

Name of the scheme

Motilal Oswal BSE 1000 Index Fund
(An open-ended fund replicating/tracking the BSE 1000 Total Return Index)

This product is suitable for investors who are seeking*

- Return that corresponds to the BSE 1000 Total Return Index, subject to tracking error
- Long-term capital growth

*Investors should consult their financial advisers if in doubt about whether the product is suitable for them.

Risk-o-meter of Scheme



The risk of the scheme is Very High

Risk-o-meter of Benchmark



The risk of the Benchmark is Very High

Application No.

Form-1



New Fund Offer / On Going Application Form Motilal Oswal BSE 1000 Index Fund

(An open-ended fund replicating/tracking the BSE 1000 Total Return Index)
New Fund Offer Price: ₹ 10/- Per Unit

NFO Opens on: June 5, 2025 NFO Closes on: June 19, 2025 Please read the Scheme Information Document / Key Information Memorandum of the Scheme and instructions carefully.

Distributor ARN / RIA#	Distributor Name	Sub-Distributor ARN	Internal Sub-Broker/ Employee Code	EUIN
ARN/RIA-		ARN-		

#By mentioning RIA code, I/We authorize you to share with the SEBI Registered Investment Advisor the details of my/our transactions in the scheme(s) of Motilal Oswal Mutual Fund.

Investors applying under Direct Plan must mention "Direct" in ARN Column

Upfront commission shall be paid directly by the investor to the AMFI registered distributor based on the investor's assessment of various factors including the service rendered by the distributor.

☐ "I/We hereby confirm that the EUIN box has been intentionally left blank by me/us as this transaction is executed without any interaction or advice by the employee/relationship manager/sales person of the above distributor/sub broker or notwithstanding the advice of in-appropriateness, if any, provided by the employee/relationship manager/sales person of the distributor/sub broker."

First / Sole Applicant /
Guardian

Second Applicant

Third Applicant

Power of Attorney
Holder**TRANSACTION CHARGES FOR APPLICATIONS THROUGH DISTRIBUTORS ONLY**

(Refer Instruction 12 on page 5) In case the subscription amount is ₹10,000 or more and your Distributor has opted to receive Transaction Charges, the same are deductible as applicable from the purchase/ subscription amount and payable to the Distributor. Units will be issued against the balance amount invested.

Transaction Charges for
per subscription ₹ 10,000
and above

- ☐ Existing Investor - ₹100
☐ New Investor - ₹150

1 EXISTING INVESTOR'S DETAILS (Please fill your Folio No., Name, Section 1,7,10 &12)

Folio No. Name

2 FIRST APPLICANT'S DETAILS (Non-Individual investors should mandatorily fill separate FATCA Form Available on Website:www.motilaloswalmf.com.)

☐ Mr. ☐ Ms. ☐ M/s

Name

Father's Name

PAN /PEKRN** CIN

KIN (KYC identification number)

Date of Birth / Incorporation Place of Birth / Incorporation Country of Birth / Incorporation Nationality ☐ Indian ☐ US ☐ Others (Please Specify)

City of Incorporation

For Investments "On behalf of Minor"
(Refer Instruction 1d)

☐ Birth Certificate ☐ School Certificate ☐ Passport ☐ Others Specify

Guardian's Relationship ☐ Father ☐ Mother ☐ Court Appointed
With Minor

KIN of Guardian/ PoA (KYC identification number)

Name of the Guardian (In case of minor) / Contact person for non individuals / PoA holder name

Guardian / PoA PAN

Tax Residence Address (for KYC Address) ☐ Residential ☐ Registered office ☐ Business ☐ Residential or Business

Correspondence Address

City State Pin Code

Overseas address Mandatory incase of NRI's

Mandatory incase of NRI's

Email ID

Email ID & Mobile No. are essential to enable us to communicate better with you

** Please mention PAN/PEKRN(PAN Exempted KYC Reference Number) as it is mandatory

Mobile Tel.

3 KYC Details (Mandatory)

Tax Status ☐ Partnership Firm ☐ HUF ☐ Private Limited Company ☐ Public Limited Company ☐ Listed Company ☐ Society ☐ AOP/BOI ☐ Trust ☐ H Liquidator
☐ Artificial Juridical Person ☐ Resident Individual ☐ Proprietor ☐ Minor ☐ FII/ FPI ☐ NRI ☐ PIO ☐ Limited Liability Partnership ☐ Trust
☐ Body Corporate ☐ NGO ☐ FI ☐ Govt. Body ☐ Bank ☐ Defence Establishments ☐ NPO ☐ Others Specify
Occupation ☐ Pvt. Sector Service ☐ Public Sector ☐ Gov. Service ☐ Housewife ☐ Defence ☐ Professional ☐ Retired ☐ Business ☐ Agriculture ☐ Student ☐ Forex Dealer ☐ Others Specify

Gross Annual Income OR Net-worth* ☐ <1L ☐ 1-5L ☐ 5-10L ☐ 10-25L ☐ 25L-1CR ☐ >1CR

networth as on

Any other information

*Not older than one year

NON-INDIVIDUALS

networth as on

(Networth is mandatory for Non-individuals)

Any other information

Is the entity involved in any of the following:

- 1 Foreign Exchange/ Money Changer ☐ Yes ☐ No
2 Gaming / Gambling / Lottery ☐ Yes ☐ No
(casinos, betting syndicates)
3 Money Lending/ Pawning ☐ Yes ☐ No

Politically Exposed Person (PEP) Status (Also applicable for authorised signatories/Promoters/ Karta/ Trustee/ Whole time Directors)

☐ I am PEP ☐ I am Related to PEP ☐ Not Applicable

ACKNOWLEDGMENT SLIP

Received subject to realisation, verification and conditions, an application for purchase of Units as mentioned in the application form.

Application No.

