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First Applicant / Guardian					Indian	U.S.	Othe	rs	
Second Applicant					Indian	U.S.	Othe	rs	
Third Applicant					Indian	U.S.	Othe	rs	
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For Non Individual investors Annexure I and Annexure II are available on the website of AMC i.e. www.axismf.com or at the Investor Service Centres (ISCs) of Axis Mutual Fund

3.	NOMINATION DETAILS (Mandatory) (R	lefer Instruction No.	18)					
Sr. No.	Nominee Name	PAN	Alloca (%	tion Relationship with Investor	Nominee date of birth		<b>Fuardian</b> Name ase of Minor)	Guardian Signature
1					D D M M Y Y			
2					D D M M Y Y			
3					D D M M Y Y			
	I/We DO NOT wish to nominate a	nd sign here	You/ Sc	le Applicant	Second Applico	int	Third Ap	oplicant

4. INVESTMENT DETAILS (For multiple schemes ref instruction no. 22) (Investors applying under Direct Plan must select "DIRECT" against scheme name, Refer Instruction No. 2.)

Sr. No.	Scheme Name	Plan	Option [Growth/*IDCW (Dividend) Option]	Amount
1		Regular Direct		
2		Regular Direct		
3		Regular Direct		

\*The dividend amounts can be distributed out of investors capital (Equalization Reserve), which is part of sale price that represents realized gains.

#### 5. PAYMENT DETAILS

Non-Third Party Payment Third Party Payment (Ple	ease attach 'Third Party Payment Declaratio	n Form')
Mode Cheque DD Axis Bank Debit Mandate (Please fill section 9.)	Date D D M M Y Y	Y     Cheque / DD No.
Amount (in figures) (in words)		
Pay-in A/c No.		
Account type Savings Current NRE	NRO FCNR Others	Specify
IFSC code (11 digit)	MICR Code (9 digit)	
Drawn on bank / branch name & address		

### 6. DEMAT ACCOUNT DETAILS (OPTIONAL)

(Please ensure that the sequence of names as mentioned in the application form matches with that of the A/c held with the depository participant) Refer Instruction No. 19.

	Depository Participant Name	DP ID: I N
NSDL:	Beneficiary A/c No.	
CDSL:	Depository Participant Name	
	Beneficiary A/c No.	
Enclos	ed Client Master	Transaction / Statement Copy / DIS Copy

#### 7. DECLARATION AND SIGNATURE

Having read and understood the content of the SID / KIM of the scheme and SAI of the Axis Mutual Fund (The Fund), I/we hereby apply for units of the scheme. I have read and understood the terms, conditions, details, rules and regulations governing the scheme. I/We hereby declare that the amount invested in the scheme is through legitimate source only and does not involve designed for the purpose of the contravention of any Act, Rules, Regulations, Notifications or Directives of the provisions of the Income Tax Act, Anti Money Laundering Laws, Anti Corruption Laws or any other applicable laws enacted by the Government of India from time to time. I/we have not received nor have been induced by any rebate or gifts, directly or indirectly in making this investment. I/We confirm that the funds invested in the Scheme, legally belongs to me/us. In event "Know Your Customer" process is not completed by me/us to the satisfaction of the Mutual Fund, (I/we hereby authorize the Mutual Fund, to redeem the funds invested in the Scheme, in favour of the applicant, at the applicable NAV prevailing on the date of such redemption and undertake such other action with such funds that may be required by the law.) The ARN holder has disclosed to me/us all the commissions (trail commission or any other mode), payable to him for the different competing Schemes of various Mutual Funds amongst which the Scheme is being recommended to me/ us. I / we give my / our consent to collect personal data or information as prescribed in the privacy policy which is available on the website of the AMC / Fund. I/We hereby give consent to the Company or its Authorized Agents and third party service providers to use information contained herein to its affiliates/group companies or their Authorized Agents or Third Party Service Providers in order to provide information and updates to me on various financial and investment products and offering of other services. I/We agree that all personal or transactional related information completed by me can be sha

I/We confirm that I/We do not have any existing Micro SIP/Lumpsum investments which together with the current application will result in aggregate investments exceeding ₹ 50,000 in a year (Applicable for Micro investment only.) with your fund house. For NRIs only - I / We confirm that I am/ we are Non Residents of Indian nationality/origin and that I/We have remitted funds from abroad through approved banking channels or from funds in my/ our Non Resident External / Non Resident Ordinary / FCNR account. I/We confirm that details provided by me/us are true and correct.

