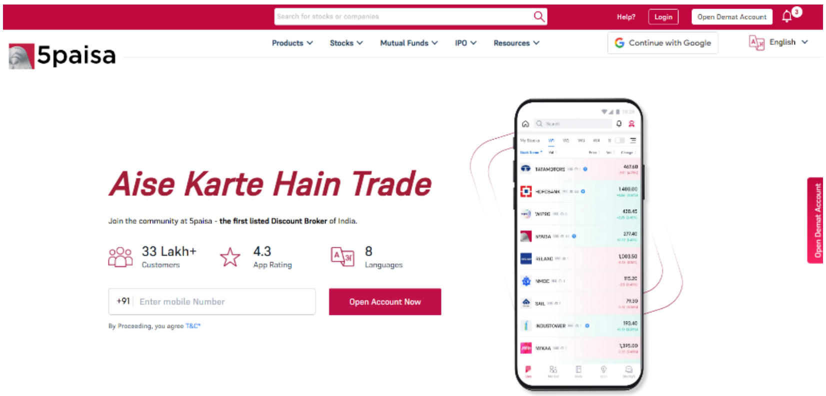
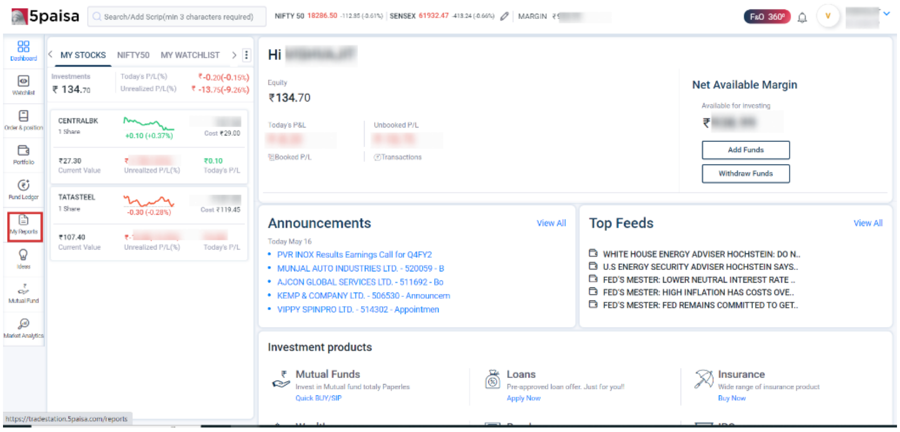
1. **Visit 5paisa**

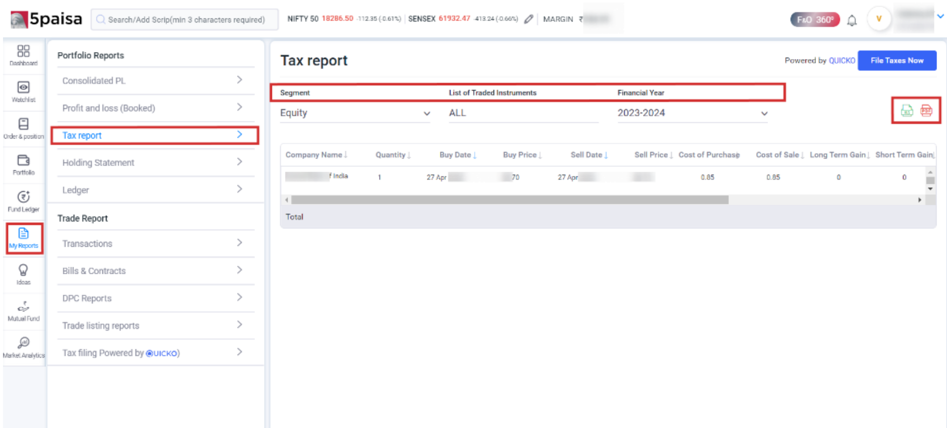


2. **Login with your 5paisa credentials**

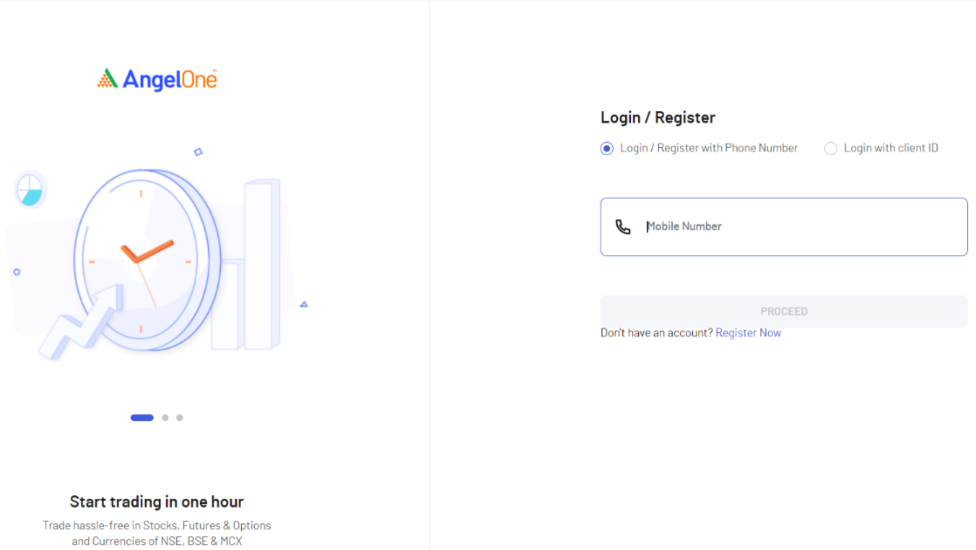
3. **Navigate to My Reports from the side navigation.**



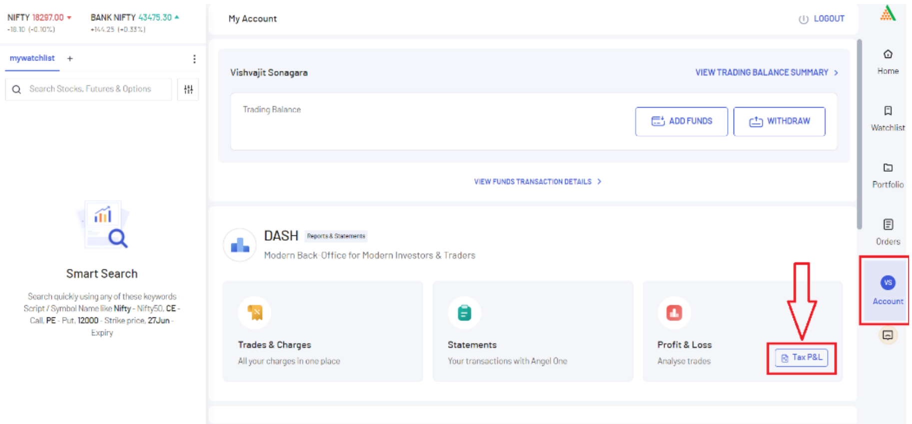
4. **Under Portfolio Reports click on Tax report**
Select the segment, list of transactions, and financial year and click on the **Excel button**



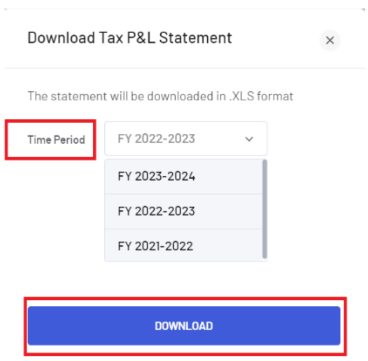
1. **[Login](#) to your AngelOne trading account**