From

Cheque no.	Date	Amount	Scheme
			Motilal Oswal BSE 1000 Index Fund

Stamp & Signature

9 FATCA AND CRS DETAILS FOR INDIVIDUALS (Including Sole Proprietor) (Mandatory)

Non-Individual investors should mandatorily fill separate FATCA Form Available on Website:www.motilaloswalmf.com. The below information is required for all applicants/guardian

	Place/City of Birth	Country of Birth	Country of Citizenship / Nationality		
First Applicant			<input type="checkbox"/> Indian	<input type="checkbox"/> U.S.	<input type="checkbox"/> Others (Please specify) _____
Second Applicant			<input type="checkbox"/> Indian	<input type="checkbox"/> U.S.	<input type="checkbox"/> Others (Please specify) _____
Third Applicant			<input type="checkbox"/> Indian	<input type="checkbox"/> U.S.	<input type="checkbox"/> Others (Please specify) _____

Are you a tax resident (i.e., are you assessed for Tax) in any other country outside India? Yes ☐ No ☐

If 'No' please proceed for the signature of declaration

If 'YES', please fill for ALL countries (other than India) in which you are a Resident for tax purposes i.e., where you are a Citizen / Resident / Green Card Holder / Tax Resident in the respective countries[#]

	Country of Tax Residency	Tax Identification Number or Functional Equivalent	Identification Type (TIN or other, please specify)	If TIN is not available, please tick (✓) the reason A, B, & C (as defined below)
First Applicant				Reason <input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C
Second Applicant				Reason <input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C
Third Applicant				Reason <input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C

Reason A: The country where the Account Holder is liable to pay tax does not issue Tax Identification Numbers to its residents. **Reason B:** No TIN required. (Select this reason Only if the authorities of the respective country of tax residence do not require the TIN to be collected). **Reason C:** Others; please state the reason thereof.

[#]Please attach additional sheets if necessary

10 NOMINATION DETAILS (Refer Instruction 10)

☐ PLEASE REGISTER MY/OUR NOMINEE AS PER BELOW DETAILS

Nominee Name*	PAN / DL / Passport Aadhaar (last 4 digits)*	Nominee DOB / Relationship with primary unitholder*	Share %*	Guardian Name and Relationship (In case of Minor)*	Email Id and Mobile No*	Address*
Nominee 1		<div>DDMMYY</div> <div>Relationship</div>		<div>Guardian Name:</div> <div>Relationship:</div>	<div>Email:</div> <div>Mobile:</div>	
Nominee 2		<div>DDMMYY</div> <div>Relationship</div>		<div>Guardian Name:</div> <div>Relationship:</div>	<div>Email:</div> <div>Mobile:</div>	
Nominee 3		<div>DDMMYY</div> <div>Relationship</div>		<div>Guardian Name:</div> <div>Relationship:</div>	<div>Email:</div> <div>Mobile:</div>	

FOR NOMINATION OPT-OUT: ☐ I/We DO NOT wish to make a nomination (Please tick (✓) if the unit holder does not wish to nominate anyone) *Mandatory section for Individuals (Single or Joint)
I / We hereby confirm that I / We do not wish to appoint any nominee(s) for my mutual fund units held in my / our mutual fund folio and understand the issues involved in non-appointment of nominee(s) and further are aware that in case of death of all the account holder(s), my / our legal heirs would need to submit all the requisite documents issued by Court or other such competent authority, based on the value of assets held in the mutual fund folio.

11 DECLARATION/CONSENT AND SIGNATURE

Having read and understood the contents of the Scheme Information Document of the Scheme(s), I/We hereby apply for the units of the scheme(s) and agree to abide by the terms, conditions, rules and regulation governing the scheme(s). I/We hereby declare that the amount invested in the scheme(s) is through legitimate Sources only and does not involve and is not designed for the purpose of the contravention of any Act, Rules, Regulations, Notifications or Directions 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 (s) & 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 (s), legally belong to me/us. In the 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(s), 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 Scheme 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 the details provided by me/us are true and correct. I declare that the information is to the best of my Knowledge, belief, accurate and complete. I agree to notify MOMF/AMC immediately in the event of information changes.

FATCA / CRS Certification:

Declaration for Individual: I hereby confirm that the information provided hereinabove is true, correct, and complete to the best of my knowledge and belief and that I shall be solely liable and responsible for the information submitted above. I also confirm that I have read and understood the FATCA & CRS Terms and Conditions below and hereby accept the same. I also undertake to keep you informed in writing about any changes / modification to the above information in future within 30 days of the same being effective and also undertake to provide any other additional information as may be required any intermediary or by domestic or overseas regulators/ tax authorities.

First / Sole Applicant / Guardian / POA	Second Applicant	Third Applicant
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We are falling under “ Non-Profit Organization ” [NPO] which has been constituted for religious or charitable purposes referred to in clause (15) of section 2 of the Income-tax Act, 1961 (43 of 1961), and is registered as a trust or a society under the Societies Registration Act, 1860 (21 of 1860) or any similar State legislation or a Company registered under the section 8 of the Companies Act, 2013 (18 of 2013).	<input type="radio"/> Yes <input type="radio"/> No
If yes, please quote Registration No. of Darpan portal of Niti Aayog	

If not, please register immediately and confirm with the above information. Failure to get above confirmation or registration with the portal as mandated, wherever applicable will force MF / AMC to register your entity name in the above portal and may report to the relevant authorities as applicable. We am/are aware that we may be liable for it for any fines or consequences as required under the respective statutory requirements and authorize you to deduct such fines/charges under intimation to me/us or collect such fines/charges in any other manner as might be applicable.

OTM Debit Mandate form NACH/ ECS/ Direct Debit

New Fund Offer / On Going Application Form

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Application No.

Form-2

Distributor ARN / RIA#	Distributor Name	Sub-Distributor ARN	Internal Sub-Broker/Employee Code	EUIN
ARN/RIA :		ARN		

#By mentioning RIA code, I/We authorize you to share with the SEBI Registered Investment Advisor the details of my/our transactions in the scheme(s) of Motilal Oswal Mutual Fund.

I/We hereby confirm that the EUIN box has been intentionally left blank by me/us as this is an "execution-only" transaction without any interaction or advice by the employee/relationship manager/sales person of the above distributor or notwithstanding the advice of in-appropriateness, if any, provided by the employee/relationship manager/sales person of the distributor and the distributor has not charged any advisory fees on this transaction.

