

## STEPS FOR ACCOUNT OPENING

**Step 1:** Enter the Email ID and mobile number, then select the relationship with the holder as shown in step 1.1 and verify it by entering the OTPs.

INVESTMENTZ.COM  
INVESTOR FIRST  
BY ASIT C. MEHTA INVESTMENT INTERMEDIATES LTD

CREATE A NEW ACCOUNT

Email ID  
dewal41479@viperace.com

Mobile no.  
Send OTP

ReSend OTP

OTP Disclaimer

Enter Email OTP  
165725

Enter Mobile OTP  
187084

Continue

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**Step 1.1** Select the contact relationship with the applicant.

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CREATE A NEW ACCOUNT

Email ID  
genib20530@pixil.com

Mobile no.  
Send OTP

OTP Disclaimer

Enter Email OTP

Enter Mobile OTP

Continue

Explore the world of investmentz.com

Email ID Declaration

Does the entered Email Id genib20530@pixil.com belongs to you?

Yes No

**Step 2:** Select the segment as per your preference. If you have selected Bank of India, you must **enter your DP ID and Client ID**, agreeing to the terms and conditions. You can also open only Mutual Fund Account by clicking on **Only Mutual Fund**.

**Step 3:** You need to upload a passport-size photo and your signature. Next, click on the **Upload** (Document Upload with Digilocker) button. This button will open a new pop-up where you need to process further as mentioned in further screens. **(Kindly make sure to enable Pop-up in your browser setting)**

**Step 3.1:** Click on **Check box** of declaration then click on **Authenticate Aadhar**.

DigiLocker  
Digilocker KYC  
Please do Digilocker KYC

I provide my consent to share my Aadhaar Number, Date of Birth and Name from my Aadhaar eKYC information with the Income Tax Department, All States for the purpose of fetching my PAN Verification Record into DigiLocker.

By proceeding further I hereby authorize DigiLocker to pull my documents from DigiLocker and share with ASIT C. MEHTA INVESTMENT INTERMEDIATES LIMITED

Authenticate Aadhaar

**Step 3.2:** Enter the 12 digit aadhar number and Captcha and click on **Next** button.

MeriPehchaan by DigiLocker G2  
Digiotech Solutions Private Limited

You are about to link your DigiLocker account with Digiotech Solutions Private Limited application of Digiotech Solutions Pvt. Ltd.. You will be signed up for DigiLocker account if it does not exist.

Enter Aadhaar Number\*

Please enter the following text in the box below:

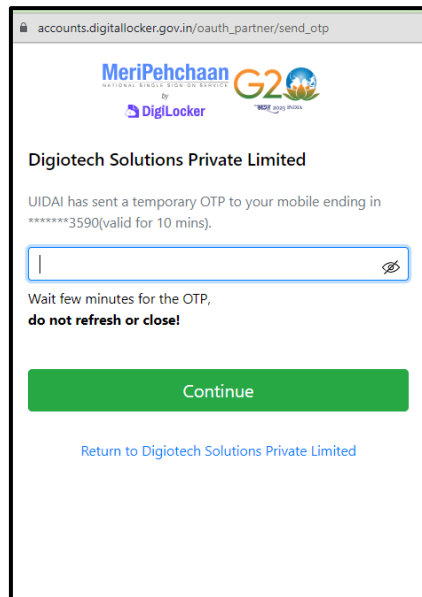
57684

Unable to read the above image? [Try another!](#)

Next

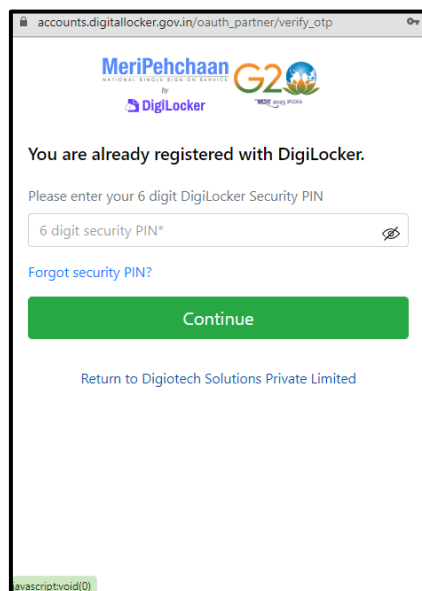
[Return to Digiotech Solutions Private Limited](#)

