

AXIS ATMANIRBHAR SIP - ENROLMENT FORM

APPLICATION NO.
74252060
FOR EXISTING / FIRST TIME INVESTORS FOR SIP INVESTMENTS
(PLEASE READ THE INSTRUCTIONS BEFORE FILLING UP THE FORM. ALL SECTIONS TO BE COMPLETED IN ENGLISH IN BLACK/BLUE COLOURED INK & IN BLOCK LETTERS)

Distributor ARN	SUB-Distributor ARN	Internal SUB-Broker/Sol ID	EUIN	Employee Code	RIA CODE [^]	PMR (Portfolio Manager's Registration) Number ^{^^}	Serial No., Date & Time Stamp

Upfront commission shall be paid directly by the investor to the AMFI registered distributor based on the investor's assessment of various factors including the service rendered by the distributor. [^]I/We, have invested in the scheme(s) of Axis Mutual Fund under Direct Plan. I/We hereby give my/our consent to share/provide the transactions data feed/portfolio holdings/NAV etc. in respect of my/our investments under Direct Plan of all schemes of Axis Mutual Fund, to the above mentioned SEBI Registered Investment Adviser. ^{^^}I/We, have invested in the scheme(s) of Axis Mutual Fund under Direct Plan. I/We hereby give my/our consent to share/provide the transactions data feed/portfolio holdings/NAV etc. in respect of my/our investments under Direct Plan of all schemes of Axis Mutual Fund, to the above mentioned SEBI Registered Portfolio Manager.

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

You/ Sole Applicant	Second Applicant	Third Applicant	Power of Attorney Holder
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TRANSACTION CHARGES FOR APPLICATIONS THROUGH DISTRIBUTORS ONLY

I confirm that I am a first time investor across Mutual Funds. **OR** I confirm that I am an existing investor across Mutual Funds. In case the subscription amount is ₹ 10,000 or more and your Distributor has opted to receive Transaction Charges, the same are deductible as applicable from the purchase/subscription amount and payable to the Distributor. Units will be issued against the balance amount invested.

Unit Holding Option
 Physical Mode

1. YOUR INFORMATION (MANDATORY)

Ref. instr. no. 4

 New folio will be created for initial Atmanirbhar SIP.

EXISTING ATMANIRBHAR FOLIO NUMBER

(If you have existing Atmanirbhar folio, please mention here.)

Folio number

Your Name (as in PAN Card / KYC records)

Mr. Ms. M/s.

Your PAN

 2nd Holder PAN

 3rd Holder PAN

2. SIP DETAILS

Ref. instr. no. 8

SIP Registration Mode

 A-OTM

 K-OTM

 Mandate along with SIP form

OTM Reference No.

 Option A - SIP and SWP in same scheme

 Option B - SIP and SWP in different Scheme

Ref. instr. no. 5

Scheme / Plan	Option	Frequency	SIP Date (DD) (Ref inst 2)	Enrollment Period (Please tick)	SIP Amount
	<input checked="" type="checkbox"/> Growth	<input checked="" type="checkbox"/> Monthly	<input type="text"/> Default SIP Date 7th	<input type="checkbox"/> 8 yrs <input type="checkbox"/> 10 yrs <input type="checkbox"/> 12* yrs <input type="checkbox"/> 15 yrs <input type="checkbox"/> 20 yrs <input type="checkbox"/> 25 yrs <input type="checkbox"/> 30 yrs (* default tenure)	₹ <input type="text"/> in figures <input type="text"/> in words (Minimum ₹ 1,000/-)

SIP initial payment details (Optional)

Drawn on Bank / Branch name

Amount

Mode

 Cheque/DD

 Cheque/DD

Dated

3. SWP DETAILS* (Target Scheme)

Ref. instr. no. 7

SWP (From Scheme) Only if SIP and SWP schemes are different

Plan

 Regular

 Direct

Option

 Growth

Frequency

 Monthly

SWP Amount

SWP Amount Words

Amount: in words

OR Ref inst no. 7 for default amount

SWP Start date

With effect from month following the month of completion of SIP tenure

SWP End date

(31st December 2099 or till availability of units in the SWP scheme, whichever is earlier)

*In the event that such a day is a holiday, the withdrawal would be affected on the next business day.