First Holder

Second Holder

Third Holder

1 UNIT HOLDER INFORMATION

☐ Mr. ☐ Ms. ☐ M/s

Existing Folio Number

Existing UMRN

Name

F I R S T

M I D D L E

L A S T

2 SYSTEMATIC INVESTMENT PLAN DETAILS

Scheme name	Plan	Option	SIP Installment Amount
Motilal Oswal BSE 1000 Index Fund	<input type="checkbox"/> Regular <input type="checkbox"/> Direct	<input type="checkbox"/> Growth	(₹) _____

SIP Amount Min. ₹100/- (Daily), SIP Amount Min. ₹ 500/- (Weekly/Fortnightly/ Monthly), ₹ 1,500/- (Qtrly) & ₹ 6,000/- (Annual SIP) and in multiples of ₹1

SIP Frequency and Date*

☐ Daily SIP- Any date of the month except (29th, 30th and 31st)

☐ Fortnightly ☐ 1st-14 ☐ *7th-21st ☐ 14th-28th

☐ Annual SIP

Any Day/ ☐ Weekly - Any Day of Transfer _____ (Monday to Friday)

Date SIP ☐ Monthly SIP- Any date of the month except (29th, 30th and 31st)

☐ Quarterly SIP- Any date of the month for each quarter (i.e. January, April, July, October) except (29th, 30th and 31st)

*Incase if no date is selected, 7th would be the default SIP Date.

SIP Period (SIP tenure should not exceed 40 years)

From To

*First sip instalment will be debited on or after 18th July 2025.

SIP cheque No.

SIP cheque Date

3 DECLARATION AND SIGNATURE

(To be signed by ALL UNIT HOLDERS if mode of holding is 'joint')

This is to confirm that the declaration/instruction has been carefully read, understood. I/We have understood that I/we are authorized to cancel/amend this mandate by appropriately communicating the cancellation/amendment request to the User entity or the bank where I have authorized the debit and express my willingness and authorize to make payments through participation in NACH/ECS/Direct Debit/Standing Instructions. I/We hereby confirm adherence to the terms of NACH/ECS (Debits)/Direct Debits/Standing Instructions. Authorization to Bank: This is to inform that I/We have registered for ECS/ NACH (Debit Clearing) / Direct Debit / Standing instructions facility and that my/our payment towards my/our investment in Motilal Oswal Mutual Fund shall be made from my/our bank account with your Bank. I/We authorize the representatives Motilal Oswal Mutual Fund carrying this mandate form to get it verified and executed.

(Please attach a cancelled cheque/cheque copy)

First / Sole Applicant / Guardian / Authorised Signatory

Second Applicant

Third Applicant

(To be signed by all holders if mode of operation of Bank Account is 'Joint')



OTM Debit Mandate form NACH/ ECS/ Direct Debit (Applicable for Lumpsum Additional Purchases as well as SIP Registrations)

UMRN

For Official Use

Date

Tick (✓)

Create ☒

Modify ☒

Cancel ☒

Sponsor Bank Code

C I T I O O O P I G W

Utility Code

N A C H O O O O O O O O O 2 2 8 0 6

I/We hereby authorize

Motilal Oswal Mutual Fund

To Debit (to tick ✓)

☐ SB ☐ CA ☐ CC ☐ SB-NRE ☐ SB-NRO ☐ Other

Bank a/c number

with Bank

Bank name and branch

IFSC

Or MICR

an amount of Rupees

₹

FREQUENCY

☐ Mthly ☐ Qtrly ☐ H.Yrly ☐ Yrly ☒ As & when presented

DEBIT TYPE

☐ Fixed Amount ☒ Maximum Amount

Reference 1

Folio No.

Mob. No.

Reference 2

Application No.

Email ID

I agree for the debit of mandate processing charges by the bank whom I am authorizing to debit my account as per latest schedule of charges of the bank.

Period

From

To

Maximum period of validity of this mandate is 40 years only

1. Signature Primary account holder

2. Signature of account holder

3. Signature of account holder

1. Name in bank records

2. Name in bank records

3. Name in bank records

This is to confirm that the declaration has been carefully read, understood & made by me/us. I am authorizing the User entity/ Corporate to debit my account based on the instruction as agreed and signed by me. I have understood that I am authorized to cancel/ amend this mandate by appropriately communicating the cancellation/amendment request to the User entity/ corporate or the bank where I have authorized the debit

ACKNOWLEDGMENT SLIP

(To be filled by the investor)

Application No.

Folio No.

Investor Name

Scheme Name

Motilal Oswal BSE 1000 Index Fund

Plan

Option

SIP Period From

To

Stamp & Signature

SYSTEMATIC INVESTMENT PLAN DETAILS

- The Mandate will be registered under the best suited mode i.e. NACH or ECS or Direct Debit at the discretion of its appointed payment Aggregator through whom the mandate will be registered for the SIP debit facility.
- Unit holder(s) need to provide along with the mandate form an original cancelled cheque (or a copy) with name and account number pre-printed of the bank account to be registered for registration of the mandate failing which registration may not be accepted. The Unit holder(s) cheque/ bank account details are subject to third party verification.
- Where the cancelled cheque or a copy of the cheque does not mention the bank account holder's name(s), Investor should provide self-attested bank pass book copy / bank statement / bank letter to substantiate that the first unit holder is one of the joint holder of the bank account. In case of a mismatch, it will be deemed to be a 3rd party payment and rejected except under the following exceptional circumstances:
 - Payment by parents / grand-parents / related person on behalf of a minor in consideration of natural love and affection or as gift provided the purchase value is less than or equal to ' 50,000/- and KYC is completed for the registered Guardian and the person making the payment. However, single subscription value shall not exceed above ' 50,000/- (including investment through each regular purchase or single SIP installment). However, this restriction will not be applicable for payment made by a guardian whose name is registered in the records of Mutual Fund in that folio. Additional declaration in the prescribed format signed by the guardian and parents/grand - parents/ related person is also required along with the application form.
 - Payment by an Employer on behalf of employee under Systematic Investment plans through Payroll deductions provided KYC is completed for the employee who is the beneficiary investor and the employer who is making the payment. Additional declaration in the prescribed format signed by employee and employer is also required along with the application form
 - Custodian on behalf of an FI or a Client provided KYC is completed for the investor and custodian. Additional declaration in the prescribed format signed by Custodian and FI/ Client is also required along with the application form .
- Please not that in the event of a minor mismatch between the bank account number mentioned in the application form and as appearing in the cheque leaf submitted, bank account number would be updated based on the cancelled cheque leaf provided the name(s) of the investor/applciant appears in the cheque leaf.
- AUTHORISATION BY BANK ACCOUNT HOLDER(S)**
 - Please indicate the name of the bank & branch, bank account number.
 - If the mode of operation of bank account is joint, all bank account holders would need to sign at the place marked.
- Applications incomplete in any respect are liable to be rejected. AMC/ Service Provider shall have absolute discretion to reject any such Application forms.
- AMC or other service providers shall not be responsible and liable for any damages / compensation for any loss, damage etc. The investor assumes the entire risk of using this facility and takes full responsibility.
- DECLARATION & SIGNATURES**

This section need to be signed by the applicant(s) / unit holder(s) at the places marked as per the mode of holding recorded with us (i.e. "Single", "Anyone or Survivor" or "Joint").

