

APPLICATION NO.

COMMON APPLICATION FORM FOR FIRST TIME INVESTORS FOR LUMPSUM INVESTMENTS / SIP INVESTMENTS.

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

Distributor ARN	SUB-Distributor ARN	Internal SUB-Broker/Sol ID	EUIN	Employee Code	RIA CODE^	PMR (Portfolio Manager's Registration) Number ^^	Serial No., Date & Time Stamp		
ARN-307640			E584535						
cheme(s) of Axis Mutu Axis Mutual Fund, to the ransactions data feed	al Fund under Direct Plan. I/W le above mentioned SEBI Re portfolio holdings/ NAV etc. i firm that the EUIN box ha	/e hereby give my/our consent gistered Investment Adviser. / In respect of my/our investment s been intentionally left bla	to share/provide the transac ^I/We, have invested in th hts under Direct Plan of all so ank by me/us as this trans	tions data feed/por e scheme(s) of Axi chemes of Axis Mut action is execute	tfolio holdings/NAV etc. in re s Mutual Fund under Direct ual Fund, to the above menti d without any interaction	espect of my/our investments un Plan. I/We hereby give my/ou oned SEBI Registered Portfolio or advice by the employee,	der Direct Plan of all schemes of r consent to share/provide the Manager. relationship manager/sales		
person of the above	distributor/subbrokerorı	notwithstanding the advice	of in-appropriateness, it	fany, provided by	the employee/relationsh	ip manager/sales person of	the distributor/sub broker.		
	oplicant /Guardian		Applicant		hird Applicant	Power of A	Attorney Holder		
I confirm tha	t I am a first time invest ption amount is ₹ 10,00	ATIONS THROUGH DIS for across Mutual Funds 0 or more and your Distr nount and payable to the D	OR Confirm to libutor has opted to reco	hat I am an exis	sting investor across M Charges, the same are o	deductible as Physica	I Mode Demat Mode		
01 🧘 N	IY DETAILS (To be fi	lled in Block Letters. Please p	provide the following detai	ils in full)	(In case of investn	nent "On behalf of minor", Ple	ease refer instruction No. 11)		
Existing folio nun	nber				I/ We want to	create new Folio (Instruct	ion No. 26)		
My Name (Should	match with PAN Card)					PAN/PEKRN (1st /	Applicant) KYC		
My Guardian's Na	ame (if minor)/POA/Cont	tact Person (For Non-indiv	iduals)			PAN/PEKKN (Gua	rdian/POA) KYC		
O., bb16-414'			D (D: .! A	. , 5					
	or (*Attach Mandatory Doc		Date of Birth N	/linor's □	D M M Y Y		Birth Proof attached*		
Guardian named	s Father Mo	other Court Appo	inted		Guardian n	amed is			
02 👯 J	DINT APPLICANT	S (IF ANY) DETAIL	S			Registration) Number ^^ & Time Stamp uding the service rendered by the distributor. ^1/We, have invested in the Vetc. in respect of my/our investments under Direct Plan of all schemes of er Direct Plan 1./We hereby give my/our consent to share/provide the vive mentioned SEI Bregistered Portrollo Manager. Power of Attorney Holder Power of Attorney Holder Unit Holding Option Physical Mode Demat Mode (in case of Demat, please fill sec 7) Physical Mode Demat Mode (in case of Demat, please fill sec 7) In investment "On behalf of minor", Please refer instruction No. 11) Want to create new Folio (Instruction No. 26) PAN/PEKRN (1st Applicant) KYC PAN/PEKRN (Guardian/POA) KYC PAN/PEKRN (Guardian/POA) KYC PAN/PEKRN (Second applicant) KYC PAN/PEKRN (Third applicant) KYC PAN/PEKRN (Third applicant) KYC PAN/PEKRN (Third applicant) PMS Parents (For electronic communication, Please refer instruction No. 17) Pin Code Pin Code Pin Code Pin Code Physical Mode Demat Mode (in case of Demat, please refer instruction No. 11) Physical Mode Demat Mode (in case of Demat, please refer instruction No. 11) Want to create new Folio (Instruction No. 26) PAN/PEKRN (Guardian/POA) KYC PAN/PEKRN (Guardian/POA) KYC PAN/PEKRN (Second applicant) KYC PAN/PEKRN (Third applicant) PMS Parents (For electronic communication, Please refer instruction No. 17) Pandent Siblings Dependent Parents Guardian PMS PAN PEKRN (Fanda			
Mode of Operation	on Single Jo	oint Either or Su	rvivor(s) [Default] (Joi	nt applicant de	tails not to be filled in ca	ase of minor investments).		
2nd Applicant Na	me (Should match with PA	N Card)				PAN/PEKRN (Seco	nd applicant) KYC		
3rd Applicant Na	me (Should match with PAN	N Card)				PAN/PEKRN (Thir	d applicant) KYC		
		t related to the 1st holde in this form belongs to (tick		Children	Siblings	Parents			
03 원 N	IY CONTACT DET	AILS (As per KYC record	s. To be filled in Block Lette	ers)	(For e	electronic communication, Ple	ease refer instruction No. 17)		
Address Type (Ma	ndatory) Resident	ial & Business Re	sidential Busir	ness Re	egistered Office				
Address									
City			State			Pin Code			
,	ress (Mandatory for NRI /	FII Applicants)				6545			
, add over seds add	ress (Manades) y for the y	тт фрисанся)							
City			Country			Din Codo			
City Email ID and Mobile n	umber should pertain to First	Holder only.	Country			Pili Code			
Mobile No.	, , , , , , , , , , , , , , , , , , , ,	Tel No.		Email ID (CAPITAL					
	ail address provided in this for		Self Spouse				ts Guardian PMS		
	·		and approve for usag				ts Guardian PMS		
	bile Number provided in this fo		and approve for usag			о <u> </u>	Guardian 1115		
		then (Self) option is considered long with Annual Report & Ab		Online (Preferred	& Default) Physical Copy				
				,	(PI		-		
04 <u> </u> B	ANK ACCOUNT D	DETAILS (Avail Multiple	Bank Registration Facilit	y)		rovide their bank account de			
My Bank Name									
Bank A/C No.				A/C Type Sa	vings Current 1	NRE NRO FCNR	Others		
Branch Address									
City			State			Pin Code			
IFSC code: (11 digi	i)		MICR code (9 digit	:)		(This is a 9 digit number n	ext to your cheque number)		
LEI Code			Valid up to	D D M		Jote: LEI code mandatory to p qual to or exceeds ₹ 50 crore	provide if transaction value is limit, with LEI proof.		