**Step 3.3:** Enter the 6 digit OTP received on Aadhaar registered mobile number and click on **Continue** button.



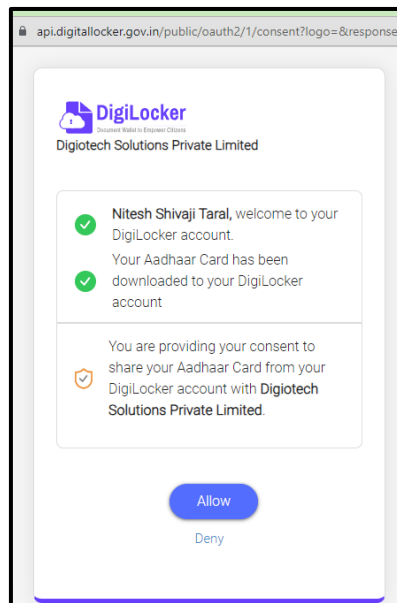
The screenshot shows a web browser window with the URL `accounts.digitallocker.gov.in/oauth_partner/send_otp`. At the top, there are logos for MeriPehchaan, G20, and DigiLocker. The main heading is "Digiotech Solutions Private Limited". Below this, a message states: "UIDAI has sent a temporary OTP to your mobile ending in \*\*\*\*\*3590(valid for 10 mins)." There is a text input field for the OTP. Below the field, it says "Wait few minutes for the OTP, do not refresh or close!". A green "Continue" button is present, along with a link "Return to Digiotech Solutions Private Limited".

**Step 3.4:** Enter your 6 digit security PIN and click on **Continue** button. (Kindly Note if you are login first time in DigiLocker then it will ask to **set your pin**). If you don't remember the password then you can use **Forgot Security PIN**.

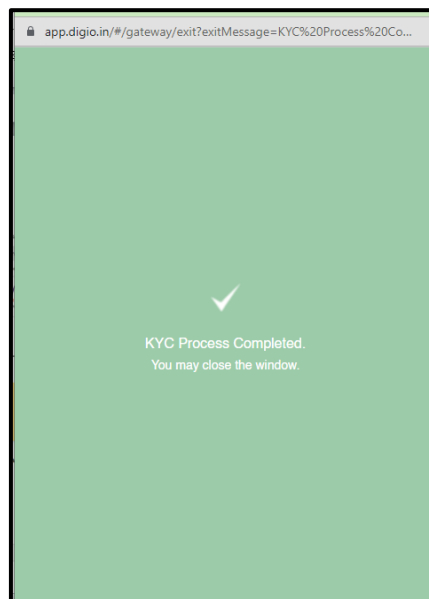


The screenshot shows a web browser window with the URL `accounts.digitallocker.gov.in/oauth_partner/verify_otp`. At the top, there are logos for MeriPehchaan, G20, and DigiLocker. The main heading is "You are already registered with DigiLocker." Below this, a message states: "Please enter your 6 digit DigiLocker Security PIN". There is a text input field for the security PIN. Below the field, there is a link "Forgot security PIN?". A green "Continue" button is present, along with a link "Return to Digiotech Solutions Private Limited".

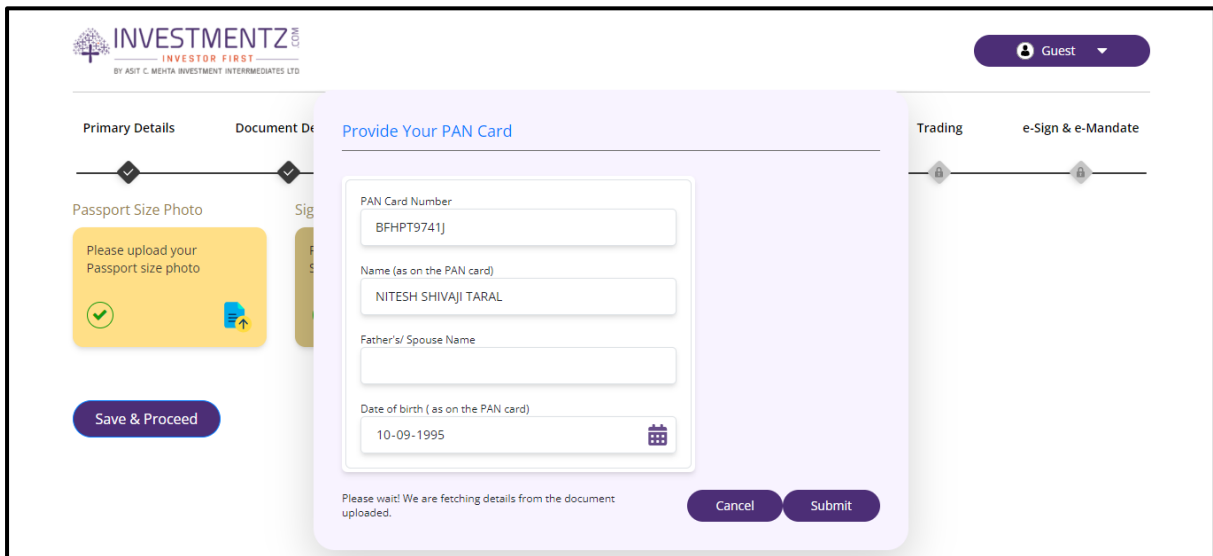
**Step 3.5:** You need to give consent by clicking on **Allow** button.



