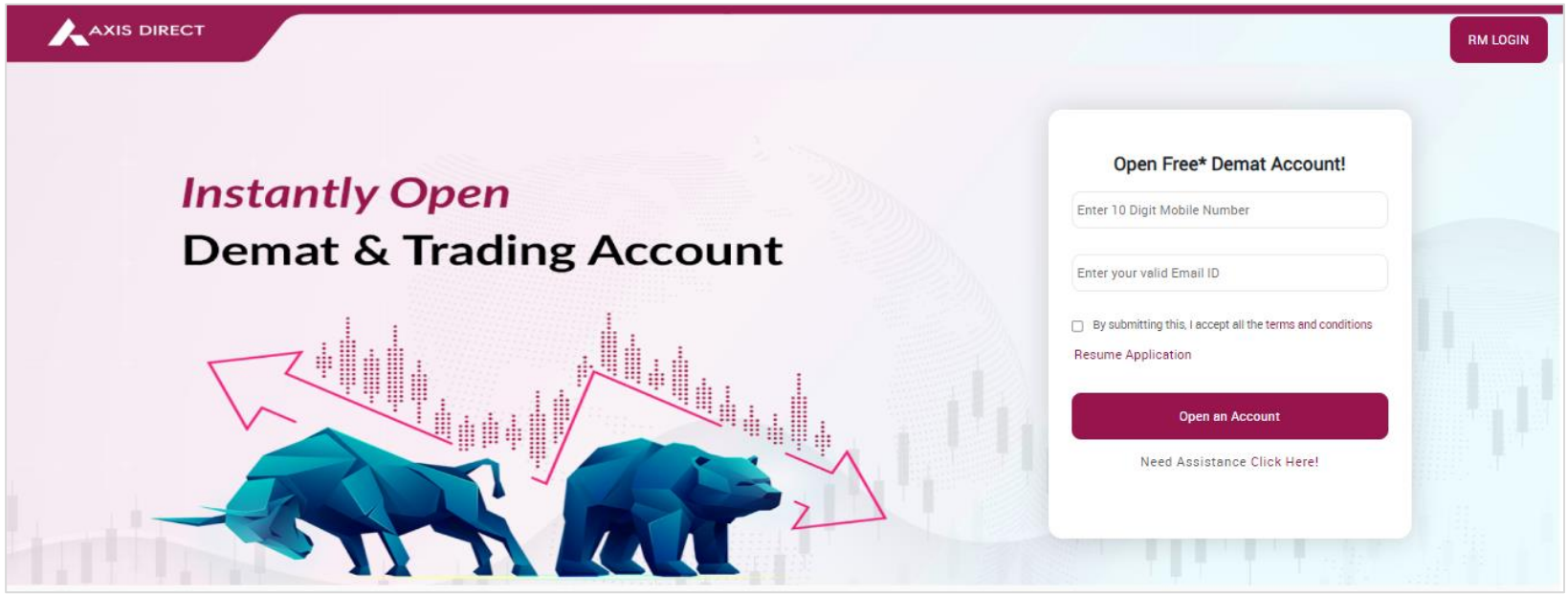
Digital Account Opening

AXIS SECURITIES

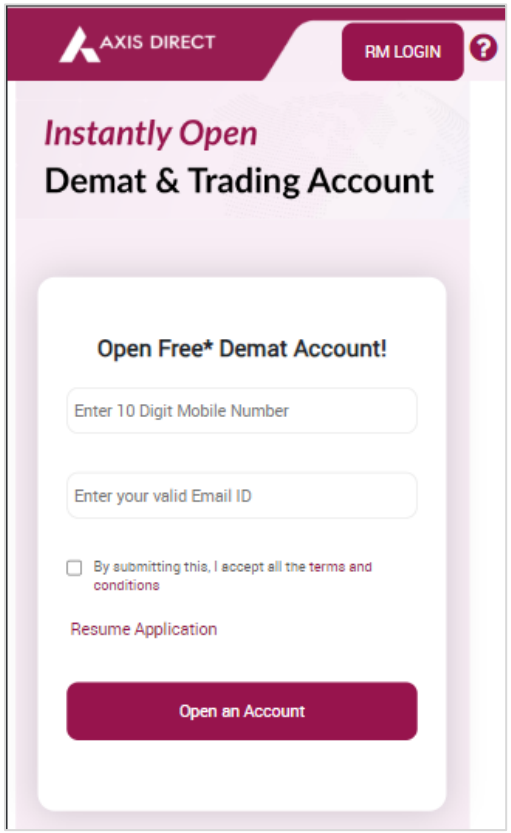
Journey View's

AXIS SECURITIES

Desktop View

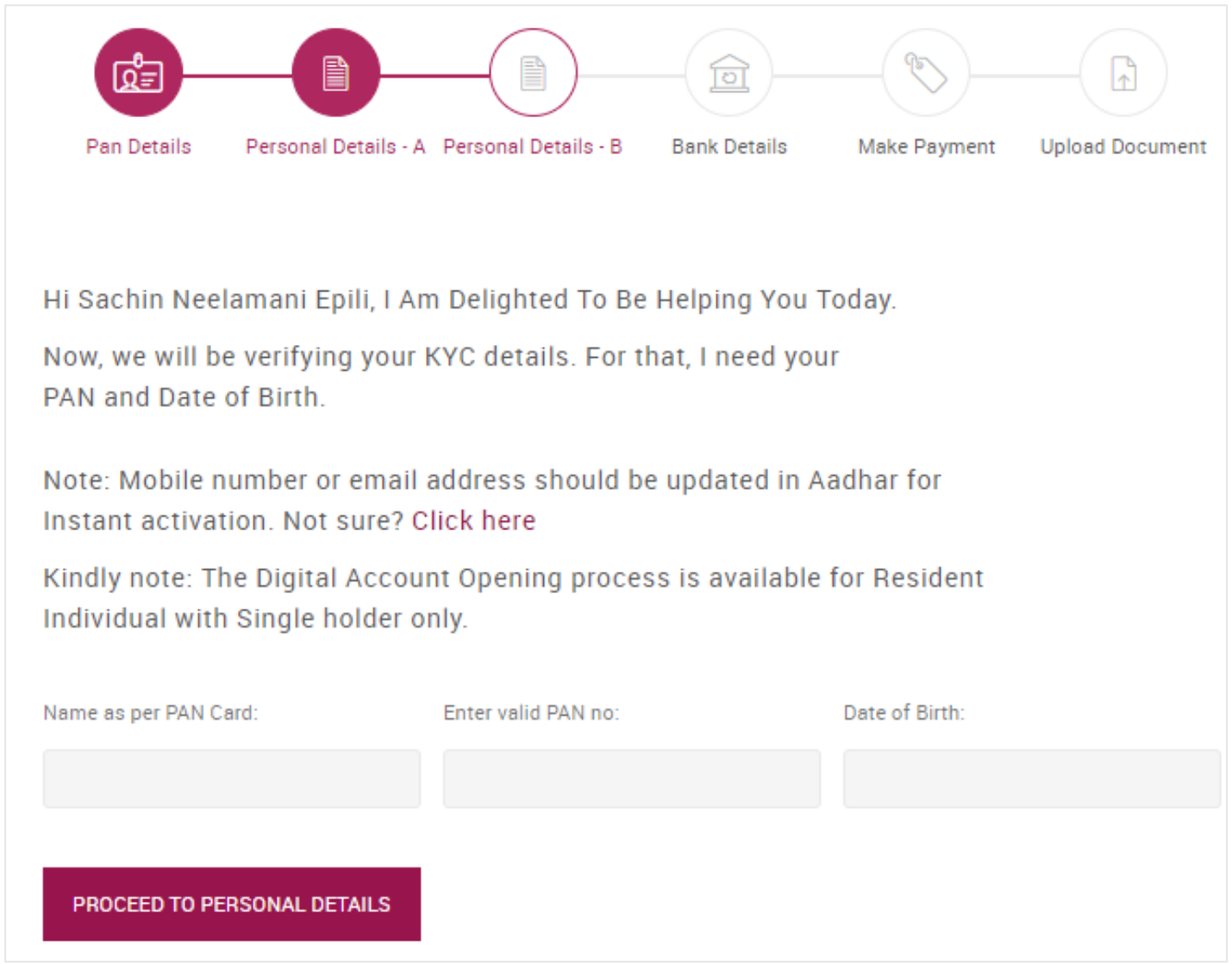


Mobile View



REGISTRATION

AXIS SECURITIES

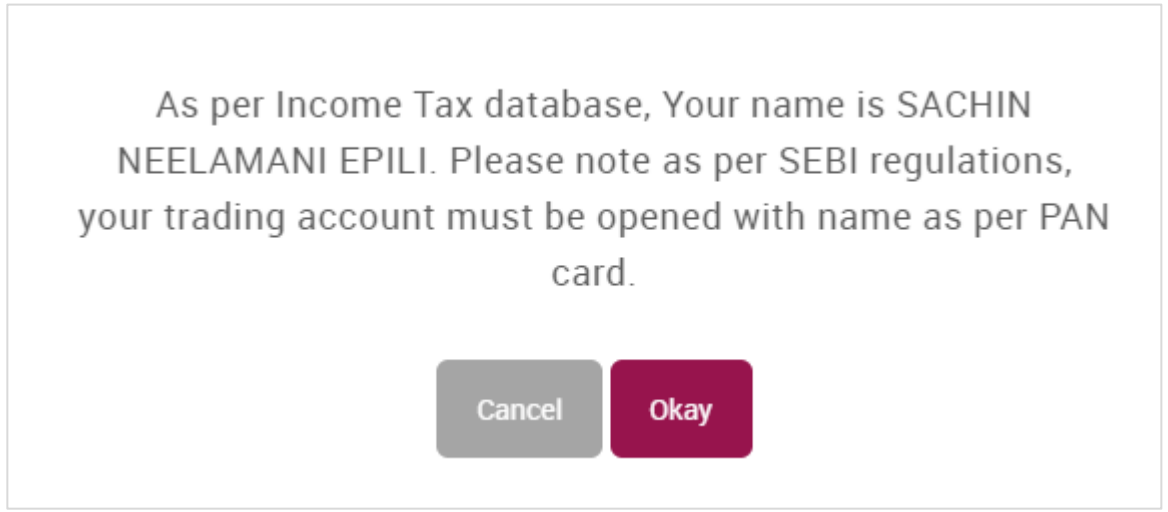


User Assistance

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

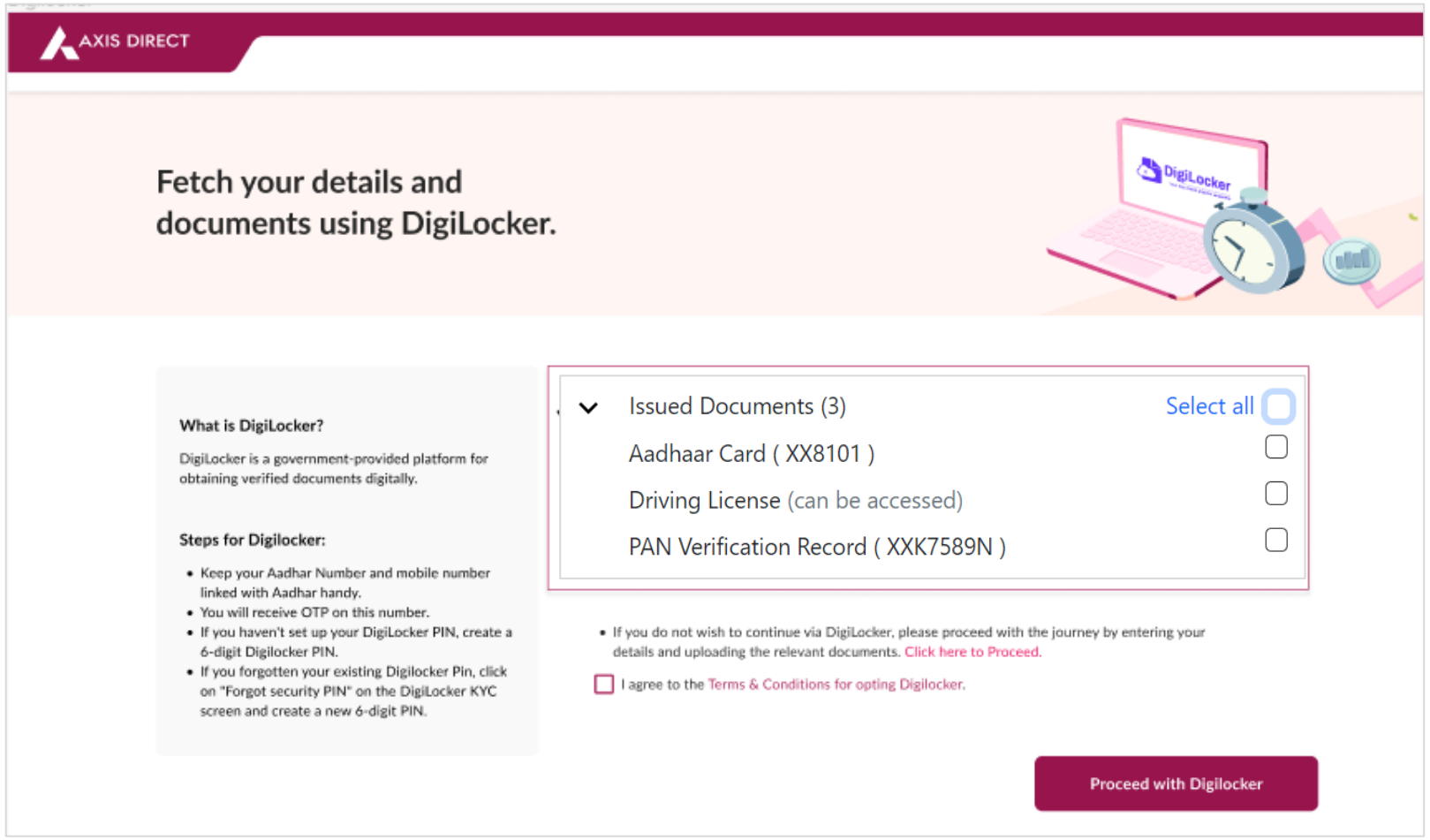


User Assistance

