

## **APPLICATION FORM**

**APPLICATION NO.** 

## **AXIS NIFTY500 MOMENTUM 50 INDEX FUND**

(An Open-Ended Index Fund tracking Nifty500 Momentum 50 TRI)

NFO OPENS: JANUARY 24, 2025 AND NFO CLOSES: FEBRUARY 07, 2025

FOR FIRST TIME INVESTORS FOR LUMPSUM INVESTMENTS / SIP INVESTMENTS.

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
ANN	ANN	30B-Blokel/30HD		Code	CODE	Registration) (Namber	& Time Stamp
scheme(s) of Axis Mutua	al Fund under Direct Plan I/V	Ve hereby give my/our consent to	o share/provide the tra	nsactions data feed/nor	rtfolio holdings/NAV etc in	 he service rendered by the distribu nrespect of my/our investments un ect Plan. I/We hereby give my/ou ntioned SEBI Registered Portfolio	der Direct Plan of all schemes of
I/We hereby cont person of the above o	firm that the EUIN box ha distributor/sub broker or	s been intentionally left bla notwithstanding the advice	nk by me/us as this to of in-appropriatene	ransaction is execute ss, if any, provided by	ed without any interaction the employee/relation	on or advice by the employee/ ship manager/sales person of t	relationship manager/sales :he distributor/sub broker.
You/ Sole Ap	oplicant /Guardian	Second A	pplicant	Т	hird Applicant	Power of A	attorney Holder
Unit Holding	Option	Physical Mode Dema	t Mode (in case of [	Demat, please fill sec 7	")		
01 🙏   M	IY DETAILS (To be f	illed in Block Letters. Please p	rovide the following o	details in full)	(In case of inve	stment "On behalf of minor", Ple	ase refer instruction No. 11)
Existing folio num	ber				☐ I/ We want t	to create new Folio (Instructi	on No. 26)
My Name (Should r	match with PAN Card)					PAN/PEKRN (1st A	pplicant) KYC
My Guardian's Na	ume (if minor)/POA/Con	tact Person (For Non-indivi	duals)			PAN/PEKRN (Guar	dian/POA) KYC
Iviy Guardian siva	ine (il millor)/ P OA/CON	tact r er son (r or Non-marvi	uuaisj			PART ERRIVIGUA	ulail/FOA) KTC
On behalf of Mind	or (*Attach Mandatory Doo	cuments as per instructions)	Date of Bir	th Minor's	D M M Y Y	Y Y Date of B	irth Proof attached*
<b>Guardian</b> named i	s Father M	other Court Appoi	nted		Guardiar	named is	
02 . Jo	DINT APPLICANT	S (IF ANY) DETAILS	S				
Mode of Operation				(Joint applicant de	tails not to be filled in	a case of minor investments)	
2nd Applicant Na	me (Should match with PA	N Card)				PAN/PEKRN (Seco	nd applicant) KYC
2nd Annlinent No.		ALC:l				DAN/DEI/DN/Th	
эги Аррисант ман	me (Should match with PA	in Card)				PAN/PEKRN (Third	applicant) KYC
MFD / EUIN holde	er/ sub-distributor is no	ot related to the 1st holde	r. 🗀 🗀 🗀	e Children	Ciblinas	Descrite	
If yes, declare that jo	int holders details provided	d in this form belongs to (tick a	any one): Spous	e Children	Siblings	Parents	
03 원   M	IY CONTACT DET	TAILS (As per KYC records	. To be filled in Block	Letters)	(Fo	or electronic communication, Ple	ase refer instruction No. 17)
Address Type (Mar	ndatory) Residen	tial & Business Res	idential B	usiness R	egistered Office		
Address							
City			C+-+-			Dia Cada	
Oity Add overseas add	ress (Mandatory for NRI /		State			Pin Code	
Add over seas add	1 ess (Mandatory for MR1/	т п дрисанся					
City			Country			Pin Code	
	umber should pertain to First	t Holder only.	, L	F			
Mobile No.		Tel No.		Email ID (CAPITAL letters only)			
I declare that Ema	ail address provided in this for	rm belongs to (tick any one):		ouse Dependent usage of these contact	Children Dependent Details for any communicat		ts Guardian PMS
	pile Number provided in this f		and approve for	ouse Dependent ousage of these contact	Children Dependent details for any communicat		ts Guardian PMS
		then (Self) option is considered	· ·	Online (Preferred	& Default) Physical Co	opy (Choose online mode to hel towards a greener & cleane	p us save paper & contribute r environment.)
04   B	ANK ACCOUNT I	<b>DETAILS</b> (Avail Multiple	Bank Registration Fa	icility)		(Please note that as per SEBI Re o provide their bank account det	
My Bank Name					IIIVESTOI'S CO	o provide their bank account det	ans. Refer fristruction (No. 0)
Bank A/C No.				A/C Type Sa	vings Current	NRE NRO FCNR	Others
Branch Address							
City			State			Pin Code	
IFSC code: (11 digit	:)		MICR code (9	digit)			ext to your cheque number)
LEI Code			Valid u	ıp to D D M	M Y Y Y	Note: LEI code mandatory to p equal to or exceeds ₹ 50 crore	rovide if transaction value is limit, with LEI proof.

