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HSL DAO 2 IN 1
INTEGRATED JOURNEY

DEMAT ACCOUNT OPEN BY BANK

TRADING ACCOUNT OPEN BY HSL

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ADDITIONAL FEATURES OF INTEGRATED JOURNEY

Easy and smooth account opening process.

Powered by best in class FinTech API integrations with IDfy, Digio and Signzy.

Enablement of STP for fast and easy account opening.

Options of opening account through Digilocker, KRA validation and manual journeys.

Derivatives privilege activation in the account opening journey.

Promo-codes and referral programs.

Upfront option available to the customers back-track the journey.

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3 EASY STEP TO PROCESS

VERIFY

KYC

E-SIGN

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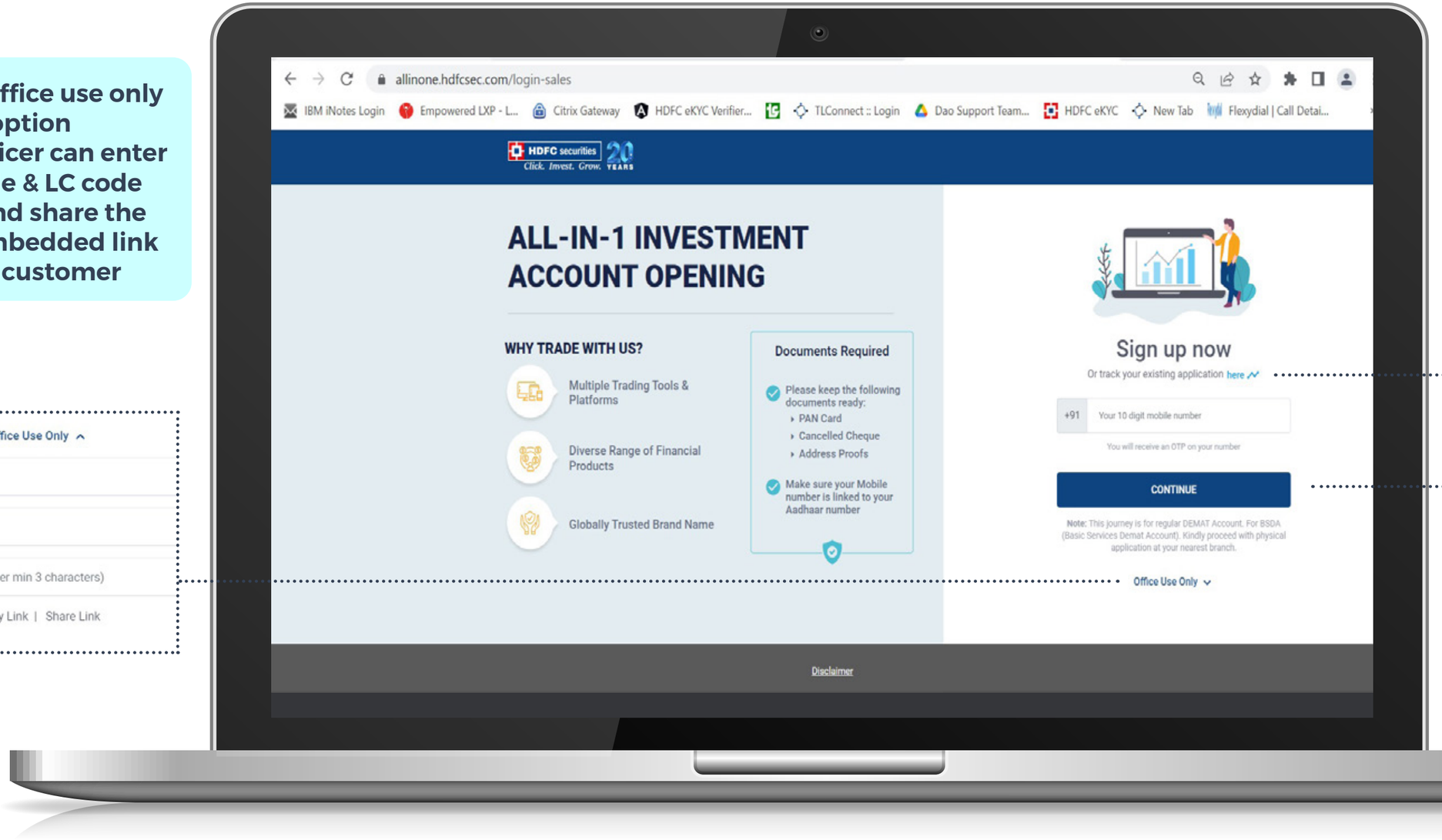
VERIFY | MOBILE VERIFICATION

Under Office use only option
Sales officer can enter LG code & LC code here and share the code embedded link with customer



Customer can track application by clicking on “Here”

Enter mobile number and press continue

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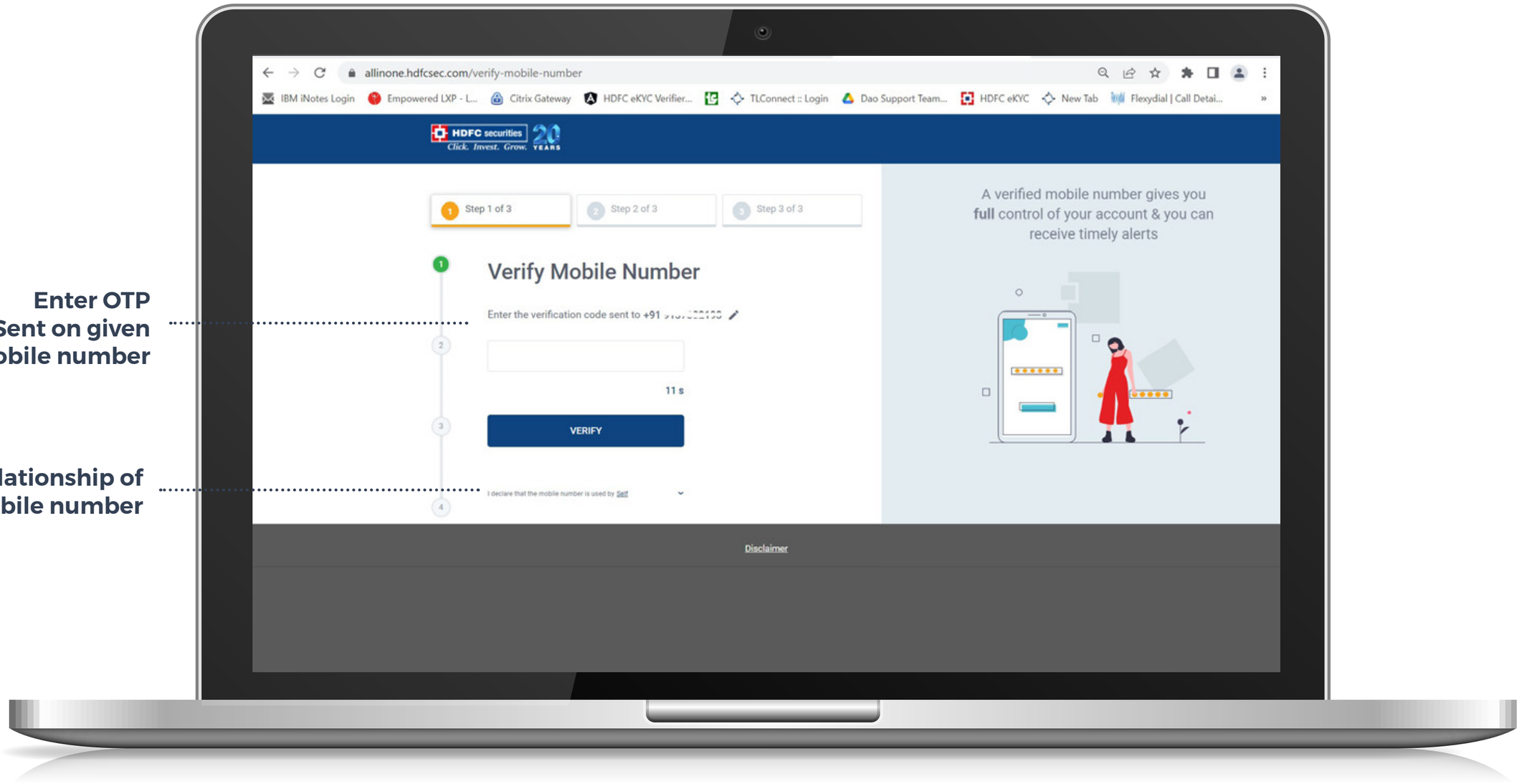
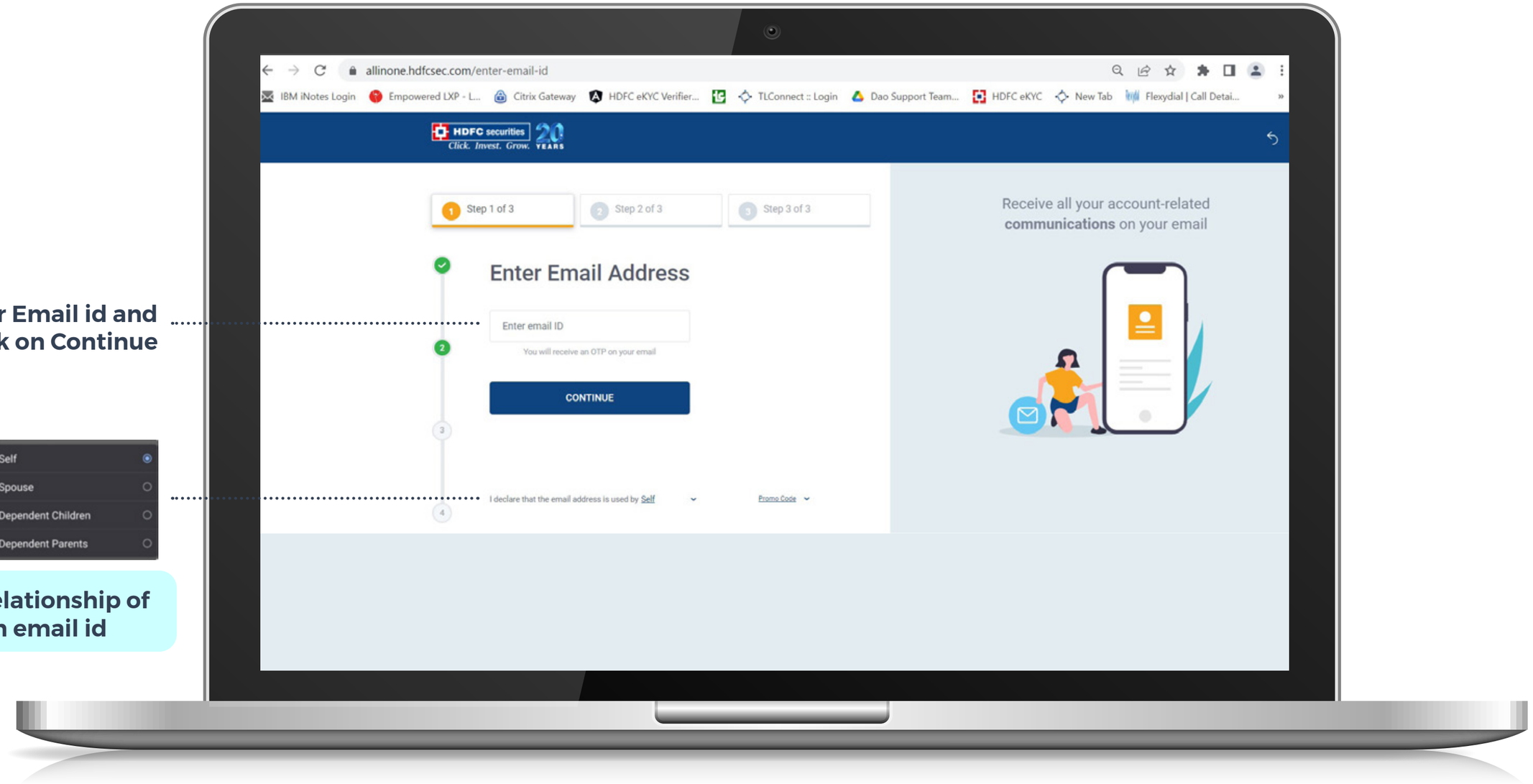
VERIFY | VERIFY MOBILE NUMBER



Enter OTP Sent on given mobile number

Select relationship of given Mobile number

VERIFY | ENTER EMAIL ID



Enter Email id and Click on Continue

Select relationship of given email id

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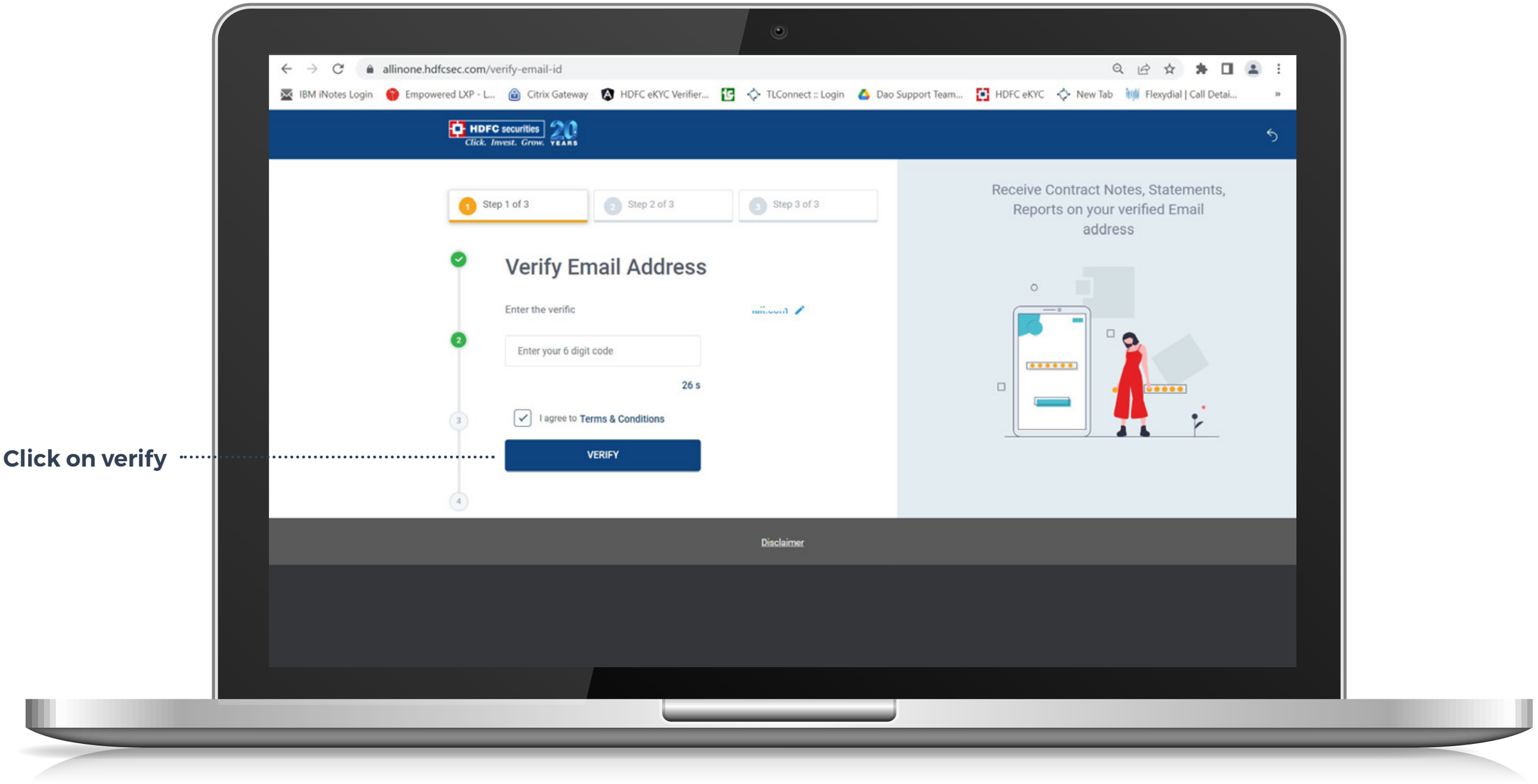
VERIFY | VERIFY EMAIL OTP



Click on verify

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VERIFY | PAN VERIFICATION

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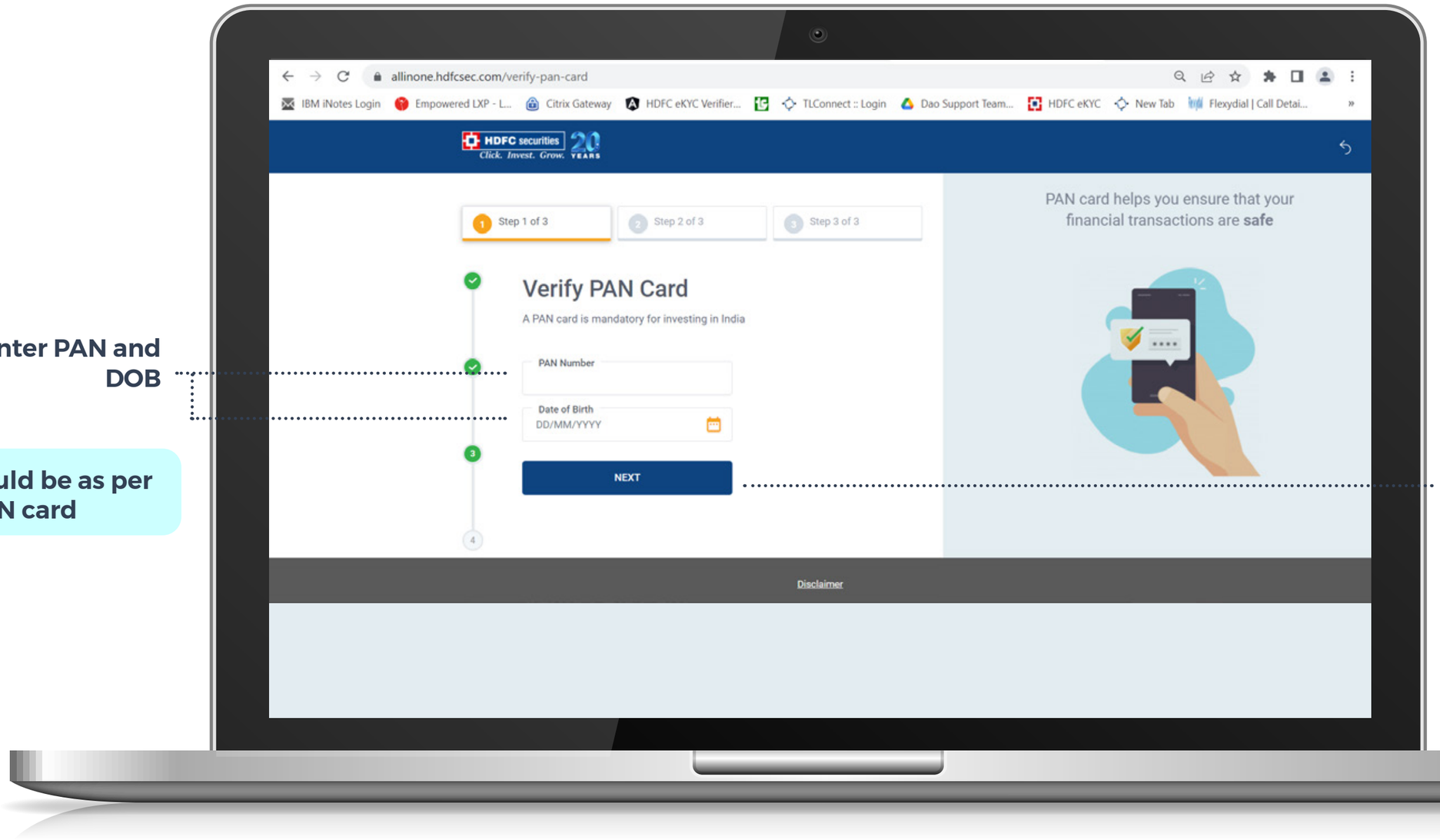
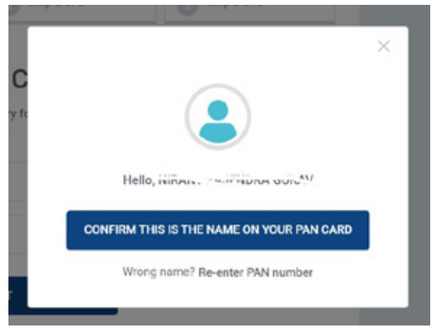
Enter PAN and DOB

