

## MF ACCOUNT OPENING FORM – 1ST TIME / NEW CLIENT

Dear investor/s, Wealth Coaches/ Relationship Managers,

PLEASE BE NOTED THAT ALL RELEVANT DETAILS ALONG SIGNATURE OF INVESTORS HAS TO BE COMPLETED FOR 1ST TIME TO OPEN ACCOUNT WITH MF AND BSE STAR MF PLATFORM.

CLIENT WILL RECEIVE EMAIL OF THE SAME BEFORE AND ON SUBMISSION FORM SAFFOLLYA.INV@GMAIL.COM

CHECK / DRAFT SHOULD BE ISSUED IN FAVOUR OF "INDIAN CLEARING CORPORATION LTD".

DOCUMENTS SHOULD BE SUBMITTED PHYSICALLY TO US.

CC mail: care@saffollya.com

Whatsapp: 89021 87782 COMPLAIN: 93310 08884

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#### SAFFOLLYA INVESTMENTS

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#### <u>List of self attested documents required for opening BSE Star MF Account.</u>

· · · · · · · · · · · · · · · · · · ·	
1. In case of Individual	2. In case of on behalf of Minor
1.1 Account opening form	2.1 Account opening form
1.2 Cancelled cheque Copy/ bank statement Copy	2.2 Birth certificate of the minor/School leaving
1.3 Fatca	certificate /another suitable proof evidencing the
1.4 Address Proof Copy	date of birth of the minor.
1.5 Pan Copy	2.3 Cancelled cheque Copy/ bank statement Copy
1.6 KYC acknowledgement.	2.4 If the guardian is other than natural guardian
	(Mother/Father) then the court proof of the
\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \	appointed guardian and cancelled cheque / bank
1/2	statement
AFFOLLYA-o.	2.5 Fatca of guardian
amriddhi	2.6 Address Proof Copy of minor
Empowering Every Parmy for Manifold	2.7 Pan Copy of guardian
0.1	2.8 KYC acknowledgement of guardian.
3. In case of HUF	4. In case of Company
3.1 Account opening form (signed by the KARTA	4.1 Account opening form (UCC will be created in
under his seal)	Firms Name) signed with stamp
	4.2 Board of Resolution
HUF and KARTA Documents required	4.3 Authorised Signatory list
3.2 PAN COPY	4.4 cancelled cheque / bank statement in name of
3.3 Cancelled cheque/bank statement	company
3.4 Fatca	4.5 Non-Individual Fatca
3.5 Address Proof Copy	4.6 Address Proof Copy
3.6 Pan Copy	4.7 Pan Copy
3.7 KYC acknowledgement.	4.8 KYC acknowledgement of all signatories
5. In case of AOP (Association of Persons)	6. In case of Partnership Firm
5.1 Account opening form (UCC will be created in	6.1 Account opening form (UCC to be created in
Firms Name)	Firms Name)
5.2 Cancelled cheque / bank statement	6.2 PAN copy of Partner Ship Firm
5.3 Fatca	6.3 Partnership Deed
5.4 Address Proof Copy	6.4 cancelled cheque / bank statement
5.5 Pan Copy	6.5 Fatca
5.6 KYC acknowledgement.	
7. In case of Trust	8. In case of NRO
7.1 Account opening form (UCC to be created in	8.1 Account opening form of NRO A/C
Trust Name)	8.2 Cancelled cheque / bank statement
7.2 PAN copy of Trust	8.3 Fatca
7.3 Board Resolution (BR)	8.4 Address Proof Copy
7.4 Authorised Signatory list (ASL)	
	8.5 Pan Copy
7.5 Cancelled cheque / bank statement	8.6 KYC acknowledgement
9. In case of NRI	10. In case of Proprietorship
9.1 Account opening form of NRE A/C	10.1 Account opening form signed by proprietor
9.2 Cancelled cheque / bank statement	10.2 PAN copy
9.3 Fatca	10.3 Cancelled cheque / bank statement
9.4 Address Proof Copy	10.4 Fatca
9.5 Pan Copy	10.5 Address Proof Copy
9.5 KYC acknowledgement.	10.6 Pan Copy
Ŭ	10.7 KYC acknowledgement.
11. In case of LLP	, , , , , , , , , , , , , , , , , , ,
11.1 Account opening form	A STATE OF THE STA
11.2 Board of Resolution	**Note:
11.3 PAN copy	(/ AFFOLLYA-o_
11.4 Cancelled cheque / bank statement	Document photocopy / scan must be
·	clear and self attested in A4 size only
11.5 Fatca.	•

					Use Present Date
	/AUTO DEBIT UI	MRN			Date 2 5 0 2 2 0 2
Tick (V)		Sponsor Bank Code			Utility Code
CREATE MODIFY	I/We hereby authorize	ICCL			to debit (tick ) SB/CA/CC/SB-NRE/SB-NRO/Other
CANCEL	Bank a/c number	0 1 2 4 5 6 7	8 9 5 6 8 4		
with Bank	State Bank of In	dia	IFSC S B I N C	0 0 x x	x x x or MICR 4 x x x x x 6
an amount of	Rupees Fifteen Lac	s Only	1		₹ 15,00,000/-
FREQUENCY	Mthly Qtly	H-Yrly Yrly As &	when presented		DEBIT TYPE Fixed Amount  Maximum Amo
Reference 1	(Mandate Reference No.)			Phone No.	xxxxxxx567
Reference 2	(Unique Client Code-UCC)			Email ID	ashokshahxx@gmail.com
PERIOD —	3 1 0 1 2 0	ing charges by the bank whom		account as per l	latest schedule of charges of the bank.
Or _	Until Cancelled	1. ASHOK S	SHAH 2.		3
- This is to con	firm that the declaration has bee	n carefully read, understood & made I	ov me/us. I am authorizing the us	ser entity/ Corporate	e to debit my account, based on the instructions as agreed and signed by

#### ONE TIME BANK MANDATE & BENIFITS

- I have understood that I am authorised to cancel/amend this mandate by appropriately communicating the cancellation / amendment request to the User entity / Corporate or the bank where I have authorized the debit.

In order to ease out operational hassles BSE's Mutual Funds Platformhas introduced this facility which enables Investors to register a One Time Bank Mandate (OTBM).

The mandate provided by the investors shall be registered with the Investor's Bank

- Paperless mode of transacting via SMS, BSE Star MF Login, and Mobile Application anytime, anywhere.
- · Register for SIP in more than one scheme at a time.
- No Hassle of issuing a cheque every time you wish to purchase.
- Invest wihout a cheque/ DD/ transfer funds online.
- · Ease of placing multiple transactions like purchase & SIP through a single mandate.
- Seamless & faster debits through NACH\* platform
- \*NACH (National Automated Clearing House) is a funds clearing platform set up by NPCI (National Payments Corportion of India)

# This portion is Blank intentionally



#### SAFFOLLYA O SAMRIDDHI LLP

1st applicant Signature :





Broker/Agent Code ARN:	L37947		SUB-BROK	ER:		EUIN:		
Unit Holder Information						1		
Name of the First Applicant	: ASHOK SIN	NGH						
PAN Number: FGSPKXX	XXX	KYC:		Date of Birth : 0	1.01.19	87		
Father Name : RAMESHV	AR PRASAD	SINGH		Mother Name :	ILAWA	TI DEVI		
Name of Guardian :				PAN:				
Contact Address: 5/2/8 MU	JKHERJEE P	ARA ROAD	228	•				
City: KOLKATA	Pincode : 7	43125	St	ate: WEST BEN	GAL	Country: INDIA		
Tel.(Off):	Tel.(Res):		Er	Email: ashoksin87XX@gmail.com				
Fax (Off):	Fax (Res):			Mobile : <b>897XXXX147</b>				
Income Tax Slab/Networth :	3-5 Lacs		0	ccupation Details <b>S</b>	ervice/	Buisness etc		
Place of Birth : Kolkata	OLIVA-o	Country of Tax	Residence :	INDIA				
Tax Id No. :	riddhi							
Politically exposed person /	Related to Politi	cally exposed pers	son etc.?	Yes	5	No		
Mode of Holding: Single	Joint/ Eightl	her or Survivo	r	Occupation :				
Name of Second Applicant :	KARISHMA	SINGH If opt for Jo	oint or Eighther or	Survivor				
PAN Number: <b>As per Record</b> KYC:				Date of Birth : 🖊	s per l	Record		
Income Tax Slab/Networth : As per Record				Occupation Deta	ils <b>Serv</b>	ice/ Buisness/ Housewife		
Place of Birth: As per Re	cord	Country of Tax	Residence :	INDIA				
Tax Id No. :								
Politically exposed person /	Related to Politi	cally exposed pers	son etc.?	Yes	5	No		
Name of Third Applicant :					0	AFFOLLYA-O		
PAN Number :		KYC:		Date of Birth :				
Income Tax Slab/Networth :				Occupation Deta	ils	Empowering Every Penny for Mankins		
Place of Birth :		Country of Tax	Residence :					
Tax Id No. :						/		
Politically exposed person /	Related to Politi	cally exposed pers	son etc.?	Yes	5	No		
Other Details of Sole/ 1st A	oplicant							
Overseas Address :								
(In case of NRI investor)	FFULLYAS							
City:	Pincode:			Country:				
Bank Mandate Details								
Name of Bank : SBI BANI	<			Branch: NEXX MARKET				
A/C No.: 104852XXXXX		A/c Type: <b>SA</b>	VINGS	IFSC Code: SBINXXXXX				
Bank Address : Ground F	loor, Raja Ba	zaar						
City: Kolkata	Pincode : 7	43127		State : West B	engal	Country : India		
Nomination Details	•							
Nominee Name : LILAWA	TI DEVI		ν.	Relationship :				
Guardian Name (If Nominee	is Minor) :		./_					
Nominee Address : 5/2/8 N	IUKHERJEE	PARA ROAD		AFFULLTA ampridah Empowering Every Percy for Markis	T OL			
City: KOLKATA	Pincode : <b>7</b>	43125		State : WEST I	BENGA	L		
Declaration and Signature	- No. 100 W							
I/We confirm that details provi								
form of trail commission or any		- M	different con	npeting Schemes of va	irious Mu	tual Fund From		
amongst which the scheme is b	emg recommende	eu to me/us.						
Date : <b>XX.XX.2023</b>		Nag ja	Place : KC	DLKATA				
Alman 2th. Al	FOLLYA-o.	Market Done				AFFOLLYA-o. amridahi		

