Application Form for Corporate Scheme Preference Change

Page 1

	Protean eGov Technologies Limited (formerly NSDLe-Governance Infrastructure Limited)																						
	(1	Please fil	l all the	e deta	ils in (CAPIT	ΓAL L	ETTE	ERS &	in BL	ACK	INK o	nly. Al	l Fields	mark w	ith * are	mand	atory.	.)				
	Corporat	e Regist	ration	Nun	iber:			Г				Т											
	o or porta			- (4.1.				L															
Sir / Ma	adam,																						
We her	eby submit a	request f	or Scho	eme l	Prefere	nce C	hange	. The	necess	sary de	etails	are pro	vided	below:									
1. Na	me of the Co	rporate*:	: 				1																_
2. Pho	2. Phone No. *: Mobile No.																						
	ST D Code Phone Number																						
3. De	3. Details of Scheme Preference*: Selection of Scheme preference by: Subscriber Corporate																						
4. If cl	hoice of invest	tment is to	o be ma	de by	the Co	orpora	ite on b	ehalf o	of the	emplo	vees (s	selected	as Coi	porate i	n clause	no. 3) the	en the i	followi	ing fie	elds a	ere mar	ndatory:	
						•				x ^•	(-			•		,			<i>U</i>			- 7	
<u>(i).</u>	*Name of t							netica	lorde	r													
							прпа	- Luca	Toruc							_							
	PFM Nam	-			-							Pleas	e Tick	(√) onl	y one								
	Aditya Birl	a Sun Li	fe Pens	sion l	Manag	emen	t Limi	ted				<u> </u>			<u> </u>								
	Axis Pensi	on Fund	Manag	emer	nt Limi	ted									<u> </u>								
	DSP Pensio	on Fund	Manag	ers P	rivatel	Ltd.									<u> </u>								
	HDFC Pen	sion Fun	d Man	agen	ent Li	nited																	
	ICICI Prud	ential Pe	ension I	Funds	s Mana	igeme	ent Co	npany	Limi	ted													
	Kotak Mal	indraPe	nsion I	und	Limite	d																	
	LIC Pensio	n Fund I	Limited	i																			
	SBI Pensio	n Funds	Private	e Lim	ited																		
	TATAPen	sion Ma	nageme	ent Pı	rivate I	imite	ed																
	UT I Pensio	on Fund I	Limited	1																			
	(Selection o rejected).	f PFM is	manda	atory	both ii	n Acti	ive and	Auto	Choi	ce. In	case y	you do	not inc	licate a	choice o	fPFM,	your a	pplica	ition f	form	shall t	oe sumi	marily
	,						_	_															
<u>(ii)</u>	(ii). Investment Option (Please Tick ($$) in the box given below showing your investment option):																						
	Active Cho	ice	Auto	Choi	ce																		
	ase note: In case you:	select A	rtive C	hoice	ı fill ur	secti	ion (iii) belo	wand	if you	ı sələr	et Auto	Choic	e fill ur	section	(iv) bel	ΟW						
2.	In case you	do not in	dicate	any i	nvestn	nent o	ption,	your f	fund w	ill be	inves	ted in A	Auto C	hoice(LC 50).								
3.																							
4.	In case sche								, then	the C	orpoi	rate sho	ould ac	cording	ly advise	its Sub	scriber	s to p	rovic	de the	eneces	ssary	
	information	while fil	lling up	the	Subscr	iber R	Registr	ation	Form.									-					
<u>(iii</u>). Asset Allo	cation (t	o be fil	lled u	p only	in ca	ase yo	u hav	e selec	ted th	ıe 'A	ctive C	hoice'	invest	nent op	tion.):							
	Asset	I	Ε		С		(j		A		Tota	1 N	Note: 1	The tota	l alloca	tion ac	ross E	E, C, C	Gan	d A a	sset c	lasses
		,				to		-	,				_ n	nust be	equal to	100%.	In case	e, the a	alloca	ation	is left	blank	and/or
	C2103 0	exceed	150%)		100%)		100	%)	exc	ceed 5	5%)	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	U										
	C : C - c:												d	ebt and	related	instrum	ents; A	Asset c	class (G-Go	vernn	nent Bo	onds and
<u>,</u>	(iii). Asset Allocation (to be filled up only in case you have selected the Asset Can not (Max up to (Max up to (Can not exceed 50%)) 100%) 100%) case you have selected the							ot	Total (100%) Note: 1.The total allocation across E, C, Gand A a must be equal to 100%. In case, the allocation is left does not equal 100%, the application shall be rejclass E-Equity and related instruments; Asset class						blank a ected. 2 C-Cor	and/or 2.Asset porate							
Specify % debt and related instruments; Asset class G-Govern related instruments; Asset Class A-Alternative Inve																							

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

(iv)	Auto Choice O	ption (to be filled u	p only	vin case	you have se	lected the	'Auto	Choice'	'investmen	t opti	ion. In c	case, y	ou do not	t i ndicate	a choice	e of LC,
	vour funds will	be inv	vested as per	LC 5	0.)	-											

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		

	Signat	ure of Authorized Signatory
	Name :	Place :
	Designation :	
Corporate Head Office Seal	Department:	D D M M Y Y
be Filled by POP P Registration No.		
	Signat	ure of Authorized Signatory
	Signat Name:	
P Registration No.	-	Place :
	Name:	Place :
P Registration No.	Name : Designation :	Place :
P Registration No. POP Seal	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%

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