	$\mathbb{R}^{ \mathcal{S} }$ $\mid$ MY INVESTMENT DETA	AILS			(For in	nvestments, Please	refer instruction No. 1 & 2:
	==: c/DD should be in favour of "Scheme Name". De the drawn favouring "Axis MF Multiple Schemes		n will be applied incase of no informati	ion, ambiguity or d	discrepancy). If the investment	is in multiple schen	nes. "The Cheque/ DD
	Full Scheme/Plan/Option		Amount/Each SIP Amount	Frequency	SIP Period		P-UP Facility hly available for Monthly SIP
	MPSUM SIP		₹	Daily	Start Date	% Top-Up	Fixed Amount
Plan	Regular Direct		Less DD charges	Weekly	End Date	(in multiple of 5 only	
Schem Name	ne		SIP Date Refer Inst. 13 B	B Day Monthly	M M Y Y Y	Frequency Half Yearly	v -
			D D (1 <sup>st</sup> to 28 <sup>th</sup> )	(default)	Maximum Duration	Yearly	<u> </u>
Option	1		Last date of month	Yearly	of 40 years	D	ynamic TOP-UP
LUI	MPSUM SIP		₹	Daily	Start Date	☐ % Top-Up	Fixed Amount
Plan	Regular Direct		Less DD charges	Weekly	MMYYYY	(in multiple of 5 only	)
Schem	ne		SIP Date Refer Inst. 13 B	Day	End Date	Frequency	in words
Name			D D (1 <sup>st</sup> to 28 <sup>th</sup> )	Monthly (default)		Half Yearly Yearly	y
Option	ı		Last date of month	Yearly	Maximum Duration of 40 years	<u> </u>	⊥ ynamic TOP-UP
LUI	MPSUM SIP		₹	Daily	Start Date	☐ % Top-Up	Fixed Amount
Plan	Regular Direct		Less DD	Weekly	M M Y Y Y		
Cchom			charges SIP Date Refer Inst. 13 B	Day	End Date	(in multiple of 5 only Frequency	in words
Schem Name				Monthly	M M Y Y Y	Half Yearly	y
Option			Last date of month	(default) Yearly	Maximum Duration	Yearly	· TOP UP
	of multiple selection, SIP Top Up will be register	red with 'Fixed A			of 40 years	D	ynamic TOP-UP
	imum Top-up amount is ₹ 1/- and in multiple of	₹1/-for all schem	es except Axis ELSS Tax Saver Fund the	e minimum amour	nt is ₹ 500/- and in multiples of	1	
	<ul> <li>Payment through NACH (Attach NACH</li> <li>OR Documents attached to avoid Thi</li> </ul>	_	OTM Reference No.	Bank Certificate	e for DD Third Party	(if one time manda Declarations	ate are registered)
Payme	ent Details		Ent rejection, il applicable.	Tank Ger timeate	z, ioi zz rimararty	Decidiations	
First C	heque Date D D M M Y	Y Y Ar	nount		Che	eque No.	
Bank N	lame		Account N	No.			
IFSC C	ode		MICR Coo	de et			
RTGS/	NEFT/ Funds Transfer				If source of payment ban	ık is same as abov	ve bank details tick her
06	🗐   NOMINATION DETAILS	5			(F	For nomination, Ple	ase refer instruction No. 18
ANN	NEXURE - A		Format for Providing	Nomination	n		
	vish to make a nomination and do hereby	nominate the	following person(s) who shall red	ceive all the ass	sets held in my / our accour	nt in the event of	my / our death.
Sr. No.	Nomination can be made upto three nominees in the account.	Deta	ils of 1st Nominee	Details of	f 2nd Nominee	Details of	f 3rd Nominee
		I	Mandatory Det	ails			
1.	Name of the nominee(s) (Mr./Ms.)*						
2.	Share of each   Equally (If not equally, please specify percentage)						
	Picase specify percentage/		%		%		%
. 3			% Any odd lot after division sł	hall be transferr		entioned in the fo	
3. 4.	Relationship with the Applicant  Minor Date of birth			hall be transferi		entioned in the fo	
	Relationship with the Applicant			hall be transferi		entioned in the fo	
4. 5.	Relationship with the Applicant Minor Date of birth	provided in cas	Any odd lot after division sl	hall be transferi		entioned in the fo	
4. 5.	Relationship with the Applicant  Minor Date of birth  Guardian name  te of Birth and Name of Guardian to be p	provided in cas	Any odd lot after division sl			entioned in the fo	
4. 5.	Relationship with the Applicant Minor Date of birth Guardian name	provided in cas	Any odd lot after division sl			entioned in the fo	
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understood the terms, condition source only and does not involve Act, Anti Money Laundering Law been induced by any rebate or g "Know Your Customer" process Scheme, in favour of the applicant he law.) The ARN holder has dir Mutual Funds amongst which the policy which is available on the information/data provided by m disclosure of the information and undates to me on various	gifts, directly or indirectly in ma is not completed by me/us to th	aking this i e satisfacti	nvestme ion of the	nt. I/We co Mutual Fu	onfirm tha und, (I/we l	it the fundered	ds invest ithorize	ted in the the Muti	e Schem ual Func	ne, leg d, to re	ally be deem	elongs to the func	me Is in	/us. In /ested	event in the		Y Applica	ou/ S ant /	
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# APPLICATION SUPPORTED BY BLOCKED AMOUNT (ASBA) FORM

