



November 21st, 2022

Corrigendum to RFP - Research (Portfolio Modeling) Advisory Services

RFP REFERENCE NUMBER: SSL/Research/2022-23/01

Date of Issue 10th November 2022

StockHolding Services Ltd (SSL) had invited bids from eligible bidders who could provide Research (Portfolio Modeling) Advisory Services.

We would like to convey changes in some points with Reference to the RFP.

1. The last date for bid submission is extended till 1st December, 2022.
2. Pg. 16 bullet 4 Price will be paid/adjusted as per applicable tax rate.
3. Pg. 7 Point 6 Payment will be done on a Monthly Basis Post services received.
4. Pg. 13 Bidder can provide Research calls as given in the RFP as well as the additional services he wishes to provide. In case of options calls only examples were provided as there is a plethora of options strategies bidder can recommend the different strategies available.
5. Institutional Report Requirement - 4 Fundamental Reports and 4 Technical Reports.
6. Pg. 13 Research Calls – The number of Delivery calls Recommendation is mentioned considering weekly basis.
7. Pg. 13 Model Portfolio – Long term, short term and medium term portfolio Average expected return consideration will be 15%, 20% and 20% per annum respectively.
8. Pg.7 Cancellation of the Order Point 7 it applies to both the parties.