



KBOLT-GO

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A FLAGSHIP PRODUCT

*On-the-go Mutual Funds service app with ease of digital transactions,
rapid submission of documents at POS and easy access to SOAs*



KBOLT-GO – AMC App - Features

■ Initiate Transaction for Investor

- New Purchase for KYC compliant investors
- Additional Purchase
- Redemption and Switch
- SIP, STP, SWP
- Digital/Phygital Mode
- Pause/Cancel Systematic
- NCT
- eNACH

■ eKYC

- Fetch Investor Portfolio details
- Client Search by PAN, Mobile & Folio No.

■ Payment Modes

- Net-banking
- UPI
- KOTM

■ Quick login

- PIN and Pattern

■ Statements and Reports

- SOA

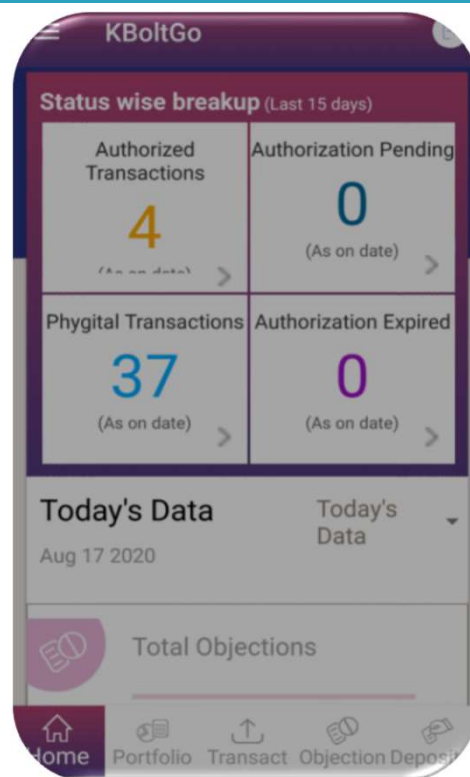
■ Mail back request

Login and Registration

The image displays two mobile application screens for K-Bolt Go. The left screen is the login interface, featuring the K-Bolt Go logo at the top. It includes input fields for 'User ID' and 'Password', a 'Remember Me' checkbox, a 'Forgot Password' link, and a 'Sign In' button. The right screen is the PIN/Pattern setup interface, showing tabs for 'PIN' and 'PATTERN'. It prompts the user to 'Set Your 4 Digit PIN to access KBoltGo Instantly' and provides a numeric keypad to 'Enter New MPIN'. A 'Skip PIN/Pattern setup' button is located at the bottom of the right screen.

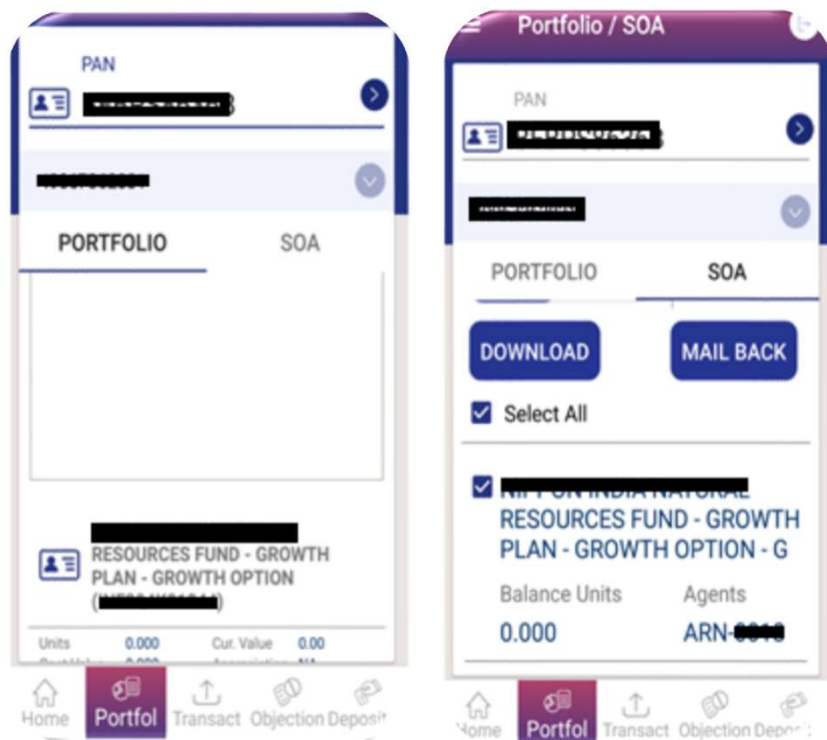
- Relationship Manager or sales team can login with existing KBOLT credentials.
- To login conveniently PIN/Pattern option provided.