2nd applicant Signature :

3rd applicant Signature :

#### Know Your Customer (KYC) Application Form | Individual A. Fields marked with '\*' are mandatory fields. F. Please read section wise detailed guide G. List of State/U.T code as per Indian Motor Vehicle Act, 1988 is available at the end. C. Please fill the form in English and BLOCK letters. H. List of two character ISO 3166 country codes is available at the end. D. Please fill the date in DD-MM-YY format. KYC number of applicant is mandatory for update application. The 'OTP based E-KYC' check box is to be checked for accounts opened using E. For particular section update, please tick () in the box section number and strike off the sections not OTP based E-KYC in non-face to face mode New Application Type\* Update **KYC Number** (Mandatory for KYC update request) (To be filled by financial institution) Account Type\* Aadhaar OTP based E-KYC (in non-face to face mode) Minor Normal Personal Details (Please refer instruction A at the end) Prefix First Name Middle Name Last Name ASHOK SINGH ─ Name\* (Same as ID proof) RAMESHWAR SINGH LILAWAT 0 1 - 1 9 8 7 F- Female T- Transgender FORM 60 furnished Married Unmarried Others IN- Indian Others - Country Country Code Resident Individual Non Resident Indian Foreign National Person of Indian Origin 2. PROOF OF IDENTITY AND ADDRESS\* (Please refer instruction B at the end) Certified copy of OVD or equivalent e-document of OVD or OVD obtained through digital KYC process needs to be submitted (anyone of the following OVDs) Passport Expiry Date D D - M M PHOTO\* X04DFXXXX Driving Licence Expiry Date 1 2 -E-National Population Register Letter F-Proof of Possession of Aadhaar No need to attach. Aadhaar card. If submitted, Aadhaar Number to be masked by the customer No need to attach. Aadhaar card. If submitted, Aadhaar Number to be masked by the customer Offline verification of Aadhaar No need to attach. Aadhaar card. If submitted, Aadhaar Number to be masked by the customer photo without covering Address [For other than resident Individual, please mention Overseas Address] City/Town/Village\* SO 3166 Country Code\* Pin/Post Code\* State/U.T Code\*

3. CURRENT ADDRESS DETAILS (Please refer instruction B at the end) Same as above mentioned address (In such cases address details as below need not be provided I. Certified copy of OVD or equivalent e-document of OVD or OVD obtained through digital KYC process needs to be submitted (anyone of the following OVDs) A-Passport Number B-Voter ID Card VX04DFXXXX W C G 8 8 7 X X X C-Driving Licence D-NREGA Job Card E-National Population Register Letter F-Proof of Possession of Aadhaar No need to attach. Aadhaar card. If submitted, Aadhaar Number to be masked by the customer E-KYC Authentication No need to attach. Aadhaar card. If submitted, Aadhaar Number to be masked by the custome Offline verification of Aadhaar No need to attach. Aadhaar card. If submitted, Aadhaar Number to be masked by the custome IV Deemed Proof of Address – Document Type code

Address

Important Instructions:

B. Tick "wherever applicable.

required to be updated.

For office use only

Maiden Name

Mother Name

Date of Birth\*

Marital Status

Residential Status'

A-Passport Number

C-Driving Licence

D-NREGA Job Card

E-KYC Authentication

✓ B-Voter ID Card

Citizenship'

Gender\*

PAN\*

Line 1<sup>s</sup> Line 2

Line 3

District\*

Father / Spouse Name'

Line 2

2 1 8 MUKHERJEE PARA ROAD Line 1\* City/Town/Village\* Line 3 NORTH 24 PGS Pin/Post Code\* 7 4 3 1 2 5 W B ISO 3166 Country Code\* State code

4. Contact	Details (All communications will be sent to Mobile number/Email-	ID provided including for validation purpose) (Please refer instruction <b>C</b> at the end)
Tel. (Off)	Tel. (Res)	Mobile 8 9 7 X X X X 1 4 7
Email ID ASH	OKSIN87XX@GMAIL.COM	
*mandatory and subjec	to validation, hence provide the valid information in legible manner	
5. Remark	s (If any)	
		AT ULTA
6. Applicant D	eclaration	
I hereby declare the of legislation or an analysis of legislation or an address. I hereby consent the address. I also performed the infract/Rules/SEBI guident.  Date: 150 100    150 100	Place: KOLKATA  For Office Use only	y from time to time In the above registered number/email In the above registered numb
15	Equivalent e-document Video Based KYC	Leading the state of the state
K	YC documents verification carried out by	Institution details
Date:	DD - MM - YYYY	Name
Emp. Name		Code
Emp. Code		
Emp. Designation		
Emp. Branch	[Employee Signature]	[Institution Stamp]
In	-Person Verification (IPV) carried out by	Institution details
Date:	DD-MM-YYYY	
Emp. Name		
Emp. Code		
Emp. Designation		
Emp. Branch		
	[Employee Signature]	[Institution Stamp]









#### **Declaration for Standalone KYC processing**



ASHOK SINGH	_ having PA	N FGSPKXXXX	kxhereby
state and confirm that I am planning to invest in scheme(s) or already having investment in Folio		MC Name as per the choice of Investment  XXXXXX If having any previous Invest	iviutuai i uiiu
n Mutual Fund and accordingly as per the state form with applicable supporting documents for n the above mentioned Fund.	•		• •
	(		
5,0		SAFFOLLYAND	Paul 2th.
		Sign	ature

Note: PAN, Name, Signature in this declaration form should match with Signature in KYC application form, else it will be liable to get rejected.





#### Form for Fresh Nomination / Change of Existing Nomination/ Cancellation of Nomination

Applicable for Individual Unitholders only - whether holding Units Singly or Jointly with other holders
Please read the instructions carefully before filling up this form

Nam	te of 1st Holder ASHOK SINGH	
	te of $2^{\mathrm{nd}}$ Holder KARISHMA SINGH Fill this details if there is	any Joint Holder
Nam	ne of 3 <sup>rd</sup> Holder	
☑ No in the	e, the above named Unitholders of SBI Mention the AMC Nominate the person(s) more particularly described hereunder to receive event of my / our death and/or	ve the Units held my/our Folio/s listed below
	ancel the nomination(s) made by me / us previously in respect of the use whichever is applicable).	nits held by me/ us in the Folio/s listed below
	Scheme Name	Folio No.
1.	SBI EQUITY HYBRID FUND	13305471
2.	SBI SMALL CAP FUND	10874125
3.	SBI LONG TERM EQUITY FUND	13305471
4.		La Carrie III.
		Salvi dalbi
	te of the Jominee AKASH SINGH	% of Allocation
PAN	N of the Nominee/Guardian*	Date of Birth of Nominee* 10-12-2006
		ou want to add 2 nominee then it will be 50% or else 100%
Guar	rdian's Relationship with Nominee	Guardian Tick the relation of yourself with Nominee
Proo	of of relationship 🗹 Birth Certificate 🗆 School Leaving Certificate 🗀	l Passport □ Others
	ress 5/2/8 MUKHERJEE PARA ROAD KOLKATA State WEST B	ENGAL PIN 743125
$2^{\rm nd}$ N	ne of the Nominee ANYA SINGH	% of 50% Allocation
COLUMN DE PROPERTIES DE COLUMN DE CO	V of the Nominee/Guardian*	Date of Birth of Nominee* 31-05-2015 / Y Y
	e of the Guardian * ASHOK SINGH	Engowering Foot Party for Massina
	rdian's Relationship with Nominee  Mother  Father  Legal	
	of of relationship 🗹 Birth Certificate 🗆 School Leaving Certificate 🗆	l Passport □ Others
Addı	ress 5/2/8 MUKHERJEE PARA ROAD	
City	KOLKATA State WEST B	ENGAL PIN 743125
	ne of the Mention here if you want to opt for 3rd Nominee	% of
	Jominee Jof the Nominee/Guardian*	Allocation  Date of Birth of Nominee*
Name	e of the Guardian *	amriddhi
Guar	rdian's Relationship with Nominee	Guardian
Proo	of of relationship □ Birth Certificate □ School Leaving Certificate □	l Passport □ Others
Addı		<del>-</del>
City	State	PIN
	plicable in case the Nominee is a Minor. (Also, please attach a copy	
	/We <b>DO NOT</b> wish to make a nomination. (Please tick ✓ if the unith	
	ampiddhi	
	e have read and understood the instructions on nomination given below by the same. The instructions contained herein supercedes all previous	
	olio(s) mentioned above.	ous nominations made by me/us in respect of

