

## **COMMON APPLICATION FORM**

For first time investors for Lumpsum Investments / SIP Investments / Zero Balance folio registration.

(PLEASE READ THE INSTRUCTIONS BEFORE FILLING UP THE FORM. ALL SECTIONS TO BE COMPLETED IN ENGLISH IN BLACK/BLUE COLOURED INK AND IN BLOCK LETTERS)

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Second	l Applicant					Indian	U.S. Others	
Third A	pplicant					Indian	U.S. Others	
ANS	If 'YES' please fill	sident (i.e., are yo for ALL countries (o a Citizen / Resider	ther than India)	in which you c	are a Resident		Yes No	
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In words

Total

In figures

5. PAY	MENT DETAILS			8=
N	on-Third Party Payment Thi	ird Party Payment (Please attach 'Third P	arty Payment Declaration Form')	
Mode	Cheque DD (Please	Bank Debit Mandate Date D	D M M Y Y Y Y Chequ	ue / DD No.
Amount (in figure	s)	(in words)		
Pay-in A/	c No.			
Account	ype Savings Curr	ent NRE NRO FCN	IR Others	Specify
IFSC code	(11 digit)	MICR Cod	le (9 digit)	
Drawn o	n bank / branch name & addre	ess		
6. DEN	NAT ACCOUNT DETAILS (OPT	IONAL)		
(Please	ensure that the sequence of name	es as mentioned in the application form mo	atches with that of the A/c held with the dep	pository participant) Refer Instruction No. 19.
	Depository Participant Name		DP I	D: I N
NSDL:	Beneficiary A/c No.			
	Depository Participant Name			
CDSL:	Beneficiary A/c No.			
Enclos	ed Client Master	Transaction / Statement Copy / DIS	Conv	
Efficios	eu Chem Musier	Transaction / Statement Copy / Dis	Сору	
7. DEC	LARATION AND SIGNATURE			
understoc source on Act, Anti A been indu "Know Yo Scheme, i the law.)" Mutual Fu policy wh my invest	od the terms, conditions, details, ly and does not involve designed Aoney Laundering Laws, Anti Coruced by any rebate or gifts, direct ur Customer" process is not compan favour of the applicant, at the afthe ARN holder has disclosed to indicate a mongst which the Scheme in the is available on the website of the ment related queries and/or reason.	rules and regulations governing the schen for the purpose of the contravention of any ruption Laws or any other applicable laws et ly or indirectly in making this investment. I, aleted by me/us to the satisfaction of the Mupplicable NAV prevailing on the date of sucme/us all the commissions (trail commissions is being recommended to me/us. I/we give he AMC / Fund. I/We give my consent to August 1964.	ne. I/We hereby declare that the amount in y Act, Rules, Regulations, Notifications or D enacted by the Government of India from tin /We confirm that the funds invested in the substance in the substance of the confirmation of the confirmation and undertake such other act on or any other mode), payable to him for the ye my / our consent to collect personal data wC and its agents to contact me over phonic ctions/ non-commercial transactions/ pro-	oply for units of the scheme. I have read and invested in the scheme is through legitimate irectives of the provisions of the Income Taxme to time. I/we have not received nor have Scheme, legally belongs to me/us. In event al Fund, to redeem the funds invested in the icon with such funds that may be required by the different competing Schemes of various or information as prescribed in the privacy e, SMS, email or any other mode to address emotions/ potential investments and other
₹50,000 that I/We	in a year (Applicable for Micro inv	restment only.) with your fund house. For NR d through approved banking channels or fr	RIs only - I / We confirm that I am/ we are No	result in aggregate investments exceeding n Residents of Indian nationality/origin and I / Non Resident Ordinary / FCNR account.
provided				ns) and hereby confirm that the information CA & CRS Terms and Conditions below and
usage (ii) I/ We her	validating/authenticating and (ii) eby provide my/our consent for s	updating my/ our Aadhaar number(s) in a haring/disclosing of the Aadhaar number(	ccordance with the Aadhaar Act, 2016 (and	le thereunder, for (i) collecting, storing and d regulations made thereunder) and PMLA. the asset management companies of SEBI ny PAN.
You	/ Sole Applicant /Guardian	Second Applicant	Third Applicant	Power of Attorney Holder

