

# **Step 1 – Instigo Registration Page**

Clicking on the link, applicant lands on the Instigo registration page & the journey starts. Any value that is passed will be displayed in non-editable mode.

## New Registration

Please provide below details to start online KYC process

Email ID \*

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Please Enter Email Address

Mobile Number \*

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**GENERATE OTP**

The user will enter email address and mobile number. The user will click on generate OTP link. OTP will be sent to the entered mobile number

## New Registration

Please provide below details to start online KYC process

Email ID \*  
ss@gmail.com

Mobile Number \*  
7066016256

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OTP is sent on mobile number: **7066016256**

☆ OTP \*  
410323

Sending OTP in **21** Secs

Are you employee?  Yes  No

I am desirous of having account- ...[Read More](#)


**PROCEED**

## **Step 3 – PAN and KYC**


User will be come to the **PAN verification** page:

## PAN Verification

Let's verify your PAN

 PAN \*

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DOB as per PAN 

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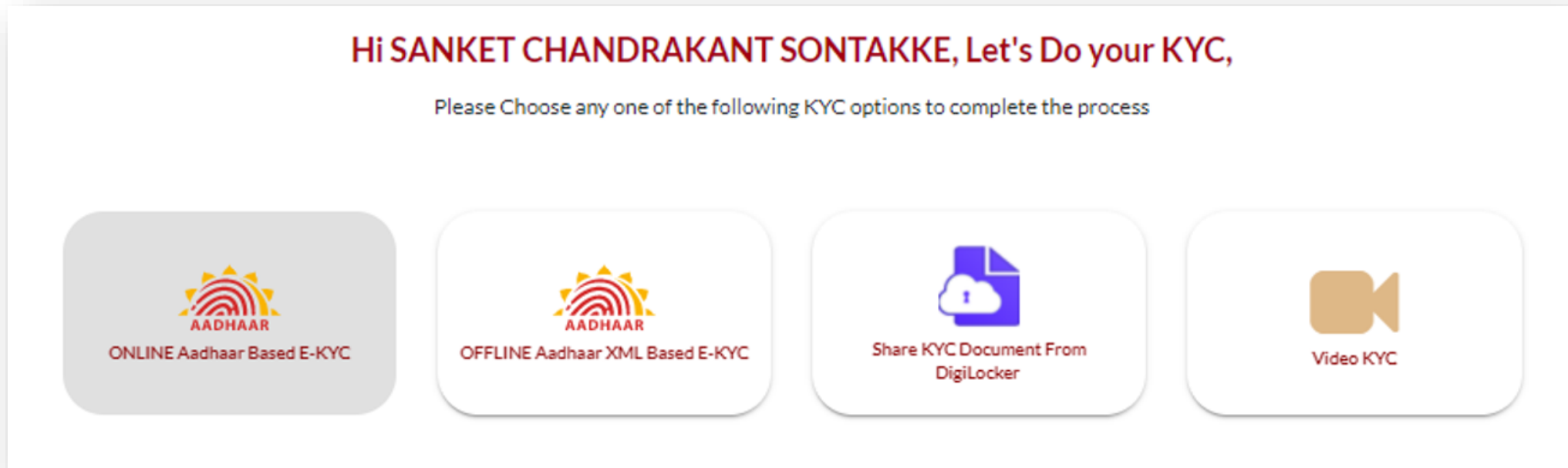
**NEXT**

When user enters PAN, same gets validated with ITD database and email verification mail will be sent on entered email ID.

PAN is verified and Email Verification link is sent to your email id. Please check your mail and click on the verification link to verify email id.

OK

Once user enters DOB and clicks next, PAN will be checked in KRA database. If a record is present in KRA, data will be downloaded in the backend and the user will be redirected to **KRA details page**. If user is not registered in KRA, user will be redirected to other KYC mode option.



There are 3 options available: Offline Aadhar XML, DigiLocker & Video KYC. Online – eKYC is only available to Sub KUA. If a mobile number is linked with Aadhaar, then the user can choose Offline Aadhaar based KYC or DigiLocker, otherwise the user has to go for Video KYC.

Each KYC journey is shown at the end of the page.

