

FAQs - Axis Direct App

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LOGIN

1. How can I log in to the Axis Direct App?

First download the Axis Direct app from the Play/App Store or from the website. Now, after installing the app. Open and log in to the Axis Direct App by Entering the Username and Password, then you will receive an Access code on your registered Mobile number and Email ID. After entering the access code you will be asked to register your biometrics or face ID logged into the Axis Direct app.

2. How to retrieve my password?

You can retrieve the password by Opening the Login screen on the axis direct app, then clicking on 'Forgot Password'. After that, enter your PAN number, Date of Birth, and Email ID, then an OTP will be generated which will be sent to the registered phone number. Following it a new password should be entered and for confirmation again it has to be re-entered.

(To navigate: on Login Page> select Forgot Password>Then, Enter PAN number, Date of birth of the user, and Registered email ID> Enter OTP sent on registered phone number> Enter New password> Re-enter new password)

- How many times can I generate OTP while retrieving my password?

You can generate OTP up to 5 times.

- What if I exceeded the OTP input limit?

Then, please try again next working day or contact customer care.

3. What if I have exceeded the attempts to enter my access code?

You can try on the next business day or reach out to the customer support team for assistance.

4. How to create a Username?

If you already opened an account with Axis Direct, on the Login page you will find the "Create Username" option below the Login button. If not, select "Open an account" at the bottom.

5. What if I wish to log in to the same device using a different user account?

When you Log in for the second time, it will show you the Username of your last login, on the right side of your account name select "Switch account" It will take you to a fresh login screen from there you can log in as a different user.

6. I received an error saying the session has expired, and it's asking me to register the device. What should I do?

If you see the "Session expired, please register the device" error, just switch accounts and log in again with your credentials.

7. How do I update my personal information on the platform?

You cannot update your personal information on the app. Instead, you can update it directly from the website. After logging, go to the "My Account" section. There you will be able to update your details

WATCHLIST

1. How can I view charts of Indices/Pre-defined Indices?

You can find Pre-defined Watchlists of indices on the Watchlists page beside the 'Predefined' tab.

2. How can I Get a Quote for a stock?

On the watchlist, you can directly select the stock or search the stock of your choice and then select the stock you want a quote for.

3. Where can I view Market Movers?

You can view Market Movers(Top Gainers/Losers) under "Top Movers" in the Watchlist section of the Axis Direct app.

4. I have created a watchlist in the TCS app. Can that be migrated into the Axis Direct App?

I regret to inform you that the watchlist created in the TCS app is not transferable to the Axis Direct app.

FUNDS

1. How can I Add/Withdraw Funds?

To Add Funds, simply go to 'More' then click on 'Funds' and on the bottom select "Add Funds", enter the amount to be added then select Proceed.

To withdraw Funds, simply go to 'More' then click on 'Funds' and on the bottom select "Withdraw Funds", enter the amount that you want to withdraw select Proceed

2. How can I view my Fund balance?

You can easily view your Fund Balance in 'the Funds' section under the 'More' tab of the App.

(To navigate: Go to 'More' > Select 'Funds')

ORDERS

1. How can I place an order?

a. Select the stock for which you want to place an order from Watchlist, you will reach on Get Quote page. Next,

b. To place an order, click 'Buy' if you want to buy the stock or 'Sell' if you want to sell the stock.

- For Buy: Choose the product for your order: Delivery, Intraday, Cover Order
- For Sale: Choose the product for your order: Delivery, Collateral and Encash, Intraday, Cover

c. Enter the stock quantity,

d. Select the Order Type: Market Order or Limit Order based on your preference

e. Click 'Buy','/Sell' and you'll reach the Order Confirmation Page. Review the order details and swipe to buy. Your order will be successfully placed.

2. Where can I view my order book?

You can find your Orderbook by clicking on 'Order' on the bottom page of the app where you can view all your Completed and Pending orders.

3. How can I place orders in Mutual Funds?

Simply go to 'More' click on 'Mutual Funds', then select 'Overview' then select the scheme you want to opt for, or select "Explore all funds" to view different funds. After your preferred selection select "invest" to place your order. You can check the status in the order book in the same menu.

