

APPLICATION FORM FOR AXIS NIFTY 500 INDEX FUND

APPLICATION NO.

(An Open-Ended Index Fund tracking Nifty 500 TRI)

NFO OPENS: JUNE 26, 2024 AND NFO CLOSES: JULY 9, 2024

Distributor	SUB-Distributor	Internal SUB-Broker/Sol ID	EUIN	Employee	RIA CODE^	PMR (Portfolio Manager's Registration) Number ^^	Serial No., Date & Time Stamp
ARN	ARN	30D-Droker/30HD		Code	CODE	Registration) INUITIDE	& Time Stamp
		A ALL ANAEL COLUMN					
scheme(s) of Axis Mutu	al Fund under Direct Plan I/V	Ve hereby give my/our consent	to share/provide the tran	sactions data feed/north	folio holdings/NAV etc in	ne service rendered by the distrib respect of my/our investments ur oct Plan. I/We hereby give my/ou ntioned SEBI Registered Portfolio	nder Direct Plan of all schemes o
I/We hereby cor person of the above	firm that the EUIN box had distributor/sub broker or	as been intentionally left bl notwithstanding the advic	ank by me/us as this tra e of in-appropriatenes	ansaction is executed s, if any, provided by t	without any interactions he employee/relations	on or advice by the employee/ ship manager/sales person of	relationship manager/sale: the distributor/sub broker.
	pplicant /Guardian		Applicant		ird Applicant	Power of A	Attorney Holder
		CATIONS THROUGH DI tor across Mutual Fund		•	No. 20) ing investor across I	Mutual Funds. Unit Ho	olding Option
In case the subscr	iption amount is ₹ 10,00	00 or more and your Dist mount and payable to the D	ributor has opted to r	eceive Transaction (Charges, the same are	e deductible as Physica	Il Mode Demat Mode emat, please fill sec 7)
01 🧘 N	MY DETAILS (To be f	illed in Block Letters. Please	provide the following de	etails in full)	(In case of inves	stment "On behalf of minor", Ple	ease refer instruction No. 11)
Existing folio nur	nber				I/ We want t	o create new Folio (Instruct	ion No. 26)
My Name (Should	match with PAN Card)					PAN/PEKRN (1st /	Applicant) KYC
My Guardian's N	ame (if minor)/POA/Con	tact Person (For Non-indi	viduals)			PAN/PEKRN (Gua	rdian/POA) KYC
		cuments as per instructions)	Date of Birtl	h Minor's	D M M Y Y	Y Y Date of E	Birth Proof attached*
Guardian named	is	other Court Appo	pinted		Guardian	named is	
02 🔐 J	OINT APPLICAN	ΓS (IF ANY) DETAII	LS				
Mode of Operati	on Single	loint Either or Si	urvivor(s) [Default] (Joint applicant deta	ails not to be filled in	case of minor investments).
2nd Applicant Na	ame (Should match with PA	AN Card)				PAN/PEKRN (Seco	ond applicant) KYC
3rd Applicant Na	me (Should match with PA	N Card)				PAN/PEKRN (Thir	d applicant) KYC
		ot related to the 1st hold d in this form belongs to (tick		Children	Siblings	Parents	
03 원 _, N	MY CONTACT DET	TAILS (As per KYC record	ds. To be filled in Block L	etters)	(For	r electronic communication, Ple	ease refer instruction No. 17)
Address Type (Ma	ndatory) Residen	tial & Business Re	esidential Bu	ısiness Reg	gistered Office		
Address							
City			State			Pin Code	
Add overseas add	Iress (Mandatory for NRI /	'FII Applicants)					
		11					
City			Country			Pin Code	
· L	number should pertain to Firs	t Holder only.	Country			Fill Code	
Mobile No.		Tel No.		Email ID (CAPITAL			
	ail address provided in this for		Self Spo	use Dependent Cl	hildren Dependent	Siblings Dependent Parer	nts Guardian PMS
	·		and approve for u			on with Axis Mutual Fund. Siblings Dependent Parer	its Guardian PMS
	bile Number provided in this t		and approve for u			on with Axis Mutual Fund.	Guardian PMS
		d then (Self) option is considere along with Annual Report & Al		Online (Preferred &	Default) Physical Co		lp us save paper & contribute
I WISH to receive	San Sine Account Statement	and with Allindar Neport & Al	ged Julilliai y.	Simile (i referred &		towards a greener & clean	
04 <u> </u>	ANK ACCOUNT	DETAILS (Avail Multip	le Bank Registration Fac	ility)		(Please note that as per SEBI Re pprovide their bank account de	
My Bank Name							
Bank A/C No.				A/C Type Sav	ings Current	NRE NRO FCNR	Others
Branch Address							<u> </u>
City			State			Pin Code	
IFSC code: (11 digi	t)		MICR code (9 d	igit)			ext to your cheque number)
					MVVV	Note: LEI code mandatory to p	provide if transaction value is
LEI Code			Valid up	οιο D D M	$ V \mid Y \mid Y \mid Y \mid Y$	equal to or exceeds ₹ 50 crore	

