

# How to invest in a Systematic Investment Plan (SIP)

 **Login to your Trading Account**

<b>User ID</b>	<input type="text"/>
<b>Password</b> (Case Sensitive)	<input type="password"/> <a href="#">Forgot Password</a>
<b>Security Key / Access Code</b> (Case Sensitive)	<input type="text"/> <a href="#">Forgot Key</a>
	<input type="button" value="Login"/> <input type="button" value="Reset"/>
	<a href="#">Generate Access Code</a> (If you are not a user of Security Key)

**Login Issues**

- › [Forgot Password](#) ?
- › [Forgot Security Key](#) ?
- › [Lost/Damaged Security Key](#) ?
- › [Activate Security Key](#) ?
- › [Didn't get Security Key](#) ?

Enter your User ID, Password and Security Key / Access Code to log on to your trading account.

[Not an account holder ?](#)





Equity	Derivatives	Mutual Fund	Primary
Stocks	Index F&O	Purchase	IPO
Sell From Existing	Stock F&O	Redeem/Switch	OFS
Basket Order	Currency F&O	SIP	Bonds&
GTC Order	Global Indices	Transfer to Online	
Auto Invest	Basket Order		
Celebration SIP			
Bonds&ETFs			



Click on  
Place order ->  
Mutual Fund ->  
SIP

atives



### Order Placement for MutualFund

Client Code	PXF23
Available Fund in Mutual Fund account	Rs.1,960,650,234.00
Holding Pattern	--Select--
View Schemes	<input checked="" type="radio"/> Fund wise <input type="radio"/> Scheme Type wise
Transaction Type	Systematic Investment Plan
Fund / Scheme Type List	Select Funds/Scheme
Schemes Available	Select A Scheme
	<a href="#">PLACE ORDER</a>



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”

Frequency (in Months)	<input type="text" value="1"/>		
No. of Installments	<input type="text"/>		
Start Date	Day	Month	Year
	<input type="text" value="01"/>	<input type="text" value="1"/>	<input type="text" value="2015"/>
Auto Debit Facility	<input type="checkbox"/> ?		
SIP Order Amount	Rs. <input type="text"/>	in Words	<input type="text"/>
Aggregate Investment Amount	Rs. <input type="text"/>		
Processing fees per installment	Rs. <input type="text"/>		
Service Tax @ 0.00%	Rs. <input type="text"/>		
Installement Amount	Rs. <input type="text"/>		
PAN No	<input type="text" value="ATLPK1104F"/>		

[View Schemewise Date Details](#)

• [Click here to view Commission receivable by Kotak Securities Ltd from various mutualfund houses](#)

- I/We hereby confirm that the EUIN number is not applicable to the said transaction as this is an "execution-only" transaction without any interaction or advice by the employee/relationship manager/sales person of Kotak Securities Ltd or notwithstanding the advice of in-
- appropriateness, if any, provided by the employee/relationship manager/salesperson of Kotak Securities Ltd and the distributor has not charged any advisory fees on this transaction.
- I CONFIRM that, Kotak Securities Limited has disclosed to me/us all the commissions (in the form of trail commission or any othermode), payable to them by the Mutual Fund houses for different competing Schemes of various Mutual Funds".

 

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"



### Terms & Conditions for Mutual Fund

#### Terms and Conditions

For Online Investing in Mutual Funds These terms and conditions are in addition to and binding on the existing Power of Attorney which has been signed by you at the time of your becoming our client.

#### Definitions :

"Unit" shall mean the interest of an investor, which consists of one undivided share in the Net Assets of the Scheme.

"Net Asset Value (NAV)" of the Units of the Scheme will be computed by dividing the net assets of the Scheme by the number of units as on the date.

"Purchase" shall mean subscription to the units of the various schemes of the Mutual Fund.

"Redemption" shall mean sale of the units of the various schemes of the Mutual Fund.

**Note :** Kindly agree to the terms and conditions mentioned above. This is required for our records.

ACCEPT

DECLINE



Accept the Terms and Conditions in order to place your SIP order.



Acknowledgement Of Your Request

Your SIP Order request has been accepted by kotaksecurities.com  
An email will be sent to you on confirmation or rejection of SIP installments. Please ensure that funds are available in your Mutual Fund limits on the SIP installment due dates before the site-cut off time for the scheme.  
Your Transaction Reference Number is [SIP40188].

OK



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"