



Digital Account Opening

Journey View's

Desktop View



The desktop view of the Axis Direct website features a large banner with the text "Instantly Open Demat & Trading Account" and a background image of a bull and a bear. Below the banner is a call-to-action form for opening a demat account, which includes fields for a mobile number and email ID, a terms and conditions checkbox, and a "Open an Account" button.

AXIS DIRECT

Instantly Open Demat & Trading Account

Open Free* Demat Account!

Enter 10 Digit Mobile Number

Enter your valid Email ID

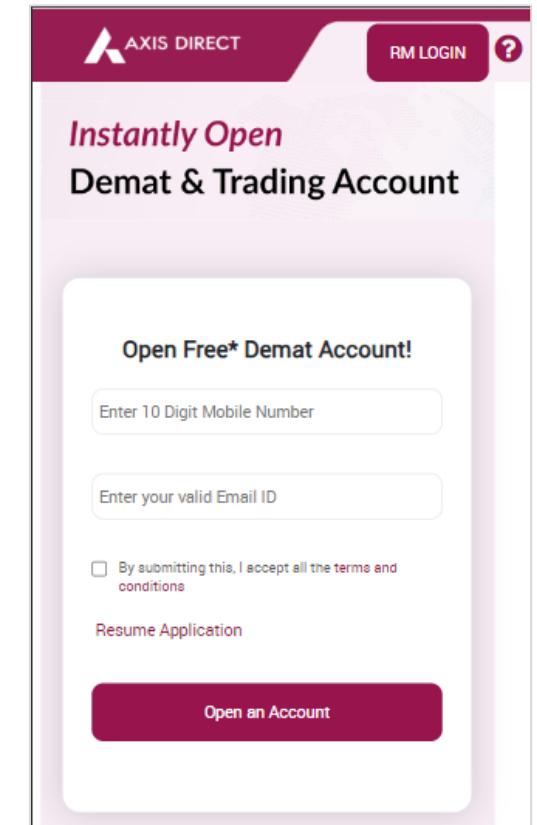
By submitting this, I accept all the terms and conditions

Resume Application

Open an Account

Need Assistance Click Here!

Mobile View



The mobile view of the Axis Direct website is a simplified version of the desktop view, designed for touchscreens. It features a large "Instantly Open Demat & Trading Account" banner and a call-to-action form for opening a demat account, which includes fields for a mobile number and email ID, a terms and conditions checkbox, and a "Open an Account" button.

AXIS DIRECT

Instantly Open Demat & Trading Account

Open Free* Demat Account!

Enter 10 Digit Mobile Number

Enter your valid Email ID

By submitting this, I accept all the terms and conditions

Resume Application

Open an Account

REGISTRATION



Pan Details Personal Details - A Personal Details - B Bank Details Make Payment Upload Document

Hi Sachin Neelamani Epili, I Am Delighted To Be Helping You Today.

Now, we will be verifying your KYC details. For that, I need your PAN and Date of Birth.

Note: Mobile number or email address should be updated in Aadhar for Instant activation. Not sure? [Click here](#)

Kindly note: The Digital Account Opening process is available for Resident Individual with Single holder only.

Name as per PAN Card:

Enter valid PAN no:

Date of Birth:

PROCEED TO PERSONAL DETAILS

User Assistance

1. Enter the name as per the Income Tax Records/Pan Card.
2. Enter a valid Pan Number.
3. Enter the correct DOB as per ITR/Pan Card.
4. After updating Pan & DOB, Pan-Site name and KRA & CKYC details check takes place.
5. If an existing account is found, then the system will not allow to initiate a new journey. It will ask you to log in to your existing account.
6. If there any existing application found, then it will be re-direct to last complete stage and from their need to complete the remaining Journey.

Note: If any existing application is found, then it will not allow to use DigiLocker.

Pan-Site Name Confirmation



As per Income Tax database, Your name is SACHIN NEELAMANI EPILI. Please note as per SEBI regulations, your trading account must be opened with name as per PAN card.