I/We give my consent to Axis Asset Management Company Limited and its agents to contact me over phone, SMS, email or any other mode to address my investment related queries and/or receive communication pertaining to transactions/ non-commercial transactions/ promotional/ potential investments and other communication/ material irrespective of my blocking preferences with the Customer Preference Registration Facility.

I/ We hereby provide my/our consent in accordance with Aadhaar Act, 2016 and regulations made thereunder, for (i) collecting, storing and usage (ii) validating/authenticating and (ii) updating my/ our Aadhaar number(s) (if provided) in accordance with the Aadhaar Act, 2016 (and regulations made thereunder) and PMLA. I/ We hereby provide my/our consent for sharing/disclosing of the Aadhaar number(s) including demographic information with the asset management companies of SEBI registered mutual fund (s) and their Registrar and Transfer Agent (RTA) for the purpose of updating the same in my/our folios with my PAN.

CERTIFICATION: I / We have understood the information requirements of this Form (read along with the FATCA & CRS Instructions) and hereby confirm that the information provided by me/us on this Form is true, correct, and complete. I / We also confirm that I / We have read and understood the FATCA & CRS Terms and Conditions below and hereby accept the same.

You/ Sole Applicant /Guardian	Second Applicant	Third Applicant	Power of Attorney Holder
Date D D M M Y Y Y	Place		

## 8. QUICK CHECKLIST

KYC acknowledgement letter (Compulsory for MICRO Investments)
Self attested PAN card copy
Plan / Option / Sub Option name mentioned in addition to scheme name
Multiple Bank Accounts Registration form (if you want to register multiple bank accounts so that future payments can be made from any of the accounts)
Email id and mobile number provided for online transaction facility
SIP Registration Form for SIP investments
Relationship proof between guardian and minor (if application is in the name of a minor)
FATCA Declaration

Additional documents attached for Third Party payments. Refer instruction No. 7.



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		y don't have to issue a cheque if you hold an Avis Bank Account). To be processed in	
We	Name of f	he account holder(s)	Application No.
uthorise you to debit my/our account no.			
ccount type Savings NRO		urrent FCNR Others Specify	to pay for the purchase of
Axis Bluechip Fund Axis Long Te	rm Equity Fund	Axis Regular Saver Fund Axis Triple Advantage Fu	nd 🗌 Axis Midcap Fund
Axis Focused 25 Fund Axis Arbitr	age Fund	Axis Equity Saver Fund Axis Flexi Cap Fund Axis	Dynamic Equity Fund
Axis Equity Hybrid Fund Axis Gro	wth Opportuni	ties Fund 📃 Axis Small Cap Fund 🗌 Axis ESG Equity Fur	d 🗌 Axis Nifty 100 Index Fund
Axis Special Situations Fund	is Global Equity	y Alpha Fund Of Fund OR Axis MF Multiple Schemes	
nount 1 words)	(in Figures)		
Signature of First Account Holder		Signature of Second Account Holder	Signature of Third Holder
ate D D M M Y Y Y Y	]		

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

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Cheque No.	Date	Amount	Scheme	Stamp & Signature

Application No.

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for first tim	e investors, si	ıbmit Commo	n Annlicati	ion form al	ong with	this form

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2. SIP DETAILS			SIP Registration N	lode A-OTM	K-OTM Mandate along with SIP form
OTM Reference No.					(if Multiple One Time Mandate are registered)
Scheme / Plan / Option	Frequency	SIP Date (DD)	Enrollment Period	SIP Amount	(Optional) Only available for Monthly SIP
		(88)	(/***(11)		Frequency Amount
	Monthly	F	From	₹ in figures	Half Yearly ₹ in figures
	Yearly	Default T	Fo		Yearly
		SIP Date 7th		in words	in words
		c	or 1299		Dynamic TOP-UP
	Monthly	F	From	₹ in figures	Half Yearly ₹ in figures
	Yearly	Default T	 ۲۰		Yearly
		SIP Date 7th		in words	in words
		c	or 1299		Dynamic TOP-UP
	Monthly	F	rom	₹ in figures	Half Yearly ₹ in figures
	Yearly	Default T	ſo		Yearly
		SIP Date 7th		in words	in words
		c	or 1299		Dynamic TOP-UP
SIP initial payment details (Optional	)				
Drawn on bank / branch name				Amou	nt
Mode Cheque/DD Cheque	/DD		Dat	ed D D M M Y	Y Y Y

In case of multiple SIP, mention "Axis MF Multiple Schemes" on the payment instrument.