- 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 SECURITIES



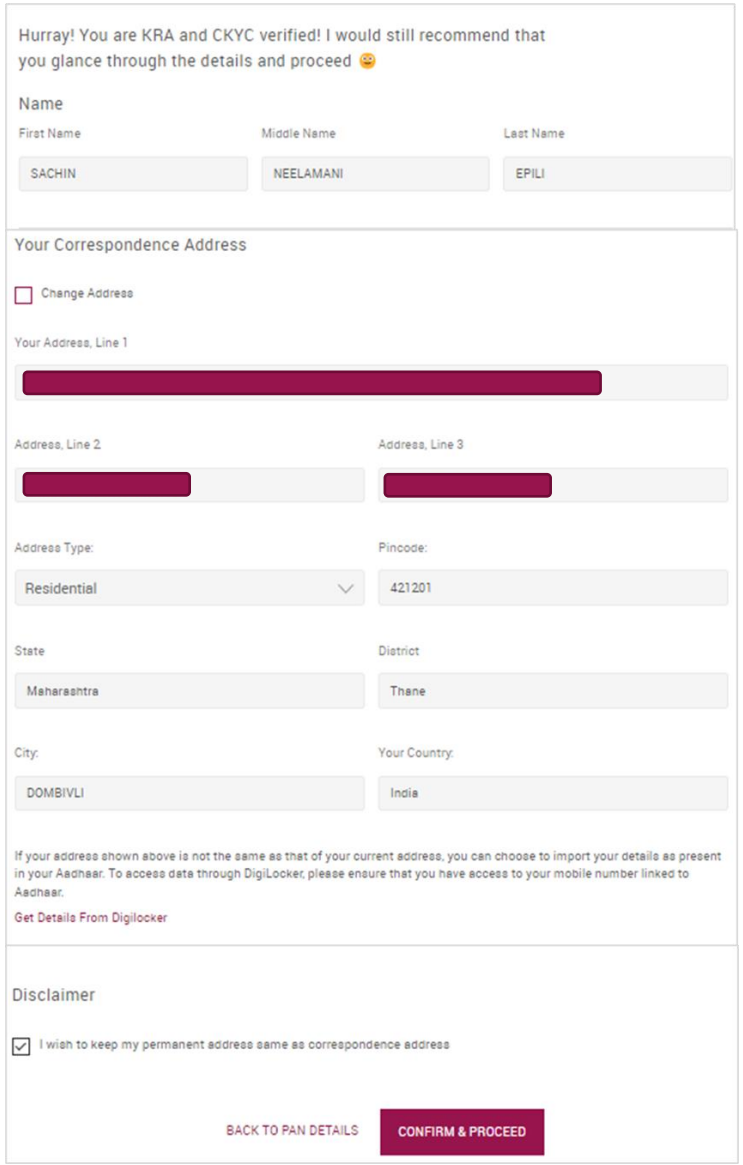
User Assistance

1. Post Pan-Site name confirmation, It will re-direct to opt for Digilocker Page.
2. The user need to click on "**Proceed with Digilocker"** to continue the journey with Digi locker .
3. 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.
4. 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.

