

Flow for fresh Mutual Fund Investments with us



- Go to www.kotaksecurities.com
- Log-in to trade
- Enter your credentials
- Click on More option
- Click on Mutual Funds (next slide)
- Follow the black arrows to click as you proceed

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kotak Securities

Products Pricing Research Help More

Account Login Open Demat Account

**I don't give a buck.
You shouldn't either.**

Pay No Brokerage

ZERO for Delivery Trades
ZERO for Intraday and F&O Trades

Ur
N
+Fre
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C

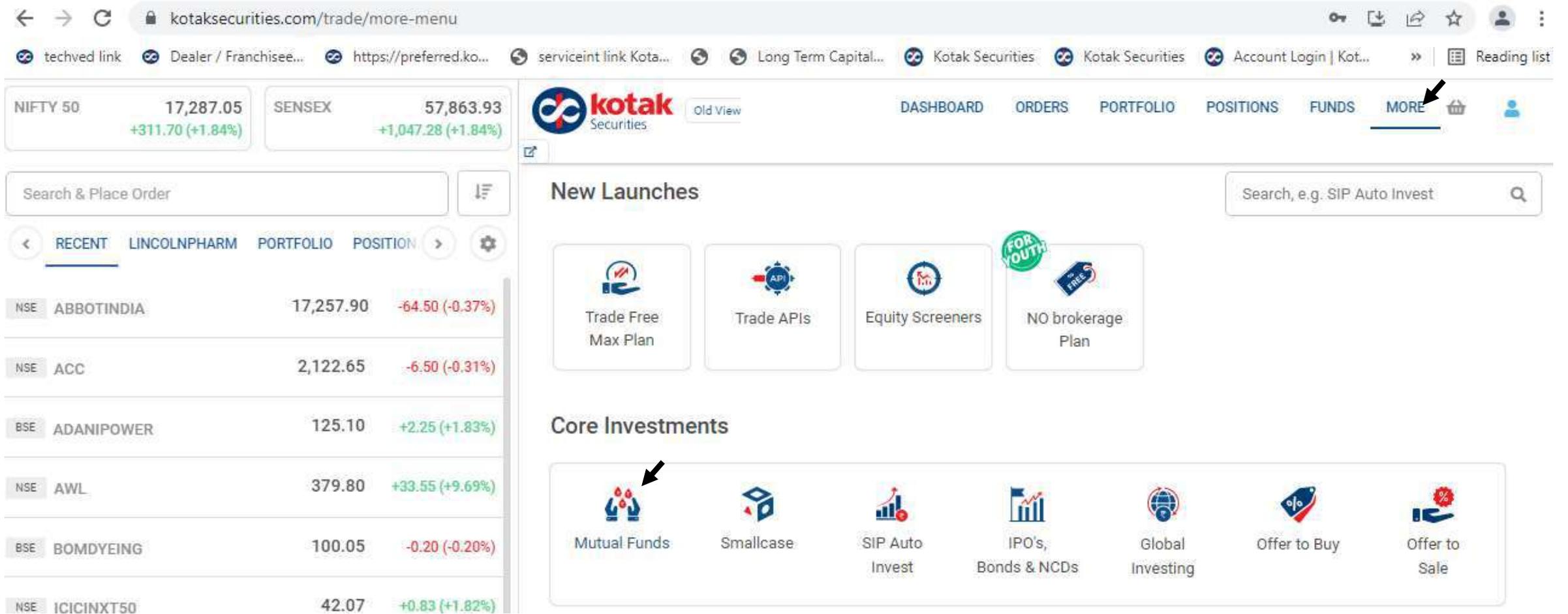
Refer a friend
and share more than good times

Earn
₹ 500
for every referral

+10%
brokerage benefit

New Flow for Mutual Fund Investments

After entering your Kotak Securities Trading Credentials and access code you will be redirected to the below page.



The screenshot displays the Kotak Securities trading platform interface. At the top, the browser address bar shows 'kotaksecurities.com/trade/more-menu'. The navigation menu includes 'DASHBOARD', 'ORDERS', 'PORTFOLIO', 'POSITIONS', 'FUNDS', and 'MORE', with an arrow pointing to 'MORE'. The 'MORE' menu is expanded, showing 'Mutual Funds' with an arrow pointing to it, along with 'Smallcase', 'SIP Auto Invest', 'IPO's, Bonds & NCDs', 'Global Investing', 'Offer to Buy', and 'Offer to Sale'.

Market data at the top left shows:

NIFTY 50	17,287.05	SENSEX	57,863.93
+311.70 (+1.84%)		+1,047.28 (+1.84%)	

Recent trades table:

SECTOR	STOCK	PRICE	CHANGE
NSE	ABBOTINDIA	17,257.90	-64.50 (-0.37%)
NSE	ACC	2,122.65	-6.50 (-0.31%)
BSE	ADANIPOWER	125.10	+2.25 (+1.83%)
NSE	AWL	379.80	+33.55 (+9.69%)
BSE	BOMDYEING	100.05	-0.20 (-0.20%)
NSE	ICICINXT50	42.07	+0.83 (+1.82%)

New Launches section includes:

- Trade Free Max Plan
- Trade APIs
- Equity Screeners
- NO brokerage Plan (FOR YOUTH)