## Step 4 – KRA Details



Once user completes KYC, he/she will land on KRA details page:

### Additional KRA Details

Name as per PAN: SANKET CHANDRAKANT SONTAKKE [Name sequence is incorrect?](#)

<p><small>Nationality</small></p> <p>India</p>	<p><small>Residential Status</small></p> <p>Resident Individual</p>	<p><small>Marital status *</small></p> <p></p>	<p><small>Gender *</small></p> <p></p>
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Father's/Spouse Name:

<p><small>Select Name</small></p> <p>Father</p>	<p><small>Select Title *</small></p> <p>Mr.</p>
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<p><small>First Name *</small></p> <p></p>	<p><small>Middle Name</small></p> <p></p>	<p><small>Surname</small></p> <p></p>
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**PROCEED**

In Case of KRA KYC, fields will be auto populated except Father/Spouse flag and title. User will enter additional KRA details in casa of other KYC modes and click on next Button. User will see demat related details:

**Hi, MANMEET KAUR**  
Let's capture Demat details.

Basic Services Demat Account

SMS Alert Facility	<input checked="" type="radio"/> YES	<input type="radio"/> NO
Standing Instruction (SI)- To received credit automatically into my account	<input checked="" type="radio"/> YES	<input type="radio"/> NO
Auto Pledge Confirmation	<input checked="" type="radio"/> YES	<input type="radio"/> NO
Mode of receiving Rights and Obligation Document	<input checked="" type="radio"/> Electronic	<input type="radio"/> Physical
Mode of receiving Annual Reports, AGM notice and other communication from issue	<input checked="" type="radio"/> Electronic	<input type="radio"/> Physical
I wish to receive DIS booklet at the time of account opening	<input type="radio"/> YES	<input checked="" type="radio"/> NO
Mode of receiving account statement	<input checked="" type="radio"/> Electronic	<input type="radio"/> Physical
Account to operated through Power of Attorney (POA)	<input checked="" type="radio"/> YES	<input type="radio"/> NO
Online access to demat account	<input type="radio"/> YES	<input checked="" type="radio"/> NO

**PROCEED**

## **Step 5 – Personal & Financial Details**

After providing KRA details, user will land on personal and financial detail page:

## Hi SANKET CHANDRAKANT SONTAKKE,

Let's capture your personal details and financial details required for CKYC, PMLA and FATCA compliance

<input type="text" value="Country of Birth"/> India	<input type="text" value="KYC Identification Number"/>	<input type="text" value="Occupation *"/> Public Sector
<input type="text" value="₹ Gross Annual Income *"/>	<input type="text" value="₹ Networth as on date"/>	<input type="text" value="Place of Birth *"/>

Is your country of tax residency other than India?

Are you political Exposed Person (PEP)?

Basic Services Demat Account

Are you Relative of (PEP)?

Mother's Name:

<input type="text" value="Select Title"/> Mrs.	<input type="text" value="First Name *"/>	<input type="text" value="Middle Name"/>	<input type="text" value="Surname"/>
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[PROCEED](#)

User will enter all information required for CKYC, PMLA, FATCA and click proceed button.

## **Step 6 – Bank Details**

User will land on bank details page:

### Let's capture your Bank Details

You will receive all future pay-out of fund in this bank account with respect to these accounts.

<p><b>Bank Account Type *</b> Savings</p>	<p><b>IFSC Code *</b> HDFC0000002</p>
<p><b>Bank Name</b> HDFC BANK</p>	<p><b>Bank Branch</b> MUMBAI - KHAR (WEST)</p>
<p><b>Bank Address</b> SWAGATAM, OPP. KHAR POLICE STATION,S. V. ROAD, KHAR(WEST)MUMBAIMAHARASHTRA400 052</p>	
<p><b>Account Number *</b></p>	<p><b>Re-enter Account Number</b></p>

**VERIFY**

User will enter bank details and the same will get verified using penny drop. Also, the system will match name from bank to name from ITD/KYC (as per distributor selection) and will be displayed.

### Let's capture your Bank Details

You will receive all future pay-out of fund in this bank account with respect to these accounts.

Bank Account Type *	IFSC Code *
Savings	HDFC0000002
Bank Name	Bank Branch
HDFC BANK	MUMBAI - KHAR (WEST)
Bank Address	
SWAGATAM, OPP. KHAR POLICE STATION,S. V. ROAD, KHAR(WEST)MUMBAIMAHARASHTRA400 052	
Account Number *	Re-enter Account Number
●●●●●●●●●●	50100245520550

**VERIFY**

Name as per KYC	Name as per bank	
SANKET CHANDRAKANT SONTAKKE	SANKET SONTAKKE	Matched 52%

**NOT MY BANK ACCOUNT**      **PROCEED**

## **Step 7 – PMS Details**



After completion of bank details, user will be redirected to enter PMS details:

Capital Commitment

In Figures	<input type="text" value="0001234400"/>
In Words	<input type="text" value="Twelve Lakh Thirty Four Thousand Four Hundred Rupees"/>

