

DO's and DON'Ts FOR INVESTORS

(Ref: SEBI Circular no. SEBI/HO/IMD-II/IMD-II_DO10/P/CIR/2021/00677 dated December 10, 2021)

Do's

1. Check registration status of the Mutual Fund on SEBI website before transacting with them.
2. Read all Scheme related documents and understand the scheme features and the risks involved and suitability of the scheme to the investor's risk profile.
3. Provide and keep updated KYC details including address, tax status, residency, and other key information such as PAN & bank account details.
4. Provide own email address and mobile number and to promptly notify changes to this information, if any.
5. Check Account Statement & Common Account Statements for discrepancy, if any and promptly bring any such discrepancies to the notice of the Asset Management Company.
6. Read communications / notices / addendums / press releases, etc. sent / or published by the mutual fund via newspapers, email, etc.
7. Consider availing nomination facility in respect of investments made in Mutual Funds.
8. Choose the plan for investments i.e. Direct Plan or Regular Plan.
9. Invest through registered and regulated entities.
10. Keep confidential critical information such as user ID, password, etc.
11. Invest by issuing payments in the name of the Mutual fund / scheme only and not in the name of any other entity.

Don'ts

1. Do not invest based on speculation, rumor or informal advice.
2. Do not fall for the promise of indicative or exorbitant or assured returns.
3. Do not issue blank cheques or blank signed transaction instructions.
4. Do not use third-party bank accounts for fund flows for subscription or redemption of units.