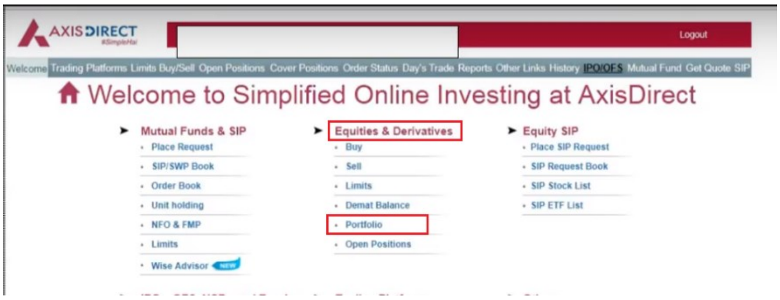
2. **After you have logged in, navigate to Accounts**
   Select **Tax P&L** under Profit & Loss tab



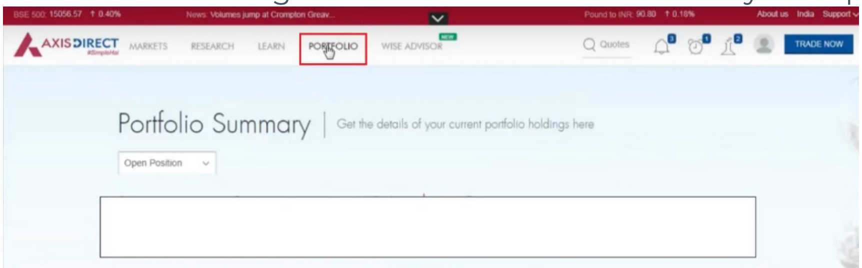
3. **Select the "time period" you want to download the report for**



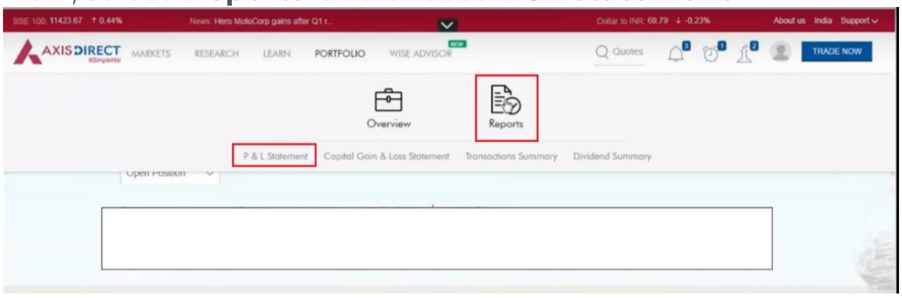
1. Log into your **Axis Direct Account**
2. Next, select ‘**Portfolio**‘ from your dashboard, under **Equity and Derivatives**



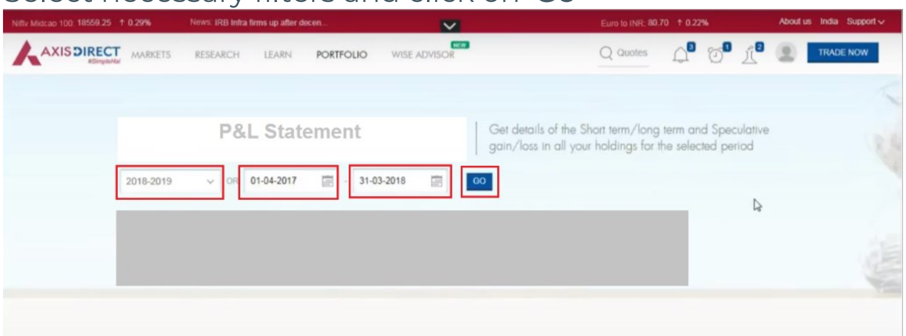
3. Select ‘**Portfolio**‘ again once the Portfolio Summary site opens



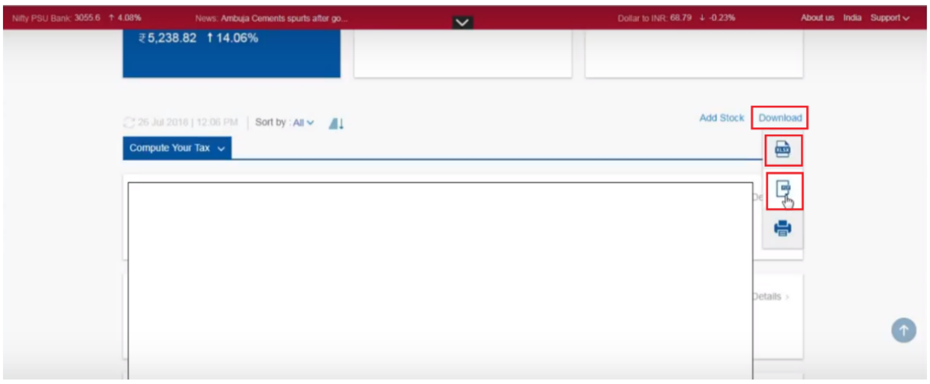
4. Now, select ‘**Reports**‘ and choose ‘**P&L statement**‘



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

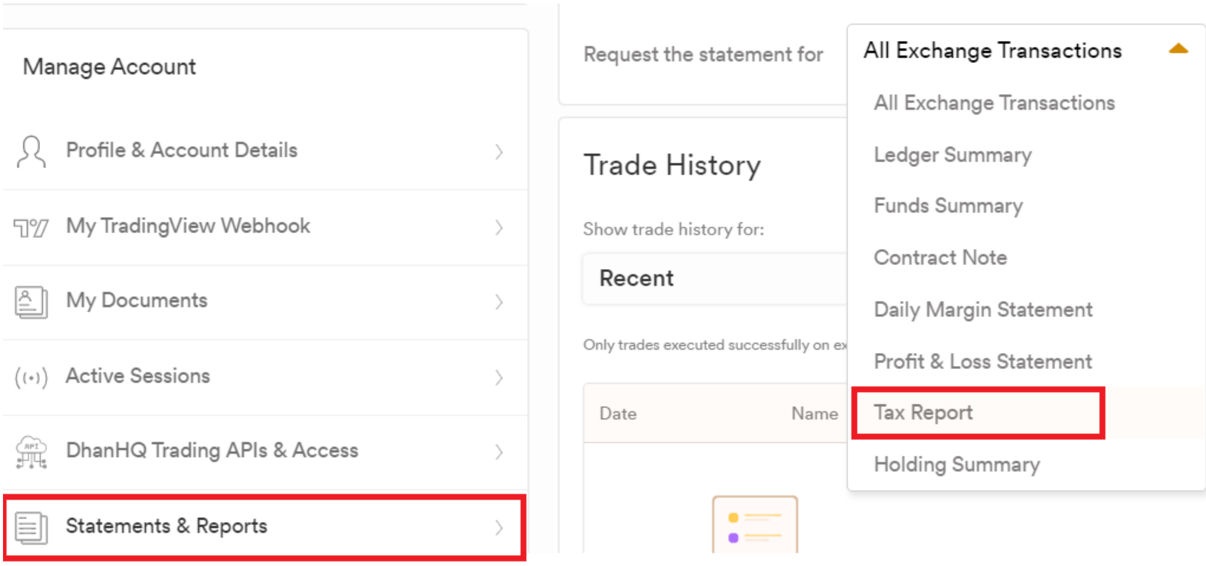


6. Then, scroll down and click on the **PDF** or **Excel button** to download the P&L statement



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



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**.