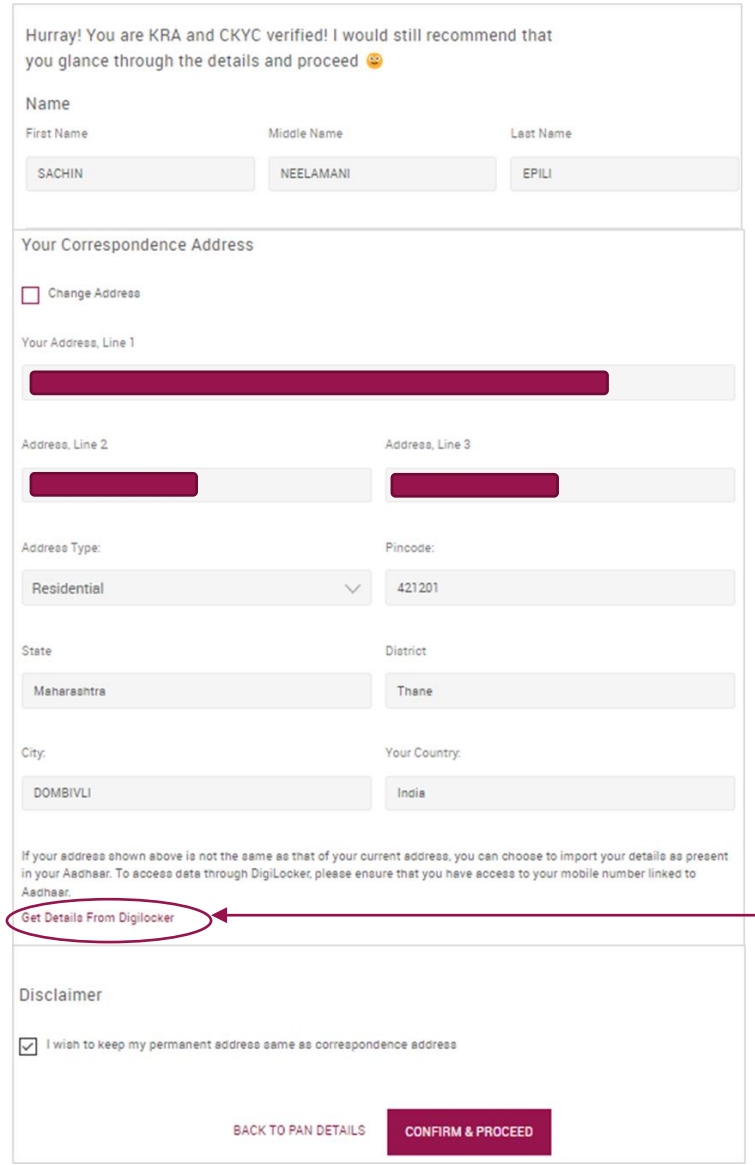
Personal Details A (Profile A) – With KRA/CKYC Journey



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



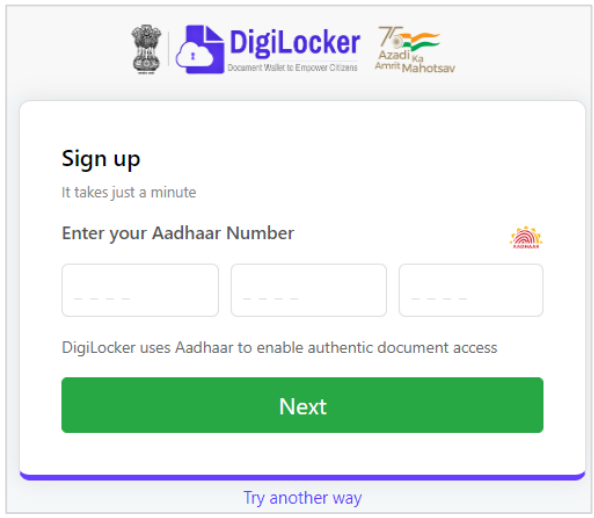
If a KRA Verified customer wishes to open an Digital Trading and Demat account using Digilocker then he/she can click on opt for Digilocker and complete the digital journey.

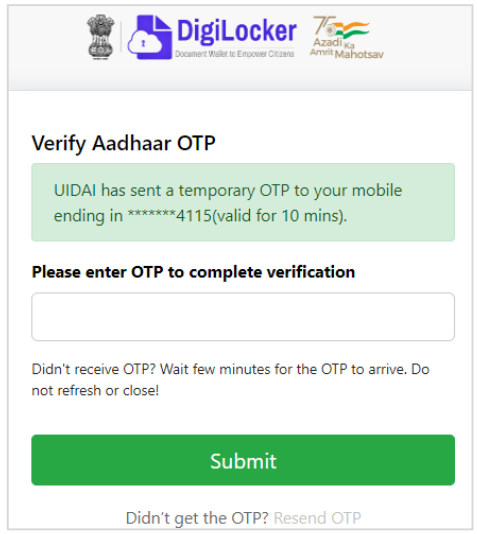
User Assistance (KRA or CKYC Verified Customers)

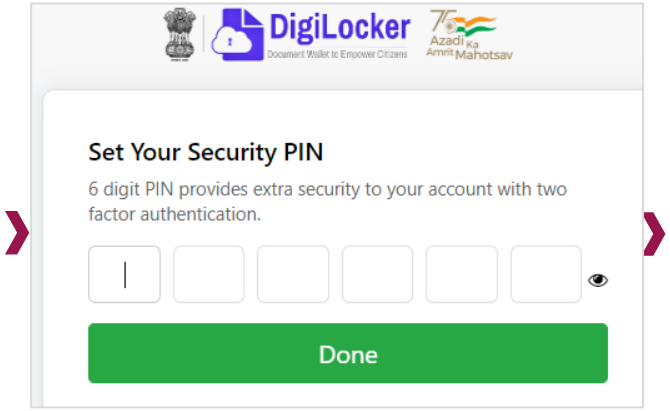
1. Post successful PAN Site Name Verification, the application redirects to Personal Details A (Profile A) Section.
2. Under the Profile A, the customer can view the details fetched from KRA or CKYC services.
3. The Customer have an option to either complete the journey based on the details fetched from 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.

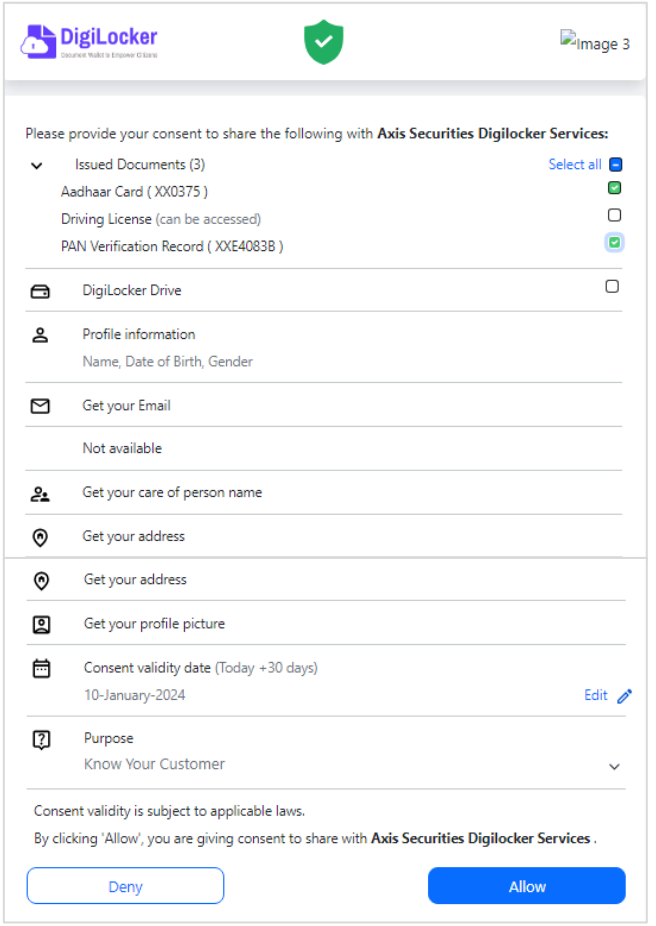
DigiLocker Authentication (New to Digilocker A/c)