05 MY II	NVESTMENT DETAILS				(For inv	estments, Please re	efer instruction No. 1 & 22)
	favour of "Scheme Name". Default pl g "Axis MF Multiple Schemes"	an/Option will be applied incase o	of no informatio	on, ambiguity or o	liscrepancy). If the investment is	s in multiple scheme	es. "The Cheque/ DD
Full Sche	eme/Plan/Option	Amount/Each SIP Amount	SIP Date	Frequency	SIP Period	(Optional) Only	-UP Facility available for Monthly SIP
LUMPSUM S	SIP	₹	D D	Daily	Start Date	Frequency	Amount ₹ in figures
Plan Regular	Direct	Less DD	(If left blank	Weekly	MMYYYY	Half Yearly	
Scheme		charges	7 th will be considered	Day	End Date	Yearly	in words
Name			as the default date) Any date	Monthly (default)	M M Y Y Y Y		
Option			between 1st to 28th	Yearly	Maximum Duration of 40 years		nomic TOD LID
					,		namic TOP-UP
	SIP	₹	D D	Daily	Start Date	Frequency Half Yearly	Amount ₹ in figures
Plan Regular	Direct	Less DD charges	(If left blank 7 th will be	Weekly	End Date	Yearly	in words
Scheme			considered as the	Day	M M Y Y Y Y		
Name			default date) Any date	Monthly (default)			
Option			between 1st to 28th	Yearly	Maximum Duration of 40 years	Dv	namic TOP-UP
	CID	a		D.il.	Start Data	Frequency	Amount
	SIP	₹	D D	Daily	Start Date	Half Yearly	₹ in figures
Plan Regular	Direct	Less DD charges	(If left blank 7 th will be	Weekly	End Date	Yearly	in words
Scheme —————Name			considered as the	Day	M M Y Y Y Y	_ ′	
TABLE			default date)	Monthly (default)			
Option			between 1st to 28th	Yearly	Maximum Duration of 40 years	Dy	namic TOP-UP
The minimum amount for	Axis TOP-UP facility is ₹ 500/- and i	in multiples of \$1/- for all coheres	event Aviel	ng Term Fault - !	Fund the minimum amount is \$ 5	500/s and in multi-li	es of ₹ 500/- thoroafter
	ough NACH (Attach NACH form)	OTM Reference N		ong termi Equity i		(if one time mandat	
	nts attached to avoid Third Par			ank Certificate			e are registered)
	TIS attached to avoid Tillia Fai	ty i ayment rejection, ii appi	icabic be	ank certificati	z, ioi bb iiiiu i ai ty i	occiai ations	
Payment Details	D D M M Y Y Y	Amount			Cho	gue No	
First Cheque Date		Y Amount	1		Che	que No.	
Bank Name			Account N	0.			
						¬	
IFSC Code			MICR Cod	e			
IFSC Code RTGS/ NEFT/ Funds Tr	ransfer		MICR Cod	e			
RTGS/ NEFT/ Funds Tr	ransfer ent bank is same as above bank	details tick here.	MICR Cod	e			
RTGS/ NEFT/ Funds Tr		details tick here.	MICR Cod	e	(Fc	or nomination, Pleas	se refer instruction No. 18)
RTGS/ NEFT/ Funds Tr	ent bank is same as above bank			e DMINEE 2	(Fo	or nomination, Pleas	
RTGS/ NEFT/ Funds Tr	ent bank is same as above bank				(FC		
RTGS/ NEFT/ Funds Tr If source of payme 06 NOM Details	ent bank is same as above bank				(Fo		
RTGS/ NEFT/ Funds Tr If source of payme 06 NOM Details Nominee Name PAN	ent bank is same as above bank				(Fc		
RTGS/ NEFT/ Funds Tr If source of payme 06 NOM Details Nominee Name PAN Allocation (%)	ent bank is same as above bank				(Fc		
RTGS/ NEFT/ Funds Tr If source of payme 06 NOM Details Nominee Name PAN Allocation (%) Relationship with Investor*	IINATION DETAILS NOMINEE 1		NG	DMINEE 2		NOMINE	EE3
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RTGS/ NEFT/ Funds Tr If source of payme 06 NOM Details Nominee Name PAN Allocation (%) Relationship with Investor* Nominee date	IINATION DETAILS NOMINEE 1		NG	DMINEE 2		NOMINE	EE3
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	W TOOK COS	IOMER (KY	C) DETAILS	if details not filled	se Tick/ Specify. The application d.)		(For k	YC details. Refer	Instruction No.
Tax Status details for		2nd Applicant			Occupation details for			3rd Applicant	Guardian
Resident Individual					Private Sector				
NRI/PIO/OCI					Public Sector				
Sole Proprietorship		-	-	-	Government Service				
Minor through Guard	lian	-	-	-	Business				
	Company	Body Co	rporate	Partnership	Professional				
Non Individual	Trust	Society	HUF	Bank	Agriculturist				
	AOP	FI FI	FII	FPI	Retired				
	In case of	Non-Profit Ent	ity (refer point	no 21)	Housewife				
Others (Please specify)				<u> </u>	Student				
We are falling under "No for religious or charitable ncome-tax Act, 1961 (43 Societies Registration Ac	of 1961), and is regis	tered as a trust or	a society under t	the	Others (Please specify)				
Company registered unde	r the section 8 of the	Companies Act, 20	013 (18 of 2013).		Politically Exposed Person	on (PEP) details	Is a PEP	Related to PEP	Not Applicat
f yes, please quote Regist	ration No. of Darpan	portal of Niti Aayo	g. (refer point no 21)	1st Applicant				
	5 (1.7)				2nd Applicant				
Gross Annual Income	Range (in ₹)	T			3rd Applicant				
Below 1 lac		1-5 lac			Guardian				
5-10 lac		10-25 lac			Authorised Signatories				
25 lac- 1 cr		1-5 cr			Promoters				
5 - 10 cr		> 10 cr			Partners				
(Mandatory for Non	as on	as on	as on	as on	Karta				
Individual) (not older than 1 year)	DDMMYY	DDMMYY	DDMMYY	DDMMYY	Whole-time Directors/T	urstee			
9 🗐 ADD	TIONAL INFO	DRMATION				(For ac	ditional informat	ion Please refer in	struction No. 8
	olicant		KINN	o. (If KYC done via	CKAC)	DOB/DO	#	Gend	der
	Applicant			O. (II KTC dolic via		р м м ү	V V V	Male	Female
	Applicant					D M M Y	V V V	Male	Female
	Applicant					D M M Y	1 1 1 V	Male	Female
	in or POA^					D M M Y	V V V	Male	Female
Date of Birth - Mandatory		ed ^G: Guardian: I	POA: Power Of A	ttorney DOB	: Date of Birth and DOI: Date of			I*idic	remaie
Details		ond Applicant		1	Third Applicant			G or POA	
2 0 0 0 1 1 1									
Mohile No									
Mobile No.									
Email Id.									
Email Id. Relationship with	ess provided in this form	m belongs to (tick an	y one):	Self Spouse and approve for usa	e	Dependent Sibling		t Parents Gua	rdian PMS
Email Id. Relationship with Investor	<u> </u>		any one)	and approve for usage	ge of these contact details for any c Dependent Children	ommunication with Dependent Sibling	Axis Mutual Fund. Dependent		
Email Id. Relationship with Investor I declare that Email addu	mber provided in this fo	orm belongs to (tick	any one)	Self Spouse and approve for usage	ge of these contact details for any c	ommunication with Dependent Sibling	Axis Mutual Fund. Dependent		
Email Id. Relationship with Investor I declare that Email addu I declare that Mobile Nu If above any option is no	mber provided in this fo	orm belongs to (tick	any one)	and approve for usage Self Spouse and approve for usage sefault.	ge of these contact details for any c Dependent Children	ommunication with Dependent Sibling ommunication with	Axis Mutual Fund. Dependent		
