

Account closure is a request to permanently stop all trading & investing activity. You will have to re-do the account opening process to resume trading.

Alternatively, if you want to pause or take a break from trading, you can de-activate your account optionally.

### TRADING ACCOUNT CLOSURE

You can close your Trading Account Online subject to following conditions:

- There shall be No Pending Orders or Positions.
- Also, account closure shall not be processed in case of negative balance, therefore Ensure All Your Dues Are Cleared.

In case there are any funds, the same shall be required to be **Credited To Your Respective Bank Account** before Online Closure request.

### DEMAT ACCOUNT CLOSURE:

#### Full Account Closure

You can close the Demat account online fully if there are no holdings in your Demat account and you have made all the pending payments to the DP. Once you have ensured that your Demat account is fully dormant, you can raise a request to your DP for closing the Demat account.

#### Transfer and Account Closure

If your Demat account still has some holdings or you haven't made full payment for the pending charges, you have to first transfer the holdings and the pending payments to a different Demat account. Once the holdings and charges are transferred, you can raise a request to the DP to close the Demat account.

**Process to transfer shares from one demat account to another differs based on whether the receiver has a CDSL or an NSDL demat account.**

#### **If your share transfer is to another CDSL demat account:**

- a. You can follow any one of the following **Online Methods**:
  - i. You can gift the shares to your friends' or relatives' account.
  - ii. You can use CDSL easiest to transfer shares online to a different CDSL demat account
- b. You can transfer shares **Offline** by submitting the DIS forms.

#### **If your share transfer is to another NSDL demat account.**

- a. You can follow the Offline transfer process, i.e. by submitting the DIS forms to us.
- b. You can also do this Online via CDSL Easiest.

Once the closure is initiated, we will disable access to back office & front office immediately.

## **KEY POINTS TO NOTE BEFORE PLACING ACCOUNT CLOSURE REQUEST**

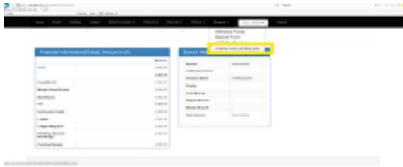
- Please note account closure is irreversible. Hence it is recommended that you download your trade book, contract notes, bills, P&L, tax and other statements before proceeding with account closure. You may need these for tax filing and compliance. You cannot download these statements once the account is closed.
- You will not be able to restore a closed account. You will have to OPEN NEW ACCOUNT and completing the signup process Once again.
- If the closure request is rejected, we will restore login access to back office and front office software.

## STEP-WISE GUIDANCE FOR ONLINE ACCOUNT CLOSURE

### [Trading & Demat Both]

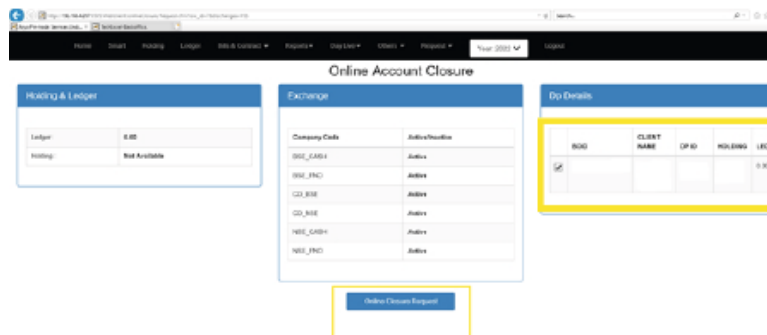
To close your account online, log in to your Back office login i.e. <http://192.168.4.207:8505/WebClient/> and follow the steps below

#### STEP-1 - Click Request-Online Account Closure

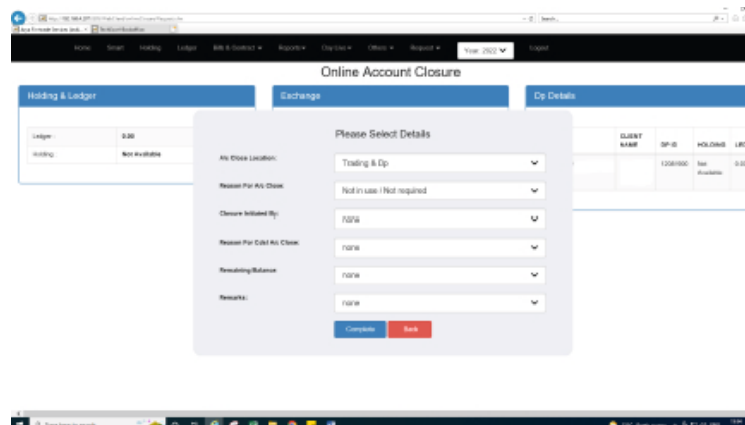


#### STEP-2 - Ensure your Demat and Fund balance is zero

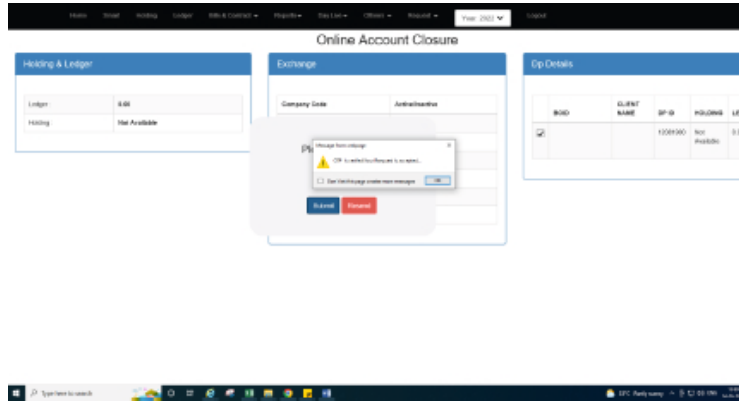
In case you want to close demat account than select the BO ID also:



#### STEP-3 - Fill the Details from the drop-down:



STEP-4 - On Clicking Complete-OTP will be sent on your registered mobile number, enter the OTP received and submit the same



STEP-5 - Verify the details as submitted by you on the displayed screen then Proceed to E-Sign and Click on Sign now THEN Accept the T&C, enter your Aadhaar number and click on 'Send OTP' AND Enter the OTP received on your Aadhaar linked mobile number and click on 'Verify OTP'.

*We will process the closure request within 5 working days on successful receipt of request.*