



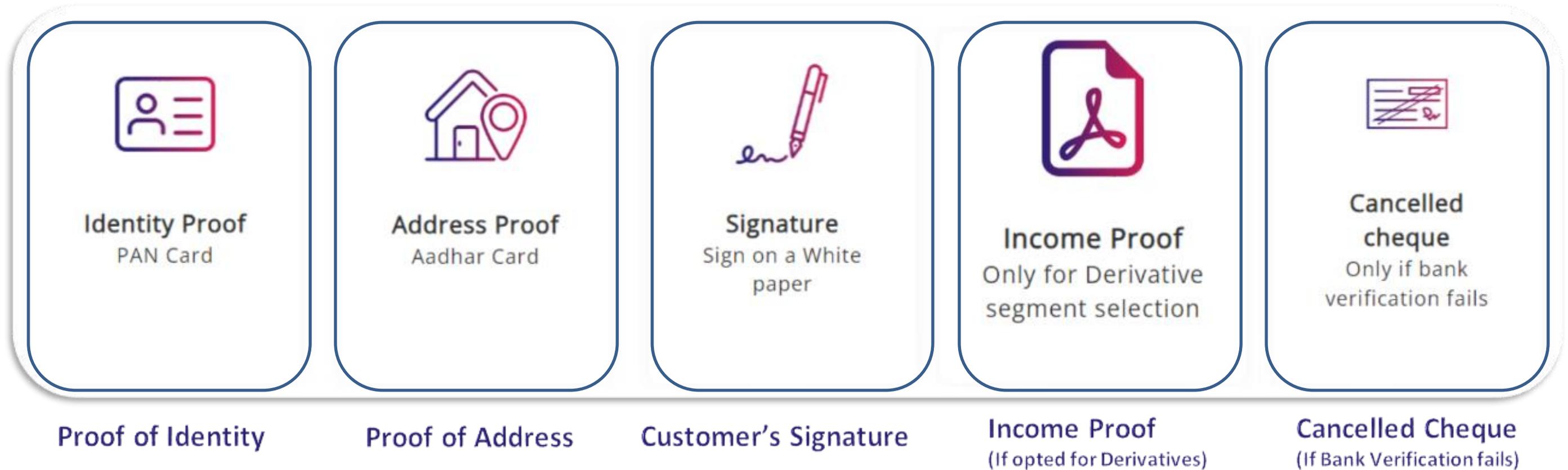
Investment aur Trust, Dono

Account Opening Journey

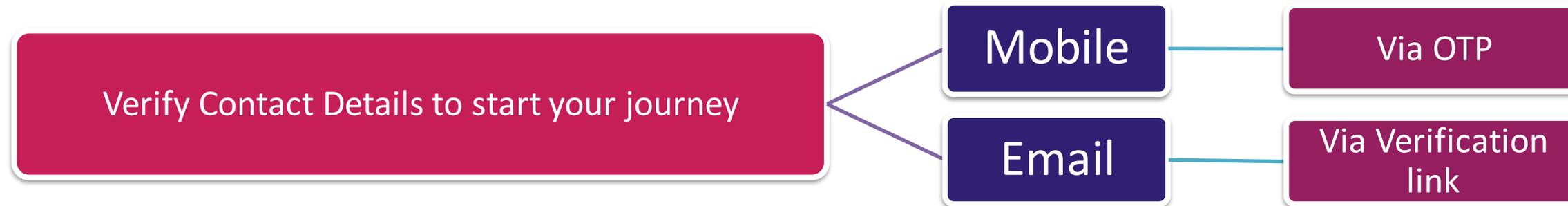
Path for Account Opening Journey



Important Documents which are required to Open Demat & Trading A/c



Verify your Contact Details



Open Your Demat & Trading Account Now!