05	S MY INVESTMENT DETA	AILS										
Cheque should b	/DD should be in favour of "Scheme Name". De e drawn favouring "Axis MF Multiple Schemes"	fault plan/Option will be applied incase	of no information	on, ambiguity or o	discrepancy). If the investment	t is in multiple sch	emes. "The Cheque/ DD					
	Full Scheme/Plan/Option	Amount/Each SIP Amoun	t SIP Date	Frequency	SIP Period		TOP-UP Facility (Optional) Only available for Monthly SIP					
LU	MPSUM SIP	₹	DD	Daily	Start Date	Frequency						
— Plan	Regular Direct	Less DD	(If left blank	Weekly	M M Y Y Y	Half Yea	rly ₹ in figures					
		charges	7 th will be considered	Dav	End Date	Yearly	in words					
Schem Name	e		as the default date)	Monthly	M M Y Y Y							
			Any date between 1st	(default)	Maximum Duration							
Optior			to 28 th	Yearly	of 40 years		Dynamic TOP-UP					
LU	MPSUM SIP	₹	DD	Daily	Start Date	Frequency Amount						
Plan	Regular Direct	Less DD	(If left blank	Weekly	M M Y Y Y	Half Yea	in figures					
C - l	_	charges	7 th will be considered	Day	End Date	Yearly	in words					
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			Any date between 1st	(default) Yearly	Maximum Duration							
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LU	MPSUM SIP	₹	DD	Daily	Start Date	Frequency	/ Amount					
Plan	Regular Direct	Less DD	(If left blank	Weekly	M M Y Y Y	Half Yea	in figures in figures					
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Schem Name	e		as the default date)	Monthly	M M Y Y Y							
_			Any date between 1st	(default)	Maximum Duration							
Option	1		to 28 th	Yearly	of 40 years		Dynamic TOP-UP					
he min	imum amount for Axis TOP-UP facility is ₹ 500	·		LSS Tax Saver Fu	nd the minimum amount is ₹ 5	- ·						
	Payment through NACH (Attach NACH OR Documents attached to avoid Thin			ank Certificate	o for DD Third Borts	if one time man Declarations	ndate are registered)					
Pavme	nt Details	ru Party Payment Rejection, ii app	iicabie D e	ank Certificati	e, for DD Tilliu Party	Deciarations						
•	heque Date D D M M Y	Y Y Amount			Ch	neque No.						
Bank N	lame		Account N	lo.								
FSC C	ode		☐ MICR Cod	e								
			- Iviicit cou		If source of payment har	 nk is same as ah	nove hank details tick he					
X1G3/	NEFT/ Fullus Italisiei		RTGS/ NEFT/ Funds Transfer If source of payment bank is same as above bank details tick here									
06 NOMINATION DETAILS (For nomination, Please refer instruction No. 18												
06	FOI NOMINATION DETAILS	;				For nomination, F	Please refer instruction No.					
	== NOMINATION DETAILS IEXURE - A	Format for	Providing I	Nominatio		For nomination, F	Please refer instruction No.					
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Second Applicant Third Applicant Guardian or POA* Obte of Birth - Mandatony if CNYC ID mentioned. *G. Guardian; POA: Power Of Altorney Details Second Applicant Third Applicant Third Applicant Gor POA Mobile No. Email Id. Reful journey (lecture that Mobile No. Lead of Birth - Mandatony if CNYC ID mentioned. *G. Guardian; POA: Power Of Altorney (lecture that Mobile No. Lead of Birth - Mandatony if CNYC ID mentioned. *G. Guardian; POA: Power Of Altorney (lecture that Mobile No. Lead of Birth - Mandatony if CNYC ID mentioned. *G. Guardian; POA: Power Of Altorney (lecture that Mobile No. Lead of Birth - Mandatony if CNYC ID mentioned. *G. Guardian; POA: Power Of Altorney (lecture that Mobile No. Lead of Birth - Mandatony if CNYC ID mentioned. *G. Guardian; POA: Power Of Altorney (lecture that Mobile No. Lead of Birth - Mandatony if CNYC ID mentioned. *G. Guardian; POA: Power Of Altorney (lecture that Mobile No. Lead of Birth - Mandatony in CNYC ID mentioned. *G. Guardian; POA: Power Of Altorney (lecture that Mobile No. Lead of Birth - Mandatony in CNYC ID mentioned. *G. Guardian; POA: Power Of Altorney (lecture that Mobile No. Lead of Birth - Mandatony in CNYC ID mentioned. *G. Guardian; POA: Power Of Altorney (lecture that Mobile Number provided in this form belongs to title; any one; and power of the Country of Birth Number of the Mobile Number of the Country of Birth Number of the Mobile Number of the Country of Birth Number of the Mobile Number of the Number of the Mobile Number of the Number	Appli	IONAL INFORMATION				information Please refer instructio
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Third Applicant Guardian or PDA: Date of Birth- Member yor Visit Denominatory (CNC) Den	First Ap	plicant			D D M M Y Y Y	/ Y Male Fer
Courdian or POA* Details Second Applicant Third Applicant Go r POA Mobile No. Email Id. Relationship with It leader the form thinking with the form belongs to lick any one: I leader the form thinking with the form belongs to lick any one: I leader the form thinking with the form belongs to lick any one: I leader the form thinking with the form belongs to lick any one: I leader the form thinking with the form belongs to lick any one: I leader the form thinking with the form belongs to lick any one: I leader the form thinking with the form belongs to lick any one: I leader the form thinking with the form belongs to lick any one: I leader the form thinking with the form belongs to lick any one: I leader the form thinking with the form belongs to lick any one: I leader the form thinking with the form belongs to lick any one: I leader the form thinking with the form belongs to lick any one: I leader the form thinking with the form belongs to lick any one: I leader the form thinking with the form belongs to lick any one: I leader the form thinking with the form belongs to lick any one: I leader the form thinking with the form belongs to lick any one: I leader the form thinking with the form belongs to lick any one: I leader the form thinking with the form belongs to lick any one: I leader the form thinking with the form belongs to lick any one: I leader the form thinking with the form belongs to lick any one: I leader the form thinking with the form belongs to lick any one: I leader the form thinking with the form belongs to lick any one: I leader the form thinking with the form belongs to lick any one: I leader the form thinking with the form belongs to lick any one: I leader the form thinking with the form thinking	Second A	pplicant			D D M M Y Y Y	/ Y Male Fen
Dote: Date of Birth - Mandatory if CRYC ID mentioned. *G. Guardian; POA: Power Of Attorney Details Second Applicant Third	Third Ap	plicant			D D M M Y Y Y	/ Y Male Fer
Details	Guardian	or POA^				Male Fer
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I/We have read and understood the instructions on nomination given below/overleaf and I/We hereby undertake to abide by the same. The instructions contained herein supercedes all previous nominations made by me/us in respect of the folio(s) mentioned above. Date D M M Y Y Y Place Power of Attorney Hole Attorney Hole WY C acknowledgement letter (Compulsory for MICRO Investments) Self attested PAN card copy Plan / Option / Sub Option name mentioned in adscheme name Multiple Bank Accounts Registration form (if you want to register multiple bank accounts so that future payments can be made from any of the additional mobile number provided for online transaction facility SIP Registration Form for SIP investments Relationship proof between guardian and	compliance with any law or re I/We confirm that I/We do no	gulation in accordance with privacy po t have any existing Micro SIP/Lumpsu for Micro investment only) with your	ed with the above olicy as available a um investments wh r fund house. For N	the monder parties including with the website of the Company. hich together with the current appli IRIs only -1/We confirm that lam/	cation will result in aggregate investments	exceeding Coand Applica
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APPLICATION SUPPORTED BY BLOCKED AMOUNT (ASBA) FORM

AXIS NIFTY 500 INDEX FUND

(An Open-Ended Index Fund tracking Nifty 500 TRI)

NFO OPENS: JUNE 26, 2024 AND NFO CLOSES: JULY 9, 2024

	BROKER/AGE	NT INFORMATION		FOR OFFICE USE ONLY								
Name and AMFI Regn No.	SUB-Distributor ARN	EUIN	PMR (Portfolio Manager's Registration) Number ^^	SCSB	SCSB IFSC Code	Syndicate Member Code	SI No.					
scheme(s) of Axis Mutua Axis Mutual Fund, to th	al Fund under Direct Plan. I/W le above mentioned SEBI Reg	ehereby give my/our consengistered Investment Adviser.	t to share/provide the transactio ^^I/We, have invested in the s	ns data feed/portfolio cheme(s) of Axis Mut	holdings/NAV etc. in respec ual Fund under Direct Plan	ce rendered by the distributor. ^I/We, ha t of my/our investments under Direct Pla I. I/We hereby give my/our consent to s ISEBI Registered Portfolio Manager.	n of all schemes of					
						dvice by the employee/ relationship anager/sales person of the distribut						
You/ Sole Ap	pplicant /Guardian	Second	Applicant	Third	Applicant	Power of Attorney F	Holder					
NAME OF FIR	ST APPLICANT	Name should be as avails	able in Demat Account)									
Mr. Ms. M/s.												
Folio Number			(If you have an existi	ng folio number, plea	se mention the number her	re)						
DEPOSITORY ACCOUNT DETAILS												
		ies Depository Ltd.	Central Depository S	onvices [India] Lin	pitod							
Depository Name		les Depository Ltd.	Central Depository 3	ervices [iridia] Liii	iited							
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PAN DETAILS	(Permanent Account N	Number)										
1st applicant		2nd a	pplicant		3rd applicar	nt						
INVESTMENT	T DETAILS											
		Scheme			Plan	Option Amo	ount					
				Re	gular Direct							
DETAILS OF E	BANK ACCOUNT	FOR BLOCKING (OF FUNDS									
Bank Account Nur			Bank Name	e								
Branch Name whe	re account is held											
Total Amount to be	e blocked	In figures			in words							
CONTACTO			/copposite	(PO Box address	is not sufficient. Mobi	le number and email is mandato	ry to avail					
	case of non Individual Ir		IAN/CORPORATE	online facility.)			,					
Address	case of non marvidual ii	ivestory			City	,						
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-}<												
AXIS MUTUAL F	ACKNOW	LEDGMENT S	LIP (to be filled i	in by the inv	vestor)	APPLICATION						
AXIS NIFTY 500	INDEX FUND					Date D D M M Y	YYY					
Received from Mr /	Ms / Mrs / M/s			an	application for purcha	ase of units						
AXIS NIFTY 500	INDEX FUND											
SCSB Account det	ails: Account No.											
Bank Name			Branch									
Total Amount to be	e blocked	In figures		in wor	ds							
Time of receipt						SCSB Stamp, S	ignature					

