

A) STEP BY STEP GUIDE FOR ACCOUNT OPENING

OFFLINE ACCOUNT OPENING STEPS:

Welcome to OSWAL SHARES & SECURITIES LTD., your trusted partner for seamless Demat and Trading account openings. We understand that initiating your trading journey is a significant step. Here's a detailed step-by-step guide for offline account opening with us:

Step 1:

Gather Essential Documents Collect vital documents, including your PAN card, proof of address, proof of income (if applicable), bank account details, recent passport-size photographs, and trading preference details.

Step 2:

Obtain Account Opening Forms Download the account opening forms from our official website or pick them up directly from our head office.

Step 3:

Fill in Account Opening Forms Thoroughly fill out the account opening forms, providing accurate information. Specify your trading preferences for specific market segments.

Step 4:

Select Trading Preferences Indicate your trading preferences by selecting the desired market segments (e.g., equities, derivatives, commodities). If you choose not to trade in a particular segment, kindly mark accordingly and sign.

Step 5:

Nomination Process Ensure the security of your investments by completing the nomination process. This step safeguards your holdings for the future.

Step 6:

Sign the Forms Review the forms, sign where required, and acknowledge your agreement with our terms and conditions.

Step 7:

Attach Necessary Documents Attach photocopies of the necessary documents, including proof of identity, address, income, bank account details, PAN card, and photographs.

Step 8:

Visit Our Head Office Pay a visit to our head office to submit the completed forms and documents for verification.

Step 9:

Undergo Personal Verification Undergo a personal verification process, which may involve a face-to-face meeting or video verification. This step ensures the validity of your identity and information.

Step 10:

Application Processing Once successfully verified, we'll process your application for both the Demat and Trading accounts.

Step 11:

Receive Your Account Numbers Upon successful processing, you will be issued your unique Trading account number or customer ID. This identifier is crucial for your trading activities.

Step 12:

Obtain DP Debit and Pledge Instruction You'll receive the Debit and Pledge Instruction (DPDI) form. This instruction, though voluntary, empowers you to perform on-market sale, pledge, and tender offers using your holdings.

Step 13:

Begin Your Trading Journey Congratulations! With your Demat and Trading accounts established, you're now poised to begin your trading journey with OSWAL SHARES & SECURITIES LTD.. Explore an extensive array of trading opportunities in the capital markets.

At OSWAL SHARES & SECURITIES LTD., your financial prosperity and security are our prime concerns. Our comprehensive guide ensures every aspect of offline Demat and Trading account opening is covered. Your satisfaction remains our priority.

ONLINE ACCOUNT OPENING STEPS:

We do not have online account opening facility.