AngelOne®

ACCOUNT OPENING FORM

FOR NRI

FOR CSO USE ONLY

EQUITY

Form No.	1234567890
Client Code	
DP ID	
Branch Code	
AP Code	
Ver: 4.1	November 2025

Application Type	☐ New ☐ Update
KYC Number	

Connect with us

INDEX OF DOCUMENTS

IMPORTANT NOTE

1. Signature Types:

FH Signature of Account Holder

Signature of Introducer

G Signature of Guardian

FW Signature of First Witness

SW Signature of Second Witness

2. In case of any correction in the form - Sign next to the correction done & Sign has to match the original signature

IMPORTANT INSTRUCTIONS

A) Fields marked with* are mandatory fields
B) Tick "✓" wherever applicable.
C) Please fill the form in English and in BLOCK letters.
D) Please fill the date in DD-MM-YYYY format.
E) For particular section update, Please tick (✓) in the box section number and strike off the sections not required to be updated
F) Please read section wise detailed guidelines / instruction at the end.
G) List of State / U.T code as per Indian Motor Vehicle Act, 1988 is available at the end.
H) List of two character ISO 3166 country codes is available at the end.
I) KYC number of applicant is mandatory for update application.
J) The 'OTP based E-KYC' check box is to be checked for accounts opened using OTP based E-KYC in non-face to face mode

KYC CHECKLIST (PLEASE TICK WHEREVER APPROPRIATE)

a) Passport copy (page with photograph, address page and page showing recent arrival stamp of India*)

b) Visa copy / OCI or PIO card copy is required if place of birth is other than India.

c) Pan card copy

d) Foreign address proof (Any one of the following)

i. Passport / Driving License / Registered Lease or Sale Agreement of Residence / Flat Maintenance bill/ Insurance Copy.

ii. Utility bill (Electricity bill / gas bill / water bill) (Not more than 2 months old)

iii. Original bank statement & Bank verification letter (on letterhead of bank)

e) Indian address proof (Any one of the following)

i. Passport / Driving License / UID (Aadhaar) / Voter's ID / Registered Lease or Sale Agreement of Residence / Flat Maintenance bill/ Insurance Copy.

ii. Utility bill (Electricity bill / gas bill / water bill) (Not more than 2 months old)

iii. Original bank statement & Bank verification letter (on letterhead of bank)

f) PIS Permission copy - PIS is portfolio Investment scheme of RBI under which NRIs are allowed to trade in Indian secondary market. It can be obtained from Authorised bankers (Ads).
NRO PIS Account - Bank Investment Letter is required to trade in Indian Secondary market. It can be obtained from Authorised bankers (Ads).

Note: All the above mentioned documents need to be self attested. *In absence of in-person verification, all the above mentioned documents need to be attested either by Indian embassy or consulate general of the country where NRI resides / overseas notary / Overseas Banker / Court, Magistrate, Judge+ self attested.

g) Cancelled cheque leaf of NRE / NRO savings bank account.

Additional Documents:

In case of F&O, client will have to submit any one of the below Income proof:

- Copy of ITR Acknowledgment (for last financial year)
- Copy of Annual Accounts (for last financial year)
- Copy of Form 16 in case of salary income (for last financial year)
- Net worth certificate (latest one, or at the end of last financial year)
- Salary Slip
- Bank account statement or Bank passbook (for last 6 months)
- Any other relevant documents substantiating ownership of assets
- Self-declaration along with relevant supporting. (The income as per declaration should be commensurate with the supporting document provided)

Note: F&O is possible only through NRO (Non repatriable) Account.

CENTRAL KYC REGISTRY | Instructions / Check list / Guidelines for filling Individual KYC Application Form

A Clarification/Guidelines on filling 'Personal Details' section

1 Name: The name should match the name as mentioned in the Proof of Identity submitted failing which the application is liable to be rejected.

2 One the following is mandatory: Mother's name, Spouse's name, Father's name.

B Clarification / Guidelines on filling 'Current Address details' section

1 In case of deemed PoA such as utility bill, etc. or self declaration, the document need not be uploaded on CKYCR

2 PoA to be submitted only if the submitted PoI does not have current address or address as per PoI is invalid or not in force.

3 State/U.T Code and Pin / Post Code will not be mandatory for Overseas addresses.

4 In Section 2, one of I, II, and III is to be selected. In case of online E-KYC authentication, II is to be selected.

5 In Section 3, one of I, II, III and IV is to be selected. In case of online E-KYC authentication, II is to be selected.

6 List of documents for 'Deemed Proof of Address":

Document Code	Description
1	Utility bill which is not more than two months old of any service provider(electricity, telephone, post-paid mobile phone, piped gas, water bill).
2	Property or Municipal tax receipt.
3	Pension or family pension payment orders(PPOs)issued to retired employees by Government Departments or Public Sector Undertakings, if they contain the address.
4	Letter of allotment of accommodation from employer issued by State Government or Central Government Departments, statutory or regulatory bodies, public sector undertakings, scheduled commercial banks, financial institutions and listed companies and leave and licence agreements with such employers allotting official accommodation.

7 Regulated Entity(RE)shall redact(first 8 digits)of the Aadhaar number from Aadhaar related data and documents such as proof of possession of Aadhaar, while uploading on CKYCR.

8 "Equivalent e-document" means an electronic equivalent of a document, issued by the issuing authority of such document with its valid digital signature including documents issued to the digital locker account of the client as per rule 9 of the Information Technology (Preservation and Retention of Information by Intermediaries Providing Digital Locker Facilities)Rules, 2016.

9 'Digital KYC process' has to be carried out as stipulated in the PML Rules, 2005.

10 RES may use the Self Declaration check box where Aadhaar authentication has been carried out successfully for a client and client wants to provide a current address, different from the address as per the identity information available in the Central Identities Data Repository

C Clarification / Guidelines on filling 'Contact details' section

1 Please mention two-digit country code and 10 digit mobile number(e.g. for Indian mobile number mention 91-9999999999).

2 Do not add '0' in the beginning of Mobile number.

D Clarification / Guidelines on filling 'Related Person details' section

1 Provide KYC number of related person, if available.

E Clarification on Minor

1 Guardian details are optional for minors above 10 years of age for opening of bank account only

2 However, in case guardian details are available for minor above 10 years of age, the same(or CKYCR number of guardian)is to be uploaded.

List of two– digit state / U.T codes as per Indian MotorVehicle Act, 1988

State / U·T	Code	State / U·T	Code	State / U·T	Code
Andaman & Nicobar	AN	Himachal Pradesh	HP	Pondicherry	PY
Andhra Pradesh	AP	Jammu & Kashmir	JK	Punjab	PB
Arunachal Pradesh	AR	Jharkhand	JH	Rajasthan	RJ
Assam	AS	Karnataka	KA	Sikkim	SK
Bihar	BR	Kerala	KL	Tamil Nadu	TN
Chandigarh	CH	Lakshadweep	LD	Telangana	TS
Chattisgarh	CG	Madhya Pradesh	MP	Tripura	TR
Dadra and Nagar Haveli	DN	Maharashtra	MH	Uttar Pradesh	UP
Daman & Diu	DD	Manipur	MN	Uttarakhand	UA
Delhi	DL	Meghalaya	ML	West Bengal	WB
Goa	GA	Mizoram	MZ	Other	XX
Gujarat	GJ	Nagaland	NL		
Haryana	HR	Orissa	OR		

List of ISO3166 two - digit Country Code

Country	Country Code	Country	Country Code	Country	Country Code	Country	Country Code
Afghanistan	AF	Dominican Republic	DO	Libya	LY		PM
Aland Islands	AX	Ecuador	EC	Liechtenstein	LI	Saint Vincent and the Grenadines	VC
Albania	AL	Egypt	EG	Lithuania	LT		WS
Algeria	DZ	El Salvador	SV	Luxembourg	LU	San Marino	SM
American Samoa	AS	Equatorial Guinea	GQ	Macao	MO		ST
Andorra	AD	Eritrea	ER	Macedonia, the former Yugoslav Republic of	MK	Saudi Arabia	SA
Angola	AO	Estonia	EE	Madagascar	MG		SN
Anguilla	AI	Ethiopia	ET	Malawi	MW	Serbia	RS
Antarctica	AQ	Falkland Islands (Malvinas)	FK	Malaysia	MY		SC
Antigua and Barbuda	AG	Faroe Islands	FO	Maldives	MV	Sierra Leone	SL
Argentina	AR	Fiji	FJ	Mali	ML		SG
Armenia	AM	Finland	FI	Malta	MT	Sint Maarten (Dutch part)	SX
Aruba	AW	France	FR	Marshall Islands	MH		SK
Australia	AU	French Guiana	GF	Martinique	MQ	Slovenia	SI
Austria	AT	French Polynesia	PF	Mauritania	MR		SB
Azerbaijan	AZ	French Southern Territories	TF	Mauritius	MU	Somalia	SO
Bahamas	BS	Gabon	GA	Mayotte	YT		ZA
Bahrain	BH	Gambia	GM	Mexico	MX	South Georgia and the South Sandwich Islands	GS
Bangladesh	BD	Georgia	GE	Micronesia, Federated States of	FM		SS
Barbados	BB	Germany	DE	Moldova, Republic of	MD	Spain	ES
Belarus	BY	Ghana	GH	Monaco	MC		LK
Belgium	BE	Gibraltar	GI	Mongolia	MN	Sudan	SD
Belize	BZ	Greece	GR	Montenegro	ME		SR
Benin	BJ	Greenland	GL	Montserrat	MS	Svalbard and Jan Mayen	SJ
Bermuda	BM	Grenada	GD	Morocco	MA		SZ
Bhutan	BT	Guadeloupe	GP	Mozambique	MZ	Sweden	SE
Bolivia, Plurinational State of	BO	Guam	GU	Myanmar	MM		CH
Bonaire, Sint Eustatius and Saba	BQ	Guatemala	GT	Namibia	NA	Syrian Arab Republic	SY
Bosnia and Herzegovina	BA	Guernsey	GG	Nauru	NR		TW
Botswana	BW	Guinea	GN	Nepal	NP	Tajikistan	TJ
Bouvet Island	BV	Guinea-Bissau		Netherlands	NL		
Brazil	BR	Guyana	GY	New Caledonia	NC	Thailand	TH
British Indian Ocean Territory	IO	Haiti		New Zealand	NZ		
Brunei Darussalam	BN	Heard Island and McDonald Islands	HM	Nicaragua	NI	Togo	TG
Bulgaria	BG	Holy See (Vatican City State)		Niger	NE		
Burkina Faso	BF	Honduras	HN	Nigeria	NG	Tonga	TO
Burundi	BI	Hong Kong		Niue	NU		
Cabo Verde	CV	Hungary	HU	Norfolk Island	NF	Tunisia	TN
Cambodia	KH	Iceland		Northern Mariana Islands	MP		
Cameroon	CM	India	IN	Norway	NO	Turkmenistan	TM
Canada	CA	Indonesia		Oman	OM		
Cayman Islands	KY	Iran, IslamicRepublic of	IR	Pakistan	PK	Tuvalu	TV
Central African Republic	CF	Iraq		Palau	PW		
Chad	TD	Ireland	IE	Palestine, State of	PS	Ukraine	UA
Chile	CL	Isle of Man		Panama	PA		
China	CN	Israel	IL	Papua New Guinea	PG	United Kingdom	GB
Christmas Island	CX	Italy		Paraguay	PY		
Cocos (Keeling) Islands	CC	Jamaica	JM	Peru	PE	United States Minor Outlying Islands	UM
Colombia	CO	Japan		Philippines	PH		
Comoros	KM	Jersey	JE	Pitcairn	PN	Uzbekistan	UZ
Congo	CG	Jordan		Poland	PL		
Congo, the Democratic Republic of the	CD	Kazakhstan	KZ	Portugal	PT	Venezuela, Bolivarian Republic of	VE
Cook Islands	CK	Kenya		Puerto Rico	PR		
Costa Rica	CR	Kiribati	KI	Qatar	QA	Virgin Islands, British	VG
Cote d'Ivoire !Côte d'Ivoire	CI	Korea, Democratic People's Republic of		Reunion !Réunion	RE		
Croatia	HR	Korea, Republic of	KR	Romania	RO	Wallis and Futuna	WF
Cuba	CU	Kuwait		Russian Federation	RU		
Curacao !Curaçao	CW	Kyrgyzstan	KG	Rwanda	RW	Yemen	YE
Cyprus	CY	Lao People's Democratic Republic		Saint Barthelemy !Saint Barthélemy	BL		
Czech Republic	CZ	Latvia	LV	Saint Helena, Ascension and Tristan da Cunha	SH	Zimbabwe	ZW
Denmark	DK	Lebanon		Saint Kitts and Nevis	KN		
Djibouti	DJ	Lesotho	LS	Saint Lucia	LC		
Dominica	DM	Liberia		Saint Martin (French part)	MF		