4. How can I convert my positions?

You can convert positions in the following ways:

In the bottom menu, go to "Orders," click on the respective orders, and choose "Convert." Alternatively, in the bottom menu, navigate to "Portfolio," go to "Positions," click on the respective position, and select "Convert."

Bottom Menu >>Orders >>Click respective orders>> Convert or Bottom Menu >>Portfolio >>Positions >>Click on respective position >>Convert

INVESTMENT PRODUCTS

1. Equity SIP

A. Can I start an Equity SIP?

Yes, you can. You can start Equity SIP by going to the 'Tools' section of the app and then clicking on 'Equity SIP'. Select '+' at the bottom. Choose a name for your SIP. To add stocks, select "Tap to add stocks". Add stocks as per your choice for your SIP, then enter the Frequency, start date, and duration for your SIP. Then, select "Start SIP" to start your SIP journey.

B. Where can I find my Equity SIP Orderbook?

For Equity SIP Orderbook go to the 'Tools' section and select 'Equity SIP'. Your active and expired SIPs will be shown under the 'Active' and 'expired' tabs.

(To navigate: after login > go to Tools > select Equity SIP)

C. Where can I start my investment in Equity SIP?

To start your Equity SIP, navigate to the 'Tools' section of the app, and select 'Equity SIP'. Select the '+' icon at the bottom. Choose a name for your SIP. To add stocks, select "Tap to add stocks" You add multiple stocks. Add stocks as per your choice for your SIP, then enter the Frequency, start date, and duration for your SIP. Then, select "Start SIP" to start your investing journey.

(To navigate, go to > tools section in the app > Select Equity SIP)

2. What is Younique ? - To navigate scanners go to > Tools > Younique

A. What is YOUnique, and how does it help uncover trending stocks?

YOUunique is a cutting-edge platform designed to uncover trending and highly favored stocks that align with your trading preferences. By analyzing your recent transactions and trading patterns, the platform delivers personalized stock insights tailored specifically for you.

B. How does YOUunique analyze my recent transactions and trading patterns?

YOUunique employs advanced algorithms to analyze your recent transactions and trading patterns. It considers factors such as your trading frequency, preferred sectors, and historical performance to identify trends and preferences unique to your trading style.

C. Why is personalized stock insight important for traders?

Personalized stock insights are crucial for traders as they provide tailored information aligned with individual preferences. Youunique's analysis ensures that the stocks presented are in line with your trading style, helping you make more informed decisions that resonate with your unique approach to the market.

D. How can YOUunique benefit my trading strategy?

YOUunique enhances your trading strategy by presenting stocks that are highly favored and trending based on your specific preferences. This personalized approach empowers you to focus on opportunities that align with your trading style, potentially leading to more successful and satisfying outcomes.

3. Where can I find Smallcase?

You can find Smallcase in the 'Offerings' section under the 'More' section.

(To navigate: got to More> Offerings> Smallcase)

3. What is Axis Intellect?

An innovative investment approach that uses a proprietary model called 'Axis Intellect Score' to analyze over 1.5 million data points for shortlisting stocks for investment. This Unique approach boosts your opportunity for earning gains in the long term.

4. What is SmartEdge Plus?

SmartEdge Plus is a research-backed investment facility designed for investors and traders who are looking for 24*7 monitored investment solutions that can take out the stress of investing by helping them with stock suggesting, rebalancing, and diversifying their investments.

5. Mutual Funds

A. Where can I find my Unit Holdings?

You can find your Mutual Funds Holdings by going to the 'More' section, selecting 'Mutual Funds' then simply selecting 'Holdings'.

(To Navigate: After login > go to More > Select Mutual Funds > select Holdings)

B. I am not able to find my Mutual Funds Orderbook.

You can find your Mutual Funds Orderbook in the 'Mutual Funds' section under the section 'More'

6. I am not able to find NFO.

You will find the New Fund Offer (NFO) under the 'Mutual Funds' section, located within the 'More' tab.

(To navigate: after login > More > MF > NFO/FMP)

7. Where is FMP?

You will find Fixed Maturity Plan (FMP) is included in the 'NFO' under the 'Mutual Funds' section.

