

STP APPLICATION FORM

SYSTEMATIC TRANSFER PLAN (STP) ENROLMENT FORM (Read Instructions Overleaf)

Broker Code :

Name of Sole/First Applicant (Leave space between first/middle/last name) Salutation Mr. Mrs. M/s.

STP Date 1st 7th 10th 15th Folio/Account Number (for existing investor)

Application Number

Enrolment From : To

Transfer From :

Scheme Name Plan

Amount OR Capital Appreciation

Frequency : DAILY WEEKLY MONTHLY QUATERLY HALF YEARLY

Transfer To:

Folio/Account Number (for existing investor) Plan

SIGNATURE Sole/first Applicant Second Applicant Third Applicant

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TERM & CONDITIONS (STP)

1. Any new investor who wish to opt for Systematic Transfer Plan should fill this form separately along with the main application form quoting all the details clearly in this form; whereas existing investor can fill only this enrollment form giving their name, folio number, and details related to systematic transfer.
 2. Systematic Transfer Plan will not be available for schemes with lock-in period respectively.
 3. STP is effective on the dates chosen viz. 1st / 7th / 10th / 15th of the month based on the frequency. However, in case of weekly frequency, STP is effected on the Friday of the following week in which the original STP application is received at Karvy Center.
 4. Please mention the scheme name from which and to such transfer is to be effected with clearly mentioning the plan name. If you don't have account in the scheme in which you want to transfer your money, please fill the separate application form to open an account in the scheme.
 5. Each transfer will be treated as redemption from which funds are to be transferred and repurchase price will be calculated taking into account the application load, if any.
 6. The Plan will automatically be terminated once there are no units in the accounts from which transfer is to be effected. An investor can change the amount / frequency of transfer with the help of written request to any of our Area Office / Business Centers / Karvy / Agents.
 7. Systematic Transfer Plan will be available under Growth Option only.
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