

Process to open a Broking Account with

DEALMONEY TOUCH

MOBILE TRADING APP

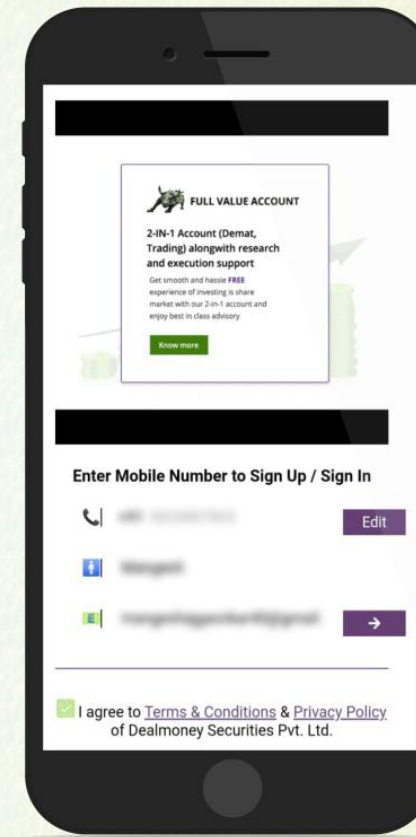
GET READY WITH DOCUMENTS NEEDED FOR ACCOUNT OPENING PROCESS

Important note: Make sure you have Net Banking Account ready Bank account in which you wish to send and receive the money from (the broker) us).

- | | |
|--|--|
| <ul style="list-style-type: none">✓ Cancelled cheque/
Front page of bank pass book/
Bank Statement and
Address proof.✓ PAN Card | <ul style="list-style-type: none">✓ Aadhaar card in PDF format or
Masked Aadhaar/ Passport/Voter ID
/Driving License/✓ Landline Bill/ Gas Bill/ Electricity Bill/
Ration Card/ Lease or sale.
Photo of your Specimen Signature. |
|--|--|

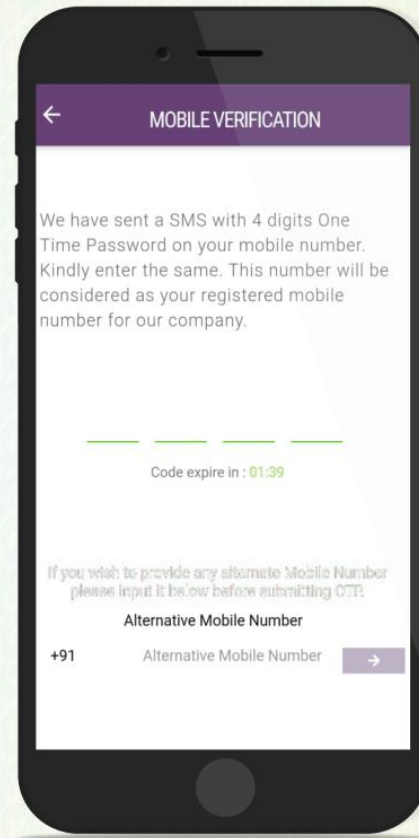
Sign Up with below details

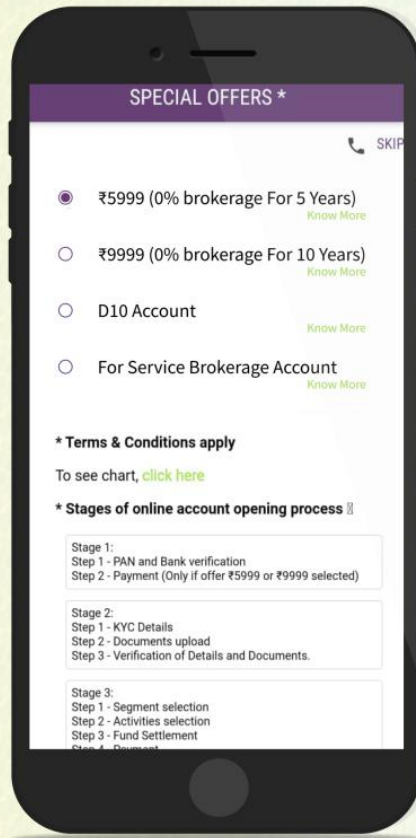
- ✓ Mobile Number
- ✓ Name
- ✓ Email Id and
- ✓ Click on “I Agree” to proceed further.