Email Id. Relationship with Investor I declare that Email addu I declare that Mobile Nu If above any option is no	mber provided in this for t ticked (✓) or selected	orm belongs to (tick and then (Self) option is	any one) s considered as a de	and approve for usar Self Spouse and approve for usar efault. rs: Now you don't h	ge of these contact details for any c Dependent Children Ge of these contact details for any c	ommunication with Dependent Sibling ommunication with	Axis Mutual Fund. Dependent Axis Mutual Fund.		rdian PMS
Email Id. Relationship with Investor I declare that Email addu I declare that Mobile Nu If above any option is no	mber provided in this for t ticked (<') or selected	orm belongs to (tick in then (Self) option is (Only for Axis Bar an Axis Bank Acco	any one) s considered as a do	and approve for usar Self Spouse and approve for usar efault. rs: Now you don't h	ge of these contact details for any c Dependent Children Ege of these contact details for any c ge of these contact details for any c ge of these contact details for any c ge of these contact details for any c	ommunication with Dependent Sibling ommunication with	Axis Mutual Fund. Dependent Axis Mutual Fund.	t Parents Gua	rdian PMS
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Email Id. Relationship with Investor I declare that Email addu I declare that Mobile Nu If above any option is no DEBI We authorise you to debit no	mber provided in this for t ticked (<) or selected T MANDATE my/our account no.	orm belongs to (tick then (Self) option is (Only for Axis Banan Axis Bank Acco	any one) s considered as a definite Account holde bount). To be processing of the account holde and the account holde account ho	and approve for usal Self Spouse and approve for usal efault. rs: Now you don't h essed in CMS softw account hold	pe of these contact details for any company of the company of	ommunication with Dependent Sibling ommunication with (Fo	Axis Mutual Fund. Dependent Axis Mutual Fund.	Please refer instru	rdian PMS
Email Id. Relationship with Investor I declare that Email addu I declare that Mobile Nu If above any option is no DEBI We authorise you to debit re Account type Sav	mber provided in this for t ticked (<) or selected T MANDATE my/our account no. rings NRO	orm belongs to (tick then (Self) option is (Only for Axis Ban Axis Bank Acco	any one) s considered as a do	and approve for usar Self Spouse and approve for usar efault. rs: Now you don't hessed in CMS softw	ge of these contact details for any c Dependent Children Ege of these contact details for any c ge of these contact details for any c ge of these contact details for any c ge of these contact details for any c	ommunication with Dependent Sibling ommunication with	Axis Mutual Fund. Dependent Axis Mutual Fund.	Please refer instru	rdian PMS
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11 🗐 FATCA A	AND CRS DETAILS For Individual mandatorily	als (Mandatory). Non Individual investors inc fill separate FATCA/CRS/UBO details form	cluding HUF should (Includir	ng Sole Proprietor. Refer Instruction No. 23)
Details	Sole/ 1st Applicant	2nd Applicant	3rd Applicant	Guardian/POA
Place & Country of Birth				
Nationality				
Are you a tax resident of any country other than	Yes No	Yes No	Yes No	Yes No
India?		If Yes: Mandatory to enclo	ose FATCA /CRS Annexure	
12 / DECLAR	RATION AND SIGNATURE		(For declaration	and signature, please refer point number 4)
Having read and understo understood the terms, con only and does not involve Money Laundering Laws, Aby any rebate or gifts, direct process is not completed by applicant, at the applicable disclosed to me/us all the Scheme is being recomment the AMC / Fund. I/We her through any channel of coaffiliates/group companies products and offering of of the above mentioned partiat the website of the Comp I/We confirm that I/We do ₹ 50,000 in a year (Applical I/We have remitted funds that details provided by me (ii) updating my/ our Aadh consent for sharing/disclo Registrar and Transfer Age CERTIFICATION: I / We h provided by me/us on this I accept the same. I/We have read and unde	od the content of the SID / KIM of the dilitions, details, rules and regulations designed for the purpose of the contrant Corruption Laws or any other app tity or indirectly in making this investment of the Mush Making the Side of the Side of the Side of the Mush Making the Making	ar Act, 2016 and regulations made ther lance with the Aadhaar Act, 2016 (an ing demographic information with the ne same in my/our folios with my PAN. irrements of this Form (read along wit We also confirm that I / We have read on given below/overleaf and I/We he	eclare that the amount invested in the is, Notifications or Directives of the p int of India from time to time. I/we have ted in the Scheme, legally belongs to mutual Fund, to redeem the funds in with such funds that may be required in the such funds that may be required in the privacy policy service providers to use information as prescribed in the privacy policy service providers to use information thren authorise the disclosure of the rovide information and updates to me ion collected/provided by me can be since with any law or regulation in accordith the current application will result on firm that I am/we are Non Resident on Resident External/Non Resident Or er phone, SMS, email or any other mo promotional/potential investments eunder, for (i) collecting, storing and use asset management companies of SEE h the FATCA & CRS Instructions) and and understood the FATCA & CRS Ter	escheme is through legitimate source provisions of the Income Tax Act, Anti en not received nor have been induced ne/us. In event "Know Your Customer" vested in the Scheme, in favour of the uired by the law.) The ARN holder has bus Mutual Funds amongst which the cy which is available on the website of n/data provided by me to contact me einformation contained herein to its en on various financial and investment hared/transferred and disclosed with reduce with privacy policy as available in aggregate investments exceeding to findian nationality/origin and that redinary/FCNR account. I/We confirm the to address my investment related and other communication/ material sage (ii) validating/authenticating and PMLA. I/ We hereby provide my/our BI registered mutual fund (s) and their hereby confirm that the information ms and Conditions below and hereby
You/ Sole Applicant	/Guardian Second	d Applicant	Third Applicant	Power of Attorney Holder
Date D D M M Y	Y Y Y Place			
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Bank & Branch details