Home Page – Post login



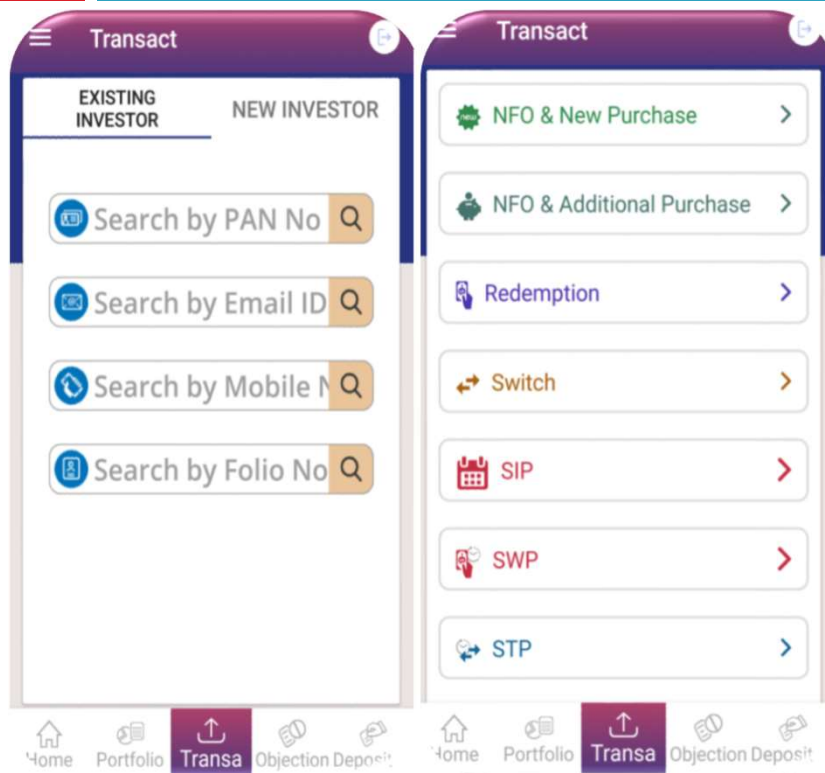
- Landing Page has Transaction Status wise break up for Digital mode transactions
 - Authorized
 - Investor Approved the trade.
 - Authorized Pending
 - RM Initiated and Investor Not approved it.
 - Authorized Expired
 - Payment link expired (Link will be active 24 hrs from the date of initiation)
- Phygital
 - Scan & Upload

Port Folio

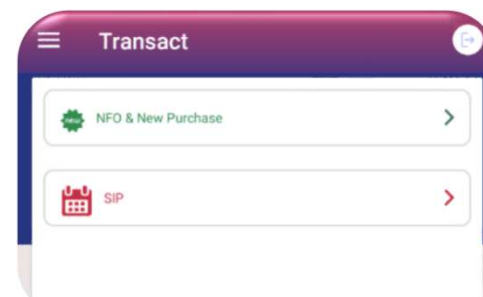


- RM can check the Portfolio or SOA of Investor
- SOA Mail back or Download options provided.

Transactions



- RM can initiate transactions for New investors or Existing Investors.
- 4 search criteria provided to search the existing investor.
- Based on search results RM shall select the Investor.
- Select the Transaction Type
- First time to the fund and KYC registered clients RM can able to initiate NFO & New Purchase and SIP transaction types.



e-KYC

- Non KYC complaint investors eKYC (full KYC) can be completed using eAADHAR or AADHAR XML
- Select the mode of Registration Digital
- eKYC Registration by Online IPV eSign & eKYC.
- Enter the Name Email and Mobile of the investor to proceed with the eKYC

Note: Follow Instructions while initiating the eKYC registration.

