Application Form for Corporate Scheme Preference Change

Page 1

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	Class	(Can not exceed 50%		Max up 100%)		ا Max) 100	•		(Can : xceed		(100%	`			•		0%. 1)%, tł									

Asset	Е	С	G	Α	Total	Note: 1.The total allocation across E, C, G and A asset classes
Class	(Can not	(Max up to	(Max up to	(Can not	(100%)	must be equal to 100%. In case, the allocation is left blank and/or
Ciuss	exceed 50%)	100%)	100%)	exceed 5%)	(10070)	does not equal 100%, the application shall be rejected. 2.Asset
						class E-Equity and related instruments; Asset class C-Corporate
						debt and related instruments; Asset class G-Government Bonds and
Specify %						related instruments; Asset Class A-Alternative Investment Funds
						including instruments like CMBS, MBS, REITS, AIFs, Invlts etc

(iv	Auto Choice Option	(to be filled u	ıp only	in case	you have selected the	'Auto Choice	' investment o	ption. In case,	you do not indicat	e a choice of LC,
	your funds will be in	vested as per	· LC 50).)						

Life Cycle (LC)Funds	Please Tick (√) Only One	
LC75		Note: 1. LC 75- It is the Life cycle fund where the Cap to Equity investments is 75% of the total asset 2. LC 50- It is the Life cycle fund where the Cap to Equity investments is 50% of the total asset
LC50		3. LC 25- It is the Life cycle fund where the Cap to Equity investments is 25% of the total asset
LC25		

	G:	
		ture of Authorized Signatory
	Name :	Place :
	Designation :	
Corporate Head Office Seal	Department :	D D M M Y Y
	Signa	ture of Authorized Signatory
		ture of Authorized Signatory Place:
	Name :	Place :
	Name : Designation :	Place : Date :
DP Registration No.	Name :	Place : Date :
POP Seal	Name : Designation :	Place : Date :
POP Seal To be Filled by POP] eceived by:	Name : Designation : Department :	Place : Date :

Note:

- 1. Corporate has to select one PFM out of the latest list of PFMs who would invest the fund as per selected investment choice.
- 2. Examples of 'E', 'C', 'G' & 'A' mix are as follows:-

E (Equity)	C (Fixed Income)	G (Government Securities)	A(Alternative Investment Funds)
50% (max)	25%	20%	5%
50% (max)	20%	25%	5%
0%	50%	50%	0%
0%	100%	0%	0%
0%	0%	100%	0%
30%	25%	40%	5%
20%	50%	30%	0%

 $\label{locument} \textbf{Document to be Submitted to POP: Documents as a proof for KYC on the status of corporate/entity.}$