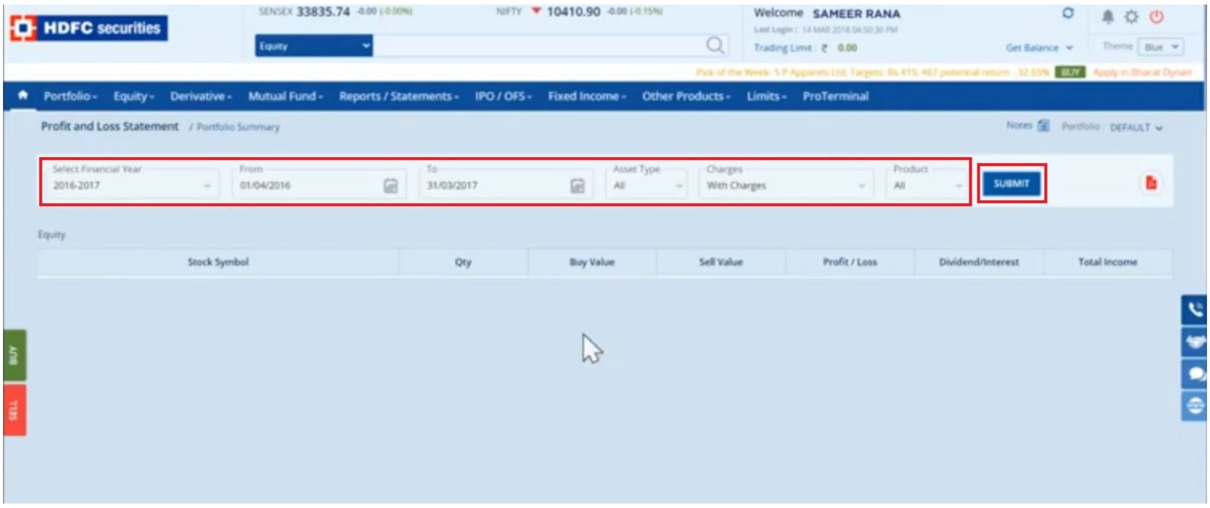
Steps to download Profit and Loss Report from HDFC Securities

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

Next, choose **Profit and Loss statement**

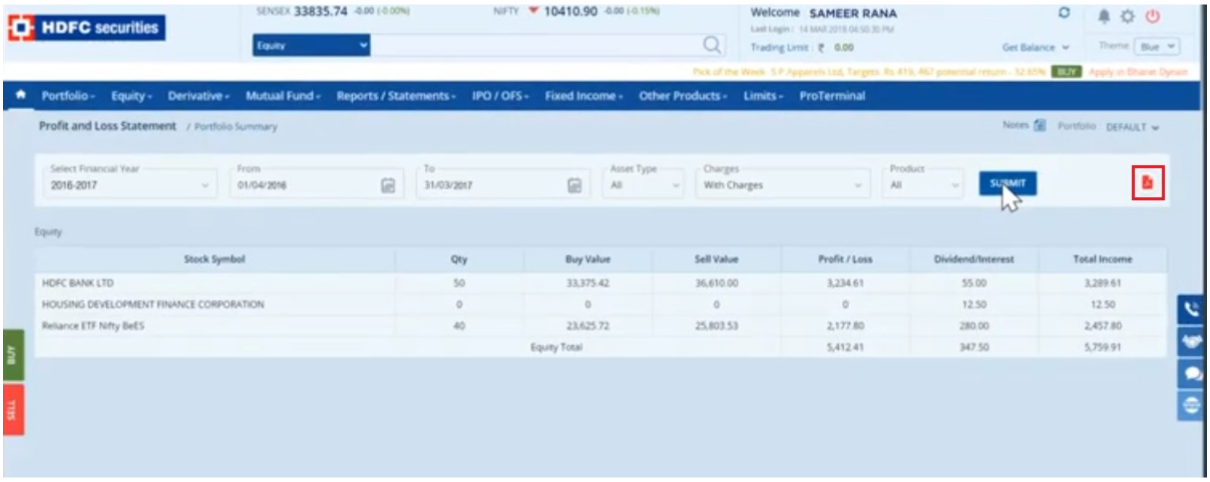
3. Select the Financial year, asset type and other necessary filters