Know Your Client (KYC) Application Form (For NRI and FNC Only)

Please fill the form in ENGLISH and in BLOCK letters
Fields marked * are mandatory
Fields marked ' are pertaining to CKYC and mandatory only if processing CKYC also

AngelOne CDSL VENTURES LIMITED ....Exploring New Horizons

Application Number:

FIRST HOLDER

Application Type*: O New KYC O Modification KYC

KYC Mode*: Please Tick (✓)
☐ Normal ☐ EKYC OTP ☐ EKYC Biometric ☐ Online KYC ☐ Offine EKYC ☐ Digilocker

1. PERSONAL DETAILS (Please refer instruction A at the end)

☐ Name* (Same as ID proof) Prefix ____ ____________
(If any*) Maiden Name ____ ____________
Father / Spouse Name ____ ____________
Mother Name ____ ____________
Date of Birth* ____________
PAN* ____________

PHOTO

Gender* ☐ M- Male ☐ F- Female ☐ T-Transgender
Marital Status* ☐ Married ☐ Unmarried ☐ Others ____
Residential Status* ☐ Resident Individual ☐ Non Resident Indian ☐ Foreign National ☐ Person of Indian Origin
Nationality* ☐ Indian ☐ Others

Signature / Thumb Impression

2. PROOF OF IDENTITY AND ADDRESS* (Please refer instruction B at the end)

(Certified copy of any one of the following Proof of Identity[PoI] needs to be submitted)
I Certified copy of OVD or equivalent d-documents of OVD or OVD obtained through digital KYC process needs to be submitted (anyone of the following OVDs)

I ☐ A- Passport Number ____________
☐ B- Voter ID Card ____________
☐ C- PAN Card ____________
☐ D- Driving Licence ____________ Driving Licence Expiry Date D D — M M — Y Y Y Y
☐ E- UID (Aadhaar) ____________
☐ F- NREGA Job Card ____________
☐ G- Others ____________
☐ H- National Population Register Letter ____________ Identification Number ____________
☐ I- Proof of Possession of Aadhar ____________
II ☐ E-KYC Authentication ____________
III ☐ Offline verification of Aadhar ____________

Address
Line 1* ____________
Line 2 ____________
Line 3 ____________ City / Town / Village* ____________
District* ____________ Pin / Post Code* ____________ State / U.T Code* ____________ ISO 3166 Country Code* ____________
State* ____________ Country* ____________

3. CURRENT ADDRESS DETAILS (Please refer instructions B at the end)

☐ Same as above mentioned address (in such cases address details as below need not be provided)

I Certified copy of OVD or equivalent d-documents of OVD or OVD obtained through digital KYC process needs to be submitted (anyone of the following OVDs)

I ☐ A- Passport Number ____________
☐ B- Voter ID Card ____________
☐ C- PAN Card ____________
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Address
Line 1* ______
Line 2 ______
Line 3 ______ City / Town / Village* ______
District* ______ Pin / Post Code* ______ State / U.T Code* ______ ISO 3166 Country Code* ______
State* ______ Country* ______

☐ 4. CORRESPONDENCE / LOCAL ADDRESS DETAILS * (Please see instruction E at the end)

☐ Same as Current / Permanent / Overseas Address details (In case of multiple correspondence / local addresses, please fill ' Annexure A1')

I ☐ A- Passport Number ______
☐ B- Voter ID Card ______
☐ C- PAN Card ______
☐ D- Driving Licence ______ Driving Licence Expiry Date D D — M M — Y Y Y Y
☐ E- UID (Aadhaar) ______
☐ F- NREGA Job Card ______
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Address
Line 1* ______
Line 2 ______
Line 3 ______ City / Town / Village* ______
District* ______ Pin / Post Code* ______ State / U.T Code* ______ ISO 3166 Country Code* ______
State* ______ Country* ______

☐ 5. CONTACT DETAILS 7. REMARKS (If any) (All communications will be sent on provided Mobile no. / Email-ID) (Please refer instruction F at the end)

Tel. (Off) ______ ______ Tel. (Res) ______ — ______ Mobile ______ — ______
FAX ______ ______ Email ID ______

☐ REMARKS (If any)

6. Applicant Declaration

I/We hereby declare that the KYC details furnished by me are true and correct to the best of my/our knowledge and belief and I/we under -take to inform you of any changes therein, immediately. In case any of the above information is found to be false or untrue or misleading or misrepresenting, I am/We are aware that I/We may be held liable for it.
I hereby consent to receiving information from Central KYC Registry through SMS/Email on the above registered number/email address.
I/We hereby consent to receiving information from CVL KRA through SMS/Email on the above registered number/Email address.
I am/We are also aware that for Aadhaar OVD based KYC, my KYC request shall be validated against Aadhaar details. I/We hereby consent to sharing my/our masked Aadhaar card with readable QR code or my Aadhaar XML/Digilocker XML file, along with passcode and as applicable, with KRA and other Intermediaries with whom I have a business relationship for KYC purposes only.

PLACE: ______________________ DATE: ____________ (DD-MM-YYYY)

Applicant e- SIGN	Applicant Wet Signature

7. For Office Use Only

Documents Received ☐ Certified Copies ☐ E-KYC data received from UIDAI ☐ Data received from Offline verification
☐ Digital KYC Process ☐ Equivalent e-documents ☐ Video based KYC

In-Person Verification (IPV) carried out by*	Intermediary Details*
Date D D — M M — Y Y Y Y Emp. Name ______ Emp. Code ______ Emp. Designation ______ Emp. Branch ______	☐ Self certified document copies received (OVD) ☐ True Copies of documents received (Attested) AMC / Intermediary Name :
Angel One Ltd. Seal/Stamp of the Intermediary Employee Signature and Stamp	Angel One Ltd. Seal/Stamp of the Intermediary

Know Your Client (KYC) Application Form (For NRI and FNC Only)

Please fill the form in ENGLISH and in BLOCK letters

Fields marked * are mandatory

Fields marked ' are pertaining to CKYC and mandatory only if processing CKYC also

AngelOne | CDSL VENTURES LIMITED ....Exploring New Horizons | CERSAI

Application Number:

SECOND HOLDER

Application Type*: O New KYC O Modification KYC

KYC Mode*: Please Tick (✓)

☐ Normal ☐ EKYC OTP ☐ EKYC Biometric ☐ Online KYC ☐ Offline EKYC ☐ Digilocker

☐ 1. PERSONAL DETAILS (Please refer instruction A at the end)

☐ Name* (Same as ID proof) Prefix ______ ______________________

(If any*) Maiden Name ______ ______________________

Father / Spouse Name ______ ______________________

Mother Name ______ ______________________

Date of Birth* ______________________

PAN* ______________________

PHOTO

Signature / Thumb Impression

Gender* ☐ M- Male ☐ F- Female ☐ T-Transgender

Marital Status* ☐ Married ☐ Unmarried ☐ Others ______

Residential Status* ☐ Resident Individual ☐ Non Resident Indian ☐ Foreign National ☐ Person of Indian Origin

Nationality* ☐ Indian ☐ Others

☐ 2. PROOF OF IDENTITY AND ADDRESS* (Please refer instruction B at the end)

(Certified copy of any one of the following Proof of Identity[PoI] needs to be submitted)

| Certified copy of OVD or equivalent d-documents of OVD or OVD obtained through digital KYC process needs to be submitted (anyone of the following OVDs)

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☐ D- Driving Licence ______________________ Driving Licence Expiry Date D D — M M — Y Y Y Y

☐ E- UID (Aadhaar) ______________________

☐ F- NREGA Job Card ______________________

☐ G- Others ______________________

☐ H- National Population Register Letter ______________________ Identification Number ______________________

☐ I- Proof of Possession of Aadhar ______________________

II ☐ E-KYC Authentication ______________________

III ☐ Offline verification of Aadhar ______________________

Address

Line 1* ______________________

Line 2 ______________________

Line 3 ______________________ City / Town / Village* ______________________

District* ______________________ Pin / Post Code* ______________________ State / U.T Code* ______________________ ISO 3166 Country Code* ______________________

State* ______________________ Country* ______________________

3. CURRENT ADDRESS DETAILS (Please refer instructions B at the end)

☐ Same as above mentioned address (in such cases address details as below need not be provided)

| Certified copy of OVD or equivalent d-documents of OVD or OVD obtained through digital KYC process needs to be submitted (anyone of the following OVDs)

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State* ____ Country* ____

4. CORRESPONDENCE / LOCAL ADDRESS DETAILS * (Please see instruction E at the end)

☐ Same as Current / Permanent / Overseas Address details (In case of multiple correspondence / local addresses, please fill ' Annexure A1')

I ☐ A- Passport Number ____
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☐ C- PAN Card ____
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District* ____ Pin / Post Code* ____ State / U.T Code* ____ ISO 3166 Country Code* ____
State* ____ Country* ____

5. CONTACT DETAILS 7. REMARKS (If any) (All communications will be sent on provided Mobile no. / Email-ID) (Please refer instruction F at the end)

Tel. (Off) ____ ____ Tel. (Res) ____ – ____ Mobile ____ – ____
FAX ____ ____ Email ID ____

REMARKS (If any)

6. Applicant Declaration

	Applicant e- SIGN	Applicant Wet Signature
I/We hereby declare that the KYC details furnished by me are true and correct to the best of my/our knowledge and belief and I/we under -take to inform you of any changes therein, immediately. In case any of the above information is found to be false or untrue or misleading or misrepresenting, I am/We are aware that I/We may be held liable for it. I hereby consent to receiving information from Central KYC Registry through SMS/Email on the above registered number/email address. I/We hereby consent to receiving information from CVL KRA through SMS/Email on the above registered number/Email address. I am/We are also aware that for Aadhaar OVD based KYC, my KYC request shall be validated against Aadhaar details. I/We hereby consent to sharing my/our masked Aadhaar card with readable QR code or my Aadhaar XML/Digilocker XML file, along with passcode and as applicable, with KRA and other Intermediaries with whom I have a business relationship for KYC purposes only. PLACE: ____ DATE: ____ (DD-MM-YYYY)		

7. For Office Use Only

Documents Received ☐ Certified Copies ☐ E-KYC data received from UIDAI ☐ Data received from Offline verification
☐ Digital KYC Process ☐ Equivalent e-documents ☐ Video based KYC

In-Person Verification (IPV) carried out by*	Intermediary Details*
Date D D — M M — Y Y Y Y Emp. Name ____ Emp. Code ____ Emp. Designation ____ Emp. Branch ____	☐ Self certified document copies received (OVD) ☐ True Copies of documents received (Attested) AMC / Intermediary Name :
Angel One Ltd. Seal/Stamp of the Intermediary Employee Signature and Stamp	Angel One Ltd. Seal/Stamp of the Intermediary

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CERSAI

Application Number:

THIRD HOLDER

Application Type*: O New KYC O Modification KYC

KYC Mode*: Please Tick (✓)