TERMS AND CONDITIONS FOR ECS (Debit Clearing)

- The cities/banks/ branches in the list may be modified /updated / changed / removed at any time in future entirely at the discretion of Motilal Oswal Mutual Fund without assigning any reasons or prior notice. If any city / bank/ branch is removed, SIP instructions for investors in such city/bank/branch via (ECS) (Debit Clearing) Direct Debit route will be discontinued without prior notice.
- List of Banks for SIP Direct Debit Facility:-**

Allahabad Bank, Axis Bank, Bank of Baroda, Bank of India, Citi Bank, Corporation Bank, Federal Bank, ICICI Bank, IDBI Bank, IndusInd Bank, Kotak Mahindra Bank, Punjab National Bank, South Indian Bank, State Bank of India, State Bank of Patiala, UCO Bank, Union Bank of India, United Bank of India
- Applications for SIP Auto Debit (ECS/ Direct Debit) Facility would be accepted only if the bank branch participates in local MICR/ECS clearing.

INSTRUCTIONS TO FILL THE OTM Debit Mandate form NACH/ ECS/ Direct Debit

- UMRN Code, Sponsor Code, and Utility Code are for official use only. Please do not write anything in these boxes/spaces.
- The following information has to be mandatorily filled in the Mandates. In case any of these fields are not filled, the mandate is liable for rejection.
 - Please tick the Appropriate Account Type and furnish the Bank Account Number from which the SIP installment/s is/are to be debited.
 - Please mention the Bank Name, 11 Digit IFSC code, 9 Digit MICR Code of your Bank in the appropriate boxes provided for the purpose. The MICR Code is the number appearing next to the cheque number on the MICR band at the bottom of the cheque. In the absence of these information, Mandate registration is liable to be rejected.
- Please mention the maximum amount that can be debited using this mandate. The amount needs to be mentioned both in words as well as numbers.
 - Please mention your Mobile Number and Email Id on the mandate form.
 - Maximum duration for enrolment is 30 years. An investor has option to choose the end date of the SIP for maximum of 30 years from the start date.**SIGNATURES**

The mandate needs to be signed by all the account holders in line with the mode of holding recorded with the investor's bank. The Account holder's names have to be mentioned as per their mode of holding in Account.

TERMS AND CONDITIONS

Systematic Investment Plan (SIP)

Daily : Minimum ₹100 & in multiples of ₹1/- & minimum tenure shall be 1 month (30 Days)

Daily SIP Frequency would not be available in case of Daily IDCW Plans of the Schemes & even SIP Pause facility not available for Daily SIP Frequency.

Monthly, Weekly, Fortnightly : Minimum ₹500 & in multiples of ₹1/- & 12 installments

Incase SIP Amount ₹1000/- and above Minimum installments 6 Systematic Investment Plan (SIP)

Minimum installment amount - ₹500/- and in multiples of ₹500/- thereafter (weekly/fortnightly/monthly frequency) Minimum 12 installments.

Incase SIP Amount ₹1000/- and above Minimum installments 6

Quarterly : Minimum ₹1,500 & in multiples of ₹1/- & 4 installments

Investors can choose any date, as applicable, of his / her preference as Quarterly SIP Debit Date for the year. In case, the date fixed happens to be a holiday / non-business day, the same shall be affected on the next business day. In case if no date is selected, 7th would be the default SIP Date. No Post Dated cheques would be accepted for SIP. The default cycle date would be 7th of SIP & STP for Monthly/Quarterly frequency.

Annual SIP : Minimum ₹6,000 & in multiples of ₹1/- & 1 installments

Investors can choose any date, as applicable, of his / her preference as Annual SIP Debit Date for the year. In case the chosen date falls on a Non-Business Day, then the SIP will be processed on the immediate next Business Day. In case the SIP date is not specified or in case of ambiguity, the SIP transaction will be processed on 7th of the subsequent month in which application for SIP registration was received. In case the end date is not specified, SIP will continue till it receives termination notice from the investor

Micro Systematic Investment Plan (SIP)

SEBI vide its circular dated 24th July 2012, conveyed that the investments aggregating ₹50,000 in a rolling 12 month period or in a financial year i.e. April to March, in all the schemes of Mutual Funds are exempt from the PAN requirement.

Where the aggregate of the Lumpsum Investment (Fresh Purchase & Additional Purchase) and Micro SIP installments by an investor based on the rolling 12 month period/ in a financial year i.e. April to March does not exceed ₹50,000/-, it shall be exempt from the requirement of PAN, (hereafter referred to as "Micro Investments").

PAN requirement exemption will be available only to Micro Investments made by the individuals being Indian Citizens (Including NRIs, Joint Holders*, Minor acting through Guardian and Sole proprietary firms not having PAN). Person of Indian Origin, Hindu Undivided Family, (HUF), Qualified Foreign Investor (QFI) and other categories of investors will not be eligible for this exemption. However the eligible investors are required to submit PAN exempt KYC issued by SEBI registered KRA (KYC Registration Authority). In case of joint holders, first holder must possess a PAN.

(Application not complying with any of the above instruction/guidelines would be rejected.)