Click on **Submit**



4. Click on the PDF button on the top right

Now, your statement downloads

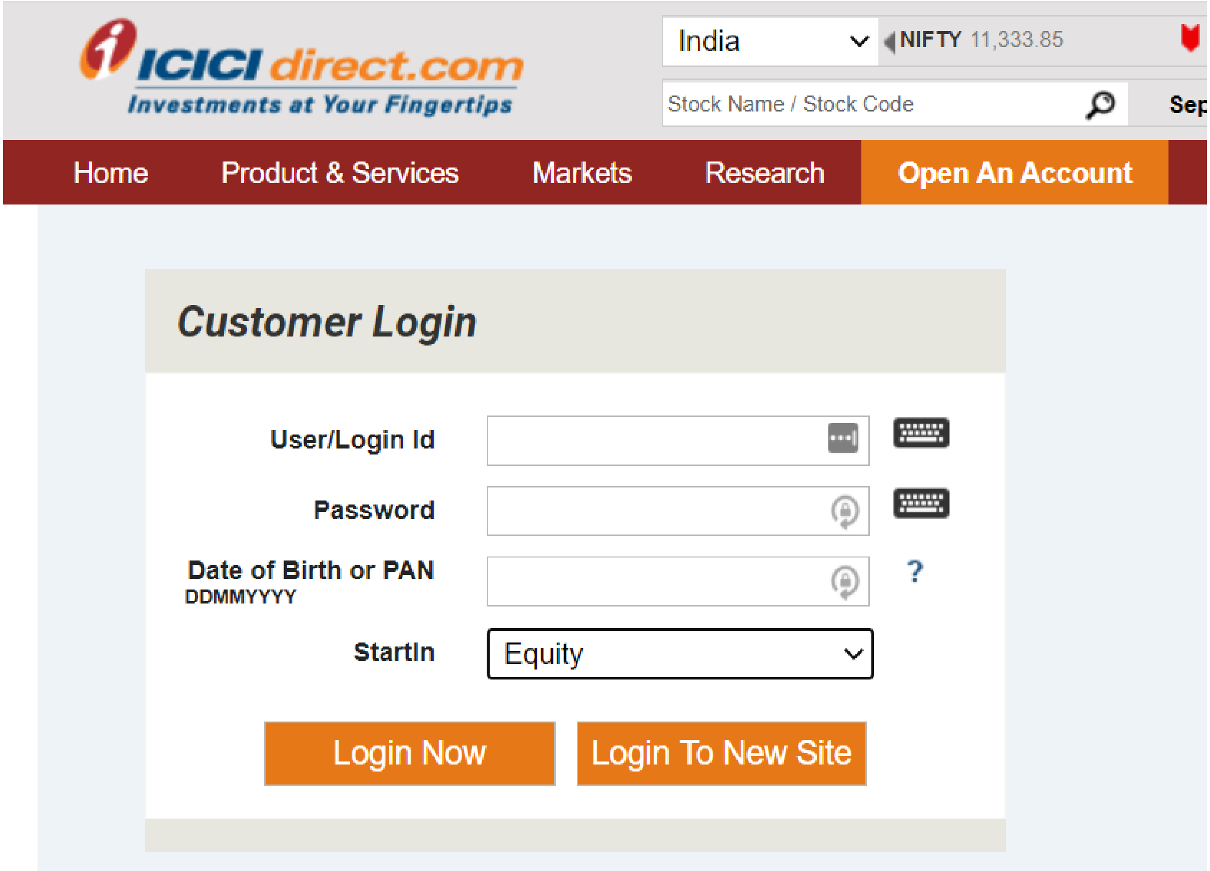


5. **The PDF will be downloaded on your PC**

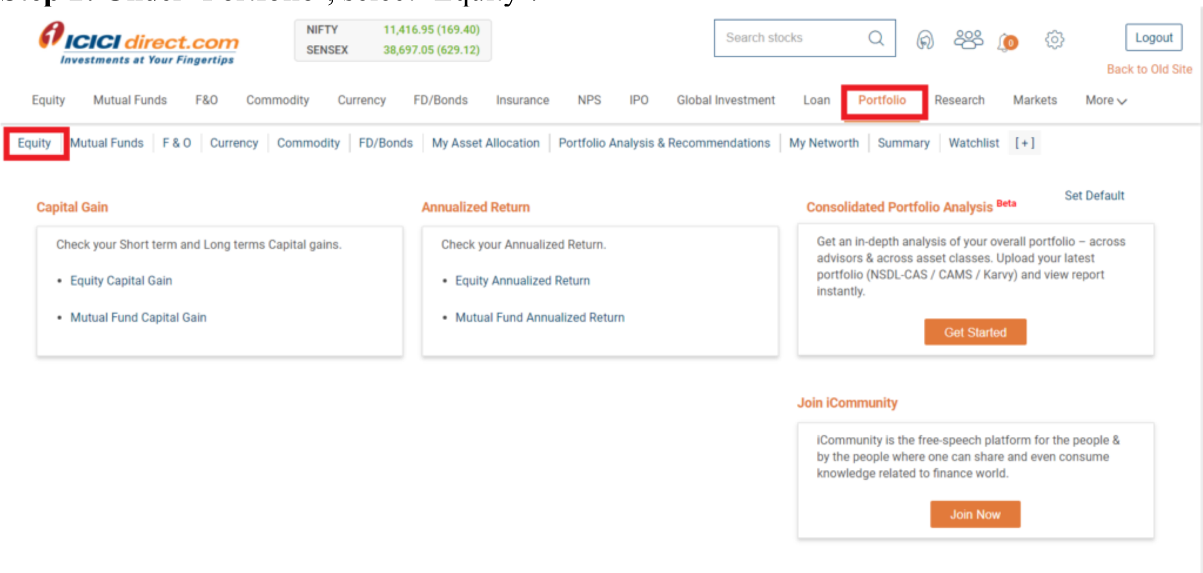
Finally, this is what it will look like:

How to download Tax Profit and Loss Report?

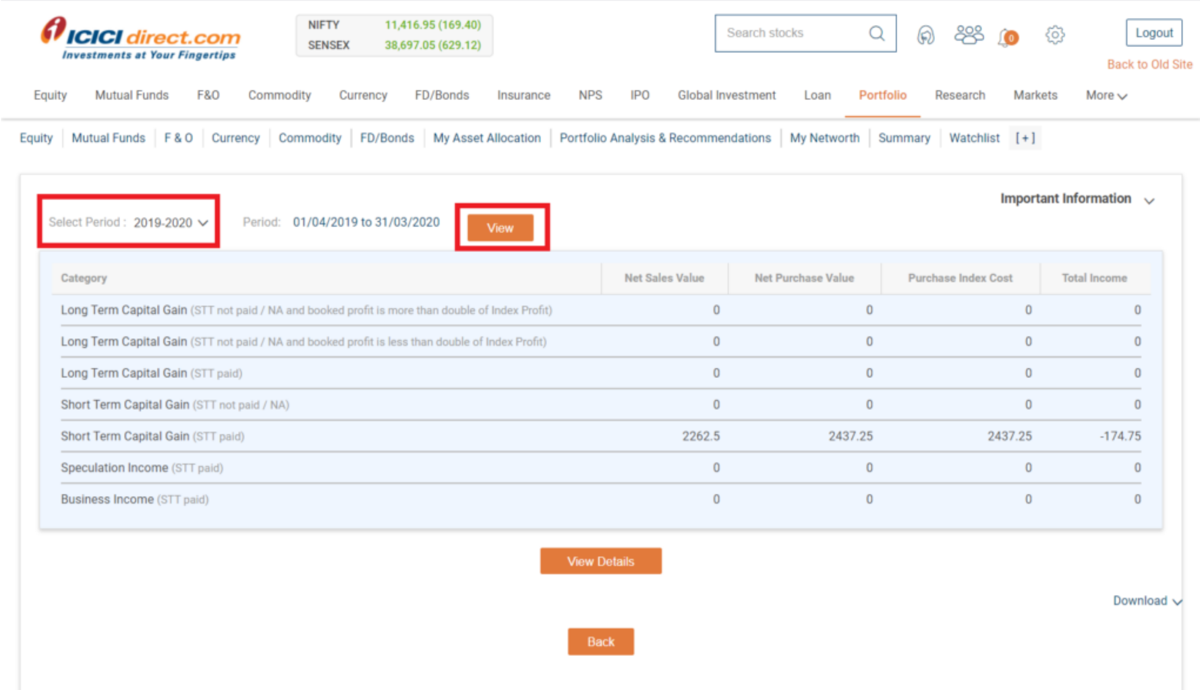
- **Step 1:** Firstly, navigate to the [ICICI portal]() and login to your account.



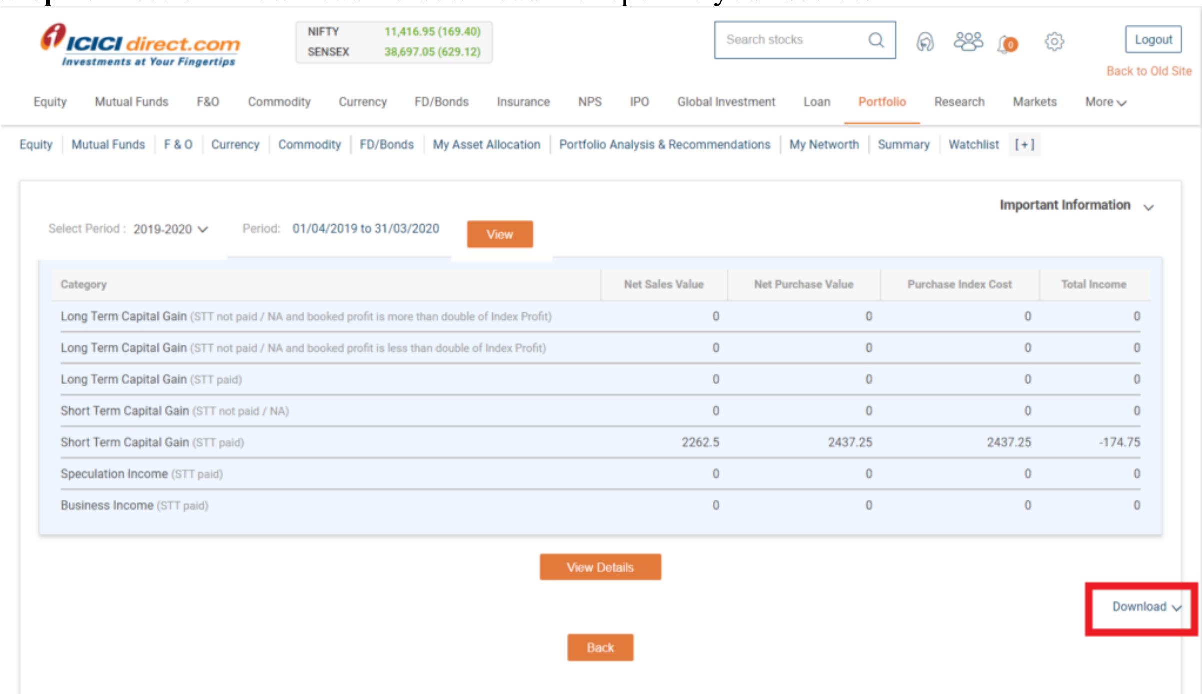
Step 2: Under 'Portfolio', select 'Equity'.



Step 3: Select the relevant Financial Year and Frequency. Press ‘View’.



Step 4: Press on ‘Download’ to download the report to your device.



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

Step 2: Click on My Account.