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

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

You/ Sole Applicant	Second Applicant	Third Applicant
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Received from

Scheme Name

Plan

Option

Amount

Cheque/DD No.

Date

Bank & Branch details

Stamp & Signature

TERMS & CONDITIONS FOR AXIS ATMANIRBHAR SIP

Axis Mutual Fund ("the Fund") has introduced Atmanirbhar SIP facility ("the Facility") for investments under the Growth Option of Eligible schemes of the Fund as per the following terms and conditions:

1. Multiple SIP registration facility is not available for Atmanirbhar SIP.
2. A minimum gap of 21 days and not more than 90 days needs to be maintained between date of Application & SIP start date.
3. Investor shall have the option of choosing any date of the month as the SIP date except the dates 29th, 30th and 31st. If SIP debit date is not mentioned default date would be considered as 7th of every month. If selected 29th, 30th or 31st, default SIP date would be considered as 28th of every month.
4. New folio will be created for initial Atmanirbhar SIP. For ongoing applications in Atmanirbhar SIP, existing Atmanirbhar Folio will be utilized.
5. **Atmanirbhar SIP facility:**
 - Under this facility, an investor can register for an SIP (Systematic Investment Plan) cum SWP (Systematic Withdrawal Plan) for specified duration.
 - SWP instalments will commence on completion of the SIP tenure.
 - Monthly SIP can be registered in the Eligible schemes for a fixed period of either 8, 10, 12, 15, 20, 25 or 30 years.
 - Existing SIP registrations cannot be converted into Atmanirbhar SIP registrations.
 - On completion of the SIP period, the entire accumulated clear units under Atmanirbhar SIP will be switched into a pre-defined Target scheme chosen by the investor. The switch will be on T+15 days (T being the last SIP transaction date of the Atmanirbhar SIP) [or next business day if that day is a non business day] at Applicable NAV.
 - The units under Target scheme will be allotted under the Plan chosen at time of selecting Source scheme. The switch transaction would be subject to loads and taxes, as applicable.
 - The investor has the option to register the SIP and SWP in the same scheme or different schemes. In case, source scheme name is not mentioned, the application will be rejected. If Source and Target scheme are same, the application will be processed under option A.
 - Investors will have 2 options as under:
 - Option A:** Same scheme for SIP and SWP.
 - Option B:** SIP and SWP will be in different schemes.
 - SIP will be in Source scheme.
 - On completion of SIP Tenure, amount will be switched to Target Scheme at Applicable NAV at the end of 15 days from the date of last SIP instalment and SWP will be carried out from Target Scheme.
 - If Source Scheme is mentioned and Target scheme is not mentioned, Switch & SWP will be registered in default scheme Axis Balanced Advantage Fund.
6. **SIP Amount:** In case SIP Amount is not legible/not clear, the form is liable to be rejected. In case SIP Amount is not selected/mentioned, default amount Rs. 1000 will be considered for SIP registration. Investor cannot modify the amount or tenure under Atmanirbhar Facility.
7. **Atmanirbhar SWP:** On switch of Atmanirbhar SIP, SWP shall be activated from Target scheme from the month following the month of completion of SIP tenure, for an amount specified in the matrix below or as may be specified by the investor.

