

## How to transfer shares from demat account using CDSL Easiest?

Once you have **registered for easiest**, you can follow the following steps to transfer shares:

1. Log in to CDSL Easiest and select 'Setup' on the Transaction section.

The screenshot shows the CDSL Easiest web portal interface. The header includes the CDSL logo and the text 'Central Depository Services (India) Limited' with the tagline 'Convenient • Dependable • Secure'. A user is logged in, as indicated by the 'Logged as:' field. The main navigation bar contains several menu items: Account Details, Transaction (highlighted), Corporate Announcements, Miscellaneous, Freeze, E-Locker, CAS, Pledge, and Evoting. A dropdown menu is open under the 'Transaction' menu, listing options: Inquiry, Stamp Duty Calculator, Help For StampDuty Payment, Pay Stamp Duty, Setup (highlighted with a red box), Upload Transactions, Transaction cum Holding Statement, and Erroneous Transfer. The background shows a dashboard with account details like 'Registered for: Easiest', 'DP Name: ZERODHA BROKING LIMITED', and 'BSDA Flag: No'. There are also buttons for 'View', 'Download/Print', and 'Download as CSV'.

2. In this page, you need to select 'Bulk Setup'

The screenshot shows the 'Transaction List' page in the CDSL Easiest web portal. The header displays account details: BO ID, Category (Regular BO), Last Accessed On (23-Oct-2020 at 10:42:56 AM), Transfer Option (Trusted User), Registered for (Easiest), DP Name (ZERODHA BROKING LIMITED), and BSDA Flag (No). Below the header, there are filters for 'Execution Date' (23-Oct-2020), 'Setup Allowed upto' (23-Oct-2020 21:55:00), and 'System Date' (23-Oct-2020 10:54:26 AM). There are also dropdown menus for 'Status' (set to 'All') and 'Transaction Type' (set to 'Off-Market'). A table with columns for 'Select', 'Trans ID', 'ISIN', 'ISIN Name', 'Quantity', 'Counter CMPB/DPID', 'Counter Client ID', 'CM ID', 'Exch Name Mkt Type / Settle No', 'Counter Name Mkt Type / Settle No', and 'Transaction Type' is shown, but it contains no data. Below the table, there is a 'Bulk Setup' button. A note states: 'Note: Users should note that Transactions with reason code "3" will be rejected, Kindly ensure NOT TO ENTER REASON CODE for transactions where at least one leg to the transaction is a CM Settlement Account or CC Account (transfer with CDSL transactions).' The footer contains 'CDSL News', a password link, contact numbers (1800-22-5533), and social media links. There is also an 'Activate Windows' watermark.

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3. You need to select 'Transaction' and enter the execution date and enter the Beneficiary owner ID(BOID), you need to transfer the shares to. Select NA from the drop-down in the *Entity Identifier*.

Execution Date: 01-Feb-2023 | System Date: 01-Feb-2023 11:20:25 AM | Setup Allowed upto: 01-Feb-2023

Buy Sell Flag: Buy Sell

Setup BOID: 12001600

Execution Date: Select a Execution Date

Exchange ID: Select

Market Type: Select

Settlement ID: Select Settlement ID

Counter BOID: Select

Counter Party Exchange ID: Select

Counter Party Market Type: Select

Counter Settlement ID: Select Counter Settlement ID

Entity Identifier: Please select (NA selected)

UCC ID: Enter UCC ID

EX ID: Enter EX ID

TM ID: Enter TM ID

UCC Details: CM ID: Enter CM ID | Segment ID: Please select

ISIN Details: +

4. You need to select the ISIN. When you click on Account ISINs, you can see a list of all the ISINs in your holdings. Select the ISIN and enter the quantity and select the reason for trade from a list given. If your off-market transfer is not a gift/self-transfer and involves consideration, you will need to pay the stamp duty charges to CDSL before making the transfer as per the applicable rates on the consideration amount to CDSL on their platform. Stamp duty can be paid online as mentioned here.

web.cdslindia.com/myeasi/transaction/Newsetup

Buy Sell Flag: Buy Sell

Setup BOID:

Execution Date: 23-Oct-2020

Exchange ID: Select

Market Type: Select

Settlement ID: Select Settlement ID

ISIN Details

ISIN	ISIN Name	Quantity	Con
Showing 0 to 0 of 0 entries			

Reason For Trade: Transfer between Specified Family Member

Payment Mode:  Cheque  Electronic  Cash

OK CANCEL

Activate Windows. Go to Settings to activate Windows.