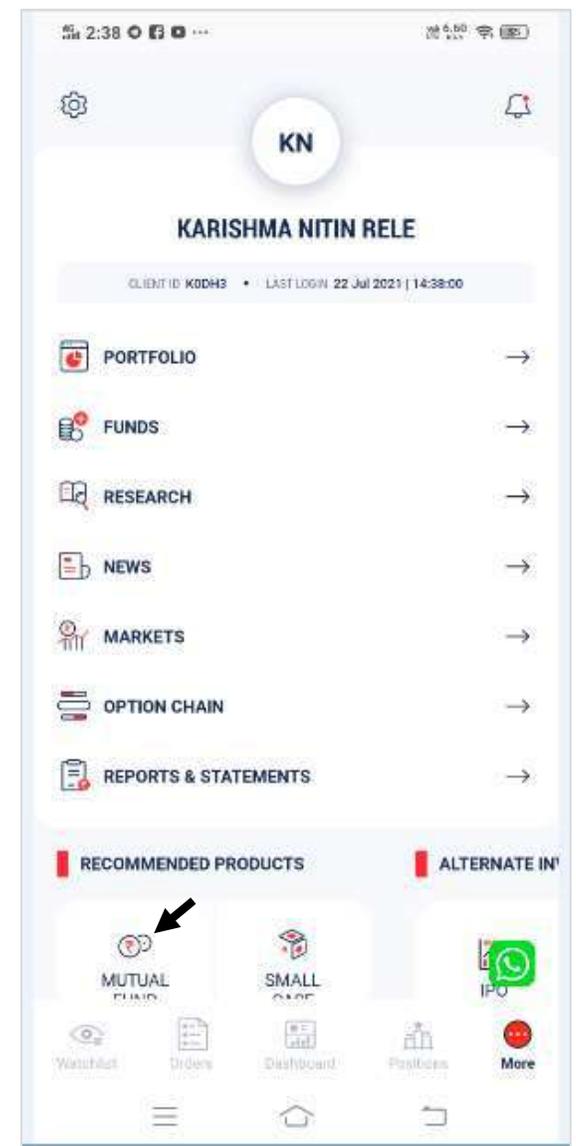
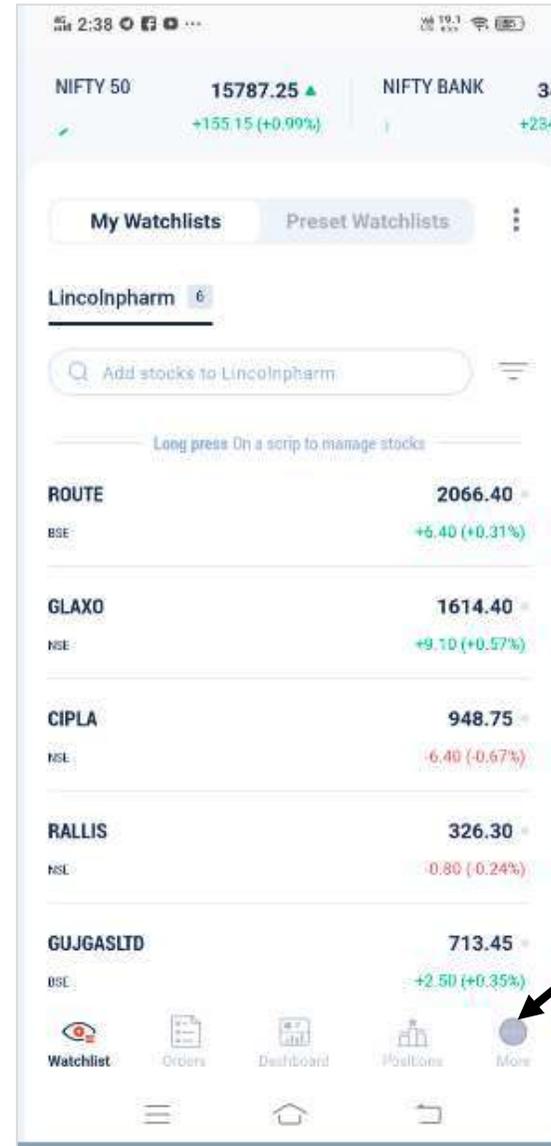
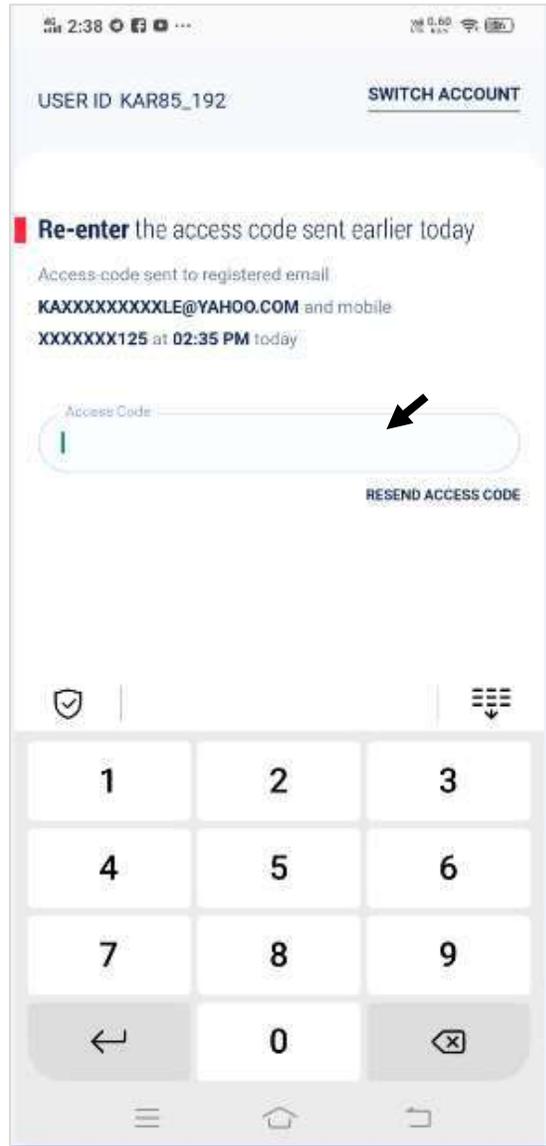
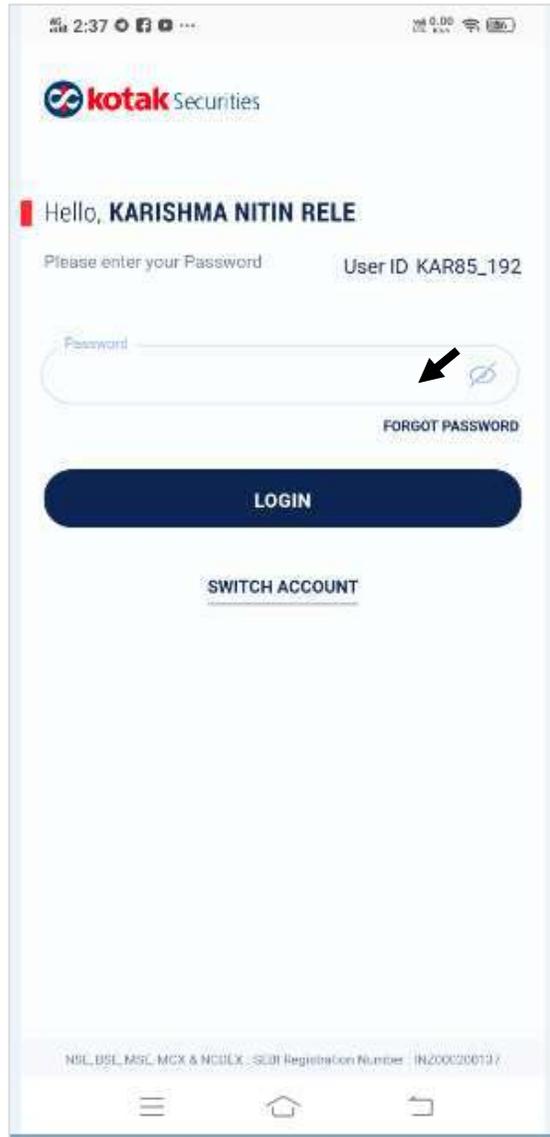
Core Investments section includes:

- Mutual Funds
- Smallcase
- SIP Auto Invest
- IPO's, Bonds & NCDs
- Global Investing
- Offer to Buy
- Offer to Sale

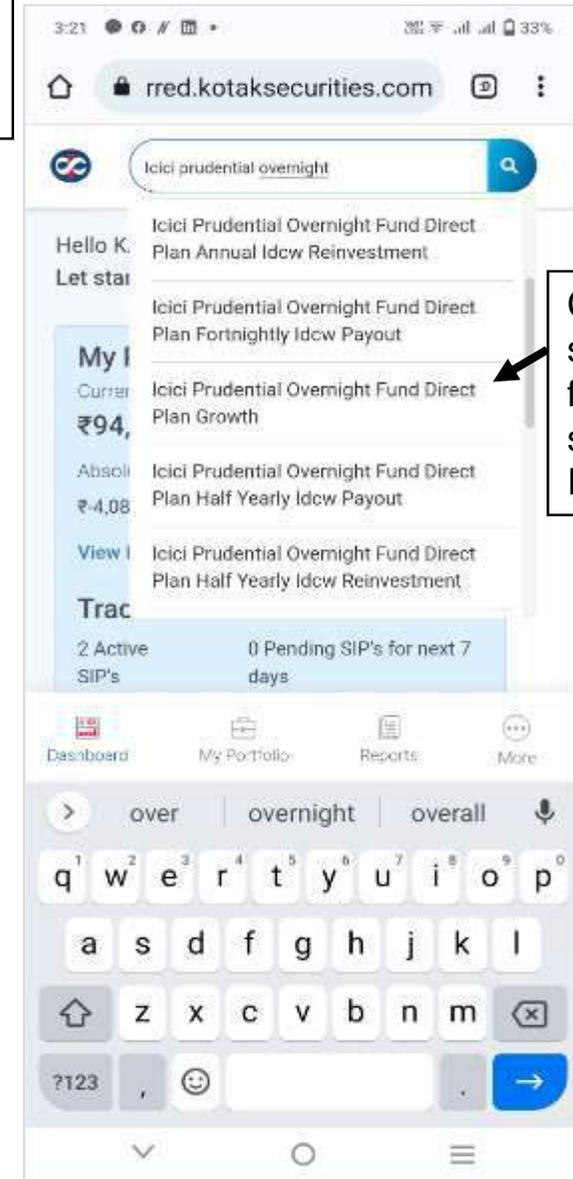
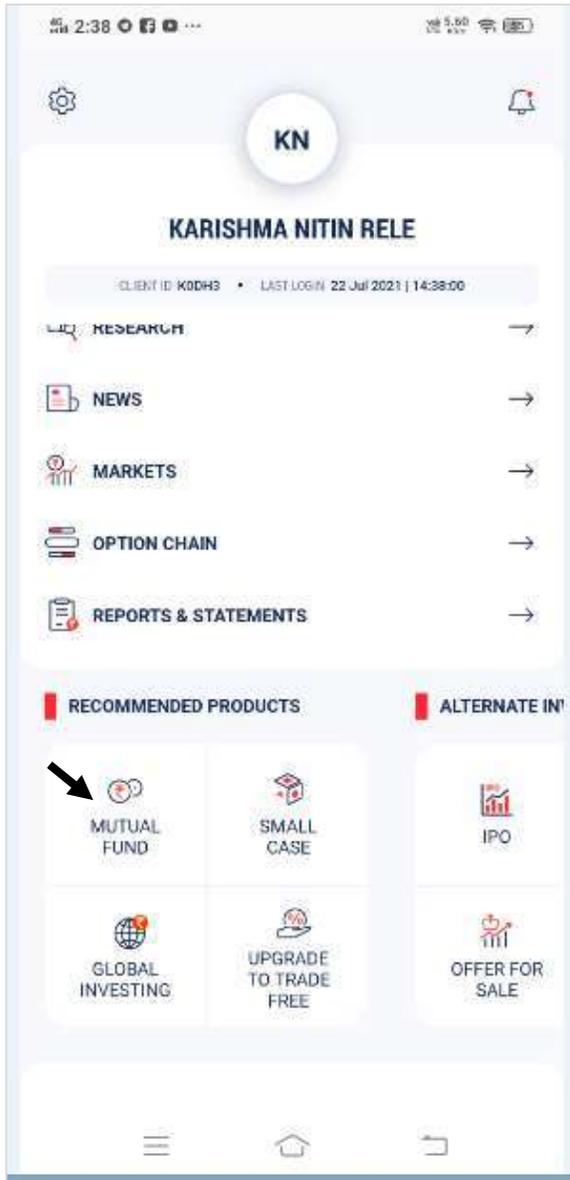
Flow for New Mutual Fund Investments with us