9xxx8xxxx0

axxx@gmail.com

By submitting this, I accept all the terms and conditions

Resume Application

Submit

Track your Application status. [Click Here!](#)

Mobile OTP Verification ✕

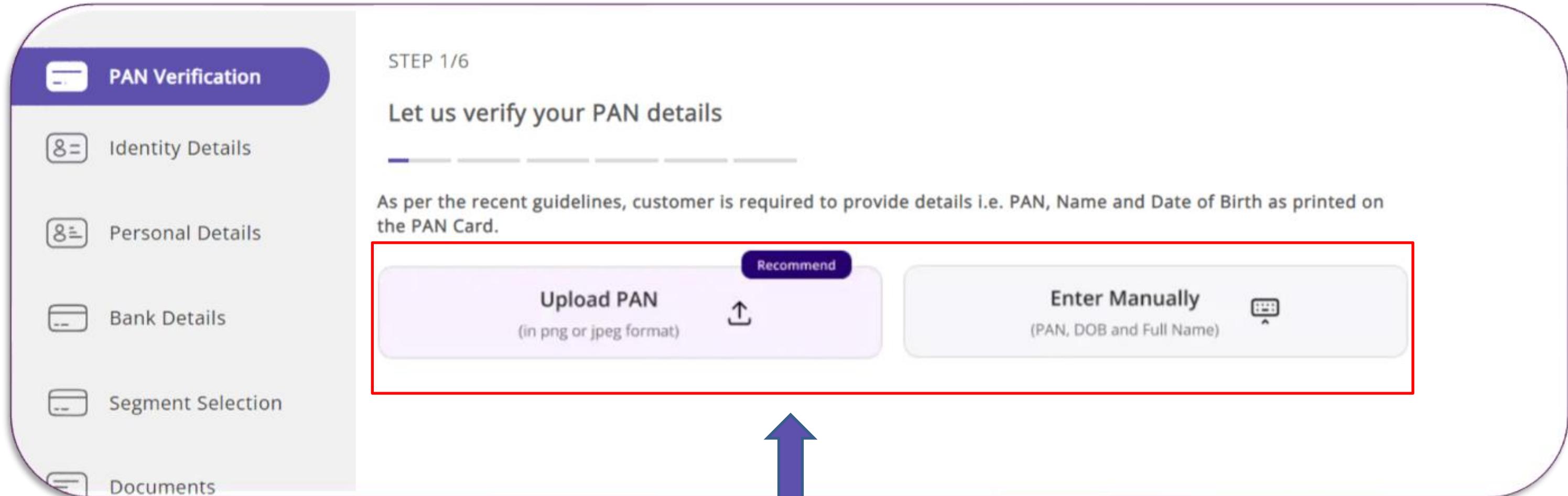
Enter the OTP sent to your registered mobile number