AXIS ATMANIRBHAR SIP - ENROLMENT FORM

APPLICATION NO.

Stamp & Signature

FOR EXISTING / FIRST TIME INVESTORS FOR SIP INVESTMENTS

(PLEASE READ THE INSTRUCTIONS BEFORE FILLING UP THE FORM. ALL SECTIONS TO BE COMPLETED IN ENGLISH IN BLACK/BLUE COLOUF	ED INK	& IN BLOCK LETTERS
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cheme(s) of Axis Mutu of Axis Mutual Fund, to	nall be paid directly by the inve ual Fund under Direct Plan. I/V o the above mentioned SEBI R /portfolio holdings/NAV etc.	We hereby give Registered Inve	emy/our conser estment Advise	nt to share/provide the t r. ^^I/We, have investe	ransactions dat d in the scheme	a feed/portfe e(s) of Axis N	olio holdiną ⁄lutual Fun	gs/NAV e d under [tc.inresp Direct Pla	oect of my an. I/We h	our inverseby	vestmen give my/	ts under our cons	Direct sent to	Planof share/p	all sche
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Your PAN			2 nd Holde PAN	er					older AN							
2. SIP DETA	AILS			str. no. 8 SIP Reg	stration Mod	de 🔲 ,	A-OTM		к-отм] Mar	ndate al	ong wit	th SIP	form	
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TERMS & CONDITIONS FOR AXIS ATMANIRBHAR SIP

Axis Mutual Fund ("the Fund") has introduced Atmanirbhar SIP facility ("the Facility") for investments under the Growth Option of Eligible schemes of the Fund as per the following terms and conditions:

- 1. Multiple SIP registration facility is not available for Atmanirbhar SIP.
- 2. A minimum gap of 21 days and not more than 90 days needs to be maintained between date of Application & SIP start date.
- 3. Investor shall have the option of choosing any date of the month as the SIP date except the dates 29th, 30th and 31st. If SIP debit date is not mentioned default date would be considered as 7th of every month. If selected 29th, 30th or 31st, default SIP date would be considered as 28th of every month.
- 4. New folio will be created for initial Atmanirbhar SIP. For ongoing applications in Atmanirbhar SIP, existing Atmanirbhar Folio will be utilized.
- 5. Atmanirbhar SIP facility:
 - Under this facility, an investor can register for an SIP (Systematic Investment Plan) cum SWP (Systematic Withdrawal Plan) for specified duration.
 - $\bullet \qquad \mathsf{SWP} \, \mathsf{instalments} \, \mathsf{will} \, \mathsf{commence} \, \mathsf{on} \, \mathsf{completion} \, \mathsf{of} \, \mathsf{the} \, \mathsf{SIP} \, \mathsf{tenure}.$
 - Monthly SIP can be registered in the Eligible schemes for a fixed period of either 8, 10, 12, 15, 20, 25 or 30 years.
 - $\bullet \qquad \text{Existing SIP registrations cannot be converted into Atmanir bhar SIP registrations}.$
 - On completion of the SIP period, the entire accumulated clear units under Atmanirbhar SIP will be switched into a pre-defined Target scheme chosen by the investor. The switch will be on T+15 days (T being the last SIP transaction date of the Atmanirbhar SIP) [or next business day if that day is a non business day] at Applicable NAV.
 - The units under Target scheme will be allotted under the Plan chosen at time of selecting Source scheme. The switch transaction would be subject to loads and taxes, as applicable.
 - The investor has the option to register the SIP and SWP in the same scheme or different schemes. In case, source scheme name is not mentioned, the application will be rejected. If Source and Target scheme are same, the application will be processed under option A.
 - Investors will have 2 options as under:

Option A: Same scheme for SIP and SWP.

Option B: SIP and SWP will be in different schemes.

- SIP will be in Source scheme.
- > On completion of SIP Tenure, amount will be switched to Target Scheme at Applicable NAV at the end of 15 days from the date of last SIP instalment and SWP will be carried out from Target Scheme.
- If Source Scheme is mentioned and Target scheme is not mentioned, Switch & SWP will be registered in default scheme Axis Balanced Advantage Fund.
- 6. SIP Amount: In case SIP Amount is not legible/not clear, the form is liable to be rejected. In case SIP Amount is not selected/mentioned, default amount Rs. 1000 will be considered for SIP registration. Investor cannot modify the amount or tenure under Atmanirbhar Facility.
- 7. **Atmanirbhar SWP:** On switch of Atmanirbhar SIP, SWP shall be activated from Target scheme from the month following the month of completion of SIP tenure, for an amount specified in the matrix below or as may be specified by the investor.

SIPTenure	Monthly SWP Instalments
8 Years	1.0 times monthly SIP Instalments
10 Years	1.5 times monthly SIP Instalments
12 Years	2.0 times monthly SIP Instalments
15 Years	3.0 times monthly SIP Instalments
20 Years	5.0 times monthly SIP Instalments
25 Years	8.0 times monthly SIP Instalments
30 Years	12.0 times monthly SIP Instalments

- SWP date will be same as the SIP date.
- SIP Switch/Modification facility is not available under this Facility. Investor can change the target scheme during last three months of completion of SIP tenure.
- $\textbf{8.} \qquad \textbf{Eligible Schemes:} \ The \ Eligible \ Source scheme \ and \ Target \ Scheme \ under the \ Facility \ are \ as \ under:$

Source Schemes	Target Schemes
Equity oriented schemes excluding Exchange Traded Funds, Solution oriented schemes and Axis Long Term Equity Fund	
Hybrid Schemes	
Equity Index Funds	All schemes except Exchange Traded Funds, Solution oriented schemes and
Axis Equity ETF Fund of Fund	Axis Long Term Equity Fund
Axis Nasdaq 100 Fund of Fund	

- The facility is only available under Growth option. However, it is available under both Regular and Direct plans of the Eligible Source scheme and Target Scheme.
- The AMC reserves the right to modify list of eligible schemes from time to time.
- 9. Cancellation of Atmanirbhar facility: The registration under the Facility will be discontinued:
 - $\bullet \qquad \text{Investor can discontinue the facility by giving 10 calendar days written notice to any nearest OPA/ISC of Axis Mutual Fund.}$
 - On cancellation/cessation of SIP before the end of SIP tenure, the switch and SWP facility will cease.
 - $\bullet \qquad In case of redemption/switch out is processed in Source Scheme after the SIP tenure till the execution of SWP, SWP will cease.$
 - In case redemption / switch out is processed in Source Scheme during the SIP tenure, the switch transaction and SWP facility will cease, however SIP shall continue like normal SIP.
 - In case of investor demise intimation during the SIP tenure, the switch and the SWP shall cease.
 - In case of investor demise intimation post SIP tenure but upto Dec 2099 (or till units are available), the SWP shall cease.
 - The SIP will be discontinued automatically if payment is not received for three successive instalments.
- 10. Under the Atmanirbhar SIP folio, investor may undertake Additional Purchase/Switch-in/Atmanirbhar SIP/STP/registrations etc. However, only total clear units accumulated through Atmanirbhar SIP facility will be considered for switch to Target Scheme.
- 11. Purchase and Switch in is allowed under the Target Scheme. However, SWP amount under the facility would be triggered on a first in first out basis.
- $12. \quad The \ Facility is available only under non-demat mode.$
- 13. The Facility is not available to minor investors.
- $14. \quad This facility is available for individuals and non individual investors.$
- 15. All other terms and conditions applicable to Systematic Investment Plan and Systematic Withdrawal Plan (SWP) facilities for respective schemes shall apply mutatis mutandis to this Facility.

The AMC/Trustee reserves the right to change/modify the terms and conditions of the facility or with draw the facility.

 $Investors \, are requested to \, refer to \, the \, Enrolment \, Form \, available \, on \, our \, website \, viz. \, www. \, axismf. \, com \, or \, with \, ISCs, for the \, latest terms \, and \, conditions, \, before \, enrolling.$



ONE TIME MANDATE (OTM) FORM

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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.