Cancel

Okay

User Assistance

- After entering valid PAN & DOB in the journey, Name will get fetched from Income Tax Database(Pan-Site Name).
- Click on **Okay** and continue the journey.
- If the name received from the Income Tax Database is Incorrect then click on **Cancel** and re-check the entered Pan number details.

Opting Digilocker (For Non KRA and CKYC Verified Customers)



AXIS DIRECT

Fetch your details and documents using DigiLocker.

What is DigiLocker?
DigiLocker is a government-provided platform for obtaining verified documents digitally.

Steps for Digilocker:

- Keep your Aadhar Number and mobile number linked with Aadhar handy.
- You will receive OTP on this number.
- If you haven't set up your DigiLocker PIN, create a 6-digit Digilocker PIN.
- If you forgotten your existing Digilocker Pin, click on "Forgot security PIN" on the DigiLocker KYC screen and create a new 6-digit PIN.

Issued Documents (3)

- Aadhaar Card (XX8101)
- Driving License (can be accessed)
- PAN Verification Record (XXK7589N)

Select all

If you do not wish to continue via DigiLocker, please proceed with the journey by entering your details and uploading the relevant documents. [Click here to Proceed](#).

I agree to the [Terms & Conditions](#) for opting Digilocker.

Proceed with Digilocker

User Assistance

- Post Pan-Site name confirmation, It will re-direct to opt for Digilocker Page.
- The user need to click on "**Proceed with Digilocker**" to continue the journey with Digi locker .
- If the user do not wish to continue with Digilocker then the user have to click on "**Click here to Proceed**" CTA, through which the user can continue the existing journey.
- On Left side, steps for opting **Digilocker** process available.

Note:

To opt for the Digi locker the user's Aadhaar number should be linked to the Mobile or Email ID.

Personal Details A (Profile A) – With KRA/CKYC Journey



Hurray! You are KRA and CKYC verified! I would still recommend that you glance through the details and proceed 😊

Name

First Name	Middle Name	Last Name
SACHIN	NEELAMANI	EPILI

Your Correspondence Address

Change Address

Your Address, Line 1

Address, Line 2

Address, Line 3

Address Type: Residential

Pincode: 421201

State: Maharashtra

District: Thane

City: DOMBIVLI

Your Country: India

If your address shown above is not the same as that of your current address, you can choose to import your details as present in your Aadhaar. To access data through DigiLocker, please ensure that you have access to your mobile number linked to Aadhaar.

[Get Details From DigiLocker](#)

Disclaimer

I wish to keep my permanent address same as correspondence address

[BACK TO PAN DETAILS](#) **CONFIRM & PROCEED**

User Assistance (KRA or CKYC Verified Customers)

1. Post successful PAN Site Name Verification, the application redirects to Personal Details A (Profile A) Section.
2. Under the Profile A, the customer can view the details fetched from KRA or CKYC services.
3. The Customer have an option to either complete the journey based on the details fetched from the KRA/CKYC services or complete the journey through Opting for Digilocker.
4. If the customer clicks on Confirm & proceed, the journey will continue along with the data fetched from KRA/CKYC Services.

Personal Details A (Profile A) - With Digilocker Journey



Hurray! You are KRA and CKYC verified! I would still recommend that you glance through the details and proceed 😊

Name

First Name	Middle Name	Last Name
SACHIN	NEELAMANI	EPILI

Your Correspondence Address

Change Address

Your Address, Line 1

Address, Line 2

Address, Line 3

Address Type: Residential

Pincode: 421201

State: Maharashtra

District: Thane

City: DOMBIVLI

Your Country: India

If your address shown above is not the same as that of your current address, you can choose to import your details as present in your Aadhaar. To access data through DigiLocker, please ensure that you have access to your mobile number linked to Aadhaar.

[Get Details From Digilocker](#)

Disclaimer

I wish to keep my permanent address same as correspondence address

[BACK TO PAN DETAILS](#) [CONFIRM & PROCEED](#)

If a KRA Verified customer wishes to open an Digital Trading and Demat account using Digilocker then he/she can click on opt for Digilocker and complete the digital journey.