Signature of the 2nd unitholder

Signature of the 3rd unitholder

Signature of the 1st unitholder

#### PAN based Email Id / Mobile No. Updation Form



seal & sign

	( AFFOL	LYA-o.	Engoneing City, Veng to recumo	
First / Sole Holder PAN	HQNPFXXX	V		
Investor Name	ASHOK SINGH			
Updation of new co	ontact details Confirmation	on of existing contact details / family decl	aration	
☐ CONFIRMATION / U	PDATION OF EMAIL ADDRESS IN A	AFORESAID FOLIO(S)		
Email Address	ashoksin87XX@gmail.	.COM If you want to update Mail ID		
Email address specified	above belongs to self or family, due	to investor being (Please tick any one op	tion from below)	
Self	☐ Sp	pouse		
Guardian (for Min	or investment)	ependent Children		
Dependent Parer	ts De	ependent Siblings	ASSOLIVA-	
☐ POA	□ PI	MS	ackiddhi	
Custodian			Empowering Chr., Penny to Varienul	
☐ CONFIRMATION / U	PDATION OF MOBILE NUMBER IN	AFORESAID FOLIO(S)		
Mobile Number	897XXXX147 If you want to	to update Mail ID		
Mobile number specified	d above belongs to self or family, du	ue to investor being (Please tick any one o	option from below)	
Self	Sp.	pouse		
Guardian (for Min	or investment)	ependent Children		
<ul><li>Dependent Parer</li></ul>	ots De	ependent Siblings		
☐ POA	☐ PN	MS AFFOLLY.		
Custodian		acriddh transming françisma y na man		
Contact Number (Ph	one - Office)			
Contact Number (Ph	one - Residence)			
Please update KYC S	tatus in all my folios (Please enclose p	proof of KYC verification)		
UNIT HOLDER(S) SIGNA	ATURE(S) & DECLARATION			
		ds folio(s) serviced by CAMS, where I am the holder o	of the mentioned PAN	
and also the First Holder. Thi	s request may kindly be treated as the necessa	ary authorization in this regard.		
Signature of Sole			Third Unit-holder	
VI .	(10 be signed by All Unit-hold	ders if Mode of Holding is Joint)		
L ~	Acknowled			
Received from: <b>ASH</b>	OK SINGH			
PAN: HQNPFXXXX	V		Official Collection	
Updation of Femail id: ashoksin87XX@gmail.com				
			of Acceptance	

Mobile No. 897XXXX147 Home / Office Phone No. \_\_\_\_\_ KYC status

#### **Email id / Mobile number updation Form**



Mutual Fund Name	SBI Specify the AMC Name	First / Sole Holder PAN HQNPFXXXXV						
Folio Number(s)	1047896541 Enter the Fol	(io name given at Statement						
Confirmation of e	Confirmation of existing contact details / family declaration  Updation of new contact details							
First Holder Name	ASHOK SINGH							
Joint Holder 1 Name	KARISHMA SINGH Fill this	s details if there is any Joint Holder						
Joint Holder 2 Name	Service	TO THE PARTY OF TH						
CONFIRMATION / UPI	DATION OF EMAIL ADDRESS IN AFO	PRESAID FOLIO(S)						
Email Address	ashoksin87XX@gmail.d	COM If you want to update Mail ID						
Email address specified above belongs to Self or family, due to investor being (Please tick any one option from below)  Spouse Guardian (for Minor investment) Dependent Children Dependent Parents Dependent Siblings								
CONFIRMATION / UPL	DATION OF MOBILE NUMBER IN AFC	JRESAID FOLIO(S)						
Mobile Number	897XXXX147 If you want to	update Mail ID						
Mobile number specified  Spouse  Guardian (for Mi  Dependent Child  Dependent Parel  Dependent Siblin	nor investment) ren nts	, due to investor being (Please tick any one option from below)						
UNIT HOLDER(S) SIGN	NATURE(S) & DECLARATION	AFFOLLYA-a						
	to update the following Service Request in all for st holder. This letter may kindly be treated as th	folios across all Mutual Funds serviced by KFINTECH, where I am the holder ne necessary authorization in this regard.						
ATURE(S)	and 2th.							

Signature of Third Unit-holder

(To be signed by All Unit-holders if Mode of Holding is Joint)

investo	r Details				
1st Holder: AS	HOK SINGH				AFFOLLYA
Mother's Name	: LILAWATI D	)EVI			Empowering Every Penny for Mankir
	ARISHMA SIN		or Eighther or Survivor		
Mother's Name	SITA DEVI				
3 <sup>rd</sup> Holder:					
Mother's Name	;				
Mode of Holdin	g: Single (	Eighth	er or Survivor (	Join	t Choose any o
Nominee Name	with Relation : .!	LILAWATI D	EVI (Mother)	lomination is Manda	atory in MF
Mobile No.: 1)	897XXXX147	7	2)		
Email ID : ash	oksin87XX@g				
Profession : Se	ervice		Annual Income	3-5 Lacs	
Marital Status :	Married (	) Single (		la c	
Mandate Type :	Physical (	E-Ma		te is faster, safe, Online / net ber rejection rate than physical. (	
Mandate Amou	nt / Limit :	₹ 10 Lacs/ ₹	15 lacs		A SECO MA
			10 1400		
Investm	ent Det	ails			
Scheme Name	& Option SC	CHEME NAI	ME	<i>y</i>	
Mode	Lumpsum	SIP	SWP	STP	Date
Amount					
Tenure					
Cummant years D	**F	ILL THE INVES	TMENT DETAILS	YOU NEED TO	START AS
Suggest your R	errences .	(			
Name		Contact No	. amplicant	Profes	ssion
•					
•					
	nust be different o ered for Future Tra				FFOLLYA-o.
Mhun Quest	2#				
Investor Sia	nature		5000	Wealth Coach	Signature

Get the App (Safollya Investment) and Invest hassle free with Us

EQUITY				RISK CATEGORY	IDEAL TIME HORIZON	EXIT LOAD	EXPECTE IRR
MARKET CAPITAL BASED	LARGE C.	MID C.	SMALL C.				
LARGE CAP	80%			High	5 Years	10%	10%
LARGE CAP & MID CAP	35%	35%		High	6 Years	10%	12%
MID CAP		65%		High	7 Years	10%	12%
SMALL CAP			65%	Very High	8 Years	10%	14%
MULTI CAP	25%	25%	25%	High	6 Years	10%	13%
FLEXI CAP		65%	AFFOLL	High	6 Years	10%	13%
			Exposuring Coxy Pariny for N	bi Lumbed			
DIVIDEND YIELD	65%		d Yielding	High	5 Years	10%	10%
VALUE	65%		nvesting	Very High	7 Years	10%	11%
CONTRA	65%		n Investing	Very High	7 Years	10%	12%
FOCUSED FUNDS	65%		Companies	High	6 Years	10%	12%
SECTOR/ THEMETIC	80%	Particular S	Sector/Theme		3 Yrs. Positional	10%	20%
Transvetting Transviton Managed	80%	3 yrs l	Holding	High	6 Years	10%	12%
DEBT				RISK CATEGORY	IDEAL TIME HORIZON	EXIT LOAD	EXPECTI IRR
MATURITY BASED	MINIMUM	MAXIMUM					
OVERNIGHT		1 Days	"TIME HAS THE	Very Low	7 Days	0%	3%
LIQUID		91 Days	POWER TO	Very Low	60 Days	1%	4%
ULTRA SHORT DURATION	3 Months	6 Months	REDUCE	Low	180 Days	1%	5%
LOW DURATION	6 Months	12 Months	RISK IN	Low-Medium	2 Years	5%	5.5%
MONEY MARKET		1 Years		Very Low	60 Days	1%	4%
SHORT DURATION	1 Year	3 Years	INVESTMENT	Low-Medium	2 Years	2%	6%
MEDIUM DURATION	3 Years	4 Years	& TO CREATE	Medium	4 Years	5%	7%
EDIUM TO LONG DURATION	4 Years	7 Years	WEALTH"	Medium	5 Years	5%	7%
LONG DURATION	7 Years		-ARABINDA KUNDU	Medium	6 Years	5%	7%
OTHERS							
DYNAMIC BOND	-	cross Duratio	ns	Medium	3 Years	5%	7%
CORPORATE BOND	Min 8	0% in high Ra	ted CB	Low	90 Days	1%	<b>7</b> %
CREDIT RISK	Min 65% i	n Corp Bonds,	<highrated< td=""><td>Low-Medium</td><td>3 Years</td><td>5%</td><td>6.5%</td></highrated<>	Low-Medium	3 Years	5%	6.5%
GILT		Min 80% in Gse	ec	Very High	5 Years	10%	7.5%
ILT WITH 10 YRS DURATION	Min 80	% in Gsec, MD	= 10 yrs	Very High	7 Years	10%	7.5%
FLOTER	Min	65% in Floting	Rate	Very Low	90 Days	0.5%	5.5%
BANKING & PSU	Min 80% in D	ebt of Bank,P	SU, Public FLs	Low	180 Days	1%	6%
HYBRID	hi hi			RISK CATEGORY	IDEAL TIME HORIZON	EXIT LOAD	EXPECTI IRR
EQUITY-DEBT MIX BASED	EQUITY	DEBT					
CONSERVATIVE	10-25%	75-90%	1	Medium	3 Years	5%	9%
BALANCED	40-60%	40-60%	1 .	Medium-High	5 Years	10%	10%
AGGRESSIVE	65-80%	20-35%		Medium-High	5 Years	10%	11%
ARBITRAGE	Min 65%	Balance	i (° C	Low	1 Year	1%	5%
EQUITY SAVINGS	Min 65%	Min 10%		Medium	4 Years	5%	8%
OTHERS							
DYNAMIC AST.ALLOCATION	Dyr	namically Man	aged	Medium-High	5 Years	10%	10%
		-	bt),Min 10 % in each	Medium-High	5 Years	10%	10%
OTHERS							
INDEX ETF	Min 95%	6 in Securities	of Index	High	7 Years	10%	As Inde
	Pooled Inves	tment - Overs	eas+Domestic				
FUND OF FUNDS			DI LED LE				
FUND OF FUNDS SOLUTION ORIENTED	LOCK-IN	OR EA	RLIER IF				
	LOCK-IN 5 Years		rment	Medium-High	5y or 55 age	10%	11%

Wealth Signature



#### **ENGAGE – EMERGE - EVOLVE**

#### Dear clients OR wealth coaches OR Relationship Managers,

Please save this single Contact No (SAMADHAN DIL SE):

#### **MUTUAL FUND**

- FINANCIAL TRANSACTION
- NON-FINACIAL TRANSACTION
- KYC / BANK MANDATE STATUS
- MOBILE APP OR LOGIN CREDENTIALS
- All KYC or Mandate Documents (Soft copy)
- Any Kind of reports.