DOB should be as per PAN card



If customer's PAN is KRA verified then customer will automatically proceed with KRA journey



Verify your name as per PAN and proceed

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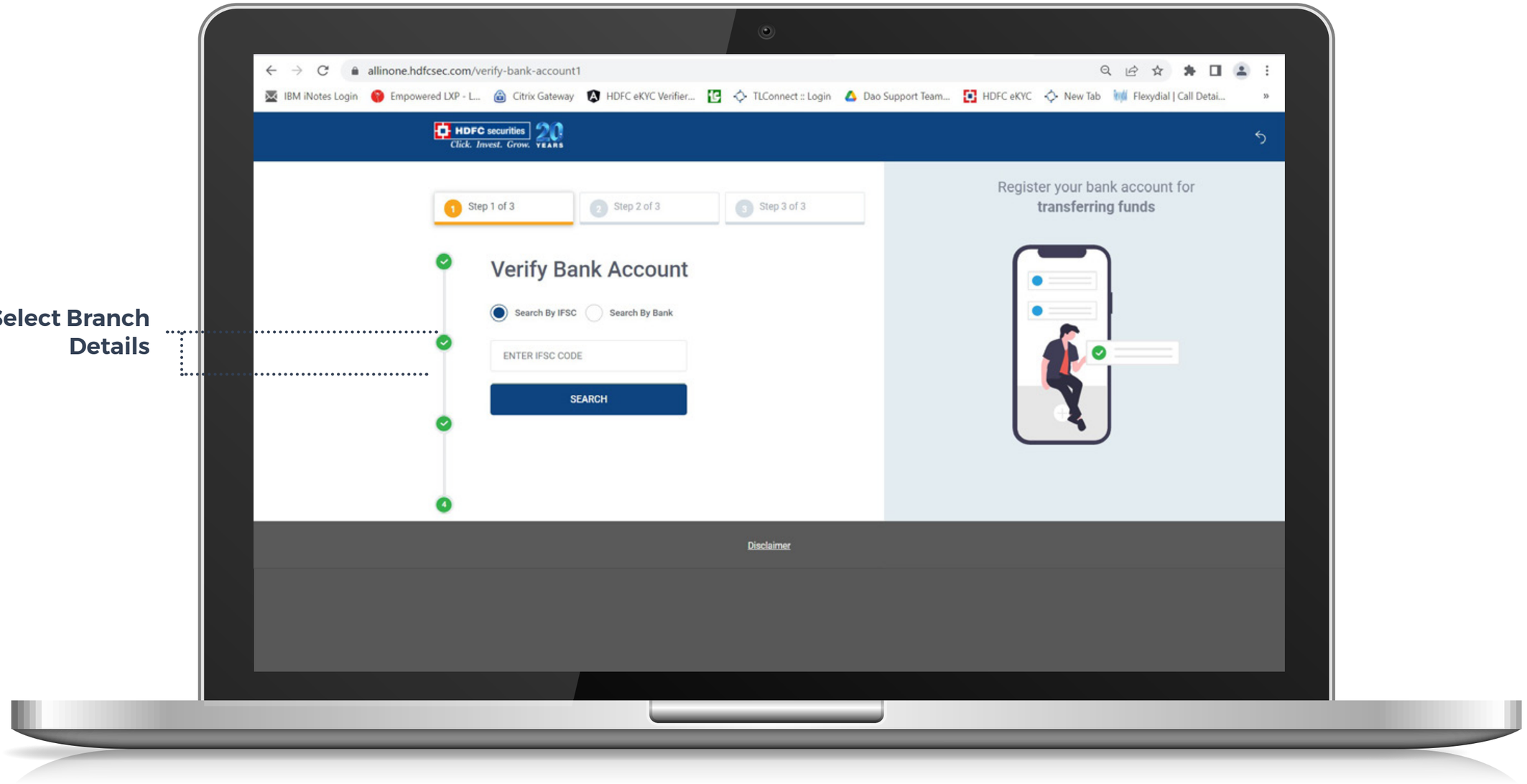
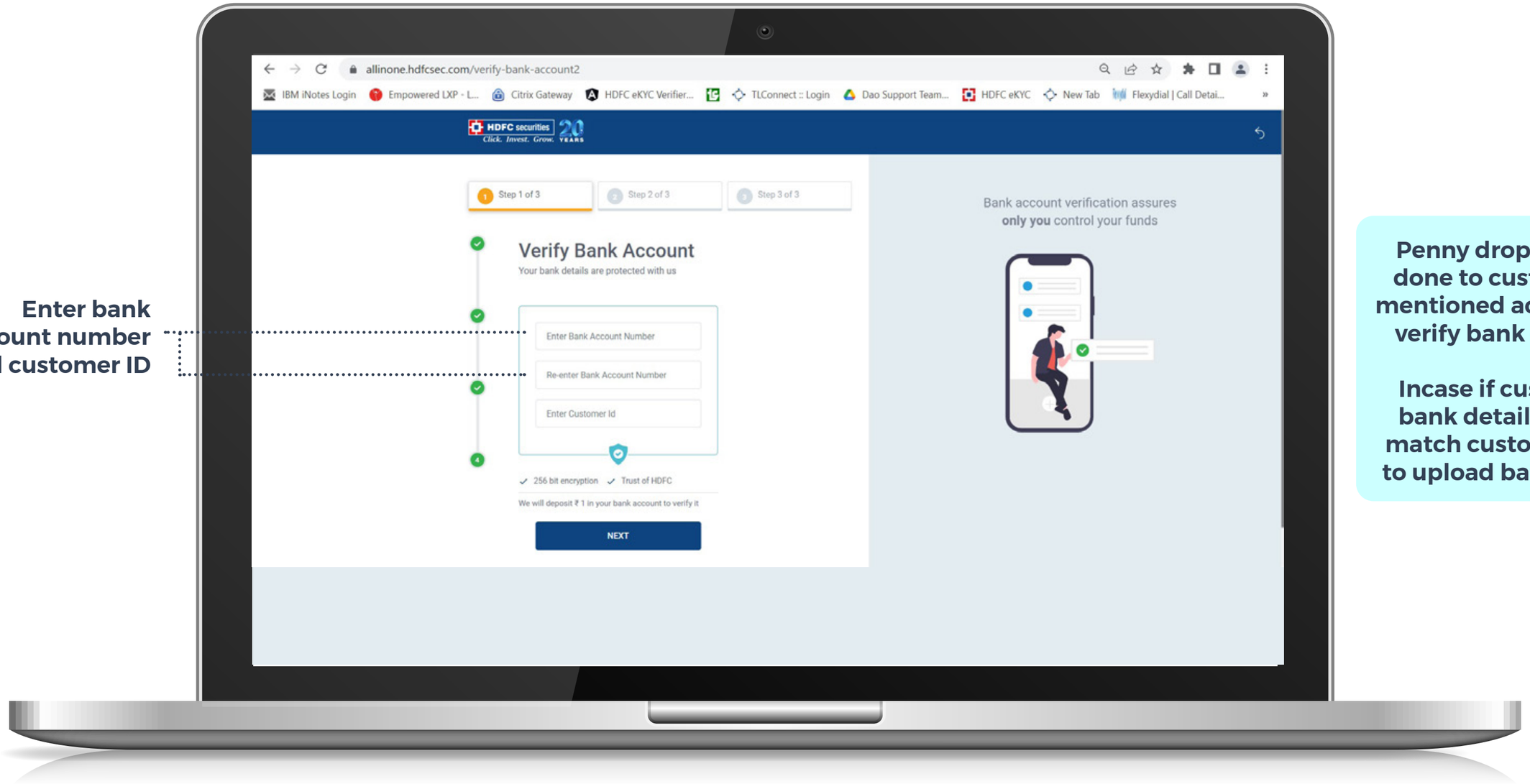
VERIFY | SEARCH BRANCH DETAILS

Select Branch Details



VERIFY | VERIFY BANK ACCOUNT

Enter bank account number and customer ID

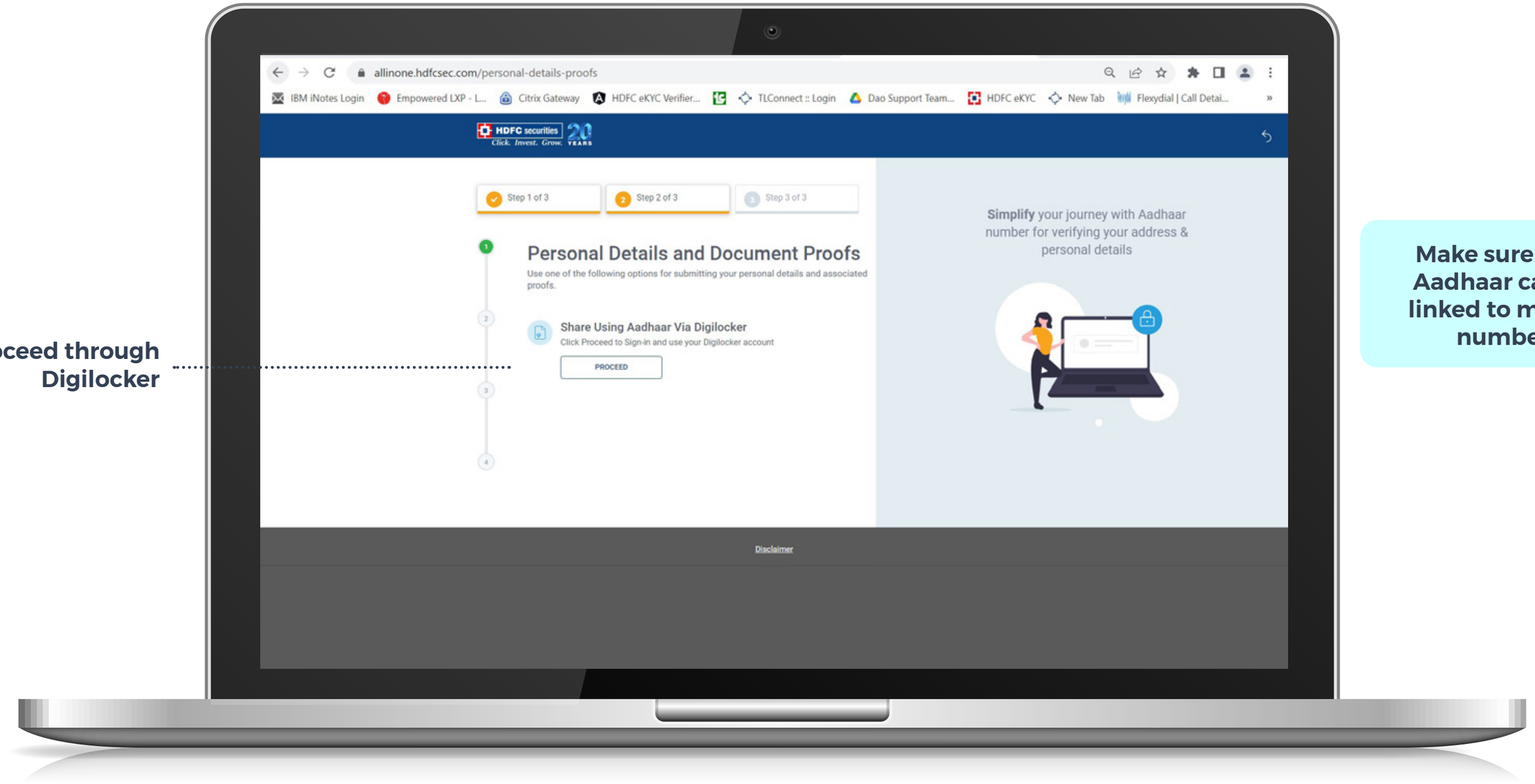


Penny drop will be done to customer's mentioned account to verify bank details.

Incase if customer bank detail do not match customer has to upload bank proof

Note: Screenshot is not accepted

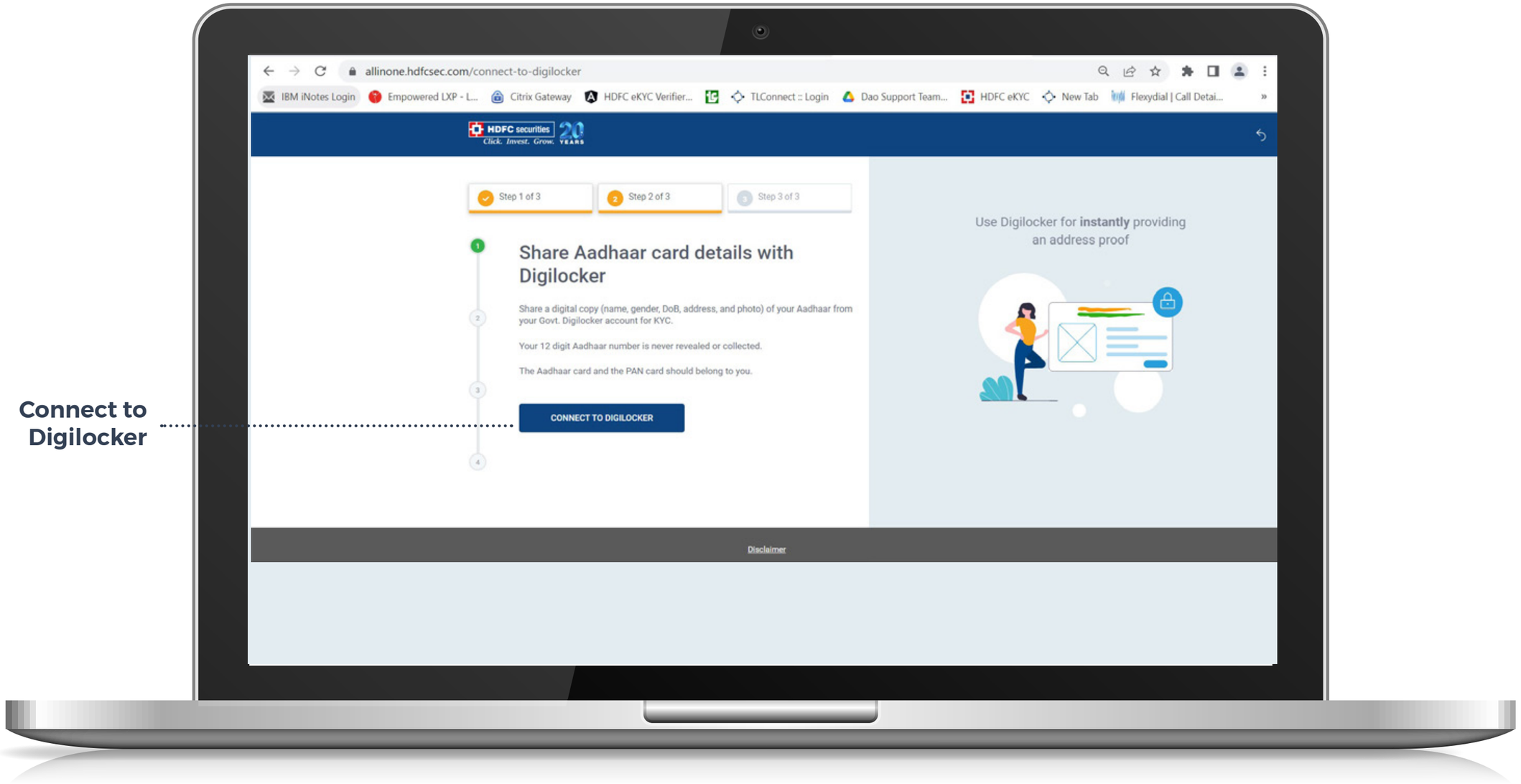
PERSONAL DETAILS AND DOCUMENTS PROOFS (CONNECT TO DIGILOCKER)



Proceed through Digilocker

Make sure your Aadhaar card is linked to mobile number

KYC | ENTER SECURITY CODE



Connect to Digilocker

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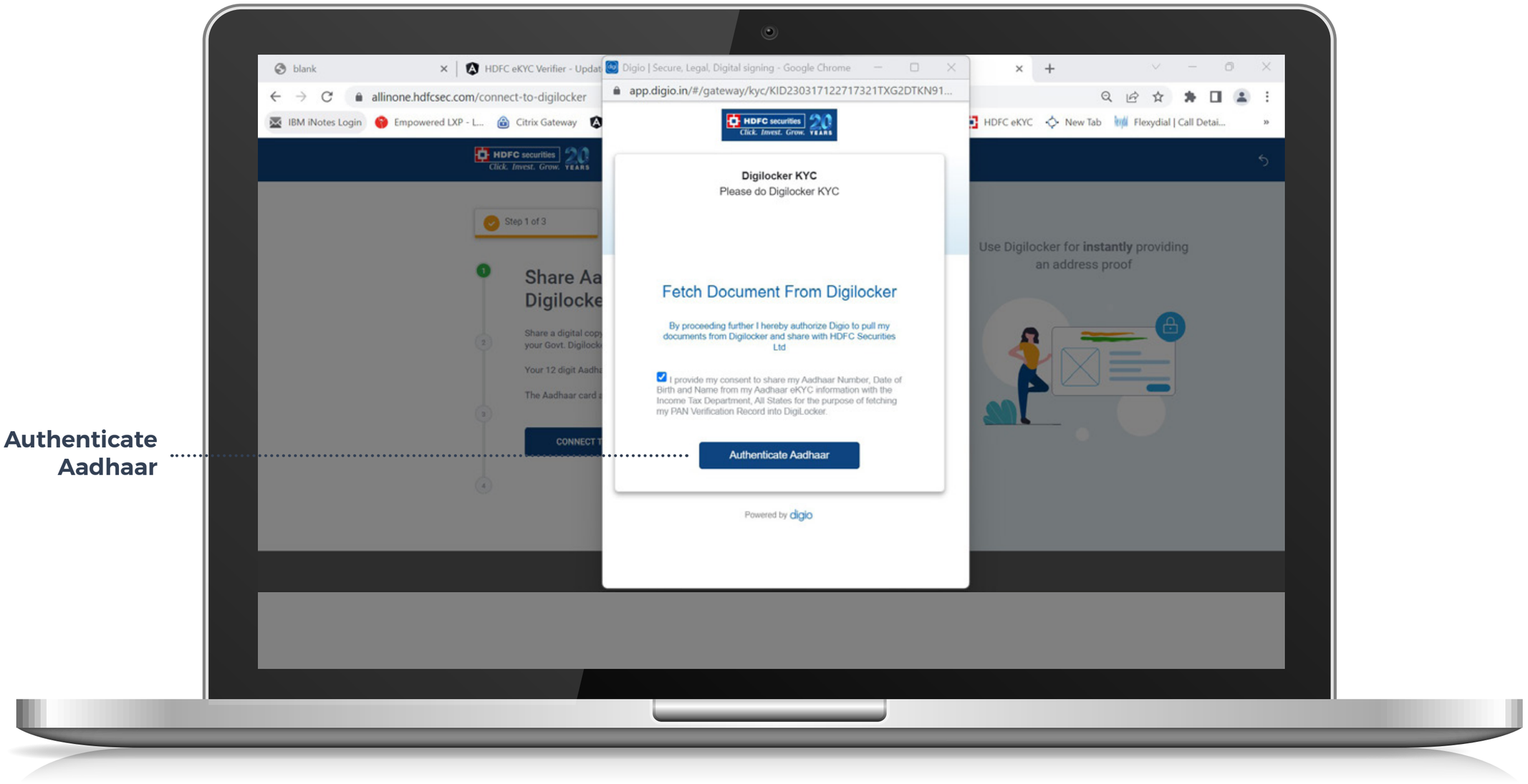
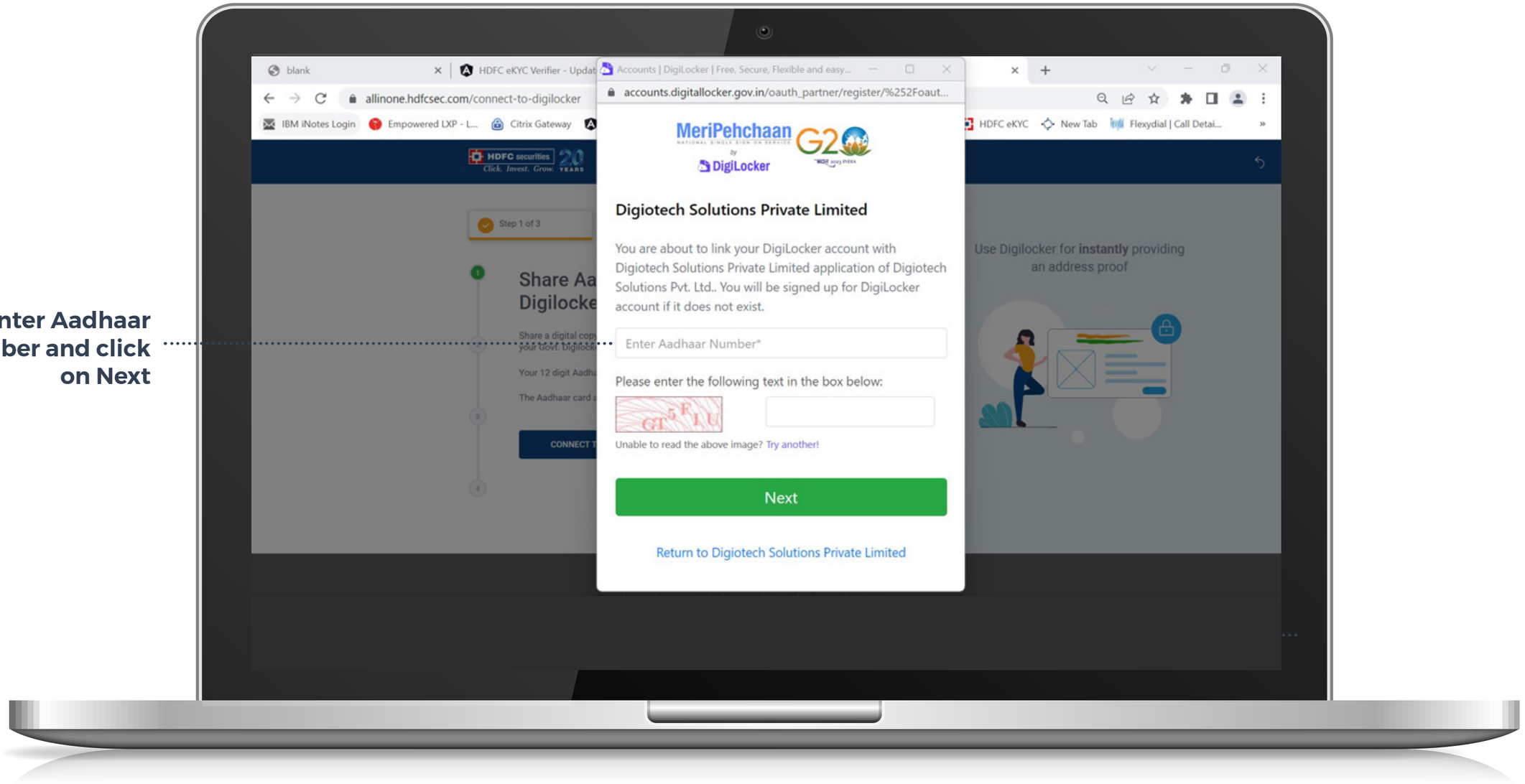
CONNECT TO DIGILOCKER



