

EMPOWERING ATMANIRBHAR INVESTORS



Building a Nation of Confident
and Atmanirbhar Investors

Empowering **Atmanirbhar** Investors

with CDSL's

Convenient

Dependable

Secure

Demat Accounts

Central Depository Services (India) Limited (CDSL), is India's first and only listed Depository dedicated to empowering investors across the nation with reliable and secure digital services.



A Digital Toolkit

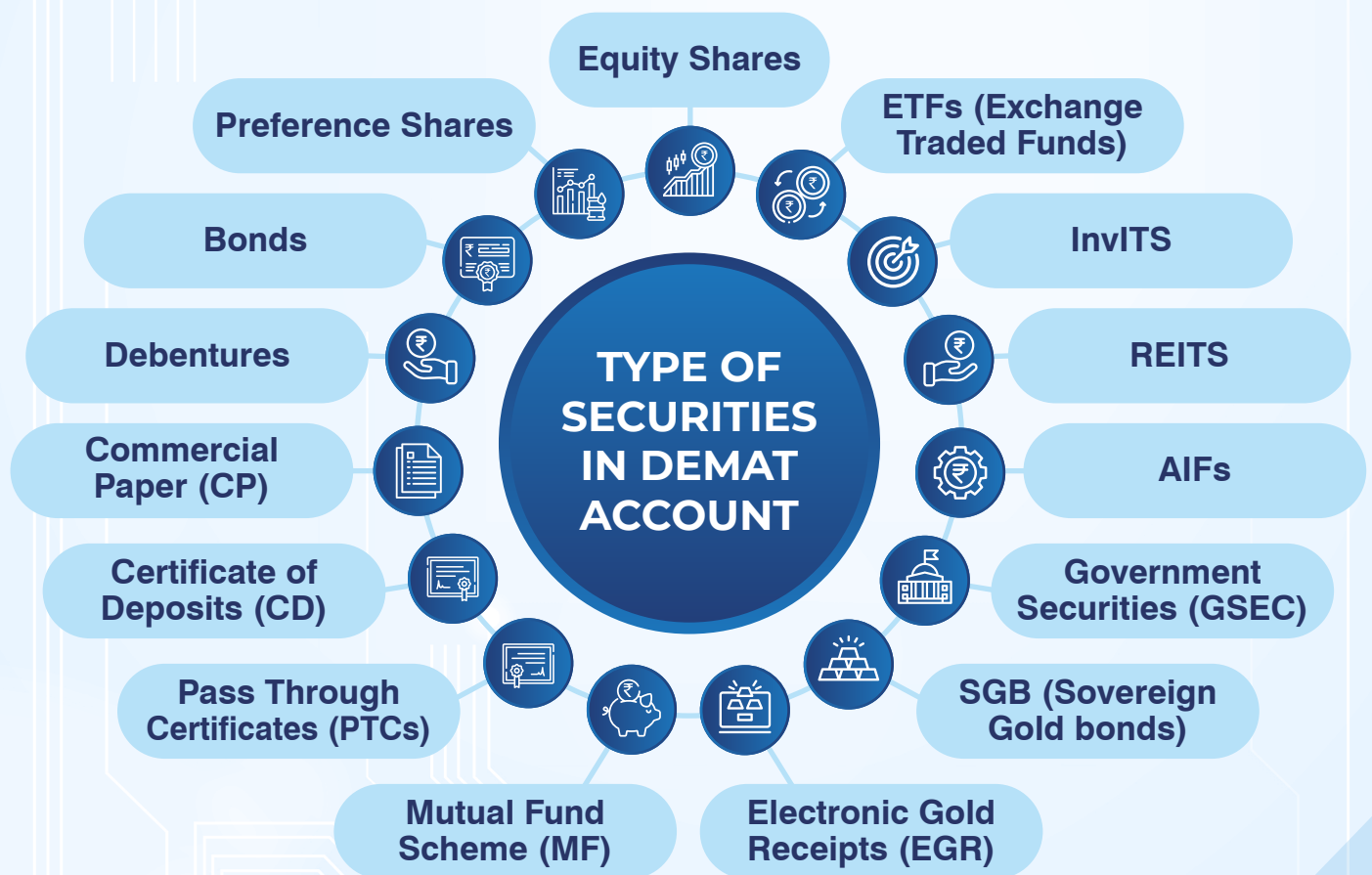
to become an Atmanirbhar Investor



Demat Accounts

A 'Demat account' (Dematerialised Account) is a commonly used term in trading and investments. It refers to the electronic means by which investors can securely hold, trade, and monitor shares, ensuring smooth and efficient transactions.

Investors can hold all securities admitted to the Depository in their Demat account.



Both Listed and Unlisted Securities

Why do I need a Demat account?

As a secure and easy way to hold shares and securities in electronic form,



- ▶▶ Eliminates risks arising from fraud, theft or damage of paper-based securities.
-



- ▶▶ Single account for all
 - Keep track of all your investments through a single account.
 - Odd lot: buy or sell even a single share.
-



- ▶▶ Reduced cost and time for transaction processing and settlement. You can store and transact large volumes of securities efficiently without incurring any additional expenses.
-



- ▶▶ As per latest SEBI guidelines, you can opt to hold securities such as share certificates in physical form or Demat form. However, with effect from April 01, 2019, securities can be transferred only if the same are held in Demat form.
-



- ▶▶ Corporate actions benefits like dividends, refunds, or interest are automatically available to the Demat account holders. Bonus issues, right shares, or stock split are automatically updated in the Demat account.
-

Demat Account Number

Every Demat Account has its own unique 16 digit Demat account number which is also known as Beneficiary Owner ID or BO ID.

In the case of CDSL, it is a combination of the DP ID (first 8 digits) & the customer ID (last 8-digits)

BO ID starts with number i.e.

12010000 00000001

DP ID

Customer ID

List of securities you can hold in your CDSL Demat account:
Click here to know the list