Transactions – Digital Mode

The screenshots illustrate the 'New Purchase' process in Digital Mode:

- Screenshot 1: Transact** - Shows the 'Select Transaction Mode' screen with 'Digital Mode' selected and a 'Submit' button.
- Screenshot 2: New Purchase** - Shows the initial form with fields for Investor Name, Email ID, Mobile Number, Fund, Category (EQUITY), and Invest Through (Regular selected).
- Screenshot 3: New Purchase** - Shows the continuation of the form with fields for Scheme, ARN Code, Sub ARN Code, Sub Broker Code, EUIN Declaration (No selected), EUIN No, and Minimum Amount (100 ₹).
- Screenshot 4: New Purchase** - Shows the final form with fields for ARN, Sub ARN Code, Sub Broker Code, EUIN Declaration (No selected), EUIN No, and Minimum Amount (5000 ₹), with a 'Submit' button.

- RM can initiate
- Direct or Regular mode transactions.
- For all subscriptions Investor will get a link to complete the payment

SMS & Email Trigger to Investor

Request you to review and take necessary authorization action to complete the transaction by clicking the 'Proceed' link at the below. Please note that the link would be active for 24 hours, post which please reach out to your RM-KBOLTGO TEST for reinitiating the transaction.

Following are the details of the initiated transaction:-

Transaction Reference Number	[REDACTED]
Transaction Initiated On	17/08/2020 07:58:00 PM
Distributor Name	[REDACTED]
ARN Code	ARN-0018
EUIN Code	E029426
Investor Name	[REDACTED]
Folio Number	Yet to be allotted
Transaction Type	New Purchase
Scheme/Plan/Option	[REDACTED]
Amount	Rs. 5000.00 /-
Investor Contact Details	[REDACTED]

- Investor will receive with Authorization Link Click to Proceed

Request you to review the proposed transaction details before authorising the same. Click on Proceed button below to view complete transaction details and for payment/authorization of transaction.

Proceed

Investor Authorization

Transaction Type	New Purchase	Account Number	E029426	Annual Income	1-5 Lacs
Primary Holder Name	[Redacted]	EUIIN Declaration	No	Source Of Wealth	Salary
	Edit	Amount	5,000.00 (Five Thousand Rupees)	Politically Exposed Person?	☐ Yes ☒ No
Investor Status	Select Investor Type Resident Indian NRI	FATCA Details		Are you tax resident of any country other than India?	☐ Yes ☒ No
Mode Of Holding		Gross Annual Income	1-5 Lacs	Bank Details	
Folio No	Yet to be allotted	Source Of Wealth	Salary	Bank	Select Bank Details
Primary Holder PAN	[Redacted]	Politically Exposed Person?	☐ Yes ☒ No	☐ Add Nominee - Nominee Details	
Scheme	DIVIDEND PAYOUT	Are you tax resident of any country other than India?	☐ Yes ☒ No	Paymode	Select Paymode Net Banking UPI
ARN Code	ARN-0018	Bank Details		Uploaded Cancelled Cheque	(Upload Cancelled Cheque in jpg / png / TIFF format Only) (Optional)
SUB ARN Code		Bank	Select Bank Details		
SUB Broker Code		☐ Add Nominee - Nominee Details			
EUIIN Number	E029426				
EUIIN Declaration	No				

[Confirm](#)

- Investor can complete the payment using
 - Net banking
 - UPI
 - KOTM

SIP Transactions

SIP	SIP	SIP	SIP
SIP Type Select SIP Type - Existing Folio-SIP Registration - New Folio-SIP Registration - New Folio-SIP Registration with Payment	SIP Type Existing Folio-SIP Registration	Scheme [Redacted]	4
Folio [Redacted]	Fund [Redacted]	Investment Frequency Monthly	SIP Start Date 04/10/2020
Select Scheme Type ☒ Existing Scheme ☐ New Scheme	Folio [Redacted]	No of Installments (Minimum 6) 6	SIP End Date 04/09/2021
Scheme [Redacted]	Select Scheme Type ☐ Existing Scheme ☒ New Scheme	SIP Day 12	Minimum Amount (₹) 500.00
Investment Frequency [Redacted]	Category EQUITY	SIP Start Date 12/09/2020	Installment Amount 1500
	Invest Through ☐ Regular ☒ Direct	SIP End Date 12/02/2021	Mode Of Registration [Redacted]
	Scheme [Redacted]		Submit