UNDERTAKING BY ASBA INVESTOR

1) I/We hereby under take that I/We am/are an ASBA Investor as per the applicable provisions of the SEBI (Issue of Capital and Disclosure Requirements.) Regulation 2009 ('SEBI Regulation') as amended from time to time. 2) In accordance with ASBA process provided in the SEBI Regulations and as disclosed in this application, I/We authorize (a) the SCSB to do all necessary acts including blocking of application money towards the Subscription of Units of the Scheme, to the extent mentioned above in the "SCSB/ASBA Account details" or unblocking of funds in the bank account maintained with the SCSB specified in this application form, transfer of funds to the Bank account of the Scheme/Axis Mutual Fund on receipt of instructions from its Registrar and Transfer Agent after the allotment of the Units entiting me/us to receive Units on such transfer of funds, etc. (b) Registrar and Transfer Agent to issue instruction to the SCSB to remove the block on the funds in the bank account specified in the application, upon allotment of Units and to transfer the requisite money to the Scheme's account / Bank account of Axis Mutual Fund. 3) In case the amount available in the bank account specified in the application money towards the Subscription of Units, the SCSB shall reject the application. 4) If the DP ID, Beneficiary Account No. or PAN furnished by me/us in the application is incorrect or incomplete or not matching with the depository records, the application shall be rejected and the Axis Mutual Fund or Axis Asset Management Company Limited or SCSBs shall not be liable for losse, if any. All future communication in connection with NFO should be addressed to the SCSB/RTA/AMC quoting the full name of the Sole/First Applicant, NFO Application Number, ASBA Application Number, Depository Account details [If it has been provided]. Amount applied for and the account number from where NFO amount was blocked.

DECLARATION AND SIGNATURES

Having read and understood the content of the SID / SAI of the scheme, I / we hereby apply for units of the scheme. I have read and understood the terms, conditions, rules and regulations governing the scheme. I / We hereby declare that the amount invested in the scheme is through legitimate source only and does not involve designed for the purpose of the contravention of any Act, Rules, Regulations, Notifications or Directives of the provisions of the Income Tax Act, Anti Money Laundering Laws, Anti Corruption Laws or any other applicable laws enacted by the Government of India from time to time. I / We have understood the details of the Scheme & I / we have not received nor have been induced by any rebate or gifts, directly or indirectly in making this investment. I / We confirm that the funds invested in the Scheme, legally belongs to me / us. In event "Know Your Customer" process is not completed by me / us to the satisfaction of the Mutual Fund, (I / we hereby authorize the Mutual Fund, to redeem the funds invested in the Scheme, in favour of the applicant, at the applicable NAV prevailing on the date of such redeemption and undertake such other action with such funds that may be required by the law.) The ARN holder has disclosed to me/us all the commissions (in the form of trail commission or any other mode), payable to him for the different competing Schemes of various Mutual Funds from amongst which the Scheme is being recommended to me / us. For NRIs only - I / We confirm that I am/ we are Non Residents of Indian nationality / origin and that I / We have remitted funds from abroad through approved banking channels or from funds in my/ our Non Resident External / Non Resident Ordinary / FCNR account. I / We confirm that details provided by me / us are true and correct.

unt Holders	Signat

INSTRUCTIONS FOR FILLING ASBA APPLICATION FORM

MEANING OF ASBA

ASBA is an application for subscribing to a New Fund Offer (NFO), containing an authorisation to block the application money in a bank account.

2. SELF CERTIFIED SYNDICATE BANK (SCSB)

SCSB is a banker to an issue registered with the SEBI which offers the facility of applying through the ASBA process. The list of SCSBs will be displayed by SEBI on its website at www.sebi.gov.in from time to time. ASBAs can be accepted only by SCSBs, whose names appear in the list of SCSBs displayed on SEBI's website. As on April 15, 2010,27 Banks have been recognised as SCSBs. Investors maintaining their accounts in of any of these Banks may approach one of the designated branches of these SCSBs for availing this facility. Further it may be noted that from time to time new banks register themselves as SCSBs who become eligible to provide these services and also the existing SCSBs designate additional branches that also provide this facility. An updated list of all the registered SCSBs, their controlling branches, contact details and details of their contact persons, a list of their designated branches which are providing such services is available on the website of SEBI at the address http://www.sebi.gov.in. Further these details are also available on the websites of the Stock Exchanges at http://www.bseindia.com and http://www.nseindia.com. Alternatively, investors may also contact the AMC, R& TA for information about the SCSBs or the ASBA process. These SCSBs are deemed to have entered into an agreement with the Issuer and shall be required to offer the ASBA facility to all its account holders for all issues to which ASBA process is applicable. A SCSB shall identify its Designated Branches (DBs) at which an ASBA bidder shall submit ASBA and shall also identify the Controlling Branch (CB), which shall act as a coordinating branch for the Registrar to the Issue, Stock Exchanges and Merchant Bankers. The SCSB, its DBs and CB shall continue to act as such, for all issues to which ASBA process is applicable. The SCSB may identify new DBs for the purpose of ASBA process and intimate details of the sarne to SEBI. after which SEBI wi II add the DB to the list of SCSBs maintained by it. The SCSB shall communicate the following details to Stock Exchanges for making it available on their respective websites. These details shall also be made available by the SCSB on its website: (i) Name and address of the SCSB (ii) Addresses of DBs and CB and other details such as telephone number, fax number and email ids. (iii) Name and contact details of a nodal officer at a senior level from the CB.

3. ELIGIBILITY OF INVESTORS

An Investor shall be eligible to apply through ASBA process, if he/she: (i) is a Resident Retail Individual Investor, Non Institutional Investor, QIBs, Eligible NRIs applying on non-repatriation basis, Eligible NRIs applying on repatriation basis i.e. any investor, (ii) is applying through blocking of funds in a bank account with the SCSB: Such investors are hereinafter referred as "ASBA Investors".

4. ASBA FACILITY IN BRIEF

Investor shall submit his Bid through an ASBA cum Application Form, either in physical or electronic mode, to the SCSB with whom the bank account of the ASBA Investor or bank account utilised by the ASBA Investor ("ASBA Account") in the SCSB shall block an amount equal to the NFO application Amount in the bank account specified in the ASBA cum Application Form, physical or electronic, on the basis of an authorisation to this effect given by the account holder at the time of submitting the Application. The Bid Amount shall remain blocked in the aforesaid ASBA Account until the Allotment in the New fund Offer and consequent transfer of the Application Amount against the allocated Units to the Issuer's account designated for this purpose, or until withdrawal/failure of the Offer or until withdrawal/rejection of the ASBA Application, as the case may be. The ASBA data shall thereafter be uploaded by the SCSB in the electronic IPO system of the Stock Exchanges. Once the Allotment is finalised, the R&TA to the NFO shall send an

appropriate request to the Controlling Branch of the SCSB for unblocking the relevant bank accounts and for transferring the amount allocable to the successful ASBA Bidders to the

AMC account designated for this purpose. In case of withdrawal/Rejection of the Offer, the R&TA to the Offer shall notify the SCSBs to unblock the blocked amount of the ASBA Bidders within one day from the day of receipt of such notification.

5. OBLIGATIONS OF THE AMC:

AMC shall ensure that adequate arrangements are made by the R&TA for the NFO to obtain information about all ASBAs and to treat these applications similar to non-ASBA applications while allotment of Units, as per the procedure specified in the Securities and Exchange Board of India (Issue of Capital and Disclosure Requirements) Regulations, 2009.

Investors are requested to check with their respective banks about the availability of the ASBA facility.