User Assistance (KRA or CKYC Verified Customers)

1. Post successful PAN Site Name Verification, the application redirects to Personal Details A (Profile A) Section.
2. Under the Profile A, the customer can view the details fetched from KRA or CKYC services.
3. The Customer have an option to either complete the journey based on the details fetched from the KRA/CKYC services or complete the journey through Opting for Digilocker.
4. If the customer clicks on Confirm & proceed, the journey will continue along with the data fetched from KRA/CKYC Services.

DigiLocker Authentication (New to Digilocker A/c)



Sign up
It takes just a minute

Enter your Aadhaar Number 

DigiLocker uses Aadhaar to enable authentic document access

Next

[Try another way](#)

Verify Aadhaar OTP
UIDAI has sent a temporary OTP to your mobile ending in *****4115(valid for 10 mins).

Please enter OTP to complete verification

Didn't receive OTP? Wait few minutes for the OTP to arrive. Do not refresh or close!

Submit

[Didn't get the OTP? Resend OTP](#)

Set Your Security PIN
6 digit PIN provides extra security to your account with two factor authentication.



Done

Please provide your consent to share the following with **Axis Securities Digilocker Services**:

Issued Documents (3)
Aadhaar Card (XX0375)
Driving License (can be accessed)
PAN Verification Record (XXE4083B)

DigiLocker Drive

Profile information
Name, Date of Birth, Gender

Get your Email
Not available

Get your care of person name

Get your address

Get your address

Get your profile picture

Consent validity date (Today +30 days)
10-January-2024 

Purpose
Know Your Customer 

Consent validity is subject to applicable laws.
By clicking 'Allow', you are giving consent to share with **Axis Securities Digilocker Services**.

Deny **Allow**

Digilocker Authentication

- Once the page re-directed to Digilocker, Enter the 12 digit Aadhaar Card number.
- Enter the OTP received from Aadhaar.
- Enter the 6 digit Digilocker Security Pin.
- In the consent page, click on Select all option of **Issued documents**. Make Sure Aadhaar option is selected then click on "Allow".
- Click on Allow on the next screen to allow "**Axis Securities Limited**" to get the details and documents from "**Digilocker Service**".

Note:

- The customer who don't have digilocker account, they need to generate a 6 digit security Pin while processing with Digilocker.
- For Existing Customer, they have to enter their 6 Digit Digilocker Pin. If Pin is forgot then can be reset by clicking on **Forgot Pin?**

DigiLocker Authentication (Existing to Digilocker A/c)



Sign up
It takes just a minute

Enter your Aadhaar Number 

DigiLocker uses Aadhaar to enable authentic document access

Next

[Try another way](#)

Verify Aadhaar OTP
UIDAI has sent a temporary OTP to your mobile ending in *****4115(valid for 10 mins).

Please enter OTP to complete verification

Didn't receive OTP? Wait few minutes for the OTP to arrive. Do not refresh or close!

Submit

[Didn't get the OTP? Resend OTP](#)

You are already registered with DigiLocker
6 digit PIN provides extra security to your account with two factor authentication. Don't disclose your Security PIN to anyone.

Please enter your 6 digit Security PIN to Signin

[Forgot my PIN](#)

Done

Please provide your consent to share the following with **Axis Securities Digilocker Services**:

Issued Documents (3)
Aadhaar Card (XX0375)
Driving License (can be accessed)
PAN Verification Record (XXE4083B)

DigiLocker Drive

Profile information
Name, Date of Birth, Gender

Get your Email
Not available

Get your care of person name

Get your address

Get your address

Get your profile picture

Consent validity date (Today +30 days)
10-January-2024 [Edit](#)

Purpose
Know Your Customer

Consent validity is subject to applicable laws.
By clicking 'Allow', you are giving consent to share with **Axis Securities Digilocker Services**.