Redemption & Switch

Redemption

Fund

Folio

Scheme

Balance Units 0.181

Current Value 887.41

NAV as on Date 4902.8206

Minimum Amount(₹) 100.00

Redemption Type

☒ Partial ☐ Full

Redemption Mode

☒ Units ☐ Amount

Redemption Value

Units

Payout Bank

Submit

Switch

Fund

Folio

Switch Out Scheme

Balance Units 0.181

Current Value 887.41

NAV as on Date 4902.8206

Minimum Amount (₹) 100.00

Category

EQUITY

Switch

Sub ARN Code

ARN-

Sub Broker Code

EUIN Declaration

☒ Yes ☐ No

Switch Type

☐ Partial ☒ Full

Switch Mode

☒ Units ☐ Amount

Switch Value

Units

Submit

STP & SWP

STP

Fund

Folio

Transfer From Scheme

Balance Units:

Current Value:

Transfer To Category

Invest Through

Regular

Direct

STP

Number of transfers

STP Date

Transfer Period

From

To

STP option

Minimum Amount (₹)

Transfer Amount per instalment

Transfer Amount per instalment

Submit

SWP

Fund

Folio

Scheme

Balance Units

Current Value

Withdrawal Option

Number Of Withdrawals (Minimum: 2)

SWP

Withdrawal Frequency

SWP Day

Withdrawal Period

From

To

Minimum Amount(₹):

Amount

Enter Amount

Submit

eNACH

← eNACH

PAN

Name

Email

You have Initiated the Enach successfully with Reference Number : 1302898929.

OK

Mobile

Submit

First Name

Second Name

Contact No

Email ID

BANK Name

IFSC Code

Bank A/c No

Utr Amount

1000000

(Min Rs- 500 Max Rs- 10 Lacs)

Start Date

28/08/2020

End Date

31/12/2099

☒ I agree

I am authorizing bank to debit my account, based on the instructions as agreed. I have understood that transaction charges may change due to changes in applicable transaction charges. I hereby verify and I am authorized to cancel/ amend the mandate (if applicable) communicating the cancellation / amendment request to the bank where I have authorized the debit. Default frequency: *As and when required.

Confirm

- After Submission of eNACH investor receive an email along with SMS to complete the eNACH (KOTM) registration.

Transactions – Phygital Mode

The image displays three sequential screens from a mobile application:

- Transact Screen:** Features a 'Select Transaction Mode' section with two radio buttons: 'Digital Mode' and 'Phygital Mode'. The 'Phygital Mode' option is selected. A blue 'Submit' button is located below the selection area.
- New Purchase Screen (Form):** Contains input fields for 'Fund' (a dropdown menu), 'Email ID' (filled with 'bhavyarathan@gmail.com'), and 'Mobile Number' (filled with '8328212929'). Below these is a 'File' upload section with a dashed border, a green cloud icon, and the text 'Upload Order Form'. A green checkmark and the message 'File uploaded Successfully.' are visible. A blue 'Submit' button is at the bottom.
- New Purchase Screen (Confirmation):** Shows a confirmation message: 'You have initiated the New Purchase successfully with Reference Number : 99388202.0.' with a green checkmark icon. Below the message is a blue 'OK' button and a 'Submit' button.

A bottom navigation bar is visible on the first screen, with icons for Home, Portfolio, Transact (highlighted), Objection, and Feedback.

- Phygital Mode transactions electronic time stamp, electronic barcode and reference number will be printed on the image.
- KFIN Server uploaded time is considered for time stamp.

NCT

The image displays two mobile application screens for the NCT (New Customer Transfer) process. Both screens have a purple header with a back arrow and the text 'NCT'.

Left Screen:

- Fund:** A dropdown menu with a blue arrow icon.
- Folio:** A dropdown menu with the text 'Select Folio' and a blue arrow icon.
- NCT Type:** A dropdown menu with the text 'Select NCT Type' and a blue arrow icon.
- Email ID:** A text input field with a blue arrow icon.
- Mobile Number:** A text input field with a blue arrow icon.
- File:** A dashed box containing a green cloud icon with an upward arrow and the text 'Upload Order Form'.
- Submit:** A blue button at the bottom.

