Account No.

Account type

IFSC code (11 digit)

Savings

NRE

NRO

FCNR

MICR Code (9 digit)

Others

Specify



COMMON APPLICATION FORM

For first time investors for Lumpsum Investments / SIP Investments / Zero Balance folio registration.

(PLEASE READ THE INSTRUCTIONS BEFORE FILLING UP THE FORM. ALL SECTIONS TO BE COMPLETED IN FIGURE IN BLACK/BLUE COLOURED INK AND IN RLOCK LETTERS)

Sub-Distributor Distributor Internal Sub-Broker/ ARN ARN 44428 ARN Sol ID Application No. **Employee** RIA CODE^ **EUIN E051912** Code Serial No., Date & Time Stamp Upfront commission shall be paid directly by the investor to the AMFI registered distributor based on the investor's assessment of various factors including the service rendered by the distributor. ^ I/We, have invested in the scheme(s) of Axis Mutual Fund under Direct Plan. I/We hereby give my/our consent to share/provide the transactions data feed/portfolio holdings/NAV etc. in respect of my/our investments under Direct Plan of all schemes of Axis Mutual Fund, to the above mentioned SEBI Registered Investment Adviser "I/We hereby confirm that the EUIN box has been intentionally left blank by me/us as this transaction is executed without any interaction or advice by the employee/ manager/sales person of the above distributor/sub broker or notwithstanding the advice of in-appropriateness, if any, provided by the employee/relationship manager/sales person of the distributor/sub broker." Second Applicant Third Applicant Power of Attorney Holder You/ Sole Applicant /Guardian TRANSACTION CHARGES FOR APPLICATIONS THROUGH DISTRIBUTORS ONLY (Refer Instruction No. 20) I confirm that I am a first time investor across Mutual Funds. OR I confirm that I am an existing investor across Mutual Funds. In case the subscription amount is ₹ 10,000 or more and your Distributor has opted to receive Transaction Charges, the same are deductible as applicable from the purchase/subscription amount and payable to the Distributor. Units will be issued against the balance amount invested. EXISTING INVESTOR'S FOLIO NUMBER (If you have an existing folio with KYC validated, please mention here and skip to section 4) MODE OF HOLDING (in case of Demat Purchase Mode of Holding should be same as in Demat Accoun **Unit Holding Option** Demat Mode Physical Mode Single | Joint (Default) Folio number (in case of Demat, please fill sec 6) Anyone or Survivor 1. YOUR PERSONAL DETAILS (MANDATORY) (In case of investment "On behalf of minor", Please refer instruction No. 11) First Applicant Mr. Ms. M/s Gender Μ Aadhaar No. PAN (Mandatory) CKYC No. DOB Address City Pincode State Mobile Email ID Pvt. Sector Service **Public Sector Service** Govt. Service **Business** Professional Agriculturist Occupation Details Retired Forex Dealer Student Others Specify Housewife Below 1 Lac 1-5 Lacs 5-10 Lacs 10-25 Lacs 25 Lacs - 1 Crore > 1 Crore Gross Annual Income (₹) Net worth (Mandatory for Non - Individuals) ₹ D М Μ as on I / we hereby prefer to 'OPT-IN' to receive physical copies of scheme Annual Report or Abridged summary. BANK ACCOUNT DETAILS FOR PAYOUT (Please note that as per SEBI Regulations it is mandatory for investors to provide their bank account details. Refer Instruction No. 6) Name of the bank Branch Address City State Pincode