Any day / date SIP: SIP Frequency Choice of Day/Date*

- Daily SIP-Any date of the month except 29th, 30th and 31st
- Fortnightly SIP dates available – 1st – 14th, *7th – 21st, 14th – 28th
- Weekly SIP-Any day of transfer from Monday to Friday.
- Monthly SIP-Any date of the month except 29th, 30th and 31st
- Quarterly SIP-Any date of the month for each quarter (i.e. January-March, April-June, July-September, October-December) except 29th, 30th and 31st
- In case the SIP date is not specified or in case of ambiguity, the SIP transaction will be processed on 7th of the subsequent month in which application for SIP registration was received. In case the end date is not specified, SIP will continue till it receives termination notice. All other terms and conditions of SIP facility will remain unchanged.

SIP Booster** facility (SIP Booster)

- SIP Booster Physical facility offers frequency at i. quarterly, half-yearly and yearly intervals. In case the SIP Booster frequency is not specified, it will be considered as yearly frequency.
- The minimum SIP Booster amount would be Rs. 100/- and in multiples of Re. 1/- thereafter for all the schemes of the Fund that offer SIP facility
- In case the investor does not specify SIP Booster amount, Rs.100/- will be considered as the SIP Booster amount and the request will be processed accordingly.
- SIP Booster facility would be available to all Existing and new SIP enrollments. Existing investors who have enrolled for SIP with the maximum amount for debit are also eligible to avail SIP Booster facility and will be required to submit OTM Mandate' at least 20 calendar days before the SIP Booster start month. In case SIP Installment after SIP Booster exceeds the maximum amount for debit, then the request for SIP Booster will be processed up to the maximum amount for debit. Further, if the investor revises the maximum amount for debit, then such an increase in amount will be effective from the next SIP Booster cycle. However, the maximum amount registered for the debit mandate cannot be reduced.
- Existing investors registered for SIP through ECS / Direct Debit facility and intending to avail SIP Booster facility will be required to register for new OTM mandate and on activation of the OTM, the same would be applied on their active SIP to perform uninterrupted SIP debit instructions with SIP Booster details.
- Maximum Limit will allow investors to set a highest SIP amount. Once the SIP reaches this set maximum limit it would stop any further additions and the SIP would thereafter continue with the last boosted amount, until the investor upgrades the limit.

An Illustration: The SIP Booster facility will work as follows:

Details of SIP registered	SIP Booster facility
<ul style="list-style-type: none">Fixed SIP Instalment amount: ₹ 5,000/-SIP Period: April 1, 2019 till March 31, 2022 (3 years)SIP date: 1st of every month (36 Instalments)	<p>By providing / choosing the following additional details, an investor can avail SIP Booster facility.</p> <p>Example:</p> <ul style="list-style-type: none">SIP Booster Amount: ₹ 1,000/-SIP Booster Frequency: Every 6 monthsMax SIP limit :10,000

ASBA APPLICATION FORM

New Fund Offer / On Going Application Form

Motilal Oswal BSE 1000 Index Fund

(An open-ended fund replicating/tracking the BSE 1000 Total Return Index)
New Fund Offer Price: ₹ 10/- Per Unit

NFO Opens on: June 5, 2025 NFO Closes on: June 19, 2025 Please read the Scheme Information Document / Key Information Memorandum of the Scheme and instructions carefully.

Application No.

Form-4

DISTRIBUTOR INFORMATION

FOR OFFICE USE ONLY

Application No.

Distributor ARN / RIA#	Sub Broker Code	Employee Code (E-UIN)
ARN/RIA	ARN	

SCSB	SCSB IFSC	Syndicate Member Code
Name & Code	11 digit Code	Name & Code

☐ Please tick if the EUIN space is left blank: I/we hereby confirm that the EUIN box has been intentionally left blank by me/us as this is an "execution-only" transaction without any interaction or advice by the employee/relationship manager/sales person of the above distributor of notwithstanding the advice of in-appropriateness, if any, provided by the employee/relationship manager/ sales person of the distributor and the distributor has not charged any advisor fees on this transaction.

TRANSACTION CHARGES FOR APPLICATIONS THROUGH DISTRIBUTORS ONLY (Please ✓ any one of the below)

(Refer Instruction No. 11)

☐ I confirm that I am a First time investor across Mutual Funds.
(150 deductible as Transaction Charge and payable to the Distributor)

OR

☐ I confirm that I am an existing investor in Mutual Funds.
(100 deductible as Transaction Charge and payable to the Distributor)

In case the purchase/ subscription amount is ₹ 10,000 or more and your Distributor has opted in to receive Transaction Charges, the same are deductible as applicable from the purchase/ subscription amount and payable to the Distributor. Units will be issued against the balance amount invested.

APPLICANTS INFORMATION (Name should be as available in Demat Account in case of Demat Account holders)

Name of Sole/ 1st Applicant

F I R S T M I D D L E L A S T

Name of 2nd Applicant

F I R S T M I D D L E L A S T

Name of 3rd Applicant

F I R S T M I D D L E L A S T

Name of Guardian/ contact Person

F I R S T M I D D L E L A S T

Category (Please ✓) ☐ Retail Individual Investor(s) ☐ Non Institutional Investor(s)

PAN /PEKRN** 2nd applicant 3rd applicant

Mode of Operation in Demat Account ☐ Single OR ☐ Anyone of Survivor OR ☐ Joint

** Please mention PAN/PEKRN(PAN Exempted KYC Reference Number) as it is mandatory

DEPOSITORY ACCOUNT DETAILS

Depository Name (Please ✓) ☐ National Securities Depository Ltd. ☐ Central Depository Services (India) Limited

Depository Participant Name DP-ID

Beneficiary Account Number

INVESTMENT DETAILS (Please ✓ where applicable)

Scheme Name: Motilal Oswal BSE 1000 Index Fund Plan

Option ☐ Growth

DETAILS OF BANK ACCOUNT FOR BLOCKING OF FUND

Bank Account Number Bank Name

Branch Name where account in held

Total Amount to be blocked *(₹ in figure) ₹ (in words)

* Minimum ₹500/- and multiples of ₹ 1/- thereafter

Att.: NRI Investors : Payment should be made through their NRE/FCNR accounts.