SIP Tenure	Monthly SWP Instalments
8 Years	1.0 times monthly SIP Instalments
10 Years	1.5 times monthly SIP Instalments
12 Years	2.0 times monthly SIP Instalments
15 Years	3.0 times monthly SIP Instalments
20 Years	5.0 times monthly SIP Instalments
25 Years	8.0 times monthly SIP Instalments
30 Years	12.0 times monthly SIP Instalments

- SWP date will be same as the SIP date.
 - SIP Switch/Modification facility is not available under this Facility. Investor can change the target scheme during last three months of completion of SIP tenure.
8. **Eligible Schemes:** The Eligible Source scheme and Target Scheme under the Facility are as under:


Source Schemes	Target Schemes
Equity oriented schemes excluding Exchange Traded Funds, Solution oriented schemes and Axis Long Term Equity Fund	All schemes except Exchange Traded Funds, Solution oriented schemes and Axis Long Term Equity Fund
Hybrid Schemes	
Equity Index Funds	
Axis Equity ETF Fund of Fund	
Axis Nasdaq 100 Fund of Fund	

 - The facility is only available under Growth option. However, it is available under both Regular and Direct plans of the Eligible Source scheme and Target Scheme.
 - The AMC reserves the right to modify list of eligible schemes from time to time.
 9. **Cancellation of Atmanirbhar facility:** The registration under the Facility will be discontinued:
 - Investor can discontinue the facility by giving 10 calendar days written notice to any nearest OPA/ISC of Axis Mutual Fund.
 - On cancellation/cessation of SIP before the end of SIP tenure, the switch and SWP facility will cease.
 - In case of redemption/switch out is processed in Source Scheme after the SIP tenure till the execution of SWP, SWP will cease.
 - In case redemption/switch out is processed in Source Scheme during the SIP tenure, the switch transaction and SWP facility will cease, however SIP shall continue like normal SIP.
 - In case of investor demise intimation during the SIP tenure, the switch and the SWP shall cease.
 - In case of investor demise intimation post SIP tenure but upto Dec 2099 (or till units are available), the SWP shall cease.
 - The SIP will be discontinued automatically if payment is not received for three successive instalments.
 10. Under the Atmanirbhar SIP folio, investor may undertake Additional Purchase/Switch-in/Atmanirbhar SIP/STP/registrations etc. However, only total clear units accumulated through Atmanirbhar SIP facility will be considered for switch to Target Scheme.
 11. Purchase and Switch in is allowed under the Target Scheme. However, SWP amount under the facility would be triggered on a first in first out basis.
 12. The Facility is available only under non-demat mode.
 13. The Facility is not available to minor investors.
 14. This facility is available for individuals and non individual investors.
 15. All other terms and conditions applicable to Systematic Investment Plan and Systematic Withdrawal Plan (SWP) facilities for respective schemes shall apply mutatis mutandis to this Facility.

The AMC/Trustee reserves the right to change/modify the terms and conditions of the facility or withdraw the facility.

Investors are requested to refer to the Enrolment Form available on our website viz. www.axismf.com or with ISCs, for the latest terms and conditions, before enrolling.

ONE TIME MANDATE (OTM) FORM

	UMRN	<input type="text"/>	Bank use	<input type="text"/>	Date	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Tick <input checked="" type="checkbox"/>	Sponsor Bank Code	<input type="text"/>	Bank use	Utility Code	<input type="text"/>	Bank use										
CREATE <input checked="" type="checkbox"/>	I/We hereby authorize	Axis Mutual Fund			to debit (tick <input checked="" type="checkbox"/>)	<input type="checkbox"/> SB	<input type="checkbox"/> CA	<input type="checkbox"/> CC	<input type="checkbox"/> SB-NRE	<input type="checkbox"/> SB-NRO	<input type="checkbox"/> Other					
MODIFY <input type="checkbox"/>	Bank a/c number	<input type="text"/>														
CANCEL <input type="checkbox"/>	with Bank	<input type="text"/>			IFSC	<input type="text"/>			or MICR	<input type="text"/>						
an amount of Rupees		<input type="text"/>						In Words	₹	<input type="text"/>						
FREQUENCY	<input checked="" type="checkbox"/> Mthly	<input checked="" type="checkbox"/> Qtly	<input checked="" type="checkbox"/> H-Yrly	<input checked="" type="checkbox"/> Yrly	<input checked="" type="checkbox"/> As & when presented	DEBIT TYPE		<input checked="" type="checkbox"/> Fixed Amount	<input checked="" type="checkbox"/> Maximum Amount							
Reference 1	<input type="text"/>			PAN No.	<input type="text"/>			Phone No.	<input type="text"/>							
Reference 2	<input type="text"/>			All Schemes of Axis Mutual Fund	<input type="text"/>			Email ID	<input type="text"/>							