Strictly for internal use only.

KYC | ENTER AADHAR CARD NUMBER

Enter Aadhaar Number and click on Next



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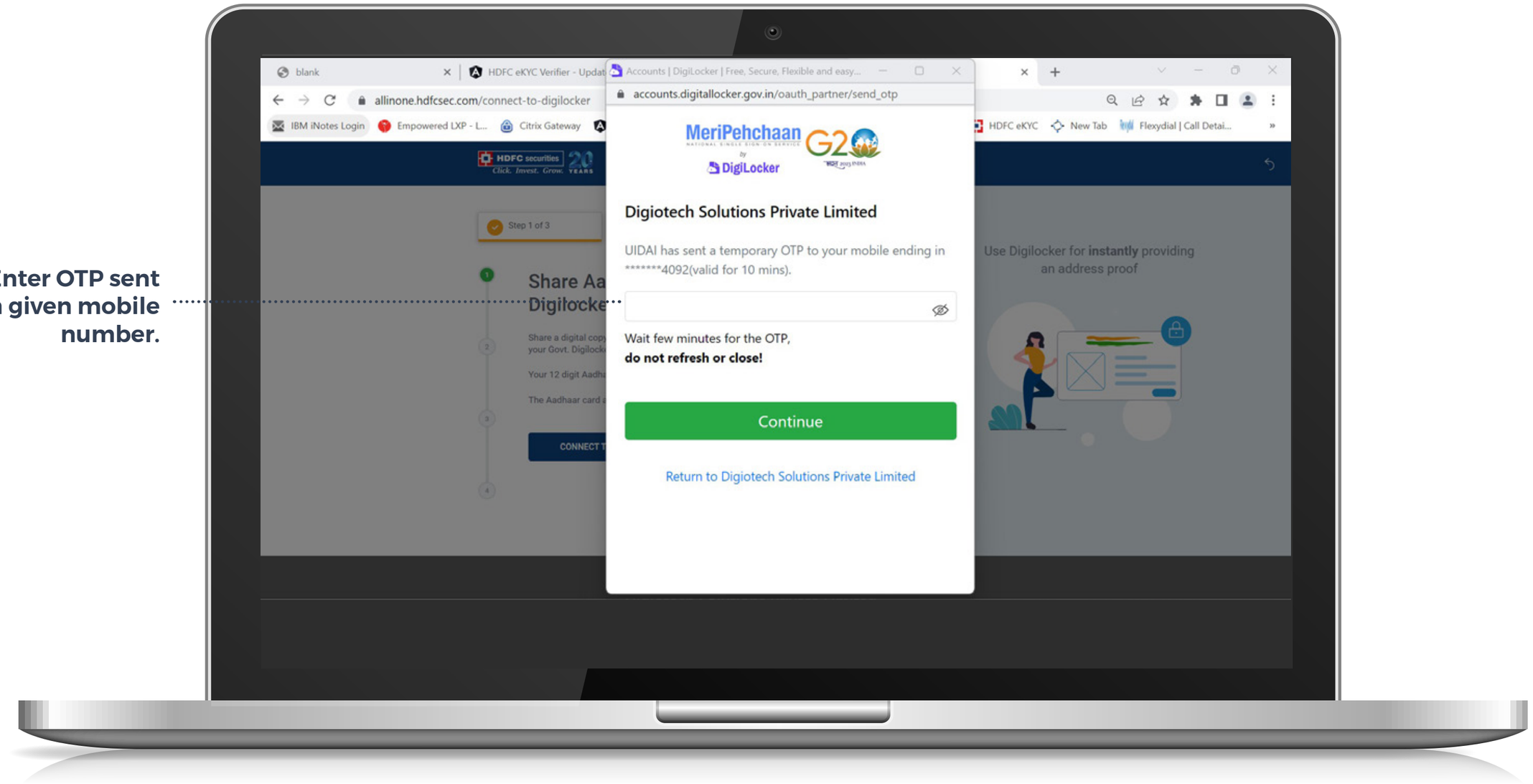
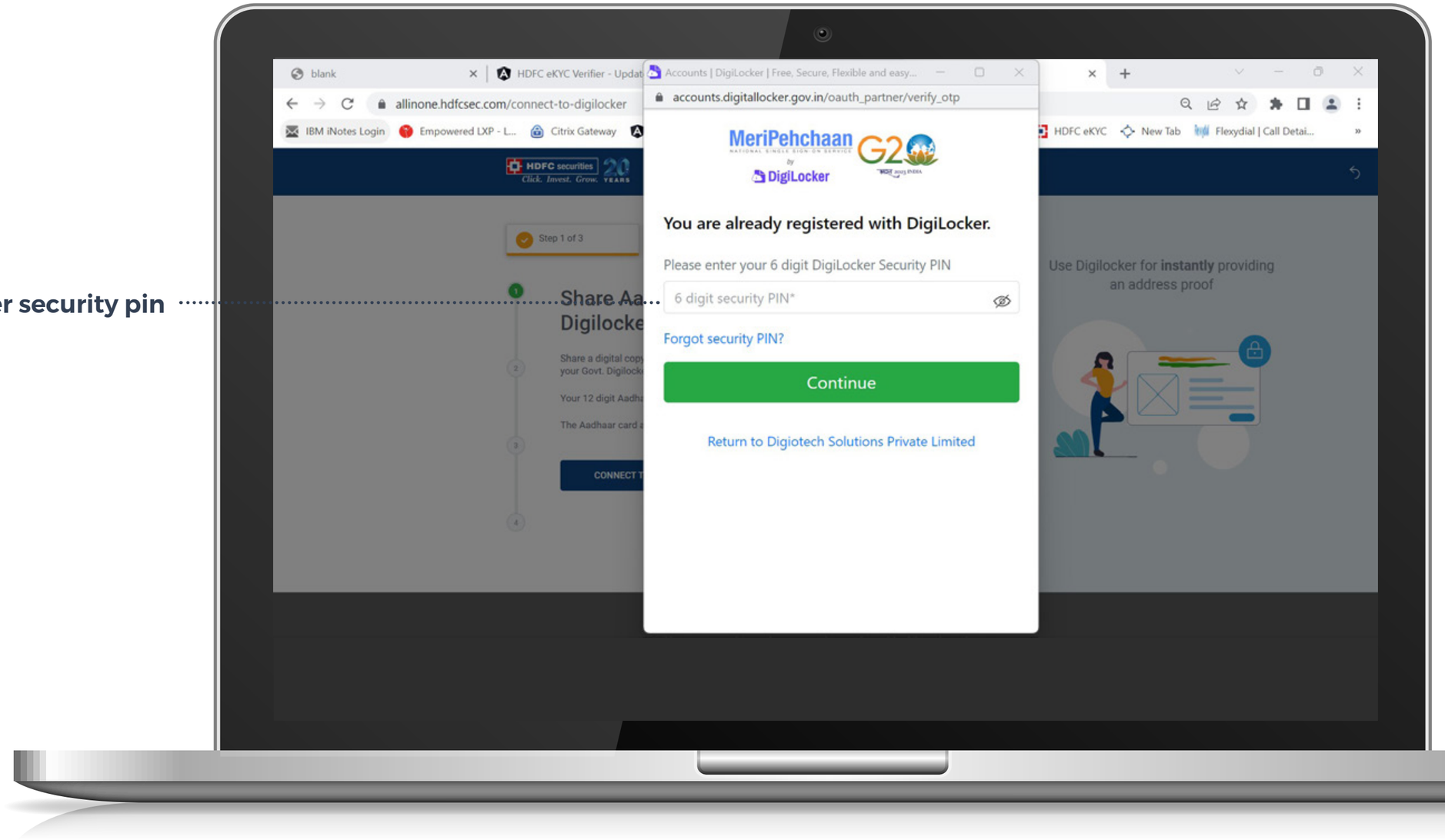
KYC | DIGILOCKER

Enter OTP sent on given mobile number.



Strictly for internal use only.

KYC | DIGILOCKER



Inform the customer to select the “Forget Security Pin” option and create a new pin if they can’t recall their security pin.

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KYC | DIGILOCKER

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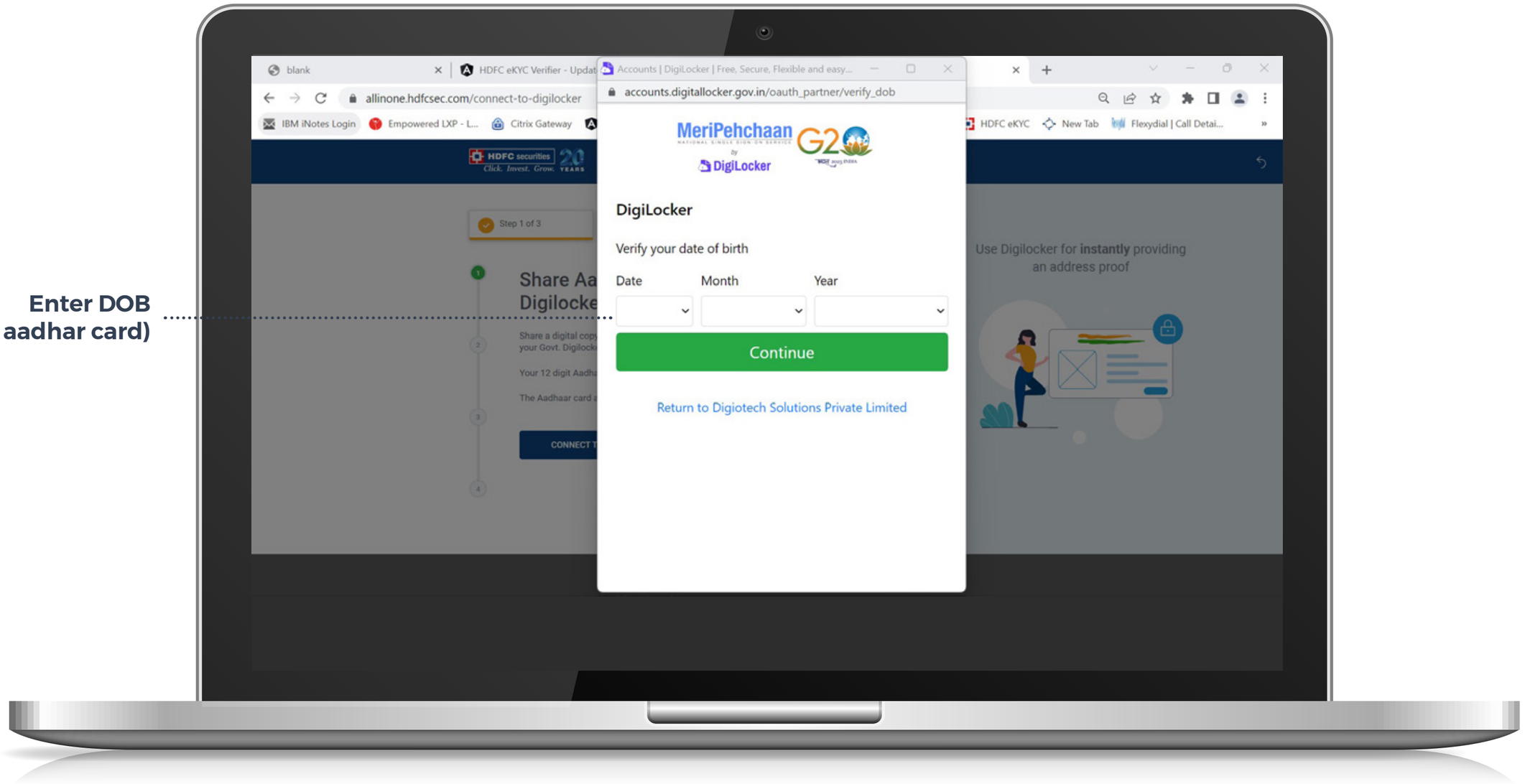
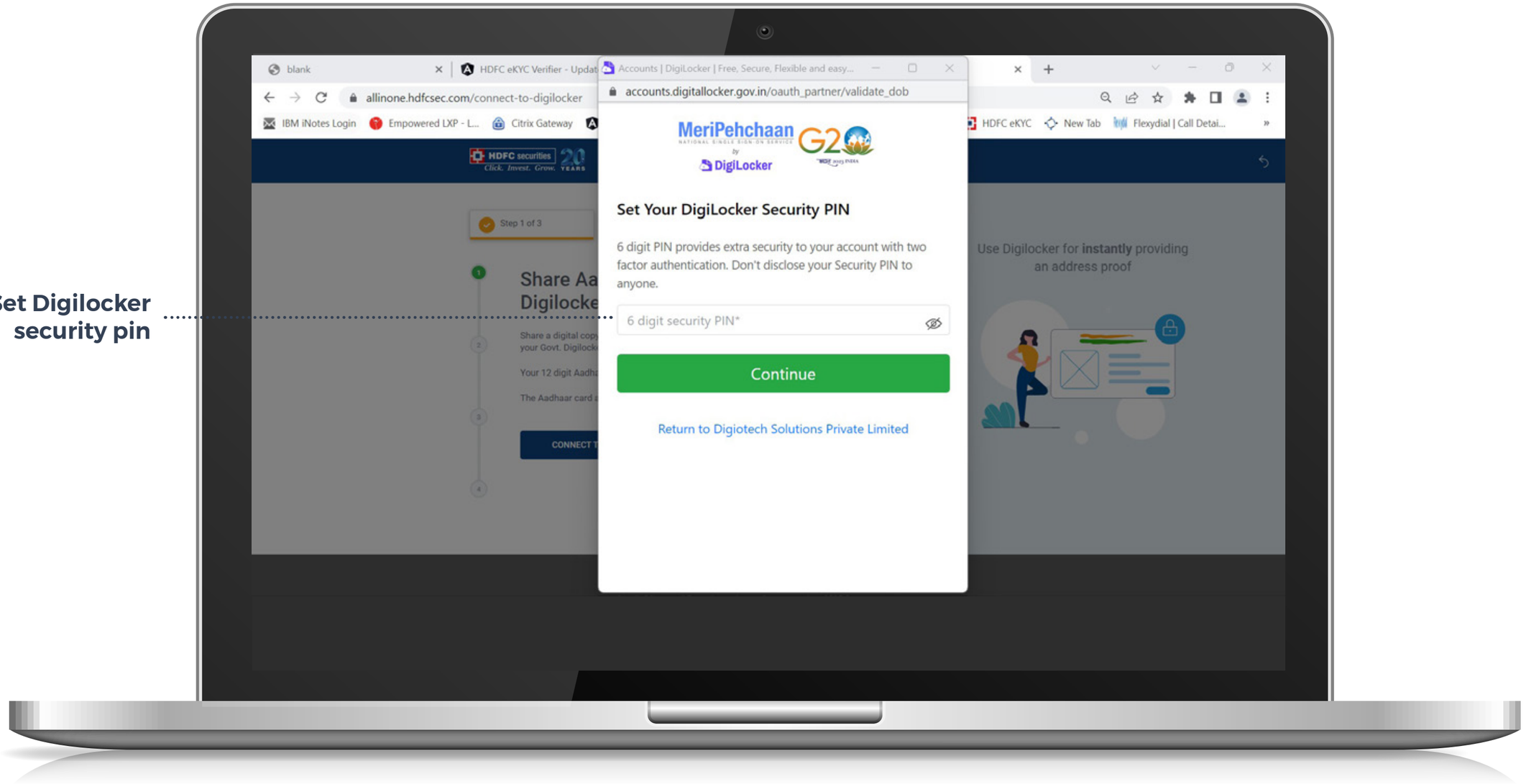
Enter DOB
(as per aadhar card)



Strictly for internal use only.

KYC | DIGILOCKER



Strictly for internal use only.