#### **HEALTH INSURANCE**

- CLAIM INTIMATION
- RENEWAL
- PORTABILITY
- MOBILE APP OR LOGIN CREDENTIALS
- NO-CLAIM HEALTH CHECK UP
- All KYC other Documents (Soft copy)

#### 89021 87782

(SMS / Whatsapp only) - No Call mail: care@saffollya.com

#### LIFE INSURANCE

- CLAIM INTIMATION
- RENEWAL
- LOAN / SURRENDER
- LICI LOGIN CREDENTIALS
- IT REPORT
- All KYC or Other Documents (Soft copy)

#### **OTHER PRODUCTS**

- NPS, CO. DEPOSIT, CAPITAL GAINS BONDS.
- All documentation or any service required.

#### Note: awridabi

- 1. Any & All request will be entertained through posting request from Clients or respective Wealth Coaches form their regd mobile no of mail id only.
- 2. Respective RM (Relationship Manager are requested to assist clients or respective Wealth coaches to post <u>all request or query</u>.
- 3. Method of posting: TEXT, IMAGE, PDF OR RECORDED VOICE.

#### For any Complain on Non-Satisfactory service:

1<sup>st</sup> level Escalation: 89618 66009 2<sup>nd</sup> level Escalation: 93310 08884

Regards: Team Saffollya O Samriddhi

www.saffollya.com
Dated: 01.03.23

### \*SGL POINT ORDERS NO: 89021 87782\* (SMS OR Whatsapp only) - \*No Call\*

Mail: <a href="mailto:care@saffollya.com">care@saffollya.com</a>

TAT(Turn Around Time): (Other than Holiday and Sunday)
BEFORE 2.30 PM > SAME DAY, AFTER 2.30 PM > NEXT WORKING DAY.

#### \*MF Order Format:\* (Common part in all message)

**Starting part of message:** 

Client Name:

PAN:

WC or MFD Name:

Last part of message:

(Please CONFIRM THROUGH OTP OR ONLINE FORM CLIENT.)

\*To client from WC\* (for prior intimation)

Send the same order message to client &

Above Instructions given to execution team of our office. Pl accommodate with them on phone call.

For any further more clarification Pl inform me.

1. \*SIP\*

**SCHEME** -

OPTION – GR OR DIV Folio: Existing OR New

AMOUNT -

MODE - MLY OR QLY,

**Debit Date:** 

TENEURE: PERPETURAL OR yrs,
First Order Today (FOT) - WITH FOT OR

NOT FOT),

3. \*Lump Sum with SIP\*:

**SCHEME -**

OPTION – GR OR DIV

Lump sum amount:

Folio: Existing OR New

SIP: Mode – MLY, AMOUNT:

PERIOD: PERPETUAL, DEBIT DT:

2. \*Lump sum investment\*:

**SCHEME-**

OPTION - GR OR DIV

Folio: Existing OR New

AMOUNT - .

4. \*Lump Sum with SWP\*:

SCHEME -

**OPTION – GR OR DIV** 

**Lump sum amount:** 

Folio: Existing OR New

SWP: Mode – MLY, AMOUNT:

, PERIOD : PERPETUAL, SWP DT :



5. \*SIP cancellation\*: 6. \*Additional Purchase\*: **SCHEME -EXISTING SCHEME-**OPTION – GR OR DIV **OPTION – GR OR DIV** Folio No.: **FOLIO NO.:** SIP: Mode – MLY, AMOUNT: AMOUNT: **DEBIT DT:** Note\*\*Other than SOS clients Physical cancellation form required. 7. \*SWP Regd. OR Cancellation\* 8. \*STP Registration\*: **SCHEME -**SOURCE SCHEME: ..... OPTION - GR OR DIV FOLIO No. Folio No.: **SWP: Mode – MLY, AMOUNT:** TARGET SCHEME: ...... , PERIOD : PERPETUAL, SWP DT : **Per Transfer AMOUNT:** FREQUENCY: DLY OR WLY OR MLY NO. OF INSTALMENT: 9. \*Switch transaction\* 10. \*Redemption:\* **SCHEME NAME:** SOURCE SCHEME: ..... **FOLIO No.** FOLIO No. AMOUNT: .... OR UNIT: ....../ALL UNIT TARGET SCHEME: ...... AMOUNT: .....OR UNIT (All / Nos) **Complain intimation:** To CC / Management of SOS: **Complain Type:** Transaction – SIP / SWP/ Purchase / Switch Regulatory services: KYC / Mandate / Nominations, Contact details Reports: Brokerage details / File System: logging, mobile app, sos frame In against of (mention name if wish to) Attachment (as proof, not mandatory) Other comment: Complain dated:



# Forms should be printed for 1st time Client Registration

- **SE Mandate Form** 
  - **Ø BSE AOF Form** 
    - **<b>KYC** Form
- **⊗** Declaration of KYC
- **⊗** Nomination Form
- **⊘ PAN Base Request Form** 
  - **⊗** Email/ Mobile Updation
    - **⊗** Investor Details Form





NACH/ECS/AUTO DEBIT MANDATE INSTRUCTION FORM Tick (, \( \( \( \( \( \) \)))	Utility Code Date D D M M Y Y Y Y
	Utility Gode
CREATE I/We hereby authorize ICCL	to debit (tick 🗸 ) SB/CA/CC/SB-NRE/SB-NRO/Other
CANCEL Bank a/c number	
with Bank IFSC	or MICR
an amount of Rupees	₹
FREQUENCY Mthly Qtly H-Yrly Yrly As & when presented	DEBIT TYPE Fixed Amount / Maximum Amount
Reference 1 (Mandate Reference No.)	Phone No.
Reference 2 (Unique Client Code-UCC)	Email ID
I agree for the debit of mandate processing charges by the bank whom I am authorizing to debit my acc	count as per latest schedule of charges of the bank.
PERIOD —	
From D D M M Y Y Y Y	
To D D M M Y Y Y Y	
Or Until Cancelled 1 2	3
- This is to confirm that the declaration has been carefully read, understood & made by me/us. I am authorizing the user er	tity/ Corporate to debit my account, based on the instructions as agreed and signed by me.

- I have understood that I am authorised to cancel/amend this mandate by appropriately communicating the cancellation / amendment request to the User entity / Corporate or the bank where I have authorized the debit.

#### SAFFOLLYA O SAMRIDDHI LLP

1st applicant Signature:



Broker/Agent Code ARN: 137947 SUB-BROK		OKER:			EUIN:			
Unit Holder Information							1	
Name of the First Applicant :								
PAN Number :		KYC:		(1)	Date of Birth	:		
Father Name :		•			Mother Name	e :		
Name of Guardian :				Î	PAN:			
Contact Address :								
City: Pincode:				State	State : Country :			
City:								
Tel.(Off):	Tel.(Res):			Emai				
Income Tax Slab/Networth :	Fax (Res) :				upation Detail	S		
Place of Birth :		Country of Tax F	Pacidance					
Tax Id No. :		Country of Tax I	residence	•				
Politically exposed person / Rela	ated to Politic	ally exposed ners	on etc ?			Yes	No	
Mode of Holding:	rea to i oncio	any exposed pers	on etc		Occupation :		1110	
Name of Second Applicant :					occupation.	((		
PAN Number :		KYC:		_	Date of Birth			
Income Tax Slab/Networth :					Occupation D	60		
Place of Birth :		Country of Tax F	Residence	:				
Tax Id No. :								
Politically exposed person / Rela	ated to Politic	ally exposed pers	on etc.?			Yes	No	
Name of Third Applicant :						140.000	**************************************	
PAN Number :		KYC:			Date of Birth :			
Income Tax Slab/Networth :					Occupation D	Details		
Place of Birth :		Country of Tax F	Residence	::				
Tax Id No. :		4.						
Politically exposed person / Rela	ted to Politic	ally exposed pers	on etc.?			Yes	No	
Other Details of Sole/ 1st Appli	cant							
Overseas Address :								
(In case of NRI investor)								
City:	Pincode :				Country:			
Bank Mandate Details								
Name of Bank :				Branch:				
A/C No. :		A/c Type :			IFSC Code:			
Bank Address :								
City:	Pincode :				State :		Country:	
Nomination Details								
Nominee Name :				Relationship :				
Guardian Name (If Nominee is N	Лinor) :				25			
Nominee Address :								
City:	Pincode :				State :			
Declaration and Signature								
I/We confirm that details provided								
form of trail commission or any oth			different o	ompe	eting Schemes o	of various Mu	utual Fund From	
amongst which the scheme is being	recommended	d to me/us.						
Date : Place :								
Learners (SECTIA)								

2nd applicant Signature :

3rd applicant Signature :

