

Application No.

Please read the instructions carefully, before filling up the application

1. FOR OFFICE USE ONLY

Date and Time of Receipt	Bank / Register Serial No.

ARN-4464

E032737

VIKRAM S. BAGADTHEY

The Trustee, Axis Mutual Fund,

I/We have read and understood the contents of the offer document & the instructions for the Trigger Plan. I / We hereby apply for the same and agree to abide by the terms, conditions rules & regulations of the plan.

2. EXISTING UNIT HOLDER INFORMATION

FOLIO NO

Name of scheme

Purchase date Purchase amount

(Any Transaction date & its respective transaction amount as per the customer's choice)

3. APPLICANT INFORMATION

Name of First / Sole applicant [Are you KYC Compliant Please (✓) Yes ☐ or No ☐] PAN No.

Name of Guardian (In case of Minor) [Are you KYC Compliant Please (✓) Yes ☐ or No ☐] PAN No.

Name of Second Applicant [Are you KYC Compliant Please (✓) Yes ☐ or No ☐] PAN No.

Name of Third Applicant [Are you KYC Compliant Please (✓) Yes ☐ or No ☐] PAN No.

4. OPTION - A

OPTION - B

Please tick any one of the following situation which will activate the trigger

- ☐ Yield of 10 year Gilt is at or below _____%
- ☐ NAV is at or above ₹ _____
- ☐ NAV appreciates by _____%

Please tick any one of the following

- ☐ Switch out to (Scheme, Plan & option) _____
- ☐ Redemption

Please tick any one of the following actions to be initiated on encountering the above situation

- ☐ Full ☐ To the extent of capital appreciation ☐ To the extent of principal amount

**Sole / 1st applicant / Guardian
Authorised Signatory**

**2nd applicant /
Authorised Signatory**

**3rd applicant
Authorised Signatory**

INSTRUCTIONS FOR TRIGGER

- Please use separate forms for each transaction under each folio.
- Unit holders are requested to tick only one trigger situation/ action mentioned under sec A & B above per transaction. In the event of multiple triggers for a particular transaction, the trigger request will be deemed to be cancelled.
- Trigger is an additional facility provided to the unit holders to save the time for completing the redemption/ switch formalities on happening of a particular event. Trigger is not to be conceived as an assurance on part of Axis Mutual Fund that the investor will manage to received a particular sum of money/ appreciation/ and/ or fixed % of sum.
- This form duly completed must be submitted at the nearest Designated Investor Service Centre.
- Please contact the nearest Investor Service Centre or write to the Registrar, Unit: Axis Mutual Fund, Karvy Computershare Pvt. Ltd., Karvy Registry House, #8-2-596, Avenue 4, Street No 1, Banjara Hills, Hyderabad - 500034, India or send an email to customerservice@axisamc.com, in case of non-receipt of account statement within 30 days from the date of submission of the application.

NOTE

- The Yields level specified by the unit holder must be in multiples of 0.05 percent, eg. 8.50%, 8.45%, 8.40% etc.
- The NAV INR level specified by the unit holder must be in multiples of 5 paise e.g. INR 10.50, INR.10.55, INR. 10.60, etc.
- The NAV percentage level specified by the unit holder must be in multiples of 1%.
- Day closing G-Sec Yield available on Bloomberg would be considered.
- NAVs of the schemes are declared at the close of the business day and hence Value of the unit holder's unit holdings based on the end of day NAV will be considered as a base for activating the triggers. Accordingly all the redemptions/ switches etc will be done on the same day closing NAV on which event occurs and process on next day.
- A trigger once activated will not be reactivated in any other plan/ scheme where the Switch happens or in the same plan which retains a part of value or in case of normal redemption/ switch before the trigger is activated. Triggers will be deactivated on redemption and/ or switch and/ or pledge of units.
- Trigger facility shall be applicable subject to payment of exit load, if any. Please note that one you cannot modify cancel a Trigger once registered. However, a fresh request can be made by submitting a fresh form which will lead to cancellation of earlier trigger and registration of new trigger.
- The specified trigger will fail, if the investor(s) do not maintain sufficient balance in the scheme (specific transaction) at the time of registration and on the trigger date.
- Trigger will not get executed in case units are pledged/ lien or on receipt of request for transmission.