Deny **Allow**

Digilocker Authentication

- Once the page re-directed to Digilocker, Enter the 12 digit Aadhaar Card number.
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- Click on Allow on the next screen to allow "**Axis Securities Limited**" to get the details and documents from "**Digilocker Service**".

Note:

- The customer who don't have digilocker account, they need to generate a 6 digit security Pin while processing with Digilocker.
- For Existing Customer, they have to enter their 6 Digit Digilocker Pin. If Pin is forgot then can be reset by clicking on **Forget Pin?**

Allow **Deny**

PROFILE B



Nationality

Personal Details

Financial Details

Nomination details

Disclaimers

I am an Indian citizen & pay taxes in India, I do not pay taxes in USA or any other country.

I Accept all the preferences set by AxisDirect.

E-Margin Facility & Rights

[BACK TO PERSONAL DETAILS - A](#)

[PROCEED TO BANK DETAILS](#)

User Assistance

1. Personal details such as Gender, Father's name will be fetched from KRA service. (if opted for Digilocker then if the data received from Digilocker then it will be pre-filled if not then need to enter manually)
2. All the Mandatory field needs to be updated.
 - i. Personal Details like- Father's/Spouse Name, Mother's Name, Email ID & Mobile Number & Education details.
 - ii. Financial Details like Income, occupation & Trading Experience.
3. Verify the Email ID mentioned in Personal details using OTP or link received on the mail.
4. Nomination can be opt or opted out.

BANK

I will require your bank account details to enable seamless investing experience

Bank Name:

AXIS BANK

IFSC code:

Enter IFSC Code

Bank Account Number:

Enter Bank Account Number

Confirm Bank Account Number:

Confirm Bank Account Number

[BACK TO PERSONAL DETAILS](#)

PROCEED

User Assistance

1. Select the Bank Name from the drop down given.
2. As per the Bank Selected, update IFSC code of Bank. (IFSC Code is a Branch code of any Bank Branch. Which can be found from Passbook/Statement/Cheque.)
3. Enter the Active Bank Account Number.
4. Re-enter the Bank Account details and confirm it.

PRODUCT

Please select plan to proceed...



PROSPERITY



AXIS DIRECT NOW OR NEVER 5555 PLAN

AXIS DIRECT INVESTMENT PLUS AP1500 PLAN



Plan Details

- ✓ Zero Demat AMC for the first year ✓ Equity, Mutual Funds, IPO, Bonds, Insurance all under one roof
- ✓ Multi-channel trading platforms ✓ Seamless trading experience with 3in1 account

Brokerage & Account Opening Charges

Account Opening Charges: NIL

Plan	Cash/Emargin Product (Each Leg)	Intraday/Cover Product (Each Leg)
PROSPERITY	0.5%	0.05%
Future (Each Leg)	Equity Option	Commodity & Currency Option (Each lot/Leg)
0.05%	₹ Rs. 20/- per order	₹ 10/- per lot

1) Options Rs.20 per order will be applicable only for self generated trades through online platforms.

Read Terms & Conditions Carefully, [Click Here](#)

User Assistance

1. Select the Plan. (Basic or Subscription Plans)
2. As per the Plan selected details will be shown below.
3. Select the Trading segment offered by Axis Direct.
4. As per the selected plan complete the payment and move to the next stage.
5. AOC is waived off for the Basic (Prosperity) Plan and Freedom Plan.

Trading segment

Equity i

Mutual Funds

SLB

ASL will levy processing fees at 10 % of the Transaction Rate / lending and borrowing fee for SLB Segment

Derivatives - All

Equity Derivatives i

Commodity Derivatives i

Currency i

Note: While we are registered with multiple exchanges, we are not operational / offering services in MSEI Exchange, BSE Derivatives (Equity/Currency/Commodities), BSE SLBM, Debt and NSE Commodity Derivatives. We will keep you posted incase of any change.