Or you could also Login through our Kotak Stock Trader App

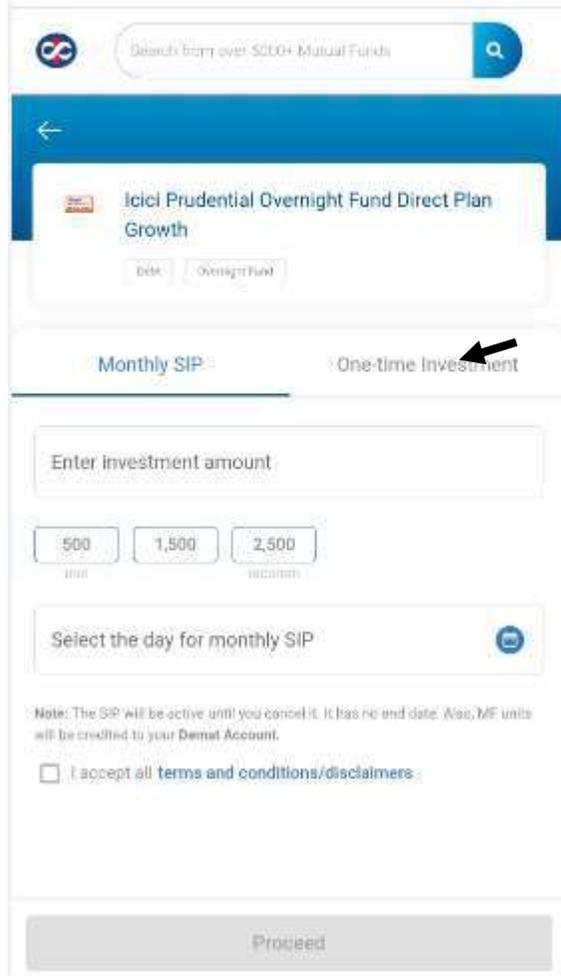


Flow for New Mutual Fund Investments



Flow for New Mutual Fund Investments

For Lumpsum click on One-time Investment



Search from over 5000+ Mutual Funds

Icici Prudential Overnight Fund Direct Plan Growth

Investment Type: **One-time Investment**

Enter investment amount

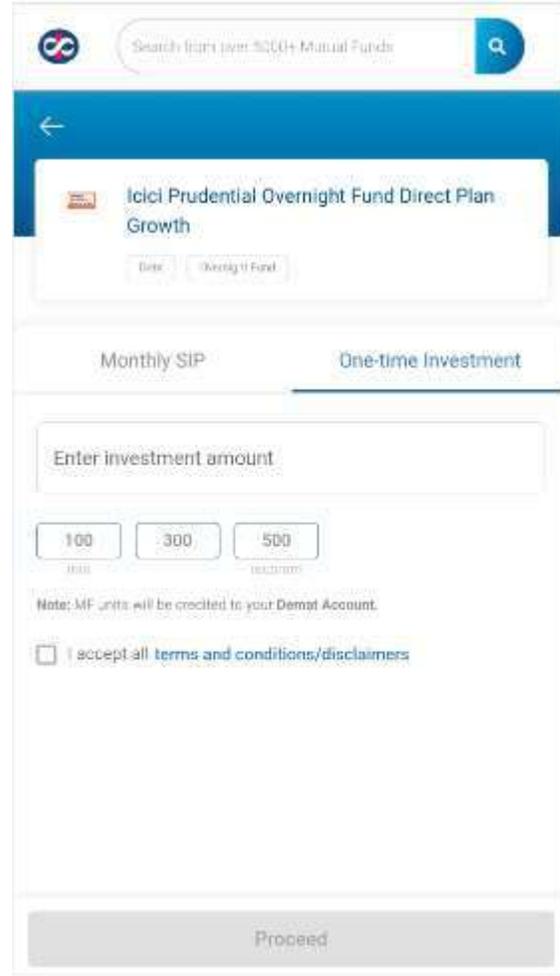
500 1,500 2,500

Select the day for monthly SIP

Note: The SIP will be active until you cancel it. It has no end date. Also, MF units will be credited to your Demat Account.

I accept all terms and conditions/disclaimers

Proceed



Search from over 5000+ Mutual Funds

Icici Prudential Overnight Fund Direct Plan Growth

Investment Type: **One-time Investment**

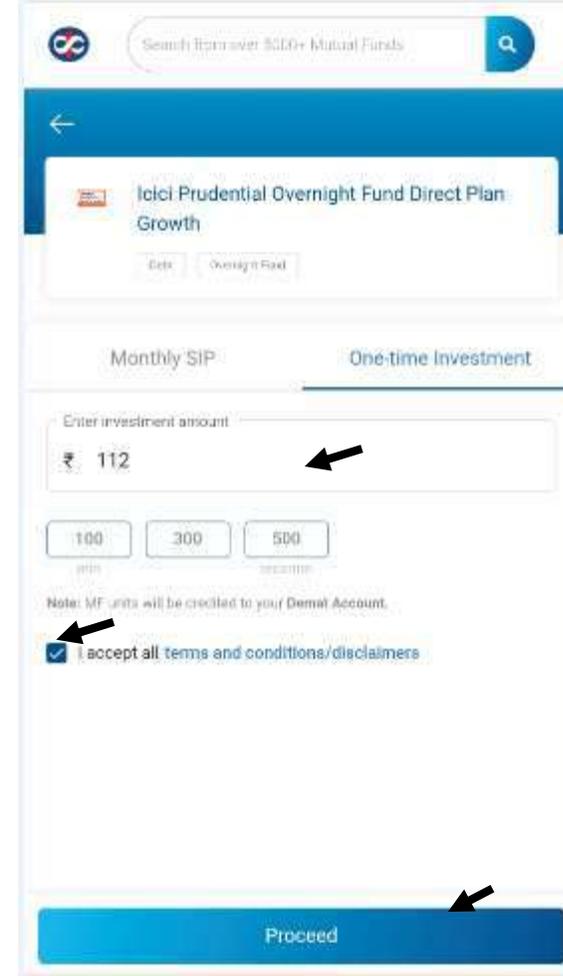
Enter investment amount

100 300 500

Note: MF units will be credited to your Demat Account.

I accept all terms and conditions/disclaimers

Proceed



Search from over 5000+ Mutual Funds

Icici Prudential Overnight Fund Direct Plan Growth

Investment Type: **One-time Investment**

Enter investment amount

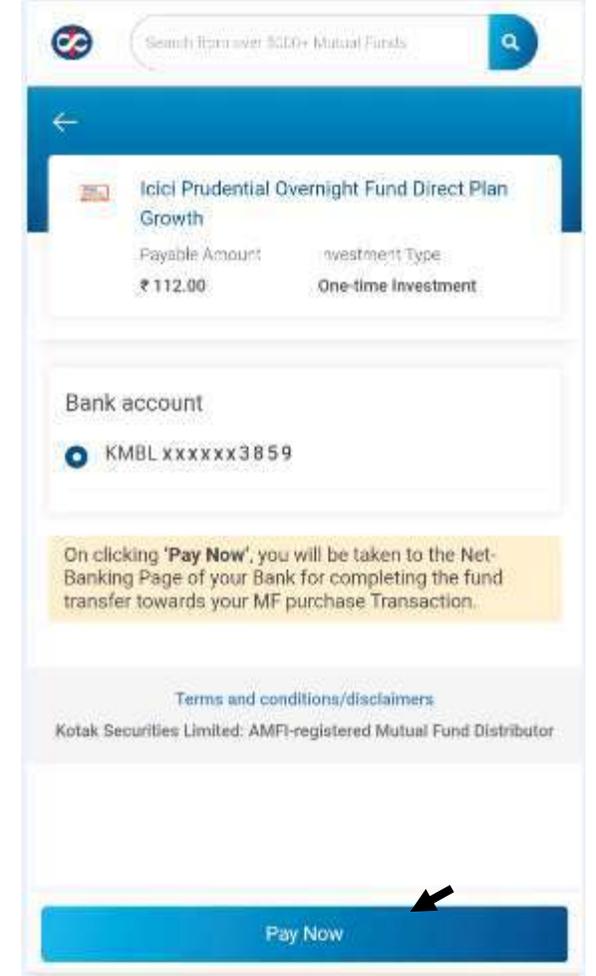
₹ 112

100 300 500

Note: MF units will be credited to your Demat Account.

I accept all terms and conditions/disclaimers

Proceed



Search from over 5000+ Mutual Funds

Icici Prudential Overnight Fund Direct Plan Growth

Payable Amount: ₹ 112.00

Investment Type: **One-time Investment**

Bank account

KMBL xxxxxx3859

On clicking 'Pay Now', you will be taken to the Net-Banking Page of your Bank for completing the fund transfer towards your MF purchase Transaction.