UNDERTAKING BY ASBA INVESTOR

1) I/we hereby undertake 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 Regulations') 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 all necessary acts including blocking of application money toward 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 specific in this application form, transfer of funds to the Bank Account of the Scheme/ Motilal Oswal Asset management Co. Ltd.(MOAMC), on receipt of instructions from the Registrar and Transfer Agent after the allotment of the Units entitling me/us to receive Units on such transfer of funds, etc. (b) Registrar and Transfer Agent to issue instructions to the SCSB to remove the block on the funds in the Bank Account specific in the application, upon allotment of Units and to transfer the requisite money to the Scheme's account / Bank Account of MOAMC. 3) In case the amount available in the bank account specific in the application is insufficient for amount equivalent to the application money toward the Subscription of Units, the SCB 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 record, the application shall be rejected and the MOAMC/ Motilal Oswal Mutual Fund or SCSBs shall not be liable for losses, 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 9if it has been provided), Amount applied for and the account number for where NFO amount was locked.

Signature of the Applicant(s)

Date

Sole /1st Applicant 2nd Applicant 3rd Applicant

Signature of Bank Holder(s) (to be signed as per holding pattern in the Bank Account)

Sole /1st Account Holder as In Bank Records 2nd Account Holder as In Bank Records 3rd Account Holder as In Bank Records

ACKNOWLEDGMENT SLIP (To be filled in by the investor)

Scheme Name : Motilal Oswal BSE 1000 Index Fund

Plan Option ☐ Growth

Received from Mr./Ms./Mrs./ M/s

Address

SCSB Account details :

A/c No.: Bank Name Branch Name

Total Amount to be Blocked: ₹ (in figures) ₹ (in words)

Application No.

Date

Acknowledgement Stamp & Date

INSTRUCTIONS FOR COMPLETING THE APPLICATION FORM

1 General Information

- Please read the terms of the Key Information Memorandum (KIM) and the Scheme Information Document (SID) and Statement of Additional Information carefully before filling the Application Form. Investors are deemed to have accepted the terms subject to which this offer is being made and bind themselves to the terms upon signing the Application Form and tendering payment.
- The Application Form should be completed in ENGLISH and in BLOCK LETTERS only. Please tick in the appropriate box for relevant options wherever applicable. Please do not overwrite. For any correction / changes (if any) made on the Application Form, the sole/all applicants are requested to authenticate the same by canceling and re-writing the correct details and counter-signing the same. Applications completed in all respects, must be submitted at the Investor Service Centres (ISCs) / Official Points of Acceptance.

c. Investments through distributors

As per directions of Securities and Exchange Board of India (SEBI), the distributors, agents or any persons employed or engaged or to be employed or engaged in the sale and/or distribution of mutual fund products are required to have a valid certification from the National Institute of Securities Markets (NISM) by passing the certification examination. Further, no agents / distributors are entitled to sell units of mutual funds unless the intermediary is registered with Association of Mutual Funds in India (AMFI).

- Applications on behalf of minors should be made by natural guardian (i.e. father or mother) or legal guardian (court appointed) and signed by them. The name of the Guardian should be filled in the relevant space provided in the Application Form. No joint applicant / joint holder is permitted with the minor beneficiary

e. Employee Unique Identification Number (EUIDN)

Further, SEBI has made it compulsory for every employee/ relationship manager/ sales person of the distributor of mutual fund products to quote in the Application Form the EUIDN obtained by him/her from AMFI. EUIDN would assist in addressing any instance of mis-selling even if the employee/ relationship manager/sales person later leaves the employment of the distributor. Hence, if your investments are routed through a distributor please ensure that the EUIDN is correctly filled in the Application Form. However, if your distributor has not given you any advice pertaining to the investment, the EUIDN box may be left blank. In this case, you are required to provide a duly signed declaration to this effect, as given in the Form.

f. Direct Investments

Investors applying under Direct Plan must mention "Direct" in ARN No. column. In case Distributor code is mentioned in the Application Form, but "Direct Plan" is indicated against the Scheme/ Series name, the Distributor code will be ignored and the application will be processed under Direct Plan. In case of valid application received without indicating "Direct Plan" against the Scheme/ Series name and without any Distributor Code mentioned on the form, the application will be processed under "Direct Plan".

- All Applicants are subject to detailed scrutiny and verification. Application Form incomplete in any respect or not accompanied by a Cheque / Demand Draft are liable to be rejected either at the collection centre itself or subsequently after detailed verification at the back office of the Registrars.
- If the Scheme name on the application form and on the payment instrument are different, the application will be processed and units will be allotted at applicable NAV of the scheme mentioned in the application / transaction slip duly signed by investor(s).

i. E-mail Communication

If the investor has provided an email address, the same will be registered in our records for communication and will be treated as your consent to receive, Allotment confirmations, consolidated account statement/account statement, annual report/abridged summary and any statutory / other information as permitted via electronic mode / email. These documents shall be sent physically in case the Unit holder opts/request for the same. Should the Unit holder experience any difficulty in accessing the electronically delivered documents, the Unit holder shall promptly intimate the Fund about the same to enable the Fund to make the delivery through alternate means. It is deemed that the Unit holder is aware of all security risks including possible third party interception of the documents and contents of the documents becoming known to third parties. The AMC / Trustee reserve the right to send any communication in physical mode.

2 Compliance and Prevention of Anti Money Laundering

Your attention is particularly drawn to the section on "Prevention of Money Laundering and Know Your Customer". All the applications with incomplete/incorrect information/not accompanied with the necessary documents, shall be treated as invalid and shall be liable to be rejected. Prevention of Money Laundering Act, the SEBI Circulars on Anti Money Laundering (AML) and the Client Identification implementation procedures prescribed by AMFI inter alia require the AMC to verify the records of identity and address(es) of investors. It is mandatory for all applicants to submit necessary documents for compliance with Anti Money Laundering (guardian in case of minor). The AMC reserves the right to reject subscription requests in the absence of appropriate compliance with the AML Laws.

3 Applicant's Personal Information

- Please furnish your name and complete postal address with the Pin Code (P.O. Box No. **Not enough**) and your Contact Nos. This would help us reach you faster.
- Please furnish the name of Contact Person in case of investments by Company/ Body Corporate / Trust / Society / Fils / Association of Person/ Body of Individuals.
- KYC Compliance:** KYC is mandatory for all investors (including joint holders, guardians of minors and NRIs) to enclose a copy of KYC compliance to the application for investing in mutual fund schemes.
- If you have not indicated your Tax Status in the Application Form, the same would be assumed to be others.