**Step 3.6:** After fetching the documents successfully from DigiLocker it will give you confirmation and you will be redirected to Investmentz page for further process.



**Step 4:** You need to add the PAN card details if not fetched any from DigiLocker, by clicking on Upload PAN (Father's/Spouse Name) and click on **Submit** button. If you are unable to fetch the documents from Digilocker then you need to upload all documents in JPG, JPEG or PNG format.

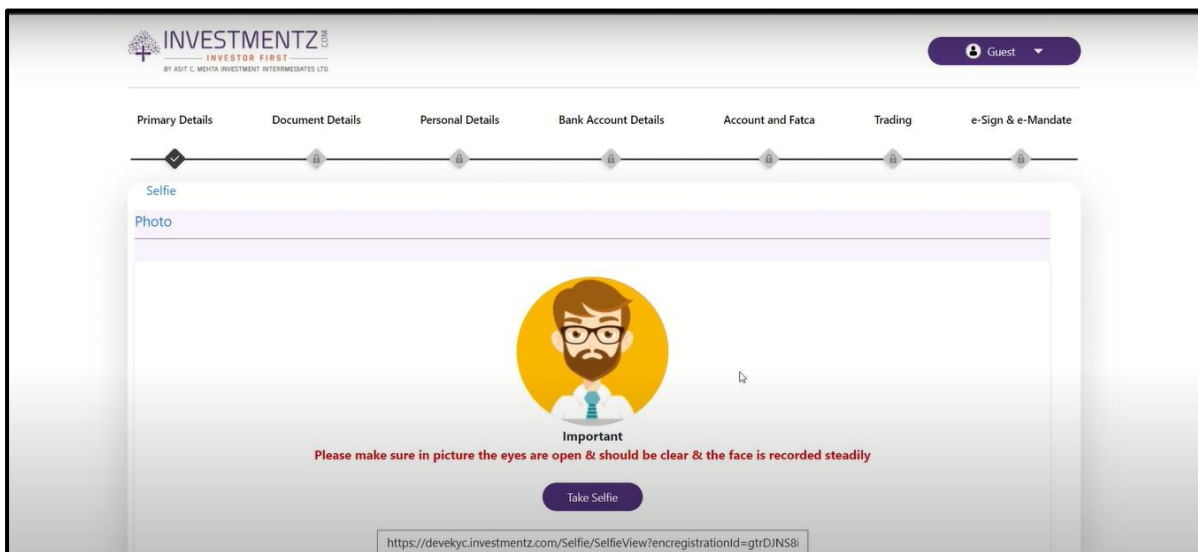


The screenshot shows the 'Provide Your PAN Card' form in the Investmentz portal. The form is titled 'Provide Your PAN Card' and is located in the center of the page. It contains the following fields:

- PAN Card Number: BFHPT9741J
- Name (as on the PAN card): NITESH SHIVAJI TARAL
- Father's/ Spouse Name: (empty field)
- Date of birth (as on the PAN card): 10-09-1995

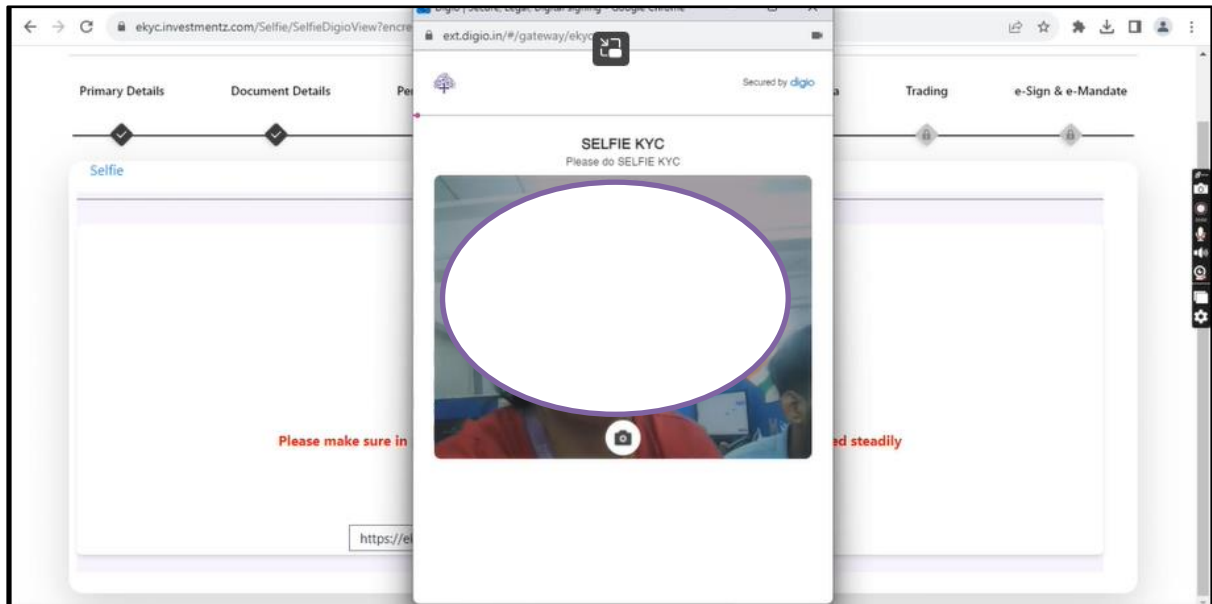
Below the form, there is a message: 'Please wait! We are fetching details from the document uploaded.' and two buttons: 'Cancel' and 'Submit'. The background shows the 'Primary Details' step of the registration process, with a 'Passport Size Photo' upload area and a 'Save & Proceed' button.