6. OTHER INFORMATION FOR ASBA INVESTORS:

- SCSB shall not accept any ASBA after the closing time of acceptance on the last day of the NFO period.
- $2. \quad SCSB \, shall \, give \, ASBA \, investors \, an \, acknowled \, gment \, for \, the \, receipt \, of \, ASBAs.$
- 3. SCSB shall not upload any ASBA in the electronic system of the Stock Exchange(s) unless (i) it has received the ASBA in a physical or electronic form; and (ii) it has blocked the application money in the bank account specified in the ASBA or has systems to ensure that Electronic ASBAs are accepted in the system only after blocking of application money in the relevant bank account opened with it.
- SCSB shall ensure that complaints of ASBA investors arising out of errors or delay in capturing of data, blocking or unblocking of bank accounts, etc. are satisfactorily redressed.
- SCSB shall be liable for all its omissions and commissions in discharging responsibilities in the ASBA process.
- R&TA to the NFO shall act as a nodal agency for redressing complaints of ASBA and non-ASBA investors, including providing guidance to ASBA investors regarding approaching the SCSB concerned.

Grounds for rejection of ASBA applications

 $ASBA\ application\ forms\ can\ be\ rejected\ by\ the\ AMC/Registrar/SCSBs, on\ the\ following\ technical\ grounds:$

- Applications by persons not competent to contract under the Indian Contract Act, 1872, including but not limited to minors, insane persons etc.
- 2. Mode of ASBA i.e. either Physical ASBA or Electronic ASBA, not selected or ticked.
- 3. ASBA Application Form without the stamp of the SCSB.
- 4. Application by any person outside India if not in compliance with applicable foreign and Indian laws.
- 5. Bank account details not given/incorrect details given.
- Duly certified Power of Attorney, if applicable, not submitted alongwith the ASBA application form.
- 7. No corresponding records available with the Depositories matching the parameters namely (a) Names of the ASBA applicants (including the order of names of joint holders) (b) DP ID (c) Beneficiary account number or any other relevant details pertaining to the Depository Account.
- 8. Insufficient funds in the investor's account.
- $9. \quad Application \, accepted \, by \, SCSB \, and \, not \, uploaded \, on/with \, the \, Exchange / \, Registrar.$

FOR NON-INDIVIDUALS - SUPPLEMENTARY KNOW YOUR CLIENT (KYC), FATCA, CRS & ULTIMATE BENEFICIAL OWNERSHIP (UBO) SELF CERTIFICATION FORM

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Nam	Name of the entity																																		
Type of address given at KRA Residential or Business					Residential Business							Registered Office																							
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	Is "Entity" a tax resident of any country other than India Yes No (If yes, please provide country/ies in which the entity is a resident for tax purposes and the associated Tax ID number below.)																																		
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In case TIN or its functional equivalent is not available, please provide Company Identification number or Global Entity Identification Number or GIIN, etc. In case the Entity's Country of Incorporation / Tax residence is U.S. but Entity is not a Specified U.S. Person, mention Entity's exemption code here																																			
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	1 Is the Entity a publicly traded company '(that is, a company whose shares are regularly traded on an established securities market)								ame of	•	•				,				,							,		,							
2 Is the Entity a related entity ² of a publicly traded company (a company whose shares are regularly traded on an							es [[(If					fy nar trade		of the	liste	d con	npan	y and	one	stoc	k exc	han	ge o	n wl	nich	the									
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UBO Declaration (Mandatory for a	ll entities except, a Publicly Traded Comp	oany or a related entity of Publicly Traded Co	ompany)						
Category (Please tick I Unlisted C	Company Partnership Firm Limit	ed Liability Partnership Company 🔲 Uninco	rporated association / body of individuals						
applicable category)		Religious Trust Others							
Please list below the details of control EACH controlling person(s). (Please at		tax residency / permanent residency / citizer	uship and ALL Tax Identification Numbers for						
Owner-documented FFI's should provi	de FFI Owner Reporting Statement and Au	litor's Letter with required details as mentioned	d in Form W8 BEN E (Refer 3(vi) of part C)						
Details	UBO1	UBO2	UBO3						
Name									
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UBO Code (Refer 3(iv) (A) of Part C)									
Country of Tax residency*									
Tax ID No. [%]									
Tax ID Type									
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Occupation Type	Service Business Others	Service Business Others	Service Business Others						
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Date of Birth	D D M M Y Y Y	D D M M Y Y Y	D D M M Y Y Y						
Percentage of Holding (%)^									
* To include US, where controlling person is %In case Tax Identification Number is not av ^Attach valid documentary proof like Share	# Additional details to be filled by controlling persons with tax residency / permanent residency / citizenship / Green Card in any country other than India: * To include US, where controlling person is a US citizen or green card holder %In case Tax Identification Number is not available, kindly provide functional equivalent ^Attach valid documentary proof like Shareholding pattern duly self attested by Authorized Signatory / Company Secretary *Refer 3(iii) of Part C "Refer 3(iv) (A) of Part C								
	FATCA - CRS	erms and Conditions							
The Central Board of Direct Taxes has notified Rules 114F to 114H, as part of the Income-tax Rules, 1962, which Rules require Indian financial institutions such as the Ban to seek additional personal, tax and beneficial owner information and certain certifications and documentation from all our account holders. In relevant cases, informatio will have to be reported to tax authorities/ appointed agencies. Towards compliance, we may also be required to provide information to any institutions such as withholdin agents for the purpose of ensuring appropriate withholding from the account or any proceeds in relation thereto. Should there be any change in any information provided by you, please ensure you advise us promptly, i.e., within 30 days. Please note that you may receive more than one request for information if you have multiple relationships with Axis Mutual Fund or its group entities. Therefore, it important that you respond to our request, even if you believe you have already supplied any previously requested information. If you have any questions about your tax residency, please contact your tax advisor. If any controlling person of the entity is a US citizen or resident or green card holde please include United States in the foreign country information field along with the US Tax Identification Number. \$It is mandatory to supply a TIN or functional equivalent if the country in which you are tax resident issues such identifiers. If no TIN is yet available or has not yet bee issued, please provide an explanation and attach this to the form.									
CERTIFICATION									
I/We have understood the information requirements of this Form (read along with the FATCA & CRS Instructions) and hereby confirm that the information provided by me/us on this Form is true, correct, and complete. I/We also confirm that I/We have read and understood the FATCA & CRS Terms and Conditions below and hereby accept the same.									
Name									
Designation									
Signatures Signatures Signatures									

PART C FATCA Instructions & Definitions

- 1 Financial Institution (FI) The term FI means any financial institution that is a Depository Institution, Custodial Institution, Investment Entity or Specified Insurance company, as defined.
 - Depository institution: is an entity that accepts deposits in the ordinary course of banking or similar business.
 - Custodial institution is an entity that holds as a substantial portion of its business, holds financial assets for the account of others and where it's income attributale to holding financial assets and related financial services equals or exceeds 20 percent of the entity's gross income during the shorter of
 - The three financial years preceding the year in which determination is made: or
 - (ii) The period during which the entity has been in existence, whichever is less.
 - Investment entity is any entity:
 - That primarily conducts a business or operates for or on behalf of a customer for any of the following activities or operations for or on behalf of a customer
 - Trading in money market instruments (cheques, bills, certificates of deposit, derivatives, etc.); foreign exchange; exchange, interest rate and index instruments; transferable securities; or commodity futures trading; or
 - (ii) Individual and collective portfolio management; or
 - $\label{thm:continuous} \mbox{(iii)} \ \ \mbox{Investing, administering or managing funds, money or Fnancial asset} \\ \mbox{or money on behalf of other persons;}$

OR

 The gross income of which is primarily attributable to investing, reinvesting, or trading in Fnancial assets, if the entity is managed by another entity that is a depository institution, a custodial institution, a speciFed insurance company, or an investment entity described above.