☐ Normal ☐ EKYC OTP ☐ EKYC Biometric ☐ Online KYC ☐ Offine EKYC ☐ Digilocker

1. PERSONAL DETAILS (Please refer instruction A at the end)

Prefix

☐ Name* (Same as ID proof)

(If any*) Maiden Name

Father / Spouse Name

Mother Name

Date of Birth*

PAN*

PHOTO

Signature / Thumb Impression

Gender* ☐ M- Male ☐ F- Female ☐ T-Transgender

Marital Status* ☐ Married ☐ Unmarried ☐ Others

Residential Status* ☐ Resident Individual ☐ Non Resident Indian ☐ Foreign National ☐ Person of Indian Origin

Nationality* ☐ Indian ☐ Others

2. PROOF OF IDENTITY AND ADDRESS* (Please refer instruction B at the end)

(Certified copy of any one of the following Proof of Identity[PoI] needs to be submitted)

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☐ B- Voter ID Card

☐ C- PAN Card

☐ D- Driving Licence — Driving Licence Expiry Date D D — M M — Y Y Y Y

☐ E- UID (Aadhaar)

☐ F- NREGA Job Card

☐ G- Others

☐ H- National Population Register Letter — Identification Number

☐ I- Proof of Possession of Aadhar

II ☐ E-KYC Authentication

III ☐ Offline verification of Aadhar

Address

Line 1*

Line 2

Line 3 City / Town / Village*

District* Pin / Post Code* State / U.T Code* ISO 3166 Country Code*

State* Country*

3. CURRENT ADDRESS DETAILS (Please refer instructions B at the end)

☐ Same as above mentioned address (in such cases address details as below need not be provided)

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☐ G- Others

☐ H- National Population Register Letter — Identification Number

☐ I- Proof of Possession of Aadhar

II ☐ E-KYC Authentication

III ☐ Offline verification of Aadhar

Address

Line 1* ____________________

Line 2 ____________________

Line 3 ____________________ City / Town / Village* __________

District* __________ Pin / Post Code* __________ State / U.T Code* ______ ISO 3166 Country Code* ______

State* __________ Country* __________

☐ 4. CORRESPONDENCE / LOCAL ADDRESS DETAILS * (Please see instruction E at the end)

☐ Same as Current / Permanent / Overseas Address details (In case of multiple correspondence / local addresses, please fill ' Annexure A1')

I ☐ A- Passport Number __________

☐ B- Voter ID Card __________

☐ C- PAN Card __________

☐ D- Driving Licence __________ Driving Licence Expiry Date D D — M M — Y Y Y Y

☐ E- UID (Aadhaar) __________

☐ F- NREGA Job Card __________

☐ G- Others __________

☐ H- National Population Register Letter __________ Identification Number __________

☐ I- Proof of Possession of Aadhar __________

II ☐ E-KYC Authentication __________

III ☐ Offline verification of Aadhar __________

Address

Line 1* ____________________

Line 2 ____________________

Line 3 ____________________ City / Town / Village* __________

District* __________ Pin / Post Code* __________ State / U.T Code* ______ ISO 3166 Country Code* ______

State* __________ Country* __________

☐ 5. CONTACT DETAILS 7. REMARKS (If any) (All communications will be sent on provided Mobile no. / Email-ID) (Please refer instruction F at the end)

Tel. (Off) ____ ________ Tel. (Res) ____ — ________ Mobile ___ — ________

FAX ____ ________ Email ID ________________

☐ REMARKS (If any)

6. Applicant Declaration

I/We hereby declare that the KYC details furnished by me are true and correct to the best of my/our knowledge and belief and I/we under-take to inform you of any changes therein, immediately. In case any of the above information is found to be false or untrue or misleading or misrepresenting, I am/We are aware that I/We may be held liable for it.

I hereby consent to receiving information from Central KYC Registry through SMS/Email on the above registered number/email address.

I/We hereby consent to receiving information from CVL KRA through SMS/Email on the above registered number/Email address.

I am/We are also aware that for Aadhaar OVD based KYC, my KYC request shall be validated against Aadhaar details. I/We hereby consent to sharing my/our masked Aadhaar card with readable QR code or my Aadhaar XML/Digilocker XML file, along with passcode and as applicable, with KRA and other Intermediaries with whom I have a business relationship for KYC purposes only.

PLACE: ________________ DATE: ________ (DD-MM-YYYY)

Applicant e- SIGN	Applicant Wet Signature

7. For Office Use Only

Documents Received ☐ Certified Copies ☐ E-KYC data received from UIDAI ☐ Data received from Offline verification

☐ Digital KYC Process ☐ Equivalent e-documents ☐ Video based KYC

In-Person Verification (IPV) carried out by*	Intermediary Details*
Date D D — M M — Y Y Y Y Emp. Name ________ Emp. Code ________ Emp. Designation ________ Emp. Branch ________	☐ Self certified document copies received (OVD) ☐ True Copies of documents received (Attested) AMC / Intermediary Name :
Angel One Ltd. Seal/Stamp of the Intermediary Angel One Ltd. Employee Signature and Stamp	Angel One Ltd. Seal/Stamp of the Intermediary Angel One Ltd.

TRADING ACCOUNT RELATED DETAILS - NRE

A. BANK ACCOUNT DETAILS

Bank 1 : Bank Name & Address:			
NRE Saving A/c No.			
MICR Code		IFSC Code	
Bank 2 : Bank Name & Address:			
NRE PIS A/c No.			
RBI Approval Date	DD / MM / YYYY	RBI Reference No	
MICR Code		IFSC Code	

B. DEPOSITORY ACCOUNT DETAILS

	DP 1 Details	DP 2 Details
Depository	☑ CDSL	☐ CDSL ☐ NSDL
DP Name	Angel One Ltd	
Client Name		
DP ID	12033200, 12033201, 12033202, 12033203 & 12033204	
Client ID		

DEMAT ACCOUNT RELATED ADDITIONAL DETAILS (TO BE FILLED BY DEPOSITORY PARTICIPANT)

DP Internal Ref. No.		

C. TYPE OF ACCOUNT (PLEASE TICK WHICHEVER IS APPLICABLE)

Status	Sub Type	
☐ NRI	☐ NRI Repatriable	☐ Others (Specify):

TRADING ACCOUNT RELATED DETAILS - NRO

A. BANK ACCOUNT DETAILS

Bank 1 : Bank Name & Address:			
NRO Saving A/c No.			
MICR Code		IFSC Code	
Bank 2 : Bank Name & Address:			
NRO PIS A/c No.			
RBI Approval Date	DD / MM / YYYY	RBI Reference No	
MICR Code		IFSC Code	

B. DEPOSITORY ACCOUNT DETAILS

	DP 1 Details	DP 2 Details
Depository	☑ CDSL	☐ CDSL ☐ NSDL
DP Name	Angel One Ltd	
Client Name		
DP ID	12033200, 12033201, 12033202, 12033203 & 12033204	
Client ID		

Note: In case of any correction in the form - Sign next to the correction done & Sign has to match the original signature

DEMAT ACCOUNT RELATED ADDITIONAL DETAILS (TO BE FILLED BY DEPOSITORY PARTICIPANT)

DP Internal Ref. No.		

C. TYPE OF ACCOUNT (PLEASE TICK WHICHEVER IS APPLICABLE)

Status	Sub Type		
☐ NRI	☐ NRI Non-Repatriable	☐ Others (Specify):	

TRADING ACCOUNT RELATED DETAILS - FNC (Foreign National Client)

A. OVERSEAS BANK ACCOUNT DETAILS

Bank Name:	
Bank A/c No.	
Bank Branch Address:	
Swift Id:	
IBAN Number:	
Sort Code:	
Currency of Remittance	

B. DEPOSITORY ACCOUNT DETAILS

	DP 1 Details	DP 2 Details
Depository	☑ CDSL	☐ CDSL ☐ NSDL
DP Name	Angel One Ltd	
Client Name		
DP ID	12033200, 12033201, 12033202, 12033203 & 12033204	
Client ID		

DEMAT ACCOUNT RELATED ADDITIONAL DETAILS (TO BE FILLED BY DEPOSITORY PARTICIPANT)

DP Internal Ref. No.		

C. TYPE OF ACCOUNT (PLEASE TICK WHICHEVER IS APPLICABLE)

Sub Type		
☐ FNC (Foreign National Client)	☐ Others (Specify):	

**** Pls note that Indian Bank account (Saving, Current & PIS) cannot be linked with any Foreign National account, only overseas bank account details should be mentioned above.**

FH

(First/Sole Holder Signature)

SH

(Second Holder Signature)

TH

(Third Holder Signature)

D. DEALING THROUGH AUTHORISED PERSON (AP) / OTHER STOCK BROKERS

If Yes, please specify:			
Name of Stock Broker		Name of AP	
Name of Exchange		Client Code (as given by other broker)	
Details of disputes/dues pending from/to such stock broker:			
Whether you are a Member / AP of any Exchange		☐ Yes ☐ No	
If yes, provide SEBI REGISTRATION NO:			

E. STANDING INSTRUCTIONS / OTHER DETAILS / EMAIL-SMS ALERT / CONTRACT NOTE PREFERENCE

Contract Note/Holding & Transaction Statement including CAS/Other Documents* (For ECN in commodity segment, please refer pg. no. 9)	☐ Electronic ☐ Physical	
Receive Delivery Instruction Slip	☐ No ☐ Yes	
Share Email ID with Registrar & Transfer Agent	☐ No ☐ Yes	
Receive Annual Report	☐ Electronic ☐ Physical ☐ Both	
DP Account Statement	☐ Monthly ☐ Fortnightly ☐ Weekly ☐ As per SEBI Regulation	
Declaration for Mobile Number	☐ Self ☐ Spouse ☐ Child ☐ Parent	
Declaration for Email ID	☐ Self ☐ Spouse ☐ Child ☐ Parent ☐ Do not have	
Bill-to-bill settlement	☐ Yes ☐ No	
Running Account Settlement	☐ Monthly ☐ Quarterly	
Whether you wish to avail of the facility of internet trading / wireless technology (please specify)	☐ Yes ☐ No	
SMS Alert Facility - Mandatory if you are giving Power Of Attorney (PoA). Ensure that the mobile number is provided in the KYC Application Form.	☐ Yes ☐ No	

Note:

1. Dividend / Interest will be credited to bank account via ECS.

2. In case client doesn't opt for DIS booklet, it would be issued on request at any later date.

3. BO can view his ISIN balances, transactions & value portfolio online. To register for Easi please visit website www.cdslindia.com

F. INFORMATION FOR PREVENTION OF MONEY LAUNDERING ACT, 2002

Experience	Number of years of Investment / Trading Experience ☐☐	
Gross Annual Income	☐ Below 1 lac ☐ 1-5 Lacs ☐ 5-10 Lacs ☐ 10-25 Lacs ☐ >25 Lacs OR Net Worth in ` (*Net worth should not be older than 1 year) as on date DD / MM / YYYY	
Occupation (Please tick)	☐ Govt Service ☐ Professional ☐ Private Sector Service ☐ Public Sector ☐ Business ☐ Retired ☐ Agriculturist ☐ Housewife ☐ Student ☐ Others (Pls Specify)________________________	
Nature of Business	☐ Manufacturing ☐ Services ☐ Trading ☐ Consultancy ☐ Others______________________________	
Is the Client Politically Exposed Person (PEP) or Related to a PEP	☐ Yes ☐ No	

G. TRADING PREFERENCES *Please sign in the relevant boxes where you wish to trade. The segment not chosen should be struck off by the client

Please sign in the relevant boxes where you wish to trade.
Please strike off the segment not chosen by you.