Mobile Verification

Then verify the OTP that
you will receive.





Brokerage Plan

- ✓ After verifying the OTP, Select the plan as per your wish
- ✓ This is an optional step. If you just want to explore the app then you can click on the “SKIP” button on the top right hand corner and go to the STAGE1 of the Account Opening Process.

STAGE 1: PAN and Bank Details Submission

- ✓ Enter and submit you PAN details,
Bank Details and your personal details
- ✓ Click continue

PAN & BANK DETAILS

Stage 1 - Step 1 SKIP

10% profile completed

Know Your Client (KYC) is a process which is used by all regulated financial entities to verify the clients as per Indian Securities Regulations. You will now need to have your PAN & Bank details ready to commence this step.

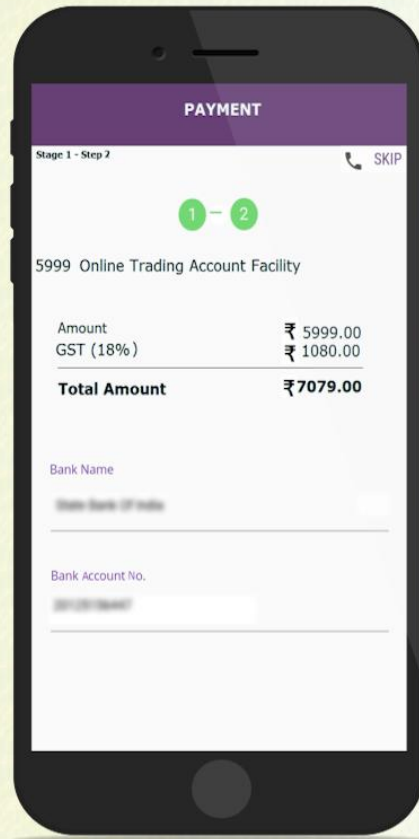
PAN No. (Required for regulatory purpose) *

Date Of Birth (Required for KYC Registration Verification) *

Name

Reference

Reference Internet

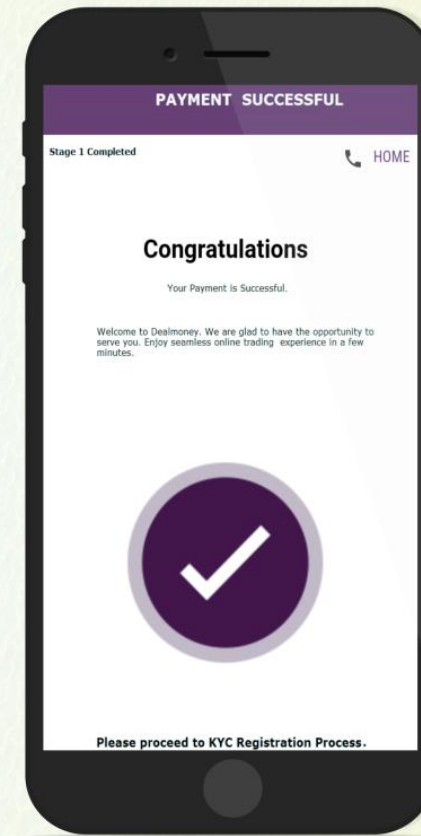


Payment of One Time Registration Fees

- ✓ Secure your brokerage plan (if you choose the Rs 5999/ Rs 9999 plan, you can complete the payment procedure as per your Pre - Selected brokerage Plan).
- ✓ if you have selected a particular scheme to go with payment option will occur.

Payment Successful

After completing your payment you will receive a confirmation.
Click continue to proceed further.





Congratulations

you have completed **Stage 1** of the
account opening process



STAGE 2: Registration Process

- ✓ KYC registration Process
- ✓ If Pan card is KRA verified then your personal details gets auto filled
- ✓ If not, Fill in the details, Verify and Click Continue

KYC REGISTRATION PROCESS

What is KYC Registration Process?