1 2 3 4 5 6

Resend OTP : 00:57

CONFIRM OTP

Verify your PAN Details

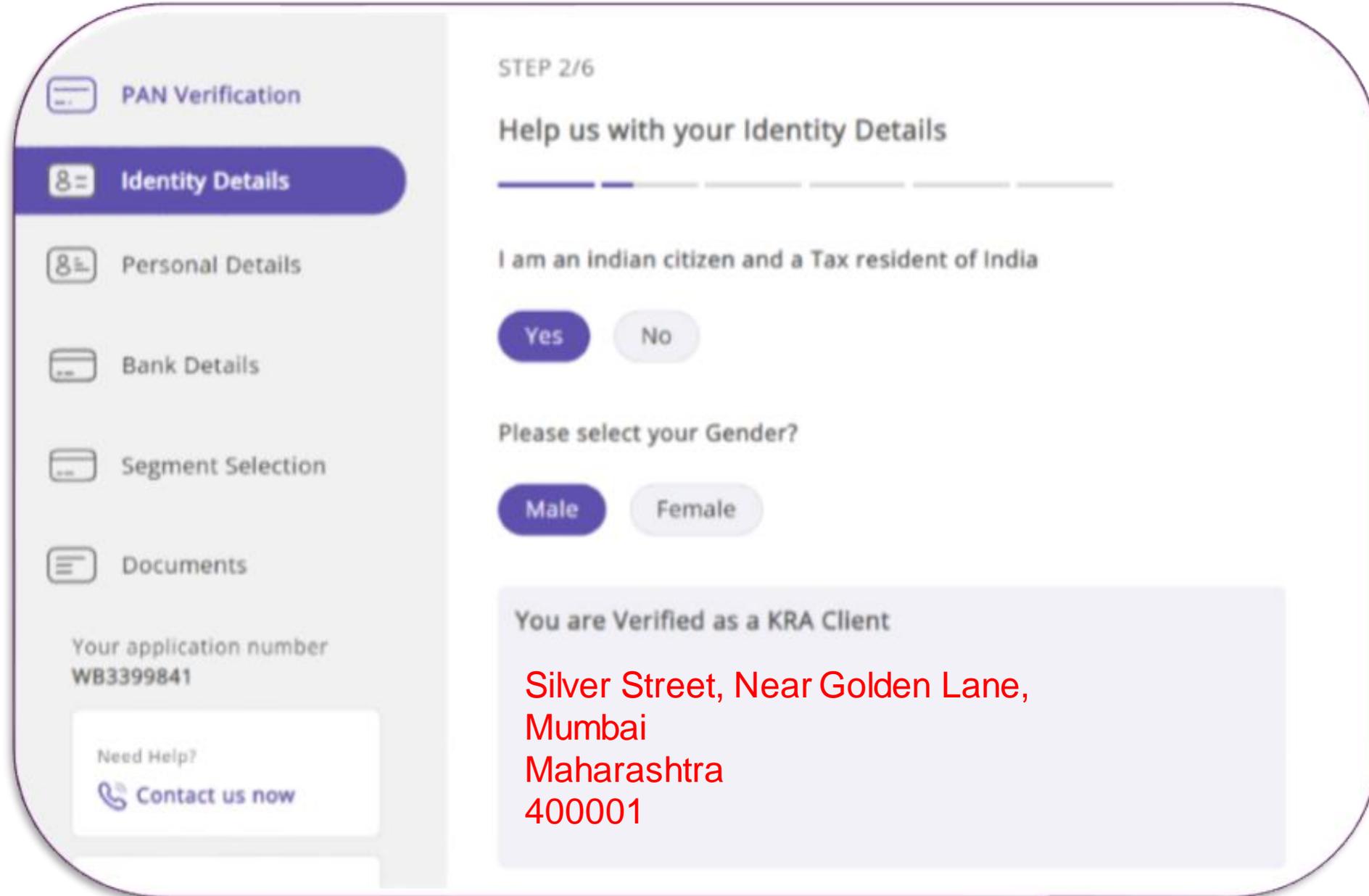


The screenshot shows a mobile application interface for PAN verification. On the left is a vertical sidebar with menu items: PAN Verification (highlighted), Identity Details, Personal Details, Bank Details, Segment Selection, and Documents. The main content area is titled 'STEP 1/6' and 'Let us verify your PAN details'. Below this is a progress bar and a paragraph: 'As per the recent guidelines, customer is required to provide details i.e. PAN, Name and Date of Birth as printed on the PAN Card.' Two buttons are presented: 'Upload PAN (in png or jpeg format)' with an upload icon and a 'Recommend' badge, and 'Enter Manually (PAN, DOB and Full Name)' with a keyboard icon. A red rectangular box highlights both buttons, and a large blue arrow points upwards from the text below towards this box.

Post Mobile & Email verification, verify your PAN Details via Uploading the PAN or entering the details manually

Identity Details

Verify the Identity Details fetched from your KYC Details. In case, your KYC is not registered then you can update the address via Digi locker (if mobile no. is linked with Aadhaar) or by uploading the Aadhaar card (if mobile no. not linked with Aadhaar)



The screenshot displays the 'Identity Details' step (STEP 2/6) of a KYC verification process. On the left, a navigation menu lists 'PAN Verification', 'Identity Details' (highlighted), 'Personal Details', 'Bank Details', 'Segment Selection', and 'Documents'. Below the menu, the application number 'WB3399841' is shown, along with a 'Need Help? Contact us now' button. The main content area asks the user to confirm they are an Indian citizen and a tax resident of India, with 'Yes' selected. It then asks for gender, with 'Male' selected. A confirmation message states 'You are Verified as a KRA Client' and displays the address: 'Silver Street, Near Golden Lane, Mumbai Maharashtra 400001'.

STEP 2/6

Help us with your Identity Details

I am an indian citizen and a Tax resident of India

Yes No

Please select your Gender?

Male Female

You are Verified as a KRA Client

Silver Street, Near Golden Lane,
Mumbai
Maharashtra
400001

Personal Details

STEP 3/6

We need a few more personal details

— — — — —

Title Miss ▼	Name Name as per PAN	Email axxxx@gmail.com ✎
Mobile Number 9xxx5xxxx0 ✎	Marital Status Marital Status ▼	
Father's Name Father's / Husband's Name	Occupation Occupation ▼	
Annual Income Annual Income ▼	Trading Experience Trading Experience ▼	

Would you like to add nominee to this account?