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

PERIOD		
From	<input type="text"/>	<input type="text"/>
To	<input type="text"/>	<input type="text"/>
Maximum period of validity of this mandate is 40 years only.		
1. _____	2. _____	3. _____
Signature Primary Account holder	Signature of Account holder	Signature of Account holder
Name as in bank records	Name as in bank records	Name as in bank records

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

INSTRUCTIONS FOR ONE TIME MANDATE

1. One Time Mandate is currently available to HUFs, Proprietor Firms, Non-individual and individual investors with "Single" or "Either or Survivor" the mode of holding. If any other record is reported, the same will be registered as NACH mandate only.
2. 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.
7. Axis One Time Mandate cannot be utilized for Liquid schemes, ETF schemes, closed ended schemes, and during NFO period.
8. 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.
9. 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.
10. 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.
11. 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.
12. 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.
13. 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.
14. 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.
15. The Investor/s shall not assign any right or interest or delegate any obligation arising herein.
16. 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.
17. The Investor/s agrees that use of the Facility will be deemed acceptance of the Terms and Conditions and the Investor/s will unequivocally be bound by these Terms and Conditions.

SIP REGISTRATION FORM

for first time investors, submit Common Application form along with this form.

Distributor ARN	SUB-Distributor ARN	Internal SUB-Broker/Sol ID	EUIN	Employee Code	RIA CODE^	PMR (Portfolio Manager's Registration) Number ^^	Serial No., Date & Time Stamp

Upfront commission shall be paid directly by the investor to the AMFI registered distributor based on the investor's assessment of various factors including the service rendered by the distributor. ^I/We, have invested in the scheme(s) of Axis Mutual Fund under Direct Plan. I/We hereby give my/our consent to share/provide the transactions data feed/portfolio holdings/NAV etc. in respect of my/our investments under Direct Plan of all schemes of Axis Mutual Fund, to the above mentioned SEBI Registered Investment Adviser. ^^I/We, have invested in the scheme(s) of Axis Mutual Fund under Direct Plan. I/We hereby give my/our consent to share/provide the transactions data feed/portfolio holdings/NAV etc. in respect of my/our investments under Direct Plan of all schemes of Axis Mutual Fund, to the above mentioned SEBI Registered Portfolio Manager.

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

You/ Sole Applicant /Guardian	Second Applicant	Third Applicant	Power of Attorney Holder
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TRANSACTION CHARGES FOR APPLICATIONS THROUGH DISTRIBUTORS ONLY (Refer Instruction No. 20)

I confirm that I am a first time investor across Mutual Funds. **OR** I confirm that I am an existing investor across Mutual Funds.

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

1. YOUR INFORMATION (MANDATORY)

EXISTING INVESTOR'S FOLIO NUMBER

(If you have an existing folio with KYC validated, please mention here)

Folio number

Your Name (as in PAN Card / KYC records)

Mr. Ms. M/s.

Name of the Guardian

Mr. Ms. M/s.

(In case First / Sole Applicant is minor) / Contact Person - Designation / PdA HOLDER (In case of Non-individual Investors)

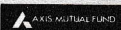
Your PAN

2nd Holder PAN

3rd Holder PAN

DO NOT FILL THE MANDATE BELOW, IF OTM DETAILS ARE PROVIDED IN SECTION 2 ON THE NEXT PAGE.