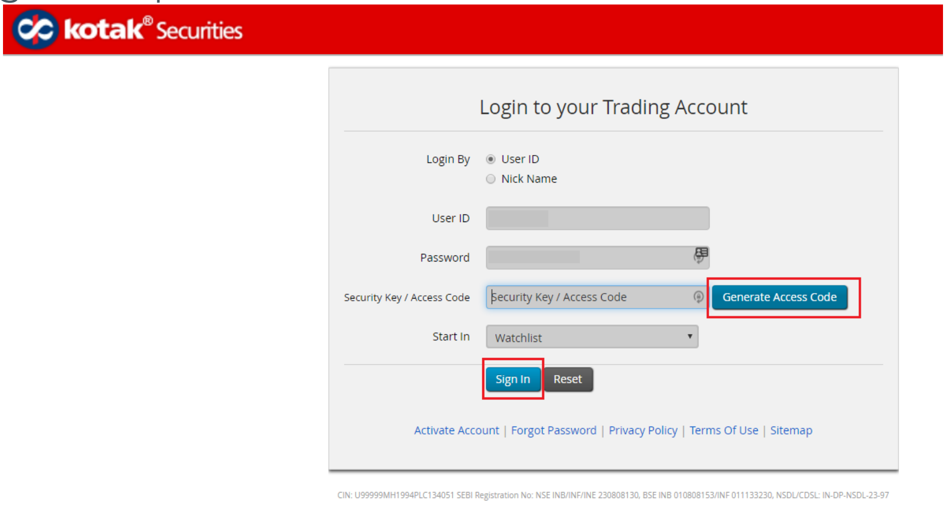
Step 3: Click on Portfolio.

Step 4: Click on P/L summary realized.

Step 5: Download the Statement.

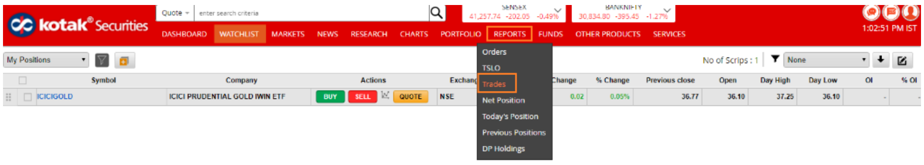
1. **Log in to your Kotak Securities portal**

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

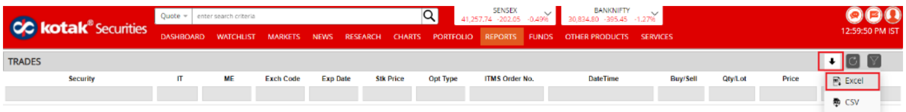


   details.

2. **Next, the top bar go to "Reports"**
   Select **"Trades"**



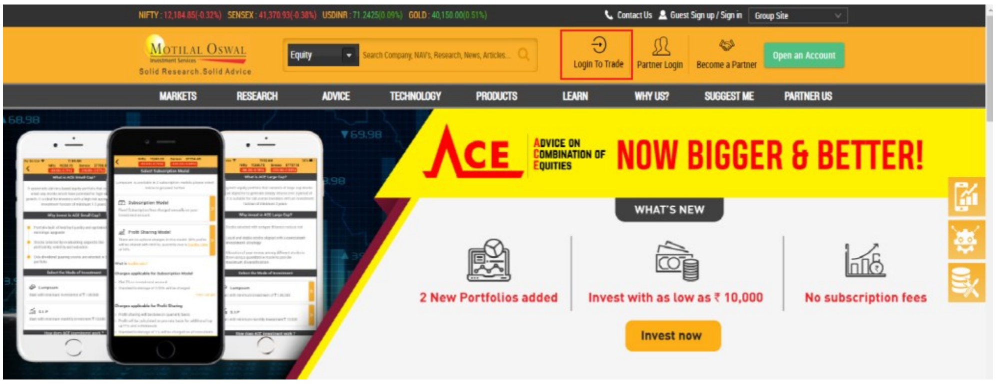
3. **Then, the Trading report is displayed**
   There is an option to download the report. To download click on the "**Down arrow**" and choose "**Excel**"



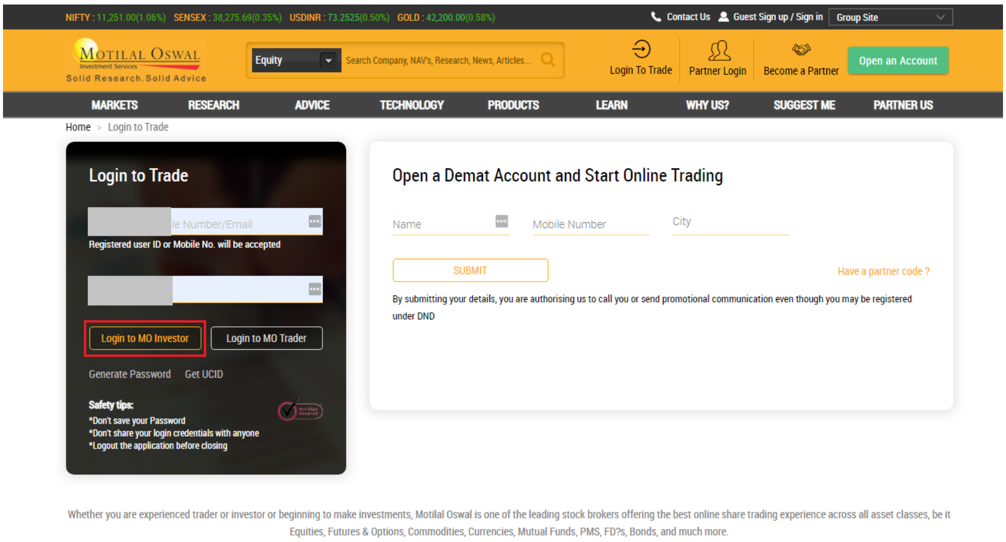
4. **The file will be downloaded on your PC**

   Then you can view it.

1. **Go to the Motilal Oswal Website**
2.
3. **Click on "Login to Trade"** From the Website

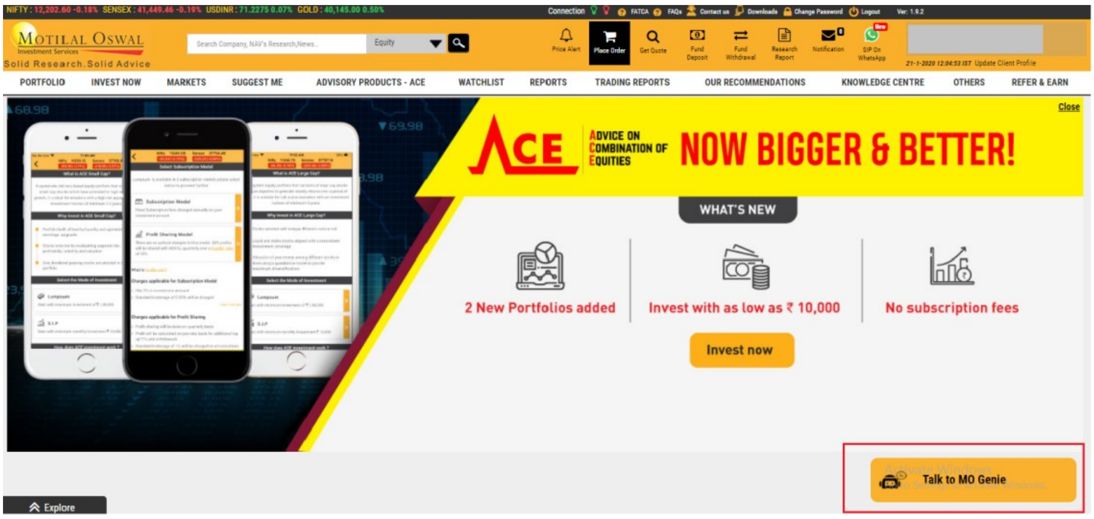


4. **Fill your Client code and password** And then click on "**Login to MO Investor.**"