Yes, I wish to add nominee No, I do not wish to add nominee

Left Sidebar:

- PAN Verification
- Identity Details
- Personal Details**
- Bank Details
- Segment Selection
- Documents

Your application number **WB3598763**

Need Help?
[Contact us now](#)

Verify your Personal Details required for opening Demat & Trading A/C

Nominee Details

PAN Verification

Identity Details

Personal Details

Bank Details

Segment Selection

Documents

Your application number **WB3598763**

Would you like to add nominee to this account?

Yes, I wish to add nominee No, I do not wish to add nominee

Nominee details 1

Nominee First Name*	Nominee Last Name*
Date of birth*	Nominee relationship with Client* ▼
Nominee Mobile Number(Not mandatory)	Nominee Email ID(Not mandatory)
Id Proof(Not mandatory) ▼	Id proof number(Not mandatory)

What percentage of the overall value should be given to this nominee? / 100%

In Nominee Details, if you wish to add Nominee then you need to provide Nominee Name, DOB, Relationship along with the percentage. In case of minor, need to provide Guardian Name, DOB, Relationship. If you do not wish to add nominee then you can proceed by clicking “No, I do not wish to add nominee.”

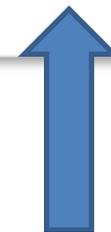
Bank Details

STEP 4/6

Link your bank account with us

SBIN000001	Main Branch, Kolkata
12345678901	12345678901

Your application number WB3399841



Verify your Bank Details

Bank Details

- PAN Verification
- Identity Details
- Personal Details
- Bank Details**
- Segment Selection
- Documents

Your application number **WB3568486**

Need Help?
[Contact us now](#)

For Support
[Call us](#)

SBIN000001 **Main Branch, Kolkata**

12345678901 **12345678901**

Uploaded File

Cancelled Cheque or Recent Bank Statement

 133386190158576655.jpg  

Allowed Extn : jpeg, png and pdf
Max Size : 4MB

Upload Cancelled Cheque or Bank Statement if Bank verification fails

Scheme Selection

STEP 5/6
Choose how you would like to invest?

Equity / Mutual Fund Derivative

	Suvidha account	Plan 249	Pro 749	One India One Plan - 3K	One India One Plan - 10K
Brokerage Reversal	Free	Zero Brokerage on First 3 Trades (excluding trades of E-Margin(MTF) Products).	Zero Brokerage on First 3 Trades (excluding trades of E-Margin(MTF) Products).	Zero Brokerage on First 3 Trades (excluding trades of E-Margin(MTF) Products).	Zero Brokerage on First 3 Trades (excluding trades of E-Margin(MTF) Products).
AMC(Waived off 1st Year)	₹0	₹0	₹0	₹0	₹10000
Total value of Benefits	₹500	₹500	₹500	₹500	₹500
Benefits Tenure	1 year	1 year	Lifetime	1 year	Lifetime
	More Details	More Details	More Details	More Details	More Details

Select the segment in which you wish to trade and select the Brokerage plan which you want to proceed with.
Please note, amount will be auto-debited from your bank account (In case of SBI Bank Account)

Trade Preference

STEP 5/6

Choose how you would like to invest?

I am an Indian citizen and a Tax resident of India

I am an not politically-exposed (PEP) or related to a PEP

[Preferences](#) set by SBICAP Securities

I want my unused funds to be settled after every 90 Days ▾

Most important [Terms & Conditions](#)

[AGREE ALL >](#)

PAN Verification

Identity Details

Personal Details

Bank Details

Segment Selection

Documents

Your application number WB5083358

Need Help?
[Contact us now](#)

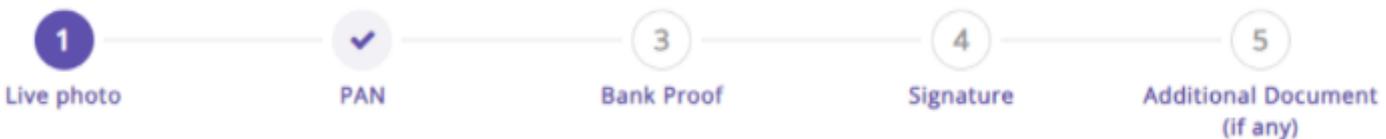
For Support
[Call us](#)