An entity is treated as primarily conducting as a business one or more of the 3 activities described above, or an entity's gross income is primarily attributable to investing, reinvesting, or trading in Financial assets of the entity's gross income attributable to the relevant activities equals or exceeds 50 percent of the entity's gross income during the shorter of:

 The three-year period ending on 31 March of the year preceding the year in which the determination is made;

OR

- (ii) The period during which the entity has been in existence.
 - The term "Investment Entity" does not include an entity that is an active non-financial entity as per codes 03, 04, 05 and 06 refer point 2c.)
- Specified Insurance Company: Entity that is an insurance company (or the holding company of an insurance company) that issues, or is obligated to make payments with respect to, a Cash Value Insurance Contract or an Annuity Contract.
- FI not required to apply for GIIN:

A. Reasons why FI not required to apply for GIIN:

Code	Sub-category
01	Governmental Entity, International Organization or Central Bank
02	Treaty Qualified Retirement Fund; a Broad Participation Retirement Fund; a Narrow Participation Retirement Fund; or a Pension Fund of a Governmental Entity, International Organization or Central Bank
03	Non-public fund of the armed forces, an employees' state insurance fund, a gratuity fund or a provident fund
04	Entity is an Indian FI solely because it is an investment entity
05	Qualified credit card issuer
06	Investment Advisors, Investment Managers& Executing Brokers
07	Exempt collective investment vehicle
08	Trustee of an Indian Trust
09	FI with a local client base
10	Non-registering local banks
11	FFI with only Low-Value Accounts
12	Sponsored investment entity and controlled foreign corporation
13	Sponsored, Closely Held Investment Vehicle
14	Owner Documented FFI

2. Non-financial entity (NFE) - Foreign entity that is not a financial institution

 $Types \, of \, NFEs \, that \, are \, regarded \, as \, excluded \, NFE \, are: \,$

a. Publicly traded company (listed company)

A company is publicly traded if its stock are regularly traded on one or more established securities markets

(Established securities market means an exchange that is officially recognized and supervised by a governmental authority in which the securities market is located and that has a meaningful annual value of sharestraded on the exchange)

b. Related entity of a publicly traded company

The NFE is a related entity of an entity of which is regularly traded on an established securities market;

c. Active NFE: (is any one of the following):

Code	Sub-category							
01	Less than 50 percent of the NFE's gross income for the preceding financial year is passive income and less than 50 percent of the assets held by the NFE during the preceding financial year are assets that produce or are held for the production of passive income;							
02	The NFE is a Governmental Entity, an Internationa Organization, a Central Bank, or an entity wholly owned by one or more of the foregoing;							
03	Substantially all of the activities of the NFE consist of holding (ir whole or in part) the outstanding stock of, or providing financing and services to, one or more subsidiaries that engage in trades or businesses other than the business of a Financial Institution except that an entity shall not qualify for this status if the entity functions as an investment fund, such as a private equity fund venture capital fund, leveraged buyout fund, or any investment vehicle whose purpose is to acquire or func companies and then hold interests in those companies as capital assets for investment purposes;							
04	The NFE is not yet operating a business and has no prior operating history, but is investing capital into assets with the intent to operate a business other than that of a Financia Institution, provided that the NFE shall not qualify for this exception after the date that is 24 months after the date of the initial organization of the NFE;							
05	The NFE was not a Financial Institution in the past five years and is in the process of liquidating its assets or is reorganizin with the intent to continue or recommence operations in business other than that of a Financial Institution;							
06	The NFE primarily engages in financing and hedging transactions with, or for, Related Entities that are not Financial Institutions, and does not provide financing or hedging services to any Entity that is not a Related Entity, provided that the group of any such Related Entities is primarily engaged in a business other than that of a Financial Institution;							
07	Any NFE that fulfills all of the following requirements:							
	It is established and operated in India exclusively for religious, charitable, scientific, artistic, cultural, athletic, or educational purposes; or it is established and operated ir India and it is a professional organization, business league chamber of commerce, labor organization, agricultural or horticultural organization, civic league or an organization operated exclusively for the promotion of social welfare;							
	It is exempt from income tax in India;							
	 It has no shareholders or members who have a proprietary or beneficial interest in its income or assets; 							
	The applicable laws of the NFE's country or territory of residence or the NFE's formation documents do not permit any income or assets of the NFE to be distributed to, or applied for the benefit of, a private person or non-charitable Entity other than pursuant to the conduct of the NFE's charitable activities, or as payment of reasonable compensation for services rendered, or as payment representing the fair market value of property which the NFE has purchased; and							
	The applicable laws of the NFE's country or territory or residence or the NFE's formation documents require that upon the NFE's liquidation or dissolution, all of its assets be distributed to a governmental entity or other non-profit organization, or escheat to the government of the NFE's country or territory of residence or any political subdivision thereof.							
	Explanation For the purpose of this sub-clause, the following shall be treated as fulfilling the criteria provided in the said sub-clause, namely:-							
	(I) an Investor Protection Fund referred to in clause (23EA);							
	(II) a Credit Guarantee Fund Trust for Small Industries referred to inclause 23EB; and							
	(III) an Investor Protection Fund referred to in clause (23EC), o							

Other definitions

(i) Related entity

An entity is a 'related entity' of another entity if either entity controls the other entity, or the two entities are under common control For this purpose, control includes direct or indirect ownership of more than 50% of the votes and value in an entity.

(ii) Passive NFE

The term passive NFE means

- any non-financial entity which is not an active non-financial entity including a publicly traded corporation or related entity of a publicly traded company; or
- (ii) an investment entity defined in clause (b) of these instructions

PART C FATCA Instructions & Definitions

(iii) a withholding foreign partnership or withholding foreign trust;

(Note: Foreign persons having controlling interest in a passive NFE are liable to be reported for tax information compliance purposes)

(iii) Passive income

The term passive income includes income by way of:

- (1) Dividends,
- (2) Interest
- (3) Income equivalent to interest,
- (4) Rents and royalties, other than rents and royalties derived in the active conduct of a business conducted, at least in part, by employees of the NFE
- (5) Annuities
- (6) The excess of gains over losses from the sale or exchange of financial assets that gives rise to passive income
- (7) The excess of gains over losses from transactions (including futures, forwards, options and similar transactions) in any financial assets,
- (8) The excess of foreign currency gains over foreign currency losses
- (9) Net income from swaps
- (10) Amounts received under cash value insurance contracts

But passive income will not include,in case of a non-financial entitythat regularly acts as a dealer in financial assets, any income from any transaction entered into in the ordinary course of such dealer's business as such a dealer.

(iv) Controlling persons

Controlling persons are natural persons who exercise control over an entity and includes a beneficial owner under sub-rule (3) of rule 9 of the Prevention of Money-Laundering (Maintenance of Records) Rules, 2005. In the case of a trust, the controlling person means the settl or, the trustees, the protector (if any), the beneficiaries or class of beneficiaries, and any other natural person exercising ultimate effective control over the trust. In the case of alegalar rangement other than a trust, controlling person means persons in equivalent or similar positions.

Pursuant to guidelines on identification of Beneficial Ownership issued vide SEBI circular no. CIR/MIRSD/2/2013 dated January 24, 2013, persons (other than Individuals) are required to provide details of Beneficial Owner(s) ('BO'). Accordingly, the Beneficial Owner means 'Natural Person', who, whether acting alone or together, or through one or more juridical person, exercises control through ownership or who ultimately has a controlling ownership interest of/entitlements to:

- More than 25% of shares or capital or profits of the juridical person, where the juridical person is a company;
- More than 15% of the capital or profits of the juridical person, where the juridical person is a partnership; or
- More than 15% of the property or capital or profits of the juridical person, where the juridical person is an unincorporated association or body of individuals.