Exchanges	NSE & BSE		
All Segments	Cash	Mutual Fund	F & O

H. PAST ACTIONS

Details of any action / proceedings initiated / pending / taken by SEBI / Stock exchange / any other authority against the applicant / constituent or its Partners / promoters / whole time directors /authorized persons in charge of dealing in securities during the last 3 years:

☐ No ☐ If yes, please specify

I. INTRODUCER DETAILS

Status of Introducer ☐ AP ☐ Employee ☐ Existing Client ☐ Others (Specify):

Introducer Name: Emp/Client Code:

Address:

Mobile No:

Signature of the Introducer

DECLARATION

I / We declare that the particulars given by me/us above are true and to the best of my/our knowledge as on the date of making this application. I/We agree and undertake to intimate the DP/Stock broker any change(s) in the details / particulars mentioned by me / us in this form. I/We further agree that any false / misleading information given by me / us or suppression of any material information will render my account liable for termination and suitable action.

I / We have received, read and understood the 'Rights and Obligations Document' for trading and DP Services, 'Risk Disclosure Document', 'Guidance Note' and agree to abide by and be bound by the same and by the Bye-Laws as are in force from time to time. I/We also confirm having read/been explained and understood the contents of the document on policy and procedures of the stock broker and the tariff sheet. I / We have also the informed that the standard set of documents has been displayed for information on stock broker's designated website i.e. www.angelone.in.

FH

(Account Holder Signature)

Place: ____________________________ Date: DD / MM / YYYY

Note: In case of any correction in the form - Sign next to the correction done & Sign has to match the original signature

Trading cum Demat Tariff for Individual - Custom Plan

Delivery (%)	Equity Intraday / Futures (Each Leg) (%)	Options (Per Lot in ₹) Each Leg		
		Nifty	Stock	Currency

Minimum brokerage of paisa per share for Trading & paisa per share for Delivery will be charged.

DP AMC Charges	INR 60 per quarter from 2nd year onwards.
Transaction charges for sell (Debit) & Inter-settlement Debit per transaction (Refer Note No. 6 a)	Rs. 20
Auto square off charges	Rs. 20
Pledge / Unpledge Creation/ Closure/Invocation (Refer Note No. 6 b)	Rs. 20
Demat/Remat (Per Certificate) Additional DIS requisition Additional Statement Physical Contract Note	Rs. 50
Cheque Bounce Charges	Rs. 350
DDPI Charges	Rs. 100 + GST

Notes :

1. Brokerage is levied per executed order across all segments Brokerage is also charged on expired, exercised and assigned options contract. Brokerage levied to your trading account is subject to the maximum rates prescribed by the regulator (s) from time to time.
2. Stamp Duty, GST, Education Cess & Statutory Levies will be charged as applicable. Details of such charges are provided here- https://www.angelone.in/exchange-transaction-charges. The said levies are subject to statutory and regulatory changes, as notified by the Government/Regulators/Exchanges from time to time.
3. Above tariff is subject to change. Price Changes, if any, (other than statutory/regulatory price changes as stipulated in Point 2. above) will be notified 30 (thirty) days in advance.
4. For availing "Easiest" facility of CDSL, the charges as levied by CDSL would be collected from client at actuals

FH | SH | TH

(First/Sole Holder Signature) (Second Holder Signature) (Third Holder Signature)

STANDING INSTRUCTION TO MAINTAIN RUNNING ACCOUNT (VOLUNTARY)

I / We request you to maintain my/our accounts for funds on running accounts basis instead of 'bill to bill' settlement basis, unless I/we specifically request you for a payout of available free funds in the account. You may settle the accounts at Monthly/Quarterly (as opted in the account opening form) or at such other intervals as SEBI/ Exchanges may specify from time to time. I / We further authorize you to retain funds as may be permitted by Exchanges/SEBI from time to time or towards other unbilled services and/or charges applicable on my account, while settling the accounts. I / We understand and agree that no interest will be payable on the amount of funds retained by you as above. The standing instruction/authorization for maintaining my/our account as running account shall remain valid until revoked in writing, addressed to you.

Client Code: ____________________

FH

(Account Holder Signature)

VOLUNTARY TERMS AND CONDITIONS

Whereas the client intends to open securities / commodities trading accounts with Angel One Ltd., (hereinafter referred as Angel) for the purpose of trading in Capital Market Segment, Futures & Options and Currency Derivative Segments and Commodities Futures & Options of the National Stock Exchange of India Ltd., the Bombay Stock Exchange Ltd., the Metropolitan Stock Exchange of India Limited, Multi Commodity Exchange, National Commodity & Derivatives Exchange Limited and Mutual Fund transactions Facilities offered by Stock Exchange and whereas for the purpose of more fully and conveniently availing of the services agreed to be provided by Angel and also the additional services that may be made available by Angel from time to time, the Client, on its own free will and volition, agrees to accept and be bound by the following terms and conditions. The Client understands that these terms and conditions are voluntary i.e, non-mandatory in nature but on their acceptance, these shall constitute the contract between the parties and bind them fully and be enforceable by each party against the other.

1. Authorization to debit additional charges with regard to Trading and Demat Account: Without prejudice to the other rights and obligations of the parties, the client understands and agrees that Angel may levy additional charges including Annual Maintenance Charges and all transaction charges with respect to Clients Demat account / Counter Demat account for any service rendered by Angel and as may be required by the Client, and recover from the Client all reasonable costs, as may be incidental or consequential for rendering the said services. The said charges will be debited to the clients ledger account with Angel One.

2. Payment by cheque: Where payment by the client towards margin money is made throughcheque / pay order / demand draft issued in favor of Angel, trades may be executed at the discretion of Angel only upon realization of the funds of the said cheque / pay order / demand draft.

3. Lien: All securities, commodities funds and/or properties (Any assets available with Angel) of the Client as may be permitted by the Exchange(s) from time to time to be placed with Angel shall be subject to a lien for the payments or fulfillment of all undischarged liabilities and obligations of the Client in relation to its transactions or owing to any of the group companies of Angel. Angel shall be entitled to withhold such securities, commodities, funds and/or property of the Client as security towards any such un-discharged liabilities or obligation of the Client and to sell and/or appropriate to itself all such securities, commodities, funds or properties at its sole discretion & at any point of time, without notice to client.

4. Authorization for delivering / pledging shares: The client understands and agrees that Angel may deliver to the Exchange any securities held by it on behalf of the client to discharge settlement obligations in respect of securities sold by the client or pledge the same with the clearing house of the recognized stock exchange in any segment where the Client is registered for trading for the purpose of providing margin for the trading positions contracted or to be contracted by the Client or with any scheduled commercial bank, Non-Banking Financial Institution or other financial institution for raising funds to the extent account of the client carries debit balance but without any obligation on its part to so raise funds by pledging the securities and without prejudice to the right of Angel to enforce, at its option, the collateral security in the securities to recover the debit balance at any time.

5. Authorization for Inter segment fund balance transfer and stock transfers: The client hereby authorizes Angel to transfer its debit/credit balances in the ledger account arising during the course of trades in any segment including commodities segment to its ledger account in any other segment including commodities segment or to transfer any stock purchased/lying in its account in any segment including commodities segment to its account in any other segment as often as may be required. The transfers may be completed by passing journal entries in the books of Angel.

6. Disclaimer: The Client understands and agrees that neither Angel nor any other party disseminating any market data, message or information through the Website of Angel or in any other media shall be liable for:

(a) Any inaccuracy, error, omission or delay in the transmission or delivery of any such data, information or message, or

(b) Any loss or damage arising from or occasioned by (i) Any such inaccuracy, error, delay or omission, (ii) Nonperformance, or (iii) Interruption in making available any such data, information or message, due to either any act or omission by Angel or any disseminating party or to any "force majeure" (e.g. flood, extraordinary weather condition, earthquake or other act of nature, fire, war, insurrection, riot, labour dispute/unrest, accident, action of government, communications or power failure, equipment or software malfunction) or any other cause beyond the reasonable control of Angel or any disseminating party.

7. Manner and Mode of placing orders/instructions: The Client may communicate orders and other instructions to Angel or the sub-broker/authorised person as the case may be over phone at the designated contact telephone number, or in writing, or through designated email, or by personally visiting the designated office. Client may use any one or more of these means as may be permitted by the SEBI / Exchanges from time to time for placing orders.

8. Nonexecution/ delay/cancellation of Orders: The Client may communicate orders and other instructions to Angel or the authorised person as the case may be over phone at the designated contact telephone number, or in writing, or through designated email, or by personally visiting the designated office. The client hereby agrees that Angel or the Exchanges shall not be liable for non execution or partial execution of any orders caused due to suspension, interruption, or malfunctioning of the online as well as offline trading services, disruptions or congestion of communication net works, hardware or software problems, or failure of the electronic trading beyond the control of Angel or the Exchange.

9. Client not to act on representations of agents, employees: Client is aware that Angel has not authorized any agents, representatives, employees or other persons to make any representation, or to give any promise, assurance, warranty, undertaking or commitment as to return on investment of the Client whether in writing or otherwise on behalf of Angel.

10. Recording of Conversation: The client is aware and agrees that Angel may tape record the conversation between the client/client's representative and Angel, whether over the telephone or in person, as per applicable laws, rules and regulations of SEBI / Exchanges. Angel may produce before competent authorities, voluntarily or on such production being required by such authorities, recorded conversation or transcript thereof or both as valid evidence of the content of the conversation so recorded.

11. Confidentiality of Client Details: Angel may disclose the client information to any person /entity as required under the law or to any broker's Association or organisations in case of dispute in order to take informed decision. The Client hereby agrees and give its consents for the disclosure by Angel to any person or entity including but not limited to any independent third parties or any entities of Angel Group, whether within or outside India, of any information and data relating to Client or relating to Client's trading account with Angel for the purposes of or in connection with, any present or proposed initiatives, including but not limited to any marketing or cross sell initiatives, business proposals, activities, facilities or services availed of or to be availed, by Client in future.

12. Disclosure as to Proprietary Trades by Angel: Angel may carry out proprietary trades in addition to trades on behalf of its Clients.

13. Severance: In case any one or more of the terms and conditions contained in this document become invalid, illegal or unenforceable in any respect under any applicable law, the validity, legality and enforceability of the remaining provisions contained herein shall not in any way be affected or impaired thereby.

14. No Waiver: No forbearance, relaxation or inaction by any party to require from the other erformance or discharge of any obligation to be performed or discharged by the other under this document shall in any way affect, diminish, or prejudice the right of such party to require of the other party at any time such performance or discharge, or performance or discharge of any other obligations under this document or be considered to be a waiver of any rights, unless the waiver is specifically agreed in writing.

15. Notices: All notices or communications issued by Angel shall be served on the Client in any one or more or all of the following ways at the ordinary business address and/or ordinary place of residence and/or last known address of the client:

15.1 (a) By ordinary post or (b) By registered post or (c) By express delivery post or (d) by SMS on registered mobile or by telephonic call or (e) By affixing it on the door at the last known business or residential address or (f) By oral communication to the party or on the last known telephone number or on the recording machine of such number or (g) By advertising it in at least one rominent daily newspaper having circulation in the area where the last known business or residential address of the client is situated or (h) By publishing it on the website of Angel wherein secured log-id and password to Client is provided or (i) By a notice posted on the notice board of the Exchange if no address be known or (j) By electronic mail or fax or (k) By hand delivery or By Courier or any other approved mode as may be allowed for communication.

15.2 Notwithstanding anything stated above, communication relating to orders, margins, maintenance calls and other similar matters in the ordinary course of dealings between Angel and the Client may be made orally.

16. Electronic Contract Note (ECN):

16.1. Client agree to receive contract notes in Electronic/Digital Form (ECN) authenticated by means of a digital signature in lieu of Physical Contract notes through e-mail by authorizing Angel in this connection and providing the e-mail address(es) at which the Client wishes the ECN to be sent.