KYC | DIGILOCKER

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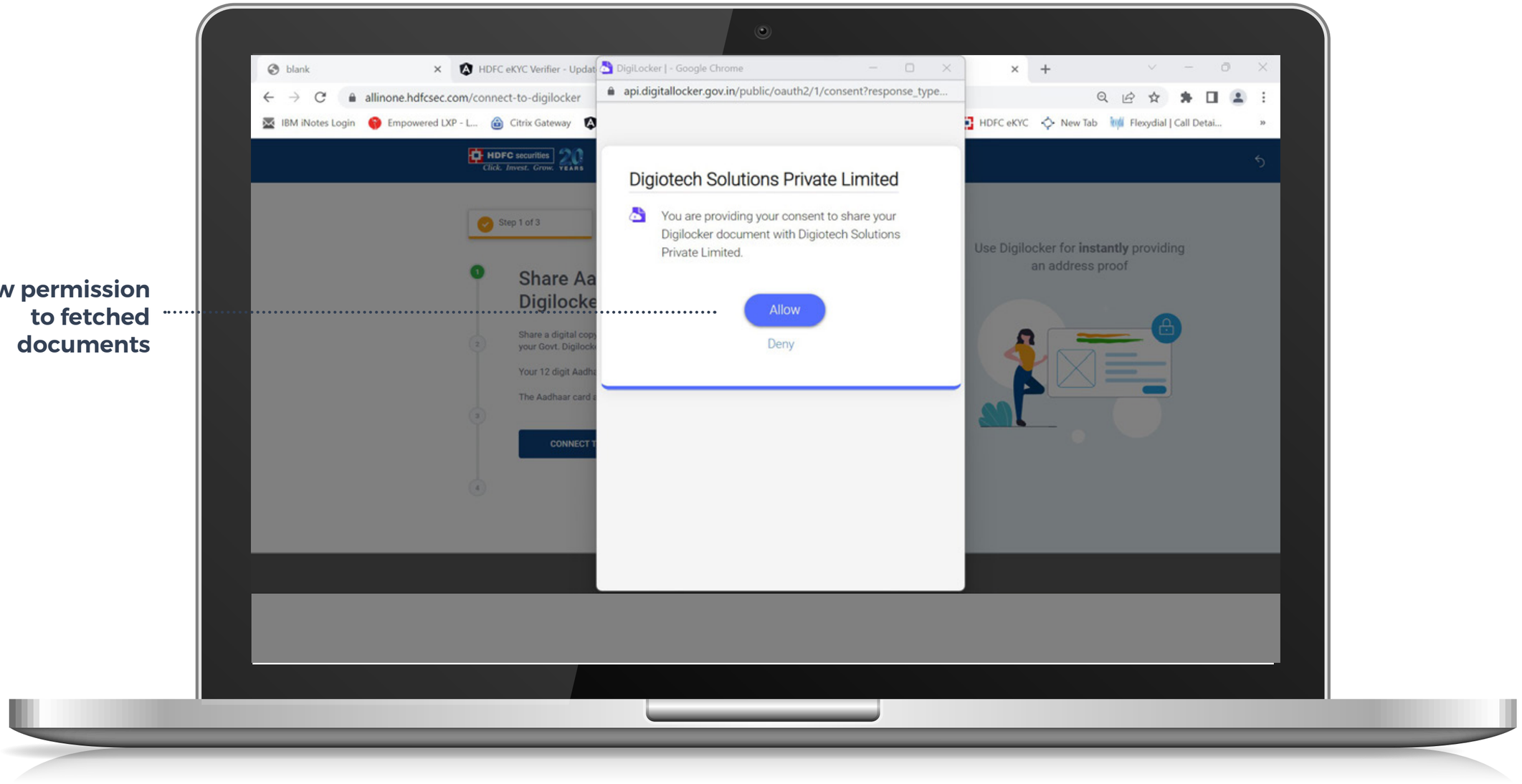
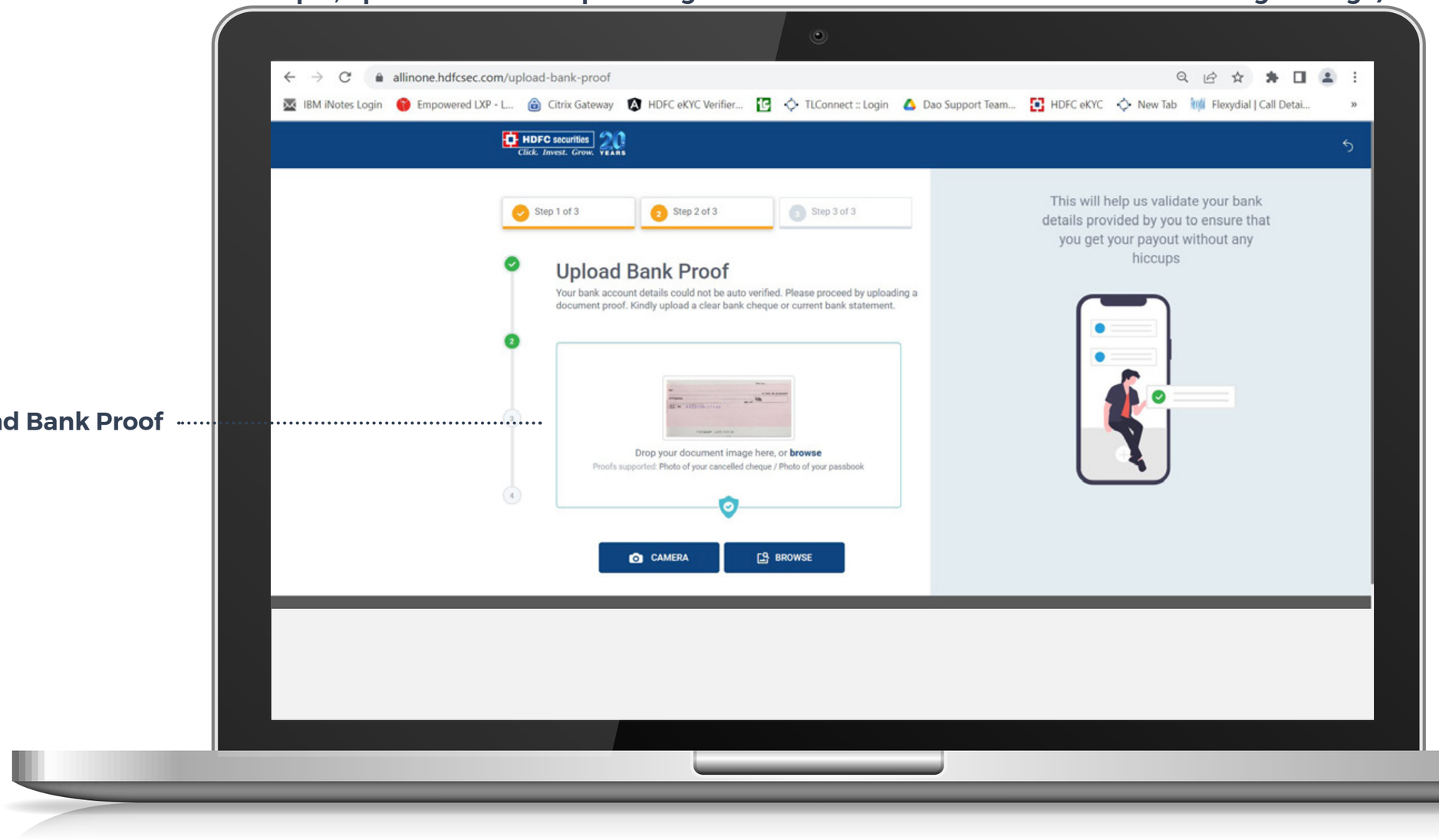
Allow permission to fetched documents



Strictly for internal use only.

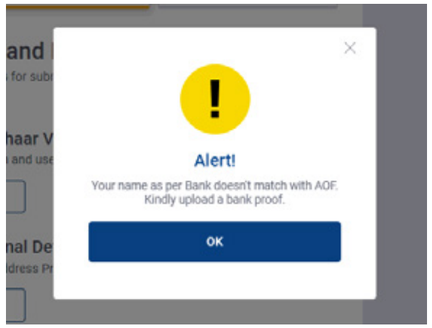
KYC | UPLOAD BANK PROOF

Upload personalized cancel cheque with signature as per bank records (incase of non-personalized cheque, upload cancel cheque along with Bank Statement or Passbook in one Single image)



Upload Bank Proof

Upload Bank Proof only if penny drop has failed/If customer Name doesn't match with AOF



Note: Screenshot is not accepted

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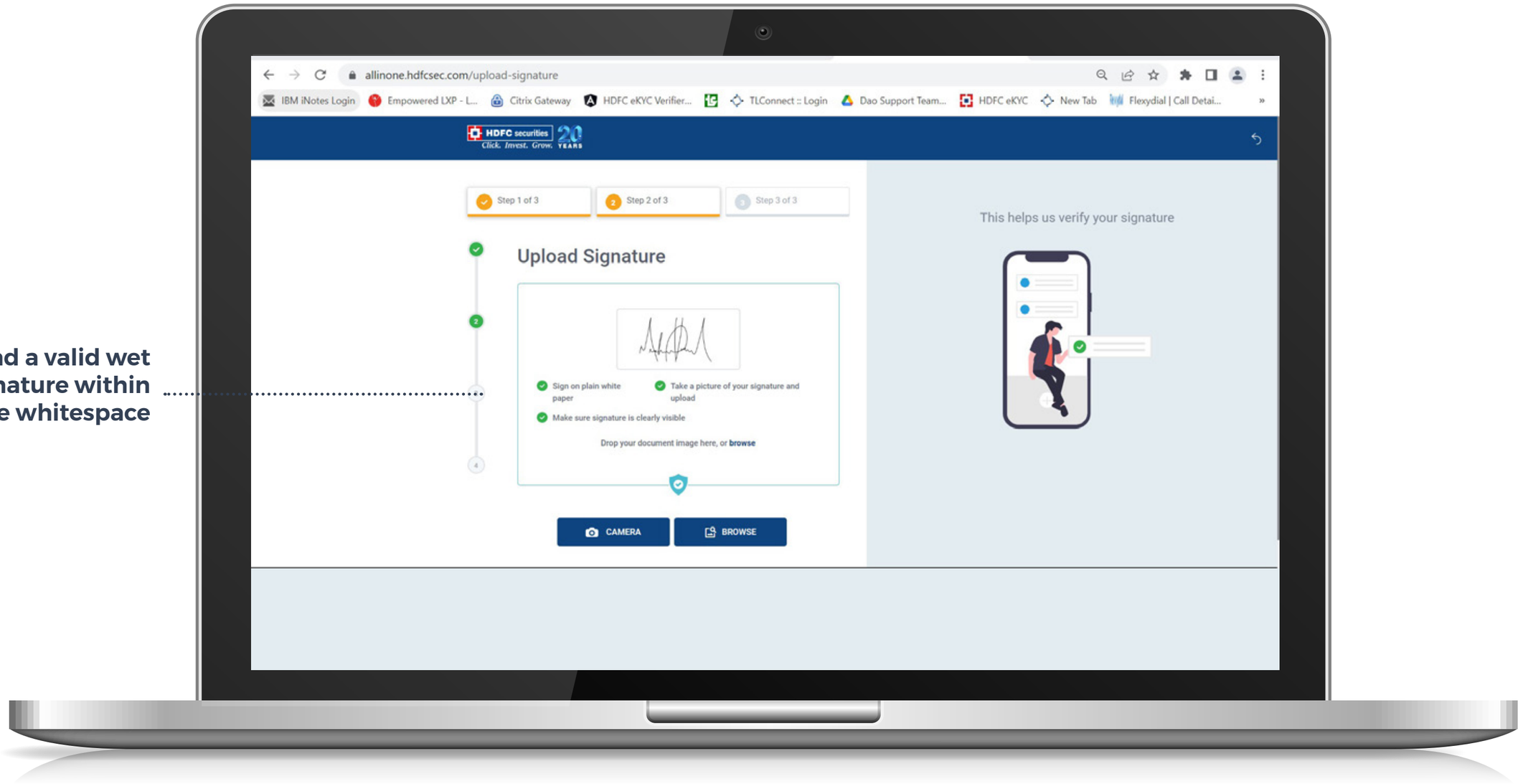
KYC | UPLOAD SIGNATURE



Upload a valid wet signature within the whitespace

Note: Upload signature as per BANK records.(Photo of photo is not accepted)

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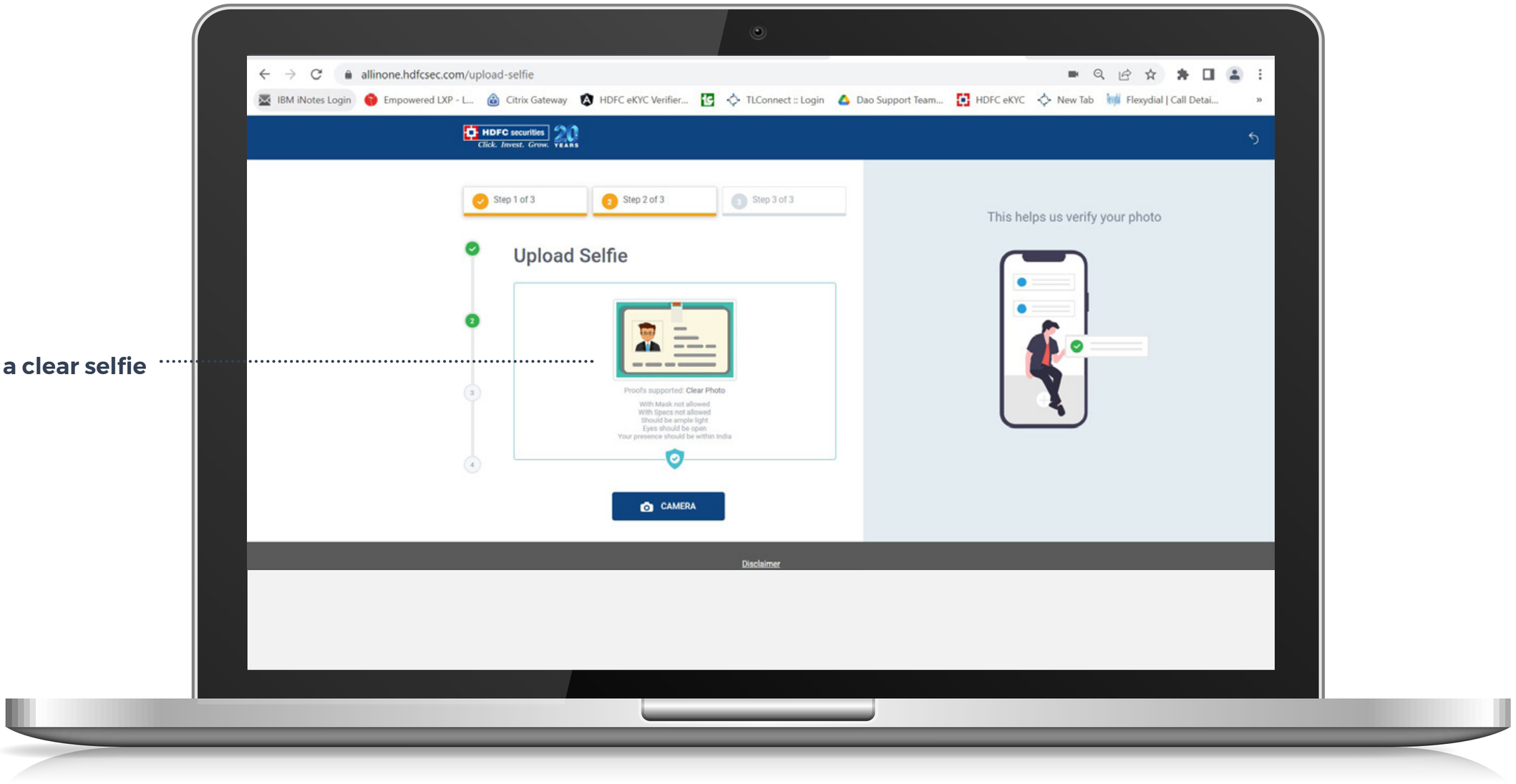
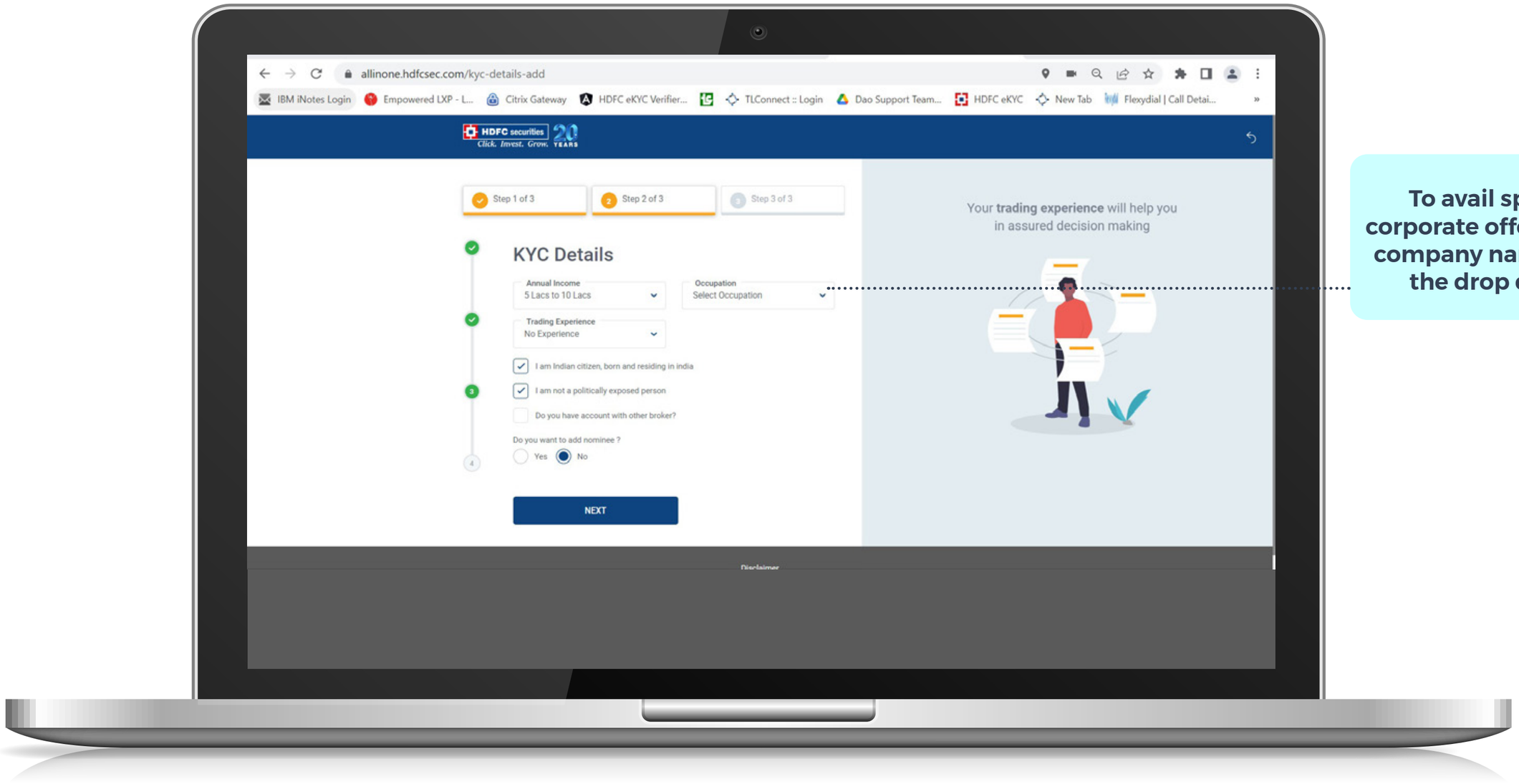
KYC | UPLOAD SELFIE



