
Waterfield Financial and Investment Advisors Private Limited

Direct Onboarding: Portfolio Management Services

As per the SEBI Circular on Guidelines for Portfolio Managers, dated 13 February 2020, all clients have an option to invest directly in Portfolio Management Services without the intermediation of distributors / advisors. This is effective from October 1, 2020.

For more details about the Portfolio Manager and direct onboarding option, you may refer to the Disclosure Document available on our website or get in touch with us.