16.2. The Client shall access and verify the ECN and all information contained therein, In case of discrepancy the Client, shall inform Angel either in writing or via E-mail within reasonable time of the receipt of the same. Angel shall also publish the Contract Note on the Web site www.angelone.in or on any other designated location specified by Angel from time to time. The Client will be issued a login and password by which the Client can login in to his account and view/save/print the ECN. Should the Client experience any difficulty in opening the ECN, Angel may, on advice by the Client, make the Contract Note available by any other means (e-mail, electronic mail attachment, or in the form of an available download from the back office web site or by delivery of a hard copy). Client's failure to advice Angel of such a difficulty shall amount to valid delivery and viewing of the document by the Client.

17. In the event of the Contract notes (ECN) not received by me/us in electronic mode due to the mail bouncing/failure of email servers, loss of connectivity etc. I/we agree to acknowledge the receipt of Contract Notes in physical mode, provided such Contract Notes are received by me/us within the time specified by regulatory authorities. In case you do not receive intimation of the mail bouncing, the same will be construed as my/our confirmation to the receipt of Contract Notes (ECN) in electronic mode and you will not be required to send the Contract Notes in physical mode. In this connection, I/we hereby confirm that I/we am/are agreeable to receive Contract Notes in digital mode on my/our under mentioned email id. I/We understand that I/we am/are required to intimate any changes in the e mail id mentioned above needs to be communicated by me/us.

18. Electronic Payment Gateway for Net Banking Services: Angel may provide on its internet trading website, without additional cost to the Client, access to Electronic Payment Gateways provided by

various banks for facilitating transfer of funds from Client's bank account to the account of the Client with Angel. Client understands that Angel is only providing access to the electronic fund transfer facility provided by the banker of the Client through Angel's website by means of an interface and is not liable or responsible for the proper functioning or otherwise of the Gateway or for any transaction errors, losses, malfunctioning or hacking of the system by unscrupulous elements, frauds, and/or any incidental or consequential claims arising thereout. Client undertakes not to make Angel a party to any litigation, claim, dispute, difference or complaint that the Client may initiate in respect of, arising out of or in connection with any transactions on the Gateway and agrees that Angel's liability shall at all time be limited to the amount actually received in its account by electronic transfer from Client's account with the Bank.

19. Internet / Wireless Technology based Trading facility:

19.1. Angel offers Internet and mobile Trading facility for transaction in securities on the concerned Exchanges including facilities for online application of IPO / FPO / NFO / Bond issues or any other issues of securities or services to apply/purchase/redeem/ sale/buyback or otherwise deal in the units of Mutual Funds (hereinafter referred to as "the Internet/wireless Trading system") through Exchange approved software. The Client can route its orders to Angel over the internet/mobile/laptop with data card or any other devices which use internet protocol for purchasing, selling and dealing in securities. The Client may avail of such Trading facility provided by Angel by complying with the formalities prescribed therefore.

19.2. Non-usage of Internet/Wireless Trading Facility: If the Client does not use the Internet/Wireless Trading Facility for a continuous period of 3 months or such other period as Angel may notify, the facility may be deactivated without notice and the Client shall comply with the prescribed formalities for reactivating the facility. Trades can, however, be executed at all time by placing orders off-line with the concerned branch of Angel.

19.3. The client understands and agrees that Angel has different product of the Internet Trading /Wireless Trading softwares which have been approved by the Exchanges and the client shall be allotted such product as may be chosen by him. The client also understands and agrees that depending on the trading activity of the client, Angel shall have the exclusive right and liberty to change the product version allotted to the client and allot a different product version of the Internet Trading/Wireless Trading facility.

19.4. Orders of Client subject to review by Angel: The Client agrees that the Angel may, on being suspicious of any of the transactions, review any order placed by a Client, which may cause delays in the processing of the Client's order or may result in rejection of such order."

20. Extra Ordinary Events and termination/suspension of trading facility: Angel will not be liable for losses caused directly or indirectly by government restriction, Exchange rulings, suspension of trading, computer, communication, telephone or system failure, war, earthquakes, flood, accident, power failure, equipment or software malfunction, lack of connectivity, congestion or disruption of communication net-work or links, software glitches or corruption, low processing speed, strikes or any other conditions beyond Angel's control resulting in nonexecution, partial or incomplete execution of orders and the resulting financial loss, if any Angel may at any time terminate, discontinue or temporarily suspend trading facility provided to the Client in the event of any such extraordinary event occurring without giving prior notice to the Client.

21. Amendments to the terms and conditions: Angel reserves the right to amend the terms and conditions herein contained by adding, deleting, modifying or varying the provisions thereof by giving 15 days notice to the Client. In the event where the client has not objected to revised terms and conditions within 15 days of receiving the notification, the same shall be binding on the client.

22. Mutual Fund Service System Facility / BSE Star MF: Client is registered with Angel One and has executed Know Your Form and certain other documents for the purpose of trading in securities market on the recognized Stock Exchange (herein after referred as "Exchange"). Incase client opts for the purpose of dealing in the units of Mutual Funds Schemes permitted to be dealt with on the SEBI recognized Stock Exchanges (Mutual Fund Transaction Facilities). Know Your Client details as submitted by the client for the stock broking shall be considered for the purpose of Mutual fund transaction facilities and abide by the terms and conditions as mentioned in the circulars as may be specified by the Exchanges from time to time in this regard. Client shall also ensure compliance with the requirements as may be specified from time to time by Securities and Exchange Board of India and Association of Mutual Funds of India (AMFI). Client shall read & understand the contents of the Scheme Information Document and Key Information Memorandum, addendum issued regarding each Mutual Fund Schemes with respect to which client choose to subscribe / redeem. Client further agree to abide by the terms and conditions, rules and regulations of the Mutual Fund Schemes. Client confirm to have read & understood the terms & conditions for using Mutual Fund transaction facility as stated in KYC handout (customer copy).

I/We hereby confirm to have read and understood the terms and conditions as mentioned above and agree to abide by the same.

FH

(Account Holder Signature)

Most Important Terms and Conditions (For non-custodial settled trading accounts)

1. Your trading account has a "Unique Client Code" (UCC), different from your demat account number. Do not allow anyone (including your own stock broker, their representatives and dealers) to trade in your trading account on their own without taking specific instruction from you for your trades. Do not share your internet/ mobile trading login credentials with anyone else.

2. You are required to place collaterals as margins with the stock broker before you trade. The collateral can either be in the form of funds transfer into specified stock broker bank accounts or margin pledge of securities from your demat account. The bank accounts are listed on the stock broker website. Please do not transfer funds into any other account. The stock broker is not permitted to accept any cash from you.

3. The stock broker's Risk Management Policy provides details about how the trading limits will be given to you, and the tariff sheet provides the charges that the stock broker will levy on you.

4. All securities purchased by you will be transferred to your demat account within one working day of the payout. In case of securities purchased but not fully paid by you, the transfer of the same may be subject to limited period pledge i.e. seven trading days after the pay-out (CUSPA pledge) created in favor of the stock broker. You can view your demat account balances directly at the website of the Depositories after creating a login.

5. The stock broker is obligated to deposit all funds received from you with any of the Clearing Corporations duly allocated in your name. The stock broker is further mandated to return excess funds as per applicable norms to you at the time of quarterly/ monthly settlement. You can view the amounts allocated to you directly at the website of the Clearing Corporation(s).

6. You will get a contract note from the stock broker within 24 hours of the trade.

7. You may give a one-time Demat Debit and Pledge Instruction (DDPI) authority to your stock broker for limited access to your demat account, including transferring securities, which are sold in your account for pay-in.

8. The stock broker is expected to know your financial status and monitor your accounts accordingly. Do share all financial information (e.g. income, networth, etc.) with the stock broker as and when requested for. Kindly also keep your email Id and mobile phone details with the stock broker always updated.

9. In case of disputes with the stock broker, you can raise a grievance on the dedicated investor grievance ID of the stock broker. You can also approach the stock exchanges and/or SEBI directly.

10. Any assured/guaranteed/fixed returns schemes or any other schemes of similar nature are prohibited by law. You will not have any protection/recourse from SEBI/stock exchanges for participation in such schemes.

FH	SH	TH
(First/Sole Holder Signature)	(Second Holder Signature)	(Third Holder Signature)

Place: ____________________________

Date: DD / MM / YYYY

Policy on Handling of Good Till Cancelled Orders of Client.

The GTT feature allows you to place a limit order, at the limit price selected by you (the order price) and a trigger price (the trigger price), only when the trigger price is met, your GTT order will be sent to the Exchange for execution at the order price. In case the order is triggered on any day and the order price is not exactly met, all such orders will be automatically cancelled and removed from the GTT queue at Angel One Limited at the end of trading session on the same day. All GTT orders triggered and sent to the Exchange, if not executed for any other reasons on the same day, will also be automatically cancelled. You will need to place the same GTT orders again.

- All GTT orders that do not meet the trigger price in 365 days shall be cancelled. 365 days shall be counted as consecutive calendar days from the date of placing the orders

- In case there is a change in exchange series or any corporate actions, such as; splits, bonuses, dividends, merger, reverse mergers, amalgamations, takeover, delisting, rights issue, etc. where there is a significant impact/change in the scrip price, the GTT will be cancelled at the sole discretion of Angel, one day prior to the Ex-date of such corporate action effect taking place on the stock price

- We shall also provide an intimation to the clients about the upcoming corporate actions at least 5 days prior to the Ex-date of corporate action.

FH	SH	TH
(First/Sole Holder Signature)	(Second Holder Signature)	(Third Holder Signature)

Place: ____________________________ Date: DD / MM / YYYY

(SEBI/HO/OIAE/OIAE_IAD-3/P/ON/2025/01650, dated January 10, 2025)

NOMINATION FORM FOR DEMAT ACCOUNTS AND MUTUAL FUND (MF) FOLIOS

Client Name		Trading Code		Client ID	

I / We hereby nominate the following person(s) who shall receive all the assets held in my / our account / folio in the event of my / our demise, as trustee and on behalf of my / our legal heir(s) *

Nominee Mandatory Details

Nominee	Name of Nominee	Share of nominee \ Relationship (%)**	Postal Address, Mobile number & E-mail	Identity Number ***	D.O.B. of nominee	Guardian
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						

*Joint Accounts:

Event	Transmission of Account / Folio to
Demise of one or more joint holder(s)	Surviving holder(s) through name deletion The surviving holder(s) shall inherit the assets as owners.
Demise of all joint holders simultaneously – having nominee	Nominee
Demise of all joint holders simultaneously – not having nominee	Legal heir (s) of the youngest holder

** If % is not specified, then the assets shall be distributed equally amongst all the nominees. Any odd lot after division / fraction of %, shall be transferred to the first nominee mentioned in the nomination form. (see table in 'Transmission aspects').
*** Provide only number: PAN or Driving Licence or Aadhaar (last 4). Copy of the document is not required. However, in case of NRI / OCI / PIO, Passport number is acceptable.
**** to be furnished only in following conditions / circumstances:
- Date of Birth (DoB): please provide, only if the nominee is minor.
- Guardian: It is optional for you to provide, if the nominee is minor.

1) I / We want the details of my / our nominee to be printed in the statement of holding or statement of account, provided to me/ us by the AMC / DP as follows; (please tick, as appropriate)
☐ Name of nominee(s)   ☐ Nomination: Yes / No

2) I hereby authorize ___________________(nominee number ___) to operate my account on my behalf, in case of my incapacitation in terms of paragraph 3.5 of the circular. He / She is authorized to encash my assets up to ___% of assets in the account / folio or Rs. _____________. (Optional)
(strike off portions that are not relevant)

3) This nomination shall supersede any prior nomination made by me / us, if any.

4) Signature(s) – As per the mode of holding in demat account(s) / MF folio(s)

FH	SH	TH
(First/Sole Holder Signature)	(Second Holder Signature)	(Third Holder Signature)

Note: In case of any correction in the form - Sign next to the correction done & Sign has to match the original signature

RIGHTS, ENTITLEMENT AND OBLIGATION OF THE INVESTOR AND NOMINEE:

1. If you are opening a new demat account / MF folios, you have to provide nomination. Otherwise, you have to follow procedure as per 3.10 of this circular.