To register Axis One Time Mandate, please fill and submit the One Time Mandate form separately.



UMRN

Bank use

Date

Tick (✓)

Sponsor Bank Code

Bank use

Utility Code

Bank use

CREATE

I/We hereby authorize

Axis Mutual Fund

to debit (tick✓)

SB

CA

CC

SB-NRE

SB-NRO

Other

MODIFY

CANCEL

Bank a/c number

with Bank

Name of customers bank

IFSC

or MICR

an amount of Rupees

In Words

₹

In Figures

FREQUENCY

Mthly

Qtly

H-Yrly

Yrly

As & when presented

DEBIT TYPE

Fixed Amount

Maximum Amount

Reference 1

PAN No.

Phone No.

Reference 2

All Schemes of Axis Mutual Fund

Email ID

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

PERIOD

From

DDMMYY

To

DDMMYY

Maximum period of validity of this mandate is 40 years only

Signature Primary Account holder

Signature of Account holder

Signature of Account holder

1.

Name as in bank records

2.

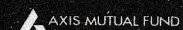
Name as in bank records

3.

Name as in bank records

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

MANDATORY FIELDS : • Instrument Date • Account type • Bank A/c number (core banking a/c no only) • Bank name • IFSC code or MICR code (as per the cheque / pass book) • Amount (in words & in figures) • Period start date and end date • Account holder signature • Account holder name as per bank records



ACKNOWLEDGMENT SLIP (To be filled by the investor)

Investor Name	
SIP Scheme 1	Top-up <input type="checkbox"/> Yes <input type="checkbox"/> No
SIP Scheme 2	Top-up <input type="checkbox"/> Yes <input type="checkbox"/> No
SIP Scheme 3	Top-up <input type="checkbox"/> Yes <input type="checkbox"/> No

Stamp & Signature

2. SIP DETAILS

SIP Registration Mode A-OTM K-OTM Mandate along with SIP form

OTM Reference No.

Scheme / Plan / Option	Frequency (Ref Inst. no. 3 & 4)	SIP Date/Day (DD) (Ref Inst. no. 3)	Enrollment Period (MMYY)	SIP Amount	TOP-UP Facility (Optional) Only available for Monthly SIP	
					Frequency	Amount
	<input type="checkbox"/> **Daily	Default SIP Date 7th	From <input type="text"/> To <input type="text"/> Maximum Duration of 40 years	₹ <input type="text"/> in figures in words	<input type="checkbox"/> Half Yearly	₹ <input type="text"/> in figures
	<input type="checkbox"/> #Weekly				<input type="checkbox"/> Yearly	<input type="text"/> in words
	<input type="checkbox"/> *Monthly				<input type="checkbox"/> Dynamic TOP-UP	
	<input type="checkbox"/> *Yearly				<input type="checkbox"/> Half Yearly	₹ <input type="text"/> in figures
	<input type="checkbox"/> **Daily	Default SIP Date 7th	From <input type="text"/> To <input type="text"/> Maximum Duration of 40 years	₹ <input type="text"/> in figures in words	<input type="checkbox"/> Half Yearly	₹ <input type="text"/> in figures
	<input type="checkbox"/> #Weekly				<input type="checkbox"/> Yearly	<input type="text"/> in words
	<input type="checkbox"/> *Monthly				<input type="checkbox"/> Dynamic TOP-UP	
	<input type="checkbox"/> *Yearly				<input type="checkbox"/> Half Yearly	₹ <input type="text"/> in figures
	<input type="checkbox"/> **Daily	Default SIP Date 7th	From <input type="text"/> To <input type="text"/> Maximum Duration of 40 years	₹ <input type="text"/> in figures in words	<input type="checkbox"/> Half Yearly	₹ <input type="text"/> in figures
	<input type="checkbox"/> #Weekly				<input type="checkbox"/> Yearly	<input type="text"/> in words
	<input type="checkbox"/> *Monthly				<input type="checkbox"/> Dynamic TOP-UP	
	<input type="checkbox"/> *Yearly				<input type="checkbox"/> Half Yearly	₹ <input type="text"/> in figures