<https://www.cdslindia.com/eservices/Investors/InvestorCorner>

Depository

Depository is a facilitator for holding of securities in the dematerialised form and an enabler for securities transactions.

Depository is like a bank for securities that provides Demat services to the investors through their registered Depository Participants (DPs) (like branches of banks).

To avail the services offered by a Depository, an investor has to open a Demat account with a registered Depository Participant (DP) which provide various services to the investors like opening and maintaining of a Demat account, dematerialization of shares, transfer of shares, pledging of shares, freezing of account etc.

List of DPs

<https://www.cdslindia.com/eservices/DP/DPlist>

CDSL

Central Depository Services (India) Limited (CDSL) was founded in February 1999 to fulfill one goal: convenient, dependable, and secure Depository services. Over two decades later, everything we have done – from building on the values we have established to the dematerialization of various asset classes and e-services – has supported this singular goal at an affordable cost.

We are a Market Infrastructure Institution (MII) and a crucial part of the Capital market structure, providing services to all Market participants - Exchanges, Clearing Corporations, Depository Participants (DPs), Issuers and Investors.

Choose to become an **#AtmanirbharInvestor** with CDSL's services that guide you towards a financially secured future.



CDSL

INVESTOR PROTECTION FUND TRUST

ACCOUNT OPENING

How to Open CDSL Demat Account



Approach CDSL's Depository Participant (DP)



Select them based on the services they provide & your convenience



Submit your KYC Details:

- **Proof of Identity - PAN**
- **Proof of Address - Bank Details**

Provide additional documents for KYC (Know Your Customer) procedure. Reduce the risks of investment by opening a Demat account through a convenient, reliable & registered DP.

List of CDSL DPs

<https://www.cdslindia.com/eservices/DP/DPlist>

Once you make your selection, you will be taken to an informative page of your chosen DP. The page will give information regarding tariff structure of the DP and service centres. Make an informed decision by comparing DP tariff structures.