**Step 5:** Click on **Take Selfie** button or you can share the link with the applicant. When applicant complete the selfie process then you need to refresh your browser.

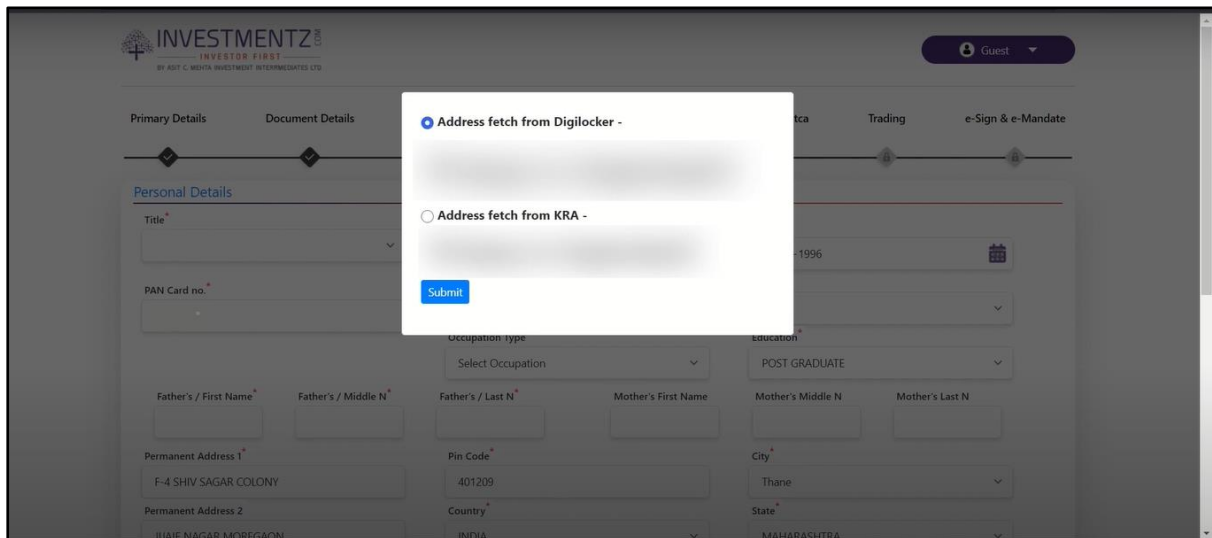


The screenshot shows the 'Selfie' step in the Investmentz portal. The page is titled 'Selfie' and has a 'Photo' section. In the center, there is a circular icon of a man with a beard and glasses. Below the icon, there is a message: 'Important Please make sure in picture the eyes are open & should be clear & the face is recorded steadily'. Below the message, there is a 'Take Selfie' button. At the bottom of the page, there is a URL: <https://devekyc.investmentz.com/Selfie/SelfieView?encregistrationId=gtrDJNS8i>. The background shows the 'Personal Details' step of the registration process.

**Step 6:** If your selfie is good to go then click on **Continue** button otherwise you can retake it by clicking on **Retake** button.



**Step 7:** As per your preference you can select any of the address details as given.



**Step 8:** Enter your Personal details once you are done then click on the **Save and Proceed** button.

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BY ASIT C. MEHTA INVESTMENT INTERMEDIATES LTD

Guest

Primary Details Document Details **Personal Details** Bank Account Details Account and Fatca Trading e-Sign & e-Mandate