Second Appl	icant	Mr.	Ms.	M/s.	<u></u>					SE	CON	D A	PPLIC	AN1	-					- 1	Gende] M [F	
PAN (Mandatory)										Aadhaar (Optional)	No.														
DOB	D	D	М	М	Υ	Υ	Υ	Υ		CKYC No (Optional)	0.				1 4 d	gitCl	KYC	Nur	n b e	r					
Address																									
City									S	itate										Pinco	de				
Oggunation	انسانا			Pvt.	Sec	ctor Se	rvice		Public	Sector Se	rvice	G	Sovt. Se	vice		Busines	s	Pro	ofessio	onal		Agri	cultur	ist	
Occupation I	Jeidii	>		Ret	ired	l			Hous	sewife		F	orex De	aler		Student		O1	thers			Spe	ecify	/	
Gross Ai				Bel	ow	1 Lac		1	-5 Lac	s [5-10 Lo	acs		0-25	Lacs		25 Lc	acs -	1 Cro	ore	>	1 Cro	ore		
Third Applic	ant	Mr.	Ms.	M/s.						Т	HIRD	AP	PLICA	NT						(Gendei] M [F	0
PAN (Mandatory)										Aadhaar (Optional)	No.														
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Address																									
City									S	itate										Pinco	de				
Occupation I	Details			Pvt.	. Ser	ctor Se	ervice		Public	Sector Se	rvice		Govt. Se	rvice		Busines	ss	Pr	ofessi	onal		Agri	icultur	ist	
Оссоранон				Ret	tired	<u> </u>			Hous	sewife		F	orex De	aler		Student	[0	thers			Spe	ecify	/	
Gross Annual Below 1 Lac 1-5 Lacs 5-10 Lacs 10-25 Lacs 25 Lacs - 1 Crore > 1 Crore																									
GUARDIAN DETAILS (In case First / Sole Applicant is minor) / CONTACT PERSON - DESIGNATION / PoA HOLDER (In case of Non-individual Investors)																									
Mr. Ms. M/s										GUA	RDI	AN									Gendei] M [F	0
PAN (Mandatory)										Aadhaar (Optional)	No.														
DOB	D	D	М	М	Υ	Υ	Υ	Υ		CKYC No (Optional)	0.				1 4 d	gitCl	KYC	Nur	n b e	r					
Address																									
City									S	itate										Pinco	de				
Occupation I	Detail:	s		P	٠. S	Sector	Servi	ce	Pu	blic Sector		Gov	/t. Servi	се	E	Business		Р	rofess	sional		Agı	ricultu	ire	
				R	Retir	ed			Н	lousewife		Fore	ex Deal	er	s	itudent		_ c	Others	s		Spe	ecify	/	
Gross Ai				В	}elo	w 1 Lo	ас		I-5 Lac	cs	5-10 L	acs.		10-2	Lacs		25 L	acs -	1 Cr	ore	>	1 Cr	ore		
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Email ID																									
Proof of the	Proof of the Relationship with Minor Birth Certificate School Certificate Passport Others Specify																								
TAX STATUS (Applicable for First / Sole Applicant) Resident Individual FIIs NRI-NRO HUF Club / Society PIO Body Corporate																									
Minor	Go	overr	mer	nt Bo	dy [Tr	ust	N	IRI - NI	RE Ba	nk & F	I	Sole Pr	opriet	or	Partner	ship F	irm[QFI [Pro	vider	nt Fun	d	
Others					S	ресі	fy																		
	Fo	or In	divi	dual	s											(Comp									
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I am rela	ated to	o a P	olitic	ally E	хро	sed Pe	erson			Exchange /		•	•										Yes	-	No No
I am not related to Politically Exposed Person Money L								ending / P	_	-	Cusiii0	Jeivi	.es								Yes Yes	-	No No		

2. 1	FATCA AND CRS DET	AILS FOR INDIVIDU	JALS (Including So	le Proprietor. Re	efer Instructio	on No. 23)				
R RESIDENT	The below informat	ion is required for all (applicants/guardio	an.						
		Place / Ci	ty of Birth	Cour	ntry of Bir	rth	Co	ountry of Citizenship	/ Nationality	
Firs	t Applicant / Guardia	n					Indian	U.S. Others		_
Sec	ond Applicant						Indian	U.S. Others		
Thir	rd Applicant						Indian	U.S. Others		
ON RESIDE	If 'YES' please fill	sident (i.e., are you for ALL countries (oth a Citizen / Resident	er than India) in	which you	are a Resi	dent for	tax purpose	Yes N	40	
		Country of Tax Residency	Tax Identifica Functiona	tion Numb I Equivaler			fication Type er please specify)	Addre	ess Type	
First	Applicant / Guardian							Resi Rego	I. Office Busine	ess
Seco	ond Applicant							Resi Rego	I. Office Busine	ess
Thir	d Applicant							Resi Rego	I. Office Busine	ess
Ove	erseas Address									
							С	lity		
State	•		Co	untry				Zipcode		
3. 1	NOMINATION DETA	ILS (Mandatory) (Refer In	struction No. 18)							
Sr. No.	Nominee N	lame	PAN	Allocation (%)	Relations with Investo	-	Nominee date of birth	Guardian Name (in case of Min	Guardic	
1						D	D M M Y Y			
2						D	D M M Y Y			
3						D	D M M Y Y			
	I/We DO NOT wish	to nominate and sig	gn here	You/ Sole A	Applicant		Second Appli	cant	Third Applicant	
4. 1	INVESTMENT DETAIL	S (For multiple schemes	ref instruction no. 2	22) (Investors	applying un	nder Direct	· Plan must select "DIRE	CT" against scheme name	;, Refer Instruction No. 2	2.)
S N	r. o.	So	heme				Plan	Option	Amount	
	1						Direct Regul	ar		
2	2						Direct Regul	ar		
3	3						Direct Regul	ar		
To	tal			In won	-de				In figures	

