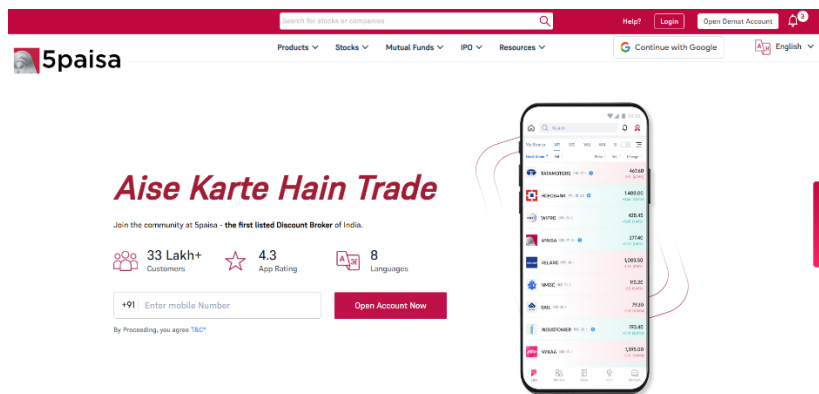
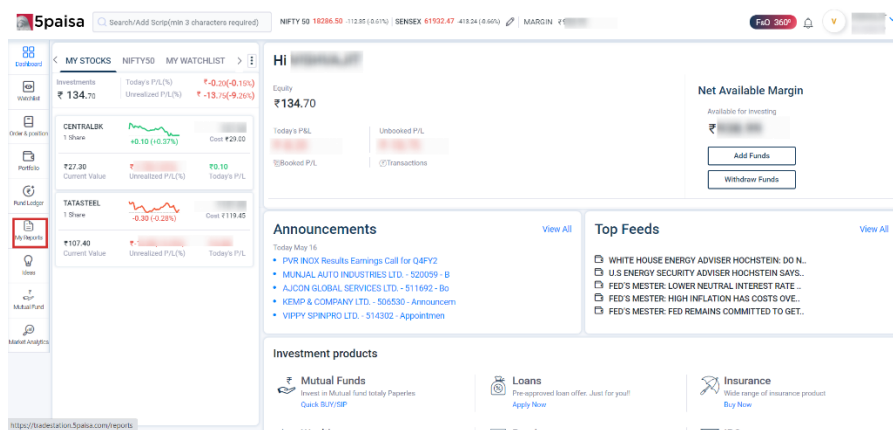


