



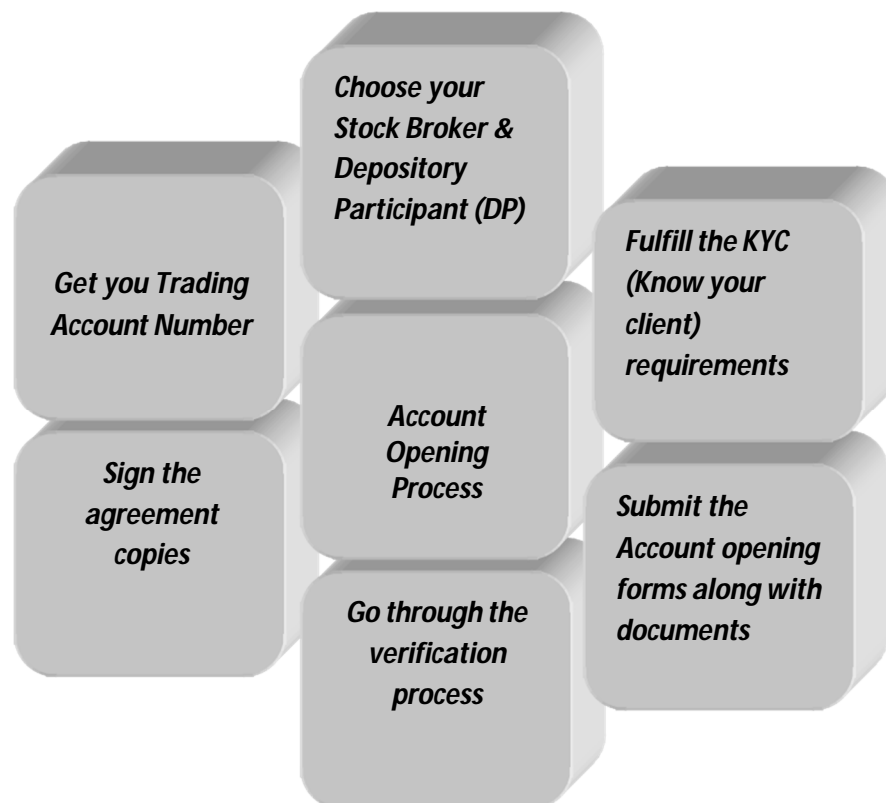
## **Account Opening process Step by Step**

- Gather Required Documents: Ensure you have the necessary documents for opening a Trading account, including proof of identity (Preferably Aadhar Card), proof of address, proof of income (if applicable), proof of bank account (Preferably Cancelled Cheque with your name printed on the Cheque Book), PAN card, and photographs.
- Make Sure That PAN CARD is linked with your AADHAR CARD.
- Select Stock Broker & Depository Participant: Select a DP and /or Stock Broker of your choice, which can be a bank or a broking firm. Research and compare the services and charges offered by different Stock Broker / DPs before making a decision.
- Account Opening Form: Obtain the account opening form from the chosen DP / Stock Broker by physically visiting the office or downloading from their website. Please Note that there will be a different forms for Opening Trading & Demat Account together or Only Trading or Only Demat Account. Take / download your form accordingly.
- Filling the Form: Carefully filling the account opening form with accurate information. Double-check all the details before submitting the form.
- If you are opening Demat and Trading account with Single identity and you want to give Power of Attorney for the Debit for Payin, you will also have to sign on POA given by the broker. Please read Carefully before signing the same.
- Attach Required Documents: Attach all the necessary documents as mentioned in the form, including proof of identity, address, income, bank account details, PAN card, Aadhar Card and photographs. Make sure to provide photocopies as per the DP's / stock Broker requirements.
- Visit the DP's / stock Broker Office: Visit the DP's / stock Broker office in person and submit the filled-out form along with the required documents. Hand over the self-attested photocopies and keep the original documents with you for verification purposes.
- Personal Verification: The DP / stock Broker will conduct a personal verification process to confirm your identity and other details.
- If you are not registered with KRA, fill up the form for registering your identity in KRA.
- Application Processing: Once the personal verification is completed, the DP / stock broker will process your application for opening a Demat / Trading account. It

generally takes 2-3 days to activate the trading account after the completion of the verification process.

- Demat Account Number / Customer ID: After the application is processed successfully, you will receive a unique Demat account number or customer ID from the DP / stock broker. This will serve as your identification for future transactions.
- You will get Two account No's. Demat Account No's will be for your Demat Holding and Debit / Credit of your shares & securities and Trading account No's for the purpose of your Trading in Stock Exchange.
- Start Trading: With your Demat/Trading account successfully opened, start trading / investing in capital market-related instruments. Don't forget to include funds in your trading account before trading/ investing.

#### Process Flow



### **DOWNLOAD FORMS FOR ACCOUNT OPENING**

You may download the Respective account opening form as per your status, from the **"Download Forms"** link given above or at the bottom of the web page and fill up the form and Call Mr. Namdev Kalap for In-person Verification Process.

Alternately please Call Mr. Balu (Rajesh) Lodha, for any Assistance in account Opening on 022-40043395 / 022-35010956.