Assisted Codes

[BACK TO BANK DETAILS](#)

[PROCEED TO DOCUMENT UPLOAD](#)

DOCUMENTS UPLOAD (KRA/CKYC Verified)

Name on the proof uploaded should match the name on the PAN Card UPLOAD DOCS USING MOBILE

PAN Card	Sample PAN card	VIEW Allowed Extn : jpeg and png.
Name on the PAN Card image should match the name received from the PAN Site		

Signature	Sample signature	UPLOAD Allowed Extn : jpeg and png.

Selfie Photo	Sample selfie photo	TAKE SELFIE Allowed Extn : jpeg and png.

Cancelled cheque (Personalised cancelled cheque image alongwith signature)	Sample cancelled cheque	UPLOAD Allowed Extn : jpeg and png.

Correspondence Address	Sample document	VIEW FRONT Allowed Extn : jpeg and png.
Aadhar		
Upload clear copy of front & back images to avoid rejections		

I Agree to the Terms & Conditions and Axis Bank Mandate Letter

I hereby give my consent to execute DDPI towards my demat account for the purpose of meeting Stock Exchange Obligations. [Read More](#)

PROCEED

User Assistance

1. All Mandatory documents need to uploaded manually in the journey. Documents Such as:
 - Identity Proof (PAN Card Only)
 - Signature
 - Live Selfie
 - Bank Document(Passbook/Statement/ Personalized Cheque)
 - F&O Document (Only if opted for derivatives)
 - Address Proof (Aadhaar Card/Voter ID/Driving License/Passport)

Note:

- i. Document size should be less than 4 MB.
- ii. Only .jpeg & .png images are allowed.

DOCUMENTS UPLOAD (Digilocker Journey)

Name on the proof uploaded should match the name on the PAN Card UPLOAD DOCS USING MOBILE

PAN Card Sample PAN card VIEW
Allowed Extn : jpeg and png.

Name on the PAN Card image should match the name received from the PAN Site

Signature Sample signature UPLOAD
Allowed Extn : jpeg and png.

Selfie Photo Sample selfie photo TAKE SELFIE
Allowed Extn : jpeg and png.

Cancelled cheque Sample cancelled cheque UPLOAD
Allowed Extn : jpeg and png.
(Personalised cancelled cheque image alongwith signature)

Correspondance Address Sample document VIEW FRONT
Allowed Extn : jpeg and png.

Aadhar Upload clear copy of front & back images to avoid rejections

I Agree to the Terms & Conditions and Axis Bank Mandate Letter

I hereby give my consent to execute DDPI towards my demat account for the purpose of meeting Stock Exchange Obligations. [Read More](#)

PROCEED

User Assistance

1. The PAN image will fetch from Digilocker, if available in the Digilocker. If not available in Digilocker then the customer will have to upload the same.
2. E-Aadhaar document will be fetched from the Digi Locker Service.
3. As per our existing digital account opening journey, the customer have to upload other mandatory documents. Such as:
 - Signature
 - Live Selfie
 - Bank Document(Passbook/Statement/ Personalized Cheque)
 - F&O Document (Only if opted for derivatives)

Note:

- i. Document size should be less than 4 MB.
- ii. Only .jpeg & .png images are allowed.

PREVIEW PDF

CENTRAL KYC REGISTRY

Know Your Customer (KYC) Application Form for Individual



WB2502800


AXIS DIRECT
View KYC Status

Primary Applicant

Prefix
First Name
Middle Name
Last Name

Name (Same as ID proof)

Maiden Name (If any)

Father/Husband Name

Mother Name

Passport Expiry Date

Required if Passport provided as Identity/Address Proof

Driving License Expiry Date

Required if Driving License provided as Identity/Address Proof

Occupation Type
 Private Sector
 Public Sector
 Government Sector
 Business
 Professional

ESIGN AND ACTIVATE INSTANTLY

I Agree to the Terms & Conditions and Axis Bank Mandate Letter

I hereby give my consent to execute DDPI towards my demat account for the purpose of meeting Stock Exchange Obligations. [Read More](#)

Documents will be processed with filling the application

PROCEED

User Assistance

1. Below of Barcode reference number represent the Application number of the customer.
2. Scroll down to check the filled data.
3. If any changes required, then go back and update the details and documents.
4. If no changes then click on ESIGN AND ACTIVATE INSTANTLY and proceed for Esign Application.