Upload a clear selfie

Note: Photo of photo is not accepted

KYC | KYC DETAILS



To avail special corporate offers select company name from the drop down

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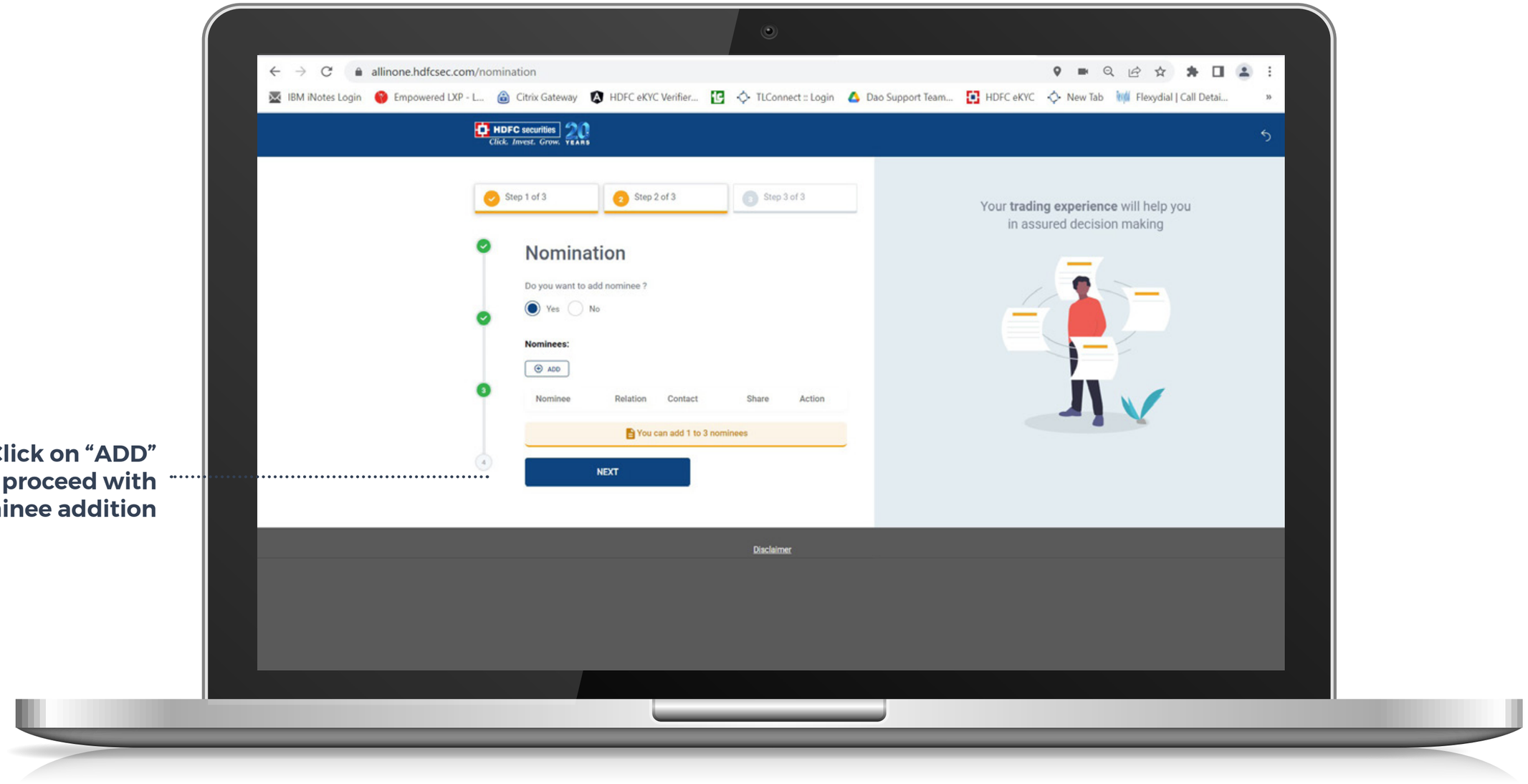
KYC | NOMINEE ADDITION

Incase nomination selected as Yes



Click on “ADD” to proceed with nominee addition

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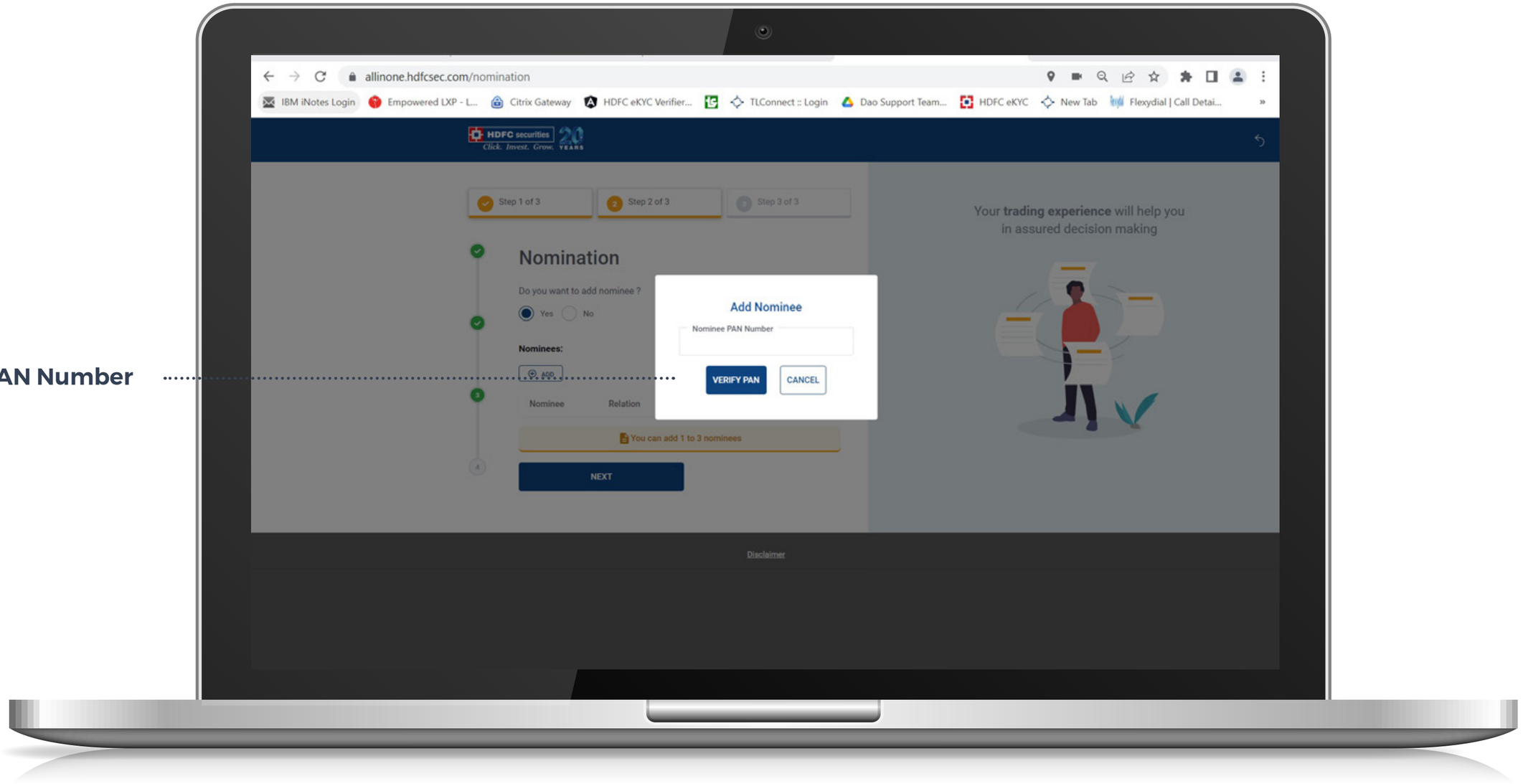
KYC | NOMINEE ADDITION

Incase nomination selected as Yes

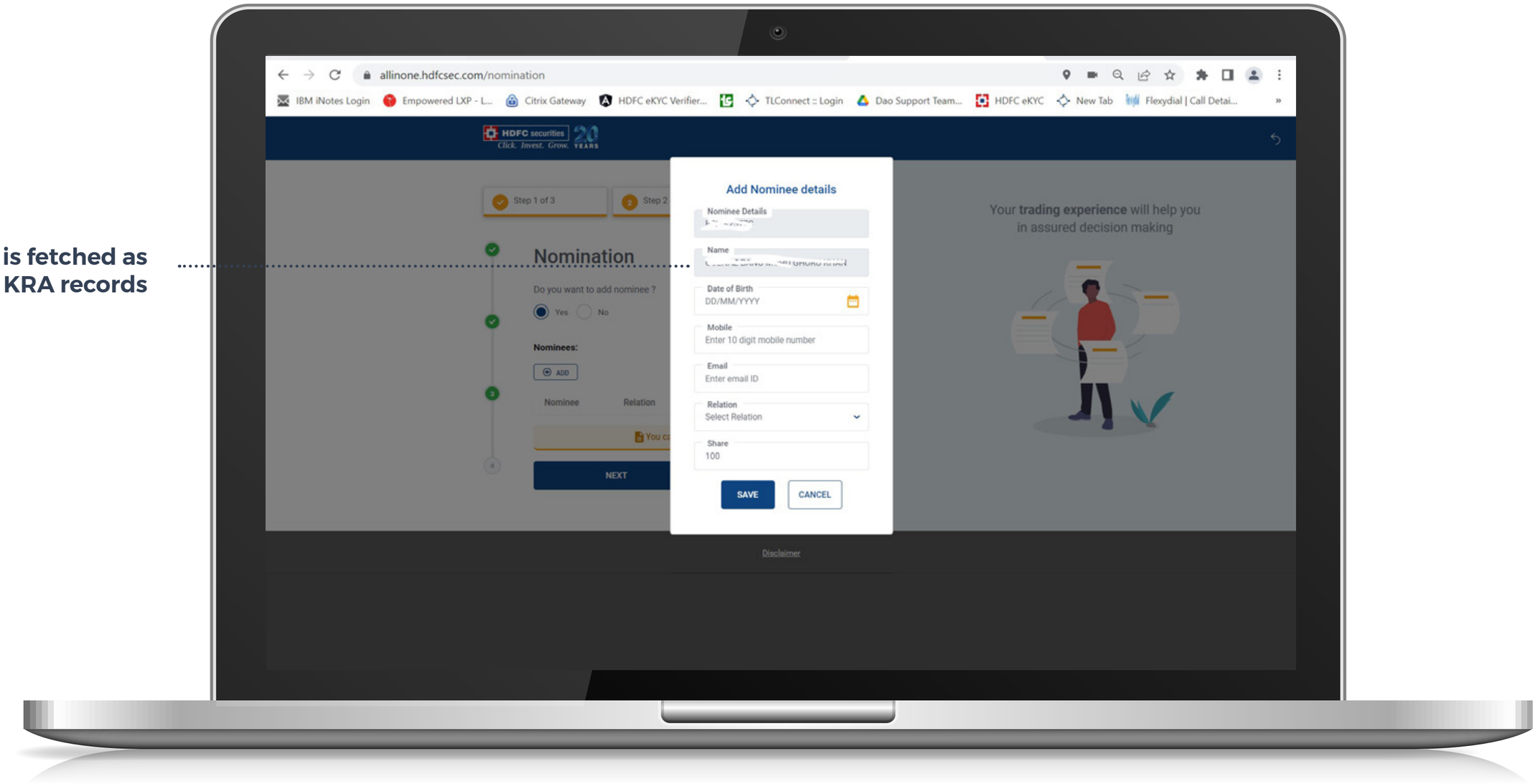
Verify PAN Number



KYC | NOMINEE ADDITION

Incase nomination selected as Yes

Name is fetched as per KRA records



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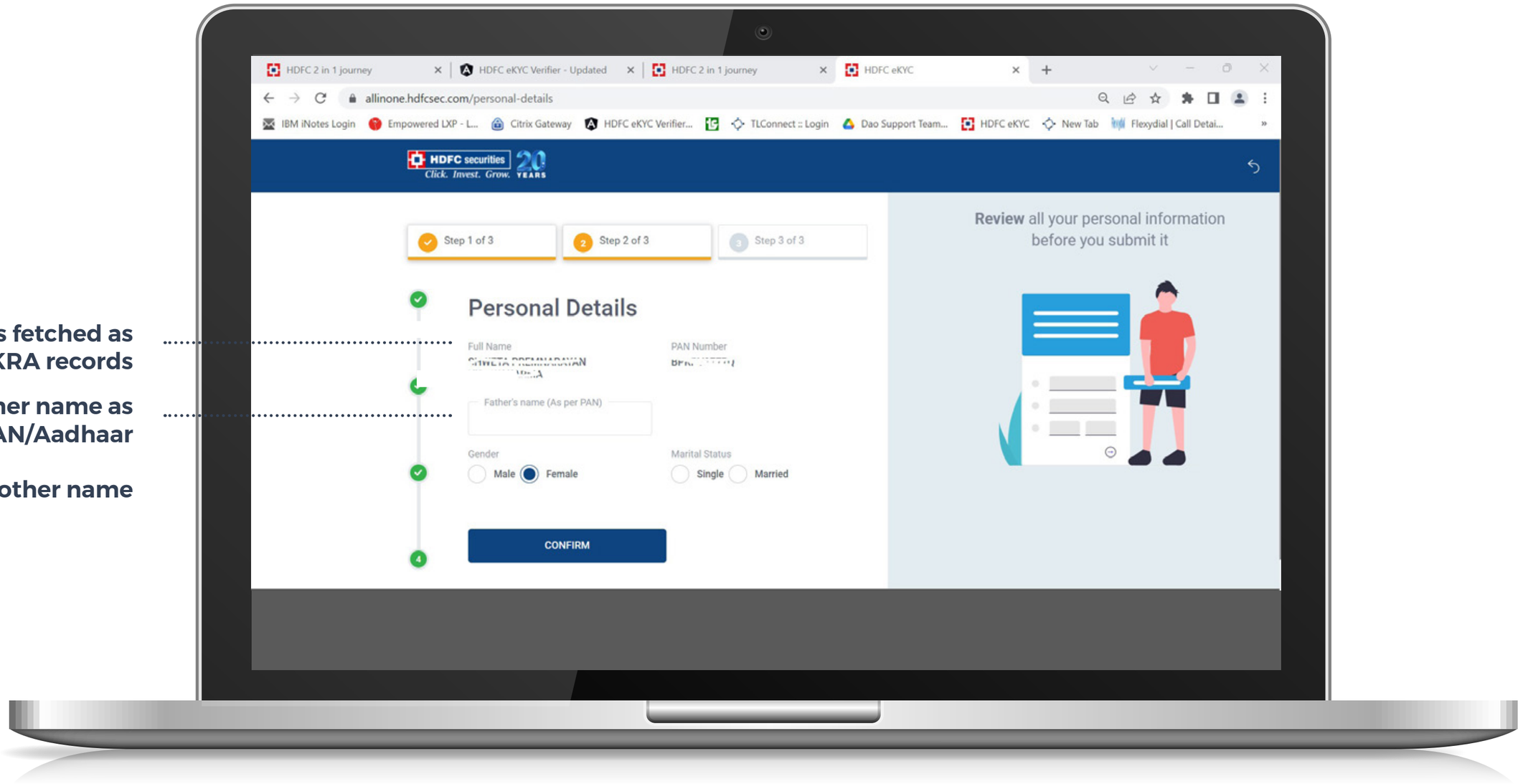
KYC | PERSONAL DETAILS

Name is fetched as per KRA records

Enter Father name as per PAN/Aadhaar

Enter Mother name



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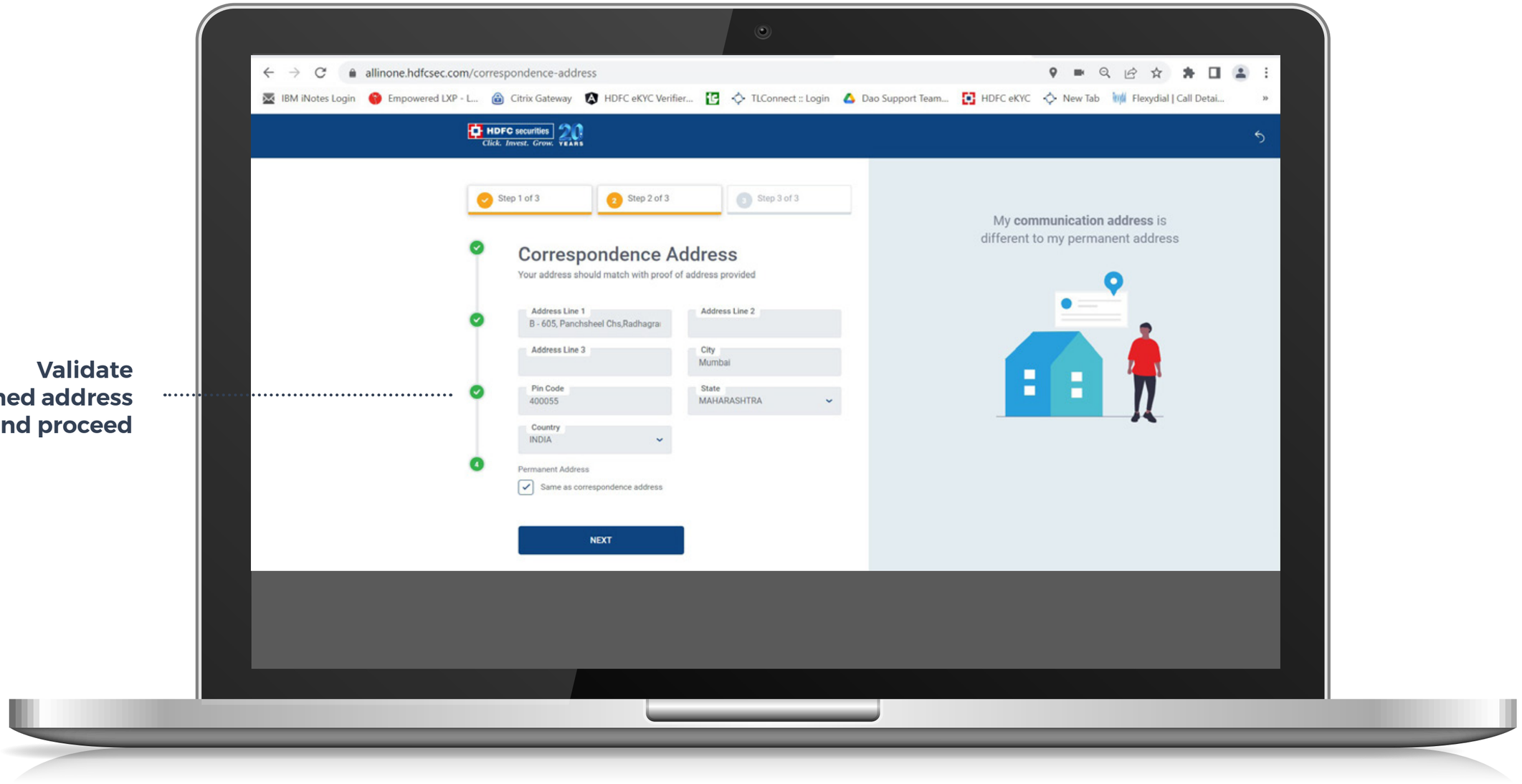
KYC | CORRESPONDENCE ADDRESS



Validate mentioned address and proceed

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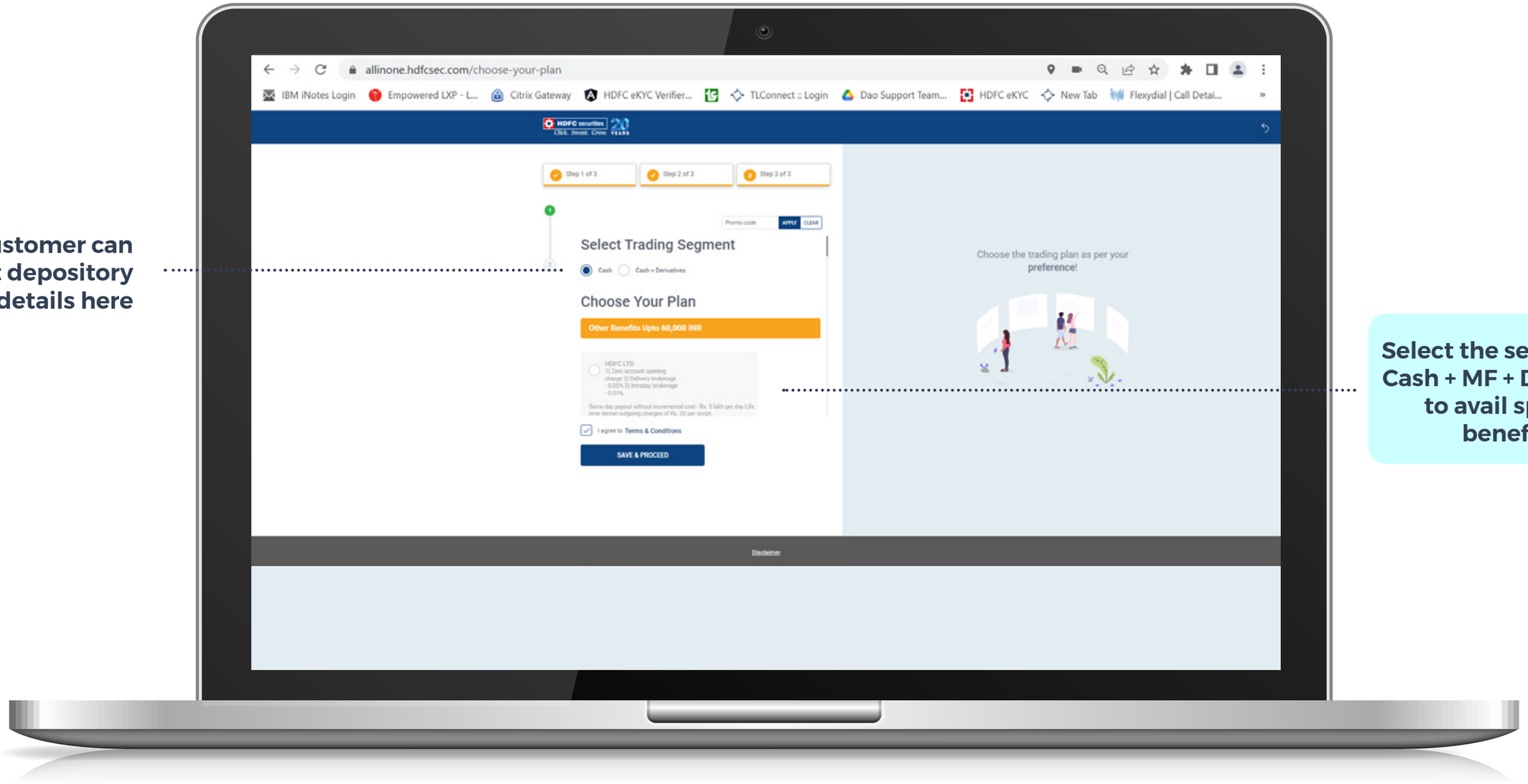
KYC | TRADING SEGMENTS

Based on the company name selected, special offer will be reflected on the plan page.