SIP initial payment details (Optional)

Drawn on bank / branch name <input type="text"/>	Amount <input type="text"/>
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Mode <input type="checkbox"/> Cheque/DD <input type="checkbox"/> Cheque/DD <input type="text"/>	Dated <input type="text"/>
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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')

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

You/ Sole Applicant /Guardian	Second Applicant	Third Applicant
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INSTRUCTIONS FOR SIP & TOP-UP

- Multiple SIP registration facility is not available for Axis Children's Gift Fund, ETF schemes and during NFO.
 - OTM end date cannot be more than 40 years from the date of the mandate.
 - 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.
 - *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 7th of every month. If the SIP date falls on a non-business day or a bank holiday, the SIP debit will be processed on the following business day. ** Will be triggered and processed only on Business Days. # will be triggered and processed on the day opted by the investor. If the day opted falls on non-Business day, it will be triggered and processed on the next business day.
 - Please refer below table for minimum installments:
- | | **Daily/#Weekly*/Monthly | | *Yearly | | | |
|--|--------------------------|-----------|----------|-----------|---------|-----------|
| | Min. ₹ | Min Inst. | Min. ₹ | Min Inst. | | |
| All schemes, except ETFs & schemes mentioned in tables below. | 100 | 6 | 12000 | 3 | | |
| | **Daily/#Weekly | | *Monthly | | *Yearly | |
| | Min. ₹ | Min Inst. | Min. ₹ | Min Inst. | Min. ₹ | Min Inst. |
| Axis Overnight Fund & Axis Liquid Fund | 1000 | 6 | NA | NA | NA | NA |
| Axis Long Term Equity Fund* | NA | NA | 500 | 6 | 6000 | 3 |
| Axis Banking & PSU Debt Fund, Axis Childrens Gift Fund, Axis Credit Risk Fund, Axis Dynamic Bond Fund, Axis Equity ETFs FoF, Axis Floater Fund, Axis Gilt Fund, Axis Money Market Fund, Axis Retirement Savings Fund, Axis Short Term Fund, Axis Silver Fund Of Fund, Axis Treasury Advantage Fund, Axis Ultra Short Term Fund | 100 | 6 | 1000 | 6 | 12000 | 3 |
| Axis Nifty AAA Bond Plus SDL Apr 2026 50:50 ETF FoF, Axis CRISIL IBX 50:50 Gilt Plus SDL September 2027 Index Fund, Axis CRISIL IBX 50:50 Gilt Plus SDL June 2028 Index Fund & Axis Nifty SDL September 2026 Debt Index Fund | NA | NA | 1000 | 6 | NA | NA |
| Axis CRISIL IBX SDL May 2027 Index Fund, Axis CRISIL IBX 70:30 CPSE Plus SDL April 2025 Index Fund & Axis Long Duration Fund | NA | NA | 1000 | 6 | 12000 | 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 ₹500.
- If no amount is mentioned minimum SIP installment amount would be considered.
 - 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.
 - The SIP will be discontinued automatically if payment is not received for three successive installments.
 - Investors can discontinue a SIP at any time by sending a written request to any Official Point of Acceptance or to the registrar KFin Technologies Limited. Notice of such discontinuance should be received at least 10 days prior to the due date of the next installment / debit.
 - 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 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.
- 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 debit facility. The investor assumes the entire risk of using this facility and takes full responsibility.
 - Investor can change bank details for SIP by submitting a "CHANGE OF BANK MANDATE - FOR SIP" form available on the website or at any Investor Service Centre along with cancelled cheque of the new bank with the investor's name printed on it.
 - TOP-UP Facility: Under this facility the Investor can increase the SIP installment at pre-defined intervals by a fixed amount or any time as per the request. This facility is available for individual investors only. For availing the said facilities, investors are required to note the following:
 - Investor willing to register TOP-UP should provide the TOP-UP details along with the SIP 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
 - Top-Up amount is ₹ 500 • Top-Up Frequency is Half-yearly