ACCOUNT OPENING

Be an #AtmanirbharInvestor



Do's

- Read the account opening form carefully before signing.
- Register with your own email id and mobile no. while opening a Demat account for receiving alerts.
- Ensure bank details are correctly updated and linked to your Demat account (since dividends & redemptions will be directly credited to your Bank account).

Don'ts

- Don't deal with unregistered intermediaries.
- Don't share your Demat account credentials (password) with anyone.
- Avoid cash payment for Demat charges. Choose alternatives like cheque, internet banking to mark a trail in case of future disputes.

NOMINATION

Be an #AtmanirbharInvestor



Do's

- Always appoint nominee/s in your Demat account.
- Only individual account holders can nominate.
- You can add/change nominee till the account is operational.
- Sole/joint holders can appoint a nominee/s.
- You can have a maximum of 3 nominees for a Demat account.
- A minor represented by a guardian can be appointed as a nominee.

Don'ts

- Non-individuals cannot nominate or be appointed as a nominee.
- POA holders cannot add/change nominee.
- Minor account holders cannot appoint nominee/s.
- Sole / joint holders cannot nominate themselves as nominee/s.

DEMAT DEBIT AND PLEDGE INSTRUCTION (DDPI)

Be an #AtmanirbharInvestor



DDPI is an optional document that authorizes the Stock Broker/Depository Participant to access Demat account for a limited purpose of meeting pay-in obligations and for settlement of trades executed by BO.

The DDPI shall serve the same purpose of a POA and significantly mitigate the misuse of a POA.

DDPI can be used for the following purposes:

- The stocks in which you have traded can be debited by your broker for pay-in.
- Shares can be pledged for margin.
- Mutual fund units can be redeemed or
- Shares can be debited for a buyback if you participate in it.

SMART FACILITY

(SMS ALERTS RELATED TO TRANSACTIONS)

Be an #AtmanirbharInvestor



Do's

- Always update your mobile number in your CDSL Demat account.
- Register for CDSL's "SMART" facility that enables you to receive SMS alerts for debits and corporate action credits.
- Check your mobile messages (SMS) for OTP in case of an off-market or Margin Pledge Transaction in your Demat account.

Don'ts

- Don't forget to update your Demat account in case of a change in mobile number.
- Never share or forward OTPs for Demat account transactions.
- Don't ignore any CDSL SMS alerts for unauthorized debits made in your Demat account & Contact your DP immediately.

UPDATE YOUR CDSL DEMAT A/C DETAILS

Be an #AtmanirbharInvestor



Do's

- Immediately intimate the change of address or change in bank account details to your DP.
- Always keep your CDSL Demat account updated with your latest email id and mobile number.
- Go Green by assenting to share your email id with Issuers/RTAs and receive e-Notices, Annual Reports on email promptly.

Don'ts

- Don't delay in contacting your DP incase you do not receive transaction statements/ SMS Alerts on your updated email id or mobile number.



'easi' (**E**lectronic **A**ccess **T**o **S**ecurities **I**nformation) is an internet-based facility to View and Print Transaction & History Statements of the past 30 days and for a financial year (365 days).



Monitor Your Demat Account and Edit Profile.



View Multiple Demat Accounts with Single Login Id.



View & Print Transaction, Holdings and previous financial years statements.



Access to Consolidated Account Statement (CAS).



Stay Updated with Latest Valuation.



Avail e-locker Facility to securely store and share e-documents.



Monitoring corporate announcements - Option to add upto 25 ISINs not held in your Demat account.



Download Myeasi Mobile App available on



<https://web.cdslindia.com/myeasitoken/Home/Login>



easiest (**E**lectronic **A**ccess to **S**ecurities **I**nformation and **E**xecution of **S**ecured **T**ransactions) is an internet-based facility by CDSL to monitor and transact.



