Now, You Can Start an SIP with Bajaj AMC in Just Three Steps

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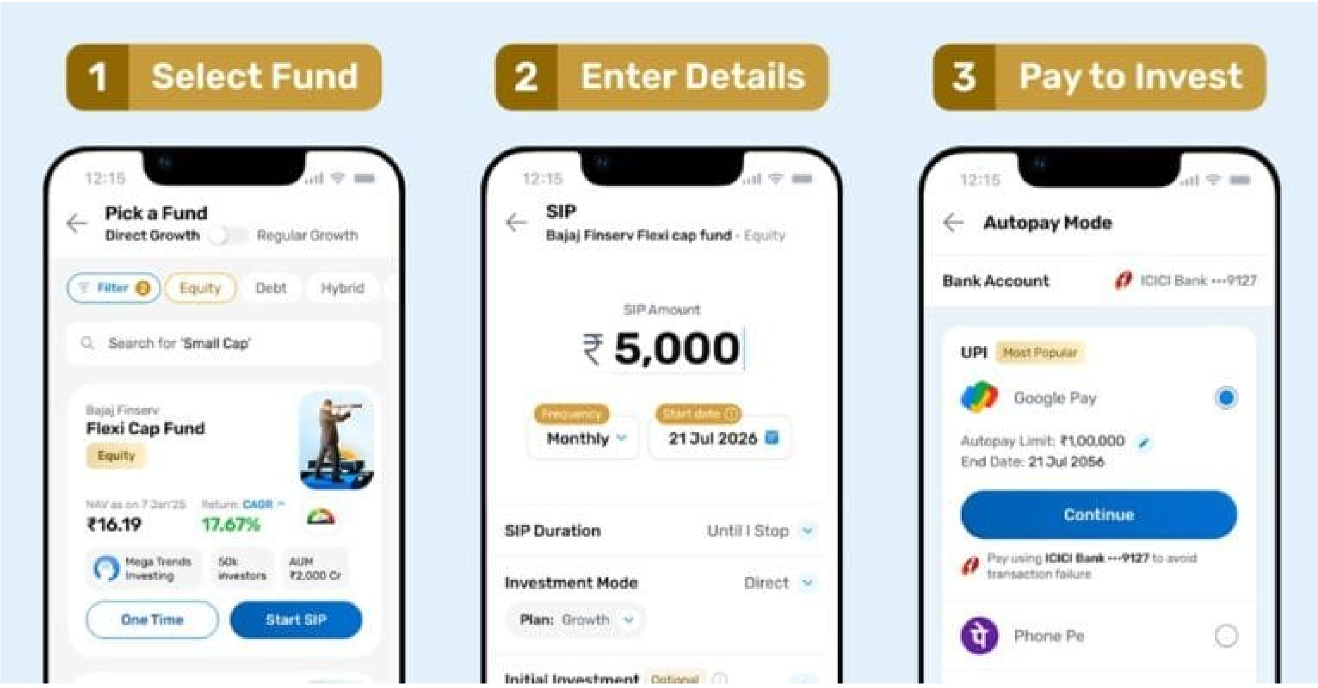
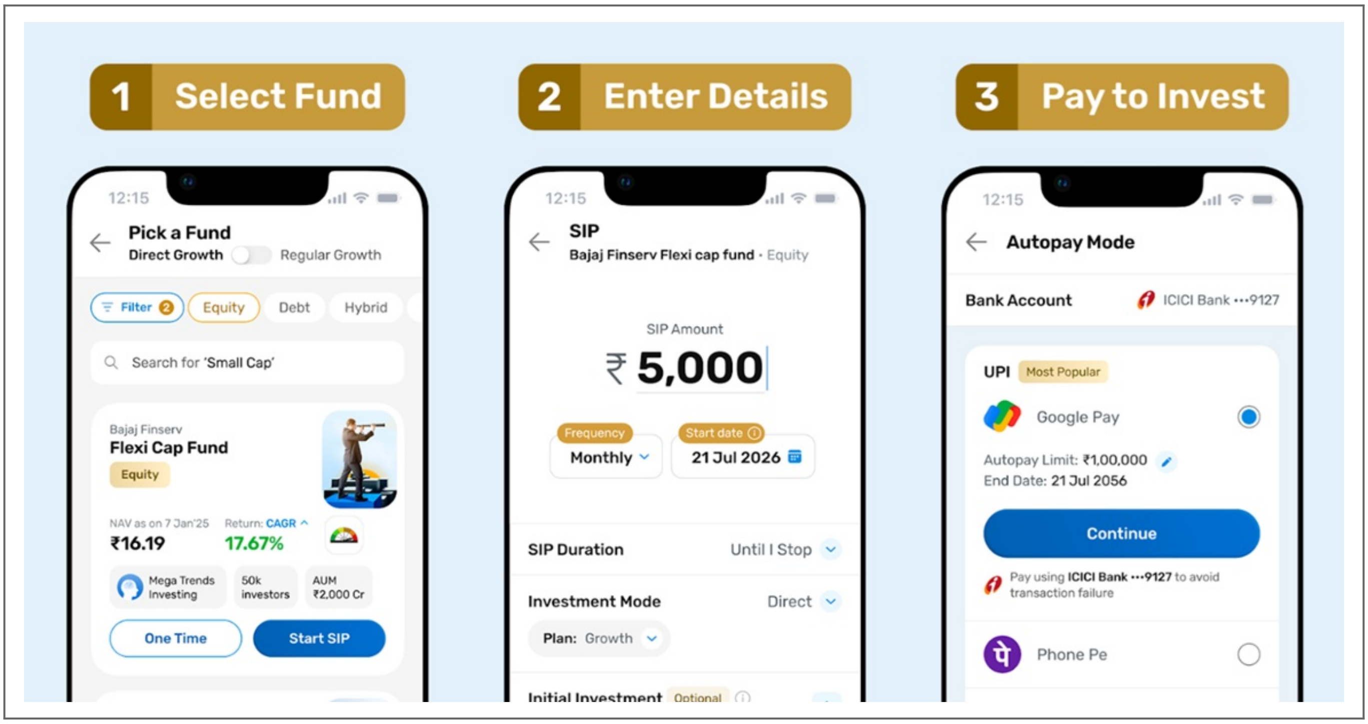