## **AXIS NIFTY500 MOMENTUM 50 INDEX FUND**

(An Open-Ended Index Fund tracking Nifty500 Momentum 50 TRI)

NFO OPENS: JANUARY 24, 2025 AND NFO CLOSES: FEBRUARY 07, 2025

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Name and	SUB-Distributor	EUIN	PMR (Portfolio Manager's	SCSB	SCSB IFSC Code	Syndicate Member Code	SI No.
AMFI Regn No.	ARN		Registration) Number ^^			,	
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	oplicant /Guardian		Applicant		d Applicant	Power of Attorney	
NAME OF FIR	RST APPLICANT (N	lame should be as availa	able in Demat Account)				
Mr. Ms. M/s.	STAIT EICANT	danie snodia be as avanc	asie in Bernat / tecoarit,				
Folio Number			(If you have an existin	ng folio number, ple	ease mention the number he	re)	
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Branch Name whe	re account is held						
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CONTACT DE	TAILS - FIRST APF	PLICANT/GUARD	IAN/CORPORATE	(PO Box addres online facility.)	s is not sufficient. Mob	le number and email is manda	ory to avail
Contact Person (In	case of non Individual In	vestor)					
Address					City		
State			Pincode		Landline No		
AXIS MUTUAL F	UND ACKNOW	LEDGMENT S	LIP (to be filled in	n bv the ir	vestor)	APPLICAT	ION NO.
AXIS NIFTY500	MOMENTUM 50 IN			,	,,	Date D D M M	Y Y Y Y
Received from Mr /	'Ms / Mrs / M/s			a	n application for purch		
AXIS NIFTY500	MOMENTUM 50 IN	DEX FUND					
SCSB Account deta	ails: Account No.						
Bank Name			Branch				
Total Amount to be	e blocked	In figures		in wo	ords		
Time of receipt						SCSB Stamp,	Signature

#### **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" on 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 of Axis Mutual Fund. 3) In case the amount available in the bank account specified in the application is insufficient for blocking the amount equivalent to 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 redemption 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.