### Personal Details

|   |  |                             |
|---|--|-----------------------------|
| Title*<br>Mr  | Name as per PAN Card*                        | DOB*                        |
| PAN Card no.*   | Marital Status*<br>Married                   | Gender*<br>Male             |
| Father's / First Name*  | Occupation Type*<br>SERVICE(PRIVATE COMPANY) | Education*<br>POST GRADUATE |
| Father's / Middle N*  | Father's / Last N*                           | Mother's First Name         |
| Permanent Address 1*  | Pin Code*<br>400055                          | Mother's Middle N           |
| Permanent Address 2   | Country*<br>INDIA                            | Mother's Last N             |
| Permanent Address 3   | Mobile Number*                               | City*<br>Mumbai             |
| Email Id  |  | State*<br>MAHARASHTRA       |
| Correspondence address same as permanent address? <input checked="" type="radio"/> Yes <input type="radio"/> No | Pin Code*<br>400055                          | Telephone                   |
| Correspondence Address 1*   | Country*<br>INDIA                            | City*<br>Mumbai             |
| Correspondence Address 2  |  | State*<br>MAHARASHTRA       |
| Correspondence Address 3  |  |                             |

**Save & Proceed**



**Step 9:** Enter your Bank Account Details and click on the **Validate PennyDrop** button. 1 rupee will be credited to your bank account for bank verification purpose, click on the **Save and Proceed** button if your bank account has been successfully verified.

The screenshot shows the 'Bank Account Details' step of the onboarding process on the Investmentz.com website. The user is logged in as a 'Guest'. The progress bar indicates that 'Primary Details', 'Document Details', and 'Personal Details' are completed, while 'Bank Account Details', 'Account and Fatca', 'Trading', and 'e-Sign & e-Mandate' are pending. The 'Bank Account Details' section contains the following fields:

- Account Number\* (text input)
- UPI ID (text input)
- Re enter Account Number\* (text input)
- Account Type\* (dropdown menu with 'Select' as the current option)
- IFSC Code\* (text input)
- MICR Code\* (text input)

Below the fields is a 'Bank details' section with a 'Validate PennyDrop' button.

If Bank details aren't verified then you need to upload Bank Account proof.


The screenshot shows the 'Bank Account Details' step after a failed verification. The progress bar indicates that 'Primary Details', 'Document Details', 'Personal Details', and 'Bank Account Details' are completed, while 'Account and Fatca', 'Trading', and 'e-Sign & e-Mandate' are pending. The 'Bank Account Details' section contains the following fields:

- Account Number\* (text input with a blue highlight)
- UPI ID (text input)
- Re enter Account Number\* (text input with a blue highlight)
- Account Type\* (dropdown menu with 'Saving' as the selected option)
- IFSC Code\* (text input with a blue highlight)
- MICR Code\* (text input with a blue highlight)

Below the fields is a 'Bank details' section with a greyed-out area and a 'Cancelled Cheque' section. The 'Cancelled Cheque' section contains a teal box with the text 'Please upload your Cancel Cheque' and an upload icon.

At the bottom of the form is a 'Save & Proceed' button.

**Step 10: Enter the Investmentz Account & FATCA details and click on Save and Proceed button.**

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Guest

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Primary Details    Document Details    Personal Details    Bank Account Details    **Account and Fatca**    Trading    e-Sign & e-Mandate

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[Investment Account & FATCA details . . .](#)  
With this account you can start investing in Equity, Mutual Funds, Gold Bond, iBaskets, IPO & various other investments alternatives

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|   |   |   |
|---|---|---|
| <b>Investment Experience*</b><br>--Select--   | <b>Annual Income*</b><br>--Select--                             | <b>Net Worth*</b><br><input type="text"/> |
| Net worth should not be older than 1 year*  |   |   |
| <b>DP Tarrif Plan*</b><br>--Select--  | <b>Source Of Wealth*</b><br>--Select--                          |   |
| <a href="#">Click Here to know more details</a>                                       |   |   |
| <b>Politically Exposed Person*</b> <input type="radio"/> Yes <input type="radio"/> No |   |   |
| <b>Country Of Birth*</b><br>--Select--  | <b>Is Your Country Of Tax Residency Other Than India*</b><br>No |   |

**Save & Proceed**

**Step 11:** Enter the Nominee Details and click on **Save and Proceed** button. You can add up to 3 Nominees and if the nominee age is below 18 then you need to provide the guardian details with their valid ID proof.

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Guest

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Primary Details    Document Details    Personal Details    Bank Account Details    Account and Fatca    Trading    e-Sign & e-Mandate

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**First Nominee Details**

Title\*    Nominee First Name\*    Nominee Middle Name    Nominee Last Name\*

Mr.           