Capital Contribution

Payment  I will do Payment Separately

Depository Account Details

Depository Participant Id	Depository Participant Name
<input type="text" value="112233"/>	<input type="text" value="Vikas Tawade"/>
Client Id	
<input type="text" value="11123123"/>	

Risk Profiling

Source Of Income \*

Salary

Source Of Wealth \*

Income from Property

Highest Education

Graduation

Mode Of Operation

Select an option \*

First Holder

Investment Experience in Capital Market

Yes  No

Are you required to deduct tax at source

Yes  No

Kindly select below, if your occupation type is Professional

Is Self Employed Professional

Select an option

CA

Line of Business/Industry

abc

PROCEED

# Step 8 – Mandatory Documents

After providing PMS details, user will upload mandatory documents.

**Hi SANKET CHANDRAKANT SONTAKKE, Let's click pictures / upload documents**


**Signature**  
Sign on white paper, take a picture and upload. Uploaded image should be properly visible.

Preview

Upload image in JPEG or .PNG format with less than 97 KB.

[CLICK PICTURE](#) [UPLOAD](#)

**Photo**  
Please show PAN Card and take photo. PAN card should not cover your face and clearly visible.



[CLICK PICTURE](#)

**PAN Card**  
Kindly upload SCAN image of ORIGINAL PAN (front Side) OR Take a picture of ORIGINAL PAN. DO NOT upload scan image or COPY of PAN

Preview

Upload image in JPEG or .PNG format with less than 2 Mb.

[CLICK PICTURE](#) [UPLOAD](#)

**Cancelled Cheque**  
Kindly upload SCAN image of ORIGINAL Cancelled Cheque OR Take a picture of ORIGINAL Cancelled Cheque Cheque should be personalised (i.e. should have name of applicant). DO NOT upload scan image or COPY of Cancelled Cheque

Preview


Upload image in JPEG or .PNG format with less than 2 Mb.

[CLICK PICTURE](#) [UPLOAD](#)

If Penny drop fails, only then upload of cancelled cheque is mandatory. Once user uploads all necessary documents successfully, user will see nomination option on this document upload page. User can provide nomination as follows:

### Bank Statement

Kindly upload Bank Statement of last one year.




000000026014\_Poa-protected.pdf  
Upload pdf with less than 20 Mb.

**UPLOAD**

### Cancelled Cheque

Kindly upload **SCAN** image of **ORIGINAL** Cancelled Cheque OR Take a picture of **ORIGINAL** Cancelled Cheque Cheque should be **personalised** (i.e. should have **name of applicant**). **DO NOT** upload scan image or **COPY** of Cancelled Cheque



Preview

Upload image in .JPEG or .PNG format with less than 2 Mb.

**CLICK PICTURE** **UPLOAD**

Nomination

I wish to make nomination.

I do not wish to make nomination.

When user clicks on **I wish to nominate**, the following screen will be displayed

### Nominee - Details 1

Nominee Name (As per PAN/KYC/Aadhar) * fdg	Share of each nominee <input type="checkbox"/> Equal	Share of each nominee %
Relationship with the applicant * fdg	Mobile/Telephone No. * Please enter mobile no.	Email ID *
Is Minor <input checked="" type="radio"/> Yes <input type="radio"/> No	Nominee Identification Details * Aadhaar	Aadhaar No *
Address of Nominee * dgfg		Pincode * 956354
Nominee Date of Birth *		

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### Guardian Details :

Name of Guardian (Mr./Ms.) *	Mobile /Telephone No. of Guardian *	Guardian Email ID *
Relationship Of Guardian with Nominee *	Guardian Identification Details *	

On completion of nomination, user will be redirected to summary page, to verify all entered data.

### Summary

Applicant Details		
Name as per ITD: SANKET CHANDRAKANT SONTAKKE	Name as per KRA/Aadhar/DigiLocker/Video KYC: SANKET CHANDRAKANT SONTAKKE	Name as per Bank: SANKET SONTAKKE
Basic Details		
Father/Spouse Name : Mr. Chandrakant Sontakke	Gender : Male	Date of Birth : 1989-06-17
Marital Status : Married	Nationality : India	Mobile Number : 7066016256
Occupation : Public Sector	Gross Annual Income : Btw Rs. 1 to Rs. 5 Lacs	Country of Birth : India
Networth as on date :	Mother's Name : Mrs. ashwini	Place of Birth : wada
KYC Identification Number :	Residential Status : Resident Individual	
Email Id : ss@gmail.com	✗ Not Verified	
<input type="checkbox"/> Is your country of tax residency other than India?	<input type="checkbox"/> Are you political Exposed Person (PEP)?	
<input type="checkbox"/> Basic Services Demat Account	<input type="checkbox"/> Are you Relative of (PEP)?	
Bank Details		
Account Number : 50100245520550	Branch Name : MUMBAI - KHAR (WEST)	Bank Name : HDFC BANK
Branch Address : SWAGATAM, OPP. KHAR POLICE STATION, S. V. ROAD.		