2. You can make nomination or change nominee any number of times without any restriction.

3. You are entitiled to receive acknowledgment from the AMC / DP for each instance of providing or changing nomination.

4. Upon demise of the investor, the nominees shall have the option to either continue as joint holders with other nominees or for each nominee(s) to open separate single account / folio.

5. In case all your nominees do not claim the assets from the AMC / DP, then the residual unclaimed asset shall continue to be with the AMC in case of MF units and with the concerned Depository in case of Demat account.

6. You have the option to designate any one of your nominees to operate your account / folio, in case of your physical incapacitation, at any point of time and not just during opening of account / folio.
This mandate can be changed any time you choose.

7. The signatories for this nomination form shall be as per mode of holding in the folio(s) / demat account(s) i.e.
7.1 'Either or Survivor' Folios / Accounts - any one of the holder can sign
7.2 'First holder' Folios / Accounts - only First holder can sign
7.3 'Jointly' Folios / Accounts - all holders have to sign

TRANSMISSION ASPECTS

AMCs / DPs shall transmit the folio / account to the nominee(s) upon receipt of 1) copy of death certificate and 2) completion / updation of KYC of the nominee(s). The nomimee is not required to provide affidavits, indemnitites, undertakings, attestations or notarization.

In case of a joint account / folio, for transmission to the surviving joint holder(s) by name deletion, the surviving joint holder(s) shall have the option to update residential address(es), mobile number(s), email address(es), bank account detail(s), annual income and nominee(s), either along with transmission or at a later date. The regulated entity cannot seek KYC documents at the time of transmission, unless it was sought earlier but not provided by the holder.

Nominee(s) shall extend all possible co-operation to transfer the assets to the legal heir(s) of the deceased investor. In this regard, no dispute shall lie against the AMC / DP.

In case of multiple nomineees, the assets shall be distributed pro-rata to the surviving nominees, as illustrated below.

% share as specified by investor at the time of nomination		**% assets to be apportioned to surviving nominees upon demise of investor and nominee 'A'**			
Nominee	**% share**	**Nominee**	**% initial share**	**% of A's share to be apportioned**	**Total % share**
A	60%	A	0	0	0
B	30%	B	30%	45%	75%
C	10%	C	10%	15%	25%
Total	**100%**	**-**	**40%**	**60%**	**100%**

OFFICE USE ONLY

(To be filled by Depository Participant)

DP ID	12033200, 12033201, 12033202, 12033203 & 12033204	Client ID	

Nomination form accepted and registered vide Registration No.: ____

I / We have received and read the Rights and Obligations document and terms & conditions and agree to abide by and be bound by the same and by the Bye Laws as are in force from time to time. I / We declare that the particulars given by me/us above are true and to the best of my/our knowledge as on the date of making this application. I/We agree and undertake to intimate the DP any change(s) in the details / Particulars mentioned by me / us in this form. I/We further agree that any false / misleading information given by me / us or suppression of any material information will render my account liable for termination and suitable action.

Signature of the Authorised Signatory

Seal/Stamp of the Intermediary

ACKNOWLEDGMENT RECIEPT			
APPLICATION NO		Date	DD MM YY

We hereby acknowledge the receipt of the Account Opening and Nomination Application Form:
This nomination shall supersede any prior nomination made by the account holder (s), if any. -

Declaration Form for opting out of nomination
[Annexure B to SEBI circular No. SEBI/HO/MIRSD/RTAMB/CIR/P/2021/601 dated July 23, 2021 on Mandatory Nomination for Eligible Trading and Demat Accounts]

To

Date D D M M Y Y Y Y

Angel One Limited
601, 6th Floor, Ackruti Star, Central Road,
MIDC, Andheri East, Mumbai - 400093.

UCC/DP ID								
Client ID (only for Demat account)								
Sole/First Holder Name								
Second Holder Name								
Third Holder Name								

I / We hereby confirm that I / We do not wish to appoint any nominee(s) in my / our trading / demat account 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 / information for claiming of assets held in my / our trading / demat account, which may also include documents issued by Court or other such competent authority, based on the value of assets held in the trading / demat account.

Name and Signature of Holder(s)*

FH

(Account Holder Signature)

* Signature of witness, along with name and address are required, if the account holder affixes thumb impression, instead of signature

Name			
Address			
Signature			

DEMAT DEBIT AND PLEDGE INSTRUCTION -DDPI (VOLUNATRY) - NRE

DULY STAMPED

TO ALL TO WHOM THESE PRESENTS SHALL COME I/we ____, (name of the BO), Indian inhabitant/Non-resident SEND GREETINGS.

Whereas I/we hold a Beneficiary account no. __________________________(BO-ID) with Central Depository Services (India) Limited, with Angel One Ltd (a Depository Participant registered with CDSL) bearing DP-ID 12033200, 12033201, 12033202, 12033203 & 12033204
And Whereas I/we are registered as a client with Angel One Ltd (trading member of Bombay Stock Exchange Ltd., National Stock Exchange of India Ltd., Metropolitan Stock Exchange of India Ltd., National Commodity & Derivatives Exchange Ltd., and Multi Commodity Exchange of India Ltd for dealing in the securities market.

Dear Sir/Madam,
I/We executing the Demat Debit and Pledge instruction in favour of Angel One Ltd., authorising them to operate aforesaid beneficiary account for the below mentioned specific purpose.

S.No.	Purpose	Signature of First Holder	Signature of Second Holder	Signature of Third Holder
1	Transfer of securities held in the beneficial owner accounts of the client towards Stock Exchange related deliveries / settlement obligations arising out of trades executed by clients on the Stock Exchange through the same stock broker	Signature	Signature	Signature
2	Pledging / re-pledging of securities in favour of trading member (TM) / clearing member (CM) for the purpose of meeting margin requirements of the clients in connection with the trades executed by the clients on the Stock Exchange.	Signature	Signature	Signature
3	Mutual Fund transactions being executed on Stock Exchange order entry platforms	Signature	Signature	Signature
4	Tendering shares in open offers through Stock Exchange platforms	Signature	Signature	Signature

This authorization will continue to remain valid until revoked in writing by me/us. Such revocation or termination shall in no way affect the validity of this document (DDPI) with reference to any transactions initiated by me/us, prior to the actual receipt by the Attorney of the notice of such revocation or termination, as above.

I/We accept (For Angel One Ltd.)

Authorised Signature: ________________________ Date: ________________________

SCHEDULE 1 - LIST OF DEMAT ACCOUNTS

Depository Participant Name	Demat A/c No.	Exchange	Name / Type	Account Purpose	CMBPID
ANGEL ONE LIMITED	1203320006951435	NSE	CDSL - NSE POOL ACCOUNT	Payin & Payout Account	
ANGEL ONE LIMITED	1203320008188083	NSESLB	CDSL - SLBM POOL ACCOUNT	Payin & Payout Account	
ANGEL ONE LIMITED	1100001100017670	NSE	NSE EARLY PAY IN	Early Payin Account	
ANGEL ONE LIMITED	1100002300001190	NSESLB	SLBM EARLY PAY IN	Early Payin Account	
ANGEL ONE LIMITED	1203320186015090	NSE	CDSL Client Unpaid Securities Pledge Account	TM/CM CUSPA	
ICICI BANK LIMITED	IN30134820306643	NSE	NSDL Client Unpaid Securities Pledge Account	TM/CM CUSPA	
ANGEL ONE LIMITED	1203320030135829	NSE	CLIENT SECURITIES MARGIN FUNDING ACCOUNT	MFT Pledge Account	
ANGEL ONE LIMITED	1203320030135814	NSE	CLIENT SECURITIES MARGIN PLEDGE ACCOUNT	Margin Pledge Account	
ICICI BANK LIMITED	IN30134820707701	NSE	NSDL NSE POOL ACCOUNT	Payin & Payout Account	IN590341
HDFC BANK	IN30012610003588	BSE	NSDL BSE POOL ACCOUNT	Payout Account	IN606125
ANGEL ONE LIMITED	1203320000006564	BSE	CDSL BSE POOL ACCOUNT	Payout Account	
ANGEL ONE LIMITED	1203320000006579	BSE	CDSL BSE PRINCIPAL ACCOUNT	Payin Account	
ANGEL ONE LIMITED	1100001000014641	BSE	BSE EARLY PAY IN	Early Payin Account	

DEMAT DEBIT AND PLEDGE INSTRUCTION -DDPI (VOLUNATRY) - NRO

DULY STAMPED

TO ALL TO WHOM THESE PRESENTS SHALL COME I/we ____, (name of the BO), Indian inhabitant/Non-resident SEND GREETINGS.

Whereas I/we hold a Beneficiary account no. __________________________(BO-ID) with Central Depository Services (India) Limited, with Angel One Ltd (a Depository Participant registered with CDSL) bearing DP-ID 12033200, 12033201, 12033202, 12033203 & 12033204

And Whereas I/we are registered as a client with Angel One Ltd (trading member of Bombay Stock Exchange Ltd., National Stock Exchange of India Ltd., Metropolitan Stock Exchange of India Ltd., National Commodity & Derivatives Exchange Ltd., and Multi Commodity Exchange of India Ltd for dealing in the securities market.

Dear Sir/Madam,

I/We executing the Demat Debit and Pledge instruction in favour of Angel One Ltd., authorising them to operate aforesaid beneficiary account for the below mentioned specific purpose.

S.No.	Purpose	Signature of First Holder	Signature of Second Holder	Signature of Third Holder
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2	Pledging / re-pledging of securities in favour of trading member (TM) / clearing member (CM) for the purpose of meeting margin requirements of the clients in connection with the trades executed by the clients on the Stock Exchange.	Signature	Signature	Signature
3	Mutual Fund transactions being executed on Stock Exchange order entry platforms	Signature	Signature	Signature
4	Tendering shares in open offers through Stock Exchange platforms	Signature	Signature	Signature

This authorization will continue to remain valid until revoked in writing by me/us. Such revocation or termination shall in no way affect the validity of this document (DDPI) with reference to any transactions initiated by me/us, prior to the actual receipt by the Attorney of the notice of such revocation or termination, as above.

I/We accept (For Angel One Ltd.)

Authorised Signature: ________________________ Date: ________________________

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ANGEL ONE LIMITED	1100002300001190	NSESLB	SLBM EARLY PAY IN	Early Payin Account	
ANGEL ONE LIMITED	1203320186015090	NSE	CDSL Client Unpaid Securities Pledge Account	TM/CM CUSPA	
ICICI BANK LIMITED	IN30134820306643	NSE	NSDL Client Unpaid Securities Pledge Account	TM/CM CUSPA	
ANGEL ONE LIMITED	1203320030135829	NSE	CLIENT SECURITIES MARGIN FUNDING ACCOUNT	MFT Pledge Account	
ANGEL ONE LIMITED	1203320030135814	NSE	CLIENT SECURITIES MARGIN PLEDGE ACCOUNT	Margin Pledge Account	
ICICI BANK LIMITED	IN30134820707701	NSE	NSDL NSE POOL ACCOUNT	Payin & Payout Account	IN590341
HDFC BANK	IN30012610003588	BSE	NSDL BSE POOL ACCOUNT	Payout Account	IN606125
ANGEL ONE LIMITED	1203320000006564	BSE	CDSL BSE POOL ACCOUNT	Payout Account	
ANGEL ONE LIMITED	1203320000006579	BSE	CDSL BSE PRINCIPAL ACCOUNT	Payin Account	
ANGEL ONE LIMITED	1100001000014641	BSE	BSE EARLY PAY IN	Early Payin Account	

DEMAT DEBIT AND PLEDGE INSTRUCTION -DDPI (VOLUNATRY) - FNC (Foreign National)

DULY STAMPED

TO ALL TO WHOM THESE PRESENTS SHALL COME I/we ____, (name of the BO), Indian inhabitant/Non-resident SEND GREETINGS.