Signature of Bank Account Holders	

#### 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. SELFCERTIFIED 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") is maintained. 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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UBO Declaration (Mandatory for a	II entities except, a Publicly Traded (	Compa	iny or a related enti	ity of Publicly	Traded Co	mpany)		
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applicable category)			Religious		Others			
Please list below the details of control EACH controlling person(s). (Please at		ies of t	ax residency / perm	nanent residen	cy/citizen	ship and ALL Tax Id	entification	Numbers for
Owner-documented FFI's should provi	de FFI Owner Reporting Statement an	d Audi	tor's Letter with requ	uired details as	mentioned	d in Form W8 BEN E	(Refer 3(vi)	of part C)
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	FATCA - C	CRS Te	rms and Conditions	i				
The Central Board of Direct Taxes has to seek additional personal, tax and be will have to be reported to tax authori agents for the purpose of ensuring app. Should there be any change in any info Please note that you may receive mo important that you respond to our req If you have any questions about your please include United States in the for. \$It is mandatory to supply a TIN or fu issued, please provide an explanation and the supplementations.	eneficial owner information and certa ties/appointed agencies. Towards cor propriate withholding from the accour rmation provided by you, please ensur the than one request for information uest, even if you believe you have alrea tax residency, please contact your tax eign country information field along want unctional equivalent if the country in	in cert nplian it or ar e you if you ady su c advis ith the	ifications and docur ce, we may also be rey y proceeds in relation advise us promptly, i have multiple relation polied any previous! sor. If any controlling US Tax Identification	mentation from equired to provon thereto. i.e., within 30 daily some size on ships with A yrequested infig person of the on Number.	n all our accivide informays.  Axis Mutua formation.  e entity is a	count holders. In re nation to any institu al Fund or its grou n US citizen or resid	levant cases tions such as o entities. The ent or greer	i, information swithholding nerefore, it is n card holder
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#### **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
    - (i) 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 RetirementFund; a Narrow Participation RetirementFund; or a Pension Fund of a Governmental Entity, International Organizationor 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 International 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 (in 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 fund 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 Financial 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 reorganizing with the intent to continue or recommence operations in a 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 in 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 shareholders or members who have a proprietary or beneficial interest in its income or assets;  The shareholders or members who have a proprietary or beneficial interest in its income or assets;  The shareholders or members who have a proprietary or beneficial interest in its income or assets;  The shareholders or members who have a proprietary or beneficial interest in its income or assets;  The shareholders or members who have a proprietary or beneficial interest in its income or assets;  The shareholders or members who have a proprietary or beneficial interest in its income or assets;  The shareholders or members who have a proprietary or beneficial interest in its income or assets;  The shareholders or members who have a proprietary or beneficial interest in its income or assets;  The shareholders or members who have a proprietary or beneficial interest in its income or assets;  The shareholders or members who have a proprietary or beneficial interest.
	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 of 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:-
	(1) an Investor Protection Fund referred to in clause (22EA).
	(I) an Investor Protection Fund referred to in clause (23EA);
	(II) a Credit Guarantee Fund Trust for Small Industries referred to inclause 23EB; and

#### 3. 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

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Code	Sub-category
А	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 $1.1472-1(c)(1)(I)$
Е	A corporation that is a member of the same expanded affiliated group as a corporation described in Reg. section 1.1472- $1(c)(1)(1)$
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	Areal 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
K	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



# 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.

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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.

Distributor ARN	SUB-Distributor ARN	Internal SUB-Broker/Sol ID	EUIN	Employee Code	RIA CODE^	PM Registr	R (Portfolio Manager's ation) Number ^^	Serial No., Date & Time Stamp
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2. SIP DETAILS		SIP Registration Mod	de 🗌 A-OTM 📗 I	K-OTM Mandate along with SIP form
OTM Reference No.				
Scheme / Plan / Option	Frequency (DD) (Ref Inst. no. 5) (Ref Inst. no. 5)	nrollment Period (MMYY)	SIP Amount	TOP-UP Facility (Optional) Only available for Monthly SIP    % Top-Up
	**Daily From (1" to 28")	₹	in figures	%   %
	*Monthly	aximum Duration of 40 years —	in words	Half Yearly Yearly
	**Daily From  #Weekly (1" to 28") To	₹	in figures	% Top-Up Fixed Amount  % in figures  (in multiple of 5 only)  Frequency  in words
	*Monthly	aximum Duration of 40 years —	in words	Frequency inwords  Half Yearly Yearly
	**Daily From (1" to 28") To	₹	in figures	% Top-Up   Fixed Amount     %   %       (in multiple of 5 only)
		aximum Duration of 40 years —	in words	Frequency inwords  Half Yearly Yearly
In case of multiple selection, SIP Top Up will SIP minimum Top-up amount is ₹ 1/- and in m SIP initial payment details (Optional)			ninimum amount is ₹ 500/- and	in multiples of ₹ 500/- thereafter.
Drawn on bank / branch name			Amoun	t
Mode Cheque/DD Cheque	/DD	Dated	D D M M Y	YYY
In case of multiple SIP, mention "Axis I	MF Multiple Schemes" on the paym	ent instrument.		
3. Declaration and Signature (t	o be signed by all unit holders	if mode of holding is	s 'joint')	