	VV	Contained (ICVC) Application Forms Healthideal	
Important Instructions:	Know You	Customer (KYC) Application Form   Individual	
<ul> <li>A. Fields marked with '*' are ma</li> <li>B. Tick "wherever applicable.</li> <li>C. Please fill the form in English</li> <li>D. Please fill the date in DD-MM</li> <li>E. For particular section update section number and strike of required to be updated.</li> </ul>	and BLOCK letters. I-YY format. , please tick () in the box	<ul> <li>F. Please read section wise detailed guide</li> <li>G. List of State/U.T code as per Indian Motor Vehicle Act, 1988 is available.</li> <li>H. List of two character ISO 3166 country codes is available at the end.</li> <li>I. KYC number of applicant is mandatory for update application.</li> <li>J. The 'OTP based E-KYC' check box is to be checked for accounts ope OTP based E-KYC in non-face to face mode</li> </ul>	
For office use only	Application Ty	e* New Update	
(To be filled by financial institution	on) KYC Number	(Mandato	ory for KYC update request)
uu Neessen 1991 järkivatti säärikäätänäätä 🗲 1900 tiluksi tulksistäätää kirja tulksistä tiloitta ja k	Account Type*	Normal Minor Aadhaar OTP based E-KYC (in no	on-face to face mode)
1. Personal Details	(Please refer instru	ction A at the end)	
-	Prefix	First Name Middle Name	Last Name
Name* (Same as ID proof)			
Maiden Name			
Father / Spouse Name*			
Mother Name			
Date of Birth*	D D - M M - Y	YYY	
Gender*	M- Male	F- Female T- Transgender	
PAN*		FORM 60 furnished	
Marital Status*	Married	Unmarried Others	
Citizenship*	☐ IN- Indian	Others – Country Countr	y Code
Residential Status*	Resident Individual	☐ Non Resident Indian ☐ Foreign National ☐ Person of Ind	ian Origin
2. PROOF OF IDEN	ITITY AND ADDRES	SS* (Please refer instruction <b>B</b> at the end)	
Certified copy of OVD or equivalent	ent e-document of OVD or	OVD obtained through digital KYC process needs to be submitted (anyon	e of the following OVDs)
A-Passport Number		Passport Expiry Date DD - MM - YYYY	PHOTO*
B-Voter ID Card			PHOTO
C-Driving Licence		Driving Licence Expiry Date DD - MM -	YYYY
D-NREGA Job Card			
E-National Population Re	egister Letter		
F-Proof of Possession of	Aadhaar No need to attac	. Aadhaar card. If submitted, Aadhaar Number to be masked by the customer	
II E-KYC Authentication	No need to attack	Aadhaar card. If submitted, Aadhaar Number to be masked by the customer	
III Offline verification of Aad	AV-80-5011-2-50-30-30-30-30-30-30-30-30-30-30-30-30-30	Aadhaar card. If submitted, Aadhaar Number to be masked by the customer	Signature /Thumb Impressio
Address [For other than residen			across photo without coverin the face
Line 1*			
Line 2			
Line 3		City/Town/Villa	age*
District*		Pin/Post Code* State/U.T Code*	SO 3166 Country Code*
3. CURRENT ADDR	RESS DETAILS (Ple	ase refer instruction <b>B</b> at the end)	
	00007 88 88 9	dress details as below need not be provided	
I. Certified copy of OVD or equiv	ralent e-document of OVD	or OVD obtained through digital KYC process needs to be submitted (any	one of the following OVDs)
A-Passport Number			
B-Voter ID Card			
C-Driving Licence			
D-NREGA Job Card			
E-National Population Re	egister Letter		
F-Proof of Possession of	37	eed to attach. Aadhaar card. If submitted, Aadhaar Number to be masked by the customer	
II E-KYC Authentication		seed to attach. Aadhaar card. If submitted, Aadhaar Number to be masked by the customer	
III Offline verification of Aad		red to attach. Aadhaar card. If submitted, Aadhaar Number to be masked by the customer	
IV Deemed Proof of Address		The second of th	
	5 Document Type code		
Address Line 1*			

Pin/Post Code\*

City/Town/Village\*

State code

ISO 3166 Country Code\*

Line 2

Line 3

☐ 4. Contac	Details	s (All	comn	nunio	catio	ons v	vill t	oe s	ent to	Mo	oile	numb	er/Er	nail-l	U pri	ovide	a inc	luai	ing fo	or va	ında		Pall		50.7		0.10	ieri	nstr	uctic	on C a	at the	e en
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#### **Declaration for Standalone KYC processing**

l,	having PAN	hereby
state and confirm that I am pl	anning to invest in	Mutual Fund
scheme(s) or already having ir	nvestment in Folio No	
	ly as per the stated requirements, I am sub ng documents for completing the KYC inves	•
		Signature

<u>Note:</u> PAN, Name, Signature in this declaration form should match with Signature in KYC application form, else it will be liable to get rejected.

#### Form for Fresh Nomination / Change of Existing Nomination/ Cancellation of Nomination

Applicable for Individual Unitholders only - whether holding Units Singly or Jointly with other holders Please read the instructions carefully before filling up this form

Name of 1st Holder		
Name of 2 <sup>nd</sup> Holder		
Name of 3 <sup>rd</sup> Holder		
I/We, the above named Unitholders of ☐ Nominate the person(s) more particular in the event of my / our death and/or ☐ Cancel the nomination(s) made by me / (tick whichever is applicable).  Scheme Name		
1.		
2.		
3.		
4.		
Name of the		% of
1st Nominee		Allocation
PAN of the Nominee/Guardian*	Date of	Birth of Nominee* DD/MM/YYYY
Name of the Guardian * Guardian's Relationship with Nominee    © 1	Mother Dether Diegel Guardien	
	· ·	
Proof of relationship  Birth Certificate	☐ School Leaving Certificate ☐ Passport	U Otners
Address City	State	PIN
Name of the		% of
2 <sup>nd</sup> Nominee		Allocation
PAN of the Nominee/Guardian*	Date of	Birth of Nominee* DD/MM/YYYY
Name of the Guardian *		
Guardian's Relationship with Nominee [	•	
Proof of relationship  Birth Certificate	☐ School Leaving Certificate ☐ Passport	☐ Others
Address		
City	State	PIN
Name of the		% of
3 <sup>rd</sup> Nominee	D : 6	Allocation
PAN of the Nominee/Guardian*  Name of the Guardian *	Date of	Birth of Nominee* DD/MM/YYYY
Guardian's Relationship with Nominee [	Mother Deather Diagol Guardian	
•	_	C Oth are
Proof of relationship ☐ Birth Certificate Address	□ School Leaving Certificate □ Passport	Li Others
a radioss		
City	State	PIN
*applicable in case the Nominee is a Mine	or. (Also, please attach a copy of the min	or's birth certificate)
☐ I/We <b>DO NOT</b> wish to make a nomina	ation. (Please tick $\sqrt{\ }$ if the unitholder does	not wish to nominate anyone)
I/We have read and understood the instructions abide by the same. The instructions contain the folio(s) mentioned above.	ned herein supercedes all previous nomina	ations made by me/us in respect of
Signature of the 1st unitholder	Signature of the 2nd unitholder	Signature of the 3rd unitholder

#### **Instructions**

- 1. The nomination can be made only by individuals applying for/holding units on their own behalf singly or jointly.
- 2. Non-individuals including a Society, Trust, Body Corporate, Partnership Firm, Karta of Hindu undivided family, a Power of Attorney holder and/or Guardian of Minor unitholder *cannot* nominate.
- 3. Nomination is not allowed in a folio of a Minor unitholder.
- 4. If the units are held jointly (i.e., in case of multiple unitholders in the folio), all joint holders need to sign the Nomination Form (even if the mode of holding/operation is on "Anyone or Survivor" basis).
- 5. A minor may be nominated. In that event, the name and address of the Guardian of the minor nominee needs to be provided.
- 6. Nomination can also be in favour of the Central Government, State Government, a local authority, any person designated by virtue of his office or a religious or charitable trust.
- 7. The Nominee shall not be a trust (other than a religious or charitable trust), society, body corporate, partnership firm, Karta of Hindu Undivided Family or a Power of Attorney holder.
- 8. A Non-Resident Indian may be nominated subject to the applicable exchange control regulations.
- 9. **Multiple Nominees**: Nomination can be made in favour of multiple nominees, subject to a maximum of three nominees. In case of multiple nominees, the percentage of the allocation/share should be in whole numbers without any decimals, adding upto a total of 100%. If the total percentage of allocation amongst multiple nominees does not add up to 100%, the nomination request shall be treated as invalid and rejected. If the percentage of allocation/ share for each of the nominee is not mentioned, the allocation /claim settlement shall be made equally amongst all the nominees.
- 10. Every new nomination for a folio/account shall overwrite the existing nomination, if any.
- 11. Nomination made by a unit holder shall be applicable for units held in all the schemes under the respective folio / account.
- 12. Nomination shall stand rescinded upon the transfer of units.
- 13. **Death of Nominee/s**: In the event of the nominee(s) pre-deceasing the unitholder(s), the unitholder/s is/are advised to make a fresh nomination soon after the demise of the nominee. The nomination will automatically stand cancelled in the event of the nominee(s) pre-deceasing the unitholder(s). In case of multiple nominations, if any of the nominee is deceased at the time of death claim settlement, the said nominee's share will be distributed equally amongst the surviving nominees.
- 14. Transmission of units in favour of a Nominee shall be valid discharge by the asset management company/ Mutual Fund / Trustees against the legal heir(s).
- 15. **Cancellation of Nomination:** Request for cancellation of Nomination made can be made only by the unitholders. The nomination shall stand rescinded on cancellation of the nomination and the AMC shall not be under any obligation to transfer / transmit the units in favour of the Nominee.
- 16. Unitholders who do not wish to nominate are required to confirm the same by indicating their choice in the space provided in the nomination form.
- 17. The nomination will be registered only when this form is completed in all respects to the satisfaction of the AMC.
- 18. In respect of folios/accounts where the Nomination has been registered, the AMC will not entertain any request for transmission / claim settlement from any person other than the registered nominee(s), unless so directed by any competent court.

