About Digital Innovation' section, explaining that the Global X Digital Innovation ETF Model Portfolio is designed to provide exposure to structural themes that may be disrupting various segments and sectors in the broad economy with a focus on digitalization and technological disruption. The 'Approach' section states that the portfolio's theme identification and weighting methodologies draw inspiration from EM Roger's Diffusion of Innovation Theory, in which technological adoption

INDIANX GLOBAL ACCESS powered by InteractiveAdvisors

Portfolio search

### Digital Innovation

GLOBAL X Managed by Global X

Strategy: **ETFs / Funds** • Management fee: **0.60%** ⓘ • Portfolio risk score: **4**

[Explore this page ▶](#)

**Create investment ⓘ**

Min investment Min addition  
\$100 \$100

[Invest](#)

**Portfolio data ⓘ**

[Performance](#) [Holdings](#) [Transactions](#) [Commentary](#)

#### About Digital Innovation ⓘ

The Global X Digital Innovation ETF Model Portfolio is designed to provide exposure to structural themes that may be disrupting various segments and sectors in the broad economy with a focus on digitalization and technological disruption.

#### Approach

The portfolio's theme identification and weighting methodologies draw inspiration from EM Roger's Diffusion of Innovation Theory, in which technological adoption



**Thank You**