Date D D M

Μ

Place

8. QUICK CHECKLIST		
KYC acknowledgement letter (Compulsory for MICRO	) Investments)	
Self attested PAN card copy		
Plan / Option / Sub Option name mentioned in additional control of the control of	tion to scheme name	
Multiple Bank Accounts Registration form (if you wan future payments can be made from any of the accounts		
Email id and mobile number provided for online trans	saction facility	
SIP Registration Form for SIP investments		
Relationship proof between guardian and minor (if a	pplication is in the name of a minor)	
FATCA Declaration		
Additional documents attached for Third Party payme	ents. Refer instruction No. 7.	
http://online.axismf.com Invest online without any prior registration 1800 3000 3300 Additional Contact No. 8108622211	SMS HELP to 92120 10033  Transact and get folio  details on the ge	at goes beyond transactions and the app Figure or isit the web portal (/ifaconnect.axismf.com)  Managed Products
9. DEBIT MANDATE (Only for Axis Bank Account holders. Now you	don't have to issue a cheque if you hold an Axis Bank Accou	nt). To be processed in CMS software under client code "AXISMF"
We Name of th	ne account holder(s)	Application No.
authorise you to debit my/our account no.		
	rrent FCNR Others	Specify to pay for the purchase o
Axis Banking & PSU Debt Fund Axis Dynamic B		Axis Strategic Bond Fund Axis Gilt Fund
Axis Treasury Advantage Fund Axis Short Term Fu		rate Debt Fund Axis Ultra Short Term Fund
Amount (in Figures)		
Signature of First Account Holder	Signature of Second Account Holder	Signature of Third Holder
Date D D M M Y Y Y Y		1
<		

WE ACKNOWLEDGE YOUR APPLICATION Received subject to realisation, verification and conditions, an application for purchase of Units as mentioned in the application form

From

Date	Amount	Scheme	Stamp & Signature
	Date	Date Amount	Date Amount Scheme

Application No.

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Τo

Ωr

SIP Scheme 2

SIP Scheme 3



## SIP REGISTRATION FORM Application No. Distributor ARN -103058 Sub-Distributor Internal Sub-Broker Sol ID ARN EUIN -E130640 **Employee** RIA CODE^ Code Upfront commission shall be paid directly by the investor to the AMFI registered distributor based on the investor's assessment of various factors including the service rendered by the distributor. ^I/We, have invested in the scheme(s) of Axis Mutual Fund under Direct Plan. I/We hereby give my/our consent to share/provide the transactions data feed/portfolio holdings/ NAV etc. in respect of my/our investments under Direct Plan of all schemes of Axis Mutual Fund, to the above mentioned SEBI Registered Investment Adviser. "I/We hereby confirm that the EUIN box has been intentionally left blank by me/us as this transaction is executed without any interaction or advice by the employee/relationship manager/sales person of the above distributor/sub broker or notwithstanding the advice of in-appropriateness, if any, provided by the employee/relationship manager/sales person of the distributor/sub broker." You/ Sole Applicant /Guardian Second Applicant Third Applicant Power of Attorney Holder TRANSACTION CHARGES FOR APPLICATIONS THROUGH DISTRIBUTORS ONLY (Refer Instruction No. 20) I confirm that I am an existing investor across Mutual Funds. I confirm that I am a first time investor across Mutual Funds. In case the subscription amount is ₹ 10,000 or more and your Distributor has opted to receive Transaction Charges, the same are deductible as applicable from the purchase/subscription amount and payable to the Distributor. Units will be issued against the balance amount invested. **EXISTING INVESTOR'S FOLIO NUMBER** have an existing folio with KYC validated, please mention here) 1. YOUR INFORMATION (MANDATORY) Your Name (as in PAN Card / KYC records) Mr. Ms. M/s Name of the Guardian Mr. Ms. M/s Your PAN 2nd Holder PAN 3rd Holder PAN DO NOT FILL THE MANDATE BELOW, IF OTM DETAILS ARE PROVIDED IN SECTION 2 ON THE NEXT PAGE. To register Axis One Time Mandate, please fill and submit the One Time Mandate form separately. **UMRN** Date Tick (✓) Sponsor Bank Code **Utility Code** CREATE 🗸 I/We hereby authorize **Axis Mutual Fund** to debit (tick < ) SB CA CC SB-NRE SB-NRO Other MODIFY X Bank a/c number CANCEL X **IFSC** or MICR with Bank an amount of Rupees **FREQUENCY** X H-Yrly X Yrly ✓ As & when presented **DEBIT TYPE** X Fixed Amount ✓ Maximum Amount Reference 1 Phone No. Reference 2 All Schemes of Axis Mutual Fund **Email ID** I agree for the debit of mandate processing charges by the bank whom I am authorizing to debit my accounts as per latest schedule of charges of the bank **PFRIND** From Signature Primary Account holder Signature of Account holder Signature of Account holder Until Cancelled Name as in bank records Name as in bank records Name as in bank records This is to confirm that the declaration (as mentioned overleaf) has been carefully read, understood & made by me / us. I am authorizing the User Entity / Corporate to debit my account, based on the instructions as agreed and signed by me. I have understood that I am authorized 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. MANDATORY FIELDS: • Instrument Date • Account type • Bank A/c number (core banking a/c no only) • Bank name • IFSC code or MICR code (as per the cheque / pass book) • Amount (in words & in figures) • Period start date and end date or until cancelled • Account holder signature • Account holder name as per bank records. Reference 1 - PAN. ACKNOWLEDGMENT SLIP (To be filled by the investor) Investor Name SIP Scheme 1 Top-up Yes Νo