\*\*\*\*

#### PAN based Email Id / Mobile No. Updation Form



First / Sole Holder PAN	
Investor Name	
Updation of new contact details Confirmation of existing contact details / family declarat	ion
CONFIRMATION / UPDATION OF EMAIL ADDRESS IN AFORESAID FOLIO(S)	
Email Address	
Email address specified above belongs to self or family, due to investor being (Please tick any one option	from below)
☐ Self ☐ Spouse	
Guardian (for Minor investment) Dependent Children	
☐ Dependent Parents ☐ Dependent Siblings	
□ POA □ PMS	
Custodian	
☐ CONFIRMATION / UPDATION OF MOBILE NUMBER IN AFORESAID FOLIO(S)	
Mobile Number	
Mobile number specified above belongs to self or family, due to investor being (Please tick any one option	on from below)
Please update KYC Status in all my folios (Please enclose proof of KYC verification)	
UNIT HOLDER(S) SIGNATURE(S) & DECLARATION  I / We authorize CAMS to update this Service Request in all the Mutual Funds folio(s) serviced by CAMS, where I am the holder of the and also the First Holder. This request may kindly be treated as the necessary authorization in this regard.	mentioned PAN
Signature of Sole / First Unit-holder  Signature of Second Unit-holder  Signature of Third  (To be signed by All Unit-holders if Mode of Holding is Joint)	l Unit-holder
Acknowledgement Slip	
Received from:	Official
PAN:	Collection
Updation of  Email id:	Center / Point of Acceptance
☐ Mobile No ☐ Home / Office Phone No ☐ KYC status	seal & sign

#### **Email id / Mobile number updation Form**



Mutual Fund Name			First / Sole Holder PA	AN					
Folio Number(s)									
Confirmation of e	xisting contact det	ails /	Updation of nev	v contact	detail	S			
First Holder Name									
Joint Holder 1 Name									
Joint Holder 2 Name									
CONFIRMATION / UPI	DATION OF EMAIL	ADDRESS IN AF	ORESAID FOLIO(S)						
Email Address									
Email address specified  Spouse  Guardian (for Mi Dependent Child Dependent Pare  Dependent Sibli	inor investment) dren nts	Self or family	, due to investor being	(Please t	tick an	y one opt	ion fro	om be	elow)
CONFIRMATION / UPI	DATION OF MOBIL	E NUMBER IN A	FORESAID FOLIO(S)						
Mobile Number									
Mobile number specifie  Spouse  Guardian (for M Dependent Child Dependent Pare Dependent Sibli	inor investment) Iren nts	Self or famil	y, due to investor bein	g (Please	tick a	ny one op	tion fr	rom b	pelow)
UNIT HOLDER(S) SIG	NATURE(S) & DECI	LARATION							
	,	·	folios across all Mutual Fund the necessary authorization i		•	ECH, where	I am th	e holde	er
Signature of Sol			of Second Unit-holder			ure of Third	Unit-hc	older	
SIC	(To be	signed by All Unit-ho	lders if Mode of Holding is Jo	oint)					

nvesto	r Details				
1 <sup>st</sup> Holder:					AFFOLLYA amriddhi
Mother's Name	e :				Empowering Every Penny for Manking
2 <sup>nd</sup> Holder:					
Mother's Name	e :				
3 <sup>rd</sup> Holder:					
Mother's Name	e :				
Mode of Holdin	ng: Single (	Eighthe	er or Survivor (	) Join	t ()
Nominee Name	e with Relation :				
Mobile No.: 1)			2)		
Email ID:					
Profession:			Annual Income	<u> </u>	
Marital Status	: Married (	) Single (			
Mandate Type	: Physical	E-Ma	ndate ()		
Mandate Amou	ınt / I imit ·				
nvestn	nent Det	ais			
Scheme Name	& Option				
Mode	Lumpsum	SIP	SWP	STP	Date
Amount					
Tenure					
Suggest your P	refrences ** :				
Name		Contact No.		Profes	ssion
•		Contact 140			JUIUII
Wealth Coach Notes	<b>S.</b>				
Investor Sig	gnature			Wealth Coach	Signature