KYC or "Know Your Client" is primary requirement for opening your trading-cum-demat account with a broker. [Know More](#)

* Below fields are required for regulatory purpose.

* Please keep you PAN Card, Cancelled Cheque or Front Page of Bank/Pass Book or Bank Statement, Aadhaar Card and any other Address Proof ready for uploading.

Subscriber Name

PAN Card Number

Gender

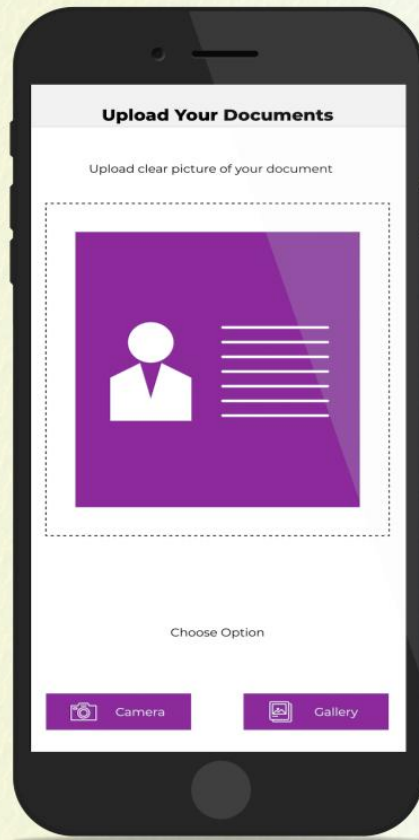
☒ Male ☐ Female ☐ Other

Marital Status

☐ Single ☒ Married

Are You Politically Exposed Person (PEP)

☐ PEP ☐ Related to PEP ☒ NA

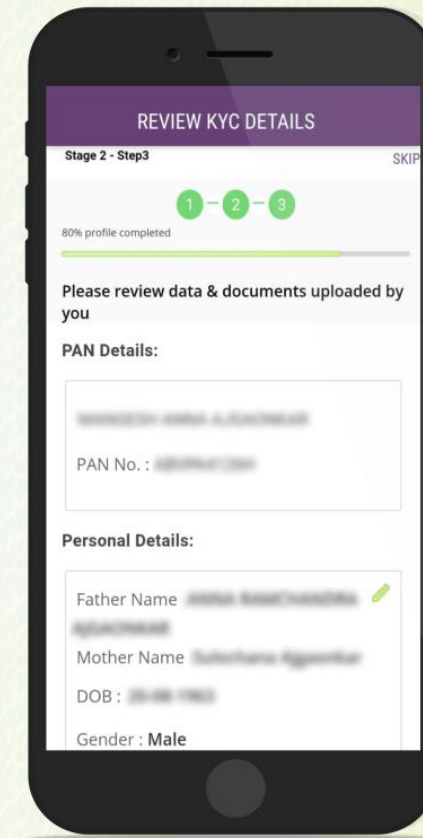


Document upload Process

- ✓ A clear picture of yourself
- ✓ Pan card, Canceled Cheque
- ✓ Your specimen Signature etc.
- ✓ Click submit after uploading the documents

Reviewing KYC Details

- ✓ Verify your details after KYC process
- ✓ Edit and update details if needed, Once done
- ✓ Click Reconfirmation and Accept





Congratulations

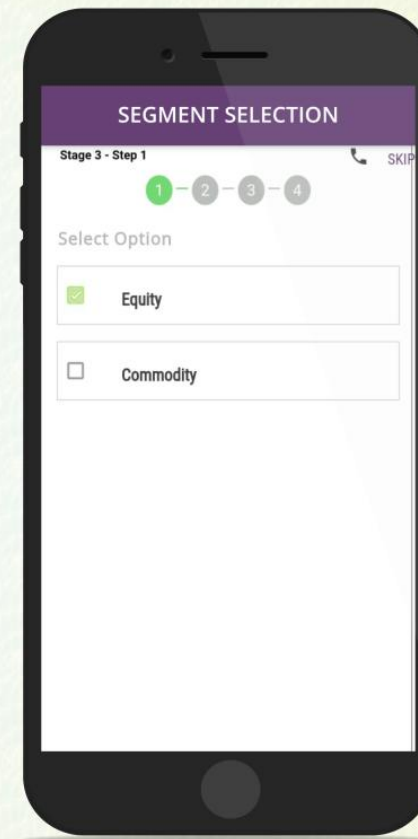
you have completed **Stage 2** of the
account opening process