[Terms and conditions/disclaimers](#)

Kotak Securities Limited: AMFI-registered Mutual Fund Distributor

Pay Now

Flow for New Mutual Fund Investments

Please wait until you are re-directed to the Net Banking page of the Bank



3:23 kotak.com/pmtgt/ksecl

Login Via Net / Mobile Banking Login Via Debit Card

Select CRN Username

Enter CRN or Customer ID

What is my CRN?

Enter Net Banking Password or MPin

Enter Net Banking Password or MPIN (N

Forgot/Blocked Password?

By clicking on 'Secure Login', you accept that you have read our Terms & conditions - Privacy Policy, and the Tips for Safe Banking

SECURE LOGIN

Entrust

Privacy - Terms

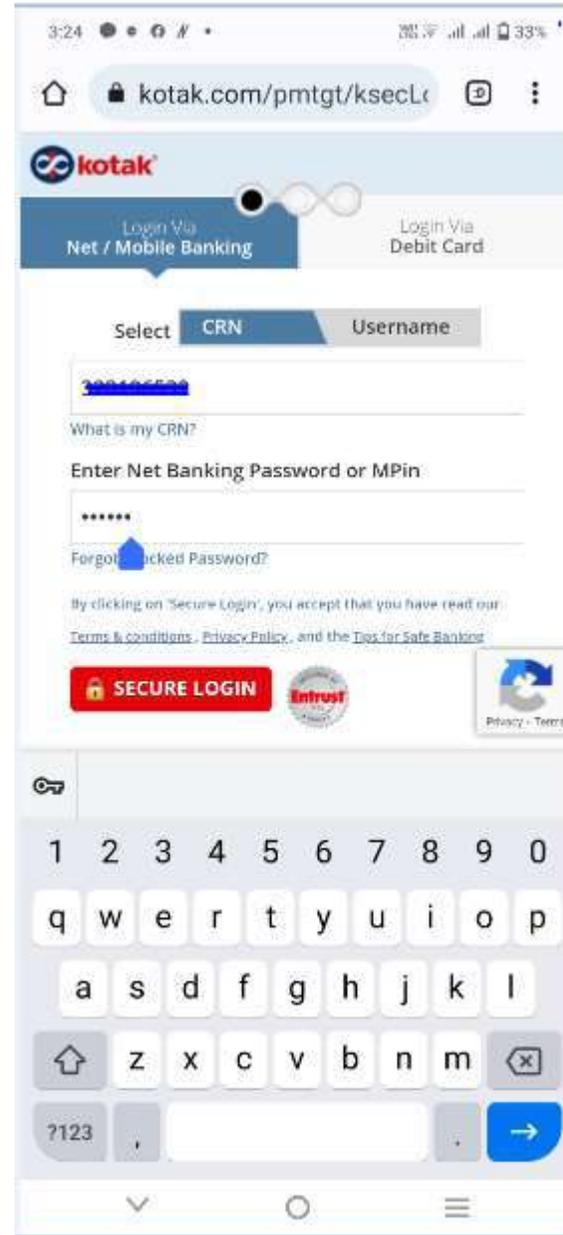
1 2 3 4 5 6 7 8 9 0

q w e r t y u i o p

a s d f g h j k l

z x c v b n m

7123



3:24 kotak.com/pmtgt/ksecl

Login Via Net / Mobile Banking Login Via Debit Card

Select CRN Username

Enter CRN or Customer ID

What is my CRN?

Enter Net Banking Password or MPin

Enter Net Banking Password or MPIN (N

Forgot/Blocked Password?

By clicking on 'Secure Login', you accept that you have read our Terms & conditions - Privacy Policy, and the Tips for Safe Banking

SECURE LOGIN

Entrust

Privacy - Terms

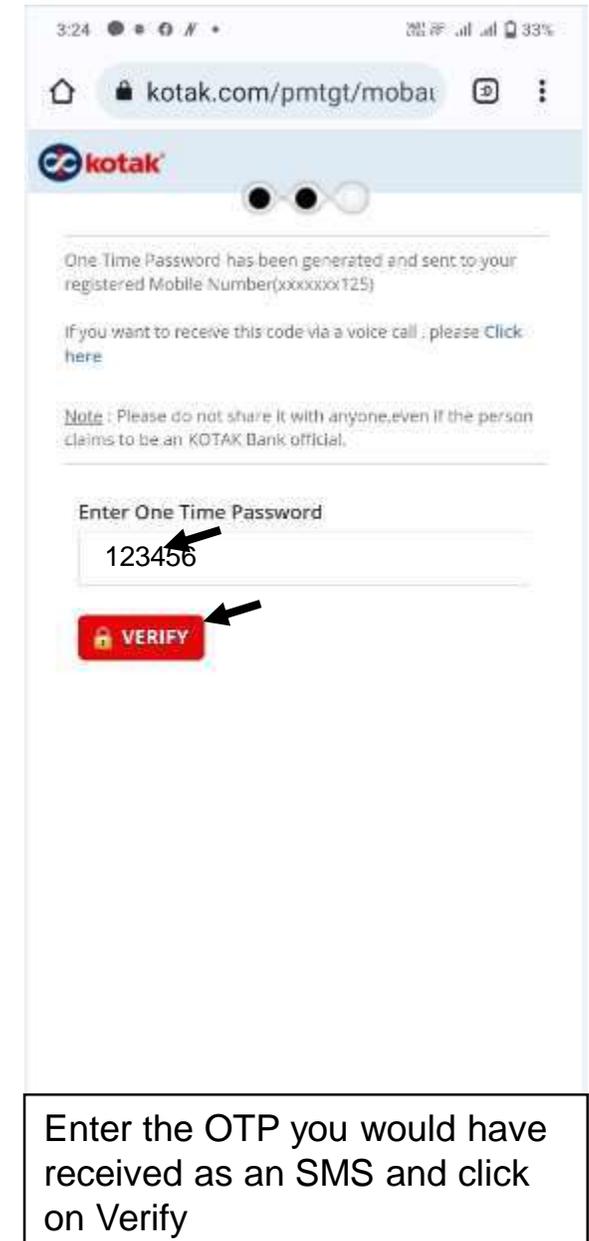
1 2 3 4 5 6 7 8 9 0

q w e r t y u i o p

a s d f g h j k l

z x c v b n m

7123



3:24 kotak.com/pmtgt/moba

One Time Password has been generated and sent to your registered Mobile Number(XXXXXX125)

If you want to receive this code via a voice call : please Click here

Note : Please do not share it with anyone,even if the person claims to be an KOTAK Bank official.

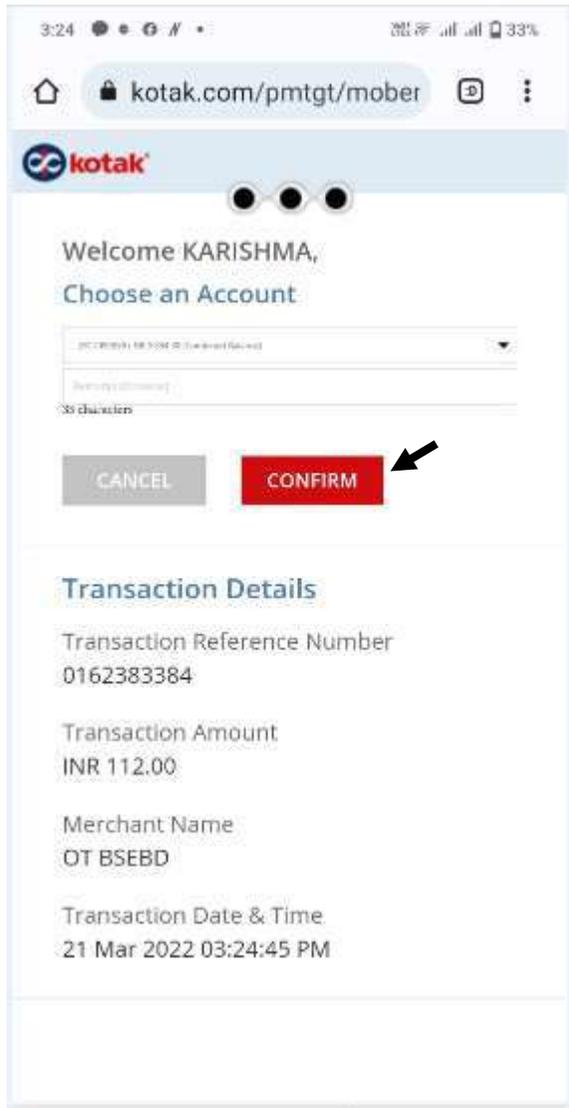
Enter One Time Password

123456

VERIFY

Enter the OTP you would have received as an SMS and click on Verify

Flow for New Mutual Fund Investments



3:24 33%
kotak.com/pmtgt/mober

Welcome KARISHMA,
Choose an Account

[Account Selection Dropdown]

[CANCEL] [CONFIRM]

