

Account Opening Steps for Trading and Demat Accounts

1. We will reach out to you through your Wealth Manager/Service Manager with the account opening documents.
2. We will verify your existing KYC documents (pan card, identity proof, address proof etc.) from the KRA website and guide you to fill in the account opening forms.
3. In case your existing KYC documents on the KRA website are outdated, you will be required to submit your latest/valid documents.
4. After carrying out the necessary due diligence and Money Laundering checks, we will proceed to set up your accounts in the back-office system and exchange/depository platforms.
5. If there are any changes to your contact details, address etc, the KRA website will be updated with the latest information as per the account opening documents.
6. You will receive your account activation details along with the copy of the account opening documents within seven days from the date of account activation.

o3 Securities Private Limited

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SEBI Registration No.: INZ000291332 | Member of BSE Limited (CM) and National
Stock Exchange of India Limited (CM, F&O) Portfolio Management Services:
INP000005430 | Depository Participant (CDSL): IN-DP-CDSL-533-2010
AMFI registered Mutual Fund Distributor (ARN – 79196)