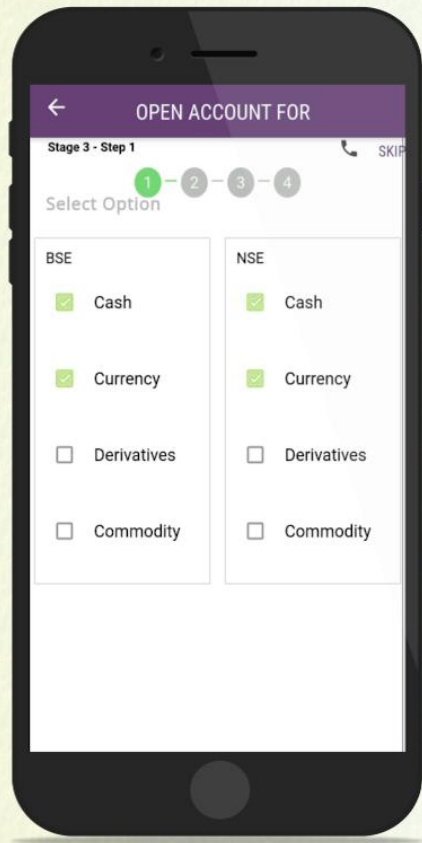


STAGE 3: Segment Selection

Select your Segment you
want to trade in:

- ✓ Equity
- ✓ Commodity
- ✓ Or both



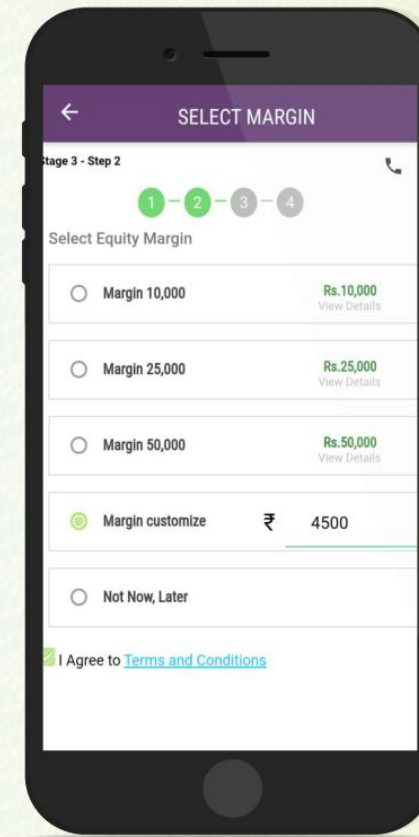


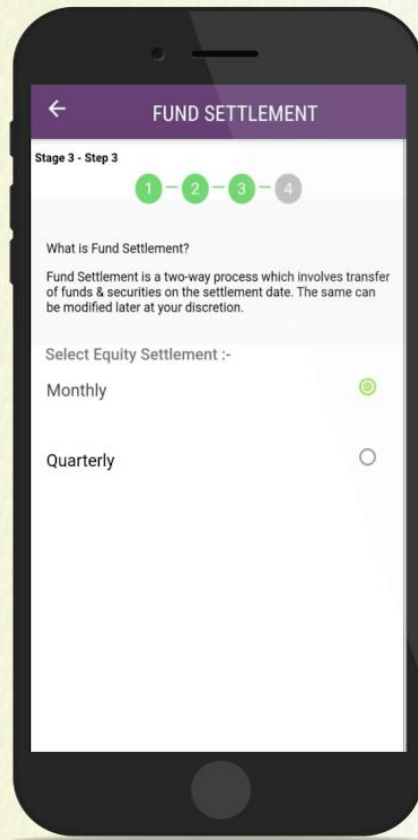
Sub-Segment Selection

After selecting the segment you need to choose sub segment you wish to and click Continue.