# 1. Visit 5paisa



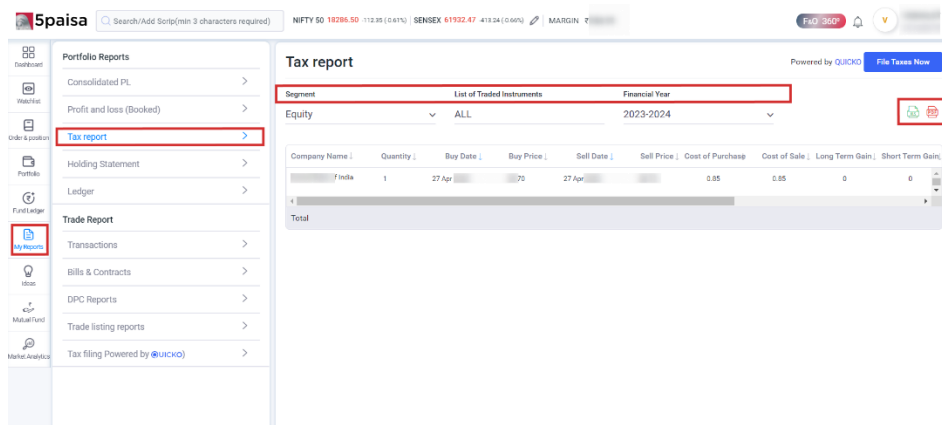
# 2. Login with your 5paisa credentials

# 3. Navigate to My Reports from the side navigation.

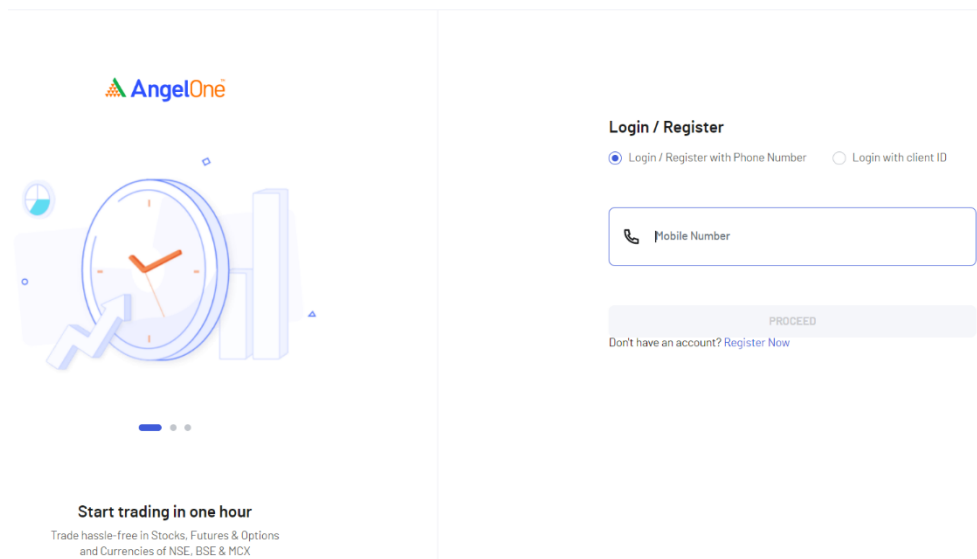


# 4. Under Portfolio Reports click on Tax report

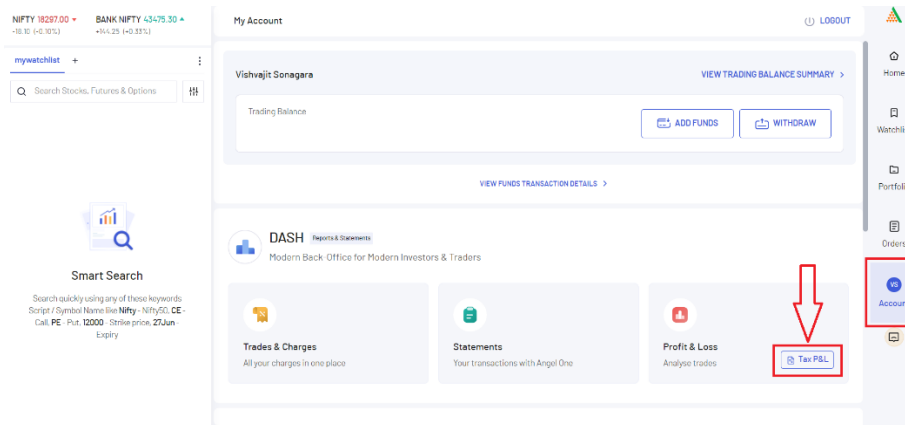
Select the segment, list of transactions, and financial year and click on the **Excel** button



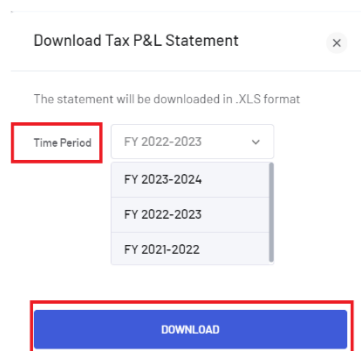
## 1. [Login](#) to your AngelOne trading account



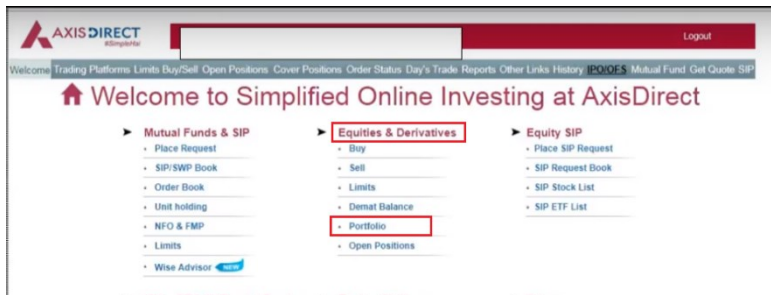
## 2. After you have logged in, navigate to Accounts Select **Tax P&L** under Profit & Loss tab



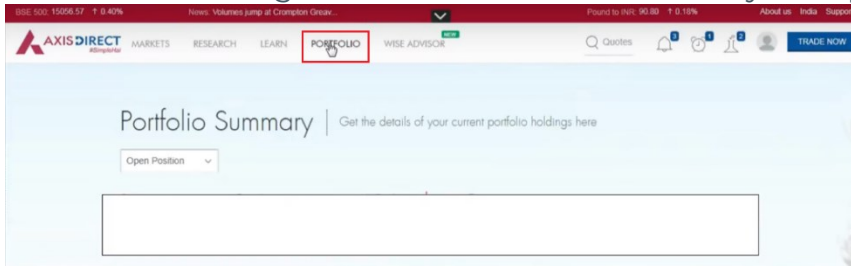
## 3. Select the "time period" you want to download the report for



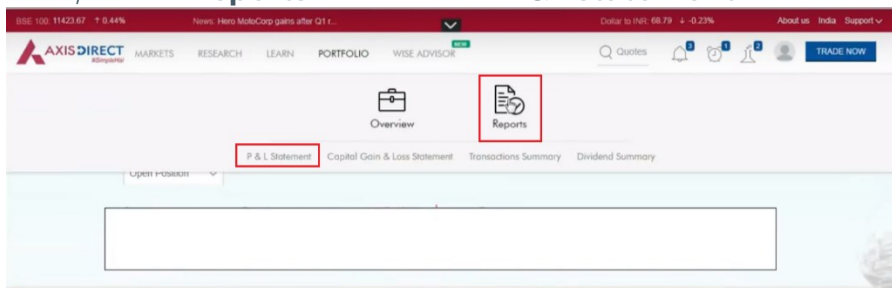
1. Log into your **Axis Direct Account**
2. Next, select **'Portfolio'** from your dashboard, under **Equity and Derivatives**



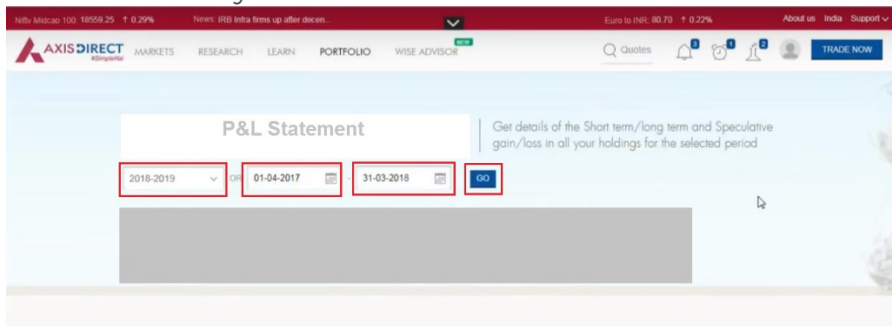
3. Select **'Portfolio'** again once the Portfolio Summary site opens



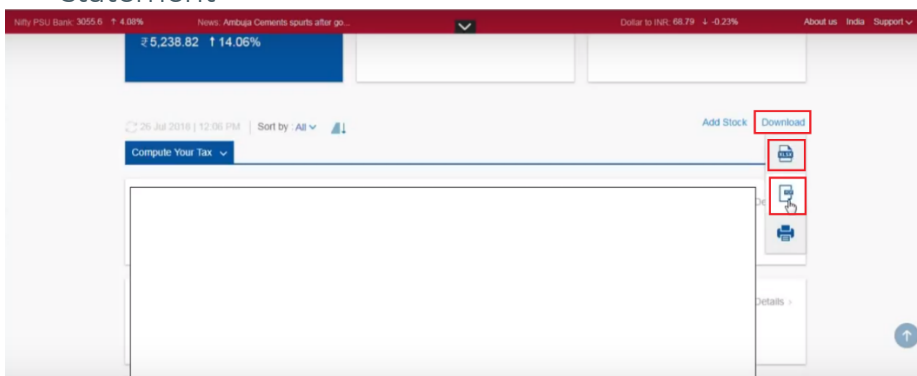
4. Now, select **'Reports'** and choose **'P&L statement'**