E-mail ID    Mobile No.    Relation with BO\*

       Select Relation

Date of Birth\*    Pan Card Number

dd-mm-yyyy   

Address Same As Client

Address Line 1\*    Pincode\*    City\*

       -- select --

Address Line 2    State\*    Country\*

   -- select --    -- select --

Address Line 3    Percentage of the Allocation of Securities\*

Proof type\*

Select Proof


Residual Securities

Second Nominee Details

Third Nominee Details

**Save & Proceed**

**Step 12:** Enter the Trading details and click on **Save and Proceed** button.



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Guest

Primary Details Document Details Personal Details Bank Account Details Account and Fatca Trading e-Sign & e-Mandate

[Trading Details](#)

I wish to receive ECN, Funds & Securities Statement on my Email ID

Whether you wish to receive Physical Contract Note or Electronic Contract Note (ECN)

Demat Account Details

I/We instruct the DP to receive each and every credit in my/our account  Yes  No

I/We instruct the DP to accept all the pledge instructions in my/our account without any further instructions from my/our end  Yes  No

Account statement requirement (As per SEBI Regulations)  Fortnightly  Monthly

I/We request you to send Electronic Transactions-cum-Holding Statement on the Email ID  Yes  No

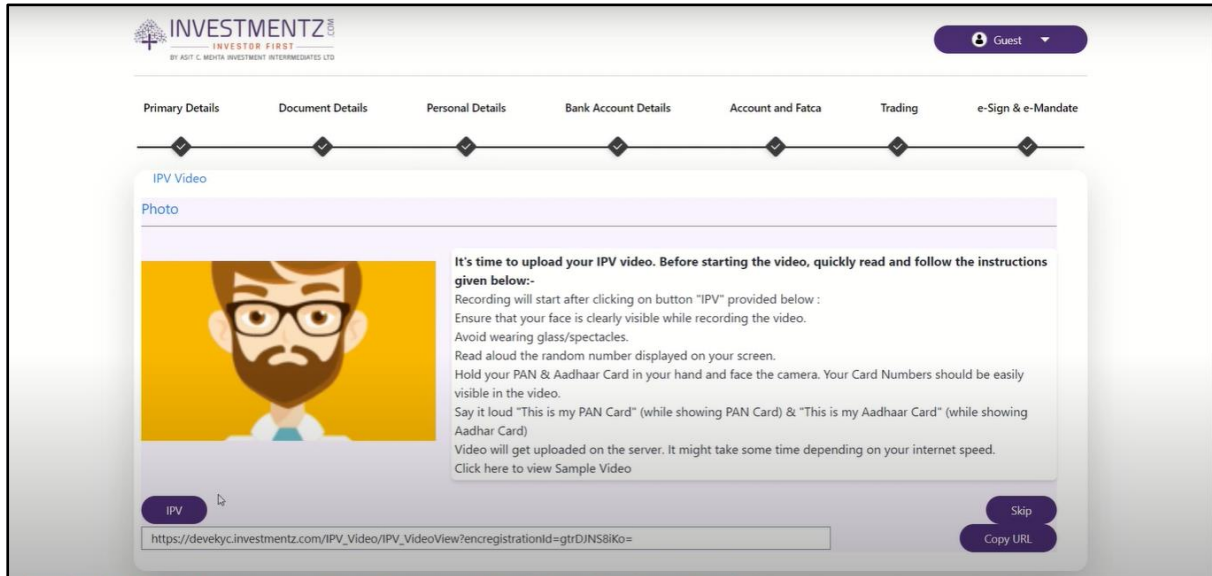
I/We would like to share the Email ID with the RTA  Yes  No

I/We wish to receive the Annual Report  Physical  Electronic  Both (Physical & Electronic)

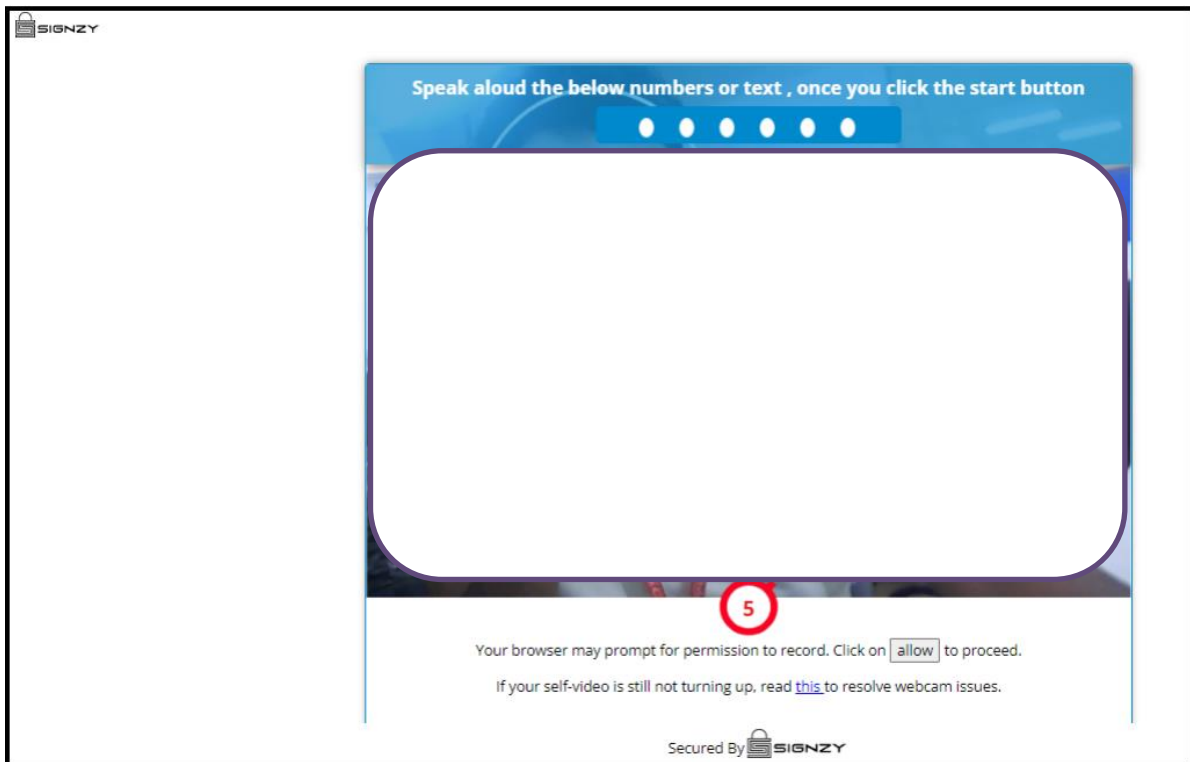
I/We wish to receive dividend / interest directly in my bank account as given below through ESC (ESC is mandatory for locations notified by SEBI from time to time)  Yes  No