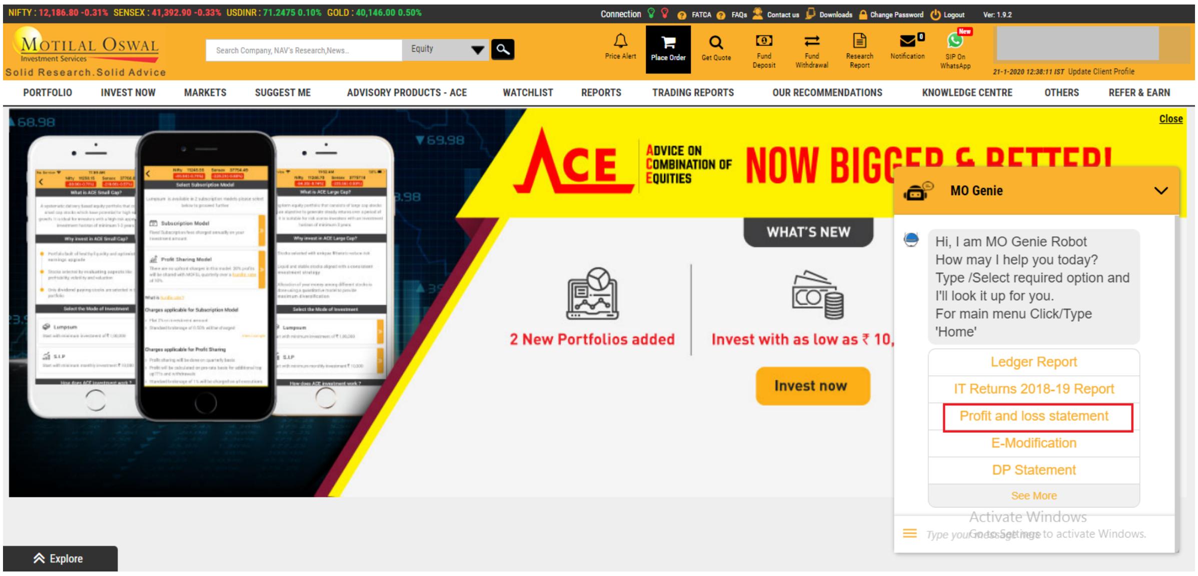
5. **Click on the bot named "Talk to MO genie."**

On the bottom right



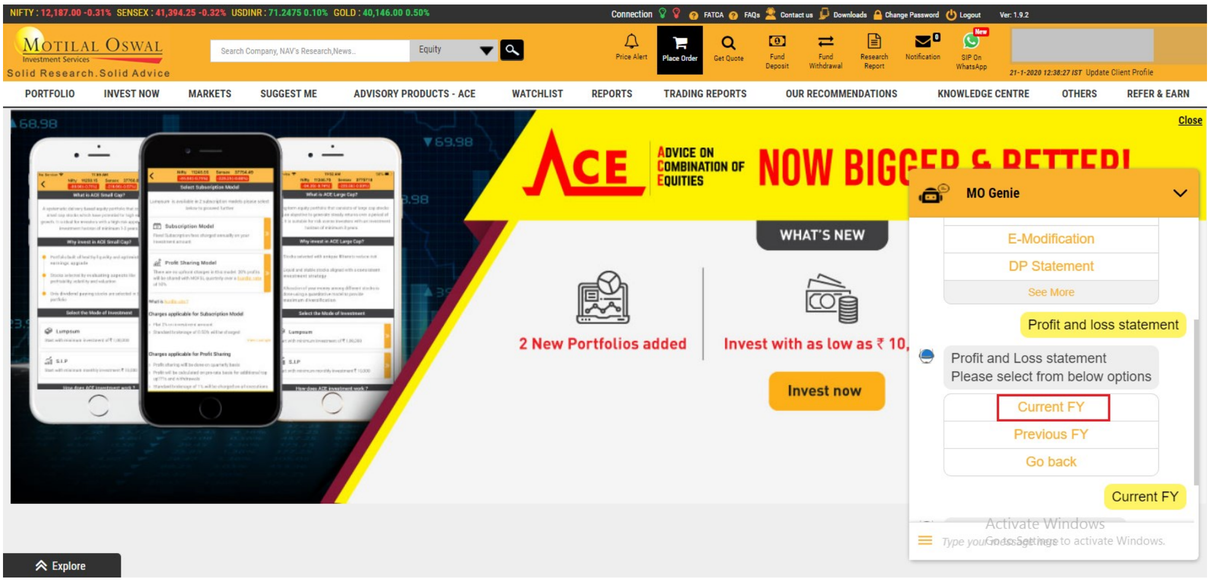
6. **Choose the option "Profit and Loss Statement."**

Once the bot chat box opens up



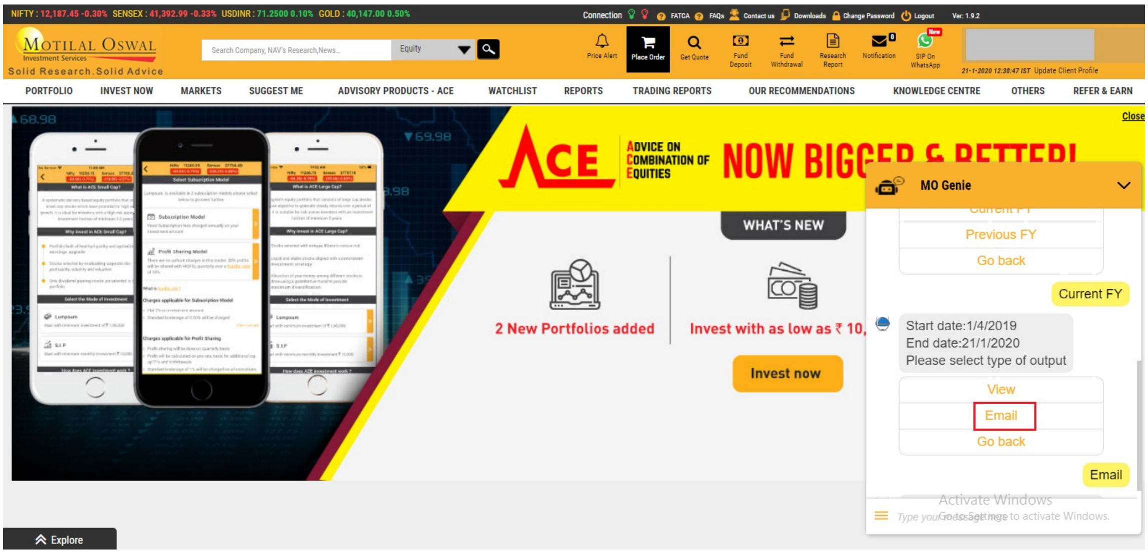
7. **The bot will ask you to select an option**

You can select whichever Financial Year you wish to view



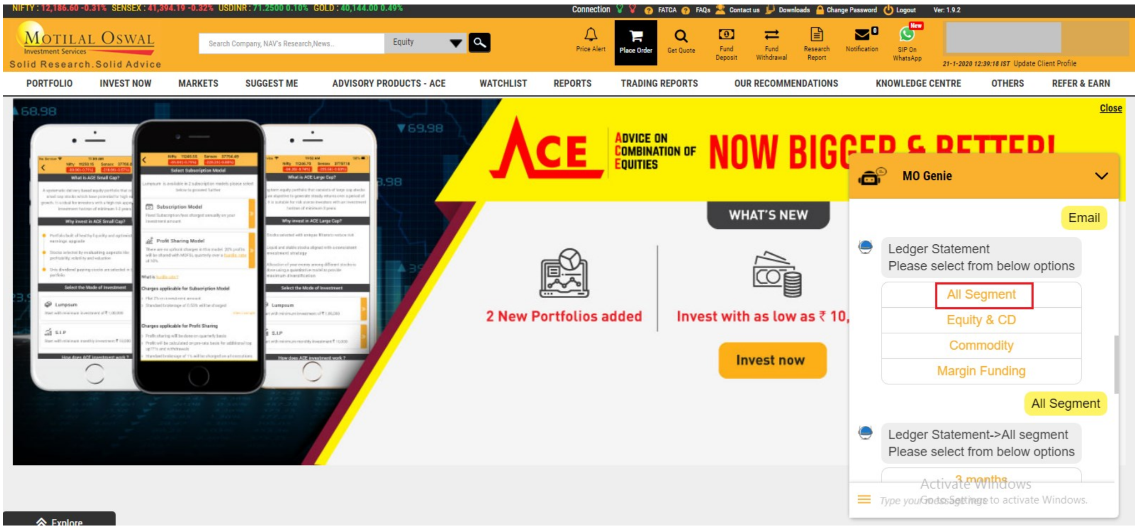
8. **Moving ahead, the bot will give you the start date and end date of that Financial Year you selected**

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.