With Bajaj Asset Management Limited's new and simplified investment journey, you can now start an SIP in just three steps. There is no complicated application process or physical paperwork. The journey can be completed online, helping you put your investment plan into action and begin investing regularly towards your long-term goals.



Bajaj AMC's new SIP journey

How to start an SIP with Bajaj AMC

Before you begin, keep your PAN and registered mobile phone with you. You will also need access to the bank account from which your SIP instalments will be paid. Then, you need to follow these steps:

Step 1: Sign in and choose a fund

Click on "Invest Now" or the user icon at the top of the Bajaj AMC website (www.bajajamc.com). This will take you to the transaction portal.

There, enter your PAN and complete the required verification using the OTP sent to your registered mobile phone number or email address. You will also need to enter or set a four-digit PIN for enhanced security.

This will take you to the account home page, where you can browse the available mutual fund schemes.

Step 2: Enter and review your SIP details

Once you choose a fund, click on ‘Start SIP’. Then, enter the amount that you want to invest, the investment frequency, the start date, and the duration. You will also see an “Investment Mode” drop-down menu. Here, you can choose between a Direct Plan and a Regular Plan.

A Direct Plan is purchased directly from the mutual fund, while a Regular Plan is purchased through a mutual fund distributor. The two plans invest in the same underlying portfolio but have different expense ratios – the cost of the Regular Plan is slightly higher because it accounts for a distributor commission. Consider whether you prefer to make and manage your investments independently or with distributor assistance.

Before continuing, review all the details carefully. Then, read and accept the terms and conditions and click on “Invest”.

Step 3: Set up AutoPay

The final step is to create an AutoPay mandate. This authorises your bank to debit the SIP amount on the scheduled dates.

Choose an AutoPay method, such as UPI, net banking or debit card. You will then be redirected to your payment app or bank’s page. Review the mandate details and approve the request.

Consider choosing a sufficiently high mandate amount to give you room to add or increase SIPs later. The mandate amount only sets the maximum debit limit; the actual deduction will be based on your SIP instalment.

For the duration, if you have a fixed date in mind, you can select the number of instalments. If not, select “Until I stop” to keep the SIP active until you cancel it.

After the mandate has been successfully registered, your SIP setup is complete, and the money will be debited from your account on the scheduled date (subject to applicable processing timelines). You can also view the transaction and SIP details in your Bajaj AMC account.

For investors who already have an existing mandate with Bajaj AMC, the investment process is even simpler and quicker. Investors who are new to Bajaj AMC will need to create their account and folio through a convenient and guided onboarding journey. Those who are not KYC Validated will also need to complete their Know Your Customer process.

Bajaj Asset Management Limited or Bajaj AMC was formerly known as Bajaj Finserv Asset Management Limited.

Mutual Fund investments are subject to market risks, read all scheme related documents carefully.

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