Top-up

Top-up

Yes

Yes

No

No

Stamp & Signature

2. SIP DETAILS						S	IP Regis	tration	Мо	de		A-C	MTC		K-	٠OT۸	٨		Ma	ınd	ate al	ong v	vith	SIP for
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- $\label{eq:Multiple SIP registration facility is not available for Axis Children's Gift Fund, Axis Liquid Fund, Gold ETF and during NFO.$
- Investors are required to submit Form along with a photo copy/cancelled cheque of Debit Bank Account at least 15 days before the first SIP Installment date.
- Investors shall have the option of choosing any date of the month as the SIP date except the dates 29th, 30th and 31st. If SIP date is not mentioned, default date would be considered as 7th of every month. If the SIP date falls on a non-business day or a bank holiday, the SIP debit will be processed on the following business day.
- Please refer below table for minimum amount per installments:

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Scheme	Minimum Amount (₹)	Minimum Installments
All Schemes except Axis Liquid Fund	1000	6
Axis Long Term Equity Fund*	500	6

Note: For all schemes, minimum amount is as per above table and thereafter in multiple of

For Long Term Equity Fund Minimum amount is as per above table and thereafter in multiple of  $\ref{total}$  500\*.

- If no amount is mentioned minimum scheme amount would be considered i.e. for Axis Long Term Equity Fund minimum amount would be ₹ 500/- and for other schemes minimum amount would be ₹ 1,000/-.
- For details about the Scheme and its facility please refer the SID, SAI & KIM of the respective schemes / Addendum issued from time to time carefully before investing.
- The SIP will be discontinued automatically if payment is not received for three successive 7.
- Investors can discontinue a SIP at any time by sending a written request to any Official Point of Acceptance or to the registrar Karvy. Notice of such discontinuance should be received at least 20 days prior to the due date of the next installment / debit.
- received at least 20 days prior to the due aate of the next installment / debit.

  Mandate will be processed through NACH platform offered by NPCI.

  As per SEBI circular dated August 22, 2011, Transaction Charge per subscription of ₹ 10,000/- and above shall be charged from the investors and shall be payable to the distributors/ brokers (who have not opted out of charging the transaction charge) in respect of applications routed through distributor/broker relating to Purchases / subscription / new inflows only (lumpsum and SIP), subject to the following:

  \*\*For Existing\* / New investors\* ₹100 / ₹150 as applicable por subscription of
  - For Existing / New investors: ₹100 / ₹150 as applicable per subscription of ₹10,000/–and above.
  - Transaction charge for SIP shall be applicable only if the total commitment through SIP amounts to ₹10,000/- and above. In such cases the transaction charge would be recovered in maximum 4 successful installments.
  - There shall be no transaction charge on subscription below ₹10,000/-
  - There shall be no transaction charges on direct investments.
  - There shall be no transaction charges for transaction other than purchases/subscriptions relating to new inflows such as Switches, etc.
  - Transactions carried out through the Stock Exchange platforms for mutual funds shall not be subject to transaction charges.

The requirement of minimum application amount shall not be applicable if the investment amount falls below the minimum requirement due to deduction of transaction charges from the subscription amount.