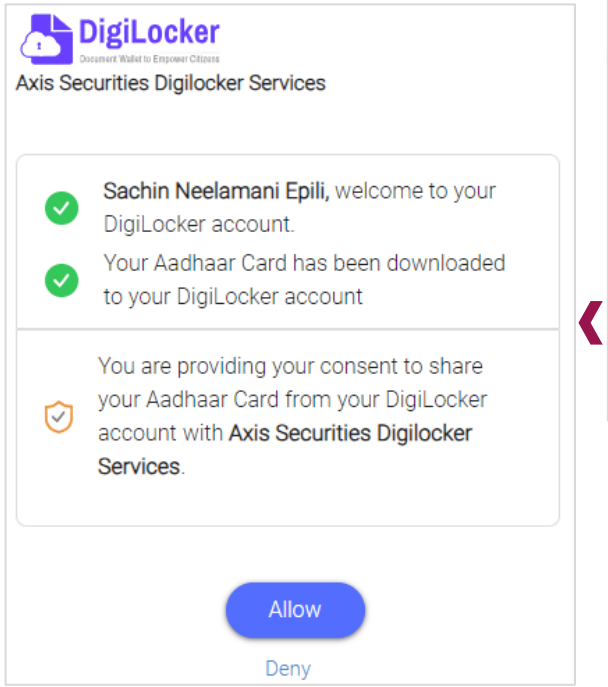
AXIS SECURITIES











Digilocker Authentication

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

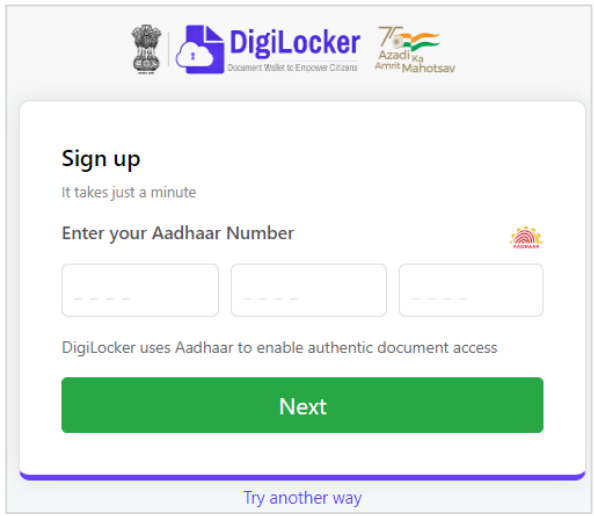
Note:

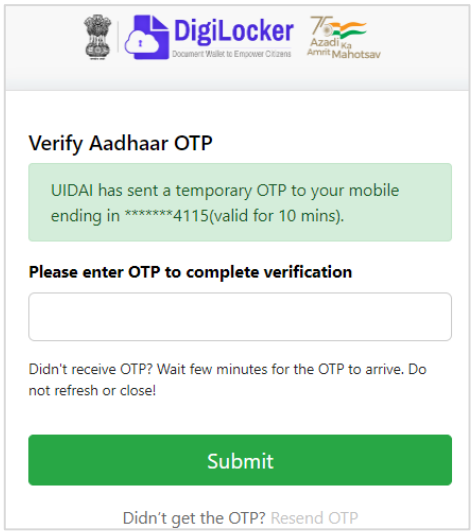
i. The customer who don't have digilocker account, they need to generate a 6 digit security Pin while processing with Digilocker.

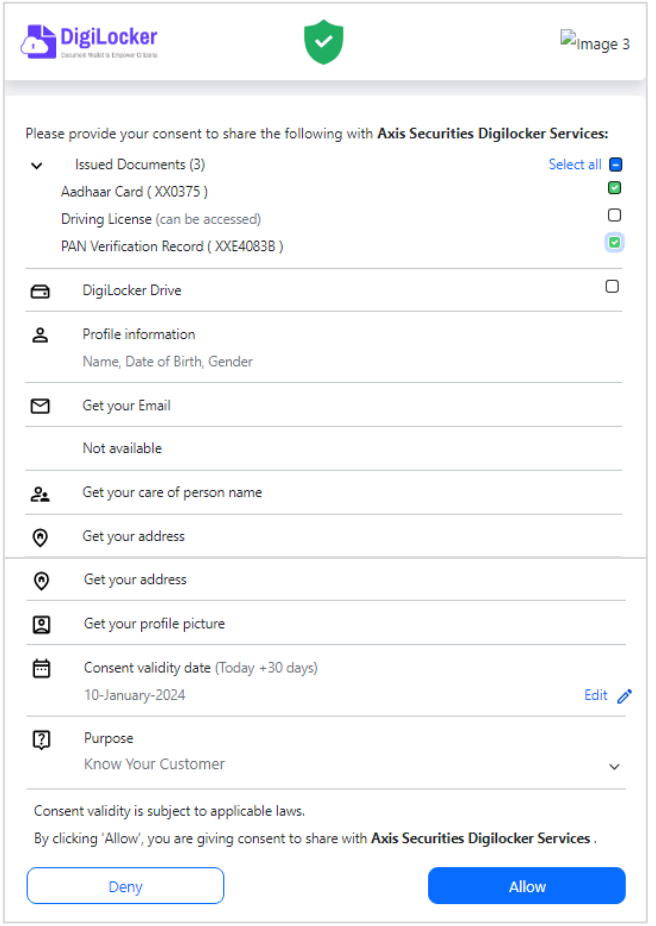
ii. For Existing Customer, they have to enter their 6 Digit Digilocker Pin. If Pin is forgot then can be reset by clicking on **Forget Pin?**

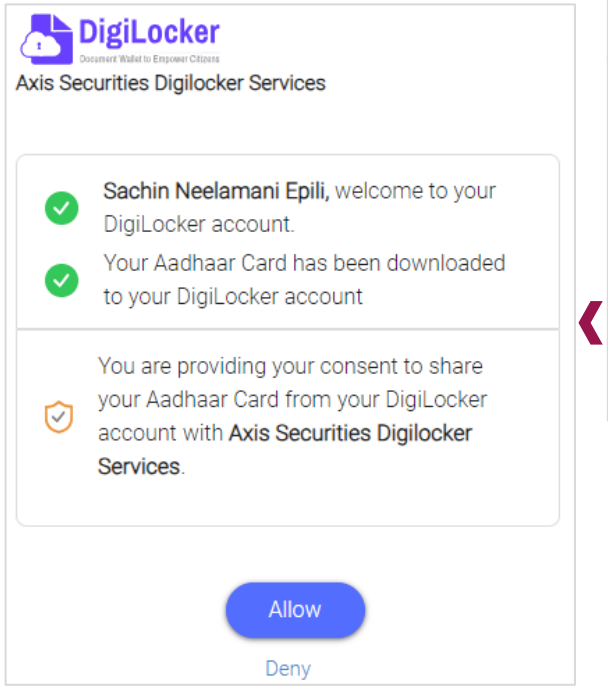
DigiLocker Authentication (Existing to Digilocker A/c)

AXIS SECURITIES









Digilocker Authentication

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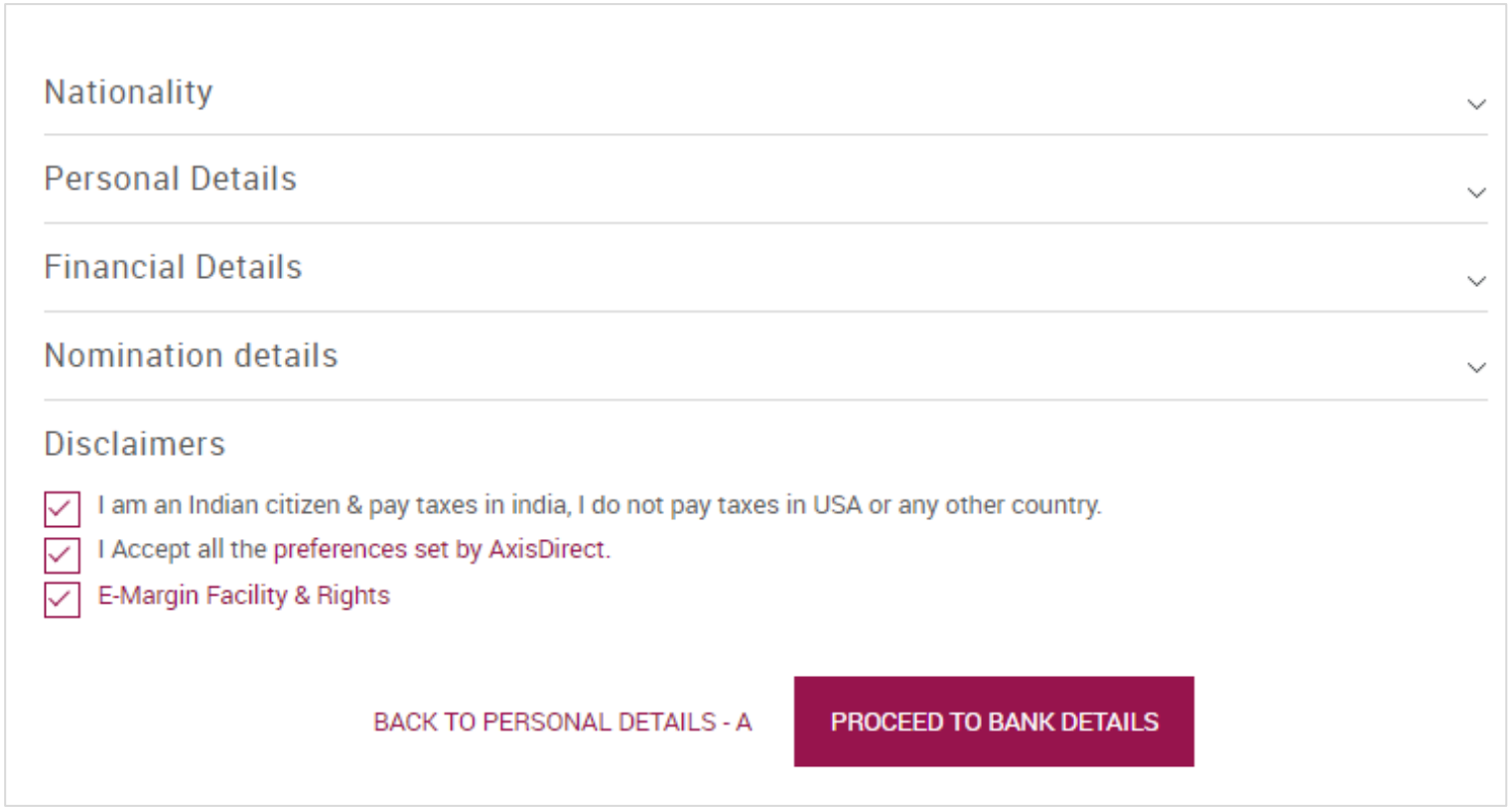
3. Enter the 6 digit Digilocker Security Pin.
4. In the consent page, click on Select all option of **Issued documents.** Make Sure Aadhaar option is selected then click on "Allow".
5. Click on Allow on the next screen to allow **"Axis Securities Limited"** to get the details and documents from "**Digilocker Service".**