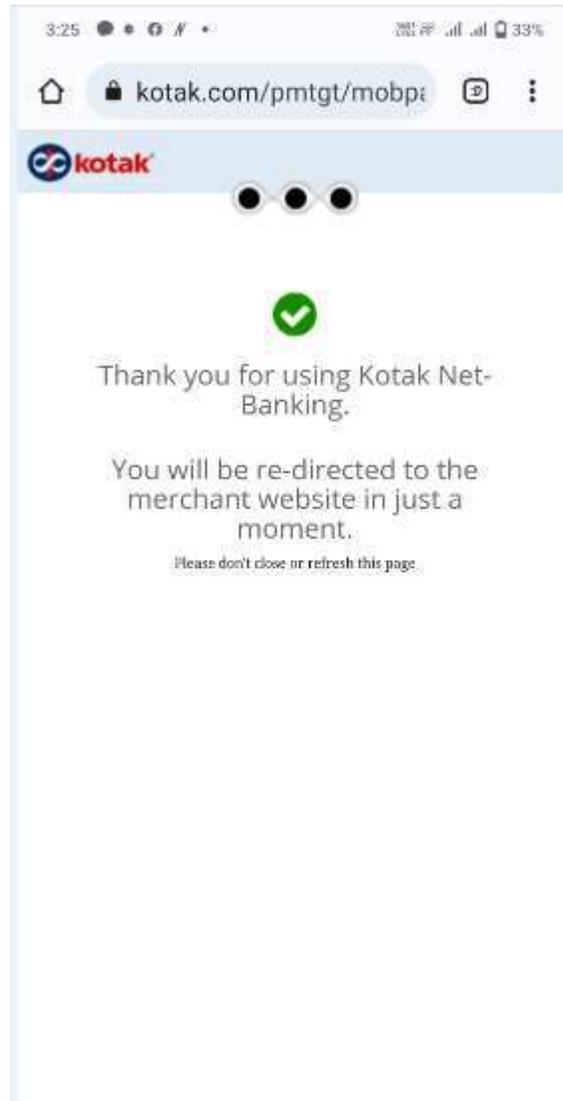
Transaction Details

Transaction Reference Number
0162383384

Transaction Amount
INR 112.00

Merchant Name
OT BSEBD

Transaction Date & Time
21 Mar 2022 03:24:45 PM

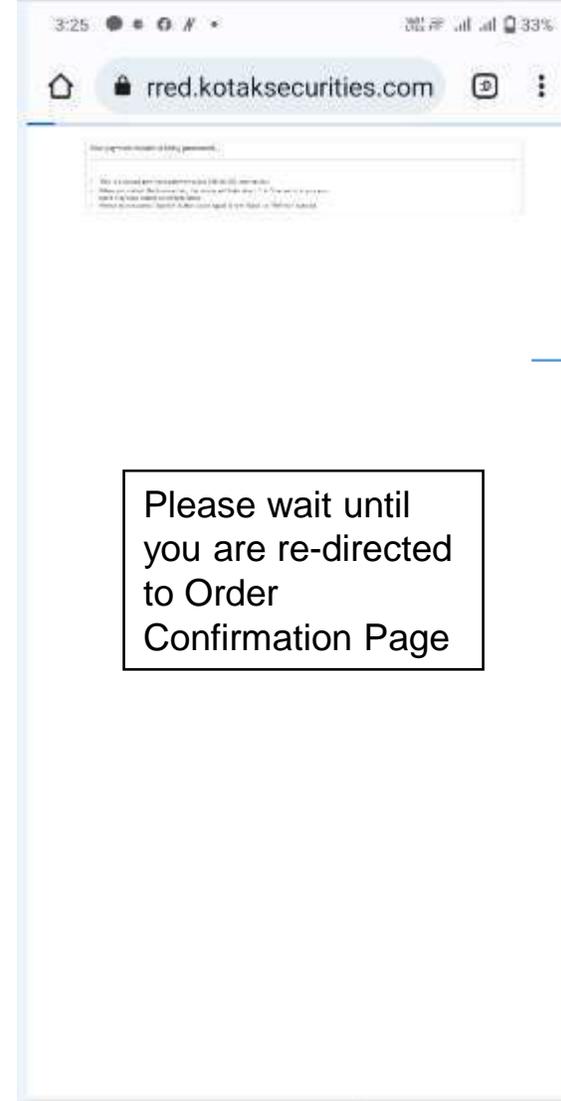


3:25 33%
kotak.com/pmtgt/mobp

Thank you for using Kotak Net-Banking.

You will be re-directed to the merchant website in just a moment.

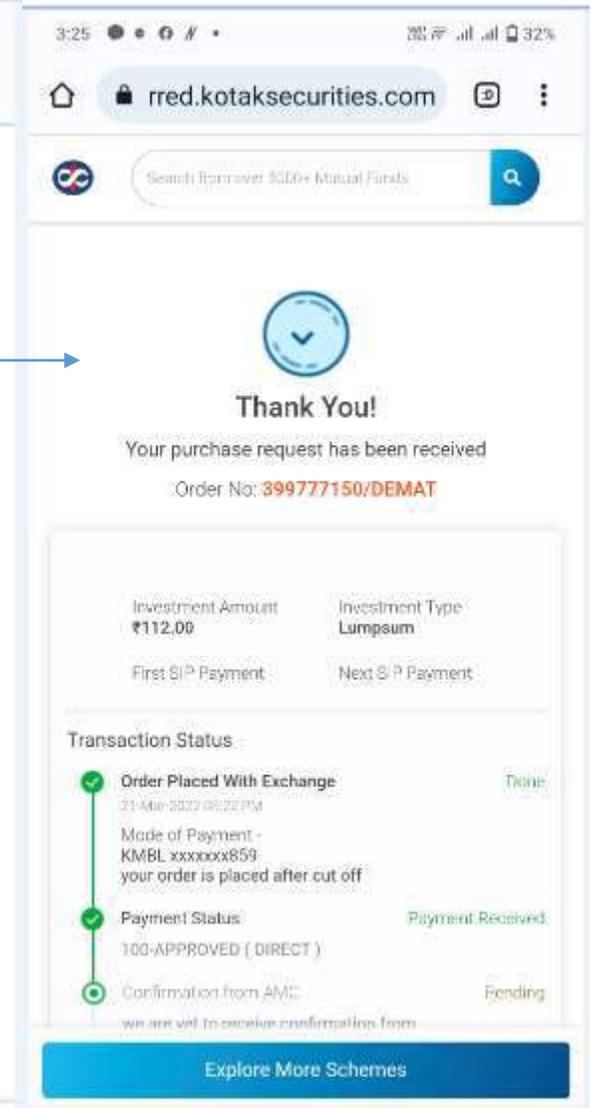
Please don't close or refresh this page.



3:25 33%
rred.kotaksecurities.com

[Loading Spinner]

Please wait until you are re-directed to Order Confirmation Page



3:25 32%
rred.kotaksecurities.com

Thank You!

Your purchase request has been received

Order No: **399777150/DEMAT**

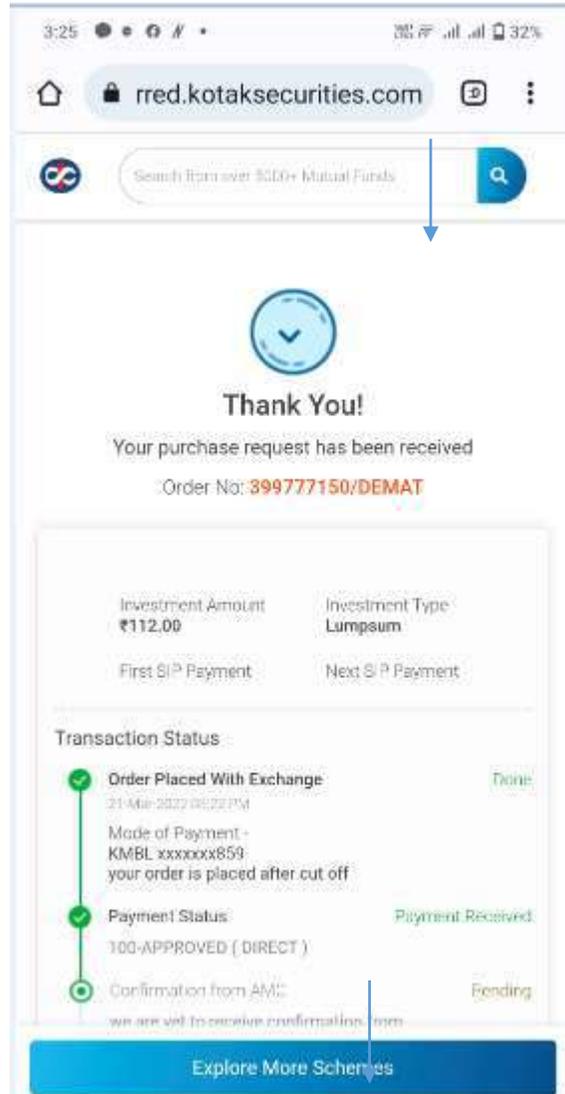
Investment Amount ₹112.00	Investment Type Lumpsum
First SIP Payment	Next SIP Payment