Customer can select depository details here



Select the segment as Cash + MF + Derivative to avail special benefits

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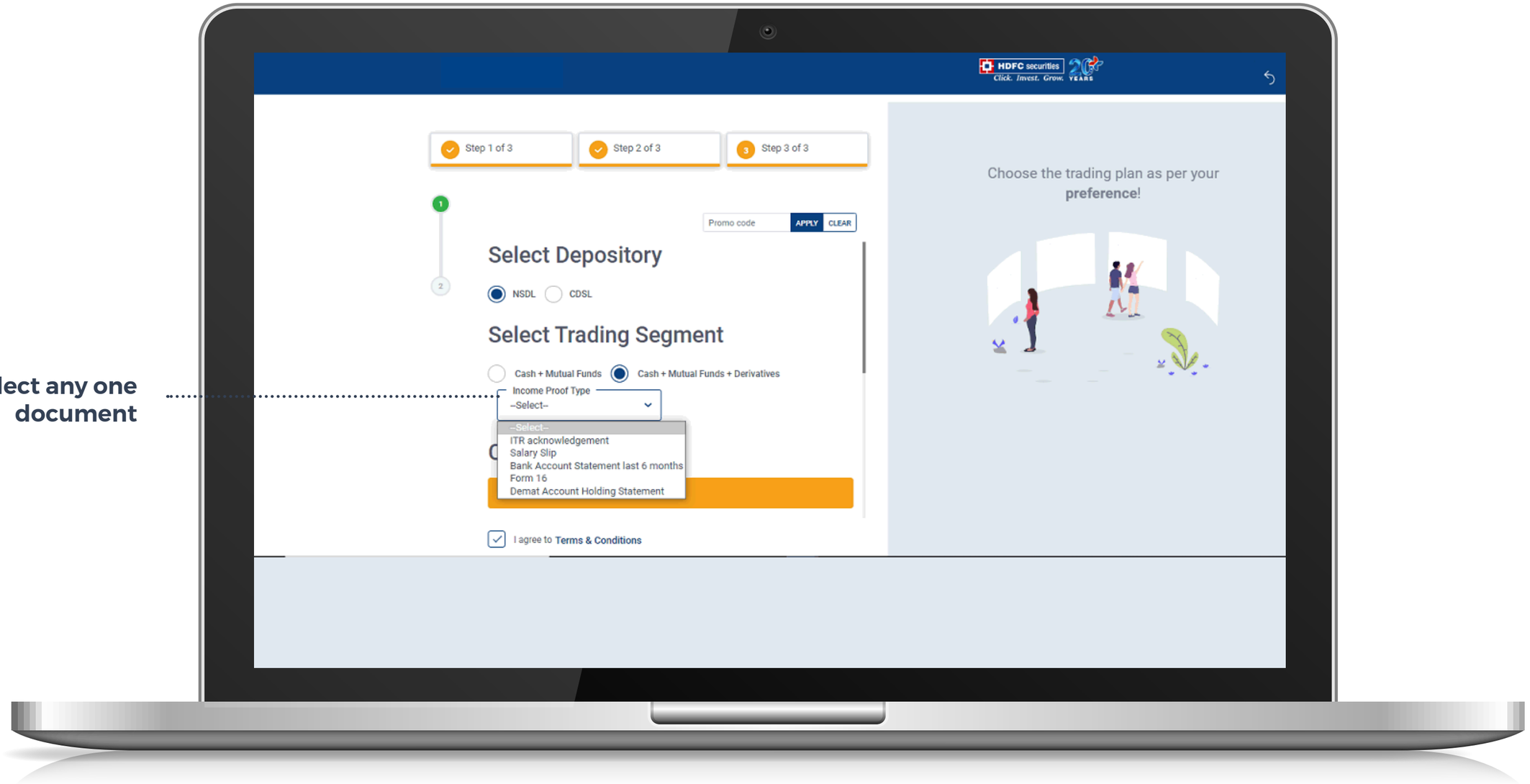
KYC | PLAN SELECTION

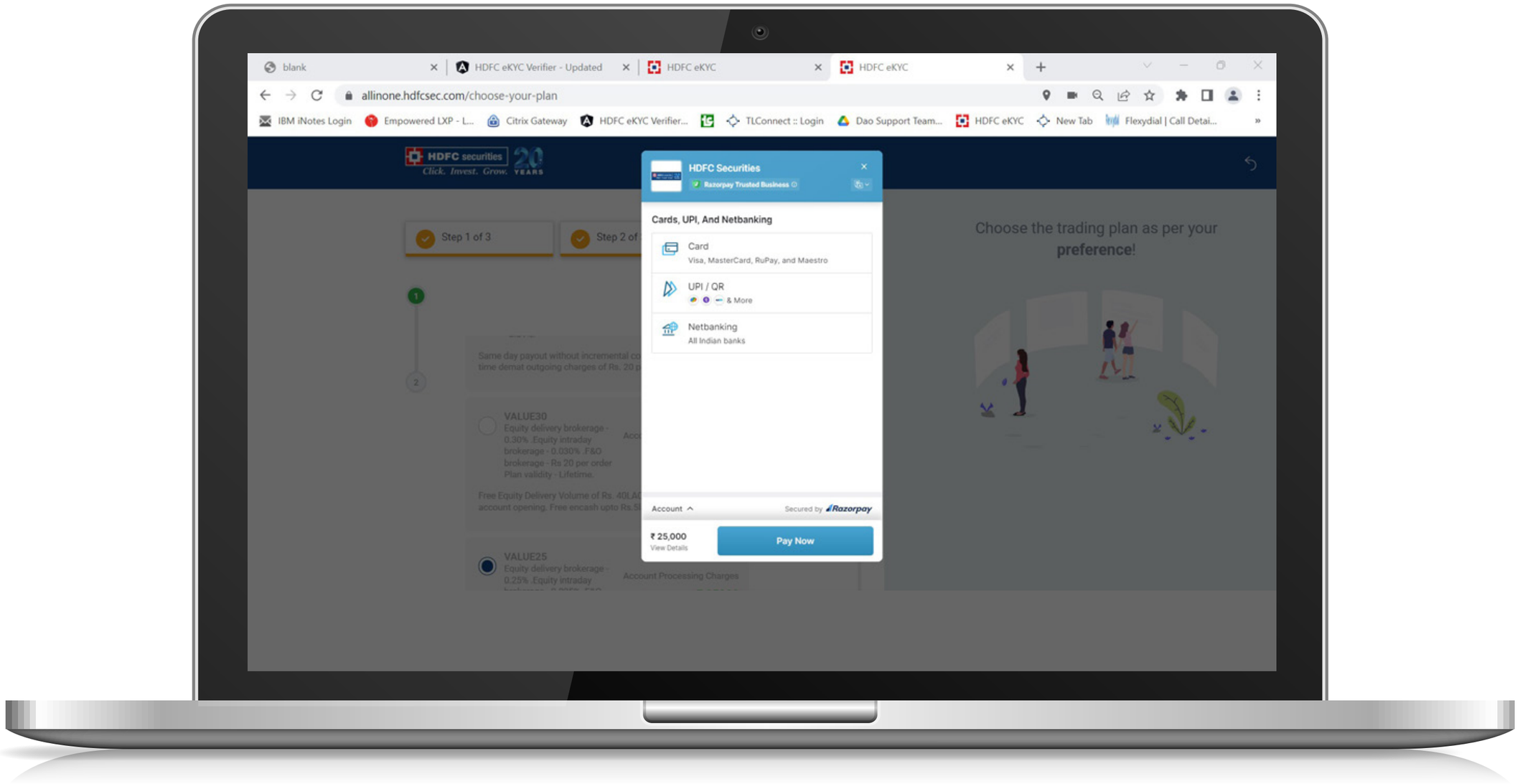
Incase If customer select Derivative plan



Select any one document

Note: Screenshot is not accepted

PAYMENT GATEWAY



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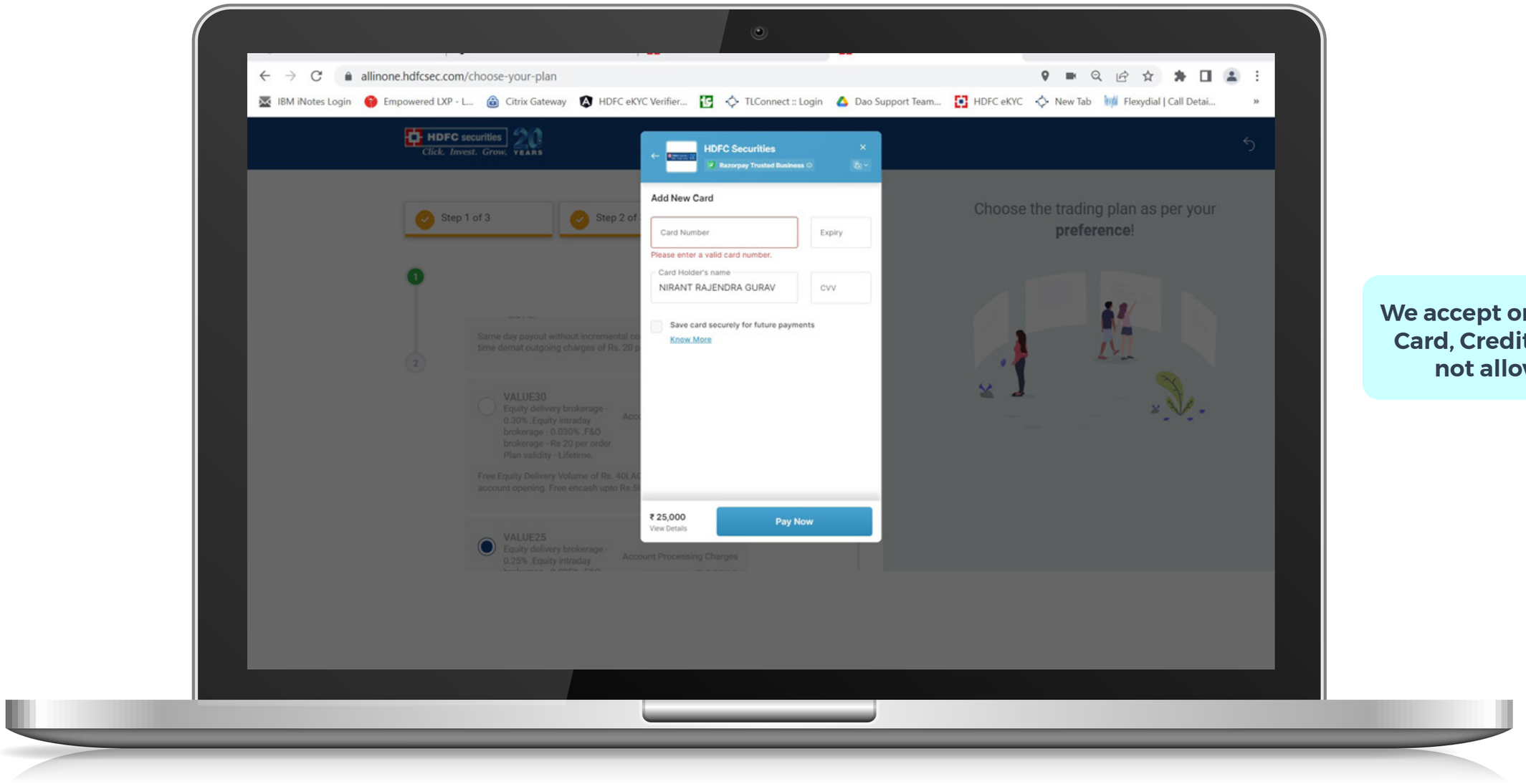
PAYMENT THROUGH DEBIT CARD



We accept only Debit Card, Credit card is not allowed

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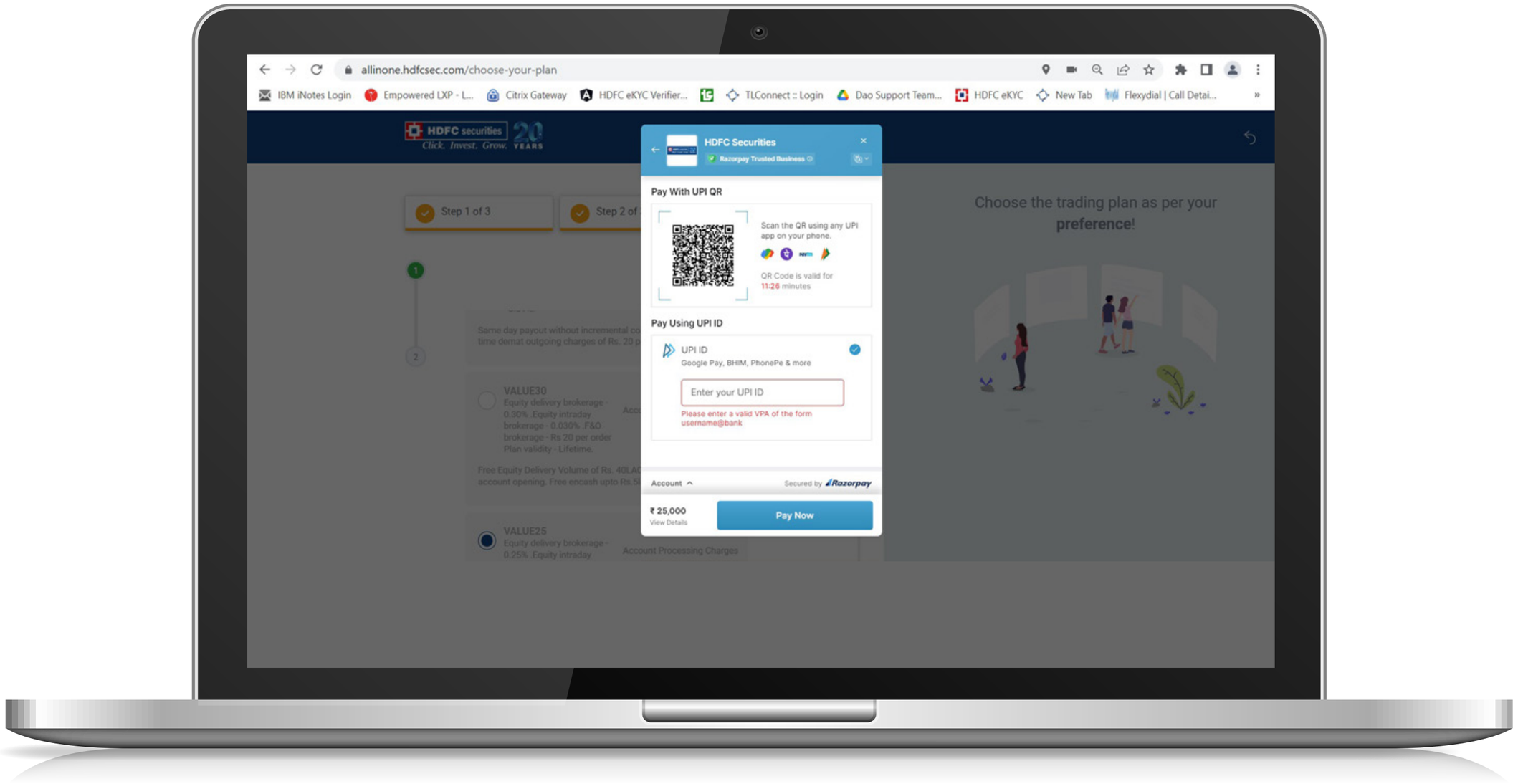
PAYMENT THROUGH UPI



