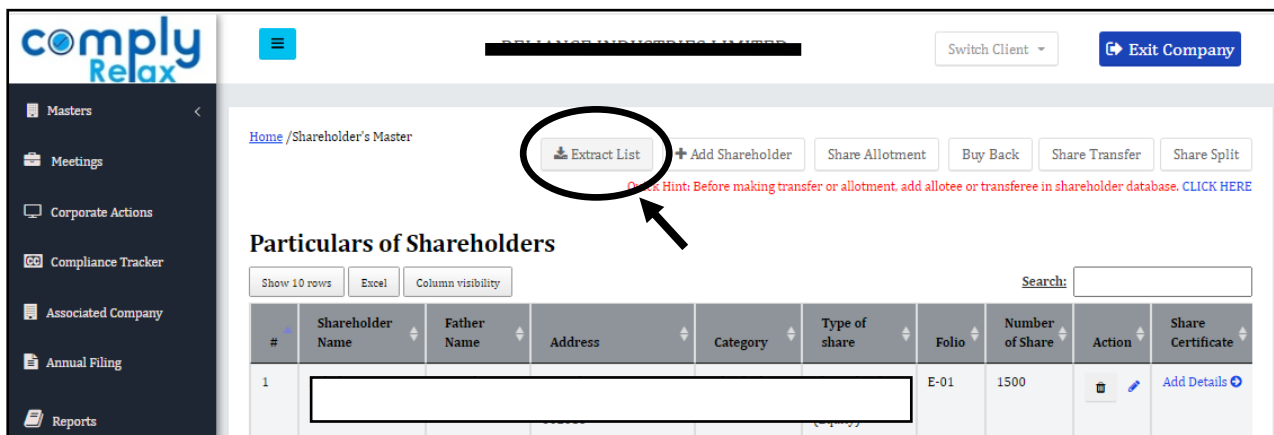


Generation of List of Shareholders for a Specific Date

Now you may generate the list of shareholders for your clients on a specific date. List will be generated as per the shareholder's data added for such client. Follow these steps to access this feature:

Option 1:

Dashboard ⇒ Clients ⇒ Select Client ⇒ Compliance Manager
 ⇒ Master ⇒ Shareholder ⇒ Extract List



Option 2:

Dashboard ⇒ Clients ⇒ Select Client ⇒ Compliance Manager
 ⇒ Reports ⇒ List of Shareholder

Both option 1 and 2 will take you to following screen:

You can generate the list from this page financial year or date wise.