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Value Contraria Max 30 Particular 9	POWER TO REDUCE RISK IN INVESTMENT & TO CREATE WEALTH" -ARABINDA KUNDU Ons ated CB , SHighrated ec	High High High Very High High High High Very High Very High Very High High Very High High V. Very High High V. Very High High Wery Low Low Low Low Low-Medium Medium Medium Medium Medium Medium Medium Very High Low Low-Medium Very Low	5 Years 6 Years 7 Years 8 Years 6 Years 6 Years 5 Years 7 Years 7 Years 7 Years 6 Years 3 Yrs. Positional 6 Years  IDEAL TIME HORIZON  7 Days 60 Days 180 Days 2 Years 60 Days 2 Years 4 Years 5 Years 6 Years 3 Years 90 Days 3 Years	10% 10% 10% 10% 10% 10% 10% 10% 10% 10%	10% 12% 12% 14% 13% 13% 13% 10% 11% 12% 20% 12% 20% 12% 3% 4% 5% 5.5% 4% 6% 7% 7% 7% 7% 7%
Dividen Value Contraria Max 30 G Particular 9 3 yrs  MAXIMUM 1 Days 91 Days 6 Months 12 Months 1 Years 3 Years 4 Years 7 Years Across Duration 80% in high Rain Corp Bonds, Min 80% in Gs	25%  Ind Yielding Investing Investing Companies Sector/Theme Holding  "TIME HAS THE POWER TO REDUCE RISK IN INVESTMENT & TO CREATE WEALTH" -ARABINDA KUNDU  Ons Inted CB , SHighrated ec	High High Very High High High Very High Very High Very High Very High High V. Very High High V. Very High High V. Very Low Low Low Low Low Low Medium Medium Medium Medium Medium Medium Low Low Low Low Medium	6 Years 7 Years 8 Years 6 Years 6 Years 5 Years 7 Years 7 Years 6 Years 3 Yrs. Positional 6 Years  Therefore 7 Days 60 Days 180 Days 2 Years 60 Days 2 Years 4 Years 5 Years 6 Years 3 Years 6 Years	10% 10% 10% 10% 10% 10% 10% 10% 10% 10%	12% 12% 14% 13% 13% 13% 10% 11% 12% 20% 12% 20% 12% 3% 4% 5% 5.5% 4% 6% 7% 7% 7%
Dividen Value Contraria Max 30 G Particular 9 3 yrs  MAXIMUM 1 Days 91 Days 6 Months 12 Months 1 Years 3 Years 4 Years 7 Years Across Duration 80% in high Rain Corp Bonds, Min 80% in Gs	25%  Ind Yielding Investing Investing Companies Sector/Theme Holding  "TIME HAS THE POWER TO REDUCE RISK IN INVESTMENT & TO CREATE WEALTH" -ARABINDA KUNDU  Ons Inted CB , SHighrated ec	High Very High High High Very High Very High Very High High V. Very High High V. Very High High V. Very Low Low-Medium Very Low Low-Medium Medium Medium Medium Medium Medium Low Low-Medium Medium Medium Medium Low Low-Medium	7 Years  8 Years  6 Years  6 Years  7 Years  7 Years  7 Years  6 Years  3 Yrs. Positional  6 Years  IDEAL TIME HORIZON  7 Days  60 Days  180 Days  2 Years  60 Days  2 Years  4 Years  5 Years  6 Years  4 Years  5 Years  6 Years  90 Days	10% 10% 10% 10% 10% 10% 10% 10% 10% 10%	12% 14% 13% 13% 13% 10% 10% 11% 12% 20% 12% 20% 12% 5XPECTE 1RR 3% 4% 5% 5.5% 4% 6% 7% 7% 7% 7%
Dividen Value Contraria Max 30 0 Particular 9 3 yrs  MAXIMUM 1 Days 91 Days 6 Months 12 Months 1 Years 3 Years 4 Years 7 Years Across Duration 80% in high Rain Corp Bonds, Min 80% in Gs	25%  Ind Yielding Investing Investing Companies Sector/Theme Holding  "TIME HAS THE POWER TO REDUCE RISK IN INVESTMENT & TO CREATE WEALTH" -ARABINDA KUNDU  Ons Inted CB , SHighrated ec	Very High High High Very High Very High Very High High V. Very High High V. Very High High Very Low Low Low Low Low-Medium Medium Medium Medium Medium Medium Low Low Low Low Low Low-Medium	8 Years 6 Years 6 Years 7 Years 7 Years 6 Years 3 Yrs. Positional 6 Years  IDEAL TIME HORIZON  7 Days 60 Days 180 Days 2 Years 60 Days 2 Years 4 Years 5 Years 6 Years 6 Years	10% 10% 10% 10% 10% 10% 10% 10% 10% 10%	14% 13% 13% 13% 10% 11% 12% 12% 20% 12% 12% 3% 4% 5% 5.5% 4% 6% 7% 7% 7% 7%
Dividen Value Contraria Max 30 G Particular S 3 yrs  MAXIMUM 1 Days 91 Days 6 Months 12 Months 1 Years 3 Years 4 Years 7 Years Across Duration 80% in high Rain Corp Bonds, Min 80% in Gs	25%  Ind Yielding Investing Investing Companies Sector/Theme Holding  "TIME HAS THE POWER TO REDUCE RISK IN INVESTMENT & TO CREATE WEALTH" -ARABINDA KUNDU  Ons Inted CB , SHighrated ec	High High Very High Very High Very High V. Very High High V. Very High High V. Very High High Very Low Low Low Low Low Low-Medium Medium Medium Medium Medium Medium Low Low Low Low Low-Medium	6 Years 6 Years 7 Years 7 Years 6 Years 3 Yrs. Positional 6 Years IDEAL TIME HORIZON 7 Days 60 Days 180 Days 2 Years 60 Days 2 Years 4 Years 5 Years 6 Years 6 Years 3 Years 90 Days	10% 10% 10% 10% 10% 10% 10% 10% 10% 10%	13% 13% 13% 13% 10% 11% 12% 12% 20% 12% 12% 3% 4% 5% 5.5% 4% 6% 7% 7% 7% 7%
Dividen Value Contraria Max 30 G Particular S 3 yrs  MAXIMUM 1 Days 91 Days 6 Months 12 Months 1 Years 3 Years 4 Years 7 Years Across Duration 80% in high Rain Corp Bonds, Min 80% in Gs	Investing Invest	High  Very High  Very High  Very High  High  V. Very High  High  RISK  CATEGORY  Very Low  Low  Low  Low-Medium  Medium  Medium  Medium  Medium  Medium  Medium  Low  Low  Low  Low  Low  Low  Low-Medium	5 Years 7 Years 7 Years 6 Years 3 Yrs. Positional 6 Years  IDEAL TIME HORIZON  7 Days 60 Days 180 Days 2 Years 60 Days 2 Years 4 Years 5 Years 6 Years 6 Years 90 Days	10%  10%  10%  10%  10%  10%  10%  10%	13%  10%  11%  12%  20%  12%  20%  12%  3%  4%  5%  5.5%  4%  6%  7%  7%  7%  7%
Dividen Value Contraria Max 30 G Particular S 3 yrs  MAXIMUM 1 Days 91 Days 6 Months 12 Months 1 Years 3 Years 4 Years 7 Years Across Duration 80% in high Rain Corp Bonds, Min 80% in Gs	Investing an Investing Companies Sector/Theme Holding  "TIME HAS THI POWER TO REDUCE RISK IN INVESTMENT & TO CREATE WEALTH" -ARABINDA KUNDU  ons ated CB , SHighrated ec	High Very High High V. Very High High V. Very High High  RISK CATEGORY  E Very Low Very Low Low-Medium Very Low Low-Medium Medium Medium Medium Medium Medium Low Low-Medium Medium Medium Medium Low Low-Medium	5 Years 7 Years 7 Years 6 Years 3 Yrs. Positional 6 Years  IDEAL TIME HORIZON  7 Days 60 Days 180 Days 2 Years 60 Days 2 Years 4 Years 5 Years 6 Years 6 Years 3 Years 90 Days	10% 10% 10% 10% 10% 10% 10%  10%  10%	10% 11% 12% 12% 20% 12% 3% 4% 5% 5.5% 4% 6% 7% 7% 7%
Value Contraria Max 30 0 Particular 9 3 yrs  MAXIMUM 1 Days 91 Days 6 Months 12 Months 1 Years 3 Years 4 Years 7 Years Across Duration 80% in high Rain Corp Bonds, Min 80% in Gs	Investing an Investing Companies Sector/Theme Holding  "TIME HAS THI POWER TO REDUCE RISK IN INVESTMENT & TO CREATE WEALTH" -ARABINDA KUNDU  ons ated CB , SHighrated ec	Very High Very High High V. Very High High V. Very High High  RISK CATEGORY  Very Low Low Low Low-Medium Medium Medium Medium Medium Low Low Low-Medium Medium Medium Medium Medium Medium Low Low-Medium	7 Years 7 Years 6 Years 3 Yrs. Positional 6 Years  IDEAL TIME HORIZON  7 Days 60 Days 180 Days 2 Years 60 Days 2 Years 4 Years 5 Years 6 Years 6 Years 3 Years 90 Days	10% 10% 10% 10% 10% 10%  10%  10%  10%	11% 12% 12% 12% 20% 12% 12% 3% 4% 5% 5% 4% 6% 7% 7% 7%
Value Contraria Max 30 0 Particular 9 3 yrs  MAXIMUM 1 Days 91 Days 6 Months 12 Months 1 Years 3 Years 4 Years 7 Years Across Duration 80% in high Rain Corp Bonds, Min 80% in Gs	Investing an Investing Companies Sector/Theme Holding  "TIME HAS THI POWER TO REDUCE RISK IN INVESTMENT & TO CREATE WEALTH" -ARABINDA KUNDU  ons ated CB , SHighrated ec	Very High Very High High V. Very High High V. Very High High  RISK CATEGORY  Very Low Low Low Low-Medium Medium Medium Medium Medium Low Low Low-Medium Medium Medium Medium Medium Medium Low Low-Medium	7 Years 7 Years 6 Years 3 Yrs. Positional 6 Years  IDEAL TIME HORIZON  7 Days 60 Days 180 Days 2 Years 60 Days 2 Years 4 Years 5 Years 6 Years 6 Years 3 Years 90 Days	10% 10% 10% 10% 10% 10%  10%  10%  10%	11% 12% 12% 12% 20% 12% 12% 12% 12% 12% 12% 12% 12% 12% 12
Max 30 0 Particular 9 3 yrs  MAXIMUM 1 Days 91 Days 6 Months 12 Months 1 Years 3 Years 4 Years 7 Years Across Duration 80% in high Rain Corp Bonds, Min 80% in Gs	an Investing Companies Sector/Theme Holding  "TIME HAS THE POWER TO REDUCE RISK IN INVESTMENT & TO CREATE WEALTH" -ARABINDA KUNDU  ons ated CB , Highrated ec	Very High High V. Very High High RISK CATEGORY  Very Low Low Low-Medium Very Low Low-Medium Medium Medium Medium Medium Low Low-Medium Medium Medium Medium Medium Low Low-Medium	7 Years 6 Years 3 Yrs. Positional 6 Years  IDEAL TIME HORIZON  7 Days 60 Days 180 Days 2 Years 60 Days 2 Years 6 Years 5 Years 6 Years 6 Years	10% 10% 10% 10% 10% 10%  0% 11% 5% 11% 5% 5% 5% 5% 5%	12% 12% 20% 12% 12% 12% 12% 12% 12% 12% 12% 12% 12
Max 30 d Particular 9 3 yrs  MAXIMUM 1 Days 91 Days 6 Months 12 Months 1 Years 3 Years 4 Years 7 Years Across Duration 80% in high Rain Corp Bonds, Min 80% in Gs	Companies Sector/Theme Holding  "TIME HAS THE POWER TO REDUCE RISK IN INVESTMENT & TO CREATE WEALTH" -ARABINDA KUNDU  ons ated CB , <highrated ec<="" td=""><td>High  V. Very High  High  RISK CATEGORY  Very Low  Low  Low-Medium  Medium  Medium  Medium  Medium  Medium  Medium  Low  Low-Medium  Medium  Medium  Medium  Medium  Low  Low-Medium</td><td>6 Years  3 Yrs. Positional 6 Years  IDEAL TIME HORIZON  7 Days 60 Days 180 Days 2 Years 60 Days 2 Years 4 Years 5 Years 6 Years 6 Years 3 Years 90 Days</td><td>10% 10% 10% 10%  ■XIT LOAD   0% 1% 1% 5% 1% 5% 5% 5% 5% 5%</td><td>12% 20% 12% 12% 3% 4% 5% 5.5% 4% 6% 7% 7% 7%</td></highrated>	High  V. Very High  High  RISK CATEGORY  Very Low  Low  Low-Medium  Medium  Medium  Medium  Medium  Medium  Medium  Low  Low-Medium  Medium  Medium  Medium  Medium  Low  Low-Medium	6 Years  3 Yrs. Positional 6 Years  IDEAL TIME HORIZON  7 Days 60 Days 180 Days 2 Years 60 Days 2 Years 4 Years 5 Years 6 Years 6 Years 3 Years 90 Days	10% 10% 10% 10%  ■XIT LOAD   0% 1% 1% 5% 1% 5% 5% 5% 5% 5%	12% 20% 12% 12% 3% 4% 5% 5.5% 4% 6% 7% 7% 7%