#### 3. Declaration and Signature (to be signed by all unit holders if mode of holding is 'joint')

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

You/ Sole Applicant /Guardian

Second Applicant

Third Applicant

## **INSTRUCTIONS FOR SIP & TOP-UP**

- Multiple Investments facility is not available for Axis Children's Gift Fund, Axis Liquid Fund, 1. Axis Overnight Fund, All ETF Schemes, any closed ended schemes and during NFO period.
- Investors are required to submit Form along with a photo copy/cancelled cheque of Debit Bank Account at least 21 days before the first SIP Installment date. 2
- Investor shall have the option of choosing any date of the month as the SIP date except the dates 29th, 30th and 31st. If SIP date is not mentioned, default date would be considered as 3 7th of every month. If the SIP date falls on a non-business day or a bank holiday, the SIP debit will be processed on the following business day.

4 Please refer below table for minimum monthly/yearly installments Scheme Monthly Yearly Minimum Amount (₹) Minimum Amount (₹) Installments Minimum Installments All Schemes except below schemes, Axis Overnight Fund & Axis Liquid Fund 1000 6 Axis Bluechip Fund, Axis Midcap Fund, Axis Flexi Cap Fund, Axis Smallcap Fund, Axis Focused 25 Fund & Axis Nifty 100 Index Fund 500 6 12000 3 Axis Long Term Equity Fund\* 500 6 6000 3 Note: For all schemes, minimum amount is as per above table and thereafter in multiple of ₹1

For Long Term Equity Fund Minimum amount is as per above table and thereafter in multiple of ₹ 1. of ₹ 500°.

- If no amount is mentioned minimum scheme amount would be considered i.e. for Axis Long 5. Term Equity Fund minimum amount would be ₹ 500/- and for other schemes minimum amount would be ₹ 1,000/-.
- For details about the Scheme and its facility please refer the SID, SAI & KIM of the respective schemes / Addendum issued from time to time carefully before investing. 6.
- The SIP will be discontinued automatically if payment is not received for three successive 7. installments.
- Investors can discontinue a SIP at any time by sending a written request to any Official Point of Acceptance or to the registrar M/s. KFin Technologies Private Limited. Notice of such discontinuance should be received at least 20 days prior to the due date of the next installment/debit. 8.
- Mandate will be processed through NACH platform offered by NPCI.
- As per SEBI circular dated August 22, 2011, Transaction Charge per subscription of ₹ 10,000/- and above shall be charged from the investors and shall be payable to the 10. distributors/ brokers (who have not opted out of charging the transaction charge) in respect of applications routed through distributor/broker relating to Purchases / subscription / new inflows only (lumpsum and SIP), subject to the following:
  - For Existing / New investors: ₹100 / ₹150 as applicable per subscription of ₹10,000/and above
  - Transaction charge for SIP shall be applicable only if the total commitment through SIP amounts to ₹10,000/- and above. In such cases the transaction charge would be recovered in maximum 4 successful installments.
  - There shall be no transaction charge on subscription below ₹10,000/-
  - There shall be no transaction charges on direct investments.
  - There shall be no transaction charges for transaction other than purchases/subscriptions relating to new inflows such as Switches, etc.

Transactions carried out through the Stock Exchange platforms for mutual funds shall not be subject to transaction charges

The requirement of minimum application amount shall not be applicable if the investment amount falls below the minimum requirement due to deduction of transaction charges from the subscription amount.