4 Bank Account Details

An investor at the time of purchase of units must provide the details of his / her pay-out bank account (i.e. account into which redemption/ proceeds are to be paid). Bank account details provided in the application will be used for refunding rejected applications where DP ID is not matching. Investors are requested to provide Bank Account Detail linked with their Demat Account. In case of discrepancies Bank Account Details as per depository records will prevail.

5 Payment Details

- Cheques should be crossed "**A/c Payee only**" and drawn in favour of **Motilal Oswal BSE 1000 Index Fund**
- Application Form along with the Cheque/Demand Draft may be lodged with Official Collection Centres.
- If you are residing / located in a city / town where we do not have an Official Collection Centre, please draw a demand draft payable at your nearest city where we have such office.
- Payment by Cash, Stock invests, Outstation Cheques and Non-MICR Cheques will not be accepted. Post-dated cheques will not be accepted.

6 Third Party Payments

Investment/subscription made through Third Party Cheque(s) will not be accepted. Third party cheque(s) for this purpose are defined as:

- Investment made through instruments issued from an account other than that of the beneficiary investor,
- in case the investment is made from a joint bank account, the first holder of the mutual fund folio is not one of the joint holders of the bank account from which payment is made. Third party cheque(s) for investment/subscription shall be accepted, only in exceptional circumstances, as detailed below:

- Payment by Employer on behalf of employee under Systematic Investment Plans or lump sum/one-time subscription through Payroll deductions.
- Custodian on behalf of a Foreign Institutional Investor (FII) or a client.

The above mentioned exception cases will be processed after carrying out necessary checks and verification of documents attached along with the purchase transaction slip/application form, as stated below:

- Determining the identity of the Investor and the person making payment i.e. mandatory Know Your Client (KYC) for Investor and the person making the payment.
- Obtaining necessary declaration from the Investor/unitholder and the person making the payment. Declaration by the person making the payment should give details of the bank account from which the payment is made and the relationship with the beneficiary.
- Verifying the source of funds to ensure that funds have come from the drawer's account only.

- If the investment/subscription is settled with pre-funded instruments such as Pay Order, Demand Draft, Banker's cheque, etc., a Certificate from the Issuing banker must accompany the purchase application, stating the Account holder's name and the Account number which has been debited for issue of the instrument. The funds should be debited from a pre-registered pay in account available in the records of the Mutual fund, or from the account of the first named unit holder. Additionally, if a pre-funded instrument issued by the Bank against cash, it shall not be accepted for investments of ₹ 50,000/- or more. Such pre-funded instrument issued against cash payment of less than ₹ 50,000/- should be accompanied by a certificate from the banker giving name, address and PAN (if available) of the person who has requested for the demand draft.
- If payment is made by RTGS, NEFT, bank transfer, etc., a copy of the instruction to the bank stating the account number debited must accompany the purchase application. The account number mentioned on the transfer instruction should be from pay in account available in the records, or from the account of the first named unit holder.

Investors are requested to note that AMC reserves right to have additional checks of verification for any mode of payment received. AMC reserves the right to reject the transaction in case the payment is received in an account not belonging to the first unit holder of the mutual fund.

In case of investors with multiple accounts, in order to ensure smooth processing of investor transactions, it is advisable to register all such accounts, as the investments/subscriptions received from the said multiple accounts shall be treated as 1st party payments. Refer Third Party Payment Declaration form available on our website www.motilaloswalmf.com or in Motilal Oswal Mutual Fund

branch offices.

7 Name and Type of Scheme

Name	Type
Motilal Oswal BSE 1000 Index Fund	(An open-ended fund replicating/tracking the BSE 1000 Total Return Index)

8 Demat Account

Investors have an option to hold the Units in dematerialized form. Investors desiring to get allotment of units in demat mode must have a beneficiary account with a Depository Participant (DP) of the Depositories i.e. National Securities Depositories Limited (NSDL) / Central Depository Services Limited (CDSL).

If PAN is not mentioned by applicants, the application is liable to be rejected. Investors may attach a copy of the Client Master Form / DP statement showing active demat account details for verification.

Names, mode of holding, PAN details, etc. of the Investor will be verified against the Depository data. The units will be credited to the beneficiary (demat) account only after successful verification with the depository records and realization of payment. In case the demat details mentioned in the application are incomplete/incorrect or do not match with the depository data, the application shall be treated as invalid for processing under demat mode and therefore may be considered for processing in non-demat form i.e. in physical mode if the application is otherwise valid.

All details such as address, bank details, nomination etc. will be applicable as available in the depositories' records. For effecting any subsequent changes to such information, Investors should approach their DP. Redemption requests for units held in demat mode must be submitted to DP or through Stock Exchange Platform, as applicable.

Holding / transacting of units held in demat mode shall be in accordance with the procedures / requirements laid down by the Depositories, viz. NSDL/ CDSL in accordance with the provisions under the Depositories Act, 1996 and the regulations thereunder.

9 NRIs

- In case of NRI / Persons of Indian Origin, payment must be made either by cheque or demand draft by means of: (a) inward remittance through normal banking channels; or (b) out of funds held in the NRE / FCNR account, in the case of purchases on a repatriation basis or out of funds held in the NRE / FCNR / NRO account, in the case of purchases on a non-repatriation basis. (In case of Indian Rupee drafts purchased from abroad or payments from FCNR/NRE accounts, a certificate from the Bank issuing the draft confirming the debit and / or foreign inward remittance certificate (FIRC) issued by investor's banker should also be enclosed. The Mutual Fund reserves the right to hold redemption proceeds in case the requisite details are not submitted).

10 Nomination Details

Applicants applying for units singly / jointly can make a nomination at the time of initial investment or during subsequent investments / during the tenure of the investment.

Nomination can be made for maximum number of three nominees. In case of multiple nominees, the percentage of allocation/share in favour of each of the nominees should be indicated against their name and such allocation/share should be in whole numbers without any decimals making a total of 100 percent.

In case of units held in demat mode, the nomination details provided to the Depository Participant shall be applicable. Request for Nomination/ Cancellation of nomination have to be mandatorily signed by all the holders irrespective of the Holding, POA holder cannot request/ cancel nominations.