5. Select necessary filters and click on **'Go'**



6. Then, scroll down and click on the **PDF** or **Excel** button to download the P&L statement



## Steps to download Tax P/L

- Login to your Dhan account
- Navigate to **My Profile on Dhan** from the header
- Click on **Manage Account**
- Click on **Statements & Reports > Tax Reports**
- Click on **Email Tax Report** button to get the report

The screenshot displays the 'Manage Account' section of the Dhan platform. On the left, a sidebar menu lists various account management options: Profile & Account Details, My TradingView Webhook, My Documents, Active Sessions, DhanHQ Trading APIs & Access, and Statements & Reports. The 'Statements & Reports' option is highlighted with a red border. On the right, the 'Trade History' section is visible, featuring a dropdown menu for 'Request the statement for'. This dropdown menu is open, showing a list of report types: All Exchange Transactions (selected), All Exchange Transactions, Ledger Summary, Funds Summary, Contract Note, Daily Margin Statement, Profit & Loss Statement, Tax Report (highlighted with a red border), and Holding Summary. Below the dropdown, there is a 'Show trade history for:' section with a 'Recent' button and a note: 'Only trades executed successfully on ex'. A table with columns 'Date' and 'Name' is partially visible below the dropdown.

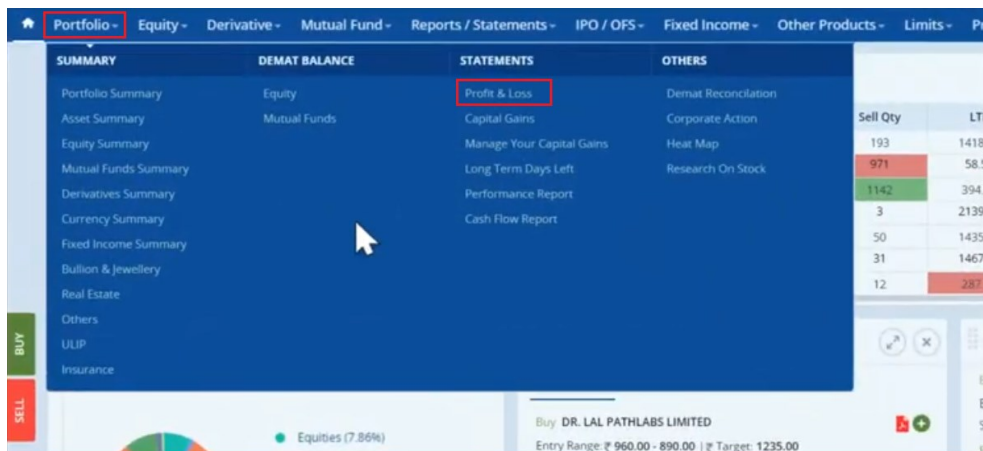
1. **Visit Fyers**
2. **Login with your Fyers credentials**
3. **Navigate to My Accounts from the header**
4. **Click on Tax PNL**
5. **Select the year 20YY from the header**
6. Select **Segment** as **ALL** and click on **submit**
7. **Click on CSV/PDF button to download the report**

1. **Login to Selfie**
2. **Go to My Geojit**
3. **Go to Statements**
4. **Select Capital Ganis Statement**
5. **Select the Segment**
6. **Select the Fiscal Year as 2023-2024 and other details**
7. **Click on Submit**
8. **Statement will be sent to your email ID after sometime.**

## Steps to download Profit and Loss Report from HDFC Securities

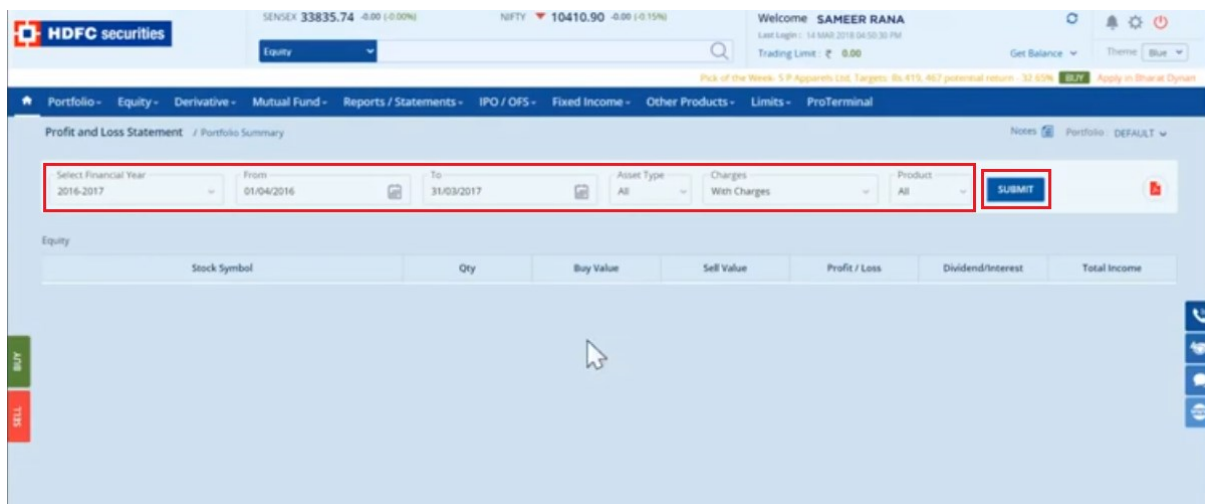
1. Log in to your HDFC Securities platform
2. Click on Portfolio