However, the option to charge "transaction charges" is at the discretion of the

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Investors may note that distributors can opt to receive transaction charges based on type of the Scheme. Accordingly, the transaction charges would be deducted from the subscription amounts, as applicable.

- subscription amounts, as applicable. Investor will not hold Axis Mutual Fund, its registrars and other service providers responsible if the transaction is delayed or not effected or the investor bank account is debited in advance or after the specific SIP date due to various clearing cycles of NACH Debit/ Local/Bank holiday. Axis Mutual Fund, its registrars and other service providers shall not be held responsible or liable for damages / compensation / loss incurred by the investor as a result of using the SIP or ECS / Auto debt facility. The investor assumes the entire risk of using this facility and takes full responsibility.
- Investor can change bank details for SIP by submitting a "CHANGE OF BANK MANDATE FOR SIP" form available on the website or at any Investor Service Centre along with cancelled cheque of the new bank with the investor's name printed on it.
- TOP-UP Facility: Under this facility the Investor can increase the SIP installment at predefined intervals by a fixed amount or any time as per the request. This facility is available for individual investors only. For availing the said facilities, investors are required to note the following:
  - Investor willing to register TOP-UP should provide the TOP-UP details along with the SIP enrolment details
  - The minimum amount for Axis TOP-UP facility is ₹ 500/- and in multiples of ₹ 1/- for all schemes; except Axis Long Term Equity Fund the minimum amount is ₹ 500 and in multiples of ₹ 500 thereafter.

    If no amount is mentioned as TOP-UP amount under frequency yearly and half-yearly, minimum TOP-UP amount would be considered, i.e., ₹ 500/- for all schemes.

  - TOP-UP frequencies available are Half-Yearly/ Yearly/ Dynamic requested intervals.
  - In case TOP-UP frequency is not indicated, it will be considered as Yearly by Default.
  - The date for Axis Mutual Fund TOP-UP Facility will correspond to the registered SIP.
  - TOP-UP will continue till the End of the SIP tenure by default.
  - In case an investor wishes to change the Top-Up amount, he/she has to provide a cancellation for the existing SIP and register fresh SIP.
  - Only TOP-UP cannot be discontinued anywhere during the SIP tenure.
  - In case of Dynamic Top up option, any changes in the amount can be made only after completion of 6 months from the date of the first installment and minimum gap between two top up requests should be 3 months and amount specified in last
  - request shall be continued till the End of the SIP tenure.
    Please see the illustration below to know how to calculate SIP Top-Up amount:
  - SIP Starts on 07/May/2016 · SIP ends on 07/12/2099 · SIP amount is ₹1000

Top-Up amount is ₹500 · Top-Up Frequency is Half-yearly

Top-Up date	SIP Amount (₹)	Top-Up Amount (₹)	New SIP Amount (₹)
7-Nov-2016	1000	500	1500
7-May-2017	1500	500	2000
7-Nov-2017	2000	500	2500
7-May-2018	2500	500	3000



## ONE TIME MANDATE (OTM) FORM

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## **INSTRUCTIONS FOR ONE TIME MANDATE**