 $I/We declare that the particulars furnished here are correct. \\ I/We authorize Axis Mutual Fund acting through its service providers to debit my/our bank account towards payment of SIP installments and/or any lumpsum payments through an Electronic Debit arrangement/NACH (National Automated Clearing House) as per my request from time to time. If the transaction is delayed or not effected at all for reasons of incomplete or incorrect information, \\ I/We would not hold the user institution responsible. \\ I/We will also inform Axis Mutual Fund about any changes in my bank account. \\ I/We hereby authorize to honour such payments and have signed and endorsed the Mandate Form. \\ Further, \\ I authorize my representative (the bearer of this request) to get the above Mandate verified. \\ Mandate verification charges, \\ if any, may be charged to my/our account. \\$ 

You/ Sole Applicant / Guardian Second Applicant Third Applicant

#### INSTRUCTIONS FOR SIP & TOP-UP

\*Yearly

- Multiple SIP registration facility is not available for Axis Children's Fund, ETF schemes and during NFO Axis Nifty500 Momentum 50 Index Fund - For digital mode, SIP will commence from 20th February 2025. For physical mode, SIP will commence from 6th March 2025.
- $2. \hspace{0.5cm} \textbf{OTM} \, end \, date \, cannot \, be \, more \, than \, 40 \, years \, form \, the \, date \, of \, the \, mandate.$
- 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. 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.
- 5. \*Investor shall have the option of choosing any date. In case the selected date falls on a Non-Business Day or on a date which is not available in a particular month, the SIP will be processed on the immediate next business day/date. If SIP debit date is not mentioned default date would be considered as 7th of every month. If the SIP date falls on a non-business day or a bank holiday, the SIP debit will be processed on the following business day. \*\* 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.
- 6. Please refer below table for minimum installments:

  \*\*Daily/#Weekly/\*Monthly

	Dany, "	***	KIY/ I	violitiliy	Tearry					
	Min.₹	٤	N	∕lin Inst.	Min.	₹	M	1in Inst.		
All schemes, except ETFs & schemes mentioned in tables below.	100			6	1200	0		3		
	**Daily/#	#Wee	kly	*Moi	nthly		*Ye	early		
	Min.₹	Min Inst.		Min.₹	Min Inst.	Mi	n.₹	Min Inst.		
Axis Overnight Fund & Axis Liquid Fund	1000	6	5	NA	NA N		Α	NA		
Axis ELSS Tax Saver Fund*	NA	N.	Α	500	6	60	00	3		
Axis Banking & PSU Debt Fund, Axis Children's Fund, Axis Credi Risk Fund, Axis Dynamic Bond Fund, Axis Equity ETFs FoF, Axis Floater Fund, Axis Gift Fund, Axis Money Market Fund, Axis Retirement Fund, Axis Short Duration Fund, Axis Silver Fund Of Fund, Axis Treasury Advantage Fund, Ultra Short Duration Fund	nd, 100 6 100 edit d d und, is		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 AXIS CRISIL-IBX AAA NBFC INDEX – JUN 2027 FUND			A	1000	6	N	Α	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	N.	A	1000	6	120	000	3		

Note: For all schemes, minimum amount is as per above table and thereafter in multiple of ₹ 1. For Axis ELSS Tax Saver Fund Minimum amount is as per above table and thereafter in multiple of ₹ 5.00\*