Next, choose Profit and Loss statement



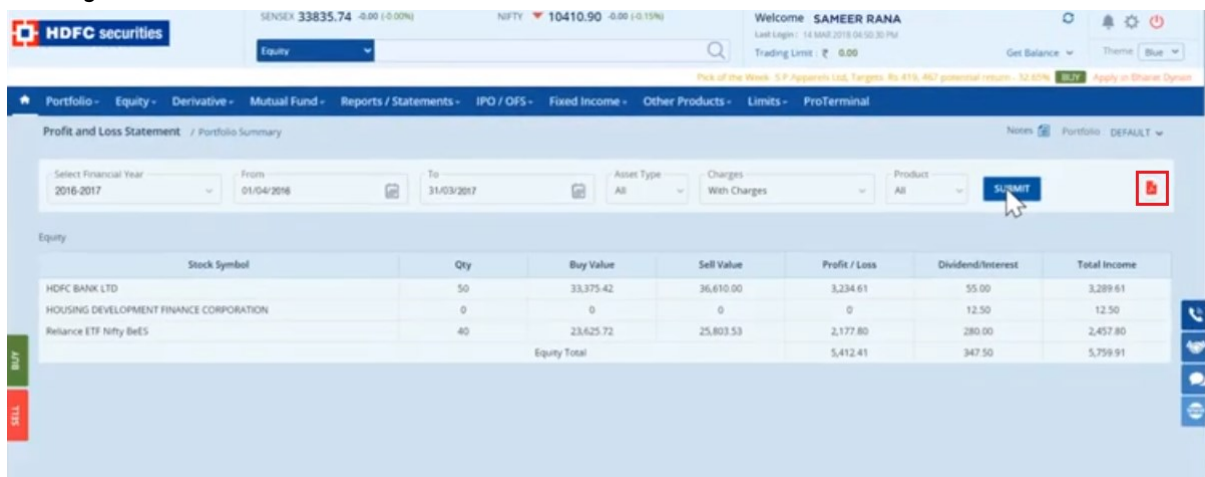
3. Select the Financial year, asset type and other necessary filters

Click on Submit



4. Click on the PDF button on the top right

Now, your statement downloads



5. The PDF will be downloaded on your PC  
Finally, this is what it will look like:





# How to download Tax Profit and Loss Report?

- **Step 1:** Firstly, navigate to the [ICICI portal](#) and login to your account.

The screenshot shows the ICICI Direct website's customer login interface. At the top, there is a header with the ICICI Direct logo and tagline 'Investments at Your Fingertips'. To the right, there is a dropdown menu for 'India' and a NIFTY index value of 11,333.85. Below the header is a navigation bar with links for Home, Product & Services, Markets, Research, and Open An Account. The main content area is titled 'Customer Login' and contains four input fields: 'User/Login Id', 'Password', 'Date of Birth or PAN (DDMMYYYY)', and 'StartIn' (set to 'Equity'). There are two orange buttons at the bottom: 'Login Now' and 'Login To New Site'.

- **Step 2:** Under 'Portfolio', select 'Equity'.

The screenshot shows the ICICI Direct website's portfolio page. At the top, there is a header with the ICICI Direct logo and tagline 'Investments at Your Fingertips'. To the right, there is a search bar for stocks and a 'Logout' button. Below the header is a navigation bar with links for Equity, Mutual Funds, F&O, Commodity, Currency, FD/Bonds, Insurance, NPS, IPO, Global Investment, Loan, Portfolio, Research, Markets, and More. The 'Equity' link is highlighted. Below the navigation bar is a sub-navigation bar with links for Equity, Mutual Funds, F & O, Currency, Commodity, FD/Bonds, My Asset Allocation, Portfolio Analysis & Recommendations, My Network, Summary, Watchlist, and [+]. The main content area is divided into three sections: 'Capital Gain', 'Annualized Return', and 'Consolidated Portfolio Analysis Beta'. Each section has a description and a list of items. The 'Capital Gain' section includes 'Equity Capital Gain' and 'Mutual Fund Capital Gain'. The 'Annualized Return' section includes 'Equity Annualized Return' and 'Mutual Fund Annualized Return'. The 'Consolidated Portfolio Analysis Beta' section includes a description and a 'Get Started' button. Below these sections is a 'Join iCommunity' section with a description and a 'Join Now' button.

### Step 3: Select the relevant Financial Year and Frequency. Press 'View'.

The screenshot shows the ICICI Direct website interface. At the top, there is a header with the logo, market indices (NIFTY: 11,416.95, SENSEX: 38,697.05), a search bar, and navigation icons. Below the header is a main navigation menu with categories like Equity, Mutual Funds, F&O, etc. The 'Portfolio' section is active. In the 'Important Information' section, a dropdown menu for 'Select Period' is set to '2019-2020', and the 'View' button is highlighted with a red box. Below this is a table with financial data.

Category	Net Sales Value	Net Purchase Value	Purchase Index Cost	Total Income
Long Term Capital Gain (STT not paid / NA and booked profit is more than double of Index Profit)	0	0	0	0
Long Term Capital Gain (STT not paid / NA and booked profit is less than double of Index Profit)	0	0	0	0
Long Term Capital Gain (STT paid)	0	0	0	0
Short Term Capital Gain (STT not paid / NA)	0	0	0	0
Short Term Capital Gain (STT paid)	2262.5	2437.25	2437.25	-174.75
Speculation Income (STT paid)	0	0	0	0
Business Income (STT paid)	0	0	0	0

### Step 4: Press on 'Download' to download the report to your device.

This screenshot is identical to the previous one, but the 'Download' button in the bottom right corner of the 'Important Information' section is highlighted with a red box. The 'View' button is no longer highlighted.