Where the client is a trust, the financial institution shall identify the beneficial owners of the client and take reasonable measures to verify the identity of such persons, through the identity of the settler of the trust, the trustee, the protector, the beneficiaries with 15% or more interest in the trust and any other natural person exercising ultimate effective control over the trust through a chain of control or ownership.

Where no natural person is identified the identity of the relevant natural person who holds the position of senior managing official.

(A) Controlling Person Type:

Code	Sub-category
01	CP of legal person-ownership
02	CP of legal person-other means
03	CP of legal person-senior managing official
04	CP of legal arrangement-trust-settlor
05	CP of legal arrangementtrust-trustee
06	CP of legal arrangementtrust-protector
07	CP of legal arrangementtrust-beneficiary
08	CP of legal arrangementtrust-other
09	CP of legal arrangement—Other-settlor equivalent
10	CP of legal arrangement—Other-trustee equivalent
11	CP of legal arrangement—Other-protector equivalent
12	CP of legal arrangement—Other-beneficiary equivalent
13	CP of legal arrangement—Other-other equivalent
14	Unknown

- v) Specified U.S. person A U.S person other than the following:
 - a corporation the stock of which is regularly traded on one or more established securities markets;
 - (ii) any corporation that is a member of the same expanded affiliated group, as defined in section 1471(e)(2) of the U.S. Internal Revenue Code, as a corporation described in clause (i);
 - (iii) the United States or any wholly owned agency or instrumentality thereof;

- (iv) any State of the United States, any U.S. Territory, any political subdivision of any of the foregoing, or any wholly owned agency or instrumentality of any one or more of the foregoing;
- (v) any organization exempt from taxation under section 501(a) of the U.S. Internal Revenue Code or an individual retirement plan as defined in section 7701(a)(37) of the U.S. Internal Revenue Code;
- (vi) any bank as defined in section 581 of the U.S. Internal Revenue Code;
- (vii) any real estate investment trust as defined in section 856 of the U.S. Internal Revenue Code;
- (viii) any regulated investment company as defined in section 851 of the U.S. Internal Revenue Code or any entity registered with the U.S. Securities and Exchange Commission under the Investment Company Act of 1940 (15 U.S.C. 80a-64);
- (ix) any common trust fund as defined in section 584(a) of the U.S. Internal Revenue Code;
- (x) any trust that is exempt from tax under section 664(c) of the U.S. Internal Revenue Code or that is described in section 4947(a)(1) of the U.S. Internal Revenue Code;
- (xi) a dealer in securities, commodities, or derivative financial instruments (including notional principal contracts, futures, forwards, and options) that is registered as such under the laws of the United States or any State;
- (xii) a broker as defined in section 6045(c) of the U.S. Internal Revenue Code; or
- (xiii) any tax-exempt trust under a plan that is described in section 403(b) or section 457(g) of the U.S. Internal Revenue Code.

(vi) Owner documented FFI

An FFI meets the following requirements:

- (a) The FFI is an FFI solely because it is an investment entity;
- (b) The FFI is not owned by or related to any FFI that is a depository institution, custodial institution, or specified insurance company;
- (c) The FFI does not maintain a financial account for any non participating $\mbox{\rm FFI};$
- (d) The FFI provides the designated withholding agent with all of the documentation and agrees to notify the withholding agent if there is a change in circumstances; and
- (e) The designated withholding agent agrees to report to the IRS (or, in the case of a reporting Model 1 IGA, to the relevant foreign government or agency thereof) all of the information described in or (as appropriate) with respect to any specified U.S. persons and (2). Notwithstanding the previous sentence, the designated withholding agent is not required to report information with respect to an indirect owner of the FFI that holds its interest through a participating FFI, a deemed-compliant FFI (other than an owner-documented FFI), an entity that is a U.S. person, an exempt beneficial owner, or an excepted NFE.

(vii) Direct reporting NFE

A direct reporting NFFE means a NFFE that elects to report information about its direct or indirect substantial U.S. owners to the IRS.

(viii) Exemption code for U.S. persons

Code	Sub-category
Α	An organization exempt from tax under section 501(a) or any individual retirement plan as defined in section 7701(a)(37)
В	The United States or any of its agencies or instrumentalities
С	A state, the District of Columbia, a possession of the United States, or any of their political subdivisions or instrumentalities
D	A corporation the stock of which is regularly traded on one or more established securities markets, as described in Reg. section $1.1472-1(c)(1)(I)$
E	A corporation that is a member of the same expanded affiliated group as a corporation described in Reg. section 1.1472- $1(c)(1)(l)$
F	A dealer in securities, commodities, or derivative financial instruments (including notional principal contracts, futures, forwards, and options) that is registered as such under the laws of the United States or any state
G	A real estate investment trust
Н	A regulated investment company as defined in section 851 or an entity registered at all times during the tax year under the Investment Company Act of 1940
I	A common trust fund as defined in section 584(a)
J	A bank as defined in section 581
К	Abroker
L	A trust exempt from tax under section 664 or described in $section 4947(a)(1)$
М	A tax exempt trust under a section 403(b) plan or section 457(g) plan



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 COLOURED INK & IN BLOCK LETTERS
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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.
 - SWP instalments will commence on completion of the SIP 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.
 - Existing SIP registrations cannot be converted into Atmanirbhar 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.
- $\textbf{8.} \qquad \textbf{Eligible Schemes:} \ \mathsf{The Eligible Source scheme} \ \mathsf{and Target Scheme} \ \mathsf{under the Facility} \ \mathsf{are} \ \mathsf{as} \ \mathsf{under:}$

Source Schemes	Target Schemes
Equity oriented schemes excluding Exchange Traded Funds, Solution oriented schemes and Axis ELSS Tax Saver Fund	
Hybrid Schemes	
Equity Index Funds	All schemes except Exchange Traded Funds, Solution oriented schemes and
Axis Equity ETF Fund of Fund	Axis ELSS Tax Saver 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.
 - $\bullet \qquad \text{In case of investor demise intimation during the SIP tenure, the switch and the SWP shall cease.} \\$
 - 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

- $\bullet \quad \text{One Time Mandate (OTM)} is a common application form for registration of mandate centrally and not being foliospecific.$
- 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.

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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. The end date mentioned on SIP application should be equal to or, less than the end date mentioned on SIP NACH/OTM. If SIP end date exceeds from the date mentioned on the NACH/OTM then, SIP will be registered as per NACH/OTM end date.
- 4. Registration of One Time Mandate will take 21 days from the date of submission of form.
- 5. Mandate will be processed through NACH platform offered by NPCI.
- 6. "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.
- 7. In case the Mandatory fields on the Mandate are not filled, the mandate will be rejected.
- 8. 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.
- 9. Axis One Time Mandate cannot be utilized for Liquid schemes, ETF schemes, closed ended schemes, and during NFO period.
- 10. 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.
- 11. 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.
- 12. 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.
- 13. 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.
- 14. 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.
- 15. 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.
- 16. 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.
- 17. The Investor/s shall not assign any right or interest or delegate any obligation arising herein.
- 18. 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.
- 19. 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.

Distribu ARN		SUB-Distributo ARN		Internal 3-Broker/Sol II)	EUIN		Employe Code	е		RIA DDE	\	P Reg	MR gistra	(Port	^{folio Ma} lumb	nage Oer	er's				o., Da Stam	
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Scheme / Plan / Option Frequency (Ref Inst. no. 5) (Ref Ins	OTM Reference No.]	
Ref inst. in. 5 Ref inst. in. 6 Ref inst.					SIP Amount		
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	You/ Sole Applicant /0	Guardian		Second Applicant		Third Applic	cant
INSTRUCTIONS FOR SIP & TOP-UP							

- SIP NACH/OTM. If SIP end date exceeds from the date mentioned on the NACH/OTM then, SIP will be registered as per NACH/OTM enddate.