Note:

Documents received from Digilocker can not be edited/removable.

ESIGN



Protean Electronic Signature Service

ASP Name	Axis Securities Limited
Transaction ID	450cad4d-8ed8-44f8-b1b3-6e414309c042
Date & Time	2023-05-29T17:47:50

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

1. Use my Aadhaar / Virtual ID details (as applicable) for the purpose of digitally signing of documents for account opening for/with Axis Securities Limited 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 digitally signing of documents for account opening for/with Axis Securities Limited.
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.

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

Send OTP
Cancel

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User Assistance

1. Click on the checkbox below Date & Time.
2. Enter the Aadhar or VID number which is available on the Aadhar document.
3. After entering Aadhar/VID number, successfully OTP triggered on Aadhar Registered Mobile Number & Email ID.
4. Enter the received OTP and validate the same.
5. After successful authentication, it will re-direct to Thank you Page.

ESIGN

Protean Electronic Signature Service

ASP Name	Axis Securities Limited
Transaction ID	450cad4d-8ed8-44f8-b1b3-6e414309c042
Date & Time	2023-05-29T17:47:50

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

1. Use my Aadhaar / Virtual ID details (as applicable) for the purpose of digitally signing of documents for account opening for/with Axis Securities Limited 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 digitally signing of documents for account opening for/with Axis Securities Limited.
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.

Enter OTP  Verify OTP Cancel

Success! otp sent on registered mobile/email id.

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

©2021 Protean eGov Technologies Limited All rights reserved.

User Assistance

1. After entering Aadhar/VID number, successfully OTP triggered on Aadhar Registered Mobile Number & Email ID.
2. Enter the received OTP and validate the same.
3. After successful authentication, it will redirect to Thank you Page.

THANK YOU

Congratulations! You have now completed your application to open a demat and trading account!

Your application number is **WB2502800**

Please refer to this application number for all your future communications with us.

What's Next?

Your application's scrutiny will take a maximum of 3 working days and you will be informed via mail on the successful activation of your account or if a discrepancy needs to be cleared.

In the mean time, you can explore the wide range of offerings provided by Axis Direct by visiting our website, or know better about our products by visiting our [FAQs section](#)

[GO TO AXISDIRECT HOMEPAGE](#)