**Step 1:** Login to IIFL Securities portal with your credentials.

**Step 2:** Click on My Account.

**Step 3:** Click on Portfolio.

**Step 4:** Click on P/L summary realized.

**Step 5:** Download the Statement.

## 1. Log in to your Kotak Securities portal

Visit the Kotak Securities portal and log in to your account by entering the required

Login to your Trading Account

Login By  User ID  
 Nick Name

User ID

Password

Security Key / Access Code  [Generate Access Code](#)

Start In

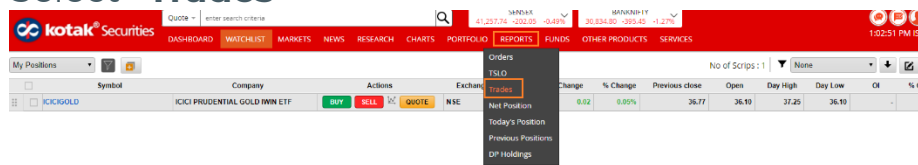
[Sign In](#) [Reset](#)

[Activate Account](#) | [Forgot Password](#) | [Privacy Policy](#) | [Terms Of Use](#) | [Sitemap](#)

CIN: U99999MH1994PLC134051 SEBI Registration No: NSE INB/INF/FINE 230808130, BSE INB 010808153/INF 011133230, NSDL/CDSL: IN-DP-NSDL-23-97

details.

## 2. Next, the top bar go to “Reports” Select “Trades”



## 3. Then, the Trading report is displayed

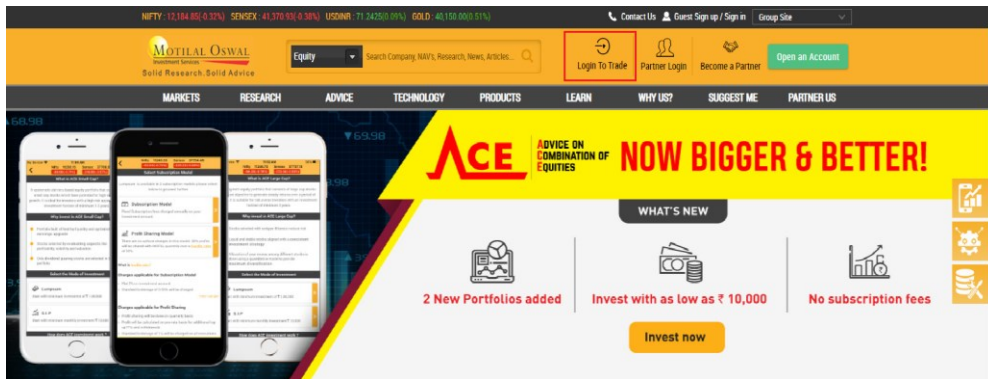
There is an option to download the report. To download click on the “Down arrow” and choose “Excel”

Security	IT	ME	Each Code	Exp Date	SIK Price	Opt Type	ITMS Order No.	DateTime	Buy/Sell	Qty Lot	Price

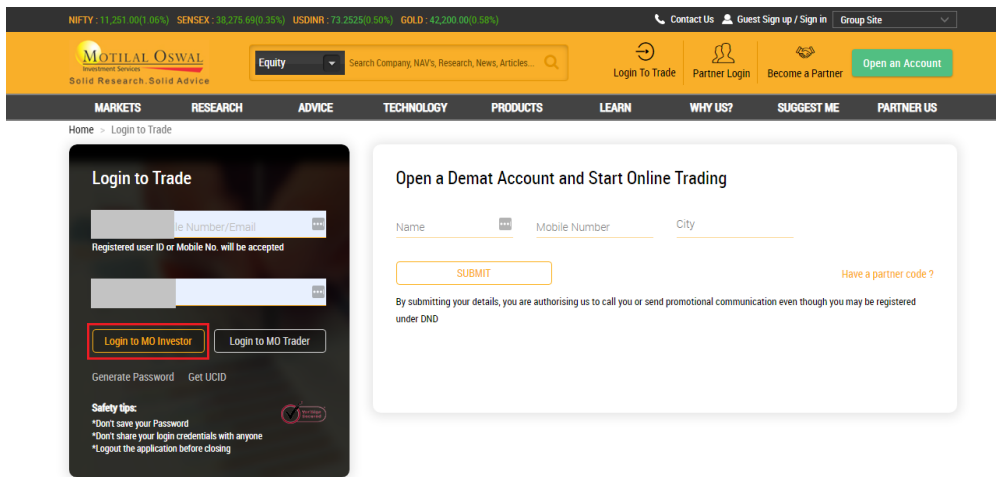
## 4. The file will be downloaded on your PC

Then you can view it.

1. Go to the Motilal Oswal Website
- 2.
3. Click on “Login to Trade” From the Website

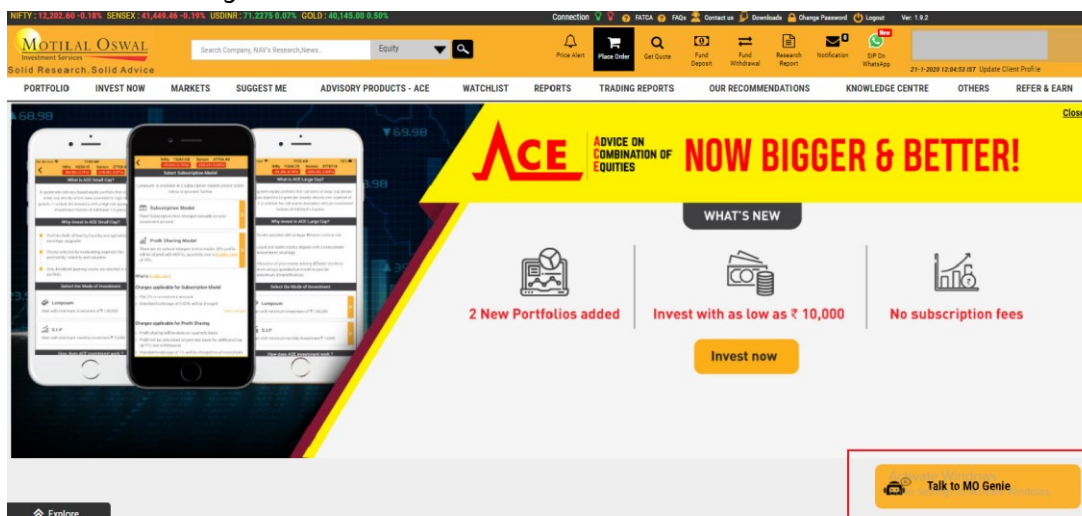


4. Fill your Client code and password And then click on “Login to MO Investor.”



Whether you are experienced trader or investor or beginning to make investments, Motilal Oswal is one of the leading stock brokers offering the best online share trading experience across all asset classes, be it Equities, Futures & Options, Commodities, Currencies, Mutual Funds, PMS, FDs, Bonds, and much more.