 Investors are required to submit Form along with a photo copy/cancelled cheque of Debit Bank Account at least 21 days before the first SIP Installment date.
- **Trivestor 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 fils 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/#	Weekl	y/*M	lonthly		*Yea	irly	
	Min.₹		М	in Inst.	Min.	₹	М	in Inst.
All schemes, except ETFs & schemes mentioned in tables below.	100			6	1200	0		3
	**Daily/#	Week	y	*Moi	nthly		*Yea	arly
	Min.₹	Min Inst		Min.₹	Min Inst.	Min	.₹	Min Inst.
Axis Overnight Fund & Axis Liquid Fund	1000	6		NA	NA	N/	4	NA
Axis ELSS Tax Saver Fund*	NA	NA		500	6	600	00	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	100	6		1000	6	120		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	N.A		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 Jute: For all schemes minimum appr	NA	NA		1000	6	120		3

- If no amount is mentioned minimum SIP in stallment amount would be considered.8.
- For details about the Scheme and its facility please refer the SID, SAI & KIM of the respective schemes/Addendumissued from time to time carefully before investing.
- For daily, weekly and monthly frequency the SIP will be discontinued automatically if payment is not received for three successive installments. In case of Yearly frequency, the SIP registration will stand automatically cancelled, in case of 2 consecutive failed debits.
- 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.

- SIP), subject to the following:
 - For Éxisting/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.

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- 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

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 damages/compensation / loss incurred by the investor as a result of using the SIP or ECS/ Auto debt facility. He 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 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.
- - 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 ELSS Tax Saver 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 to pure of the 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



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 on) Number ^/	Serial No & Time
cheme(s) of Axis Mutu Axis Mutual Fund, to t	ual Fund under Direct Plan. I/N the above mentioned SEBI Re	restor to the AMFI registered dis We hereby give my/our consent t egistered Investment Adviser. ^	to share/provide the tra ^I/We, have invested	ansactions data feed/p in the scheme(s) of A	ortfolio holdings/NAV e xis Mutual Fund under	tc.in respect of m Direct Plan. I/W	ny/our investments of e hereby give my/o	under Direct Plan o our consent to sha
I/We hereby cor	nfirm that the EUIN box ha	inrespect of my/our investmen as been intentionally left bla r notwithstanding the advice	nk by me/us as this t	ransaction is execu	ted without any intera	action or advic	e by the employe	e/ relationship m
You/ Sole A	Applicant /Guardian	Second A	Applicant		Third Applicant		Power of	Attorney Ho
I confirm that	at I am a first time inves ption amount is ₹10,000 c	CATIONS THROUGH DIS stor across Mutual Funds. or more and your Distributor issued against the balance an	OR I confi	rm that I am an ex	disting investor acro			rchase/subscript
1 Applic	ant Details				Folio No.			
Sole / 1st U (as in PAN Card	d / KYC records)							
(as case of mind 1st Holder	or)		2nd Holder PAN	2	Middle Name nd Applicant			Last Nam
PAN 3rd Holder PAN	3rd	Applicant	PAN					
2 SYSTI	EMATIC TRANSF	ER PLAN (STP) (To b	oe submitted at	least 4 working	g days before the	1st due dat	e for transfer	·).
From Schem	ne#					Plan	☐ Direct	Regular
Option (tick	✓) ✓ Growth							
To Scheme						Plan	☐ Direct	Regular
Option (tick	(✓) ☐ Growth ☐	IDCW Reinvestment	☐ IDCW P	ayout	IDCV	V Frequency		
☐ Daily☐ Weekly*	equency (Please tick (🗸) (Monday To Friday) D tly (Every Alternate We	·	uencies)	Weekly (Mond	cy (Please tick (🗸) an ay To Friday) * Day c ease tick (🗸) any one)] 1st 🔲 7th		elow frequenci	es)
☐ Monthly:	1st /th	☐ 10th ☐ 15th	□ 25th	Please ref instructi	on no. 12.			
Transfer Ins	talment₹	No. of In	stalments	OR Trans	fer Period From	D D M I	M Y Y D	D M M (Last Instalment)
terms, conditi not involve ar	ions, rules and regulation nd is not designed for the dering Laws, Anti Corrup / we have not received n	tents of the Scheme Inforns governing the Scheme(se purpose of the contraverotion Laws or any other abor have been induced by an the event "Know Your Cu	s). I/We hereby de ntion of any Act, R plicable laws enact iny rebate or gifts, o stomer" process is	clare that the amo cules, Regulations, ted by the Govern directly or indirect a not completed by	unt invested in the S Notifications or Dir ment of India from ti tly in making this inv me/us to the satisfa	cheme(s) is the rections of the ime to time. I / estment. I / W action of the N	rough legitimate provisions of the We have under e confirm that the Nutual Fund, I/w	e sources only a ne Income Tax A stood the detai ne funds investe ve hereby autho
Scheme(s) & I Scheme(s), let Mutual Fund, other action w The ARN holo Mutual Funds For NRIs only channels or fr	to redeem the funds inv with such funds that may ber has disclosed to me/u s from amongst which the y: I / We confirm that I a comfunds in my/our Nor		he form of trail com nended to me/us. is of Indian nation -Resident Ordinar	nmission or any oth	ner mode), payable to		•	ing Schemes of
Scheme(s) & I Scheme(s), let Mutual Fund, other action w The ARN holo Mutual Funds For NRIs only channels or fr	to redeem the funds inv with such funds that may ber has disclosed to me/u s from amongst which the y: I / We confirm that I a comfunds in my/our Nor	be required by the Law. Is all the commissions (in the Scheme is being recomm It we are Non Resident It resident External / Non-	he form of trail com nended to me/us. is of Indian nation -Resident Ordinar	nmission or any oth	ner mode), payable to		•	ing Schemes of

Investor Name

Frequency

To Scheme

Stamp & Signature

STP Enrolment Form - Instruction

- 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
- 4. 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.

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

 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 ELSS Tax Saver 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 of Non-Profit Organization (NPO) (Mandatory for Trusts/Society)

Investor Name																									
PAN																									
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SMART SWITCH FACILITY