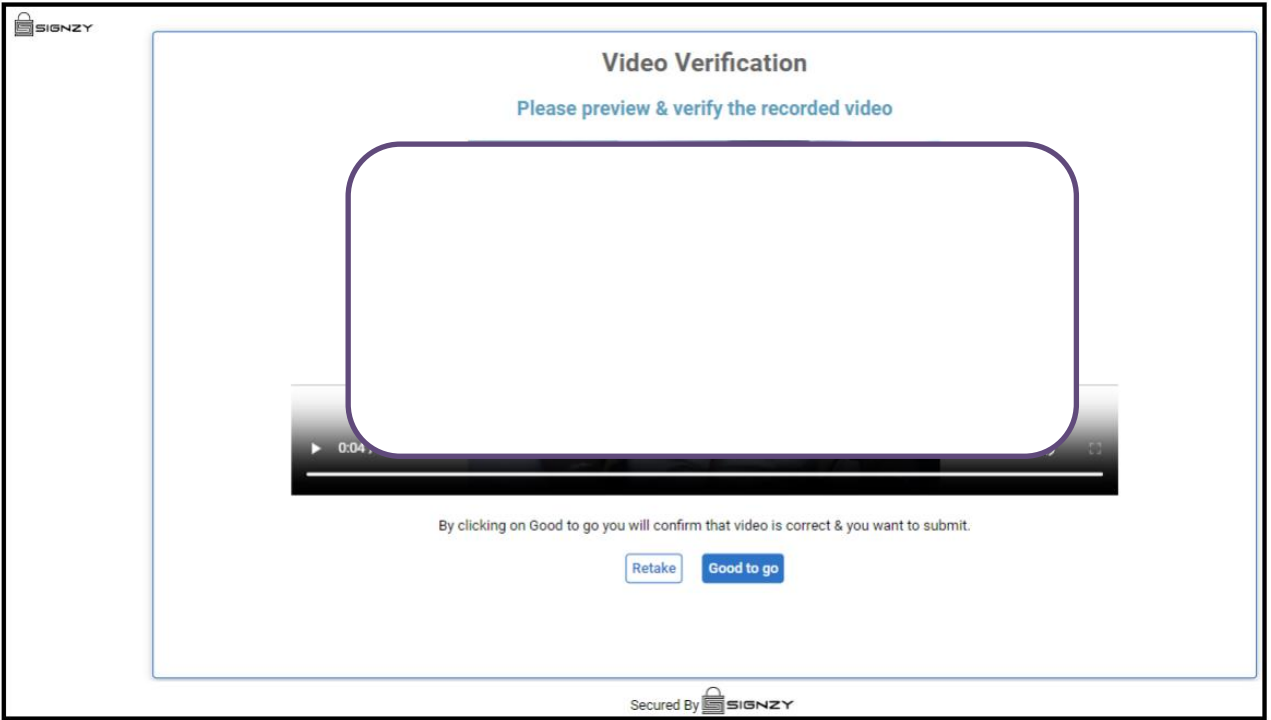
**Save & Proceed**

**Step 13:** If your documents are not fetched from Digilocker then you need to complete the IPV video verification. Click on **IPV button** (While taking IPV PAN card and Aadhar card should be handy with you).