5. Click on the bot named “Talk to MO genie.”  
On the bottom right



## 6. Choose the option "Profit and Loss Statement."

Once the bot chat box opens up

The screenshot shows the Motilal Oswal website interface. At the top, there are market indices: NIFTY: 12,185.80 (-0.31%), SENSEX: 41,292.90 (-0.32%), USINR: 71.2475 (0.10%), and GOLD: 40,146.00 (0.58%). The navigation bar includes: PORTFOLIO, INVEST NOW, MARKETS, SUGGEST ME, ADVISORY PRODUCTS - ACE, WATCHLIST, REPORTS, TRADING REPORTS, OUR RECOMMENDATIONS, KNOWLEDGE CENTRE, OTHERS, and REFER & EARN. The main content area features a banner for ACE (Advice on Combination of Equities) with the text "NOW BIGGER & BETTER!" and "Invest with as low as ₹ 10,000". On the right, the MO Genie chatbot is active, displaying a menu with the following options: Ledger Report, IT Returns 2018-19 Report, Profit and loss statement (highlighted with a red box), E-Modification, DP Statement, and See More. Below the menu, there is a "Profit and Loss statement" button and a "Go back" button. The chatbot also displays "Activate Windows" and "Type your guess to get image to activate Windows."

## 7. The bot will ask you to select an option

You can select whichever Financial Year you wish to view

The screenshot shows the Motilal Oswal website interface. At the top, there are market indices: NIFTY: 12,187.00 (-0.31%), SENSEX: 41,394.25 (-0.32%), USINR: 71.2475 (0.10%), and GOLD: 40,146.00 (0.58%). The navigation bar includes: PORTFOLIO, INVEST NOW, MARKETS, SUGGEST ME, ADVISORY PRODUCTS - ACE, WATCHLIST, REPORTS, TRADING REPORTS, OUR RECOMMENDATIONS, KNOWLEDGE CENTRE, OTHERS, and REFER & EARN. The main content area features the same ACE banner. On the right, the MO Genie chatbot is active, displaying a menu with the following options: E-Modification, DP Statement, See More, Profit and loss statement, Profit and Loss statement (Please select from below options), Current FY (highlighted with a red box), Previous FY, and Go back. Below the menu, there is a "Current FY" button and a "Go back" button. The chatbot also displays "Activate Windows" and "Type your guess to get image to activate Windows."

## 8. Moving ahead, the bot will give you the start date and end date of that Financial Year you selected

Apart from that, the bot will give you an option of “Email” which means that your P&L report will be emailed to your registered Email address.

The screenshot shows the Motilal Oswal website interface. At the top, there's a navigation bar with various links like 'PORTFOLIO', 'INVEST NOW', 'MARKETS', etc. Below the navigation bar, there's a main banner with the ACE logo and the text 'ADVICE ON COMBINATION OF EQUITIES NOW BIGGER & BETTER!'. On the right side, there's a dropdown menu for 'MO Genie'. The dropdown menu is open, showing options: 'Current FY', 'Previous FY', 'Go back', 'Current FY', 'Start date:1/4/2019', 'End date:21/1/2020', 'Please select type of output', 'View', 'Email', 'Go back', and 'Email'. The 'Email' option is highlighted with a red box.

9. Select the preferred “Ledger Statement” option  
Choose this from the drop-down list.


The screenshot shows the Motilal Oswal website interface. The 'MO Genie' dropdown menu is open, showing options: 'Email', 'Ledger Statement Please select from below options', 'All Segment', 'Equity & CD', 'Commodity', 'Margin Funding', 'All Segment', 'Ledger Statement->All segment Please select from below options', and 'All Segment'. The 'All Segment' option is highlighted with a red box.

10. Select the Ledger Statement for the preferred timeline  
Pick the time period from the options

The screenshot shows the Motilal Oswal website interface. The 'MO Genie' dropdown menu is open, showing options: 'Equity & CD', 'Commodity', 'Margin Funding', 'All Segment', 'Ledger Statement->All segment Please select from below options', '3 months', '6 months', 'Current FY', 'Previous FY', and 'Previous FY'. The 'Previous FY' option is highlighted with a red box.

11. Lastly, after putting in all the details, your P&L Report will be emailed to your registered email address

Finally, you can go to your email and access it

 <b>Profit and Loss Statement (All)</b>					
Family				RM Name/Mobile/Email	
Client				SB Name/Mobile	
Trading Code/UCID/PAN				Period	
<b>Summary</b>					
Product	Speculative Gain	Short Term Gain	Long Term Gain	Total Gain	STT
Equity	0.00	-5989.43	0.00	-5989.43	155.05
	<b>0.00</b>	<b>-5989.43</b>	<b>0.00</b>	<b>-5989.43</b>	<b>155.05</b>
<b>Equity Summary</b>					
Term	Total Sale Value	Total Purchase Value	Gain/Loss	STT	
LONG TERM ( > 365 DAYS )	0.00	0.00	0.00	0.00	
SHORT TERM ( <= 365 DAYS )	75115.31	81104.74	-5989.43	155.05	
SPECULATIVE ( SAME DAY SQUAREOFF )	0.00	0.00	0.00	0.00	
	<b>75115.31</b>	<b>81104.74</b>	<b>-5989.43</b>	<b>155.05</b>	
<b>Equity Long Term</b>					
No data found.					

Activate Windows  
Go to Settings to activate Windows.