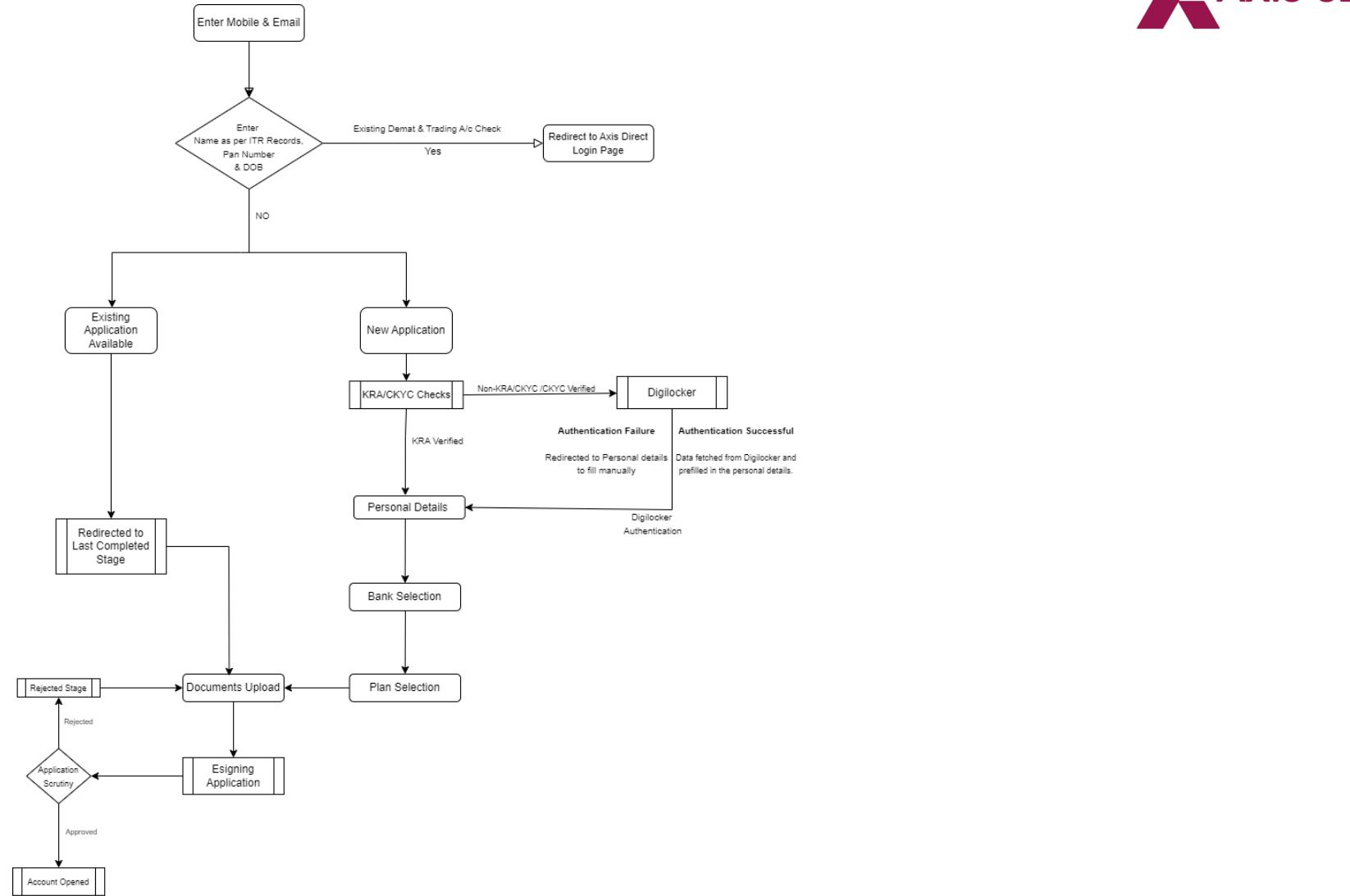
User Assistance

1. After a successful Aadhar authentication it will re-direct to Thank You.
2. After reaching to Thank You Page journey will be completed.

Brokerage Plans

Axis Direct Brokerage Plans					
	Basic (Prosperity Plan)	Investment Plus Plan	Now or Never Plan	Premium Investment Plus	Freedom Plan (Only Applicable to Axis Bank Customers)
Account Opening Charges	Nil	Nil	Nil	Nil	Nil
Subscription Charges	NA	Rs. 1,500 +GST	Rs. 5,555+GST	Rs. 10,000+GST	NA
Complimentary Delivery Turnover	-	Rs. 3 Lakhs	Rs. 12 Lakhs	Rs. 25 Lakhs	Based on the Funds Credited
Complimentary Delivery Turnover Validity	-	12 Months	12 Months	12 Months	3 Months
Brokerage Plan Validity	NA	1 Year	10 Years	1 Year	NA
Intra day & Futures Rates	0.05%	0.035%	0.02%	0.01%	0.04%
Delivery Rates	0.50%	0.35%	0.20%	0.10%	0.40%
Option Rates (Online)	Rs. 20 Per Order	Rs. 20 Per Order	Rs. 20 Per Order	Rs. 20 Per Order	Rs. 20 Per Order
Option Rates (Offline)	Rs. 10 Per Lot	Rs. 10 Per Lot	Rs. 10 Per Lot	Rs. 10 Per Lot	Rs. 10 Per Lot
Auto Renewal	-	Yes	No	Yes	Yes

Flowchart



Thank You