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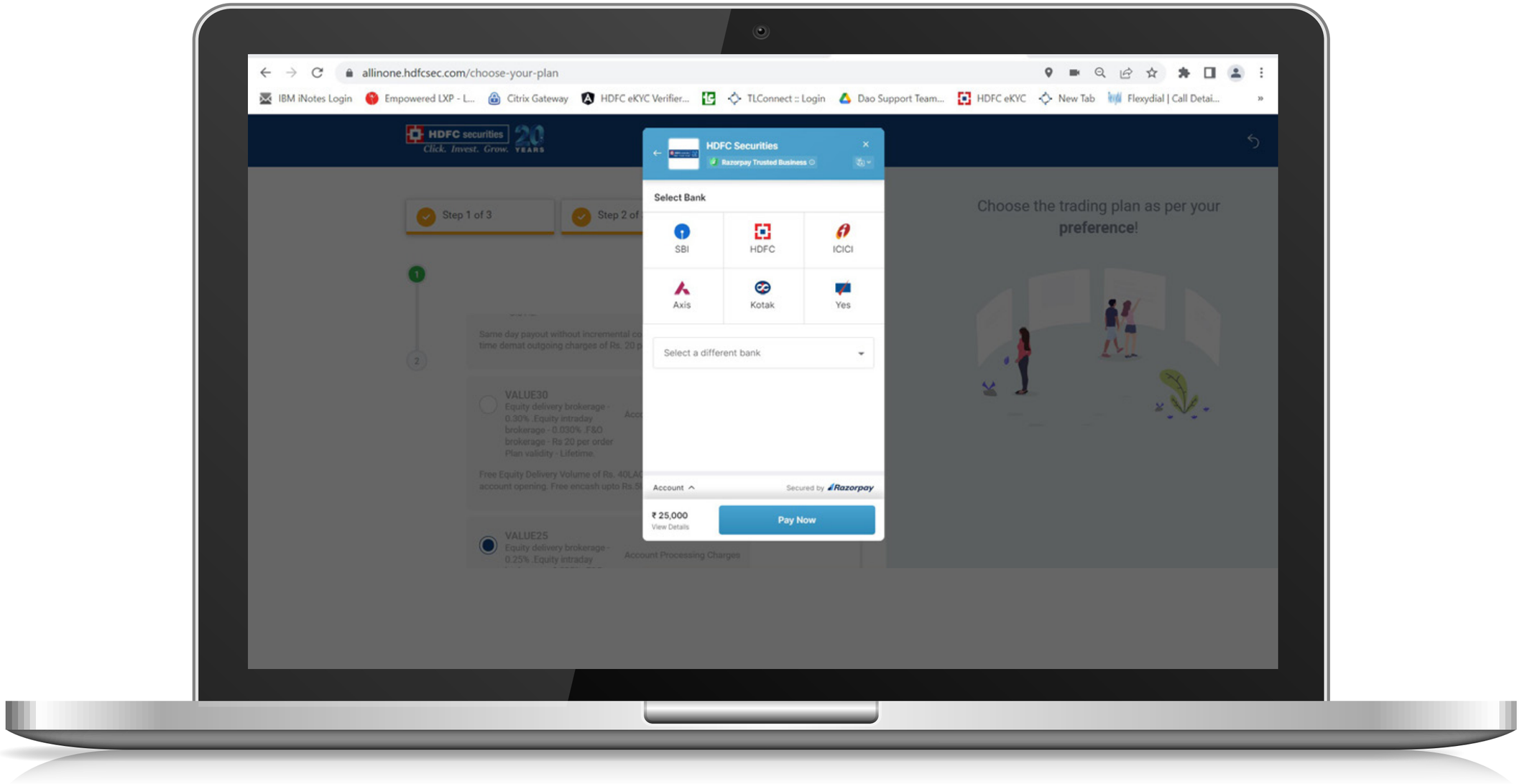
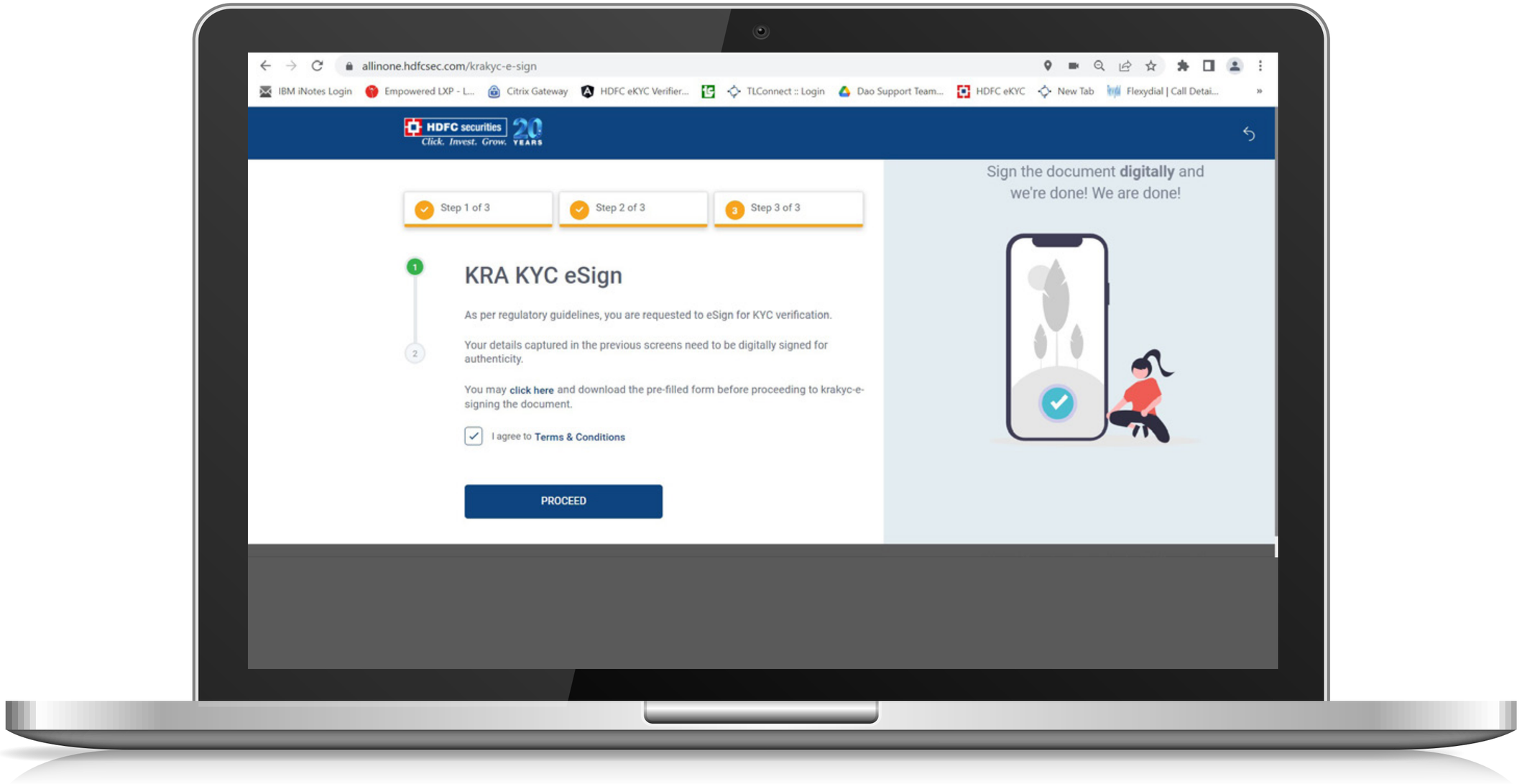
PAYMENT THROUGH NETBANKING



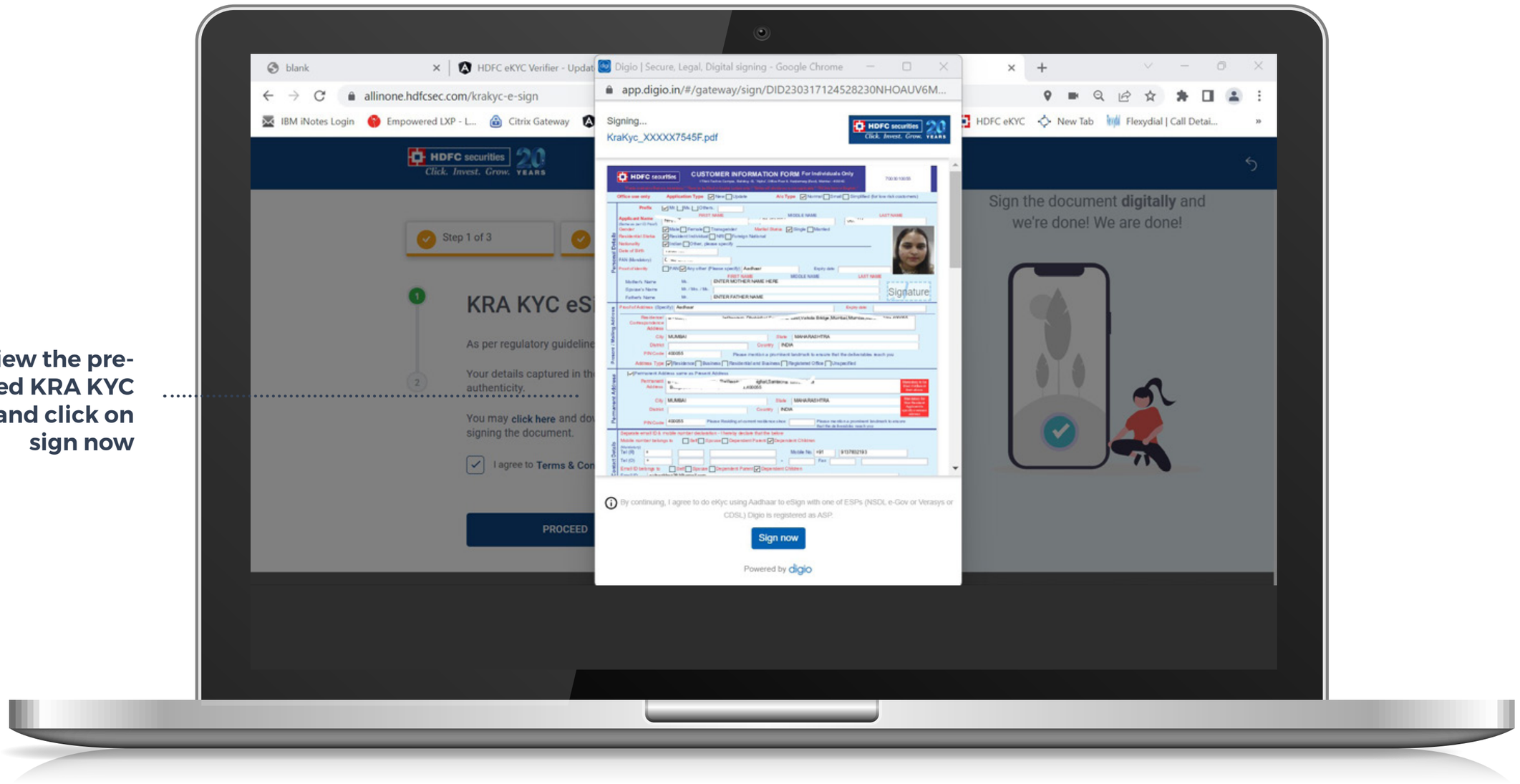
Strictly for internal use only.

KYC | KRA KYC ESIGN



Strictly for internal use only.

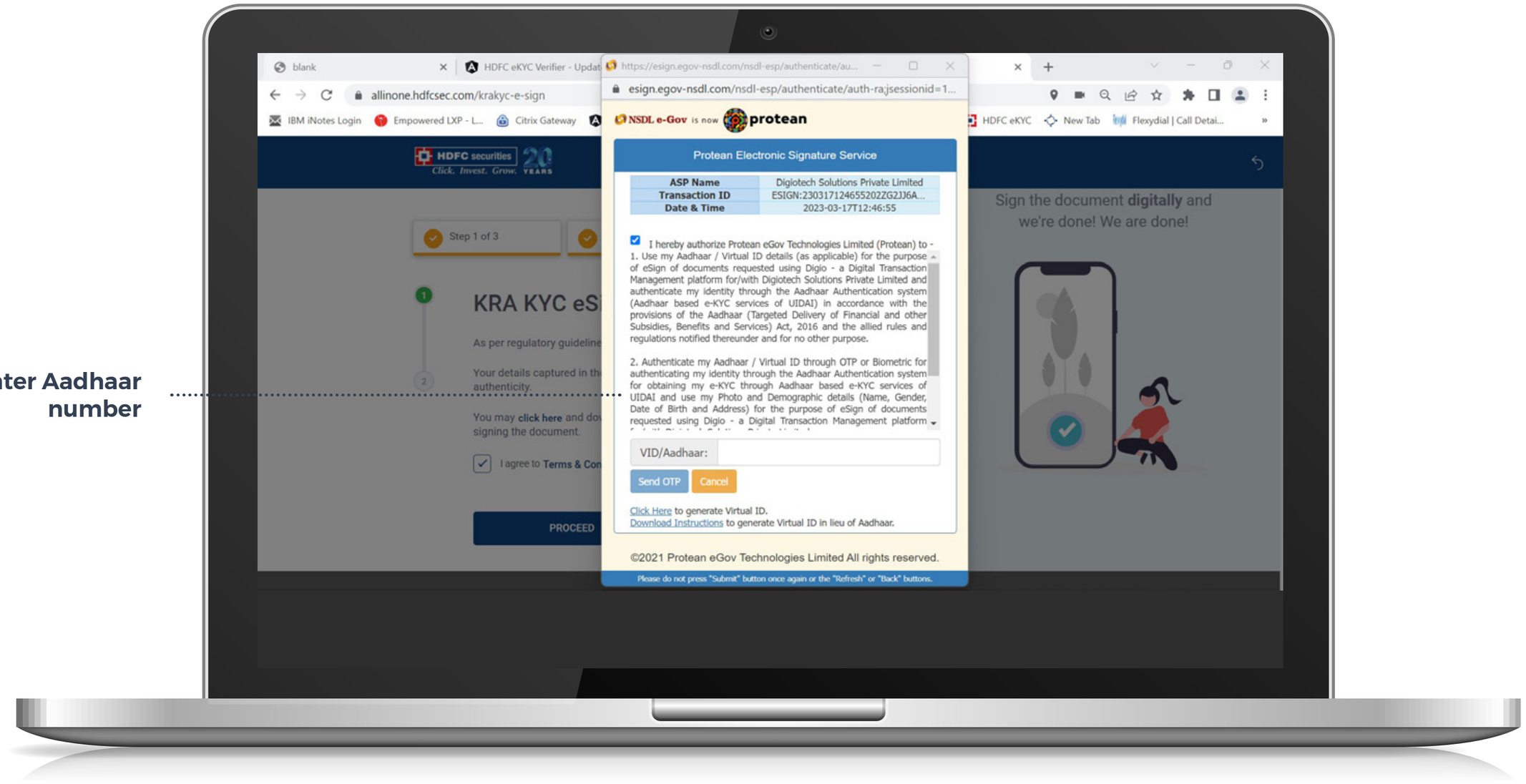
KYC | KRA KYC ESIGN



Preview the pre-signed KRA KYC form and click on sign now

Strictly for internal use only.

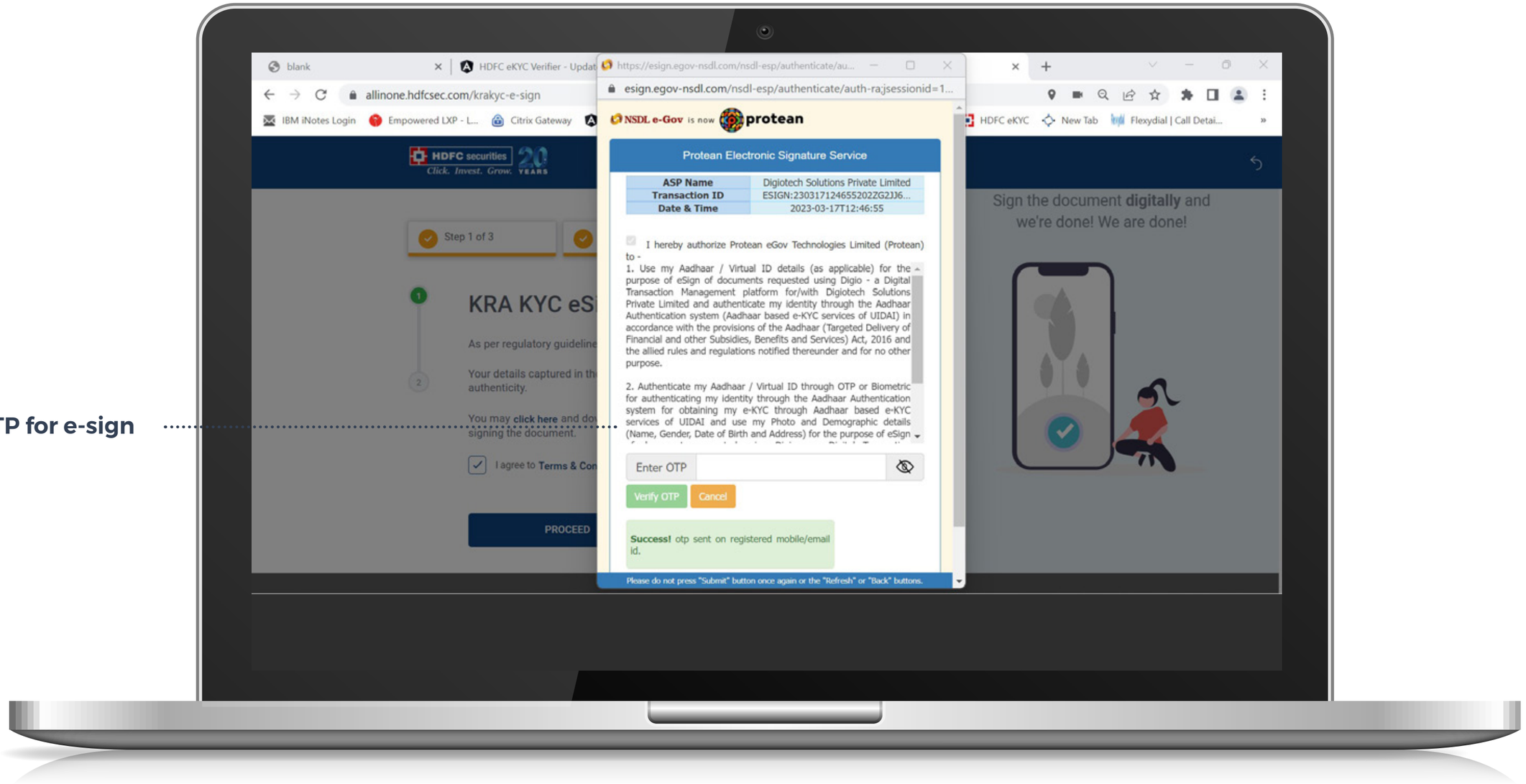
KYC | KRA KYC ESIGN



Strictly for internal use only.

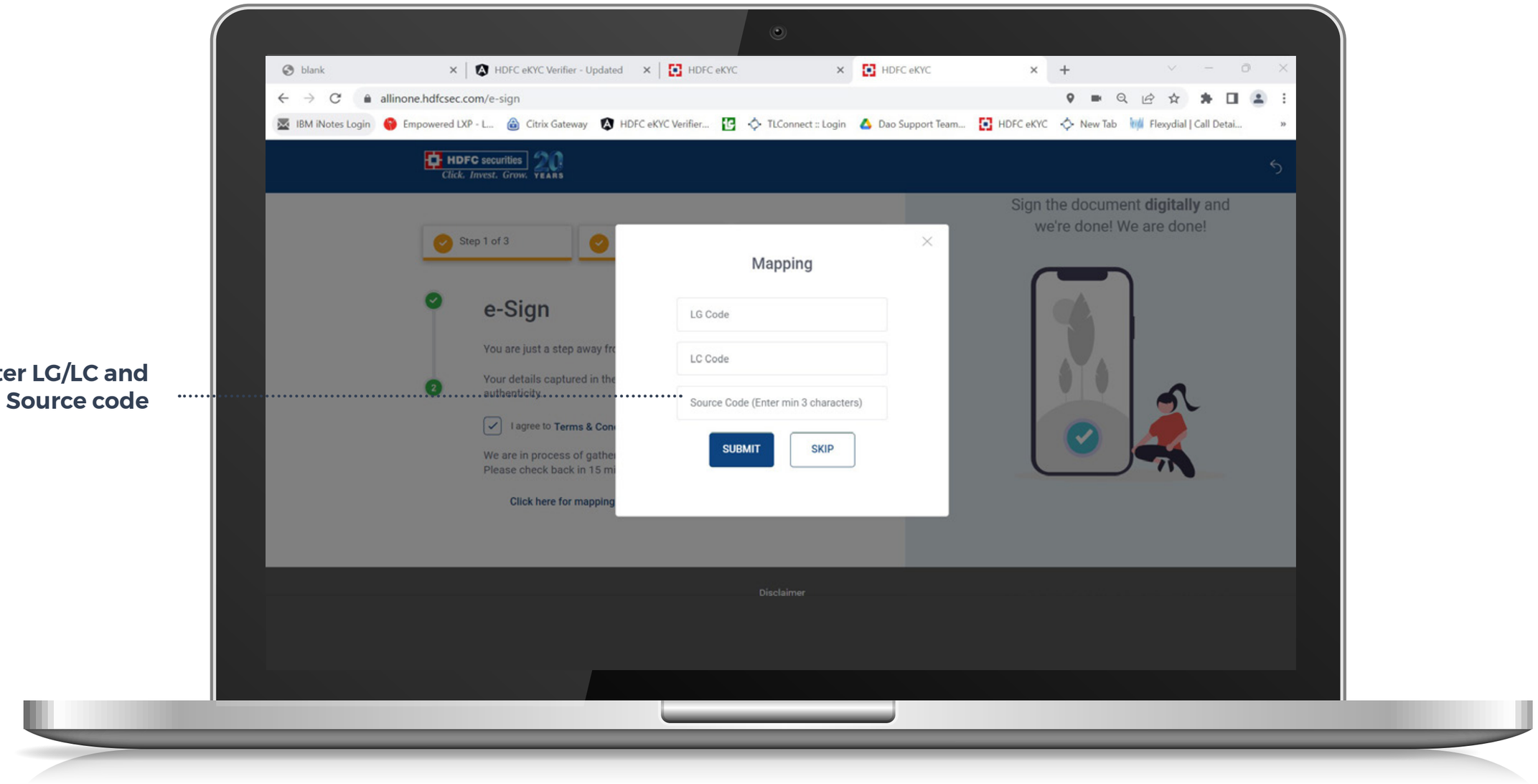
KYC | KRA KYC ESIGN

Enter OTP for e-sign



Strictly for internal use only.