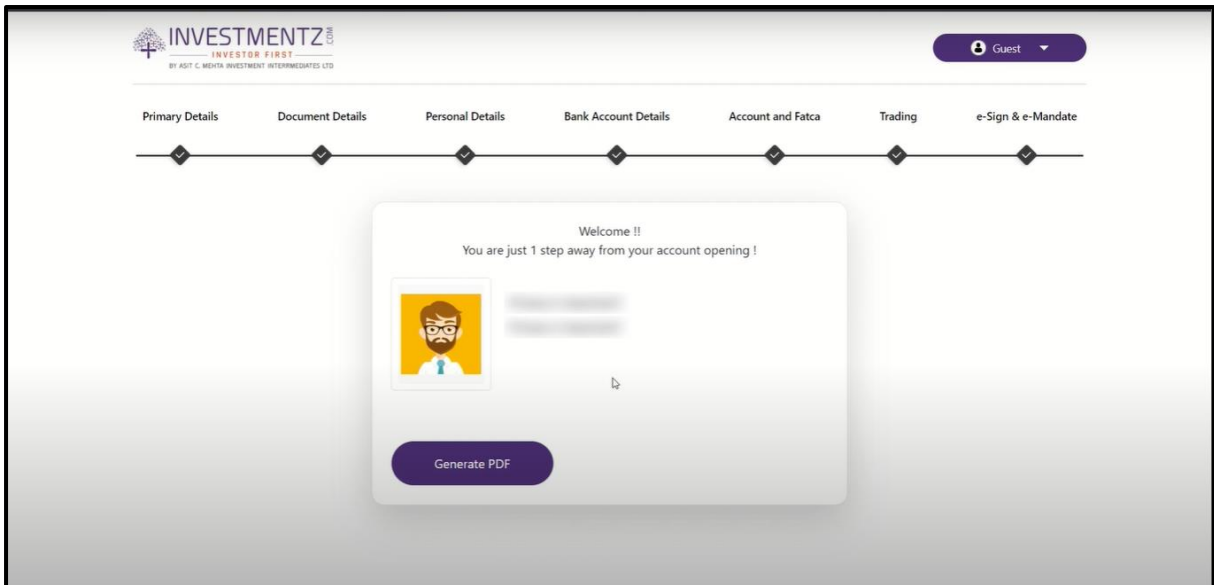


**Step 14:** Once you start the video you get the 6 digit number, while taking IPV you have to read the number loudly and show your PAN card and Aadhar card (Both Side). Once you are done with IPV click on **Continue**.





**Step 15:** Click on Generate PDF to proceed further.



**Step16:** Click on **Esign** button.

INVESTMENTZ.COM  
INVESTOR FIRST  
BY ASIT C. MEHTA INVESTMENT INTERMEDIATES LTD

Guest

Primary Details Document Details Personal Details Bank Account Details Account and Fatca Trading e-Sign & e-Mandate

Display PDF.

Select Esign verification type :

OTP  Biometric

Note : Keep aadhar card number, Virtual ID number handy. OTP will be on mobile number which is registered with your aadhar number.

Esign

**Step 16:** Enter your 12 digit Aadhar card number and click on **Send OTP** button, once you receive the OTP enter the OTP and click on **Verify OTP** button.

NSDL e-Gov IS NOW protean

Protean Electronic Signature Service

|                |  |
|----------------|--|
| ASP Name       | Asit C Mehta Investment Intermediates Ltd. |
| Transaction ID | UKC:eSign:8613:20220506164540709           |
| Date & Time    | 2023-05-06T16:45:46                        |

I hereby authorize Protean eGov Technologies Limited (Protean) to -

1. Use my Aadhaar / Virtual ID details (as applicable) for the purpose of e-Signing the Trading / Demat Account opening Documents for/with Asit C Mehta Investment Intermediates Ltd. and authenticate my identity through the Aadhaar Authentication system (Aadhaar based e-KYC services of UIDAI) in accordance with the provisions of the Aadhaar (Targeted Delivery of Financial and other Subsidies, Benefits and Services) Act, 2016 and the allied rules and regulations notified thereunder and for no other purpose.
2. Authenticate my Aadhaar / Virtual ID through OTP or Biometric for authenticating my identity through the Aadhaar Authentication system for obtaining my e-KYC through Aadhaar based e-KYC services of UIDAI and use my Photo and Demographic details (Name, Gender, Date of Birth and Address) for the purpose of e-Signing the Trading / Demat Account opening Documents for/with Asit C Mehta Investment Intermediates Ltd..
3. I understand that Security and confidentiality of personal identity data provided, for the purpose of Aadhaar based authentication is ensured by Protean and the data will be stored by Protean till such time as mentioned in guidelines from UIDAI from time to time.

VID/Aadhaar:

[Click Here](#) to generate Virtual ID.  
[Download Instructions](#) to generate Virtual ID in lieu of Aadhaar.

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**Step 17:** Click on “Click Here” link and generate the Digitally signed PDF for your reference. Your form submitted for verification. Contact us on 022-2858-4545 for more information.