INSTRUCTIONS FOR ONE TIME MANDATE

- 1. One Time Mandate is currently available to HUFs, Proprietor Firms, Non-individual and individual investors with "Single" or "Either or Survivor" the mode of holding. If any other record is reported, the same will be registered as NACH mandate only.
- 2. 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.
- 5. 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. 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.
- 9. 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.
- 10. 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.
- 11. 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.
- 12. 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
- 13. 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.
- $14. \ \ The Investor/s \ agrees \ and \ confirms \ that \ the \ AMC \ may \ at \ its sole \ discretion \ suspend \ the \ Facility \ in \ whole \ or \ in \ part \ at \ any \ time \ without \ prior \ notice.$
- 15. The Investor/s shall not assign any right or interest or delegate any obligation arising herein.
- 16. 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.
- 17. 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.

SIP REGISTRATION FORM

for first time investors, submit Common Application form along with this form.

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2. SIP DETAILS			SIP Registration N	Node A-OTM	K-OTM Mandate along with SIP form
OTM Reference No.					
Scheme / Plan / Option		Date/Day Enr	rollment Period	SIP Amount	TOP-UP Facility (Optional) Only available for Monthly SIP
		f Inst. no. 3)	(MMYY)	0.1.7.1.104.114	Frequency Amount
	**Daily #Weekly	From		₹ in figures	Half Yearly ₹ in figures
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SIP initial payment details (Optional)					
Drawn on bank / branch name				Amou	unt
Mode Cheque/DD Cheque	e/DD		Dat	ed D D M M Y	YYY
In case of multiple SIP, mention "Axis	MF Multiple Schem	nes" on the payme	ent instrument.		
3. Declaration and Signature (to be signed by al	ll unit holders i	f mode of holdin	g is 'joint')	
payment of SIP installments and/or an time to time. If the transaction is delaye will also inform Axis Mutual Fund abou	y lumpsum payments ed or not effected at a it any changes in my b	s through an Elect all for reasons of i bank account. I/W	tronic Debit arrang ncomplete or incor /e hereby authorize	ement/NACH (National Aut rect information, I/We woul to honour such payments a	roviders to debit my / our bank account towards tomated Clearing House) as per my request from d not hold the user institution responsible. I/We dn have signed and endorsed the Mandate Form. narges, if any, may be charged to my/our account.
You/ Sole Applicant /Guar	rdian		Second Applicant		Third Applicant
				P & TOP-UP	
Multiple SIP registration facility is not avaiduring NFO. OTMend date cannot be more than 40 years. Investors are required to submit Form alo Account at least 21 days before the first SIP Ir. Investor shall have the option of choosing; 29th, 30th and 31st. If SIP date is not mentif	ilable for Axis Children's formthe date of the manda ng with a photo copy/cand nstallment date.	Gift Fund, ETF schen ate. Icelled cheque of Deb	nes and brok thro SIP), it Bank • [ers (who have not opted out of chargush distributor/broker relating to listing to the following:	ing the transaction charge) in respect of applications routed Purchases / subscription / new inflows only (lumpsum and 1150 as applicable per subscription of ₹10,000/- and above. pplicable only if the total commitment through SIP amounts is the transaction charge would be recovered in maximum 4

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. ** Will be triggered and processed only on Business Days. # will be triggered and processed on the day opted by the investor. If the day opted falls on non-business day, it will be triggered and processed on the next business day.

Please refer below table for minimum installments:

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	**Daily/#	Weekly/	"*Monthly		*Yearly					
	Min.₹	7	Min Inst.	Min.	7	∙lin Inst.				
All schemes, except ETFs & schemes mentioned in tables below.	100		6	1200	0	3				
	**Daily/#	#Weekly	*Mo	nthly	*Ye	arly				
	Min.₹	Min Inst.	Min.₹	Min Inst.	Min.₹	Min Inst.				
Axis Overnight Fund & Axis Liquid Fund	1000	6	NA	NA	NA	NA				
Axis Long Term Equity Fund*	NA	NA	500	6	6000	3				
Axis Banking & PSU Debt Fund, Axis Childrens Gift Fund, Axis Credit Risk Fund, Axis Dynamic Bond Fund, Axis Equity ETFs Gra- Axis Floater Fund, Axis Gilt Fund, Axis Money Market Fund, Axis Retirement Savings Fund, Axis Short Term Fund, Axis Silver Fund Of Fund, Axis Treasury Advantage Fund, Axis Ultra Short Term Fund		6	1000	6	12000	3				
Axis Nifty AAA Bond Plus SDL Apr 2026 50:50 ETF FoF, Axis CRISIL IBX 50:50 Gilt Plus SDL September 2027 Index Fund, Axis CRISIL IBX 50:50 Gilt Plus SDL June 2028 Index Fund & Axis Nifty SDL September 2026 Debt Index Fund	NA	NA	1000	6	NA	NA				
Axis CRISIL IBX SDL May 2027 Index Fund, Axis CRISIL IBX 70:30 CPSE Plus SDL April 2025 Index Fund & Axis Long Duration Fund	NA	NA	1000	6	12000	3				

For Long Term Equity Fund Minimum amount is as per above table and thereafter in multiple of ₹500*.

- If no amount is mentioned minimum SIP installment amount would be considered. 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. 8

Note: For all schemes, minimum amount is as per above table and thereafter in multiple of ₹1

- The SIP will be discontinued automatically if payment is not received for three successive installments. Investors can discontinue a SIP at any time by sending a written request to any Official Point of Acceptance or to the registrar KFin Technologies Limited. Notice of such discontinuance should be received at least 10 days prior to the due date of the next installment/debit.

 Mandate will be processed through NACH platform offered by NPCI. 9.
- 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/ 11.

- 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

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

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.

 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 Axis Mutual Fund, its registrars and other service providers shall not be held responsible or liable for assimest he 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 orm available on the website or at any investor Service Centre along with cancelled cheque of the newbank with the investor's name printed on it.