- Go to Paytm Money > Sign in
- Click on **Stock**
- Enter your **Passcode**
- Click on your **Name** from the header
- Navigate to **Statements**
- Select **Tax P&L** as the statement type
- Select the relevant financial year
- Click on **Download/Email**

## How to Access/download SBI Securities P&L statement?

The SBI Securities mobile application only allows you to view the reports. However, you can download the profit and loss statement from the SBI Securities web portal. Follow the steps below to download this statement:-

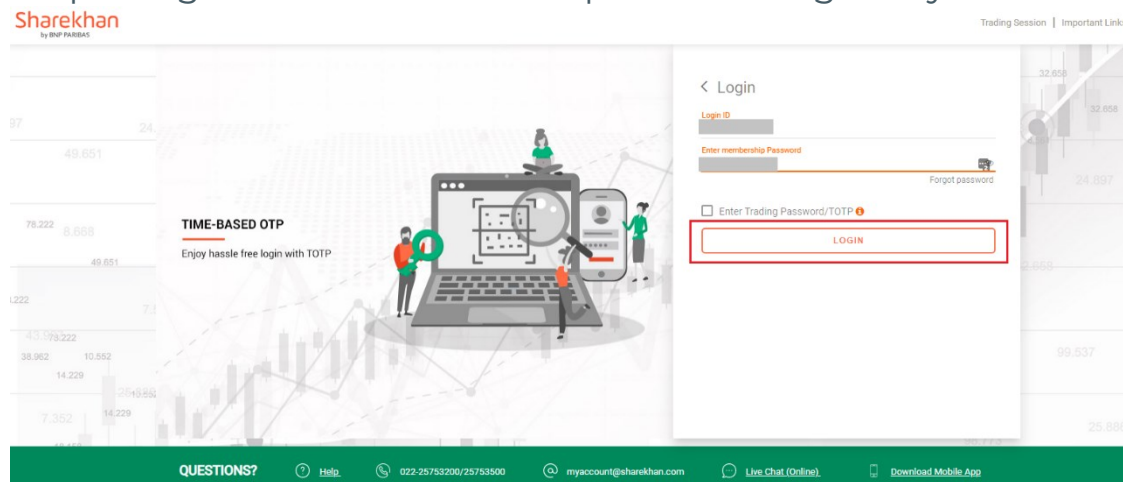
Log in to your account on the SBI Securities platform.

From the 'Portfolio' dropdown, select 'Profit & Loss' under the statements section.

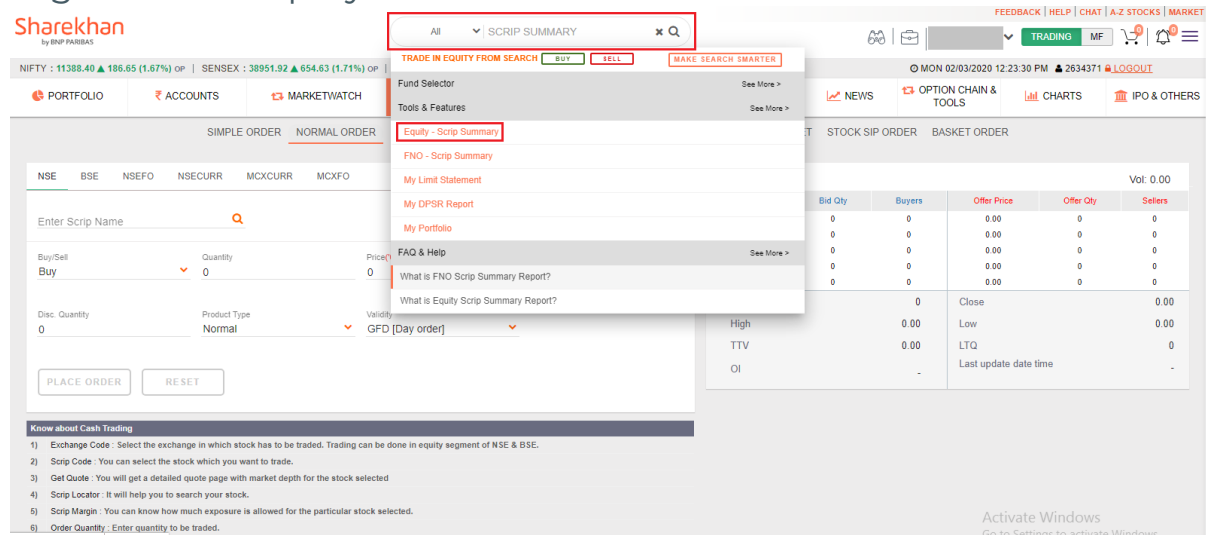
Select the relevant 'Financial Year' for which you want to file ITR, the period and the Asset Type, and click on 'Submit'.

You may now download this statement by clicking on the PDF icon.

Step 1: Log in to the **Sharekhan** portal and login to your account.

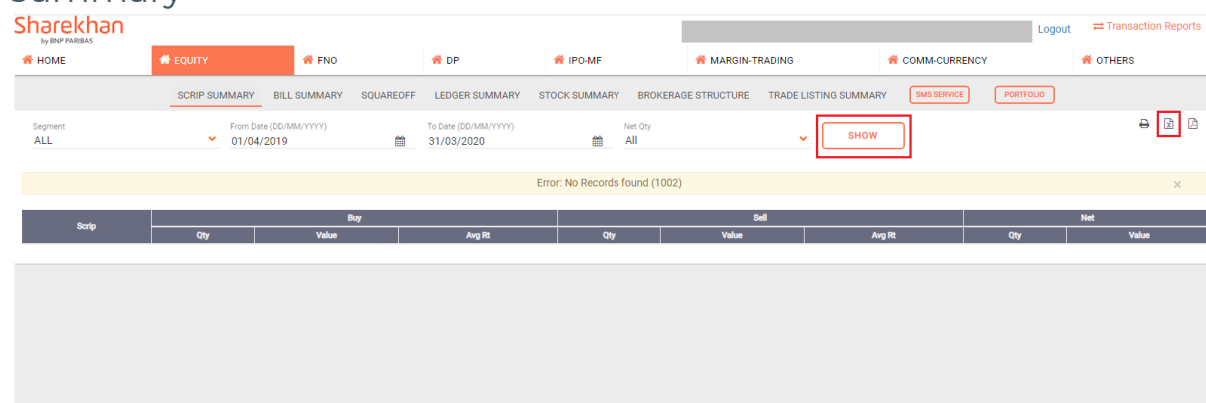


Step 2: Search for **Scrp summary**. You can do this from the search bar. You can view the scrip summary separately for all the segments i.e Equity or F&O.