Margin Selection

- ✓ Customize your margin amount
- ✓ Click “I Agree to terms and Conditions”
- ✓ Click Continue



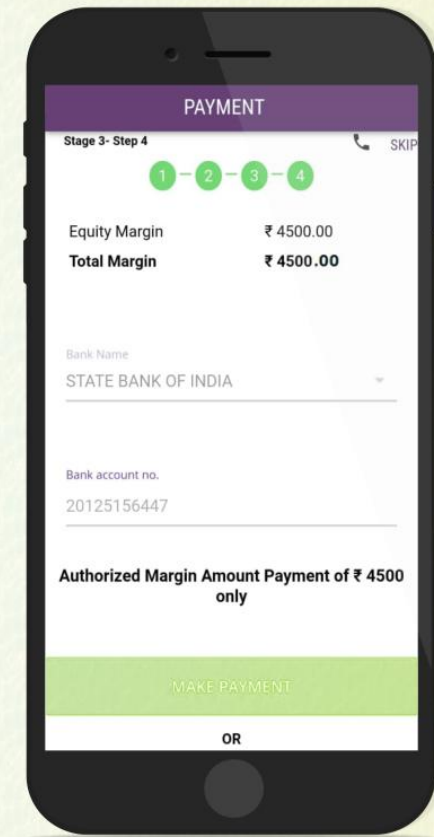


Fund Settlement

- ✓ Select your settlement option
(can be modified at anytime)
- ✓ Click continue for next step

Adding Money to Margin account

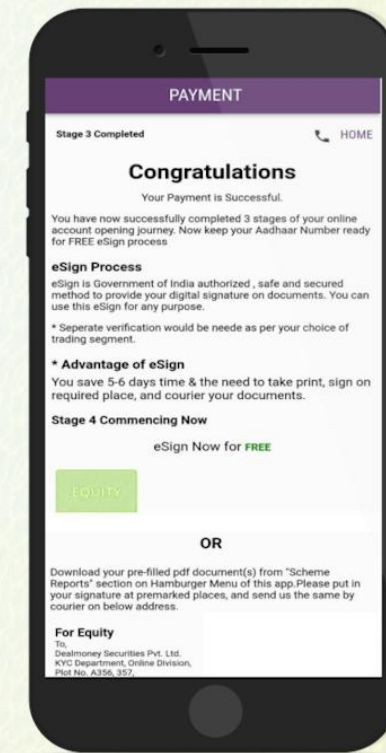
- ✓ Select Payment Mode (Online or Offline)
- ✓ For Online Payment - Enter Your Bank details and proceed by clicking Make Payment
- ✓ For Offline payment - Upload an image of the cheque of particular amount and Click submit to proceed



You will receive a confirmation after complete the payment process.
Along with it you receive a PDF document which would require your signature.

Two options to get it done:

- ✓ E-sign it with your digital signature if you have one (If don't have one you click the link for free E-sign by NSDL)
- ✓ For Manually Sign process Download the Document, Print and Sign it and Send the documents to the below address:





Congratulations

you have completed **Stage 3** of the
account opening process



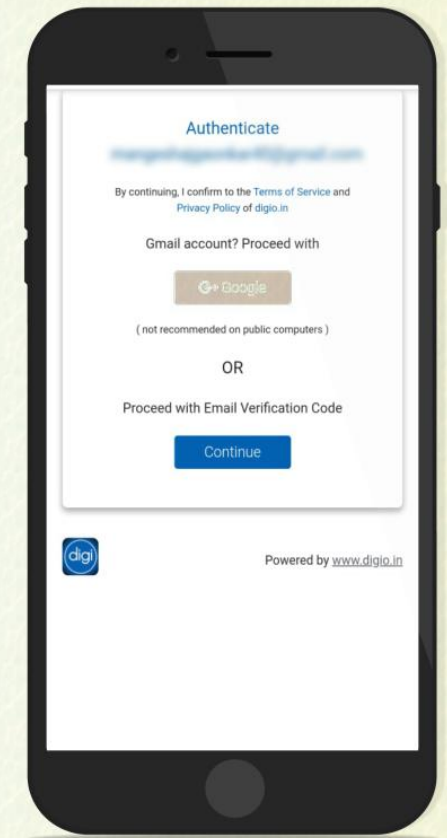
STAGE 4 (PART A)

Digital Authentication

NSDL is a government Authorized e-signature provider. Once you click on the FREE eSign link you will be redirected to NSDL.