 TOP-UP Facility: Under this facility the Investor can increase the SIP installment at pre-defined 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;
- - 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., $\overline{<}$ 500/- for all schemes.
 - TOP-UP frequencies available are Half-Yearly/Yearly/Dynamic requested intervals Incase 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.
 - ${\sf Only TOP-UP} \ cannot \ be \ discontinued \ anywhere \ during \ the \ SIP \ tenure.$
 - Only 10P-OP cannot be discontinued anywher eduring the 3P relative.

 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
 - Please see the illustration below to know how to calculate SIP Top-Up amount:
 - SIPStarts 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

- $One Time\ Mandate\ (OTM)\ is\ a common\ application\ form for registration\ of\ mandate\ centrally\ and\ not\ being\ folio\ specific.$
- OTM registration will be PAN Based and will be available for investment in all folios available with Axis Mutual Fund for Multiple SIPs and additional purchases.
- One Time Mandate is only available to HUFs, Proprietor Firms and individual investors with "Single" or "Either or Survivor" mode of holding.

Name of Applicant Vivi of declare that the particulars furnished here are correct. I / We authorize Axis Mutual Fund acting through its service providers to debit my / our bank account not provider to a fine the particulars furnished here are correct. I / We authorize Axis Mutual Fund acting through its service providers to debit my / our bank account providers to debit my / our bank account providers to debit my / our bank account to filt. If the transaction is delayed on not effected at all for reasons of incompletes or incorrect information. I/We would not hold the user institution responsible. If We hereby authorize to honour such payments and have signed and endorsed the Mandate verification charges, if any, may be charged to mylour account. If We hereby authorize to honour such payments and have signed and endorsed the Mandate verification charges, if any, may be charged to mylour account. If We hereby authorize to make providers for the bare or of his registed to get the bare of the register of the payment of the payme	
Bank Name Account No. J We declare that the particulars furnished here are correct. J We authorize Avis Mutual Fund acting through its service providers to debit my / our bank accoupayment of SIP installments and/ or any lumpsum payments through an Electronic Debit arrangement / NACH (National Automated Clearing House) as per my request to time. If the transaction is delayed or not effected at all for reasons of incomplete or incorrect information, J/We would not hold the user institution responsible. If We well also information Axis Mutual Fund about any changes in my bank account. If We hereby authorize to honour such payments and have signed and enforced the Mandate Form. Further, lauthorize my representative the beaver of this request) toget the above Mandate verification charges. If any, may be charged tomy/our account. If We hereby authorize to honour such payments and have signed and enforced the Mandate Form. If We request you to make provisions for me us and/ or and visor authorized by me to be able to cuitize this mandate for any transaction (not limited to SIP and/or payments) in all the folios associated with my PAN mentioned above any mode of transaction available to meritime to time from Axis Mutual Fund. If We give my construct to Axis Asset Management Company Limited and its agents to contact me over pronce, SMs. analla or any other mode to address my investmy queries and/or receive communication pertilating to transactions/ non-commercial transactions/ promotional/ potential investments and other communication irrespective of PAN Holder (as per folio record) Date	
We deduce that the particulars furnished here are correct. // We authorize Axis Mutual Fund acting through its service providers to debit my / our bank accoupament of SIP installments and/or any lumpsum payments through an Electronic Debit arrangement. / NACH (National Automated Clearing House) as per my request of SIP installments and/or any lumpsum payments through an Electronic Debit arrangement. / NACH (National Automated Clearing House) as per my request of the Common and SIP Mutual Fund acting through a per my request of the Common and SIP Mutual Fund acting through a per my request of the Common and SIP Mutual Fund acting through a per my request of the Common and SIP Mutual Fund acting through a per my request of the Common acting through a service and the respective of SIP and SIP Mutual Fund acting through a service of Axis Mutual Fund acting through a service of SIP Mutual F	
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INSTRUCTIONS FOR ONE TIME MANDATE

- 1. One Time Mandate is currently available to HUFs, Proprietor Firms and individual investors with "Single" or "Either or Survivor" the mode of holding.
- 2. OTM end date cannot be more than 40 years form the date of the mandate.
- 3. Registration of One Time Mandate will take 21 days from the date of submission of form.
- 4. Mandate will be processed through NACH platform offered by NPCI.
- 5. "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.
- 6. In case the Mandatory fields on the Mandate are not filled, the mandate will be rejected.
- 7. 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.
- 8. Axis One Time Mandate cannot be utilized for Liquid schemes, ETF schemes, closed ended schemes, and during NFO period.
- 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.



Folio No.

Amount

From Scheme

SYSTEMATIC TRANSFER PLAN (STP)

ARN	SUB-Distributor ARN	Internal SUB-Broker/Sol ID	EUIN	Employee Code	RIA CODE^		(Portfolio Manager's	Serial No., Da & Time Stam
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Investor Name

Frequency

To Scheme

Stamp & Signature

STP Enrolment Form - Instruction

- 1. The STP Enrolment Form should be completed in English and in Block Letters only. Please tick in the appropriate box, where boxes have been provided. The STP Enrolment Form complete in all respects, should be submitted at any of the Official Points of Acceptance of Axis Mutual Fund.
- 2. One STP Enrolment Form can be filled for one Scheme/Plan/Option only.
- 3. Investors are advised to read the Key Information Memorandum(s) (KIMs) and Scheme Information Document(s) (SIDs) of the Transferee Scheme(s) and Statement of Additional Information (SAI) carefully before investing. The SIDs / KIMs of the respective Scheme(s) and SAI are available with the ISCs of Axis Mutual Fund, brokers/distributors and also displayed at the Axis Mutual Fund website i.e. www.axismf.com

ARN Unit holders should note that unit holders' details and mode ofholding (single, joint, anyone or survivor) in the Transferee Scheme will be as per the existing folio number of the Transferor Scheme, Units will be allotted under the same folio number. Unit holders' names should match with the details in the existing folio number, failing which; the application is liable to be rejected.