Note:

i. The customer who don't have digilocker account, they need to generate a 6 digit security Pin while processing with Digilocker.

ii. 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?**

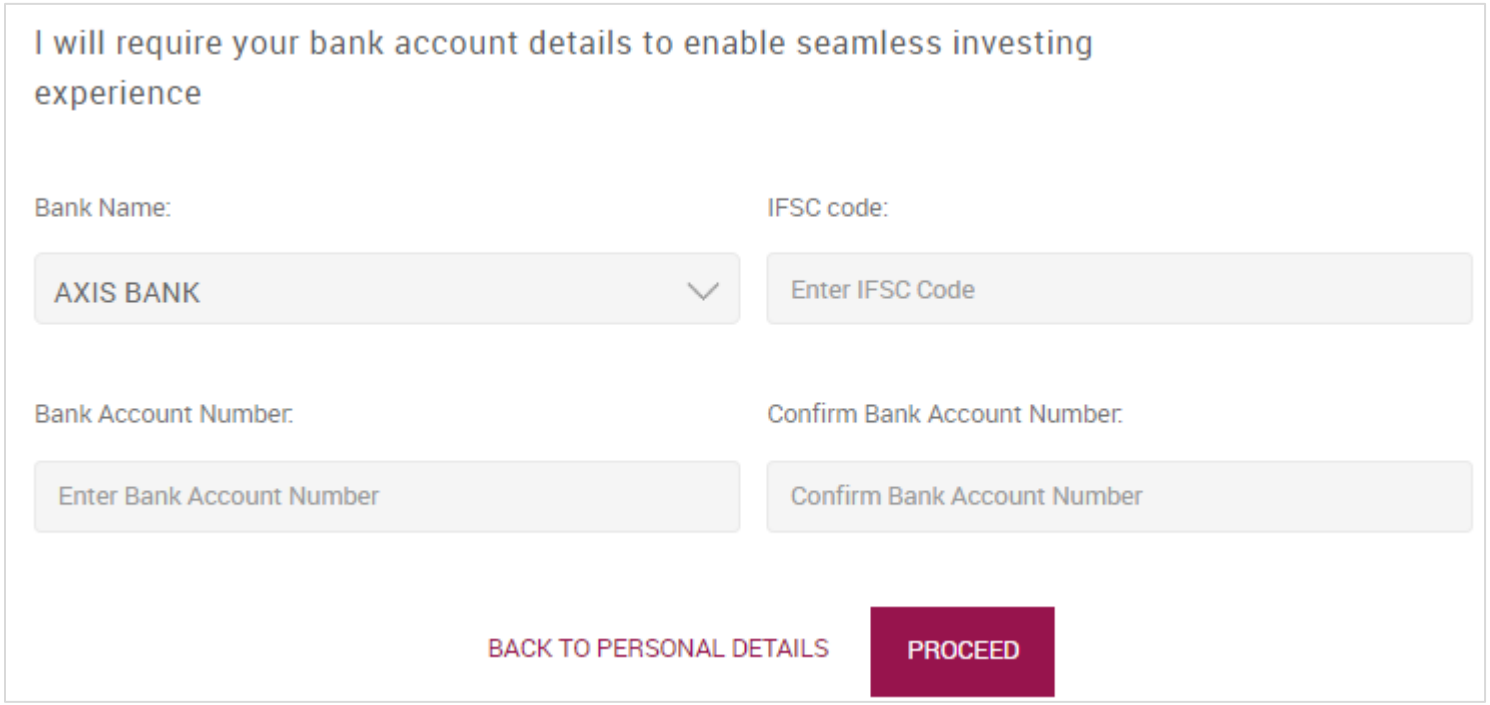
PROFILE B



User Assistance

1. Personal details such as Gender, Father's name will 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.

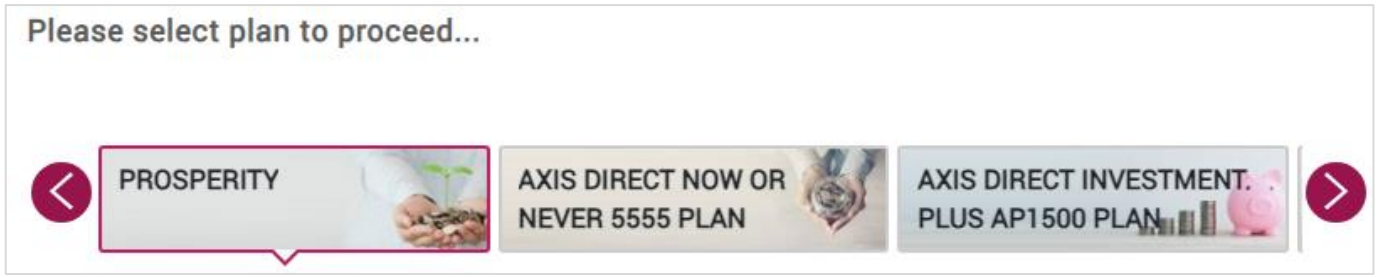
BANK

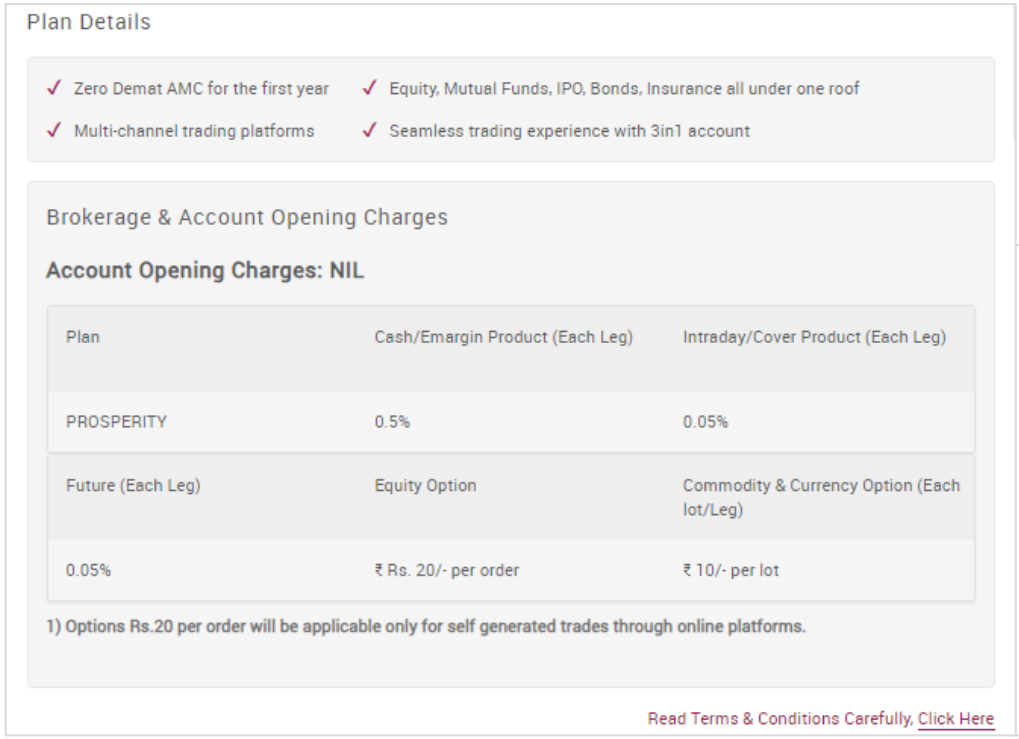


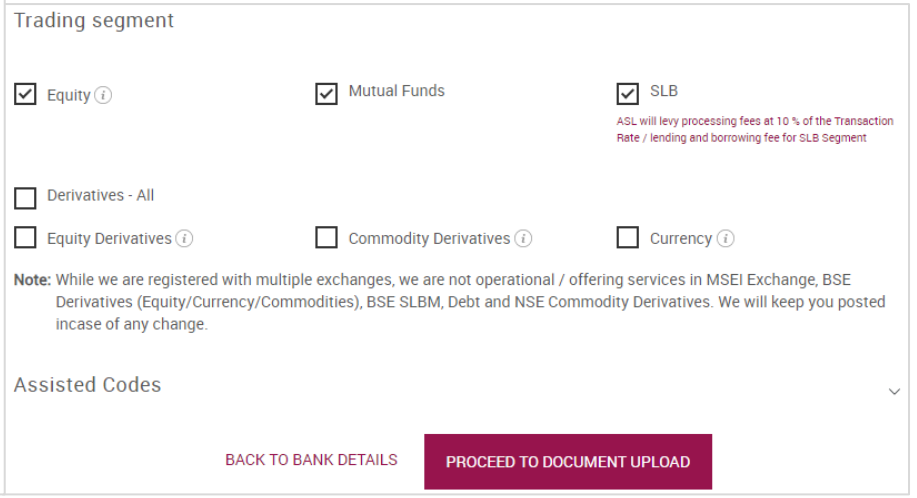
User Assistance

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