- $7. \hspace{0.5cm} \textbf{If no amount is mentioned minimum SIP in stallment amount would be considered.} \\$
- 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 Z 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. Revised timeline for SIP cancellation is T+2 working days. Any transaction presented before cancellation, shall be processed.
- ${\bf 11.} \quad {\sf Mandate\,will\,be\,processed\,through\,NACH\,platform\,offered\,by\,NPCI.}$
- 11. Investor will not hold Axis Mutual Fund, its registrars and other service providers responsible if the transaction is delayed or not effected or the investor bank account is debited in advance or after the specific SIP date due to various clearing cycles of NACH Debit/ Local/Bank holiday. Axis Mutual Fund, its registrars and other service providers shall not be held responsible or liable for damages / compensation / loss incurred by the investor as a result of using the SIP or ECS / Auto debt facility. The investor assumes the entire risk of using this facility and takes full responsibility.
- 13. 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.
- 14. 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 application form for availing the SIP Top-up facility should be submitted 21 days before the first SIP instalment date.
  - The minimum amount for SIP Top-up facility is Re 1- and in multiples of Re 1/- for all schemes
    offering SIP facility; except Axis ELSS Tax Saver Fund, where the minimum amount for SIP Top-up
    is Re 500 and in multiples of Rs 500 thereafter.
  - The minimum Top-up percentage is 5% of the SIP amount and in multiples of 5% thereafter for all schemes offering SIP facility. Currently, percentage based SIP Top-up is available for physical mode. The percentage based SIP Top-up is unavailable for Axis ELSSTax Saver Fund.
  - $\bullet \quad \mathsf{Percentage}\,\mathsf{SIP}\,\mathsf{Top}\,\mathsf{-up}\,\mathsf{would}\,\mathsf{be}\,\mathsf{computed}\,\mathsf{on}\,\mathsf{the}\,\mathsf{immediately}\,\mathsf{preceding}\,\mathsf{SIP}\,\mathsf{instalment}\,\mathsf{amount}.$
  - In case of discrepancy in the Top-Up amount/percentage, SIP will be registered without Top-Up Facility.
  - $\bullet \quad \text{Top-up frequencies available are Half-Yearly/Yearly/ Dynamic (i.e. as and when requested)}.$
  - In case Top-Up frequency is not indicated, it will be considered as Yearly by Default.
  - The Top-up date will correspond to the date of registered SIP.
  - Top-up will continue till the end of the SIP tenure by default.
  - In case of Dynamic Top-up option, the gap between SIP registration and first Top-Up request should be at least 6 months and subsequently the gap between two Top-up requests should be at least 3 months.
  - No modification can be made to SIP Top-up frequency / amount / percentage during the SIP tenure. SIP Top-up facility can be discontinued only by cancelling 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



Folio No.

Amount

From Scheme

# **SYSTEMATIC TRANSFER PLAN (STP)**

ARN	SUB-Distributor ARN	Internal SUB-Broker/Sol ID	EUIN	Employee Code	RIA CODE^	PMR (Portfolio Mana Registration) Numbe	r^^ & Time S
pfront commission sh heme(s) of Axis Mutu kis Mutual Fund, to th	all be paid directly by the inve al Fund under Direct Plan. I/V ne above mentioned SEBI Re	estor to the AMFI registered di Ve hereby give my/our consent gistered Investment Adviser.	stributor based on the i to share/provide the tra ^^I/We, have invested	investor's assessment of ansactions data feed/por I in the scheme(s) of Axi	various factors including the tfolio holdings/NAV etc. in s Mutual Fund under Dire	ne service rendered by the respect of my/our investm ct Plan. I/We hereby give	distributor. ^I/We, have in ents under Direct Plan of my/our consent to share
ansactions data feed/	/portfolio holdings/ NAV etc.	in respect of my/our investme s been intentionally left bla	nts under Direct Plan o	of all schemes of Axis Mui	tual Fund, to the above men	itioned SEBI Registered Po	ortfolio Manager.
erson of the above	distributor/subbrokeror	notwithstanding the advic	e of in-appropriaten	ess, if any, provided by	the employee/relations	ship manager/sales per	son of the distributor/s
You/ Sole A	pplicant /Guardian	Second	Applicant	Т	hird Applicant	Powe	er of Attorney Hol
1 Applic	ant Details	'			Folio No.	<u> </u>	
Sole / 1st Ui							
Guardian's I	Name	First Name			Middle Name		Last Name
(as case of mino 1st Holder		Applicant	2nd Holder		Applicant		
PAN 3rd Holder		Applicant	PAN	2110	Applicant		
PAN							
		ER PLAN (STP) (To	be submitted at	least 4 working	days before the 1st		
From Scheme						Plan Dire	ect Regular
Option (tick	✓) ☐ Growth	☐ IDCW Reinves	tment	☐ IDCW Payout	: IDCW Fr	equency	
To Scheme						Plan Dire	ect 🗌 Regular
Option (tick	✓) ☐ Growth ☐	IDCW Reinvestment	☐ IDCW P	ayout	IDCW Fr	requency	
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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.

