

FAQs on iDirect One Click Portfolio

Q1. What is iDirect One Click Portfolio?

A1. iDirect One Click Portfolio offers you a platform to invest in baskets of stocks/ETFs at a click. You can invest, monitor and exit the portfolios any time you want at a click.

One Click Portfolio can be broadly classified into two categories – Research Recommended Portfolios and Custom Portfolios.

You can invest in One Click Portfolio by following the given path:
Login to our new website >> Equity >> iDirect One Click

Q2. What are Research Recommended Portfolios?

A2. Research Recommended Portfolios are the portfolios that have been recommended by our research after extensive analysis on quantitative and qualitative parameters. While investing in research recommended portfolios, you need to buy shares in the same ratio as suggested by our research and need to invest the minimum amount as specified by research. The minimum amount differs from Portfolio to Portfolio.

Q3. Are exit calls given on Research Recommended Portfolios?

A3. Yes, exit calls are also given on the portfolios recommended by our research team. The same is communicated to the customers through Mobile App Notification and updated in the iCLICK-2-GAIN section.

Q4. What is Custom One Click?

A4. Custom Portfolios give you the option to create your own portfolios by adding your favourite stocks in desired quantities. There is no minimum investment amount for Custom Portfolios.

Q5. How can I create my own customized portfolio? Can you specify the path?

A5. You can create your own One Click Portfolio through Custom One Click. You need to add at least 2 stocks to create a portfolio. Given below is the path:-

Log in to our new website >> Equity >> iDirect One Click >> Custom One Click

Q6. Is only lump sum investment allowed in One Click Portfolio or can I do SIPs also in One Click Portfolio?

A6. You can either invest lump sum or invest in a staggered manner by using SIP option. You can choose the frequency of SIP as monthly/quarterly or yearly as per your preference.

Q7. When does the SIP start if I choose to do SIP in a particular portfolio?

A7. You can choose the commencement date of SIPs, frequency as well as the duration of SIPs as per your preference.

Q8. Are there any extra charges levied while investing in One Click Portfolio?

A8. No extra charges are levied while investing in One Click Portfolio. This feature is available absolutely free of cost and only your respective cash brokerage rates will be applicable on your transactions.

Q9. While investing in One Click Portfolio, is the brokerage charged on the total transaction amount or is it charged per scrip?

A9. While investing in One Click Portfolio, brokerage is charged on per scrip basis rather than on the total transaction amount. For eg: if a Portfolio consists of 5 stocks, brokerage will be charged on each stock separately rather than on the entire transaction amount.

Q10. How can I monitor the portfolios I invested in?

A10. You can monitor your portfolios under "My One Click" section in iDirect One Click. The net invested amount, the current value as well as the overall gain/loss % is shown in this section.

Q11. Can I customize i.e. add or delete a particular stock from Research Recommended Portfolios?

A11. Currently, no changes are being allowed in the Research Recommended Portfolios. However, you can create your own portfolios using Custom One Click. The same is under development and very soon you will be given an option to customize the research recommended portfolios as well.

Q12. How do I exit a particular portfolio I have invested in?

A12. You can exit the particular portfolio following the below path :

Login to the New Website >> Equity >> iDirect One Click >> My One Click >> Portfolio Name >> Exit Portfolio

Q13. Can I rebalance my portfolios after investing in them?

A13. Currently, customers are not being allowed to rebalance the customized portfolios after investing in them. However, development is under way and very soon you will be allowed to rebalance the customized portfolios even after investing.

You can initiate rebalance in Research Recommended Portfolios only once Research asks to do so i.e. the Rebalance tab becomes active for a portfolio only when suggested by Research.

Q14. How many stocks can I add in one portfolio through Custom One Click?

A14. You can add up to 50 stocks in one Portfolio using Custom One Click. You can create many such portfolios.

Q15. What is the difference between Order Book and Request Book in My One Click section?

A15. In the Order Book, the scrip wise details are shown whereas in the Request Book, the portfolio wise details are shown. The details related to date and time of order placement, stock code, order status, quantity, product type etc. are shown in these books.

Q16. Is iDirect One Click Portfolio available on mobile app?

A16. Currently, iDirect One Click Portfolio is available only on the new website. We will be incorporating the same in the new mobile app very soon.