

Digital Onboarding & Transactions

TYM FINANCIAL SERVICES PVT. LTD.

AMFI REGISTERED MUTUAL FUND DISTRIBUTOR



Problems Faced during Manual Form filling and transactions

➤ Time-Consuming

- ❖ Filling out paper forms and conducting manual transactions is often a time-consuming process. It requires individuals to physically fill in details, sign documents, and submit them in person or through the mail. This can lead to delays, especially if multiple forms or transactions are involved.

➤ Errors and Inaccuracies

- ❖ Manual data entry is prone to errors. Individuals may make mistakes while writing or transcribing information, leading to inaccuracies in the forms or transactions. These errors can have serious consequences, especially in financial or legal documents.

➤ Limited Accessibility

- ❖ Manual forms and transactions are often constrained by location and working hours. People need to physically visit offices or banks during business hours, which can be inconvenient and may not align with their schedules.

➤ Processing Delays

- ❖ Manual processes are subject to human intervention at multiple stages. This can lead to delays in processing and approval, causing frustration and inconvenience to individuals who need timely transactions.

➤ Lack of Tracking

- ❖ Manual transactions often lack effective tracking mechanisms. This can make it difficult to monitor the status of a transaction or to trace errors or discrepancies back to their source.

➤ Inefficiency

- ❖ Manual processes can be inefficient and result in redundant tasks. For example, individuals may need to fill out the same information multiple times for different forms or transactions.

Benefits of Using Digital Platform for Investment

- One time investor registration (Investor Identification Number) on the platform.
- Downloads prefilled forms for ease of transaction.
- Delivers convenience in order placement through Online, Phone and physical modes.
- Single settlement across multiple investments.
- Multiple Payment options - Cheque/ Demand Draft, RTGS / NEFT transfers, internet banking, Debit Card, ECS Mandate and IMPS will be available.
- Pre-order validations. All financial Transactions take place ONLY after the approval of Investor(s).
- Reduce the associated risk of document handling.
- Facilitates submission of financial transactions - new fund purchase, fresh purchase, additional purchase, redemption, switch transaction, systematic investment plan, systematic transfer plan, systematic withdrawal plan.

Online Transaction Platforms

- NSE MF II – A Platform by National Stock Exchange(NSE) India
- BSE STAR MF – A Platform by Bombay Stock Exchange (BSE) India
- MFU – Mutual Fund Utility by AMFI India
- CAMS & Kfintech – Registered Transfer Agents (RTA)
- Respective AMC's online Platforms e.g. SBI, HDFC, DSP, Nippon etc.

- OUR Preferred Platform is NSE MF II by NSE India which provides:
 - Seamless / Paperless Onboarding
 - A leading Stock exchange of India
 - Ease of transaction by single click / OTP verification
 - Online KYC facility
 - Single time profile creation

IIN Creation Process



- Above Process will enable the Investor(s) to get rid of repeated manual form submissions
- After IIN Creation Investor(s) can transact Online via Net banking/ NEFT / CHEQUE / RTGS / UPI

Google Form Link
<https://forms.gle/hoMkdbBZMe7uPWtw8>

SCAN this to Register



ACH MANDATE PROCESS

For SIP there is an option of ACH Mandate through which the SIP installments are debited directly from your account on the set date.

- Apart from SIP transaction ACH Mandate provides the Investor the convenience of making transactions by OTP validation.
- The Maximum ACH mandate limit has now increased to 1 Cr.
- This is safe and transparent as the transactions will always complete only AFTER Investor's Approval.



Thank You