All the facilities and benefits of easi.



Facilitates Submission of Instructions by BOs.



Hassle-Free Access with CDSL's Myeasi App for easi & easiest Users.



Already an easi member? upgrade to easiest.



Monitor | Set | Freeze | Unfreeze Transactions.

Two Types of Account Transfers Available on easiest

■ Trusted Account Transfers:

Transfer of securities from a BO account to any 4 pre-notified CDSL Demat accounts of the BOs choice.

■ Account of Choice - Transfers:

Permits transfer of securities from a BO account to any other Demat account including the CM settlement accounts by means of a digital signature.

Safely Monitor & Transact with CDSL's EASIEST Facility
<https://web.cdslindia.com/myeasitoken/Home/Login>

DELIVERY INSTRUCTION SLIP (DIS)

Be an #AtmanirbharInvestor



Do's

- Ensure requisition slip and serial number order of slips are maintained.
- Strikeout any blank space on the slip.
- Always keep the DIS book safe.
- Specify the reason, consideration amount and consideration details for all off mark transactions.

Don'ts

- Do not accept a DIS book from DP unless each slip has been pre-printed with a serial number along with your Demat account number.
- Do not leave your signed Delivery Instruction Slip with anyone as it is equivalent to a bearer cheque.
(DIS is like a cheque book of your Demat account)

e-Voting

CDSL's eVoting system enables Shareholders/Members to cast their electronic votes, remotely, on company resolutions till the closure of an eVoting event.



Shareholders can cast their vote on www.evotingindia.com remotely before or during the time of AGM/EGM.



Participate in corporate decision making from a place and time of your convenience.



Attend AGM/EGM through Video Conferencing (VC) or Other Audio Visual Means (OAVM).



You can do e-Voting from online portal of your DP or click on e-Voting tab on Depository website.

DEMATERIALISATION (DEMAT)

Be an #AtmanirbharInvestor



Do's

- Always fill separate Demat Request Form (DRF) for,
 - i. Free & locked-in securities,
 - ii. Each ISIN,
 - iii. Securities locked-in for different reasons,
 - iv. Securities of diff paid-up value &
 - v. For each client a/c.
- Ensure All Demat account holders shall sign the DRF as per the specimen signature(s) recorded with the DP & Issuer/RTA.

Don'ts

- Don't forget to record distinctive numbers of securities sent, before sending securities for Demat.
- Don't forget to double-check if ISIN is active before sending a request for Demat.
- Don't forget to check if the company is in Top 200 Companies with Pending Demat requests, before sending for Demat.



CDSL's Consolidated Account Statement (CAS) provides a consolidated view of all financial securities of an investor i.e a single account statement of transactions & holdings in a Demat account(s) held with CDSL & NSDL (Depositories) as well as in Statement of Account (SOA) form with Mutual Funds (MF).



Consolidated view of Investments in Demat and MF.



Half-yearly holding statement if there is no transaction.



Monthly statement in case of any transaction in Demat or MF.



Keep your email id and CAS mode updated in your Demat account/MF Folios to avail eCAS service.

- CAS is provided based on the Permanent Account Number (PAN). In the case of multiple holding, it is based on the PAN of the 1st holder & pattern of holding.

- CAS is sent by default Depository (the Depository where the Demat account has been opened earlier)
- Investors can receive eCAS in their preferred language from a selection of 23 diverse Indian languages.

CDSL's eCAS is an Interactive CAS statement through email, which is received faster, easier to store & retrieve, password protected and eco-friendly. Approach your DP for eCAS now.

Download your CDSL CAS now :
<https://www.cdslindia.com/CAS/LoginCAS.aspx>

Grievance Redressal

CDSL's Grievance Redressal facility allows investors to seek assistance and provides redressal of Investor grievance with prompt diligence.



Contact your DP/ Issuer Company/ RTA immediately with details of your grievance.