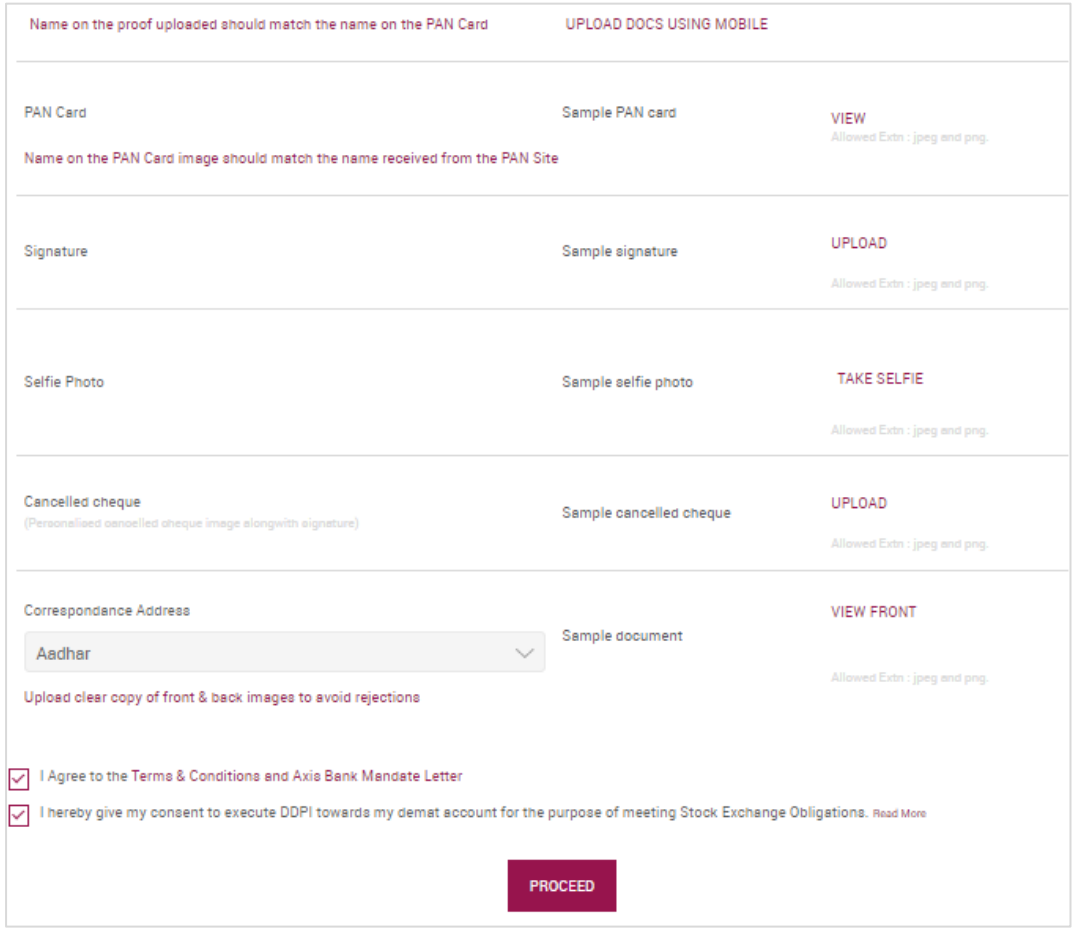




User Assistance

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.

DOCUMENTS UPLOAD (KRA/CKYC Verified)



User Assistance

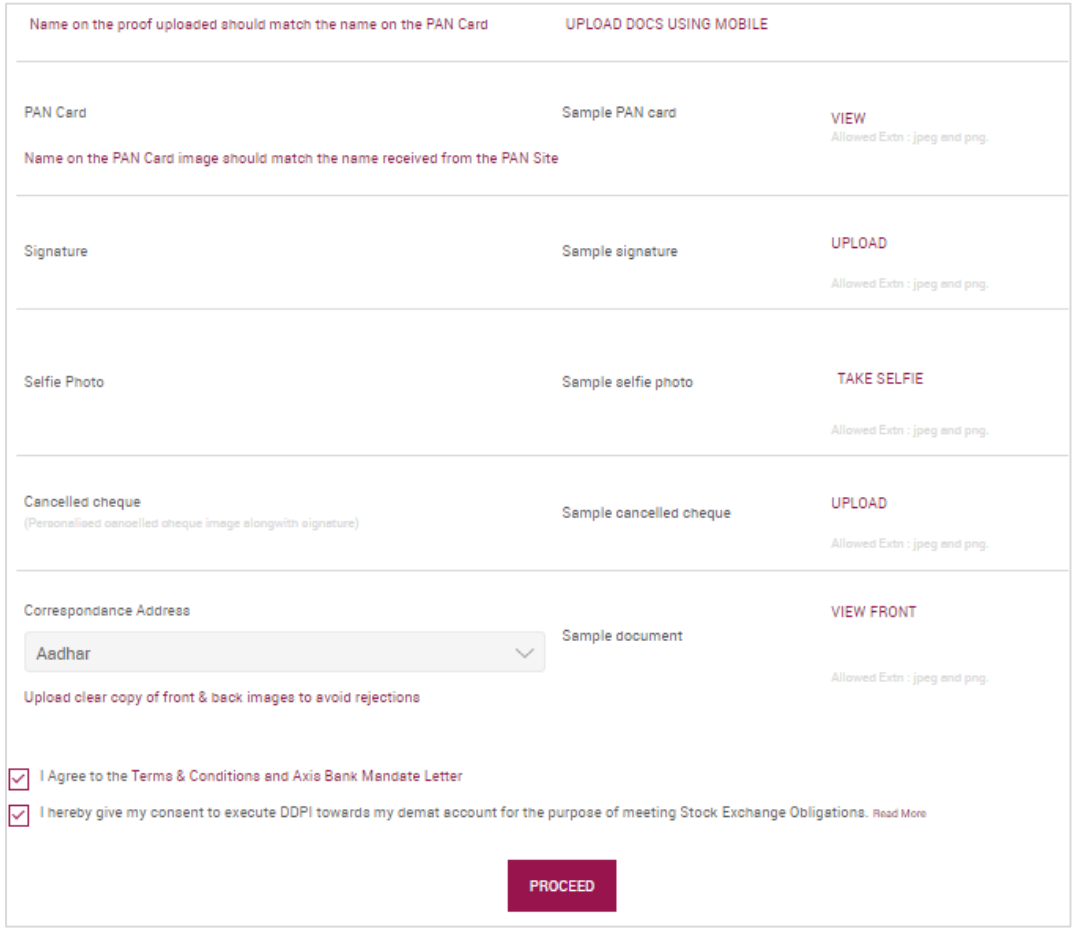
1. All Mandatory documents need to uploaded manually in the journey. Documents Such as:
   - Identity Proof (PAN Card Only)
   - Signature
   - Live Selfie
   - Bank Document(Passbook/Statement/ Personalized Cheque)
   - F&O Document (Only if opted for derivatives)
   - Address Proof (Aadhaar Card/Voter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