On completion of nomination, user will be redirected to summary page, to verify all entered data.

### Address Details

**Correspondence Address :**

Country : India	State : MAHARASHTRA	City : Vada
District :	Address : AGARALI WADA Thane - 421303	

**Permanent Address :**

Country : India	State : MAHARASHTRA	City : Vada
District :	Address : AGARALI WADA Thane - 421303	

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### Trading Details

Past Action By regulatory/statutory/other authority
  I wish to use my existing Demat Account

Trading Experience :  
0 to 1 Year

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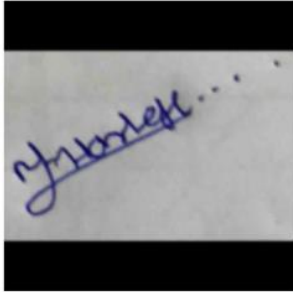
### Exchanges & Segment

BSE	<input type="checkbox"/> Equity	<input type="checkbox"/> Equity Derivatives	<input type="checkbox"/> Commodity	<input checked="" type="checkbox"/> Mutual Fund	<input type="checkbox"/> Currency Derivatives
MCX	<input type="checkbox"/> Commodity	<input type="checkbox"/> Equity	<input type="checkbox"/> Equity Derivatives	<input type="checkbox"/> Mutual Fund	<input type="checkbox"/> Currency Derivatives
MSE	<input type="checkbox"/> Equity	<input type="checkbox"/> Equity Derivatives	<input type="checkbox"/> Mutual Fund	<input type="checkbox"/> Currency Derivatives	<input type="checkbox"/> Commodity
NSE	<input type="checkbox"/> Equity	<input type="checkbox"/> Equity Derivatives	<input type="checkbox"/> Commodity	<input type="checkbox"/> Mutual Fund	<input type="checkbox"/> Currency Derivatives
ICEX	<input type="checkbox"/> Commodity	<input type="checkbox"/> Mutual Fund	<input type="checkbox"/> Currency Derivatives	<input type="checkbox"/> Equity	<input type="checkbox"/> Equity Derivatives
NCDEX	<input type="checkbox"/> Commodity	<input type="checkbox"/> Equity	<input type="checkbox"/> Equity Derivatives	<input type="checkbox"/> Mutual Fund	<input type="checkbox"/> Currency Derivatives




On completion of nomination, user will be redirected to summary page, to verify all entered data.


Signature




Photo




PAN Card



Cancelled Cheque




Correspondence Address Proof



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1. Please download complete application form.  
2. Review the details captured in the application form before confirming.  
3. Upon confirming you will be required to do eSign on the same.

 Download Application Form

**PROCEED**

User can download PDF on this page to preview the application form before eSign.

## Step 9 – eSign

After re-checking all entered data, user will land on eSign page

### Let's sign your Application

**eSign**

1. You will be redirected to NSDL eGovernance Infrastructure Limited website for eSigning.
2. For eSign you need to complete eKYC using Aadhaar details.
3. Upon completion of eKYC, UIDAI will share your basic details such as name, address, date of birth, gender, etc.
4. [Click here](#) to view the application before eSign.

[eSign with Aadhaar OTP](#)

**Is your Mobile not Linked with Aadhaar?**

1. Download account opening form by clicking below
2. Print downloaded form and sign it
3. Send it to below address:  
National Securities Depository Limited National Securities Depository Limited Trade World, A wing, 4th Floor, Kamala Mills Compound, Lower Parel, Mumbai – 400013

I wish to submit the physical copy of application after affixing ink signature

[Confirm & Download Application](#)

Users can perform eSign, if mobile number is linked to Aadhaar. Users will be redirected to the NSDL e-governance site to perform eSign. If the mobile number is not linked to Aadhaar, the user has to download an application form, sign physically and send it to the distributor's office.

**Step 10 –  
Congratulations**

After successful esign, user will reach on congratulations page

## **Congratulations**

Your Application has been Submitted Successfully

**Application Ref. No. 000000041219**