11 Declaration and Signatures

- Signature can be in English or in any other Indian Language. Thumb impressions must be attested by a Magistrate or Notary Public or a Special Executive Magistrate under his/her official seal.
- Applications by minors must be signed on their behalf by their guardians.
- If you are investing through your constituted attorney, please ensure that the PoA document is signed by you and your constituted Attorney. The signature in the Application Form, then needs to clearly indicate that the signature is on your behalf by the Constituted Attorney.

12 Transaction Charges

In terms of SEBI circular, CIR/IMD/DF/13/2011 dated August 22, 2011, the distributors of mutual fund products are allowed to be paid transaction charges for purchase transactions:

- @ ₹ 100/- per subscription of ₹ 10,000/- and above in respect of existing unitholders; and
- @ ₹ 150/- for subscription of ₹ 10,000/- and above in respect of a first time investor in mutual funds.

The transaction charge shall be deducted from the subscription amount and paid to the distributor; and the balance shall be invested in the Scheme. The transaction charges and the net investment amount and the number of units allotted will be clearly mentioned in the Account Statement issued by the Mutual Fund.

TRANSACTION CHARGES IN CASE OF INVESTMENTS THROUGH SIP:

Transaction Charges in case of investments through SIP are deductible only if the total commitment of investment (i.e. amount per SIP installment x No. of installments) amounts to ₹ 10,000 or more. In such cases, Transaction Charges shall be deducted in 3-4 installments.

Transaction Charges shall not be deducted:

- where the Distributor of the investor has not opted to receive any Transaction Charges
- for purchases / subscriptions / total commitment amount in case of SIP of an amount less than ₹ 10,000/-;
- for transactions other than purchases / subscriptions relating to new inflows i.e. through Switches / Systematic Transfers / IDCW Transfers/ IDCW Reinvestment, etc.;
- for purchases / subscriptions made directly with the Fund (i.e. not through any Distributor); and
- for purchases / subscriptions routed through Stock Exchange(s).

13 Systematic Investment Plan (SIP)

Monthly, Weekly, Fortnightly : Minimum ₹ 500 & in multiples of ₹ 1/- & 12 installments Systematic Investment Plan (SIP)

Quarterly : Minimum ₹ 1,500 & in multiples of ₹ 1/- & 4 installments | Annual SIP : Minimum ₹ 6,000 & in multiples of ₹ 1/- & 1 installments

Investors can choose any date, as applicable, of his / her preference as Quarterly SIP Debit Date for the year. In case, the date fixed happens to be a holiday / non-business day, the same shall be affected on the next business day. In case if no date is selected, 7th would be the default SIP Date. No Post Dated cheques would be accepted for SIP. The default cycle date of SIP & STP Monthly/Quarterly will be 7th.

SEBI vide its circular dated 24th July 2012, conveyed that the investments aggregating ₹ 50,000 in a rolling 12 month period or in a financial year i.e. April to March, in all the schemes of Mutual Funds are exempt from the PAN requirement.

Where the aggregate of the Lumpsum Investment (Fresh Purchase & Additional Purchase) and Micro SIP installments by an investor based on the rolling 12 month period / in a financial year i.e. April to March does not exceed ₹ 50,000/-, it shall be exempt from the requirement of PAN, (hereafter referred to as "Micro Investments").

PAN requirement exemption will be available only to Micro Investments made by the individuals being Indian Citizens (including NRIs, Joint Holders), Minor acting through Guardian and Sole proprietary firms not having PAN). Person of Indian Origin, Hindu Undivided Family, (HUF), Qualified Foreign Investor (QFI) and other categories of investors will not be eligible for this exemption. However the eligible investors are required to submit PAN exempt KYC issued by SEBI registered KRA (KYC Registration Authority). In case of joint holders, first holder must possess a PAN.

(Application not complying with any of the above instruction/guidelines would be rejected.)

Any day / date SIP: SIP Frequency Choice of Day/Date

- Fortnightly SIP dates available – 1st – 14th, 7th – 21st, 14th – 28th

- Weekly SIP – Any day of transfer from Monday to Friday.

- Monthly SIP – Any date of the month except 29th, 30th and 31st

- Quarterly SIP – Any date of the month for each quarter (i.e. January-March, April-June, July-September, October-December) except 29th, 30th and 31st

e. the SIP will be processed on the immediate next Business Day. In case the SIP date is not specified or in case of ambiguity, the SIP transaction will be processed on 7th of the subsequent month in which application for SIP registration was received. In case the end date is not specified, SIP will continue till it receives termination notice. All other terms and conditions of SIP facility will remain unchanged.

14 PAN Details

It is mandatory for all investors to quote their Permanent Account Number (PAN) submit certified copy of the PAN card issued by the Income Tax Department irrespective of the amount of investment, while making an application for Purchase of Units. In case of joint holding, PAN details of all holders should be submitted. In case the application is on behalf of minor, PAN details of the Guardian must be submitted. Investors residing in the state of Sikkim are exempt from the mandatory requirement of PAN proof submission; however sufficient documentary evidence shall have to be submitted for verifying that they are residents of the State of Sikkim. Applications without the aforesaid details are liable to be rejected without any reference to the investors. Investment through Systematic Investment Plans (SIPs) upto 50,000/- (aggregate of installments in a rolling 12 months period or in a financial year i.e. April - March) per year per investor shall be exempt from the requirement of PAN.

15 KYC REQUIREMENTS AND DETAILS

- Basic KYC: Applicants are required to provide basic KYC details like photograph, proof of identity, proof of address, a KYC form and other details as per KYC form, to update their KYC with the fund and update on SEBI designated KYC Registration Authority (KRA) systems. If applicants' have already complied with basic KYC through some other intermediary, they may just provide a KYC acknowledgement of valid KYC status available through the KRA. Basic KYC is applicable for all applicants, Guardian and Power of Attorney Holders as well.

- Additional Details: Additional details like status, occupation details, gross annual income, net worth and other details as mentioned in the relevant sections of the application form are mandatory for all applicants as applicable, including joint holders. Details of net worth are mandatory for Non Individual applicants and optional for Individual applicants in lieu of gross annual income. While providing details of net worth, the same should be of a date which is within one year of the application.

- Non Individual applicants, not being a company that is listed on any recognized stock exchange or is a subsidiary of such listed company or is controlled by such listed Company, are also required to submit a declaration of ultimate