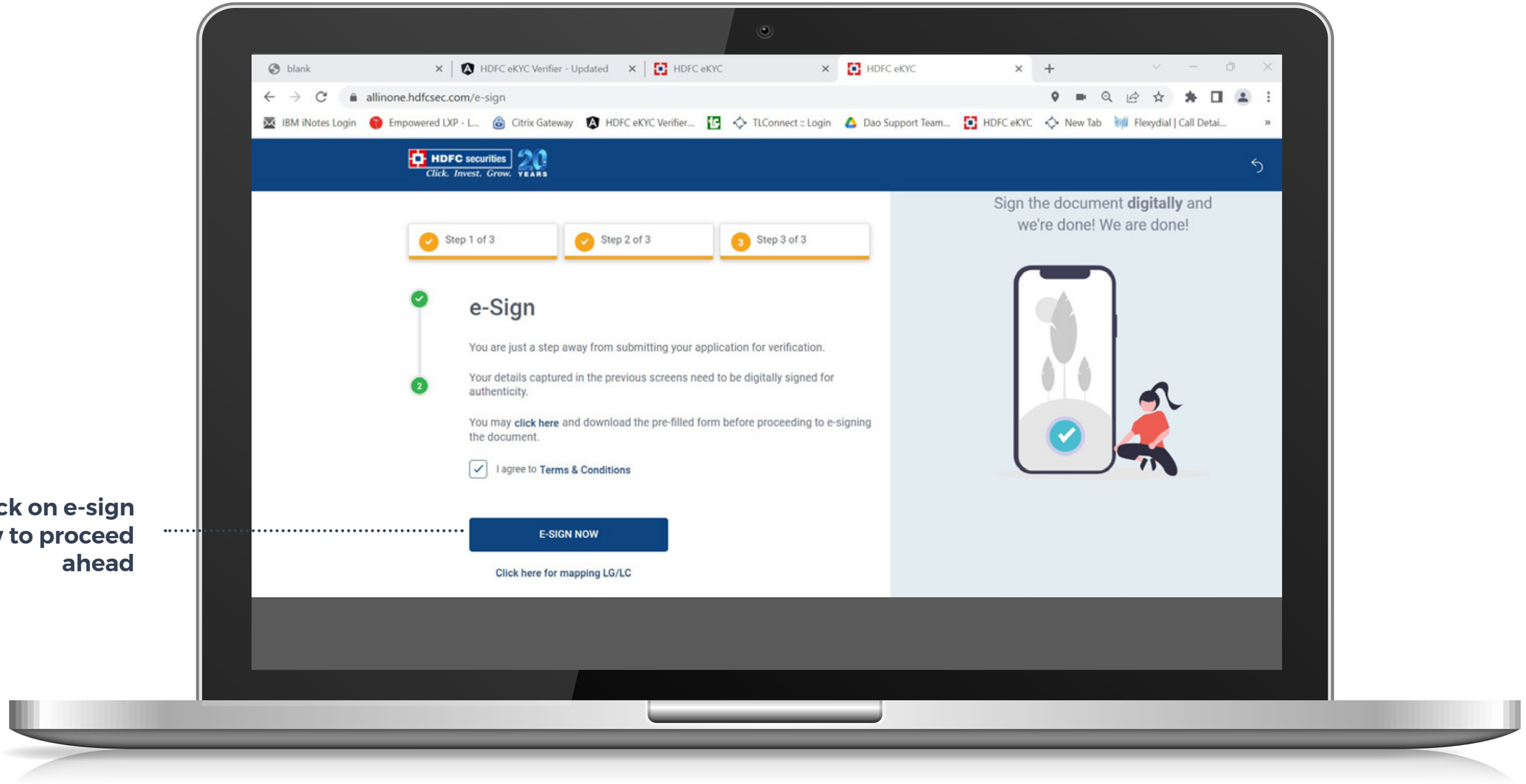
E-SIGN | SUBMIT APPLICATION



Enter LG/LC and Source code

Strictly for internal use only.

E-SIGN | SUBMIT APPLICATION



Click on e-sign now to proceed ahead

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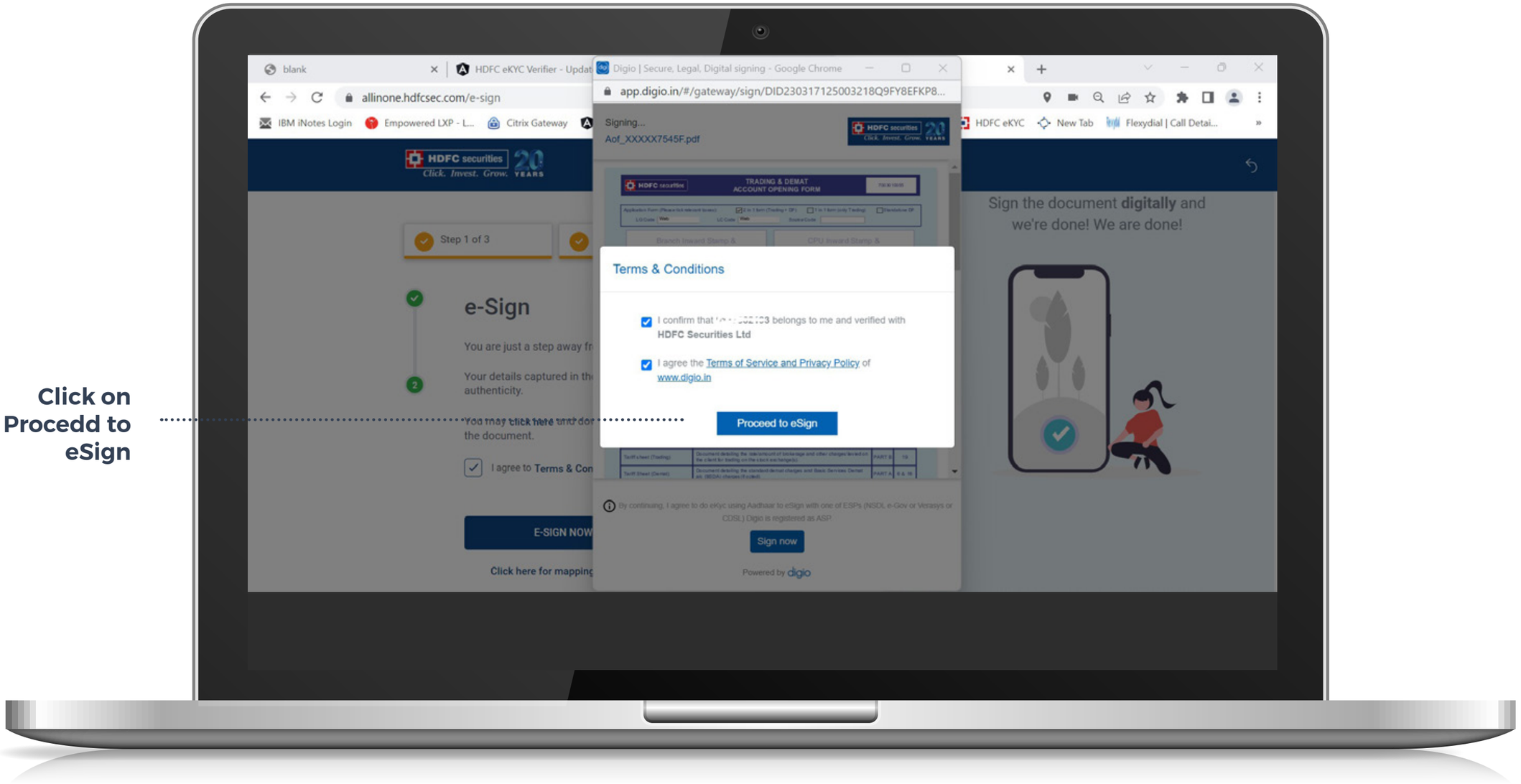
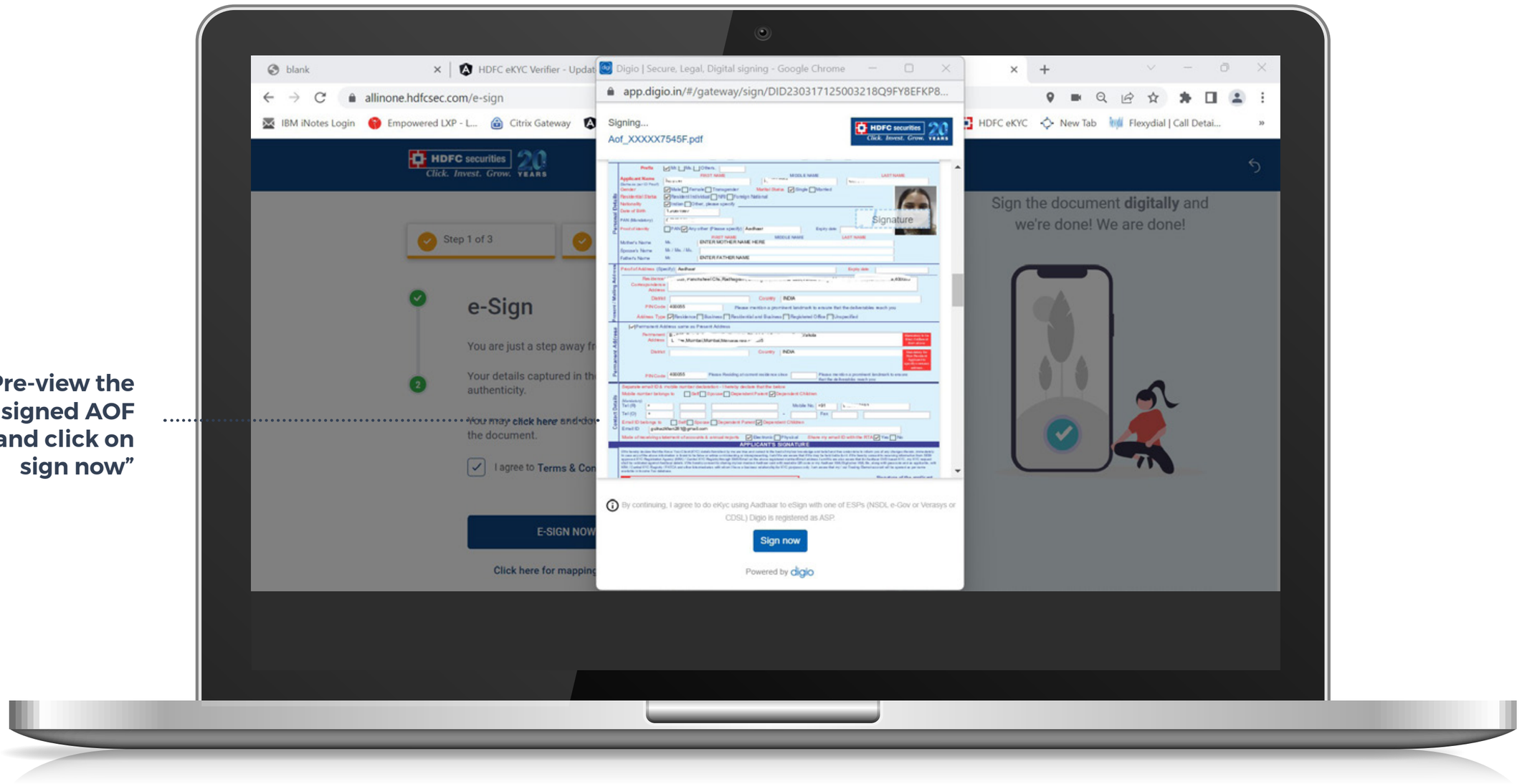
E-SIGN | SUBMIT APPLICATION



Strictly for internal use only.

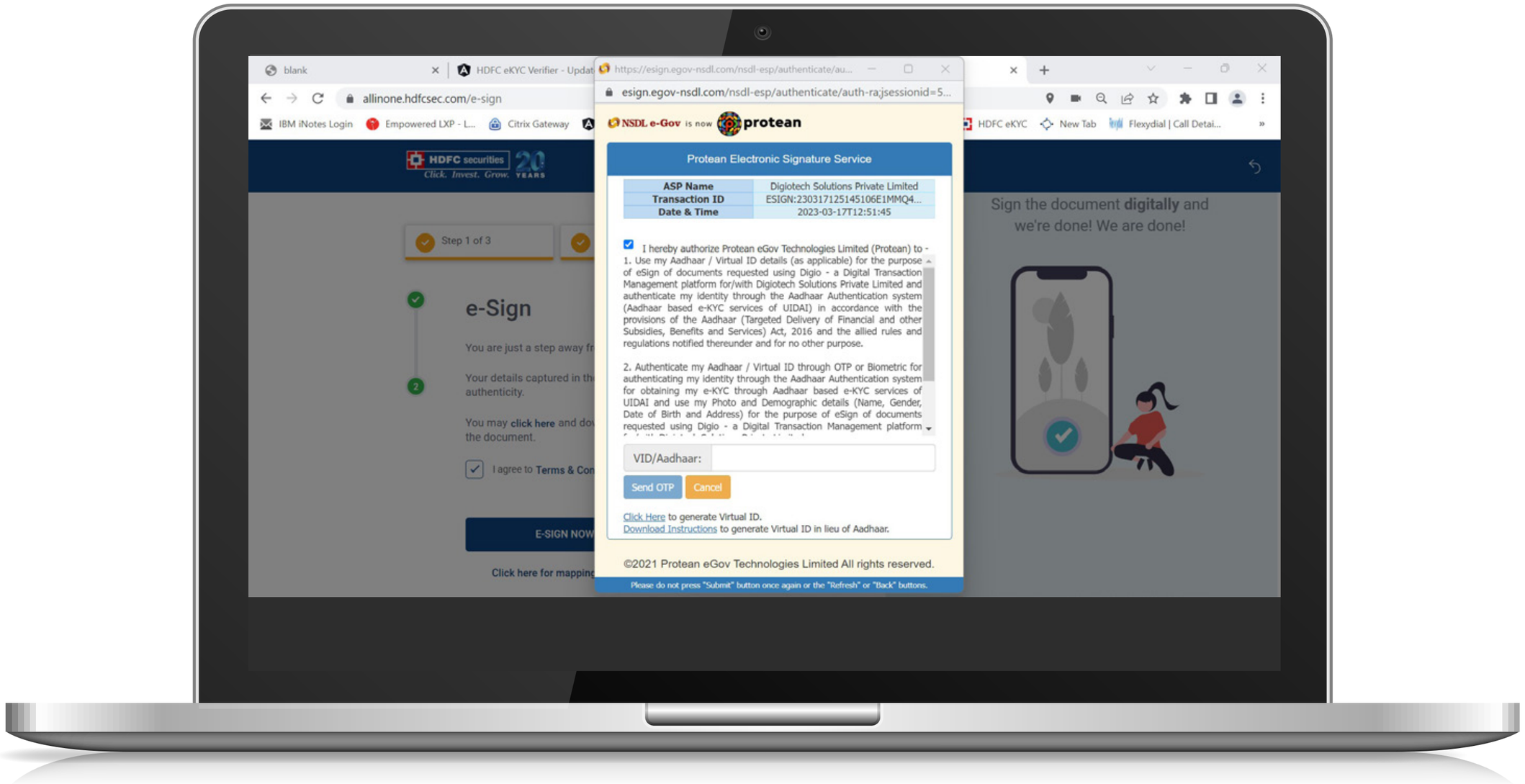
E-SIGN | SUBMIT APPLICATION



Pre-view the pre-signed AOF and click on sign now"

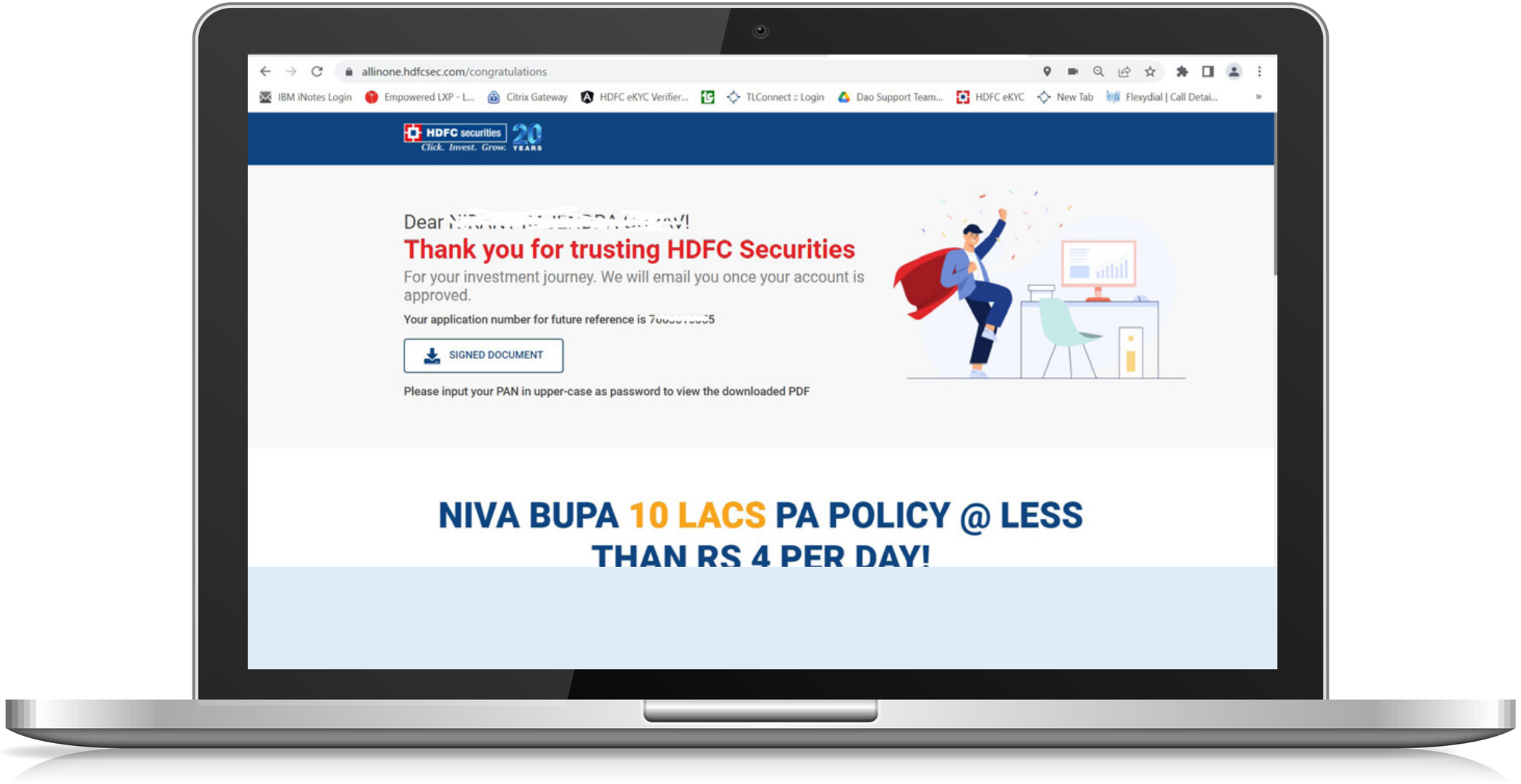
Strictly for internal use only.

E-SIGN | SUBMIT APPLICATION



Strictly for internal use only.

THANK YOU



Strictly for internal use only.

INSTRUCTIONS AFTER SUBMITTING APPLICATION

ACCOUNT GETS ACTIVATED WITHIN 10-15 MINUTES.

CUSTOMERS WILL BE PROVIDED TRADING ACCOUNT DETAILS OVER SMS AND EMAIL.

DULY SIGNED DDPI DOCUMENT SHOULD BE SEND BY THE CUSTOMER FOR SEAMLESS TRADING EXPERIENCE (DDPI SENT TO CUSTOMER REGISTERED MAIL ADDRESS AFTER ACCOUNT OPENING)

IF THE ACCOUNT IS REJECTED DUE TO ANY REASON, THE LINK TO RECTIFY AND RE-SUBMIT APPLICATION WILL BE SENT OVER EMAIL AND SMS ALONG WITH THE REJECTION REASON.

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THANK YOU!

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