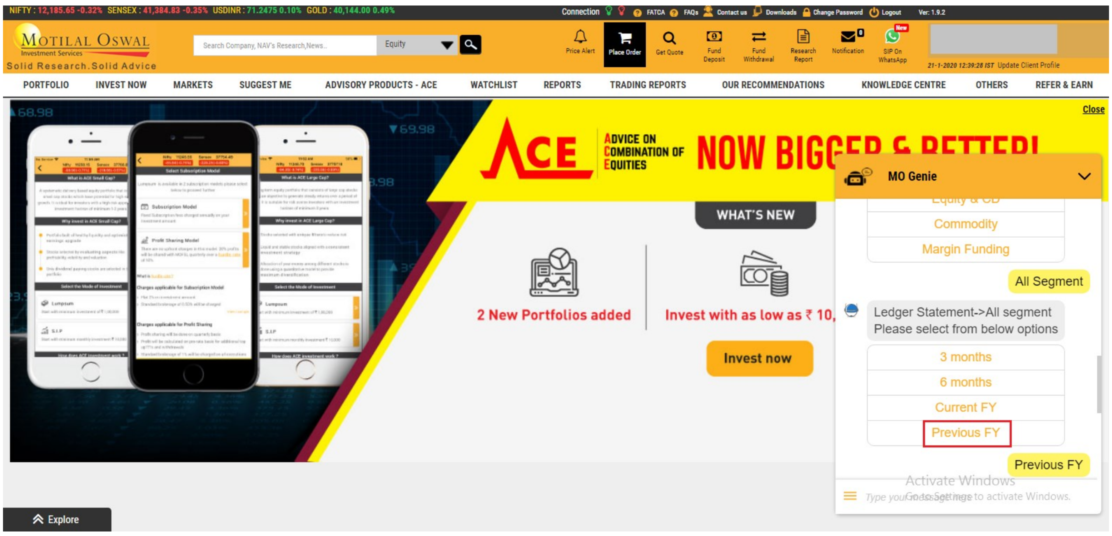
9. **Select the preferred “Ledger Statement” option**

Choose this from the drop-down list.



10. **Select the Ledger Statement for the preferred timeline**

Pick the time period from the options



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

MOTILAL OSWAL Investment Services
Solid Research, Solid Advice

Profit and Loss Statement (All)

Family		**RM Name/Mobile/Email**	
Client		**SB Name/Mobile**	
Trading Code/UCID/PAN		**Period**	

Summary

Product	Speculative Gain	Short Term Gain	Long Term Gain	Total Gain	STT
Equity	0.00	-5989.43	0.00	-5989.43	155.05
	0.00	**-5989.43**	**0.00**	**-5989.43**	**155.05**

Equity Summary

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
	75115.31	**81104.74**	**-5989.43**	**155.05**

Equity Long Term

No data found.

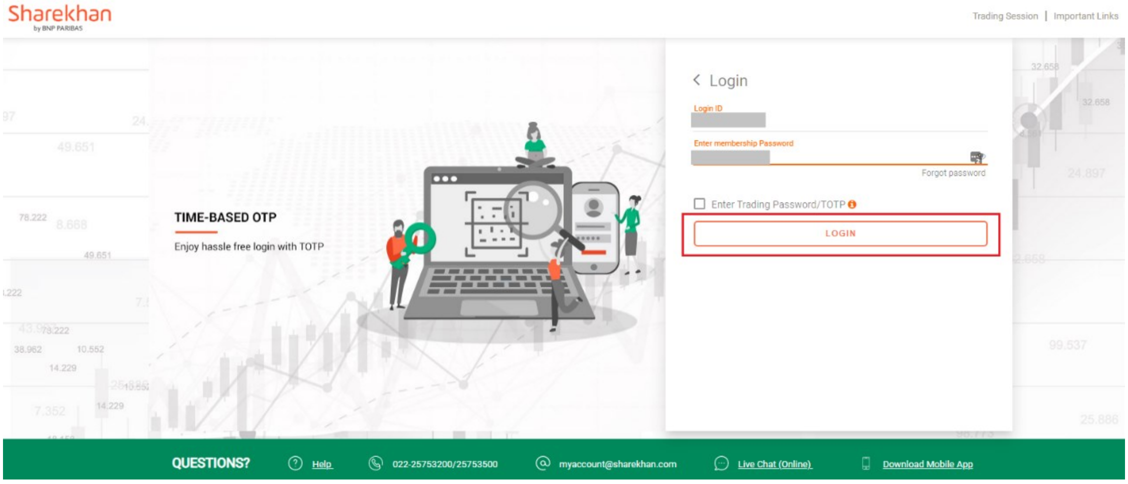
- Go to Paytm Money > Sign in
- Click on **Stock**
- Enter your **Passcode**
- Click on your **Name** from the header
- Navigate to **Statements**
- Select **Tax P&L** as the statement type
- Select the relevant financial year
- Click on **Download/Email**

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

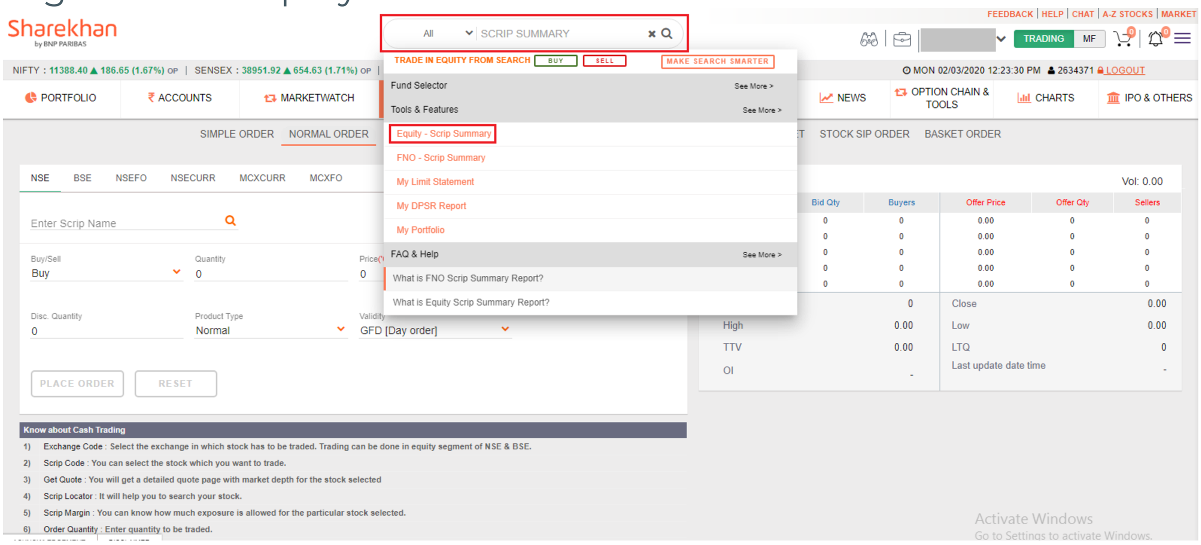
The SBI Securities mobile application only allows you to view the reports. However, you can download the profit and loss statement from the SBI Securities web portal. Follow the steps below to download this statement:-

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.