Transaction Status

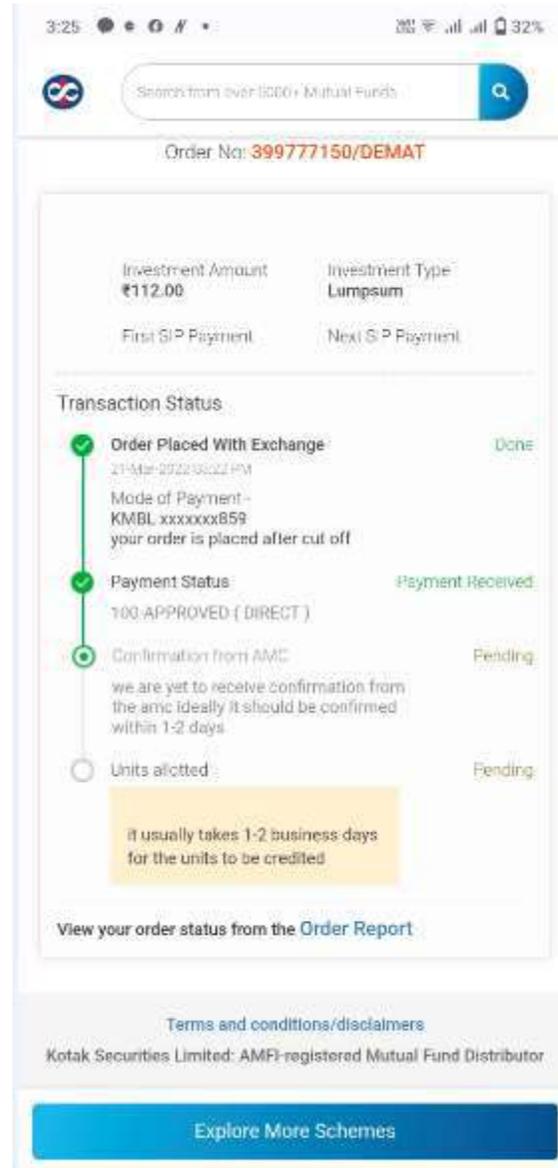
- Order Placed With Exchange Done
21-Mar-2022 03:22 PM
Mode of Payment - KMBL xxxxxx859
your order is placed after cut off
- Payment Status Payment Received
100-APPROVED (DIRECT)
- Confirmation from AMC: Pending
we are yet to receive confirmation from

Explore More Schemes

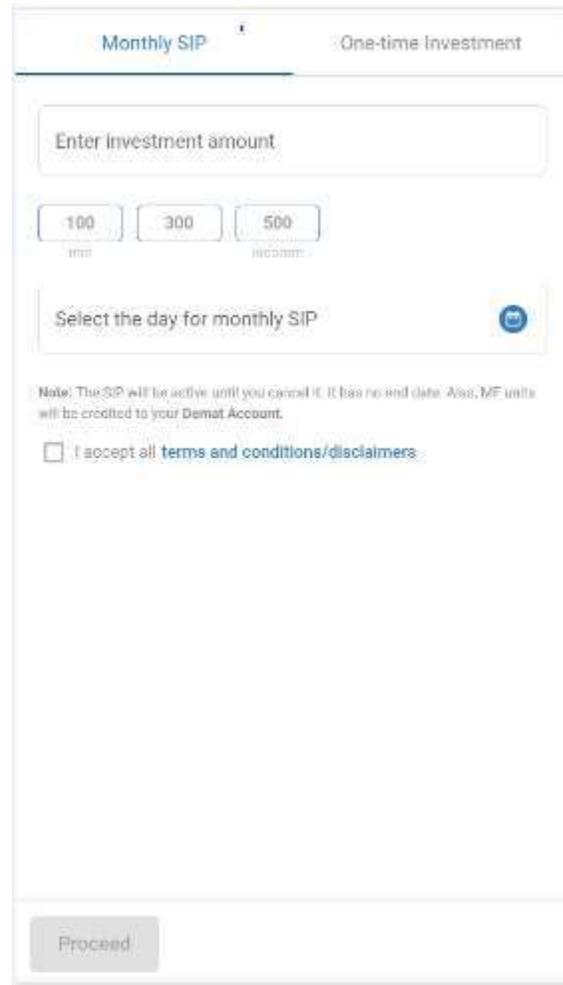
Flow for New Mutual Fund Investments



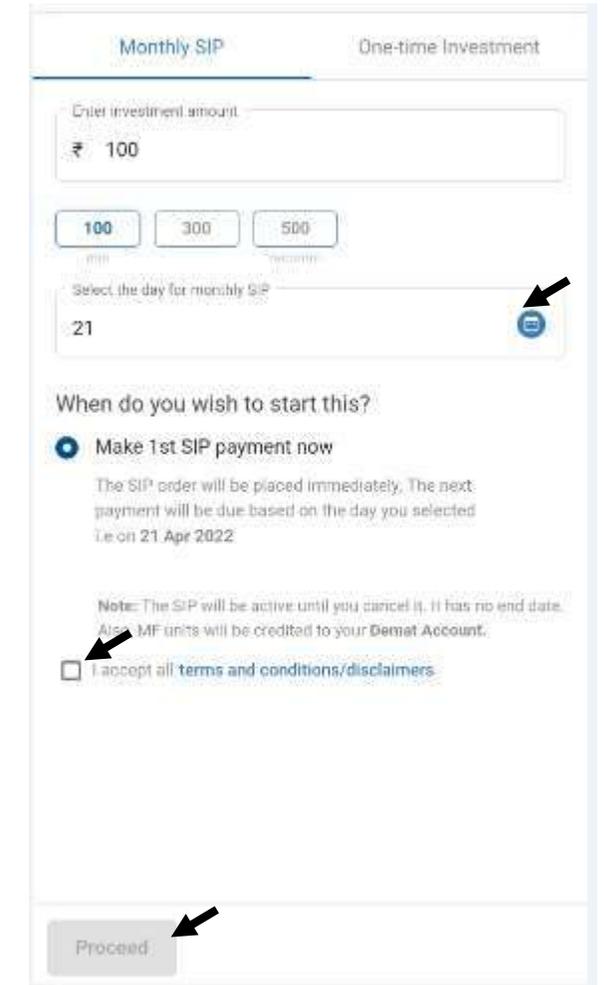
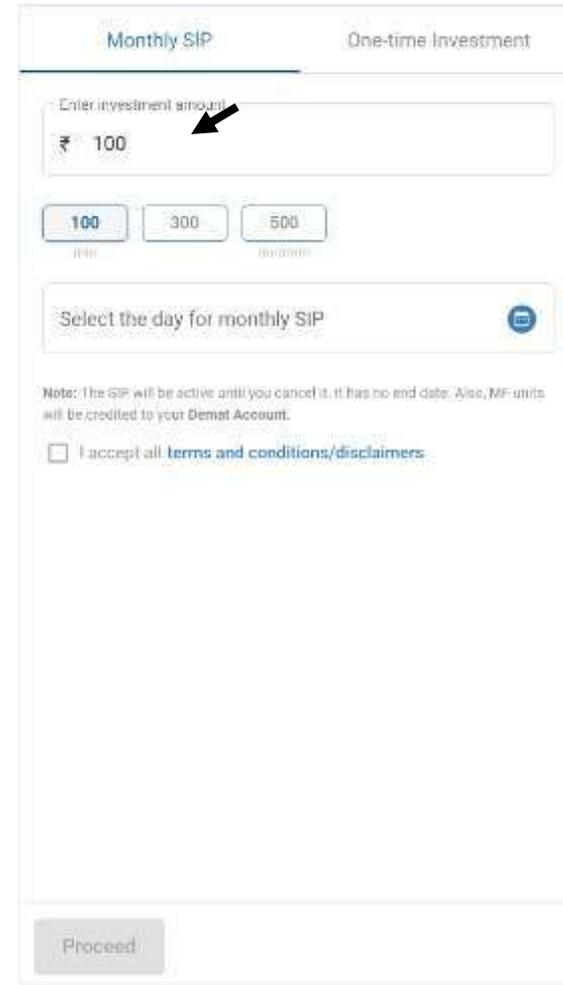
Scroll down to view Complete Order details



