How to invest in a Systematic Investment Plan (SIP)
Enter your User ID, Password and Security Key / Access Code to log on to your trading account.
Click on Place order -> Mutual Fund -> SIP
Select a Holding Pattern - > View Schemes
Fund/Scheme Type List - > Select Transaction Type “Systematic Investment Plan” - > Select the scheme of your choice & the Folio Number (if required) - > Click on “Place Order”
Fill in the Frequency of Installments and the number of installments. Select a Start Date and fill in the SIP order amount. If you have a trinity account, you can choose to opt for Auto-debit of funds from your linked bank account to the Kotak Mutual Fund account. At the bottom of the page, accept the disclaimer and click on “Place Order”
Accept the Terms and Conditions in order to place your SIP order.
Upon placing your order, an acknowledgement message will appear with a reference number. Please note this number for further queries. You can view your order by clicking on “OK”