(To navigate: after login >More > MF > NFO/FMP)

8. Where can I view information about upcoming IPOs?

You can simply go to the 'More' tab and then click on 'IPO', here you will get information about Current and Upcoming IPOs.

TradingTools

1. What is Instant Trade?

Instant trade is a tool by which you can quickly Buy or Sell a stock with a single click. You just have to click on 'UP' if you think the market will be going in an upward trend or click on 'Down' if you think the market will be going in a downtrend.

2. Scanners - To navigate scanners go to > Tools > Scanners

A. What are scanners?

Scanners are tools used by traders and investors to filter and screen stocks based on specific criteria or parameters. These tools help traders identify potential trading opportunities by quickly sorting through a large universe of stocks to find those that meet their specific requirements. Screeners are commonly used for both bullish and bearish strategies.

B. How can I use Scanners?

On the homepage, go to tools; Select scanners. Select Group. The group is a filter functionality where you can filter indexes or various industry groups or businesses based on your preference.

There are three sections bullish and bearish and others under which you can select the indicators based on your preferences. , Bullish criteria section represents conditions signaling a positive outlook for a stock. When a stock scanner identifies these conditions, it suggests the stock may be poised for price gains and growth opportunities. Bearish signals point to a negative outlook for a stock, indicating potential price declines and selling opportunities.

For example, select NSE as a filter, then select index as Nifty 50. Now, select bullish, and select scanning indicator as the green body. The green body

indicator represents a bullish price movement, where the closing price is higher than the opening price. Now, you will see all the stocks here filtered out just for you based on the scanning indicator you have selected. You can add this scanner to your favorite list. Simply, just tap on the star icon. You can quickly access all your favorite scanners on the menu under favorites. Similarly, you can choose different types of indicators based on your strategic trading or investment preference.

3. OI Analysis – (To navigate, go to > tools section in the app > OI Analysis)

A. What is OI Analysis and how can it empower my trading decisions?

OI Analysis, or Open Interest Analysis, is a powerful tool that provides in-depth insights into both long and short build-up/covering details in the market. By understanding the Open Interest trends, traders can make more informed and strategic decisions, enhancing their overall trading approach.

B. How does OI Analysis help in long and short build-up/covering details?

Our OI Analysis delves into the dynamics of open interest, shedding light on the accumulation or reduction of positions, both long and short. This information is crucial for traders seeking a comprehensive understanding of market sentiment, enabling them to anticipate potential trends and make well-informed decisions.

C. Why is it important to have a strategic approach to the market?

A strategic approach is essential for successful trading. Our OI Analysis equips you with the necessary information to develop and execute strategic plans. By considering both long and short build-up/covering details, you can align your trades with market dynamics and enhance your chances of making profitable decisions.

D. How can I incorporate OI Analysis into my trading routine?

Integrating OI Analysis into your trading routine is straightforward. Regularly check our comprehensive insights to stay updated on open interest trends. Use this information to complement your existing analysis and decision-making process, ensuring a more well-rounded and strategic approach to the market.

E. Is this service suitable for both novice and experienced traders?

Absolutely! Whether you're a novice trader looking to understand market dynamics or an experienced one seeking more comprehensive insights, our OI Analysis caters to all levels of expertise. The information provided is designed to empower traders, regardless of their experience, for more confident and strategic decision-making.

Research

1. Where can I find Investment Ideas, Reading Ideas, and Derivative trading Ideas?

Investment Ideas, Research Ideas, and Derivative Trading Ideas are now renamed as Long-term, Positional, and F&O which can be found under Research Ideas under the Tools section.

(To navigate: go to Tools>Research Ideas>Long Term/Positional/F&O)

2. Are research calls provided in the Axis Direct app?

Yes, the Axis Direct app also provides you with research calls which you can view Under the 'Tools' section of the app. You can find all the Intraday, Positional, long-term, Currency, and many other research calls. Simply, Go to Tools>Research Ideas

3. Where can I view the Fundamental research of a script/company?

Select any script from the watchlist or directly search for a script from the search bar. Select the script, you will get a quote screen. Swipe left on overview, and select financially. Here, you can view the QVT score, SWOT analysis, Shareholding summary, Historical Holdings, Insights, and many more.

