Bhogilal Trikamlal Securities Pvt. Ltd.

MEMBER: BSE LTD. & NSE LTD. R-717/721, Rotunda Bldg., B. S. Marg, Fort, Mumbai - 400 023. || Tel.: 2272 1907 • Fax : 2272 2966 GST No.: 27AABCB5497N1Z2 || SEBI Regd. No.: INZ000218139 || CDSL Regd. No.: IN-DP-216-2016 Keep Walking With Common Stocks

PROCEDURE FOR DEMAT ACCOUNT OPENING.

STEP 1- INPERSON VERIFICATION

- STEP 2- PAN/AADHARLINK incometax.gov.in (link aadhar status)
- STEP 3- incometax.gov.in (Verification pan nameas per income tax)
- STEP 4-CKYC- http://www.ckycindia.in/ckyc/index.php
- STEP 5- CVL KRA- www.cvlkra.com
- STEP 6- BACK OFFICE- Account Opening Entry (maker / checker)
- SEEP 7- IBEATS EXE KYC PROCESS GENRATE UPLOAD FILE

_ EXCHANGE & DP

_LOAD

_ OPERATE ID DP NAME

_ PROCESS

STEP 8-F(BIZ – IBEATS KYC - CDSL- DP PROGRAM – CLICK CURRENT FOLDER –COPY ZIP FILE & PASTE TO CURRENT CDSL FOLDER

STEEP 9- CDSL LOGIN

HOME- NEW MODULE – BOUPLOAD –FILE LEVEL TO DO UPLOAD

STEEP 10-REPORT ID- 8/ ALL-DW& VIEW DP59 COPY & PASTE CURRENT FOLDER

STEEP 11- IBEATS EXE-KYC – IMPORT – RESPONSE –CDSL- SELECT REPONSE FILE- IMPORT – PROCESS

STEEP 12-CDSL- REPORT ID -8/DPS9 –SETUP BO ID DW & VIEW THEN COPY & PASTE CURRENT

FOLDER

STEEP 13- LOGIN DP-

IMPORT - DP MASTER FILE - DPS8 (318 351 319 320)

STEEP 14- LOGIN ADMIN DP-

A- CDSL MASTER – DP CHARGES – ASSIGN AMC CODE

B- MASTER – USER MANAGEMENT – USER MEMBERSHIP

STEEP 15- SENDING WELCOME KIT & CML COPY TO CLIENT