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

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 STP Form, failing which the STP shall be registered as per No. of Instalments mentioned.
- 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																										
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PAN																										
I/We hereb for religious trust or a so the section	s or char ociety un	itable der tl	e purpo he Soci	ses re eties F	ferred Registr	l to in o	clause Act, 1	e (15)	of se	ction	12 o	f the	Inco	ome	-tax	Act	, 19	61 (4	43 of	f 19	<b>61</b> ), i	and i	is re	giste	red as	s a
Enclosed re	levant d	ocum	entary	proof	evider	ncingt	the ab	ove d	lefini	tion.																
Wefurtherconf	We further confirm that we have registered with DARPAN Portal of NITI Aayog as NPO and registration details are as follows:																									
Registration Nu	mber of	DARI	PANpo	rtal																						
If not, please reg MF/AMC/RTAw																								tion	detai	ls,
I/We hereb PMLA Act/l				bove s	tated	entit	y / org	ganiz	atior	ı is <b>N</b>	ОΤ	fallir	ng ur	nder	· No	n-p	rofit	org	aniz	atio	n as	def	ined	abo	ve or	in
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# **SMART SWITCH FACILITY**

## **ENROLMENT FORM**

(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 (Portfi Registration) N	olio Manager's lumber ^^	Serial No., Date & Time Stamp
scheme(s) of Axis Mutua Axis Mutual Fund, to the transactions data feed/p	I Fund under Direct Plan. I/We above mentioned SEBI Reportfolio holdings/NAV etc. irm that the EUIN box ha	stor to the AMFI registered dist /e hereby give my/our consent to gistered Investment Adviser. ^/ inrespect of my/our investment s been intentionally left blar notwithstanding the advice	share/provide the transa I/We, have invested in th sunder Direct Plan of all s Ik by me/us as this trans	ctions data feed/portfi ne scheme(s) of Axis I schemes of Axis Mutus saction is executed	folio holdings/NAV etc. Mutual Fund under Di al Fund, to the above m without any interact	in respect of my/our rect Plan. I/We her entioned SEBI Regi tion or advice by t	investments under eby give my/our of stered Portfolio N :he employee/ re	er Direct Plan of all schemes of consent to share/provide the flanager. elationship manager/sales
You/ Sole Ap	plicant /Guardian	Second A	pplicant	Thi	ird Applicant		Power of At	torney Holder
01 INVESTOR	DETAILS							
Existing folio nur	mber			PAN/PEKRN	(1st Applicant)			
My Name								
02 SCHEME [	DETAILS (for Lumpsum	investment / Switch Out Scho	eme) (Purchase applicati	ons would be accept	ed only upto applicab	ole cut -off timings	on February 06,	2025.)
Scheme name (Please ✓ choice o	f Scheme) Axis	Overnight Fund						
<b>Plan</b> (Please ✓ choice o	f Scheme) Regi	ular Plan 🔲 Dire	ect Plan		Option	<b>√</b> Gro	wth Option	
03 INVESTME	ENT DETAILS							
DD/Cheque No	).	NEFT/ RTGS/ F	und Transfer		One Tim	ne Mandate (C	OTM)	
Amount ₹ (in fig	cures)		₹ (in words)					
Dated	D D M I	M Y Y Y Y	Bank & Branch					
04 SWITCH -	IN SCHEME DETAII	LS						
Scheme name	AXIS NIFTY500	MOMENTUM 50 INDI	EX FUND			Plan	Regular Plan	Direct Plan
Option	Growth Option							
	l understood the te	rms & conditions of SN	MART SWITCH Fa	cility.				
Having read and un terms, conditions, designed for the pu Laws or any other a investment. I/We co Fund, (I/we hereby undertake such oth the different comperescribed in the prinformation contain financial and invest disclosed with the available at the web I/We confirm that I/(Applicable for Miciabroad through appropriect.) I/We give my considered with the I/We hereby provious preferences with the I/We hereby provious of updating CERTIFICATION: I on this Form is true, I/We have read an previous nomination Declaration: I/We)	derstood the content of details, rules and regulat rpose of the contraventic pose of the contrav	the SID / KIM of the scheme ions governing the scheme. on of any Act, Rules, Regulat / the Government of Indiafrested in the Scheme, legally und, to redeem the funds im that may be required by the Mutual Funds amongst whilable on the website of the Att me through any channel es/group companies or theiring of other services. I/We is including with any regulating Micro SIP/Lumpsum invyour fund house. For NRIs your fund house. For NRIs wor from funds in my/our Notes and the segistration Facility.  