Trade Preferences set by SBICAP Securities, customer can make the changes and agree to proceed further

Documents required

STEP 6/6

Live Photo



Please show your face in front of the webcam



 OPEN CAMERA

- PAN Verification
- Identity Details
- Personal Details
- Bank Details
- Segment Selection
- Documents**

Your application number **WB3825902**

Need Help?
 [Contact us now](#)

For Support
 [Call us](#)

Documents required

STEP 6/6

PAN

Live photo **PAN** 3 Bank Proof 4 Signature 5 Additional Document (if any)

Uploaded PANCard Image



REUPLOAD PROCEED

Documents

- PAN Verification
- Identity Details
- Personal Details
- Bank Details
- Segment Selection

Your application number WB3825902

Need Help?
[Contact us now](#)

For Support
[Call us](#)

Documents required

STEP 6/6

Bank Proof

Live photo PAN **3 Bank Proof** 4 Signature 5 Additional Document (if any)

Please upload any one of the following document that required Cancelled Cheque or Recent Bank Statement



Bank Name Here
Bank Address Here

VALID FOR THREE MONTHS FROM THE DATE OF ISSUE

Date 9
D D M Y Y Y Y

PAY _____ OR BFRER _____

RUPEES _____

A/C NO. 012345678901234

Payable at par at all branches of Bank Name in Country

Please sign above

⑈ 1 2 3 4 5 6 ⑈ 1 2 3 4 5 6 7 8 9 ⑈ 1 2 3 4 5 6 ⑈ 1 2

UPLOAD BANKPROOF

PAN Verification

Identity Details

Personal Details

Bank Details

Segment Selection

Documents

Your application number WB3825902

Need Help?

Contact us now

For Support

Call us

Documents required

PAN Verification

Identity Details

Personal Details

Bank Details

Segment Selection

Documents

Your application number **WB3825902**

Need Help?
[Contact us now](#)

For Support
[Call us](#)

STEP 6/6

Signature

✓ Live photo ✓ PAN ✓ Bank Proof **4** Signature 5 Additional Document (if any)

Take a photo of your signature and upload it



 **UPLOAD YOUR SIGNATURE**

Documents required

STEP 6/6

Additional Documents (if any)