User Assistance

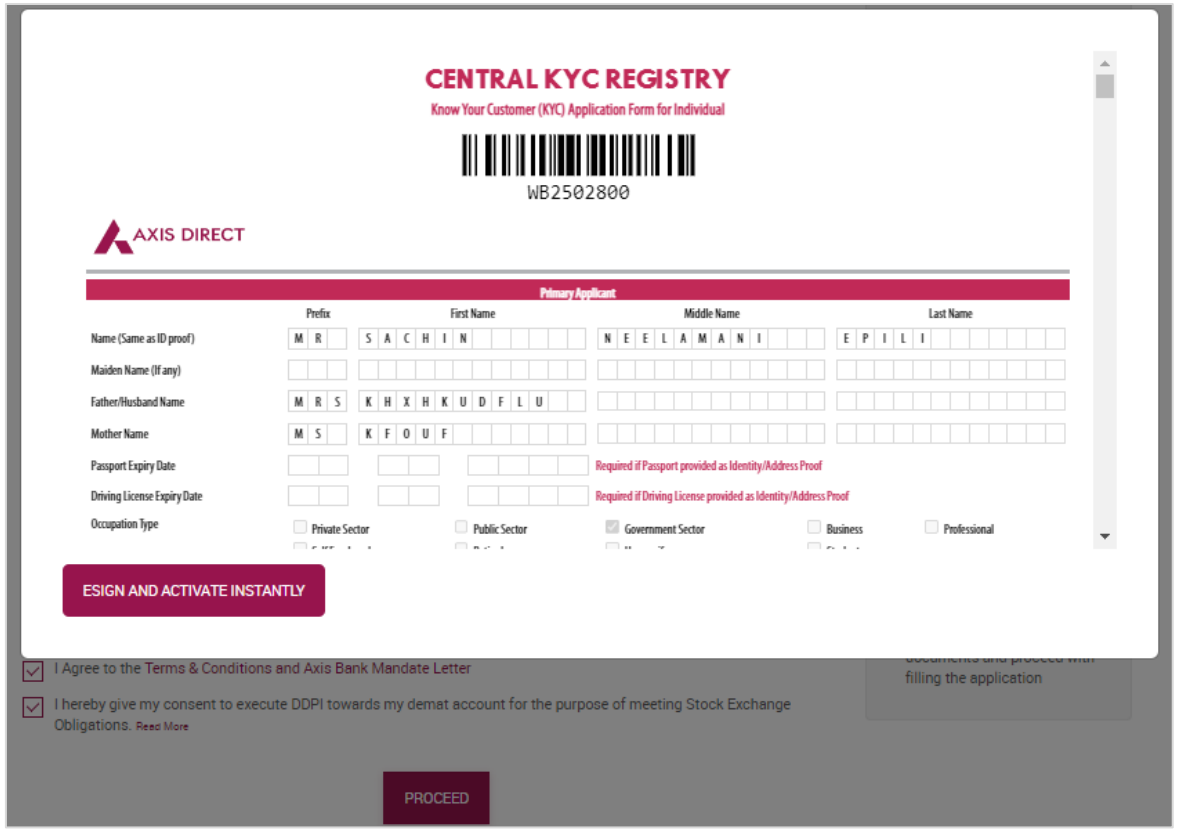
1. The PAN image will fetch from Digilocker, if available in the Digilocker. If not available in Digilocker then the customer will have to upload the same.
2. E-Aadhaar document will be fetched from the Digi Locker Service.
3. As per our existing digital account opening journey, the customer have to 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



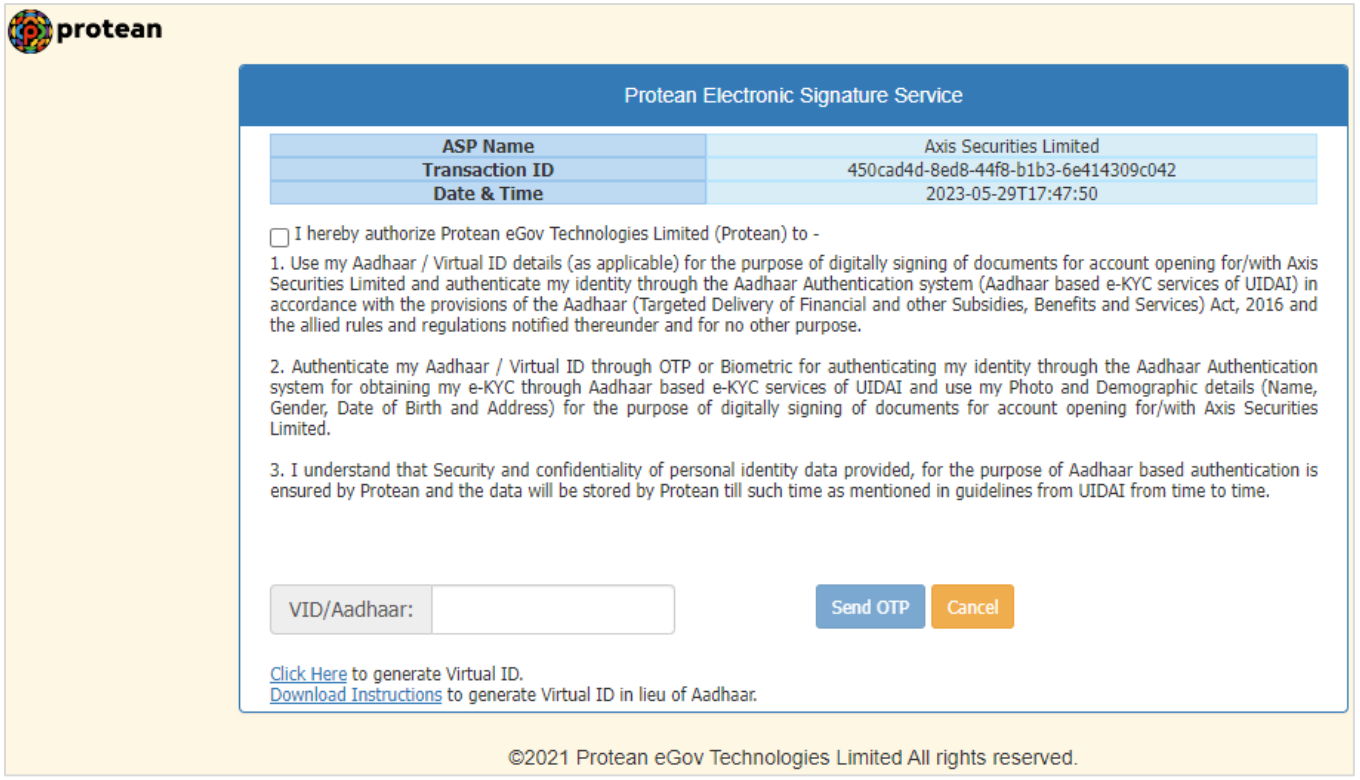
User Assistance

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 editable/removable.

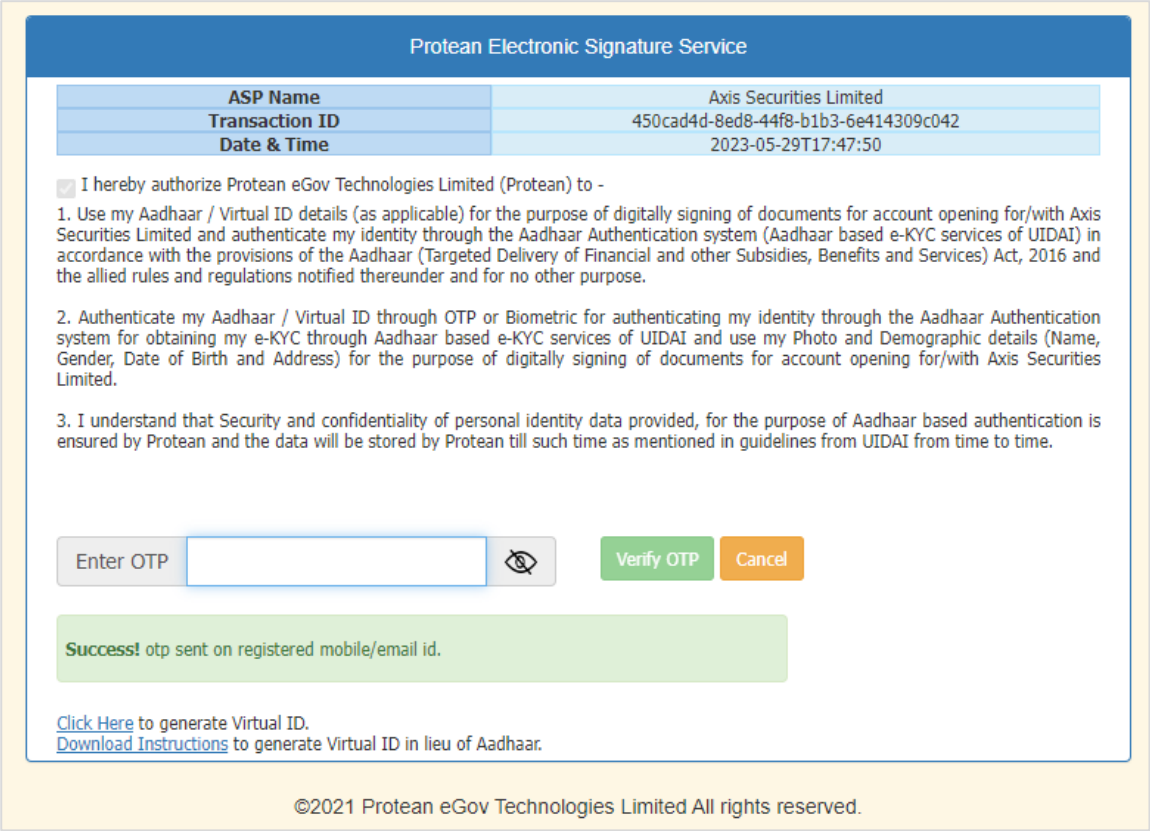
ESIGN



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.