5. PAY	MENT DETAILS			<u></u>								
No	Non-Third Party Payment Third Party Payment (Please attach 'Third Party Payment Declaration Form')											
Mode	Wode Cheque DD Axis Bank Debit Mandate Date D D M M Y Y Y Y Cheque / DD No.											
Amount (in figure:	Amount (in words)											
Pay-in A/	Pay-in A/c No.											
Account t	Account type Savings Current NRE NRO FCNR Others Specify											
IFSC code	FSC code (11 digit) MICR Code (9 digit)											
Drawn o	Drawn on bank / branch name & address											
6. DEN	6. DEMAT ACCOUNT DETAILS (OPTIONAL)											
(Please	ensure that the sequence of name	es as mentioned in the application form mo	tches with that of the A/c held with the dep	ository participant) Refer Instruction No. 19.								
NSDL:	Depository Participant Name		DP I	D: I N								
	Beneficiary A/c No.											
ana.	Depository Participant Name											
CDSL:	Beneficiary A/c No.											
Enclose	ed Client Master	Transaction / Statement Copy / DIS	Сору									
		_										
	LARATION AND SIGNATURE											
understoo source on Act, Anti A been indu "Know Yor Scheme, i the law.) T Mutual Fu policy whi my invest	In the terms, conditions, details, by and does not involve designed foney Laundering Laws, Anti Corned by any rebate or gifts, directur Customer" process is not compart favour of the applicant, at the active ARN holder has disclosed to ands amongst which the Scheme is available on the website of the ment related queries and/or reactives.	rules and regulations governing the schen for the purpose of the contravention of any ruption Laws or any other applicable laws etaly or indirectly in making this investment. I, oleted by me/us to the satisfaction of the Mupplicable NAV prevailing on the date of sucme/us all the commissions (trail commissions being recommended to me/us. I/we give he AMC / Fund. I/We give my consent to A.	ne. I/We hereby declare that the amount in Act, Rules, Regulations, Notifications or Denacted by the Government of India from time. We confirm that the funds invested in the staul Fund, (I/we hereby authorize the Mutuch redemption and undertake such other act on or any other mode), payable to him for the my our consent to collect personal data way. Our consent to collect personal data way.	pply for units of the scheme. I have read and wested in the scheme is through legitimate irectives of the provisions of the Income Tax me to time. I/we have not received nor have Scheme, legally belongs to me/us. In event al Fund, to redeem the funds invested in the ion with such funds that may be required by the different competing Schemes of various or information as prescribed in the privacy e, SMS, email or any other mode to address motions/ potential investments and other								
₹50,000 that I/We	n a year (Applicable for Micro inv	restment only.) with your fund house. For NR I through approved banking channels or fr	lls only - I / We confirm that I am/ we are No	result in aggregate investments exceeding n Residents of Indian nationality/origin and / Non Resident Ordinary / FCNR account.								
provided l				ns) and hereby confirm that the information CA & CRS Terms and Conditions below and								
usage (ii) 1 I/ We here	validating/authenticating and (ii) by provide my/our consent for s	updating my/our Aadhaar number(s) in a haring/disclosing of the Aadhaar number(ccordance with the Aadhaar Act, 2016 (and	le thereunder, for (i) collecting, storing and d regulations made thereunder) and PMLA. the asset management companies of SEBI by PAN.								
√												
You,	/ Sole Applicant /Guardian	Second Applicant	Third Applicant	Power of Attorney Holder								