Live photo ✓ PAN ✓ Bank Proof ✓ Signature ✓ Additional Document (if any) 5

If you want to add Additional Proof



Allowed Extn : jpeg and png
Max Size : 4MB

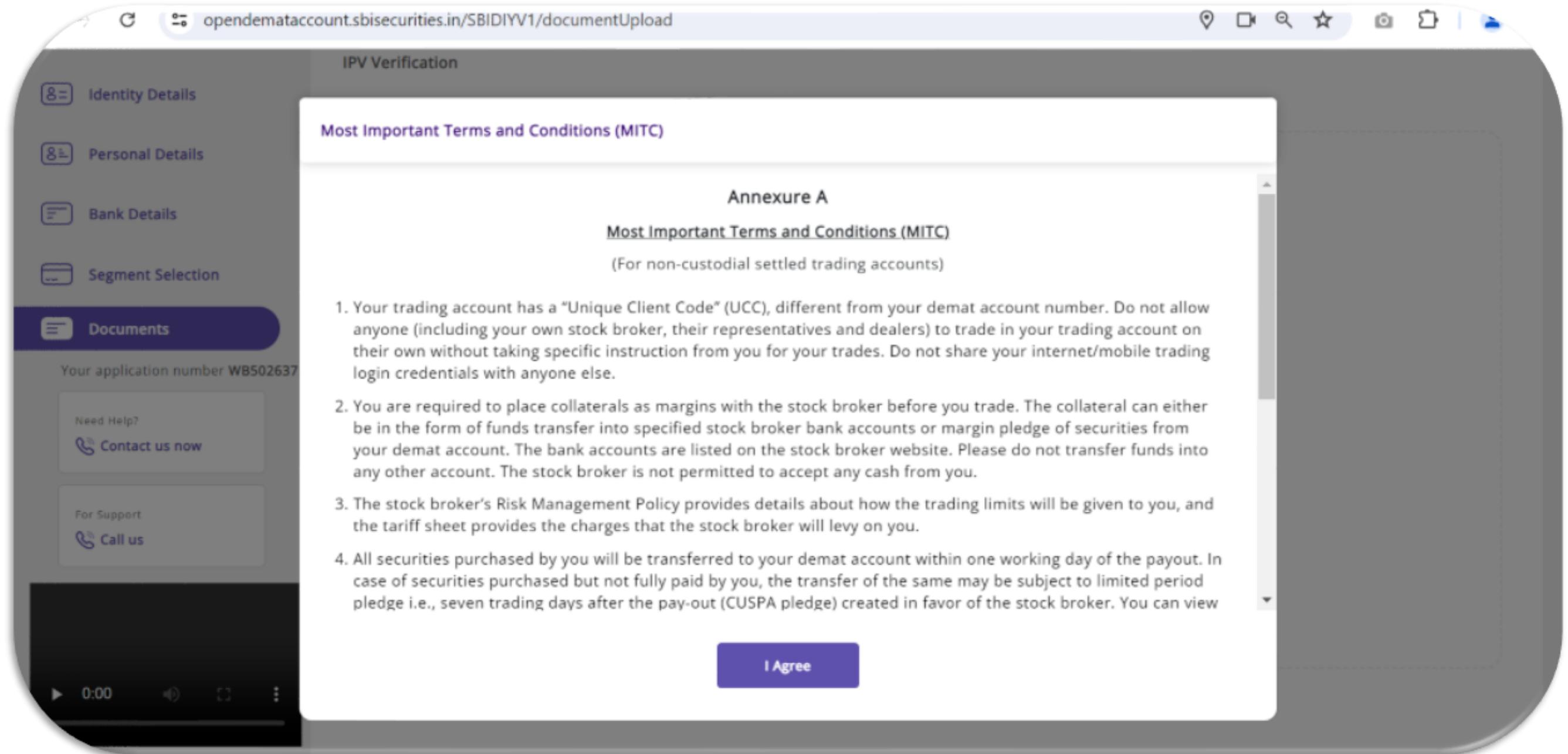
Documents

- PAN Verification
- Identity Details
- Personal Details
- Bank Details
- Segment Selection

Your application number WB3825902

Need Help?
[Contact us now](#)

For Support
[Call us](#)



opendemataccount.sbisecurities.in/SBIDIYV1/documentUpload

IPV Verification

Identity Details

Personal Details

Bank Details

Segment Selection

Documents

Your application number WB502637

Need Help?
[Contact us now](#)

For Support
[Call us](#)

0:00

Most Important Terms and Conditions (MITC)

Annexure A

Most Important Terms and Conditions (MITC)

(For non-custodial settled trading accounts)

1. Your trading account has a "Unique Client Code" (UCC), different from your demat account number. Do not allow anyone (including your own stock broker, their representatives and dealers) to trade in your trading account on their own without taking specific instruction from you for your trades. Do not share your internet/mobile trading login credentials with anyone else.
2. You are required to place collaterals as margins with the stock broker before you trade. The collateral can either be in the form of funds transfer into specified stock broker bank accounts or margin pledge of securities from your demat account. The bank accounts are listed on the stock broker website. Please do not transfer funds into any other account. The stock broker is not permitted to accept any cash from you.
3. The stock broker's Risk Management Policy provides details about how the trading limits will be given to you, and the tariff sheet provides the charges that the stock broker will levy on you.
4. All securities purchased by you will be transferred to your demat account within one working day of the payout. In case of securities purchased but not fully paid by you, the transfer of the same may be subject to limited period pledge i.e., seven trading days after the pay-out (CUSPA pledge) created in favor of the stock broker. You can view

[I Agree](#)

STEP 6/6

Know Your Client (KYC)
Application Form (For Individuals Only)

Please fill in ENGLISH and in BLOCK LETTERS.
Fields marked * are mandatory
Fields marked + are pertaining to CKYC and mandatory only if processing CKYC also

CDSL VENTURES LIMITED ...Exploring New Horizons
SBI Securities
Investment aur Trust, Dono

Application No.: WB3599342
Application Type* New KYC Modification KYC

KYC Mode*: Please Tick (✓)
 Normal EKYC OTP EKYC Biometric Online KYC Offline EKYC Digilocker

1. Identity Details (please refer guidelines overleaf)

PAN* _____ Please enclose a duly attested copy of your PAN Card
Name (Same as ID proof): MR _____
Maiden Name* (if any) _____
Fathers/Spouse's Name* MR _____

[Digitally Sign the KYC PDF form](#)