Particular S 3 yrs  MAXIMUM  1 Days  91 Days  6 Months  12 Months  1 Years  3 Years  4 Years  7 Years  Across Duration  80% in high Rain Corp Bonds, Min 80% in Gs	Holding  "TIME HAS THI POWER TO REDUCE RISK IN INVESTMENT & TO CREATE WEALTH" -ARABINDA KUNDU  ons ated CB , <highrated ec<="" td=""><td>V. Very High High  RISK CATEGORY  Very Low Very Low Low-Medium Very Low Medium Medium Medium Medium Medium Medium Medium Low-Medium Medium</td><td>3 Yrs. Positional 6 Years  IDEAL TIME HORIZON  7 Days 60 Days 180 Days 2 Years 60 Days 2 Years 4 Years 5 Years 6 Years 6 Years 3 Years 90 Days</td><td>10% 10% 10%  SXIT LOAD  0% 1% 1% 5% 1% 5% 5% 5% 5% 5%</td><td>20% 12% 12%  SYPECTIFIER  3% 4% 5% 5.5% 4% 6% 7% 7% 7% 7%</td></highrated>	V. Very High High  RISK CATEGORY  Very Low Very Low Low-Medium Very Low Medium Medium Medium Medium Medium Medium Medium Low-Medium Medium	3 Yrs. Positional 6 Years  IDEAL TIME HORIZON  7 Days 60 Days 180 Days 2 Years 60 Days 2 Years 4 Years 5 Years 6 Years 6 Years 3 Years 90 Days	10% 10% 10%  SXIT LOAD  0% 1% 1% 5% 1% 5% 5% 5% 5% 5%	20% 12% 12%  SYPECTIFIER  3% 4% 5% 5.5% 4% 6% 7% 7% 7% 7%
MAXIMUM  1 Days  91 Days  6 Months  12 Months  1 Years  3 Years  4 Years  7 Years  Across Duration  80% in high Rain Corp Bonds, Min 80% in Gs	Holding  "TIME HAS THE POWER TO REDUCE RISK IN INVESTMENT & TO CREATE WEALTH" -ARABINDA KUNDU  Ons ated CB , SHighrated ec	RISK CATEGORY  Very Low Low Low-Medium Very Low Medium Medium Medium Medium Medium Low Medium Low Low-Medium	6 Years  IDEAL TIME HORIZON  7 Days 60 Days 180 Days 2 Years 60 Days 2 Years 4 Years 5 Years 6 Years 6 Years	10%  □ XIT LOAD  0%  1%  1%  5%  1%  5%  5%  5%  5%  1%	3%
MAXIMUM  1 Days  91 Days  6 Months  12 Months  1 Years  3 Years  4 Years  7 Years  Across Duration  80% in high Rain Corp Bonds,  Min 80% in Gs	POWER TO REDUCE RISK IN INVESTMENT & TO CREATE WEALTH" -ARABINDA KUNDU ONS ated CB , <highrated ec<="" td=""><td>RISK CATEGORY  Very Low  Low  Low-Medium  Very Low  Low-Medium  Medium  Medium  Medium  Medium  Medium  Low  Low-Medium</td><td>7 Days 60 Days 180 Days 2 Years 60 Days 2 Years 60 Pays 2 Years 60 Pays 2 Years 4 Years 5 Years 6 Years 3 Years</td><td>0% 1% 1% 5% 1% 5% 5% 5% 5%</td><td>  3%   4%   5%   5.5%   4%   6%   7%   7%   7%   7%  </td></highrated>	RISK CATEGORY  Very Low  Low  Low-Medium  Very Low  Low-Medium  Medium  Medium  Medium  Medium  Medium  Low  Low-Medium	7 Days 60 Days 180 Days 2 Years 60 Days 2 Years 60 Pays 2 Years 60 Pays 2 Years 4 Years 5 Years 6 Years 3 Years	0% 1% 1% 5% 1% 5% 5% 5% 5%	3%   4%   5%   5.5%   4%   6%   7%   7%   7%   7%
1 Days 91 Days 6 Months 12 Months 1 Years 3 Years 4 Years 7 Years Across Duration 80% in high Rain Corp Bonds, Min 80% in Gs	POWER TO REDUCE RISK IN INVESTMENT & TO CREATE WEALTH" -ARABINDA KUNDU Ons ated CB , SHighrated ec	Very Low Low Low-Medium Very Low Low-Medium Medium Medium Medium Medium Low Medium Low Medium	7 Days 60 Days 180 Days 2 Years 60 Days 2 Years 4 Years 5 Years 6 Years 3 Years	0% 1% 1% 5% 1% 2% 5% 5% 5%	3%   4%   5%   5.5%   4%   6%   7%   7%   7%
1 Days 91 Days 6 Months 12 Months 1 Years 3 Years 4 Years 7 Years Across Duration 80% in high Rain Corp Bonds, Min 80% in Gs	POWER TO REDUCE RISK IN INVESTMENT & TO CREATE WEALTH" -ARABINDA KUNDU Ons ated CB , SHighrated ec	Very Low Low-Medium Very Low Low-Medium Medium Medium Medium Medium Low Low-Medium	60 Days 180 Days 2 Years 60 Days 2 Years 4 Years 5 Years 6 Years 3 Years	1% 1% 5% 1% 2% 5% 5% 5% 5% 5%	4% 5% 5.5% 4% 6% 7% 7% 7%
91 Days 6 Months 12 Months 1 Years 3 Years 4 Years 7 Years Across Duration 80% in high Rain Corp Bonds, Min 80% in Gs	POWER TO REDUCE RISK IN INVESTMENT & TO CREATE WEALTH" -ARABINDA KUNDU  DOIS Ated CB , <highrated ec<="" td=""><td>Very Low Low-Medium Very Low Low-Medium Medium Medium Medium Medium Low Low-Medium</td><td>60 Days 180 Days 2 Years 60 Days 2 Years 4 Years 5 Years 6 Years 3 Years</td><td>1% 1% 5% 1% 2% 5% 5% 5% 5% 5%</td><td>4% 5% 5.5% 4% 6% 7% 7% 7%</td></highrated>	Very Low Low-Medium Very Low Low-Medium Medium Medium Medium Medium Low Low-Medium	60 Days 180 Days 2 Years 60 Days 2 Years 4 Years 5 Years 6 Years 3 Years	1% 1% 5% 1% 2% 5% 5% 5% 5% 5%	4% 5% 5.5% 4% 6% 7% 7% 7%
6 Months 12 Months 1 Years 3 Years 4 Years 7 Years Across Duration 80% in high Rain Corp Bonds, Min 80% in Gs	REDUCE RISK IN INVESTMENT & TO CREATE WEALTH" -ARABINDA KUNDU Ons ated CB , <highrated ec<="" td=""><td>Low Low-Medium Very Low Low-Medium Medium Medium Medium Medium Low Low-Medium</td><td>180 Days 2 Years 60 Days 2 Years 4 Years 5 Years 6 Years 3 Years</td><td>1% 5% 1% 2% 5% 5% 5% 5% 11%</td><td>5% 5.5% 4% 6% 7% 7% 7%</td></highrated>	Low Low-Medium Very Low Low-Medium Medium Medium Medium Medium Low Low-Medium	180 Days 2 Years 60 Days 2 Years 4 Years 5 Years 6 Years 3 Years	1% 5% 1% 2% 5% 5% 5% 5% 11%	5% 5.5% 4% 6% 7% 7% 7%
12 Months 1 Years 3 Years 4 Years 7 Years Across Duration 80% in high Rain Corp Bonds, Min 80% in Gs	RISK IN INVESTMENT & TO CREATE WEALTH" -ARABINDA KUNDU ons ated CB , <highrated ec<="" td=""><td>Low-Medium Very Low Low-Medium Medium Medium Medium Medium Low Low-Medium</td><td>2 Years 60 Days 2 Years 4 Years 5 Years 6 Years 3 Years 90 Days</td><td>5% 1% 2% 5% 5% 5% 5% 1%</td><td>5.5% 4% 6% 7% 7% 7% 7%</td></highrated>	Low-Medium Very Low Low-Medium Medium Medium Medium Medium Low Low-Medium	2 Years 60 Days 2 Years 4 Years 5 Years 6 Years 3 Years 90 Days	5% 1% 2% 5% 5% 5% 5% 1%	5.5% 4% 6% 7% 7% 7% 7%
1 Years 3 Years 4 Years 7 Years Across Duration 80% in high Rain Corp Bonds, Min 80% in Gs	INVESTMENT & TO CREATE WEALTH" -ARABINDA KUNDU  Ons ated CB , <highrated ec<="" td=""><td>Very Low Low-Medium Medium Medium Medium Medium Low Low-Medium</td><td>60 Days 2 Years 4 Years 5 Years 6 Years 3 Years 90 Days</td><td>1% 2% 5% 5% 5% 5% 1%</td><td>  4%   6%   7%   7%   7%   7%</td></highrated>	Very Low Low-Medium Medium Medium Medium Medium Low Low-Medium	60 Days 2 Years 4 Years 5 Years 6 Years 3 Years 90 Days	1% 2% 5% 5% 5% 5% 1%	4%   6%   7%   7%   7%   7%
3 Years 4 Years 7 Years Across Duration 80% in high Rain Corp Bonds, Min 80% in Gs	& TO CREATE WEALTH" -ARABINDA KUNDU ons ated CB , <highrated ec<="" td=""><td>Medium  Medium  Medium  Medium  Medium  Low  Low-Medium</td><td>2 Years 4 Years 5 Years 6 Years 3 Years 90 Days</td><td>2% 5% 5% 5% 5%</td><td>6% 7% 7% 7% 7% 7%</td></highrated>	Medium  Medium  Medium  Medium  Medium  Low  Low-Medium	2 Years 4 Years 5 Years 6 Years 3 Years 90 Days	2% 5% 5% 5% 5%	6% 7% 7% 7% 7% 7%
4 Years 7 Years Across Duration 80% in high Rain Corp Bonds, Min 80% in Gs	-ARABINDA KUNDU -ARABINDA KUNDU -ARABINDA KUNDU	Medium  Medium  Medium  Medium  Low  Low-Medium	4 Years 5 Years 6 Years 3 Years 90 Days	5% 5% 5% 5%	7% 7% 7% 7%
7 Years  Across Duration  80% in high Rain Corp Bonds,  Min 80% in Gs	-ARABINDA KUNDU -ARABINDA KUNDU -ARABINDA KUNDU	Medium  Medium  Medium  Low  Low-Medium	5 Years 6 Years 3 Years 90 Days	5% 5% 5%	7% 7% 7% 7%
Across Duratio 80% in high Ra in Corp Bonds, Min 80% in Gs	-ARABINDA KUNDU	Medium  Medium  Low  Low-Medium	6 Years 3 Years 90 Days	5% 5% 1%	7% 7% 7%
80% in high Ra in Corp Bonds, Min 80% in Gs	ons ated CB , <highrated ec<="" td=""><td>Medium Low Low-Medium</td><td>3 Years 90 Days</td><td>5%</td><td>7% 7%</td></highrated>	Medium Low Low-Medium	3 Years 90 Days	5%	7% 7%
80% in high Ra in Corp Bonds, Min 80% in Gs	ated CB , <highrated ec</highrated 	Low Low-Medium	90 Days	1%	7%
in Corp Bonds, Min 80% in Gs	, <highrated< td=""><td>Low Low-Medium</td><td></td><td></td><td>7%</td></highrated<>	Low Low-Medium			7%
in Corp Bonds, Min 80% in Gs	, <highrated< td=""><td>Low-Medium</td><td></td><td></td><td></td></highrated<>	Low-Medium			
Min 80% in Gs	ec				
0% in Coop ME	) = 10 yrs		5 Years	10%	7.5%
o /o iii usec. ML	) - IU VIS	Very High	7 Years	10%	7.5%
65% in Floting		Very Low	90 Days	0.5%	5.5%
	PSU, Public FLs	Low	180 Days	1%	6%
		RISK CATEGORY	IDEAL TIME HORIZON	EXIT LOAD	EXPECTE IRR
DEBT					
75-90%	5	Medium	3 Years	5%	9%
40-60%		Medium-High	5 Years	10%	10%
20-35%		Medium-High	5 Years	10%	11%
Balance		Low	1 Year	1%	5%
Min 10%		Medium	4 Years	5%	8%
namically Mar	agged	Modium Hal	E Voors	100/	100/
			322 (2000)1486		10%
iold /commodity /de	ebt),Min 10 % in each	Medium-High	5 Years	10%	10%
% in Securities	s of Index	High	7 Years	10%	As Index
					][
OR EA	RLIER IF				
Reti	irment	Medium-High	5y or 55 age	10%	11%
	aining Major	Medium-High	18 Yrs Child	10%	11%
	Min 10%  /namically Man  Gold /commodity /do  5% in Securities  estment - Overs  OR FA	Min 10%  //namically Managed  Gold /commodity /debt),Min 10 % in each  5% in Securities of Index estment - Overseas+Domestic  OR FARLIER IF  Retirment	Min 10%  Medium  Anamically Managed  Gold /commodity /debt),Min 10 % in each  Medium-High  Medium-High  Medium-High  Sow in Securities of Index  Estment - Overseas+Domestic  OR EARLIER IF  Retirment  Medium-High	Min 10%  Medium 4 Years  Anamically Managed  Medium-High 5 Years  Medium-High 5 Years  Medium-High 5 Years  Medium-High 7 Years  Solvent - Overseas+Domestic  OR FARLIER IF  Retirment  Medium-High 5y or 55 age	Min 10%  Medium 4 Years 5%  Medium 4 Years 5%  Medium-High 5 Years 10%  Medium-High 5 Years 10%  Medium-High 7 Years 10%  Part of the part

Wealth Signature