Place

Date D D M

SIP Scheme 3



Stamp & Signature

	IP first tin																			forr	n.					Арр	lic	ati	on	No					$\Big]\Big($						
Dis ARI	tributo N	or ,	٩R	N 44	14	-28	3		Suk ARI		isti	ibu	ıotu	r								Internal Sub-Broker/ Sol ID																			
EUI	IN	E051912						Employee Code								RIA CODE^																									
rende trans	ered by	the d data f	istrib eed/	utor. ^ portfoli	1/\	We, I	directly by the investor to the AMFI registered e, have invested in the scheme(s) of Axis Mu oldings/ NAV etc. in respect of my/our investment EUIN box has been intentionally left blank by person of the above distributor/sub broker."								f Ăxi	is A	Λutu	ıal I	Func	d un	der I	Dire	ct P	lan	. I/W	/e h	ere	by (give	my/	our c	ons	ent t	o sł	nare	e/pro	ovide	th:	е		
	relation	nship '	mar	nager/s	ale:	s pe									óker																										
	You/ Sole Applicant /Guardian							Se	con	d Ap	plio	cant							Т	hirc	d Ap	plic	ant						Pow	er c	of Att	orn	ey H	lold	er						
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AXIS MUTUAL FUND RESPONSIBLE Mutual Par	md	Spo	nsor	UN Bank C		·					Ban	k us	se			Ba	ank	use	l	Utilit	ty Co	ode										D a Bank	use	D e	D	M	M	Υ	γ	γ γ	
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SIP Scheme	e 2																					To	p-u	ıρ	Г	Ye	s	Г	N	0											

Тор-ир

Yes

Νo

2. SIP DETAILS			SIP Registration I	Mode A-OTM	K-OTM Mandate along with SIP for								
OTM Reference No.					(if Multiple One Time Mandate are registere								
Scheme / Plan / Option	Frequency	SIP Date	Enrollment Period	CID A	TOP-UP Facility (Optional) Only available for Monthly SIP								
Scheme / Plan / Option	rrequency	(DD)	(MMYY)	SIP Amount	Frequency Amount								
	Monthly		From	₹ in figures	Half Yearly ₹ in figures								
	Yearly	Default SIP Date 7th	То		Yearly ————————————————————————————————————								
	_	SIF Date / In	or 1299	in words	in words Dynamic TOP-UP								
					D Half Vanda								
	Monthly		From	₹ in figures	Half Yearly ₹ in figures								
	Yearly	Default SIP Date 7th	То		Yearly — in words								
	_	Sir Dule /iii	or 1299	in words	Dynamic TOP-UP								
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	Monthly		From	₹ in figures	in figures in figures								
		Default SIP Date 7th	То	in words	Yearly — in words								
			or 1299		Dynamic TOP-UP								
IP initial payment details (Optio	nal)												
rawn on bank / branch name				Amou	unt								
Node Cheque/DD Che	ue/DD		Da	ited D D M M Y	YYY								
case of multiple SIP, mention "A:	ris MF Multiple Sch	hemes" on the	e payment instrument.										
3. Declaration and Signature	(to be signed b	ov all unit he	olders if mode of holdi	ng is 'ioint')									
We declare that the particulars fu yment of SIP installments and/or- ne to time. If the transaction is dela so inform Axis Mutual Fund about	rnished here are co any lumpsum payn yed or not effected any changes in my	orrect. I / We nents through at all for reaso y bank accou	authorize Axis Mutual Fund an Electronic Debit arrang ons of incomplete or incorr nt. I/We hereby authorize t	d acting through its service pi jement / NACH (National Aut ect information, I/We would n o honour such payments and	roviders to debit my / our bank account towa comated Clearing House) as per my request fr not hold the user institution responsible. I/We I have signed and endorsed the Mandate For								
You/ Sole Applicant /C		request) to ge	Second Applican		ges, if any, may be charged to my/our accour								
		INST	RUCTIONS FOR SII	P & TOP-UP									
Multiple SIP registration facility is no Fund, Gold ETF and during NFO.	ot available for Axis (Fund, Axis Liquid Ho		"transaction charges" is at the discretion of								

- Investors are required to submit Form along with a photo copy/cancelled cheque of Debit Bank Account at least 15 days before the first SIP Installment date.
- Investors shall have the option of choosing any date of the month as the SIP date except the dates 29th, 30th and 31st. If SIP date is not mentioned, default date would be considered as 7th of every month. If the SIP date falls on a non-business day or a bank holiday, the SIP debit will be processed on the following business day.
- 11. Please refer below table for minimum amount per installments:

Scheme	Minimum Amount (₹)	Minimum Installments
All Schemes except Axis Liquid Fund	1000	6
Axis Long Term Equity Fund*	500	6

Note: For all schemes, minimum amount is as per above table and thereafter in multiple of

For Long Term Equity Fund Minimum amount is as per above table and thereafter in multiple of $₹500^*$.