Verify your details and initiate the Digital E-sign to complete your account opening journey

Account Opening Journey Completed



Woahh! Your application successfully submitted for verification

Your application number
WB3399408



Initiated

Your application is initiated



Form Received

Your application form has been received



Application Completed

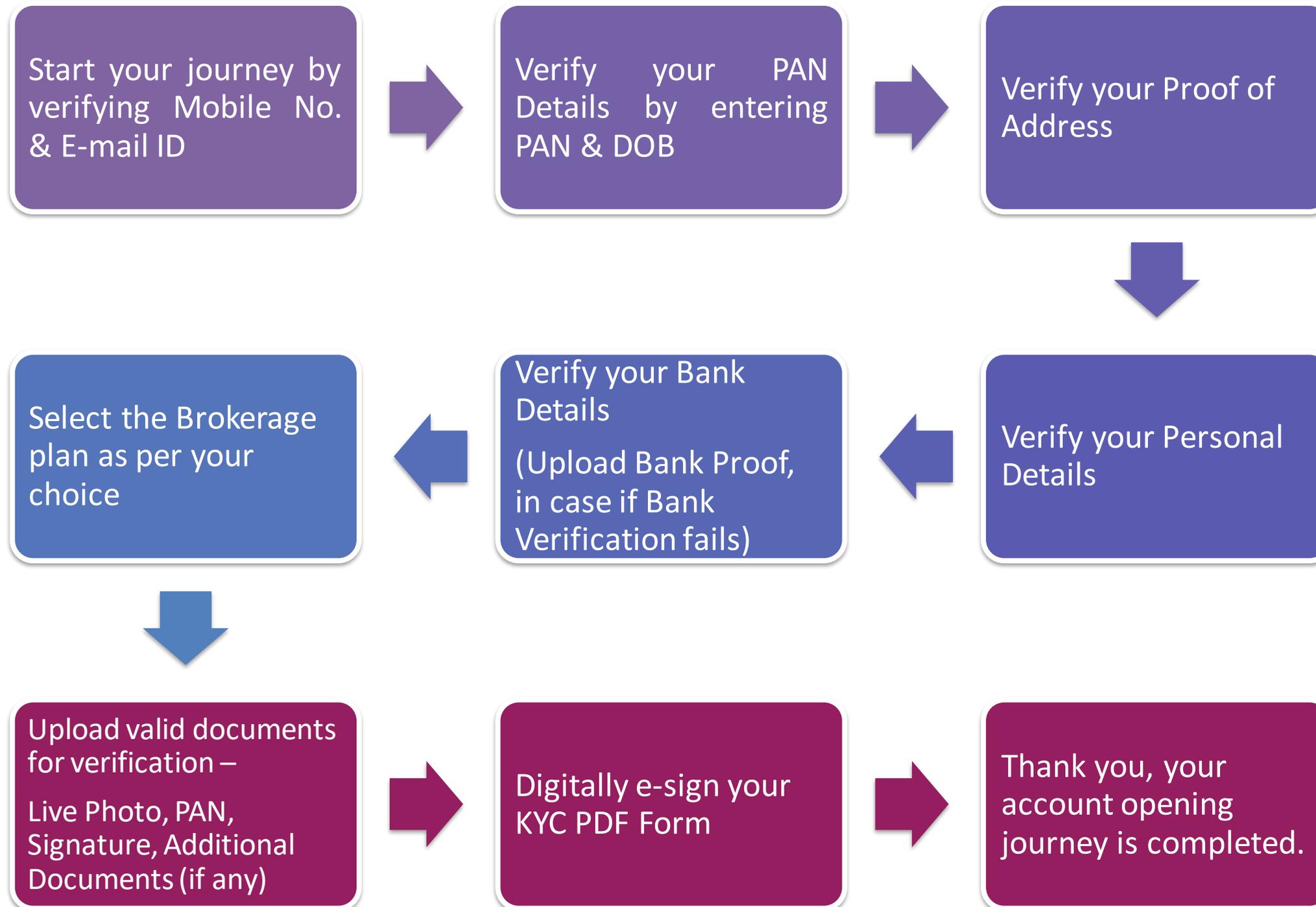
Your application was successfully



Verification

Your application submitted successfully

Walkthrough - Account Opening Journey



Thank You



Investment aur Trust, Dono

www.sbisecurities.in