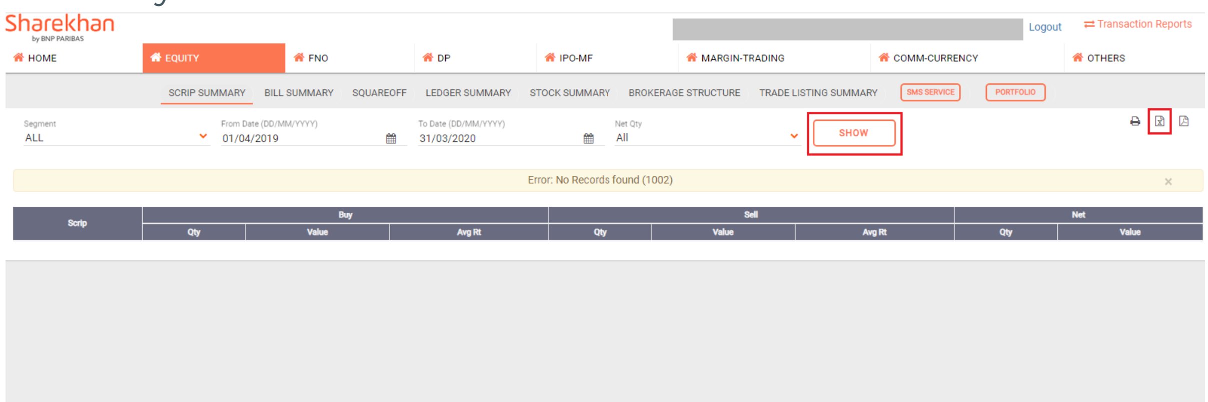


Step 2: Search for **Scrip summary**. You can do this from the search bar. You can view the scrip summary separately for all the segments i.e Equity or F&O.



Step 3: Now you can now view your **Scrip 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.

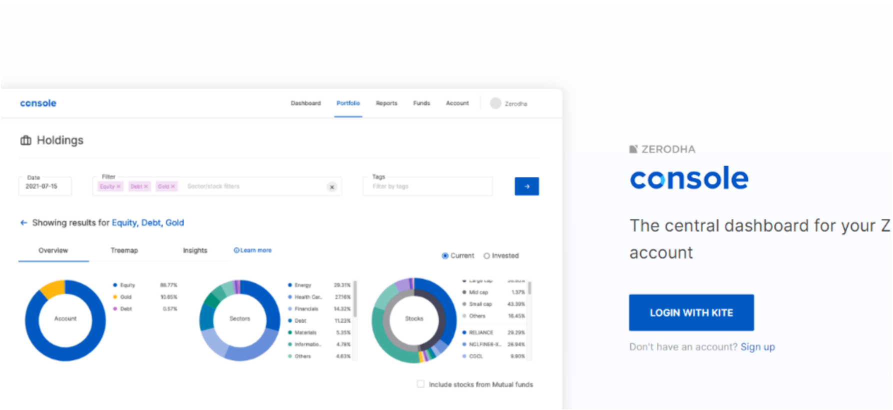
7.Select the required '**Segment.'**

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.

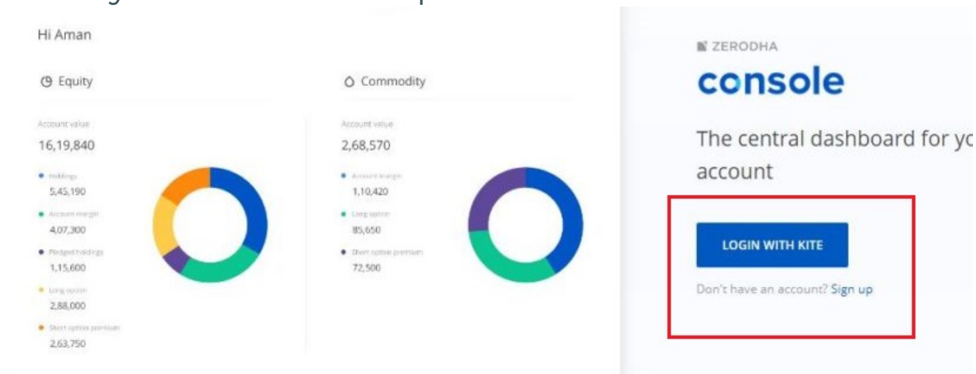
10. To receive the report, opt for either direct download or have it sent to your registered email address by selecting your preferred option

1. **Visit Zerodha Console**

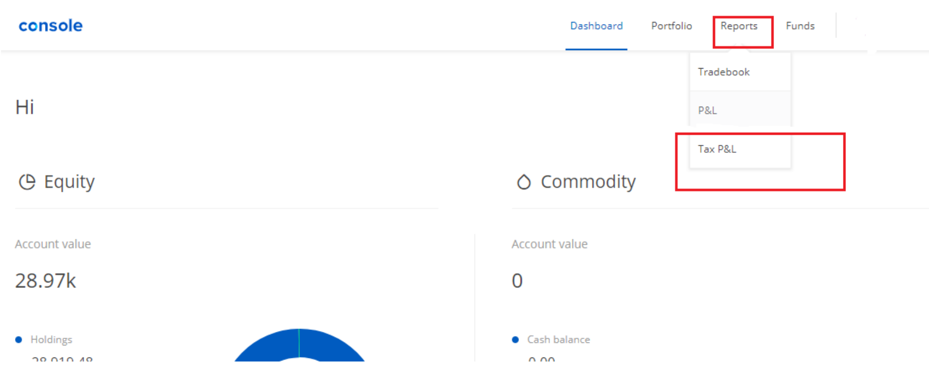


2. **Login with your Kite credentials**

Enter your user ID and password

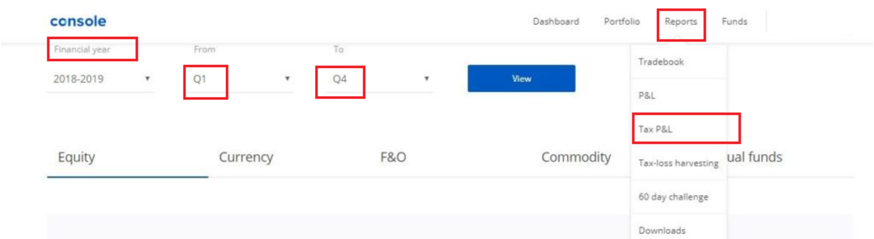


3. **Click on Reports > Tax P&L**

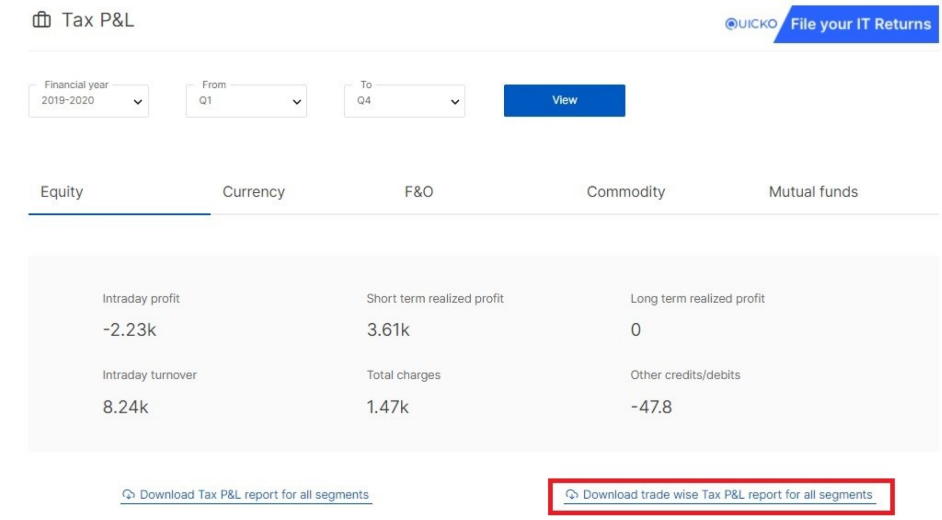


4. **Select the specific Financial Year and Quarter**

(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.



6. **Lastly, click on "Download Tradewise Tax P&L for all segments"**

   An Excel sheet will be downloaded into your system