However, the option to charge "transaction charges" is at the discretion of the distributors. Investors may note that distributors can opt to receive transaction charges based on type of

- the Scheme. Accordingly, the transaction charges would be deducted from the subscription amounts, as applicable
- amounts, as applicable. Investor will not hold Axis Mutual Fund, its registrars and other service providers responsible if the transaction is delayed or not effected or the investor bank account is debited in advance or after the specific SIP date due to various clearing cycles of NACH Debit/ Local/Bank holiday. Axis Mutual Fund, its registrars and other service providers shall not be held responsible or liable for damages / compensation / loss incurred by the investor as a result of using the SIP or ECS / Auto debt facility. The investor assumes the entire risk of using this facility and takes full responsibility. 11.
- Investor can change bank details for SIP by submitting a "CHANGE OF BANK MANDATE -FOR SIP" form available on the website or at any Investor Service Centre along with cancelled cheque of the new bank with the investor's name printed on it. 12.
- TOP-UP Facility: Under this facility the Investor can increase the SIP installment at pre-defined intervals by a fixed amount or any time as per the request. This facility is available for individual 13. investors only. For availing the said facilities, investors are required to note the following
  - Investor willing to register TOP-UP should provide the TOP-UP details along with the SIP enrolment details
  - The minimum amount for Axis TOP-UP facility is ₹500/- and in multiples of ₹1/- for all schemes; except Axis Long Term Equity Fund the minimum amount is ₹500 and in multiples of ₹500 thereafter.
  - If no amount is mentioned as TOP-UP amount under frequency yearly and half-yearly, minimum TOP-UP amount would be considered, i.e., ₹ 500/- for all schemes.
  - TOP-UP frequencies available are Half-Yearly/Yearly/Dynamic requested intervals.
  - In case TOP-UP frequency is not indicated, it will be considered as Yearly by Default.
  - The date for Axis Mutual Fund TOP-UP Facility will correspond to the registered SIP.
  - TOP-UP will continue till the End of the SIP tenure by default.
  - In case an investor wishes to change the Top-Up amount, he/she has to provide a cancellation for the existing SIP and register fresh SIP.
  - Only TOP-UP cannot be discontinued anywhere during the SIP tenure
  - In case of Dynamic Top up option, any changes in the amount can be made only after completion of 6 months from the date of the first installment and minimum gap between two top up requests should be 3 months and amount specified in last request shall be continued till the End of the SIP tenure.
  - Please see the illustration below to know how to calculate SIP Top-Up amount SIP Starts on 07/May/2016 · SIP ends on 07/12/2099 · SIP amount is ₹1000
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Top-Up date	SIP Amount (₹)	Top-Up Amount (₹)	New SIP Amount (₹)
7-Nov-2016	1000	500	1500
7-May-2017	1500	500	2000
7-Nov-2017	2000	500	2500
7-May-2018	2500	500	3000



# **ONE TIME MANDATE (OTM) FORM**

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

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# **INSTRUCTIONS FOR ONE TIME MANDATE**

- 1. One Time Mandate is currently available to HUFs, Proprietor Firms and individual investors with "Single" or "Either or Survivor" the mode of holding.
- Registration of One Time Mandate will take 21 days from the date of submission of form.
- 3. Mandate will be processed through NACH platform offered by NPCI.
- 4. "National Automated Clearing House (NACH)" is Direct Electronic Debit mode implemented by National Payments Corporation of India (NPCI), list of banks is available on NPCI website www.npci.org.in. The said list is subject to modifications. The investor agrees to abide by the terms and conditions of NACH Debit/ECS of Reserve Bank of India/Banks.
- 5. In case the Mandatory fields on the Mandate are not filled, the mandate will be rejected.
- 6. Maximum Amount: The MAXIMUM AMOUNT is the per transaction maximum limit. As investor can register for multiple SIPs with one time NACH mandate. The transaction amount should not exceed the maximum amount mentioned in the NACH mandate. It is suggested to choose a higher amount to commence additional investments in future or to absorb Top-Up increments.
- Axis One Time Mandate cannot be utilized for Liquid schemes, ETF schemes, closed ended schemes, and during NFO period.
- 8. Special instructions for EasyCall / EasySMS facility:
  - Post registration, you can invest less than 2,00,000/- at a time using EasyCall & EasySMS.
  - The Distributor ARN for an EasyCall/EasySMS transaction will be the same as registered against the folio in which the transaction is being done. In case a folio has multiple brokers registered, then the EasyCall transaction is made under the Distributor ARN of the last transaction in the folio.
  - The Investor agrees that all calls received shall be eligible for same day NAV subject to necessary formalities to be complied by the AMC in case of transaction through EasyCall & EasySMS Facility on or before the uniform cut off time.
  - SIP is not available through Easy SMS.
  - The cut off time for EasyCall transactions is 2:30pm on all business days and if the call for transaction is received after 2:30 pm it would be considered for the next day transaction.
  - The cut off time for EasySMS transactions is 3:00 pm on all business days and if the SMS for transaction is received after 3:00 pm it would be considered for the next day transaction
  - Requests like change in bank mandate, change of nomination, change in mode of holding, change of address or such other requests as the AMC may decide from time to time will not be permitted using the EasyCall & EasySMS facility.
- 9. The Investor/s shall not hold the AMC liable for the following:
  - For any transaction using the Facility carried out in good faith by the AMC on instructions of the Investor/s.
  - For unauthorized usage/ unauthorized transactions conducted by using the Facility.
  - For any loss or damage incurred or suffered by the Investor/s due to any error, defect, failure or interruption in the provision of the Facility arising from or caused by any reason whatsoever.