Top-Up date	SIP Amount (₹)	Top-Up Amount (₹)	New SIP Amount (₹)
7-Nov-2016	1000	500	1500
7-May-2017	1500	500	2000
7-Nov-2017	2000	500	2500
7-May-2018	2500	500	3000

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.

01  **INVESTOR DETAILS** (If One Time Mandate registration is not required, skip this section and only fill the NACH Mandate below.)

Name of Applicant

PAN

Bank Name Account No.

I / We declare that the particulars furnished here are correct. I / We authorize Axis Mutual Fund acting through its service providers to debit my / our bank account towards payment of SIP installments and/ or any lumpsum payments through an Electronic Debit arrangement / NACH (National Automated Clearing House) as per my request from time to time.

If the transaction is delayed or not effected at all for reasons of incomplete or incorrect information, I/We would not hold the user institution responsible.

I/We will also inform Axis Mutual Fund about any changes in my bank account.

I/We hereby authorize to honour such payments and have signed and endorsed the Mandate Form.

Further, I authorize my representative (the bearer of this request) to get the above Mandate verified. Mandate verification charges, if any, may be charged to my/our account.

I/We hereby agree to read the respective SID and SAI of the mutual fund before investing in any scheme of Axis Mutual Fund using this facility.

I/We request you to make provisions for me/ us and/ or an advisor authorized by me to be able to utilize this mandate for any transaction (not limited to SIP and/ or Lumpsum payments) in all the folios associated with my PAN mentioned above any mode of transaction available to me time to time from Axis Mutual Fund.

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.

Signature of PAN Holder (as per folio record)

Date Place

UMRN Bank use Date

Tick **CREATE** **MODIFY** **CANCEL**

Sponsor Bank Code Bank use Utility Code Bank use

I/We hereby authorize **Axis Mutual Fund** to debit (tick) SB CA CC SB-NRE SB-NRO Other

Bank a/c number

with Bank Name of customers bank IFSC or MICR

an amount of Rupees In Words ₹ In Figures

FREQUENCY Mthly Qtly H-Yrly Yrly As & when presented DEBIT TYPE Fixed Amount Maximum Amount

Reference 1 PAN No. Phone No.

Reference 2 All Schemes of Axis Mutual Fund Email ID

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

PERIOD

From

To

Maximum period of validity of this mandate is 40 years only

1. Signature Primary Account holder Name as in bank records

2. Signature of Account holder Name as in bank records

3. Signature of Account holder Name as in bank records

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

MANDATORY FIELDS • Instrument Date • Account type • Bank A/c number (core banking a/c no only) • Bank name • IFSC code or MICR code (as per the cheque / pass book) • Amount (in words & in figures) • Period start date and end date • Account holder signature • Account holder name as per bank records

ACKNOWLEDGMENT SLIP (To be filled by the investor)

Investor Name

PAN No.

Stamp & Signature

INSTRUCTIONS FOR ONE TIME MANDATE

1. One Time Mandate is currently available to HUFs, Proprietor Firms and individual investors with "Single" or "Either or Survivor" the mode of holding.
2. OTM end date cannot be more than 40 years from the date of the mandate.
3. Registration of One Time Mandate will take 21 days from the date of submission of form.
4. Mandate will be processed through NACH platform offered by NPCI.
5. "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.
6. In case the Mandatory fields on the Mandate are not filled, the mandate will be rejected.
7. 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.
8. Axis One Time Mandate cannot be utilized for Liquid schemes, ETF schemes, closed ended schemes, and during NFO period.
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.