Whereas I/we hold a Beneficiary account no. __________________________ (BO-ID) with Central Depository Services (India) Limited, with Angel One Ltd (a Depository Participant registered with CDSL) bearing DP-ID 12033200, 12033201, 12033202, 12033203 & 12033204
And Whereas I/we are registered as a client with Angel One Ltd (trading member of Bombay Stock Exchange Ltd., National Stock Exchange of India Ltd., Metropolitan Stock Exchange of India Ltd., National Commodity & Derivatives Exchange Ltd., and Multi Commodity Exchange of India Ltd for dealing in the securities market.

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I/We accept (For Angel One Ltd.)

Authorised Signature: ________________________ Date: ________________________

SCHEDULE 1 - LIST OF DEMAT ACCOUNTS

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HDFC BANK	IN30012610003588	BSE	NSDL BSE POOL ACCOUNT	Payout Account	IN606125
ANGEL ONE LIMITED	1203320000006564	BSE	CDSL BSE POOL ACCOUNT	Payout Account	
ANGEL ONE LIMITED	1203320000006579	BSE	CDSL BSE PRINCIPAL ACCOUNT	Payin Account	
ANGEL ONE LIMITED	1100001000014641	BSE	BSE EARLY PAY IN	Early Payin Account	

FATCA / CRS DECLARATION / SELF CERTIFICATION FOR INDIVIDUAL

	First Holder	Second Holder	Third Holder
Client Code:			
Demat Account No.			
1. Indicate (✓) your Tax Residency / Citizenship / Nationality	☐ India ☐ U.S.A ☐ Others	☐ India ☐ U.S.A ☐ Others	☐ India ☐ U.S.A ☐ Others
If ticked on "Others" and/or "U.S.A", please provide all details under point no. 2,3,4,5 below:			
2. Specify City and Country of Birth			
3. Specify Country(ies) of Tax Residency/ Citizenship / Nationality / Green card holder, other than India			
4. Tax Identification Number (for U.S.A.) or its functional equivalent (other than U.S.A.)			
5. Source of Wealth	☐ Salary ☐ Business ☐ Gift ☐ Rental Income ☐ Royalty ☐ Ancestral Property ☐ Prize Money ☐ Others	☐ Salary ☐ Business ☐ Gift ☐ Rental Income ☐ Royalty ☐ Ancestral Property ☐ Prize Money ☐ Others	☐ Salary ☐ Business ☐ Gift ☐ Rental Income ☐ Royalty ☐ Ancestral Property ☐ Prize Money ☐ Others

DECLARATION

I / We hereby declare, agree and confirm the following:

a) The details furnished above are true to the best of my knowledge and belief and shall undertake to inform Angel One Limited within 30 days, in case of any change in the above given status on a future date;

b) If I /we am/are U.S. person or tax resident of a reportable foreign jurisdiction (other than U.S.), my account details, would be reported by Angel One Limited to the relevant tax authority, or information may be shared with concerned Asset Management Companies (AMCs) or such other product providers, to whom FATCA/ CRS norms are applicable or to any of the Government Agencies / Tax authorities / Regulators / Exchanges / Depositories of India or of any country other than India;

c) If my / our Country of Birth is US, however, I / We declare that I/ We are not US Person, I / We shall provide a certificate of relinquishment of citizenship (Loss of nationality) OR a self certification stating reasons for not having such a certificate despite relinquishing US citizenship OR not obtaining US citizenship at birth.

d) I/We understand that Angel One Limited is relying on this information for the purpose of determining the status of the applicant named above in compliance with FATCA/CRS. Angel One Limited is not able to offer any tax advice on CRS or FATCA or its impact on the applicant. I/we shall seek advice from professional tax advisor for any tax questions.

e) I/We agree that as may be required by domestic regulators/tax authorities that Angel One Limited may also be required to report, reportable details to CBDT or close or suspend my account.

f) I/We certify that I/we provide the information on this form and to the best of my/our knowledge and belief the certification is true, correct, and complete including the taxpayer identification number of the applicant, or its functional equivalent.

FH	FH	FH
(First Holder Signature)	(Second Holder Signature)	(Third Holder Signature)

What is FATCA / CRS?

The U.S. government introduced the Foreign Account Tax Compliance Act, 2010 (FATCA) for obtaining information on accounts held by U.S. taxpayers in other countries. Further, Organization for Economic Co-operation & Development (OECD) and G20 countries agreed for automatic exchange on information through Common Reporting Standards (CRS). The Government of India has signed an Inter-Government Agreement (IGA) with US and has also joined the Multilateral Competent Authority agreement (MCAA) for automatic sharing of information with member countries of OECD and G20. By virtue of India signing an IGA with US and joining MCAA, Indian financial institutions will have to provide the required financial information to Indian tax authorities which in turn would forward reportable information to US IRS and member countries of OECD and G20 countries.

In order to implement FATCA and CRS norms in India, Angel One Limited is required to implement procedures to identify U.S. account holders or other jurisdictions reportable accounts, perform due diligence and obtain documentary evidence wherever required and report details of such accounts to relevant tax authority.

US Person means: In case of individuals, U.S. person means a citizen or resident of the United States. Persons who would qualify as U.S. persons could be born in United States, born outside the United States of a US parent, Naturalized citizens, Green Card Holders, tax residents.

Who is Reportable Person (Non US) under Common Reportable Standards (CRS)?
Under Common Reportable Standards (CRS), reportable person means Tax residents of a reportable foreign jurisdiction other than U.S. (Please note the above information is provided only for quick reference to customers. You are requested to consult a legal/ tax advisor if in doubt.

Documents to be collected if Customer's Country of birth is U.S. but declare that he/ she are not a U.S. person 1. Certificate of relinquishment of citizenship (Loss of nationality certificate); OR 2. Self certification for stating reasons for not having such a certificate despite relinquishment U.S. citizenship; OR 3. Self certification for stating reasons for not obtaining U.S. citizenship at birth.

DECLARATION BY NRI CLIENTS

Date : ________________________

To,
Angel One Ltd
601, 6th Floor, Ackruti Star, Central Road,
MIDC, Andheri East, Mumbai - 400093.

With reference to the opening of trading Account with you for availing facility for trading in Securities on the stock exchanges pursuant to the Regulatory guidelines of stock exchanges / Depository & other voluntary documents executed by me with you, I, hereby unconditionally & unequivocally, state, declare, undertake, confirm Angel One Ltd (hereinafter referred to as "ANGEL") as under:

1. "I/We also declare that I/we have complied and will continue to comply with FEMA & other applicable regulations from time to time, with respect to buying and selling of securities in the Indian Capital Market"

2. I am nonresident Indian / Person of Indian Origin as defined under Foreign Exchange Management Act (FEMA) and presently visiting India (strike out if not applicable).

3. I understand that the trading account is opened on the basis of statement / declarations made by me, and that if any of the statement / declarations made herein is found to be incorrect in material particulars, ANGEL may discontinue my trading account.

4. I confirm and agree that the trading account will be used for bona fide transactions not involving any violation of the provisions of any applicable Regulations.

5. I undertake to intimate to ANGEL about my return to India for permanent residency immediately on arrival.

6. I confirm that all Investments & disinvestment in India are covered either by general or special permission of Reserve Bank of India.

7. In case of F & O, I shall keep margin deposit amount with ________________________ as stipulated by ANGEL from time to time.

8. I understand that as NRI I am not allowed to do any off market transfer of my holding's to a person other than my relative as defined in section 2 (77) of Indian Companies Act, 2013.

9. Any notice / correspondence / contract notes / statement of accounts / statement of securities sent to me at any of the address given in the Know Your Client (KYC) form in the ordinary course of post / courier / fax or on the email ID mentioned in the said KYC form or intimated separately, as the case may be, for the purpose of receiving electronic contract notes shall be deemed to have been received by me.

10. I hereby confirm having understood that ANGEL may decline to comply with any instructions authorized by me if in the ANGEL's opinion; compliance therewith would be illegal or result in a breach of any applicable laws or regulation.

11. I confirm that the bank having my PIS account is given standing instruction to honor all the contract notes relating to purchase trades received from ANGEL. Copy of the instruction so given to the bank shall be provided to ANGEL for their record.

12. I agree and confirm that in the event I desire to withdraw the standing instruction given as aforesaid, I shall serve at least 15 (Fifteen) working days advance written notice on ANGEL. Such revocation shall be effective only on and from the date of expiry of 15 (Fifteen) working days from the date of service of such notice on ANGEL provided that such revocation shall not have any effect on the transactions in securities executed by me before the effective date of such notice of revocation and I agree and undertake that I shall continue to be liable and bound by the transactions and obligations undertaken by me with ANGEL prior to effective date of such revocation and ensure that bank honor all such instructions received from ANGEL on or before the effective date of revocation.

13. I shall carry out all our secondary market transactions only through ANGEL. In case if I register myself as clients with any other Member Broker, we shall keep ANGEL informed about the same.

14. I hereby authorize ANGEL to ask bank the amount lying as balance in PIS account on daily basis for the purpose of their risk management and I confirm having instructed the bank to extend co-operation in this regard and to disclose balance in the PIS bank account to ANGEL whenever required by ANGEL.

15. I hereby agree and confirm to indemnify and save, defend and keep ANGEL harmless and indemnified, at all times from and against all actions, causes, suits, proceedings, claims and demands whatsoever made on the ANGEL by any person and against all costs charges, expenses, damages and sums of money (including legal expenses) incurred, suffered or sustained by ANGEL for any non compliance of applicable act, rules or regulations by me or due to breach of the terms and conditions of my obligations under Rights and Obligations or any other agreement/document executed by me for availing such services from ANGEL.

16. I agree not to close the bank account without first obtaining No Objection from ANGEL if I am availing the online trading facility for trading

in securities. We confirmed having authorised the Bank to reject any such closure request made by me if not accompanied by No Objection issued by ANGEL. I confirm having authorised the Bank to debit / block my bank account on the instructions issued by ANGEL for any dues that may be outstanding and payable by me to ANGEL for the transactions carried out by me prior to issuance of No Objection.

17. I further, unconditionally state and declare that, I have and shall continue to comply with all applicable Acts, Rules, Regulations etc. in the country / state / area where I am currently residing as well as all statutory and regulatory provisions enforced in India including but not limited to Foreign Exchange Management Act, 2000, Reserve Bank of India Act, 1934 and Securities and Exchange Board of India Act, 1992 for trading on Exchanges, subscription of shares through Initial Public Offerings, Investment in Mutual Funds registered in India etc.

18. I am aware that as per the RBI guidelines the Non-Resident Indians (NRI's) and Persons of Indian Origin (PIO's) are allowed to invest in the secondary capital markets in India through the portfolio Investment Scheme (PIS). Under this scheme, NRI's / PIO's can acquire shares / debentures of Indian Companies through the stock exchanges in India. These investments are governed and monitored on daily basis by the Reserve Bank of India (RBI). On reaching the aggregate ceiling limit as fixed by RBI from time to time, the RBI advises all designated bank branches to stop purchases on behalf of their NRI / PIO clients. The Reserve Bank also informs the general public about the 'caution' and the 'stop purchase' in these companies through a press release. I hereby acknowledge that I am aware of the RBI guidelines in relation to investments in the secondary market in India. I hereby agree to keep myself abreast of the ceiling limits on investments as published by RBI from time to time and also agree that I shall immediately reverse my transaction, if such transaction breaches the ceiling limits as imposed by RBI. In case I am unable to reverse such transaction immediately, I authorise the member to do so under intimation to the Client.

19. I confirm that the information set out here in above is true, complete & accurate & ANGEL shall be informed from time to time of any changes.

20. I shall comply with all trading restrictions and not deal in the restricted stocks in the Indian capital market, or otherwise, as specified by Reserve Bank of India ("RBI"), from time to time.