- For any negligence/mistake or misconduct by the Investor/s.
- For any breach or non-compliance by the Investor/s of the rules/ terms and conditions stated in the Scheme Information Document.
- For not verifying the identity of the person giving the telephone instructions in the Investor/s name.
- For not carrying out any such instructions where the AMC has reason to believe (which decision of the AMC the Investor/s shall not question or dispute) that the instructions given are not genuine or are otherwise improper, unclear, vague or cause for doubt.
- For carrying out a transaction after such reasonable verification as the AMC may deem fit regarding the identity of the Investor/s.
- In case of error in NAV communication.
- For accepting instructions given by any one of the Investor/s or his/her authorized person.
- 10. Axis Asset Management Company Limited (AMC) has the right to ask such information (Key Information) from the available data of the Investor/s before allowing him/ her access to avail the One Time Mandate facility (the Facility). If for any reason, the AMC is not satisfied with the replies of the Investor/s, the AMC has at its sole discretion the right of refusing access without assigning any reason/s to the Investor/s.
- 11. It is clarified that the Facility is only with a view to accommodate / facilitate the Investor/s and offered at the sole discretion of the AMC. The AMC is not bound and/or obliged in any way to give access to the Facility to Investor/s.
- 12. The Investor/s shall check his/ her account records carefully and promptly. If the Investor/s believes that there has been a mistake in any transaction using the Facility, or that an unauthorized transaction has been effected, the Investor/s shall notify the AMC immediately. If the Investor/s defaults in intimating the discrepancies in the statement within a period of fifteen days of receipt of the statements, he waives all his rights to raise the same in favor of the AMC, unless the discrepancy/ error is apparent on the face of it. By opting for the facility the Investor/s hereby irrevocably authorizes and instructs the AMC to act as his/ her agent and to do all such acts as AMC may find necessary to provide the Facility.
- 13. The Investor/s shall at all times be bound by any modifications and/ or variations made to these Terms and Conditions by the AMC at their sole discretion and without notice to them.
- 14. The Investor/s agrees and confirms that the AMC has the right to ask the Investor/s for an oral or written confirmation of any transaction request using the Facility and/ or any additional information regarding the Account of the Investor/s.
- 15. The Investor/s agrees and confirms that the AMC may at its sole discretion suspend the Facility in whole or in part at any time without prior notice.
- 16. The Investor/s shall not assign any right or interest or delegate any obligation arising herein.
- 17. The Investor/s shall take responsibility for all the transactions conducted by using the Facility and will abide by the record of transactions generated by the AMC. Further, the Investor/s confirms that such records generated by the AMC shall be conclusive proof and binding for all purposes and may be used as evidence in any proceedings and unconditionally waives all objections in this behalf.
- 18. The Investor/s agrees that use of the Facility will be deemed acceptance of the Terms and Conditions and the Investor/s will unequivocally be bound by these Terms and Conditions.