ENROLMENT FORM

Distributor ARN	Sub-Distributor ARN	Internal Sub-Broker/Sol ID	EUIN	Employee Code	RIA CODE^	PMR	(Portfolio Manager's ion) Number ^^	Serial No., Date & Time Stamp
AINIY	AINI	Jub-Droker/3011D		Code	CODL	Registrati	ion, ramber	a rime stamp
Upfront commission sha scheme(s) of Axis Mutua Axis Mutual Fund, to th	all be paid directly by the inve al Fund under Direct Plan. I/V e above mentioned SEBI Re	estor to the AMFI registered dis Ve hereby give my/our consent t gistered Investment Adviser. ^ in respect of my/our investmen	tributor based on the investo share/provide the transa ^I/We, have invested in t	stor's assessment of va ctions data feed/portf he scheme(s) of Axis	arious factors including th folio holdings/NAV etc. in Mutual Fund under Dire	ne service re respect of m ct Plan. I/W	endered by the distribut ny/our investments und /e hereby give my/our	or. ^I/We, have invested in the er Direct Plan of all schemes o consent to share/provide the
I/We hereby cont	irm that the EUIN box ha	inrespect of my/our investmen as been intentionally left bla notwithstanding the advice	nk by me/us as this tran	saction is executed	without any interaction	on or advic	e by the employee/ r	elationship manager/sales
	pplicant /Guardian	Second A		1	ird Applicant	Simp manag		ttorney Holder
01 INVESTOR	R DETAILS							
Existing folio nu				PAN/PEKRN	(1st Applicant)			
My Name								
02 SCHEME	DETAILS (for Lumpsum	investment / Switch Out Sch	neme) (Purchase applicat	ions would be accept	ted only upto applicable	cut -off tin	nings on July 08, 2024	ł.)
Scheme name (Please ✓ choice of	of Scheme) Axis	s Money Market Fund						
Plan (Please ✓ choice o	of Scheme) Reg	ular Plan 🔲 Dir	ect Plan		Option	\checkmark	Growth Option	
03 INVESTMI	ENT DETAILS							
DD/Cheque No	o	NEFT/ RTGS/ I	Fund Transfer		One Time	Manda	te (OTM)	
Amount ₹ (in fig	gures)		₹ (in words)					
Dated	D D M	M Y Y Y Y	Bank & Branch					
04 SWITCH-	IN SCHEME DETAI	LS				_		
Scheme name	AXIS NIFTY 500	INDEX FUND				Plan	Regular Plar	Direct Plan
Option	Growth Opti							
	d understood the te TION AND SIGNAT	rms & conditions of SI	MART SWITCH Fa	cility.				
terms, conditions, designed for the pt Laws or any other a investment. I/We c Fund, (I/we hereby undertake such oth the different comp prescribed in the prinformation contain financial and invest disclosed with the available at the wel I/We confirm that I (Applicable for Mic abroad through approached in the province of the province	details, rules and regular prose of the contraventi pplicable laws enacted b onfirm that the funds in authorize the Mutual Fier action with such funds eting Schemes of variousivacy policy which is awa rovided by me to contained herein to its affiliatment products and offeabove mentioned parties of the Company. We do not have any exister of investment only) with proved banking channels ent to Axis Asset Managation pertaining to transe Customer Preference de my/our consent in accumber(s) (if provided) in a er(s) including demogragithe same in my/our folic (We have understood the instrums made by me/us in response made by me/us in response manage have read and understoon have read and understoon authorized and understoon authorized and understoon authorized and understoon authorized authorized and understoon authorized authoriz	ordance with Aadhaar Act, 2 ccordance with the Aadhaa phic information with the a	b. I/We hereby declaretions, Notifications or I tions, Notifications or I we leave the Marchael of the Marchae	that the amount in Directives of the properties of the applies disclosed to me/g recommended to by give consent to tuding but not limit or Third Party Servi alor transactional rotal authorities for the with the current 1 am/we are Non Non Resident Ordin me over phone, SM onal/ potential invaluate thereunder, for the properties of SEBI regulations made thereund panies of SEBI regulations with the FATCA & Cod the FATCA &	vested in the scheme ovisions of the Income or have been induced bustomer" process is ne plicant, at the applicatus all the commissions me/ us. I / we give my. the Company or its Auted to email, telephonice Providers in order elated information co compliance with any tapplication will resul Residents of Indian na ary / FCNR account. I / 15, email or any other restments and other or (i) collecting, storing der) and PMLA. I / Welgistered mutual fund (sc. CRS Instructions) and RS Terms and Conditionake to abide by the salthereby request yout	is through I Tax Act, A Ay any rebabot complete ble NAV pr (trail comr / our consection of the Nav provided from the Nav provided fr	legitimate source of until Money Laundering the origifts, directly of the origifts, directly of the origifts, directly of the sevalling on the date mission or any other ent to collect person gents and third party. In and further author in information and unovided by me can be culation in accordantate investments excertigin and that I/We in that details provided my consension of material irrefully a consension of the consen	nly and does not involve mg Laws, Anti Corruption in glaws, Anti Corruption in indirectly in making this atisfaction of the Mutual of such redemption and mode), payable to him for all data or information as yservice providers to use is ethe disclosure of the pdates to me on various e shared/transferred and exe with privacy policy as eeding ₹50,000 in a year nave remitted funds from led by me/us are true and intrelated queries and/or spective of my blocking thicating and (ii) updating thor sharing/disclosing of sfer Agent (RTA) for the nation provided by me/us eame. ed herein supercedes all urce scheme for amount
You/ Sole A	pplicant /Guardian	Second A	Applicant	ТІ	hird Applicant		Power of A	ttorney Holder
Date D D M	MYYYY	Place						

TERMS AND CONDITIONS FOR SMART SWITCH FACILITY

- 1. SMART SWITCH Facility ("the Facility") allows investors to first invest in the Source Scheme and then automatically Switch invested principle amount into scheme whose NFO is going on. The switch from source scheme to NFO scheme takes place on the last day of the NFO.
- $2. \quad Currently, Axis Money Market Fund will act as the Source Scheme. Investments would be allowed only under the Growth Option of these Schemes.$
- 3. In case of existing investments in any of the Source Schemes and additional purchase through this facility, the switch will be effected on FIFO basis and to the extent of the additional units purchased through this facility.

Example: Investor A (having exiting 5,000 units) in Axis Money Market Fund, done additional purchase of ₹ 150000 (15000 units appx) through Smart Switch. In that case, the switch out will be processed only for 15,000 units (refer point 3) and not for 20,000 units. Further, the switch- out of 15000 units will be done as per FIFO method, 5,000 units from existing investment + 10,000 units from Smart Switch Investments = 15,000 units irrespective of valuation (Gain/Loss) on switch out date.

- $4. \quad New/First Time Investors with Axis Mutual Fund are required to fill in the Application Form along with the SMART SWITCH Enrollment Form.$
- 5. Switch out will be subject to applicable taxes and exit Load, if any in the Source Scheme.
- 6. This facility is applicable for units held in non-demat mode.
- 7. The purchase/switch in application should meet the Minimum Application Amount requirement under each Scheme. In case, the minimum application amount requirement is not met, the application will be rejected.
- 8. Investments in the specified source schemes will be accepted till applicable cut off time for the respective schemes on July 08, 2024 and if the corresponding units in the source scheme are allotted on or before July 08, 2024, then the NFO switch will be executed on July 09, 2024. In case the units in the source scheme are allotted after July 08, 2024, the NFO switch will not be executed.
- 9. The enrollment form not complete in all respects is liable to be rejected. Axis Mutual Fund / Axis AMC reserves the right to reject any application without assigning any reason thereof.
- $10. \ \ Axis Mutual Fund/Axis AMC reserves the right to change/modify the facility or withdraw the facility at any given point in time.$
- 11. NFO switch (out) will be subject to availability of amount in source scheme, on the last day of ongoing NFO.

Fund Name & Benchmark	Product Labelling	Product Riskometer	Benchmark Riskometer	Potential Risk Class Matrix
AXIS MONEY MARKET FUND (An open ended debt scheme investing in money market instruments. A relatively low interest rate risk and moderate credit risk.) Benchmark: NIFTY Money Market Index A-I	This product is suitable for investors who are seeking*: Regular income over short term. Investment in money market instruments with maturity upto one year. Investors should consult their financial advisers if in doubt about whether the product is suitable for them.	Moderate Moderate High Sigh Low to Moderate Very High RISKOMETER Investors understand that their principal will be at low to moderate risk	Moderate Moderate High High Low to Noterate Very High RISKOMETER NIFTY MONEY MARKET INDEX B-I	Credit Risk → Relatively Low (Class A) Moderate (Class B) High (Class C)
AXIS NIFTY 500 INDEX FUND (An Open-Ended Index Fund tracking Nifty 500 TRI) Benchmark: Nifty 500 TRI	This product is suitable for investors who are seeking*: • Long term wealth creation solution. • An index fund that seeks to track returns by investing in a basket of Nifty 500 TRI stocks and aims to achieve returns of the stated index, subject to tracking error. *Investors should consult their financial advisers if in doubt about whether the product is suitable for them.	Noderate Low to Moderate High High Very High RISKOMETER Investors understand that their principal will be at very high risk	Moderate Moderate High High High Noderate Noderate Nifty 500 TRI	