Flow for New Mutual Fund Investments

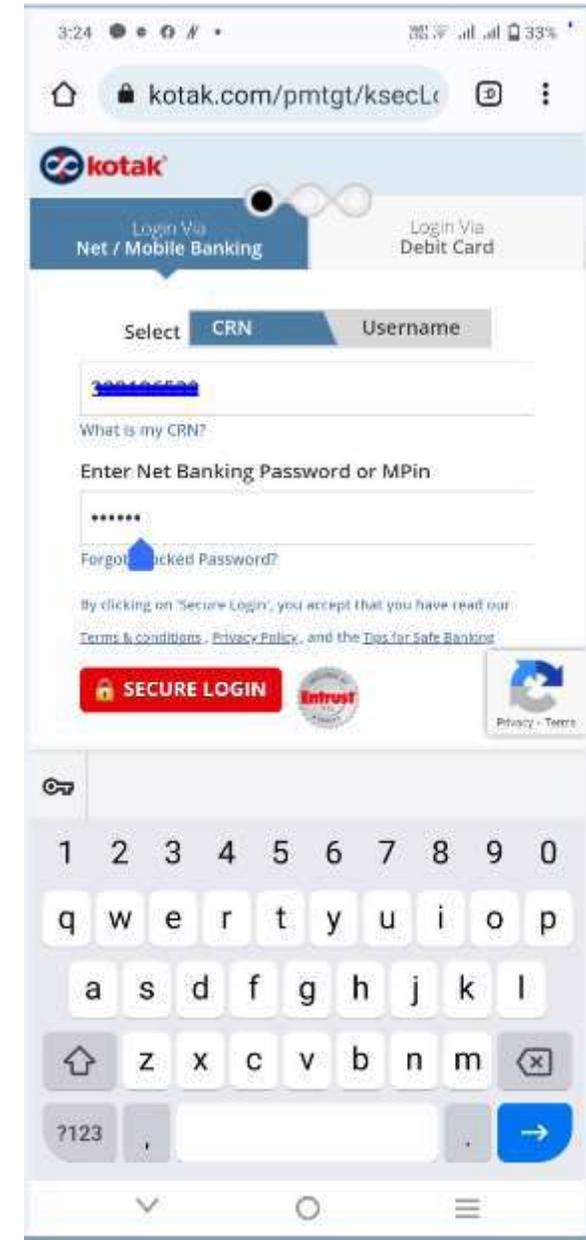
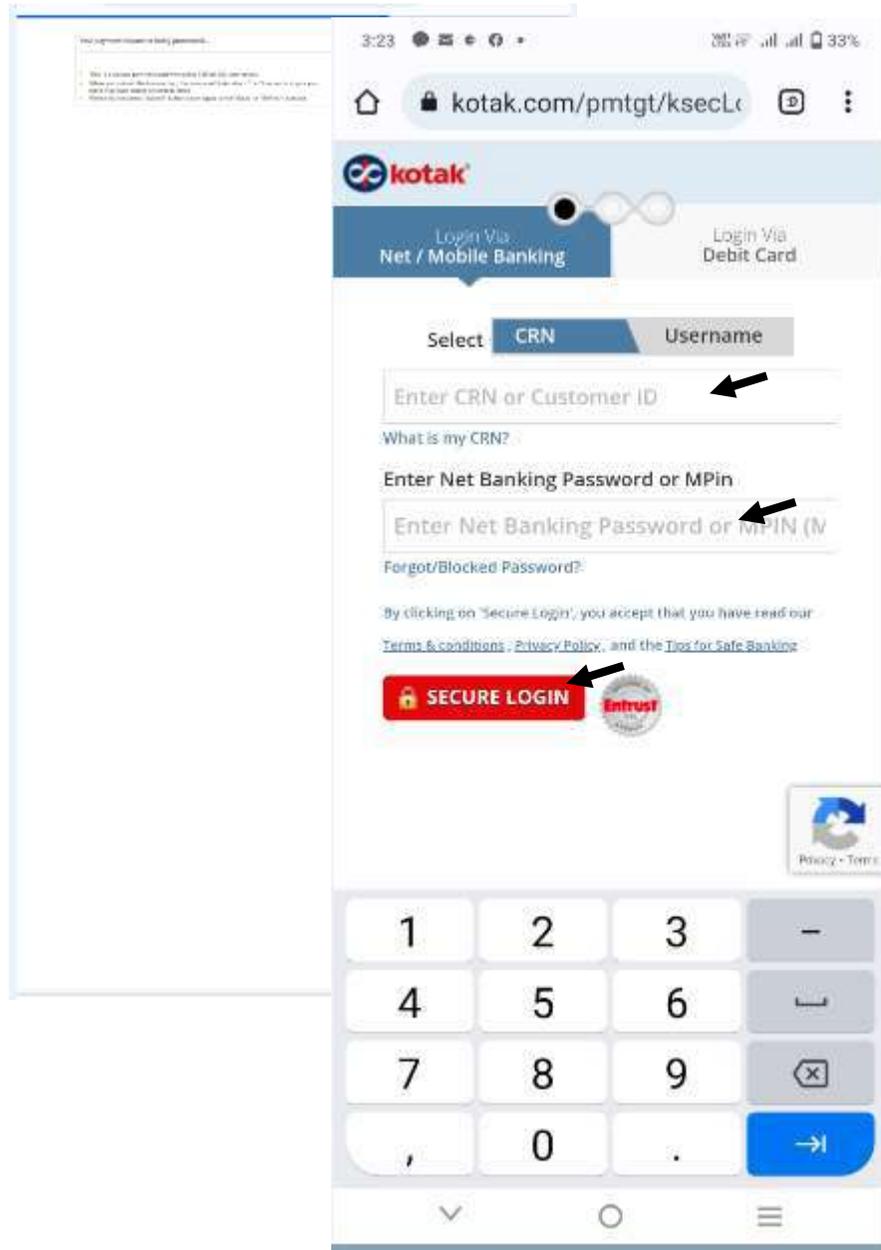
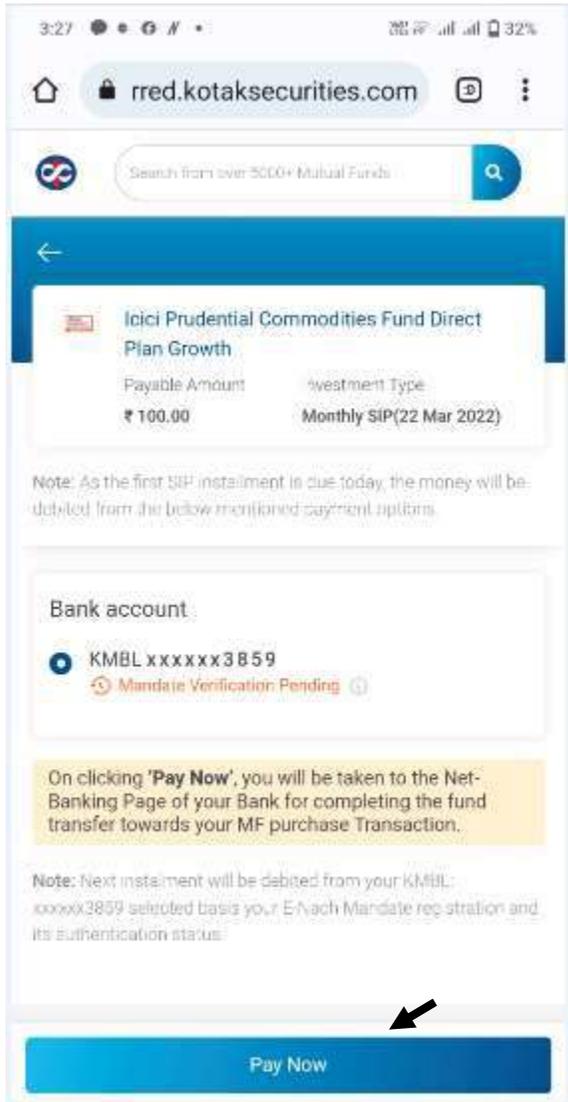


Similarly you can set up a monthly SIP by clicking on Invest Now

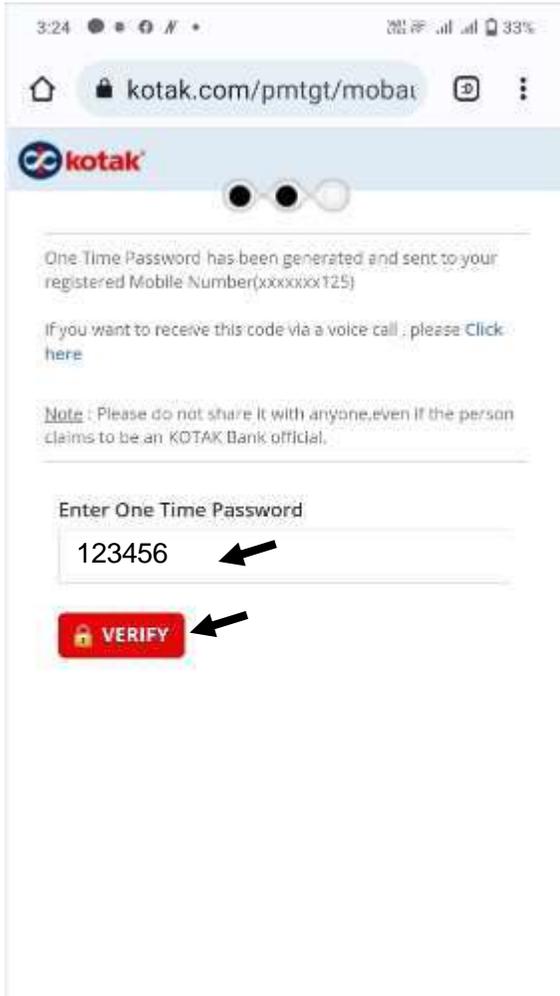


Enter Investment Amt, Select date for monthly SIP, Accept, T&C and then click on Proceed