21. I hereby authorize AOL to disclose, share, rely, remit in any form, mode or manner, all / any of the information provided by me, including all changes, updates to such information as and when provided by me, to any Indian or foreign governmental or statutory or judicial authorities / agencies including but not limited to the Financial Intelligence Unit-India (FIU-IND), the tax / revenue authorities in India or outside India wherever it is legally required and other investigation agencies without any obligation of notifying me or obtaining my consent. This undertaking shall act as an instrument of my explicit consent and survive the termination of this undertaking or closure of my Demat Account as the case maybe.

22. I declare that I do not reside in the jurisdiction classified in the black-list or grey-list by the Financial Action Task Force and accessible at https://www.fatf-gafi.org/en/countries/black-and-grey-lists.html and in the event, due to any reasons whatsoever, if I reside in the jurisdiction classified in the grey-list by the Financial Action Task Force and accessible at https://www.fatf-gafi.org/en/countries/black-and-grey-lists.html, I shall seek express approval of AOL for account opening. Notwithstanding anything to the contrary contained hereinabove, in the event if I reside in the black-list jurisdiction, AOL shall reserve a right to forthwith terminate my Demat Account.

23. I declare that, I have not been solicited in any form, whatsoever by AOL to avail the services offered by them and have approached AOL independently to avail their services.

24. I do not reside in the jurisdiction, where availing and/or soliciting any service from AOL is unlawful.

UNDERTAKING

To,

Date: _____________

Angel One Ltd

601, 6th Floor, Ackruti Star, Central Road,
MIDC, Andheri East, Mumbai - 400093.

This is with reference to my passport number_________________________submitted as an identity and address proof which was issued on_____________________and having an expiry date______________________.

I hereby undertake that the above passport is the only passport that I hold in my name.

Or*

I hereby undertake that the following passports are held by me :

Sr. No.	Place of issue (country)	Passport Number	Date of Issue	Date of Expiry

*strike of the option which is not applicable

Thanking you

Yours sincerely,

Name: ____

FH

(Account Holder Signature)

Note: In case of any correction in the form - Sign next to the correction done & Sign has to match the original signature

DECLARATION FOR USING COMMON EMAIL ID & MOBILE NO. FOR TRADING & DEMAT A/C

Date:___________

To,
Angel One Ltd.
601, 6th Floor, Ackruti Star,
Central Road, MIDC, Andheri East,
Mumbai - 400093.

Client Code: ______________ Demat Account number: ____________________________________

Client Name:____

I hereby declare following details:

Mobile No: _______________ ________________ _the number belongs to ______________________________________

☐ Self ☐ Spouse ☐ Dependent Children ☐ Dependent Parents ☐ Authorised Signatory (non-individual category)

Email Id: _______________ ___________________ the email Id belongs to _____________________________ _______

☐ Self ☐ Spouse ☐ Dependent Children ☐ Dependent Parents ☐ Authorised Signatory (non-individual category)

Signature of related person: ____

Note:

1. As per SEBI Circular No. CIR/MIRSD/15/2011 dated August 02, 2011 investor will receive SMS & Email alerts on the given Mobile No. & Email Id.
2. As per the regulatory guidelines, use of common email id and mobile number is permissible for Family members which includes Self, Spouse, Dependent Parents and Dependent Children. For Non-individual client category the permissible relationship can be of Authorised signatory. Family Flag is required to be updated as 'Y' in all such Demat Accounts
3. Client may please note that Mobile No and/or email ID of Trading Member (TM) / Employees of TM/Authorised Person are not permitted to receive the SMS / Email Communication from Exchanges on behalf of client.
4. Valid Email Id & Mobile Number is mandatory for all New as well as Existing Clients. In case of repetitive bounce observation, member reserves right to suspend the account for want of valid KYC details.

FH

(1st Authorized Signatory)

SH

(2nd Authorized Signatory)

TH

(3rd Authorized Signatory)

ANNEXURE A

INVESTOR CHARTER IN RESPECT OF RAs

A. Vision and Mission Statements for investors

Vision
Invest with knowledge & safety.

Mission
Every investor should be able to invest in right investment products based on their needs, manage and monitor them to meet their goals, access reports and enjoy financial wellness.

B.Details of business transacted by the Research Analyst with respect to the investors

To publish research report based on the research activities of the RA

To provide an independent unbiased view on securities.

To offer unbiased recommendation, disclosing the financial interests in recommended securities.

To provide research recommendation, based on analysis of publicly available information and known observations.

To conduct audit annually

To ensure that all advertisements are in adherence to the provisions of the Advertisement Code for Research Analysts.

To maintain records of interactions, with all clients including prospective clients(prior to onboarding), where any conversation related to the research services has taken place.

C. Details of services provided to investors(No Indicative Timelines)

Onboarding of Clients

Sharing of terms and conditions of research services
Completing KYC of fee paying clients

• Disclosure to Clients:

To disclose, information that is material for the client to make an informed decision, including details of its business activity, disciplinary history, the terms and conditions of research services, details of associates, risks and conflicts of interest, if any

To disclose the extent of use of Artificial Intelligence tools in providing research services

To disclose, while distributing a third party research report, any material conflict of interest of such third party research provider or provide web address that directs a recipient to the relevant disclosures

To disclose any conflict of interest of the activities of providing research services with other activities of the research analyst.

To distribute research reports and recommendations to the clients without discrimination.

To maintain confidentiality w.r.t publication of the research report until made available in the public domain.

To respect data privacy rights of clients and take measures to protect unauthorized use of their confidential information

To disclose the timelines for the services provided by the research analyst to clients and ensure adherence to the said timelines

To provide clear guidance and adequate caution notice to clients when providing recommendations for dealing in complex and high-risk financial products/services

To treat all clients with honesty and integrity
To ensure confidentiality of information shared by clients unless such information is required to be provided in furtherance of discharging legal obligations or a client has provided specific consent to share such information.

D. Details of grievance redressal mechanism and how to access it
1. Investor can lodge complaint/grievance against Research Analyst in the following ways:

Mode of filing the complaint with research analyst

In case of any grievance / complaint, an investor may approach the concerned Research Analyst who shall strive to redress the grievance immediately, but not

later than 21 days of the receipt of the grievance.

Mode of filing the complaint on SCORES or with Research Analyst Administration and Supervisory Body(RAASB)

i. SCORES 2.0(a web based centralized grievance redressal system of SEBI for facilitating effective grievance redressal in time-bound manner)(https://scores.sebi.gov.in)

Two level review for complaint/grievance against Research Analyst:

First review done by designated body(RAASB)
Second review done by SEBI

ii. Email to designated email ID of RAASB

2. If the Investor is not satisfied with the resolution provided by the Market Participants, then the Investor has the option to file the complaint/ grievance on SMARTODR platform for its resolution through online conciliation or arbitration.

With regard to physical complaints, investors may send their complaints to:

Office of Investor Assistance and Education,
Securities and Exchange Board of India, SEBI Bhavan,
Plot No. C4-A, 'G' Block, Bandra-Kurla Complex,
Bandra(E), Mumbai - 400 051

E. Rights of investors

Right to Privacy and Confidentiality

Right to Transparent Practices

Right to fair and Equitable Treatment

Right to Adequate Information

Right to Initial and Continuing Disclosure

-Right to receive information about all the statutory and regulatory disclosures

Right to Fair & True Advertisement

Right to Awareness about Service Parameters and Turnaround Times

Right to be informed of the timelines for each service

Right to be Heard and Satisfactory Grievance Redressal

Right to have timely redressal

Right to Exit from Financial product or service in accordance with the terms and conditions agreed with the research analyst

Right to receive clear guidance and caution notice when dealing in Complex and High-Risk Financial Products and Services

Additional Rights to vulnerable consumers
- Right to get access to services in a suitable manner even if differently abled

Right to provide feedback on the financial products and services used
Right against coercive, unfair, and one-sided clauses in financial agreements

F. Expectations from the investors(Responsibilities of investors)

Do's

i. Always deal with SEBI registered Research Analyst.

ii. Ensure that the Research Analyst has a valid registration certificate.

iii. Check for SEBI registration number.
Please refer to the list of all SEBI registered Research Analyst which is available on SEBI website in the following link: https://www.sebi.gov.in/sebiweb/other/OtherAction.do?doRecognisedFpi=yes&intmId=14)

iv. Always pay attention towards disclosures made in the research reports before investing.

v. Pay your Research Analyst through banking channels only and maintain duly signed receipts mentioning the details of your payments. You may make payment of fees through Centralized Fee Collection Mechanism(CeFCoM) of RAASB if research analyst has opted for the mechanism.(Applicable for fee paying clients only)

vi. Before buying/ selling securities or applying in public offer, check for the research recommendation provided by your Research Analyst.

vii. Ask all relevant questions and clear your doubts with your Research Analyst before acting on recommendation.

viii. Seek clarifications and guidance on research recommendations from your Research Analyst, especially if it involves complex and high risk financial products and services.

ix. Always be aware that you have the right to stop availing the service of a Research Analyst as per the terms of service agreed between you and your Research Analyst.

x. Always be aware that you have the right to provide feedback to your Research Analyst in respect of the services received.

xi. Always be aware that you will not be bound by any clause, prescribed by the research analyst, which is contravening any regulatory provisions.

xii. Inform SEBI about Research Analyst offering assured or guaranteed returns.

Don’ts

i. Do not provide funds for investment to the Research Analyst.

ii. Don’t fall prey to luring advertisements or market rumors.

iii. Do not get attracted to limited period discount or other incentive, gifts, etc. offered by Research Analyst.

iv. Do not share login credential and password of your trading, demat or bank accounts with the Research Analyst.

Registered / Corporate Office: 601, 6th Floor, Ackruti Star, Central Road, MIDC, Andheri East, Mumbai - 400093.
Tel.: 18001020 Website: www.angelone.in CIN: U67120MH1996PTC101709
Member: Bombay Stock Exchange Ltd. / National Stock Exchange of India Ltd./ Metropolitan Stock Exchange of India Ltd. / Multi Commodity Exchange of India Ltd. / National Commodity & Derivatives Exchange Ltd. / CDSL-Depository Participant

SEBI Registration No.: INZ000161534

BSE & NSE Cash Segment
TM Code - BSE 612 TM Code - NSE 12798

BSE & NSE Commodities Derivative Segment
TM Code - BSE 612 TM Code - NSE 12798

BSE & NSE F&O Segment (Trading Cum Clearing Member)
TM Code - BSE 612 TM Code - NSE 12798

NSE Currency Derivatives Segment (Trading cum Clearing Member)
TM Code - NSE Currency 12798

BSE Currency Derivatives Segment (Trading Cum Clearing Member)
TM Code - 612

Multi Commodity Exchange of India Ltd. (Trading cum Clearing Member)
TM Code - 12685

National Commodity & Derivatives Exchange Ltd. (Trading cum Clearing Member)
TM Code - 00220

NSE SLBM segment (Trading Cum Clearing Member)
TM Code 12798

CDSL-Depository Participant - SEBI Registration No.: IN-DP-CDSL-234-2004 Date: 12/5/2004
CDSL DP ID: 12033200, 12033201, 12033202, 12033203 & 12033204

For any grievance/dispute please contact Angel One Limited at the above address or email id: support@angelone.in and Phone No.:18001020. In case not satisfied with the response, please contact the concerned exchange (s):
BSE Email: is@bseindia.com & Tel.: (022) 2272 8097 | NSE Email: ignse@nse.co.in & Tel.: (022) 2659 8190 | MCX Email: customersupport@mcxindia.com & Tel No: (022) 6731 8888 | NCDEX Email: askus@ncdex.com & Tel No: (022) 6640 6899

Compliance Officer Name: Mr. Pranav Tanna. Tel.: 91 22 18001020. Email ID: compliance@angelbroking.com
CMD Name: Mr. Dinesh Thakkar - 08657864229 . Email ID: support@angelone.in
Also refer our website: www.angelone.in for updated details, if any.

For details: Please contact your nearest branch or call Centralized Helpdesk at: 18001020
or write to support@angelone.in