- 5. STP offers unit holders the following two Plans:
 - 1. Systematic Transfer Plan (STP)
 - 2. Capital Appreciation Systematic Transfer Plan (CapSTP)

 $Investor's \, can \, opt \, for \, any \, of \, the \, above \, facility.$

Systematic Transfer Plan (STP) offers transfer facility at Daily, Weekly, Fortnightly, Monthly and Quarterly intervals.

 $Capital \, Appreciation \, STP \, (CapSTP) \, offers \, transfer \, facility \, at \, Weekly, \, Monthly \, and \, Quarterly \, intervals. \, If no \, frequency \, is \, chosen, \, Monthly \, frequency \, shall \, be \, treated \, as \, the \, Default \, Frequency.$

6. Under the CapSTP-Weekly Interval, unit holders will be eligible to transfer the entire capital appreciation amount (minimum ₹ 500) by way of capital appreciation from Monday to Friday.

Monthly Interval, unit holders will be eligible to transfer the entire capital appreciation amount(minimum ₹ 500) by way of capital appreciation on the 1st, 7th, 10th, 15thor 25thof each month.

Under the CapSTP-Quarterly Interval, unit holders will be eligible to transfer the entire capital appreciation amount (minimum ₹1,000) by way of capital appreciation on the 1st, 7th, 10th,15th or 25th of the first month of each quarter. The beginning of the quarter could be of any month e.g. January, March, July, September, etc. Please note that no transfers will take place if there is no minimum capital appreciation amount (except for last transfer leading to closure of account). The capital appreciation, if any, will be calculated from the enrolment date of the CapSTP under the folio, till the first transfer date. Subsequent capital appreciation, if any, will be the capital appreciation between the previous CapSTP date(where CapSTP has been processed and paid) and the next CapSTP date.

- 7. The provision of 'Minimum Redemption Amount' as specified in the Scheme Information Document(s) of the respective designated Transferor Schemes and 'Minimum Application Amount' specified in the Scheme Information Document(s) of the respective designated Transferor Schemes will not be applicable for STP.
- 8. Unit holders are required to fill in either the number of instalments or the enrolment period in the enrolment Form, failing which the Form is liable to be rejected.
- 9. In case Day of Transfer has not been indicated under STP- Weekly frequency, Wednesday shall be treated as Default day.
- 10. In case, the Enrolment Period has been filled, but the STP Date and/or Frequency (Monthly/Quarterly) has not been indicated, Monthly frequency shall be treated as Default frequency and 10th shall be treated as Default Date.
- 11. The application for STP/ Cap STP enrolment Monthly & Quarterly Interval should be submitted at least 4 working days and not more than 90 days before the desired commencement date.
- 12. Please refer below table for min. no. of installments and minimum amount per installment:

STP Frequency	Cycle Date	Minimum Amount* (in ₹)	Minimum Installment
Daily	Monday To Friday	1,000/-	6
Weekly	Monday To Friday	1,000/-	6
Fortnightly	Alternate Wednesday	1,000/-	6
Monthly	1st, 7th, 10th, 15th or 25th	1,000/-	6
Quarterly	1st, 7th, 10th, 15th or 25th	3,000/-	2

If the Transferree scheme is Axis Long Term Equity Fund, minimum STP amount is ₹500.

- 13. In respect of STP, the Load Structure prevalent at the time of enrolment shall govern the investors during the tenure of the STP.
- 14. A minimum period of 4 working days shall be required for registration under STP. Units will be allotted/redeemed at the applicable NAV of the respective dates of the Scheme on which such investments/withdrawals are sought from the Scheme.
- 15. The AMC reserves the right to introduce STPs at any other frequencies or on any other dates as the AMC may feel appropriate from time to time. In the event that such a day is a Holiday, the transfer would be affected on the next Business Day.
- 16. The requests for discontinuation of STP/CapSTP shall be subject to an advance notice of 4 working days before the next due date for STP.
- 17. STP will terminate automatically if all Units are liquidated or withdrawn from the account or upon the Funds' receipt of notification of death or incapacity of the Unit holder. Further, in case where the balance amount in a folio is less than the STP/CapSTP amount, the entire amount will be transferred to the transferee scheme.
- 18. If STP date/day is a non-Business Day, then the next Business Day shall be the STP Date / Day and the same will be considered for the purpose of determining the applicability of NAV.
- 19. The Trustee reserves the right to change/modify the terms and conditions of the STP. For the updated terms and conditions of STP, contact the nearest ISC or visit our website www.axismf.com

DECLARATION FORM FOR OPTING OUT OF NOMINATION IN FOLIO

		Date D D M M Y Y Y Y
To, Axis Asset Management Comp Axis House, First Floor, C-2, Wadia International Centre, Pandurang Budhkar Marg, Worli, Mumbai - 400 025, India		
Mutual Fund Folio Number		
Sole / First Holder Name		
Second Holder Name		
Third Holder Name		
folio and understand the issi the account holder(s), my/o	We do not wish to appoint any nominee(s) for my mut ues involved in non-appointment of nominee(s) and fur legal heirs would need to submit all the requisite con the value of assets held in the mutual fund folio. NAME AND SIGNATURE OF UNITHOLDER	rther are aware that in case of death of all documents issued by Court or other such
First Unitholder Name		
		First Unitholder Signature
Second Unitholder Name		
		Second Unitholder Signature
Third Unitholder Name		
		Third Unitholder Signature