

STEP BY STEP GUIDE FOR ACCOUNT OPENING

- **OFFLINE ACCOUNT OPENING STEPS:**

Welcome to NAVKAR SHARE & STOCK BROKERS PVT. LTD., your trusted partner for seamless Demat and Trading account openings. We understand that initiating your trading journey is a significant step. Here's a detailed step-by-step guide for offline account opening with us:

Step 1: Gather Essential Documents Collect vital documents, including your PAN card, proof of address, proof of income (if applicable), bank account details, recent passport-size photographs, and trading preference details.

Step 2: Obtain Account Opening Forms Download the account opening forms from our official website or pick them up directly from our head office.

Step 3: Fill in Account Opening Forms Thoroughly fill out the account opening forms, providing accurate information. Specify your trading preferences for specific market segments.

Step 4: Select Trading Preferences Indicate your trading preferences by selecting the desired market segments (e.g., equities, derivatives, commodities). If you choose not to trade in a particular segment, kindly mark accordingly and sign.

Step 5: Nomination Process Ensure the security of your investments by completing the nomination process. This step safeguards your holdings for the future.

Step 6: Sign the Forms Review the forms, sign where required, and acknowledge your agreement with our terms and conditions.

Step 7: Attach Necessary Documents Attach photocopies of the necessary documents, including proof of identity, address, income, bank account details, PAN card, and photographs.

Step 8: Visit Our Head Office Pay a visit to our head office to submit the completed forms and documents for verification.

Step 9: Undergo Personal Verification Undergo a personal verification process, which may involve a face-to-face meeting or video verification. This step ensures the validity of your identity and information.

Step 10: Application Processing Once successfully verified, we'll process your application for both the Demat and Trading accounts.

Step 11: Receive Your Account Numbers Upon successful processing, you will be issued your unique Trading account number or customer ID. This identifier is crucial for your trading activities.

Step 12: Obtain DP Debit and Pledge Instruction You'll receive the Debit and Pledge Instruction (DPDI) form. This instruction, though voluntary, empowers you to perform on-market sale, pledge, and tender offers using your holdings.

Step 13: Begin Your Trading Journey Congratulations! With your Demat and Trading accounts established, you're now poised to begin your trading journey with NAVKAR SHARE & STOCK BROKERS PVT. LTD. Explore an extensive array of trading opportunities in the capital markets.

At NAVKAR SHARE & STOCK BROKERS PVT. LTD., your financial prosperity and security are our prime concerns. Our comprehensive guide ensures every aspect of offline Demat and Trading account opening is covered. Your satisfaction remains our priority.

- **ONLINE ACCOUNT OPENING STEPS:**

We do not have online account opening facility.

Or Else.

Step 1: Visit Our Website

Access our official website www.navkardirect.com and navigate to the "Online Account" tab Or visit <https://ekyc.navkardirect.com/index.aspx>

Step 2: Provide Personal Details

Using Mobile & Email ID, Start registering yourself with us and then Enter your personal information, including your name, contact details, PAN card, Aadhaar number, and other required details.

Step 3: Choose Account Type Select the type of account you wish to open – Demat, Trading or both.

Step 4: Video In-Person Verification (IPV) Conduct a Video IPV through your webcam or mobile camera in the link that will be sent to your email id.

Step 5: Select Trading Preferences Specify your trading preferences by choosing the desired market segments (e.g., equities, derivatives, commodities). If you choose not to trade in a particular segment, kindly indicate accordingly.

Step 6: Nomination Process Complete the online nomination process to secure your investments for the future.

Step 7: Obtain Demat Debit and Pledge Instruction: The Debit and Pledge Instruction (DPDI) form is voluntary, however it empowers you to perform on-market sale, pledge, and tender offers using your holdings without any physical slips and by secure and seamless way. You may opt for the same via online selection facility.

Step 8: Authenticate Using Aadhaar for a secure and seamless experience, we use Aadhaar-based authentication. Your details and documents will be fetched through the Aadhaar Based System or DIGILOCKER or Officially Valid Document duly e-signed as per SEBI requirement.

Step 9: Signature E-sign Using Aadhaar E-sign the application forms digitally using your Aadhaar-based e-signature for a paperless and efficient process.

Step 10: Verification and Approval Our team will review the information provided during the online application and verify it. Once verified, your application will be approved.

Step 11: Receive Account Numbers Upon approval, you will receive your unique Trading account number or customer ID via email.

Step 13: Access Your Account You will receive login credentials to access your Trading account online.

Step 13: Begin Your Trading Journey Congratulations! With your Demat and Trading accounts set up, you're now poised to begin your trading journey with NAVKAR SHARE & STOCK BROKERS PVT. LTD. Explore a wide array of trading opportunities in the capital markets from the comfort of your home.

At NAVKAR SHARE & STOCK BROKERS PVT. LTD., your financial prosperity and security are our prime concerns. Our online account opening process ensures convenience, security, and efficiency. Your satisfaction remains our priority.