Flow for New Mutual Fund Investments



Flow for New Mutual Fund Investments



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kotak

One Time Password has been generated and sent to your registered Mobile Number(xxxxxxx125)

If you want to receive this code via a voice call ; please Click here

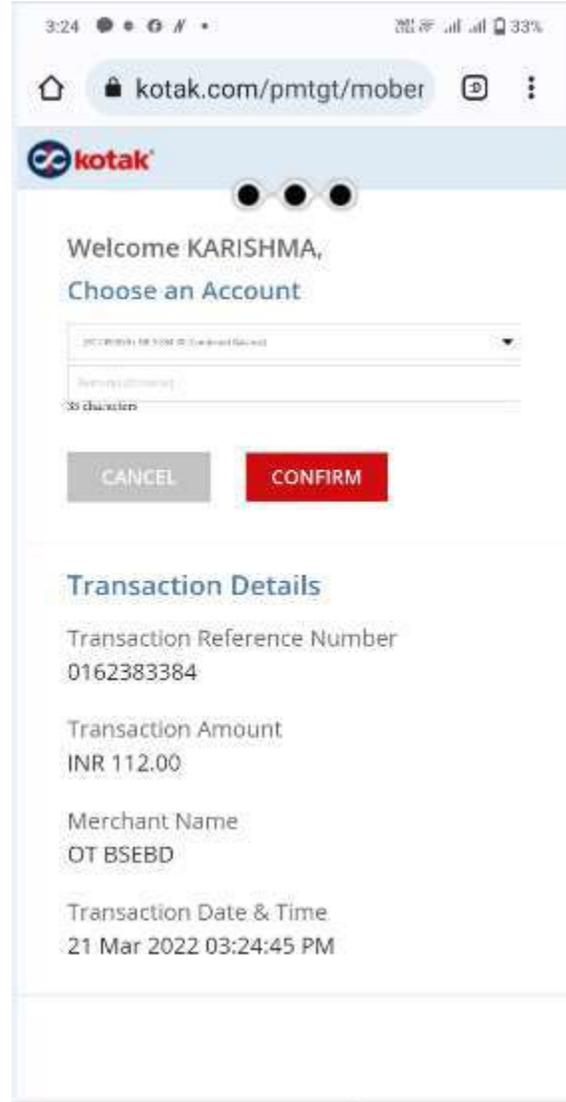
Note : Please do not share it with anyone,even if the person claims to be an KOTAK Bank official.

Enter One Time Password

123456

VERIFY

Enter the OTP you would have received as an SMS and click on Verify



3:24 33%

kotak.com/pmtgt/mober

kotak

Welcome KARISHMA,
Choose an Account

33 characters

CANCEL **CONFIRM**

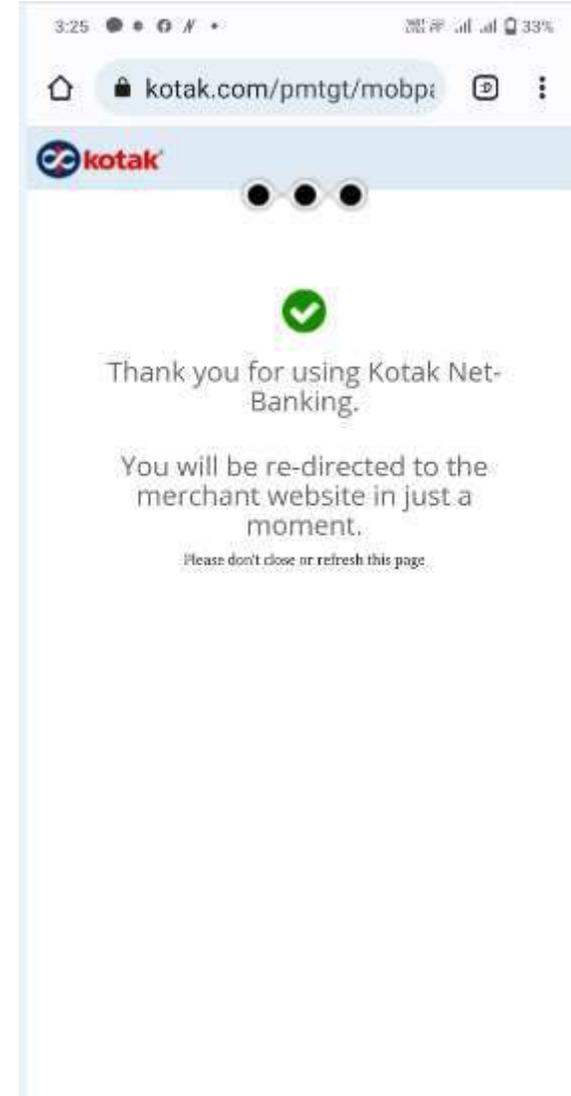
Transaction Details

Transaction Reference Number
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Transaction Amount
INR 112.00

Merchant Name
OT BSEBD

Transaction Date & Time
21 Mar 2022 03:24:45 PM



3:25 33%

kotak.com/pmtgt/mobp

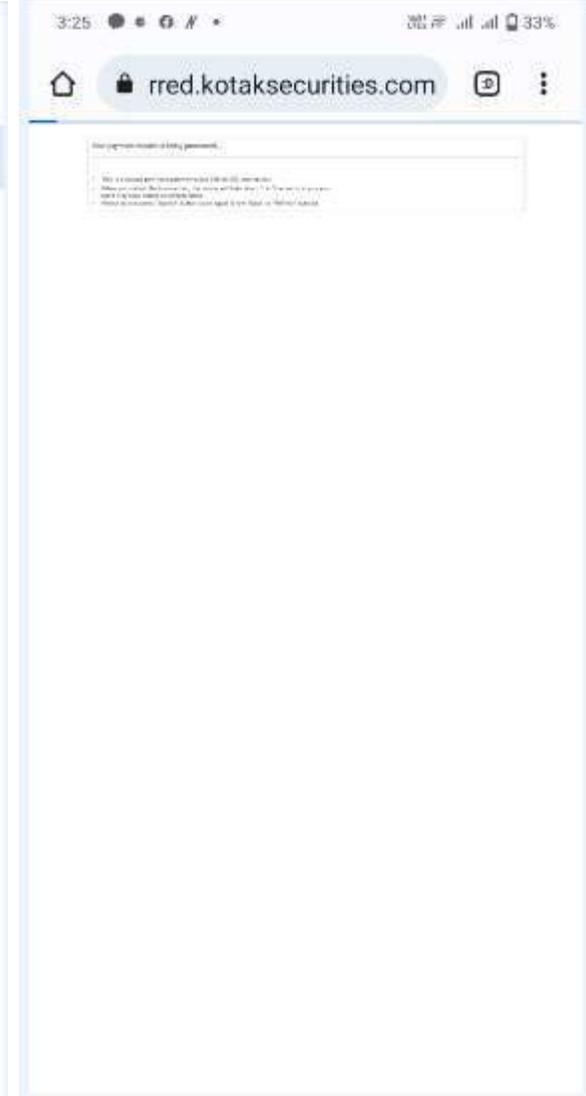
kotak



Thank you for using Kotak Net-Banking.

You will be re-directed to the merchant website in just a moment.

Please don't close or refresh this page.



3:25 33%

rred.kotaksecurities.com

Warning: Invalid or expired session.
You are being redirected to the merchant website. Please do not close or refresh this page.
Please do not close or refresh this page.

Flow for New Mutual Fund Investments



Thank You!

Your purchase request has been received
SIP registration No: **23666983/DEMAT**

Your E-Nach Mandate has been auto-generated for:

ICICI BANK LTD xxxxxxxx584

Amount	From Date	To Date
₹ 1,00,000.00	10 Jan 2022	10 Jan 2122

This amount doesn't mean your SIP amount. It is the maximum that can be debited across all your SIPs. In case you set up multiple SIPs, one mandate will take care of all periodical debits towards your SIPs.

**Your Next SIP cannot be paid without Authenticating your Mandate.
Authenticate your Mandate now to complete the process:**

Please click the link you will have received from BSE on your registered email ID **XXXXXXXXX21@gmail.com** to complete your Mandate registration.

 **ICICI Prudential Liquid Fund - Direct Plan - Growth**

Investment Amount	Investment Type	First SIP Payment	Next SIP Payment
₹99.00	Monthly SIP	10 Jan 2022	02 Mar 2022

Transaction Status



```
graph LR; A[Done: Order placed with Kotak Securities] --> B[Payment Received]; B --> C[Pending: Confirmation from AMC]; C --> D[Pending: Units allotted];
```

Order placed with Kotak Securities
10 Jan 2022 11:49 AM
Mode of Payment -
ICICI BANK LTD xxxxxxxx584
your SIP is placed within cut off

Confirmation from AMC
we are yet to receive confirmation from the AMC ideally it should be confirmed within 1-2 days

Units allotted:
It usually takes 1-2 business days for the units to be credited

[View your order status from the Order Report](#)

**We aim to enhance your experience from
time to time..**

**Thank you for your cooperation and
support.**

**Continue Investing in Mutual Funds with
us!**