- One Time Mandate is currently available to HUFs, Proprietor Firms and individual investors with "Single" or "Either or Survivor" the mode of holding.
- Registration of One Time Mandate will take 21 days from the date of submission of form.
- 3. Mandate will be processed through NACH platform offered by NPCI.
- 4. "National Automated Clearing House (NACH)" is Direct Electronic Debit mode implemented by National Payments Corporation of India (NPCI), list of banks is available on NPCI website www.npci.org.in. The said list is subject to modifications. The investor agrees to abide by the terms and conditions of NACH Debit/ECS of Reserve Bank of India/Banks.
- In case the Mandatory fields on the Mandate are not filled, the mandate will be rejected.
- 6. Maximum Amount: The MAXIMUM AMOUNT is the per transaction maximum limit. As investor can register for multiple SIPs with one time NACH mandate. The transaction amount should not exceed the maximum amount mentioned in the NACH mandate. It is suggested to choose a higher amount to commence additional investments in future or to absorb Top-Up increments.
- 7. Axis One Time Mandate cannot be utilized for Liquid schemes, ETF schemes, closed ended schemes, and during NFO period.
- 8. Special instructions for EasyCall / EasySMS facility:
  - Post registration, you can invest less than 2,00,000/- at a time using EasyCall & EasySMS.
  - The Distributor ARN for an EasyCall/ EasySMS transaction will be the same as registered against the folio in which the transaction is being done. In case a folio has multiple brokers registered, then the EasyCall transaction is made under the Distributor ARN of the last transaction in the folio.
  - The Investor agrees that all calls received shall be eligible for same day NAV subject to necessary formalities to be complied by the AMC in case of transaction through EasyCall & EasySMS Facility on or before the uniform cut off time.
  - SIP is not available through Easy SMS.
  - The cut off time for EasyCall transactions is 2:30pm on all business days and if the call for transaction is received after 2:30 pm it would be considered for the next day transaction.
  - The cut off time for EasySMS transactions is 3:00 pm on all business days and if the SMS for transaction is received after 3:00 pm it would be considered for the next day transaction
  - Requests like change in bank mandate, change of nomination, change in mode of holding, change of address or such other requests as the AMC may decide from time to time will not be permitted using the EasyCall & EasySMS facility.
- 9. The Investor/s shall not hold the AMC liable for the following:
  - For any transaction using the Facility carried out in good faith by the AMC on instructions of the Investor/s.
  - For unauthorized usage/ unauthorized transactions conducted by using the Facility.
  - For any loss or damage incurred or suffered by the Investor/s due to any error, defect, failure or interruption in the provision of the Facility arising from or caused by any reason whatsoever.

- For any negligence/mistake or misconduct by the Investor/s.
- For any breach or non-compliance by the Investor/s of the rules/ terms and conditions stated in the Scheme Information Document.
- For not verifying the identity of the person giving the telephone instructions in the Investor/s name.
- For not carrying out any such instructions where the AMC has reason
  to believe (which decision of the AMC the Investor/s shall not
  question or dispute) that the instructions given are not genuine or are
  otherwise improper, unclear, vague or cause for doubt.
- For carrying out a transaction after such reasonable verification as the AMC may deem fit regarding the identity of the Investor/s.
- In case of error in NAV communication.
- For accepting instructions given by any one of the Investor/s or his/her authorized person.
- 10. Axis Asset Management Company Limited (AMC) has the right to ask such information (Key Information) from the available data of the Investor/s before allowing him/ her access to avail the One Time Mandate facility (the Facility). If for any reason, the AMC is not satisfied with the replies of the Investor/s, the AMC has at its sole discretion the right of refusing access without assigning any reason/s to the Investor/s.
- 11. It is clarified that the Facility is only with a view to accommodate / facilitate the Investor/s and offered at the sole discretion of the AMC. The AMC is not bound and/or obliged in any way to give access to the Facility to Investor/s.
- 12. The Investor/s shall check his/ her account records carefully and promptly. If the Investor/s believes that there has been a mistake in any transaction using the Facility, or that an unauthorized transaction has been effected, the Investor/s shall notify the AMC immediately. If the Investor/s defaults in intimating the discrepancies in the statement within a period of fifteen days of receipt of the statements, he waives all his rights to raise the same in favor of the AMC, unless the discrepancy/ error is apparent on the face of it. By opting for the facility the Investor/s hereby irrevocably authorizes and instructs the AMC to act as his/ her agent and to do all such acts as AMC may find necessary to provide the Facility.
- 13. The Investor/s shall at all times be bound by any modifications and/ or variations made to these Terms and Conditions by the AMC at their sole discretion and without notice to them.
- 14. The Investor/s agrees and confirms that the AMC has the right to ask the Investor/s for an oral or written confirmation of any transaction request using the Facility and/ or any additional information regarding the Account of the Investor/s.
- 15. The Investor/s agrees and confirms that the AMC may at its sole discretion suspend the Facility in whole or in part at any time without prior notice.
- 16. The Investor/s shall not assign any right or interest or delegate any obligation arising herein.
- 17. The Investor/s shall take responsibility for all the transactions conducted by using the Facility and will abide by the record of transactions generated by the AMC. Further, the Investor/s confirms that such records generated by the AMC shall be conclusive proof and binding for all purposes and may be used as evidence in any proceedings and unconditionally waives all objections in this behalf.
- 18. The Investor/s agrees that use of the Facility will be deemed acceptance of the Terms and Conditions and the Investor/s will unequivocally be bound by these Terms and Conditions.