Registration Facility.  Ordance with Aadhaar Act, 2 ccordance with Aadhaar Act, 2 ccordance with the Aadhaar Act, 2 choice information with the as the scheme in the Aadhaar Act, 2 ccordance with Company Limited and the Aadhaar Act, 2 ccordance with Aadhaar Act, 2 ccordance with Aadhaar Act, 2 ccordance with Company Limited and the Aadhaar Act, 2 ccordance with Aadhaar Act, 2 ccordance with Aadhaar Act, 2 ccordance with Company Limited and the Aadhaar Act, 2 ccordance with Company Limited and the Aadhaar Act, 2 ccordance with Company Limited and the Aadhaar Act, 2 ccordance with Company Limited and the Aadhaar Act, 2 ccordance with Company Limited and the Aadhaar Act, 2 ccordance with Company Limited All Aardhaar Act, 2 ccordance with Aadhaar Act, 2 ccordance with Limited All Aardhaar Act, 2 ccordance with Aadhaar Act, 2 ccordance with Limited All Aardhaar Act, 2 ccordance with Aadhaar	I/We hereby declare to ions, Notifications or Eom time to time. I/we helongs to me/us. In exested in the Scheme, i law,) The ARN holder hethe Scheme is being, MC / Fund. I/We here of communication inche for the scheme is being, and the scheme is being, and the scheme is being, and the scheme is being, MC / Fund. I/We here of communication incheroused Agents on agree that all personatory, statutory or judic estments which togeth nly-1/We confirm than a Resident External / N dits agents to contact cransactions/ promotic of the scheme of the scheme of the scheme of this Form (read along naveread and understobelow/overleaf and I/above.  T SWITCH Facility on:	that the amount involventives of the proave not received no vent "Know Your Ct in favour of the appas disclosed to me/s; recommended to to give consent to tuding but not limiter Third Party Servi lor transactional reial authorities for mer with the current tlam/ we are Nonflon Resident Ordinions made thereunder, for ions made thereunder, for ions made thereunder, for ions made the panies of SEBI region gwith the FATCA & CR We hereby undertaforesaid page and	vested in the schemovisions of the Incomor have been induced ustomer" process is blicant, at the applicus all the commission me/ us. I / we give m he Company or its Aed to email, telepho ce Providers in ordelated information ocmpliance with an tapplication will resi Residents of Indian rary / FCNR account. IS, email or any other estments and other (i) collecting, storinder) and PMLA. I / Wistered mutual fund CRS Instructions) are STerms and Conditiake to abide by the Intereby request you work and the control of the condition of	e is through legit ine Tax Act, Anti M Iby any rebate or not completed by able NAV prevail as (trail commission) of the complete of the comple	imate source o loney Laundering gifts, directly or me/us to the sing on the date on or any other in collect person and third party further author ormation and ug dby me can be on in accordance westments exceed and that I/We hat details provides my investment of material irresultidating/authen my/our consent in that the informate by accept the actions contained the sallotted in soit sallotted in soit mere with the sallotted in soit sallotted in soit mere in the sallotted in soit mer	nly and does not involve ng Laws, Anti Corruption indirectly in making this atisfaction of the Mutual of such redemption and node), payable to himforal data or information as service providers to use is the disclosure of the dates to me on various shared/transferred and the with privacy policy as eading ₹50,000 in a year awe remitted funds from the date of the dates and/or spective of my blocking ticating and (ii) updating for sharing/disclosing of sfer Agent (RTA) for the dation provided by me/us same.
You/ Sole A	pplicant /Guardian	Second A	pplicant	Th	nird Applicant		Power of At	torney Holder
Date D D M	M Y Y Y Y	Place						