Nippon India Mutual Fund
Wealth sets you free

Nippon India Step-Up Application Form

APP No.:

1. MFD /RIA INFORMATION

Name & ARN Code	Sub Agent ARN Code	Sub Agent Code /Bank Branch Code/ Internal Code	*Employee Unique Identification Number	RIA Code**
ARN- (ARN stamp here)	ARN-			

*Please sign below in case the EUIN is left blank/not provided. 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.

++ I/We, have invested in the Scheme(s) of your Mutual Fund under Direct Plan. I/We hereby give you 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 Managed by you, to the above mentioned Mutual Fund Distributor / SEBI-Registered Investment Adviser:

SIGN HERE	First / Sole Applicant / Guardian / Authorised Signatory	Second Applicant / Authorised Signatory	Third Applicant / Authorised Signatory

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.

2. APPLICANT DETAILS

FOLIO NO. | | | | | | | | | | | | | | | |

Name of Sole/1st holder Mr./Ms./M/s	PAN No / PEKRN. MANDATORY	☐ KYC
Name of 2nd holder Mr./Ms.	PAN No / PEKRN. MANDATORY	☐ KYC
Name of 3rd holder Mr./Ms.	PAN No / PEKRN. MANDATORY	☐ KYC

3. Existing SIP DETAILS

Scheme / Plan / Option	Frequency (Please ✓ any one)	SIP Amount	SIP Debit Date	Payment Mode	Bank Name / Account number
	☐ Daily$$ ☐ Weekly$$ ☐ Monthly(Default) ☐ Quarterly ☐ Yearly	₹_____ (in figures)	D D (Any date from 1st to 31st of a given month)##	One Time Bank Mandate	_____ _____

Note : $$ Daily & Weekly SIP Frequencies are applicable for normal SIP and not for Flex SIP & Pause Facility. ##For weekly frequency, only 1st, 8th, 15th & 22nd date are eligible of every month.

4. Nippon India Step-Up Details

Step-Up Start Date	Step-Up Amount	Step-Up Frequency	Step-Up Count
D D M M Y Y Y Y	₹ _____ (Multiples of ₹ 100 only**)	☐ Half-yearly ☐ Yearly	Increase SIP amount_____ time(s) (Default 1 time)

** In case of Nippon India ELSS Tax Saver Fund, Nippon India Retirement fund - Income Generation Plan & Nippon India Retirement fund- Wealth Creation Plan, the Step up minimum Amount should be ₹ 500 and in multiples of ₹ 500/-.

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INSTRUCTIONS cum TERMS AND CONDITIONS

1. Under this facility the Investor can increase the SIP installment at pre-defined intervals by a fixed amount. This facility is available for all categories of investors.
2. Investor willing to register STEP-UP should provide the Nippon India STEP-UP details along with the SIP enrolment details or any time during the tenure of the SIP if the SIP is registered through "One Time Bank Mandate Form" from which the amount shall be debited. Investors who are currently registered under Invest Easy - Individuals facility may avail this facility without registering the One Time Bank Mandate.
3. The minimum amount for Nippon India STEP-UP facility is ₹100/- and in multiples of ₹100/- except for Nippon India ELSS Tax Saver Fund, Nippon India Retirement fund - Income Generation Plan & Nippon India Retirement fund- Wealth Creation Plan for which the minimum amount shall be ₹500/- and in multiple of ₹500/-.
4. An investor can opt for Daily, Weekly, Monthly, Quarterly and Yearly frequency for SIP. In case the investor has not specified the frequency then by default the frequency will be treated as Monthly. If an investor does not mention SIP start date appropriately, the SIP will by default start from the next month after meeting the minimum registration requirement of 25th calendar days or 12 calendar days as applicable.
5. Daily, Weekly and Monthly SIP offers STEP-UP frequency at half yearly and yearly intervals. Quarterly and Yearly SIP offers Nippon India STEP-UP frequency at yearly interval only. In case Nippon India STEP-UP frequency is not indicated, it will be considered as Yearly by Default.
6. There should be clear indication about Nippon India STEP-UP Count i.e. the number of times the SIP Installment amount should be increased. In case STEP-UP amount is mentioned and Nippon India STEP UP count is not indicated, it will be considered as 1 (One) by Default.
7. The date for Nippon India STEP-UP Facility will correspond to the registered SIP. The enrolment period specified in the Nippon India STEP-UP form should be less than or equal to the enrolment period mentioned in the SIP.
8. In case of any deviation in period, the tenure of the SIP shall be considered.
9. The minimum gap between the request for Nippon India STEP-UP facility and next SIP installment date should be atleast 10 days (excluding the request date and the next SIP installment date).
10. If an investor does not mention Nippon India STEP-UP start date or the Nippon India STEP-UP start date is unclear in the application form, the Nippon India STEP-UP will by default start from the subsequent installment after meeting the minimum registration requirement of 10 days (excluding the request date and the next SIP installment date).
11. If any Nippon India STEP-UP is pending for execution as per the option selected by investor earlier and investor submits the Nippon India STEP-UP application again, same shall be liable for rejection.
12. If the investors submits request for Modify SIP details for a SIP registration where the Nippon India STEP-UP facility is already registered, the Nippon India STEP-UP facility shall be cancelled immediately upon receipt of Modify SIP details request.
13. The broker code mentioned on the initial SIP registration request will continue even after the STEP-UP registration request is given. In case a different broker code is specified on the STEP-UP registration request then the same will not be considered.

Nippon India Step-Up Form / 21st Nov 2023 / Ver 2.0

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Acknowledgment Slip

(To be filled by the Investor)

APP No.

Received from Mr./Mrs./Ms. _____ Nippon India Step-Up request

for SIP registered for ₹ _____in Folio No. _____under Nippon India _____

with _____ frequency and _____ Debit Date.

Signature, Date & Stamp
Of receiving office

Nippon India Step-Up Details

Step-Up Start Date	Step-Up Amount	Step-Up Frequency	Step-Up Count
D D M M Y Y Y Y	₹ _____ (Multiples of ₹ 100 only**)	☐ Half-yearly ☐ Yearly	Increase SIP amount_____ time(s) (Default 1 time)