NSDL eSign In Process :

- ✓ Verify your profile and enter your aadhaar
- ✓ card number and click to get OTP
- ✓ Enter OTP and click on "Verify OTP"
- ✓ Once OTP verified your eSign will be complete



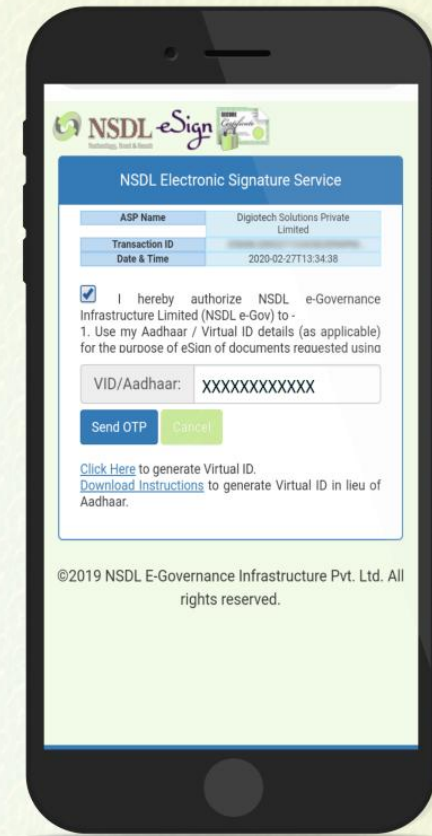
STAGE 4 (PART B)

In Person Verification (IPV)

After free Esign process by NSDL is to complete the IPV (In Person Verification) process. This process compulsory For every client as per the SEBI circular. Choose the process between physical or online IPV.

For Online Process of IPV:

- ✓ You will receive a link on registered Mobile number
- ✓ A unique ID and Password will be generate through the link for private process of IPV
- ✓ Keep your Identification handy to share with your executive handling your IPV process
- ✓ You will receive a confirmation call from Executive informing about completing the process.





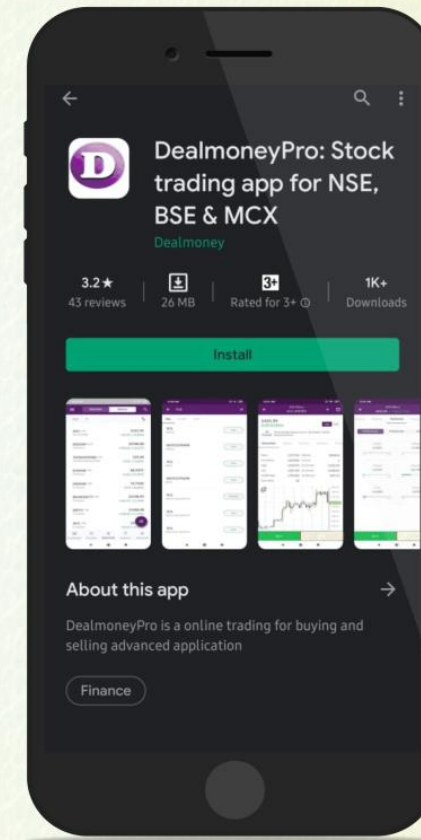
Congratulations

you have completed **Stage 4** of the
account opening process



Download and Activate Dealmoney pro app

- ✓ Download DEALMONEY Pro app from Google play Store and Apple Store for free
- ✓ Will receive client code after KYC team verifies and authenticates your details
- ✓ For any glitch or faulty documents KYC team will contact you



Ready To trade

Congratulation Your account opening
process is now complete

THANK YOU FOR WATCHING

DOWNLOAD THE DEALMONEY PRO APP NOW

 Available on the
App Store



 GET IT ON
Google Play



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