Step 3: Now you can now view your **Scrp summary** from the dashboard

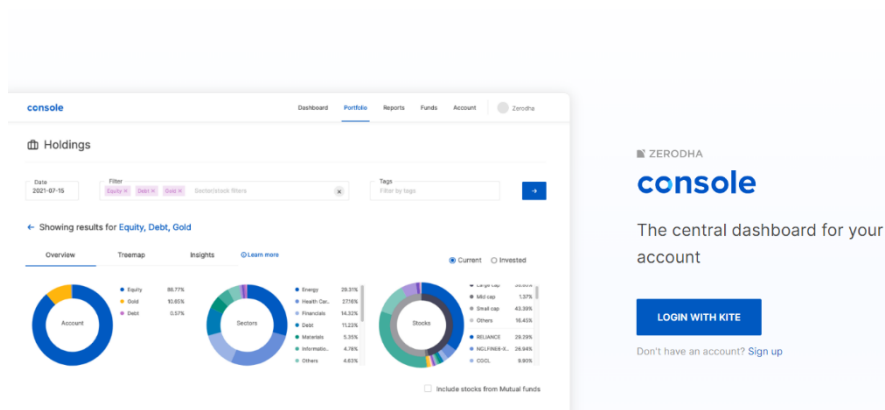
Step 4: Click on the **Excel sheet**. Click on **download** your scrip summary



To get your Profit and Loss statement, you can follow these steps:

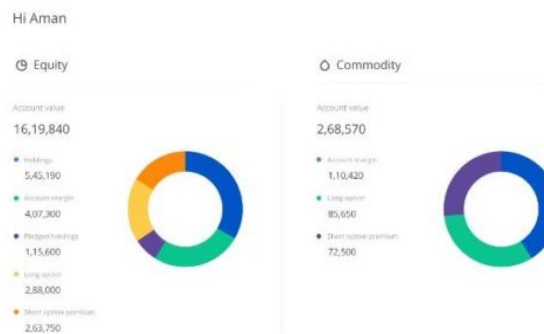
1. Login to the Upstox app using your 6-digit Pin or biometrics
2. Click on the '**Profile**' tab under '**Account**.'
3. Click on '**My account**.'
4. Select '**Reports**.'
5. Click on '**Profit & loss Report**.'
6. You have the option to either view and download the report using the provided options in the tab.
7. Select the required '**Segment**.'
8. Specify the date range for which you wish to download the reports, select '**Confirm**' and then click '**Get Reports**'
9. The Profit and Loss report corresponding to the selected period and segment will be displayed.
10. To receive the report, opt for either direct download or have it sent to your registered email address by selecting your preferred option

## 1. Visit Zerodha Console

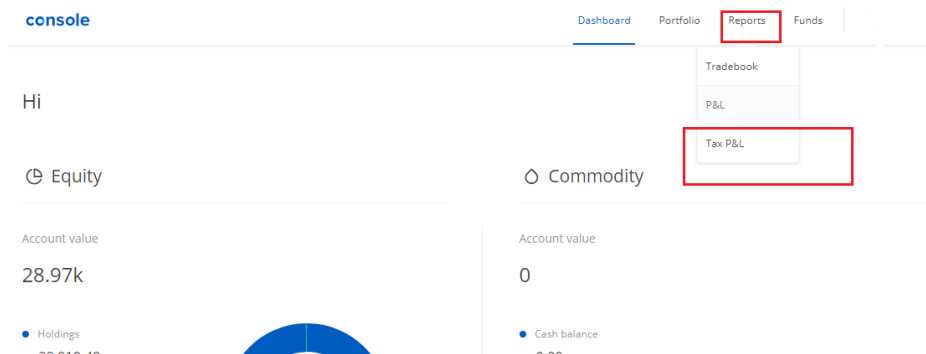


## 2. Login with your Kite credentials

Enter your user ID and password

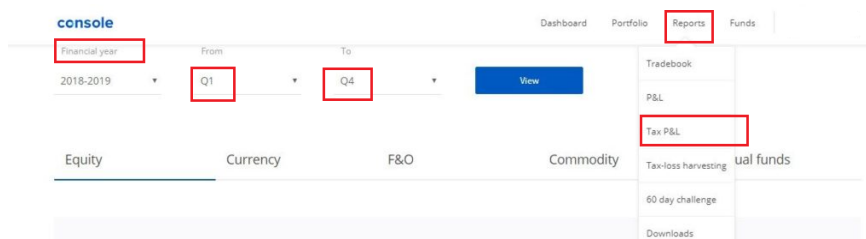


## 3. Click on Reports > Tax P&L



## 4. Select the specific Financial Year and Quarter

(Q1-Q4) of the FY tax P&L statement, you wish to download.



## 5. Your reports Page will open up

Next, click on the option “**Download Tradewise Tax P&L for all segments**” located at the bottom of the page.

Tax P&L @UICKO File your IT Returns

Financial year: 2019-2020 From: Q1 To: Q4 View

Equity	Currency	F&O	Commodity	Mutual funds
Intraday profit		Short term realized profit		Long term realized profit
-2.23k		3.61k		0
Intraday turnover		Total charges		Other credits/debits
8.24k		1.47k		-47.8

[Download Tax P&L report for all segments](#) [Download trade wise Tax P&L report for all segments](#)

## 6. Lastly, click on “Download Tradewise Tax P&L for all segments”

An Excel sheet will be downloaded into your system

ZERODHA	
Client ID	
Client Name	
PAN	
Tax P&L Statement for EQ from 2018-04-01 to 2019-03-31	
<b>Realized Profit Breakdown</b>	
Intra-day/Speculative profit	
Short-term profit	
Long-term profit	
Total realized profit	
<b>Turnover Breakdown (Scripwise)</b>	
Intra-day/speculative turnover	
<b>Other Debits/Credits including Service Tax</b>	
Total Charges	
Total Other Charges	