- If no amount is mentioned minimum scheme amount would be considered i.e. for Axis Long Term Equity Fund minimum amount would be ₹ 500/- and for other schemes minimum amount would be ₹ 1,000/-.
- For details about the Scheme and its facility please refer the SID, SAI & KIM of the respective schemes / Addendum issued from time to time carefully before investing.
- The SIP will be discontinued automatically if payment is not received for three successive installments.
- Investors can discontinue a SIP at any time by sending a written request to any Official Point of Acceptance or to the registrar Karvy. Notice of such discontinuance should be received at least 20 days prior to the due date of the next installment / debit.
- Mandate will be processed through NACH platform offered by NPCI
- As per SEBI circular dated August 22, 2011, Transaction Charge per subscription of ₹ 10,000/- and above shall be charged from the investors and shall be payable to the distributors/ brokers (who have not opted out of charging the transaction charge) in respect of applications routed through distributor/broker relating to Purchases / subscription / new inflows only (lumpsum and SIP), subject to the following:
 - For Existing / New investors: ₹100 / ₹150 as applicable per subscription of ₹10,000/–and above.
 - Transaction charge for SIP shall be applicable only if the total commitment through SIP amounts to ₹10,000/- and above. In such cases the transaction charge would be recovered in maximum 4 successful installments.
 - There shall be no transaction charge on subscription below ₹10,000/-
 - There shall be no transaction charges on direct investments.
 - There shall be no transaction charges for transaction other than purchases/subscriptions relating to new inflows such as Switches, etc.

 Transactions carried out through the Stock Exchange platforms for mutual funds shall
 - not be subject to transaction charges.

The requirement of minimum application amount shall not be applicable if the investment amount falls below the minimum requirement due to deduction of transaction charges from the subscription amount.

Investors may note that distributors can opt to receive transaction charges based on type

- Investors may note that distributors can opt to receive transaction charges based on type of the Scheme. Accordingly, the transaction charges would be deducted from the subscription amounts, as applicable.

 11. Investor will not hold Axis Mutual Fund, its registrars and other service providers responsible if the transaction is delayed or not effected or the investor bank account is debited in advance or after the specific SIP date due to various clearing cycles of NACH Debit/ Local/Bank holiday. Axis Mutual Fund, its registrars and other service providers shall not be held responsible or liable for damages / compensation / loss incurred by the investor as a result of using the SIP or ECS. As the debt facility. The investor assumes the investor as a result of using the SIP or ECS / Auto debt facility. The investor assumes the entire risk of using this facility and takes full responsibility.
- Investor can change bank details for SIP by submitting a "CHANGE OF BANK MANDATE FOR SIP" form available on the website or at any Investor Service Centre along with cancelled cheque of the new bank with the investor's name printed on it.
- TOP-UP Facility: Under this facility the Investor can increase the SIP installment at pre-defined intervals by a fixed amount or any time as per the request. This facility is available for individual investors only. For availing the said facilities, investors are required to note the following:
 - Investor willing to register TOP-UP should provide the TOP-UP details along with the SIP enrolment details
 - The minimum amount for Axis TOP-UP facility is ₹500/- and in multiples of ₹1/- for all schemes; except Axis Long Term Equity Fund the minimum amount is ₹500 and in multiples of ₹500 thereafter.
 - If no amount is mentioned as TOP-UP amount under frequency yearly and half-yearly, minimum TOP-UP amount would be considered, i.e., ₹500/- for all schemes.
 - TOP-UP frequencies available are Half-Yearly/ Yearly/ Dynamic requested intervals.
 - In case TOP-UP frequency is not indicated, it will be considered as Yearly by Default.
 - The date for Axis Mutual Fund TOP-UP Facility will correspond to the registered SIP.
 - TOP-UP will continue till the End of the SIP tenure by default.
 - In case an investor wishes to change the Top-Up amount, he/she has to provide a cancellation for the existing SIP and register fresh SIP.
 - Only TOP-UP cannot be discontinued anywhere during the SIP tenure.
 - In case of Dynamic Top up option, any changes in the amount can be made only after completion of 6 months from the date of the first installment and minimum gap between two top up requests should be 3 months and amount specified in last request shall be continued till the End of the SIP tenure.
- Please see the illustration below to know how to calculate SIP Top-Up amount:
 SIP Starts on 07/May/2016 · SIP ends on 07/12/2099 · SIP amount is ₹1000

iop-up amount is t	200 - lob-ob rredne	ncy is mair-yeariy	
Top-Up date	SIP Amount	Top-Up	New SIP
	(₹)	Amount (₹)	Amount (₹)
7-Nov-2016	1000	500	1500
7-May-2017	1500	500	2000
7-Nov-2017	2000	500	2500
7-May-2018	2500	500	3000