Right Screen:

- Fund:** A dropdown menu with a blue arrow icon.
- Folio:** A dropdown menu with a blue arrow icon.
- NCT Type:** A dropdown menu that is expanded, showing two options: 'CHANGE OF PHONE NUMBER' and 'CHANGE OF EMAIL_ID'.
- Email ID:** A text input field with a blue arrow icon.
- Mobile Number:** A text input field with a blue arrow icon.
- File:** A dashed box containing a green cloud icon with an upward arrow and the text 'Upload Order Form'.
- Submit:** A blue button at the bottom.

- NCT is provided in Phygital mode
 - change of phone number
 - change of eMail ID.

Objections

Objection

From Date
DD/MM/YYYY

To Date
DD/MM/YYYY

Status
Open Close

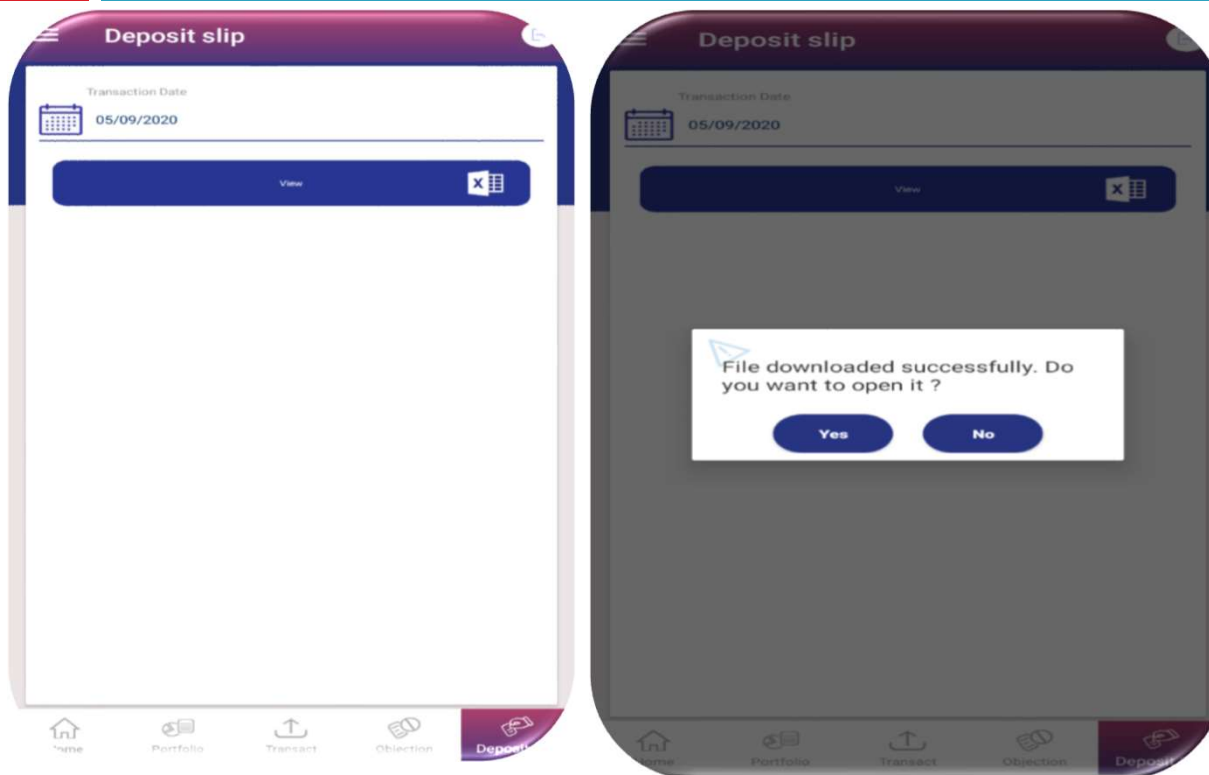
NIPPON INDIA MUTUAL FUND

IH No.	Branch	Tr Type	Barcode
No Data Found			

Home Portfolio Transact **Object** Deposits

- After Phygital Mode submission, if any objection raised by the maker will form part of objection Q
- RM will have option to clear the objections.

Deposit Slip



- Post completing the maker entry Deposit slip will be generated.



Thank You

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