In case the grievance remains unsolved, you may approach CDSL's Grievance Redressal Cell.
<https://www.cdslindia.com/eservices/footer/grievances>



If still not satisfied, lodge a complaint on SCORES-SEBI Complaints Redress System
<https://scores.sebi.gov.in/>

If the Investor is not satisfied with the resolution provided by DP or other Market Participants, then the Investor has the option to file the complaint/ grievance on SMARTODR platform for its resolution through by online conciliation or arbitration. <https://smartodr.in/login>



Always keep copies of your Demat Account related documentation like Agreement, letters, emails, faxes, etc.

Act quickly & approach the concerned authority for redressal of grievance.

Investor Awareness

CDSL empowers investors by educating about Depository, Capital Market Practices and Rights and Obligations of the Investor. To this end, CDSL on regular basis conducts Investor Awareness Programmes (IAPs) along with its DPs, Exchanges, Financial / Educational Institutions, Media etc.



Admission to these IAP's is free for all Individuals.



Any existing as well as prospective investors can attend these Seminars.



Entry will be on a first come, first serve basis.



Learn more about Capital Market and Demat in these IAP's.

Check out the elaborate list of IAPs to choose the best one for you.

Schedule of IAPs

<https://www.cdslindia.com/eservices/Investors/InvestorCorner>

Please download the SEBI Booklet " SECURITIES MARKET : UNDERSTANDING FROM INVESTOR'S PERSPECTIVE "

For more basic information about Securities Market, click below.

<https://www.cdslindia.com/downloads/Securities%20Market%20Booklet.pdf>

This Booklet has been jointly prepared by:

<https://www.cdslindia.com/eservices/Investors/InvestorCorner>

Securities and Exchange Board of India | Central Depository Services (India) Limited |

Bombay Stock Exchange Limited | National Securities Depository Limited |

National Stock Exchange of India Ltd. | Metropolitan Stock Exchange of India Limited

Social Media presence

CDSL has active presence on social media sites like Facebook, LinkedIn, X, Instagram and YouTube where they provide informative content regarding the Capital Market.

 <https://www.facebook.com/cdslindia/>

 <https://www.linkedin.com/company/cdslindia/>

 <https://x.com/cdslindia/>

 <https://www.instagram.com/cdslindia/>

 <https://www.youtube.com/@CDSLIndiaLtd/featured>

5 EASY TIPS TO

Be an #AtmanirbharInvestor



Explore & Do your Own Research.



Evaluate & Understand Risks Before Investing.



Learn & Stay Updated.



Patience & Focus is the Key!



Avail CDSL's Digital Services like easi/ easiest & attend Investor Awareness Programs (IAPs).

Contact us

We look forward to creating a prosperous future for every Atmanirbhar Investor & the nation's booming Economy.

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Demat Accounts

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CDSL

INVESTOR PROTECTION FUND TRUST

DEMAT DEBIT AND PLEDGE INSTRUCTION (DDPI)

Be an #AtmanirbharInvestor



Do's

- Carefully examine the scope & implications of powers before granting POA to operate your Demat account.
- POA is not mandatory for opening a Demat account.

Don'ts

- Don't give General POA to your broker. Always opt for limited purpose POA.
- Don't give non-revocable POAs. It does not authorize you the power to refuse or cancel the given POAs.

For More Information Visit: www.cdslindia.com

EMPOWERING ATMANIRBHAR INVESTORS

Building a Nation of Confident
and Atmanirbhar Investors



Consolidated view of Investments
in Demat and MF



Monthly statement in case of
any transaction in Demat or MF



Half-yearly holding statement
if there is no transaction



Keep your email id and CAS mode updated in your
Demat account/MF Folios to avail eCAS service



CDSL

INVESTOR PROTECTION FUND TRUST



Contact us

We look forward to creating a prosperous future for every Atmanirbhar Investor & the nation's booming economy. Join the 3 Cr. Aatmanirbhar Niveshak

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