4. Where can I view the Technical research of a script/company?

Select any script from the watchlist or directly search for a script from the search bar. Select the script, you will get a quote screen. Swipe left on overview, and select 'Technical'. Here, you can view Moving averages, Legend, Resistance and support, Indicators, Beta, Delivery and volume charts, Price change analysis, and many more.

5. How can I view news and events related to a stock?

Select any script from the watchlist or directly search for a script from the search bar. Select the script, you will get a quote screen. Swipe left on overview, and select 'Technical'. Here, you can view Moving averages, Legend, Resistance and support, Indicators, Beta, Delivery and volume charts, Price change analysis, and many more.

Portfolio

1. Where can I view my Holdings?

You can view your Holdings in the 'Portfolio' section under 'Holdings' where you will find your Demat Holdings, Collateral Holdings, and Unsettled Holdings.

2. Where can I view my open positions?

You can view your Open positions in the Portfolio book under the 'Open Positions' tab.

(To Navigate: go to Portfolio > Open positions)

3. Where can I view my closed positions?

You can view your closed positions in 'Portfolio' at the bottom of the page where you will find an option for 'Closed positions'.

4. How can I hold my securities?

You can easily hold your stock just by going to the 'Portfolio' tab then 'Holdings' under that go to 'Demat Holdings' then click on the script and you will get an option for 'Hold Stock'.

(To Navigate: go to Portfolio>Holdings>Demat>click on scrip>Hold Stock)

5. How can I release my securities?

Securities are auto-released after the cancellation of Orders.

6. Where can I find my 'Demat Balance'?

Demat Balance which is now renamed as 'Demat Holdings' can be accessed by going to the "Portfolio" section, then selecting "Demat Holdings.

(To Navigate: Portfolio >>Demat Holdings)

7. Where are my Net Positions?

'Net Positions' is renamed to 'Today Positions' which you can find by Navigating to the "Portfolio" section in the bottom menu and selecting "Today's Position".

(To Navigate: Bottom Menu >>Portfolio >>Today's Position)

8. Where can I view my Security Holdings?

Security Holding which is now renamed as 'Collateral Holdings' can be found in 'Portfolio' under the 'Holdings' section.

(To Navigate: Portfolio>Holdings>Collateral Holdings)

Reports

1. Is there a feature to track gains and losses over time?

Yes, you can track gains and losses by viewing "Capital gain & Loss statement" in the reports section of the app. To navigate, go to More>Reports>Capital Gain & Loss statement

2. How can I access my transaction history on the trading app?

You can access your transaction history by using the "Transaction Summary Report" in the reports section of the app. To navigate, go to More>Reports>Transaction Summary

3. Where can I find a Dividend statement?

You can find the Dividend statement in the 'Reports' section which is under the 'More' tab. More>Reports>Dividend statement

4. I wanted detailed Reports of my Funds and Stocks, where can I get them?

You can access various reports such as Fund snapshots, Ledger, Contract Notes, Closed Positions, P&L statements, Capital Gain/Loss statements, Transactions Summary, Dividend Statement, and Demat Reports in the 'Reports' section under the 'More' tab.

(To navigate: After login > got to More > Select Reports)

Settings

1. Can I change my application's theme?

Yes, you can easily change the application's theme. You just have to go to the 'More' tab click on 'Settings' and then just choose from the two options of themes (Dark and Light).

2. How can I change my password?

To change your password, go to the 'More' option, select 'Settings,' then click on 'Change Password.' Enter your old password and set a new one. Click 'Submit,' and your password will be successfully updated. More>Settings>Change password

Others

1. Are there any Refer and Earn Rewards?

Yes, you can refer to your friend. You and your friend both will get cumulative benefits of up to ₹2500(approx). You just have to go to the 'More' tab and click on refer and after that, you will have to create a Client code which you have to ask your friend to then enter in his app for rewards.

2. How can I contact customer support for some queries?

You can go to the 'More' section, then click on 'Support' which was previously named 'Contact Us', here you will get the details for contacting us.