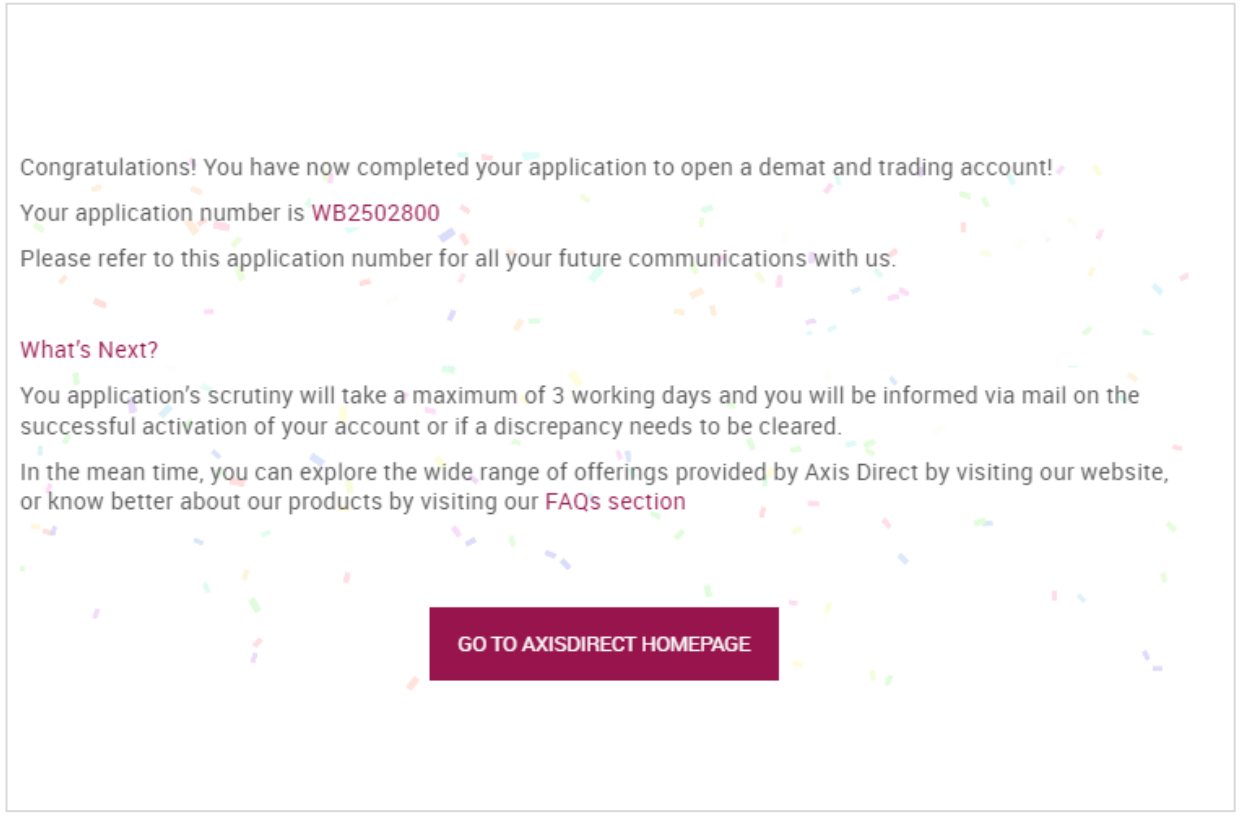
ESIGN



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 re-direct to Thank you Page.

THANK YOU



User Assistance

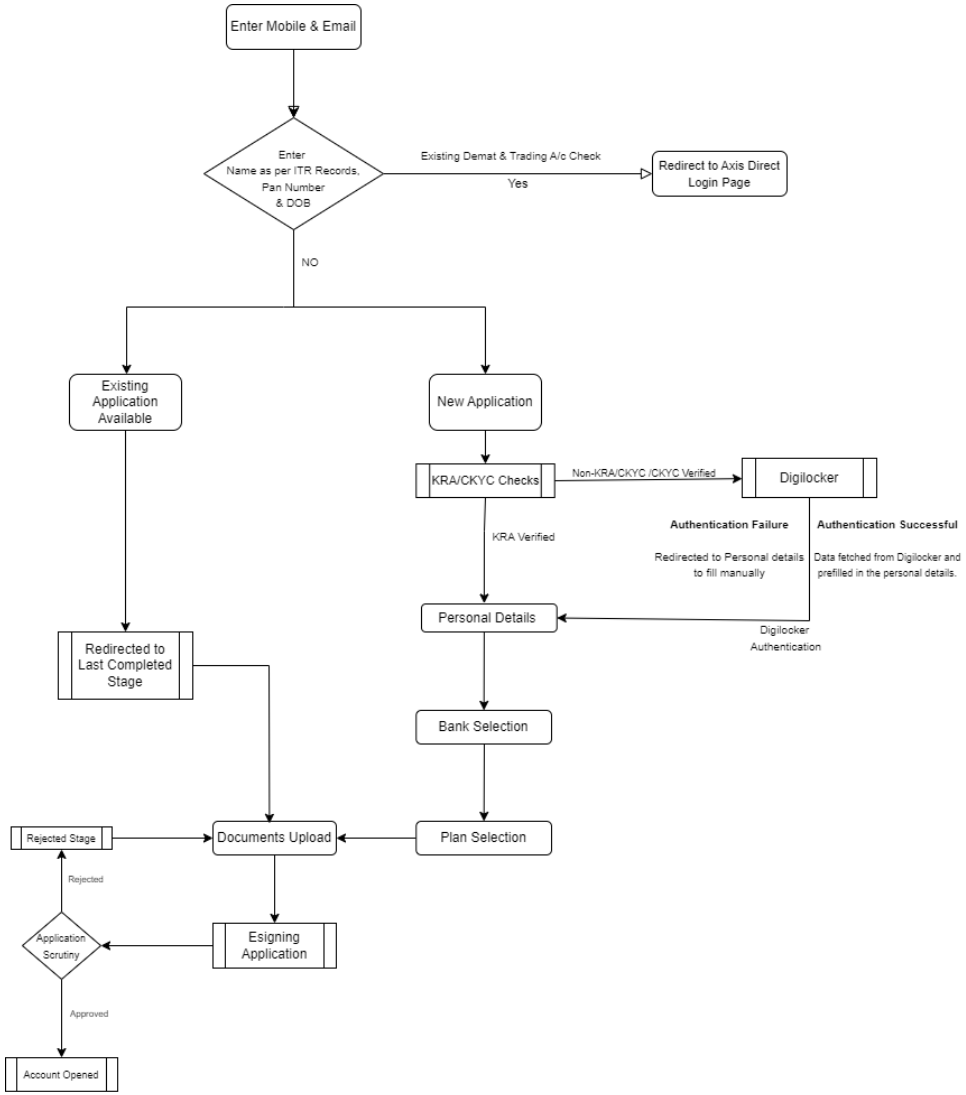
1. After a successful Aadhar authentication it will re-direct to Thank You.
2. After reaching to Thank You Page journey will be completed.

AXIS SECURITIES

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


Enter Mobile & Email
Enter
Name as per ITR Records,
Pan Number
& DOB
Existing Demat & Trading A/c Check
Yes
Redirect to Axis Direct Login Page
NO
Existing Application Available
New Application
KRA/CKYC Checks
Non-KRA/CKYC /CKYC Verified
Digilocker
KRA Verified
Authentication Failure
Redirected to Personal details to fill manually
Authentication Successful
Data fetched from Digilocker and prefilled in the personal details.
Digilocker Authentication
Personal Details
Redirected to Last Completed Stage
Bank Selection
Rejected Stage
Documents Upload
Plan Selection
Rejected
Application Scrutiny
Esigning Application
Approved
Account Opened

Thank You

AXIS SECURITIES