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5. You can see the ISIN details here. Now, you need to click on 'Submit' to setup.

The screenshot shows a web browser window at the URL [web.cdslindia.com/myeasi/transaction/Newsetup](http://web.cdslindia.com/myeasi/transaction/Newsetup). The page contains several form fields for selection and search:

- Exchange ID: Select
- Market Type: Select
- Settlement ID: Select Settlement ID
- Counter Party Exchange ID: Select
- Counter Party Market Type: Select
- Counter Settlement ID: Select Counter Settlement ID

Below these fields is a section titled "ISIN Details" with a table:

ISIN	ISIN Name	Quantity	Consideration Amount	Reason For Trade	Remark	Payment Mode	Payment Details	Transaction Status
INE562A01011	INDIAN BANK - EQ	1	0	5				

Buttons at the bottom right include "Submit", "Verify", and "Cancel".

6. On submission, you will get this message. Next, you need to verify your request.

The screenshot shows the same web browser window, but now a confirmation message is displayed:

The Settlement transactions are temporarily set up with Transaction ID 15936619. Please verify/commit the same before cut-off time.

Below the message is a "Transaction Setup" form with the following fields:

- Execution Date: 23-Oct-2020
- Buy Sell Flag: Buy (radio), Sell (radio)
- Setup BOID: [Text Input]
- Execution Date: 23-Oct-2020
- Exchange ID: Select
- Market Type: Select
- Settlement ID: Select Settlement ID
- Counter BOID: [Text Input]
- Counter Party Exchange ID: Select
- Counter Party Market Type: Select
- Counter Settlement ID: Select Counter Settlement ID

Buttons at the bottom right include "Submit", "Verify", and "Cancel".

## 7. Click on verify

Exchange ID :

Counter Party Exchange ID :

Market Type :

Counter Party Market Type :

Settlement ID :

Counter Settlement ID :

ISIN	ISIN Name	Quantity	Consideration Amount	Reason For Trade	Remark	Payment Mode	Payment Details	Transaction Status
INE562A01011	INDIAN BANK - EQ	1	0	5				

Showing 1 to 1 of 1 entries

[Delete](#) | [Edit](#)

[Submit](#) [Verify](#) [Cancel](#)

You needn't fill the Exchange ID, Counter Party Exchange ID, Market Type, Counter Party Market Type, Settlement ID and Counter Settlement ID for off-market transactions.

8. Click on Commit and then enter the OTP received on the registered mobile number and email.

Account Details | Transaction | Corporate Announcements | Miscellaneous | Freeze | E-Locker | BO-CM Earmark | CAS | Pledge | Evolving

BO ID :

Category : Regular BO

Last Accessed On : 23-Oct-2020 at 10:42:56 AM

Transfer Option : Trusted User

Registered for : Easiest

DP Name : ZERODHA BROKING LIMITED

BSDA Flag : No

### Transaction List

Execution Date: 23-Oct-2020

Setup Allowed upto: 23-Oct-2020 21:55:00

System Date: 23-Oct-2020 11:00:52 AM

Status:

Transaction Type:

Select	Trans ID	ISIN	ISIN Name	Quantity	Counter CMPB/DPID	Counter Client ID	CM ID	Exch Name Mkt Type / Settle No	Counter Name Mkt Type / Settle No	Transaction Type
<input type="checkbox"/>	15936619	INE562A01011	INDIAN BANK - EQ	1	12054200	00144321				OFF-Market

Showing 1 to 1 of 1 entries

[Commit](#) [Modify](#) [Delete](#) [Clear](#) [Bulk Setup](#)

**Note:** Users should note that Transactions with reason code "3" will be rejected, Kindly ensure NOT to ENTER REASON CODE for transactions where at least one leg to the transaction is a CM Settlement Account or CC Account (transfer with CDSL transactions).

9. Enter your CDSL easiest PIN. This is **not your 6-digit numeric CDSL TPIN**. It is an **8-digit alphanumeric PIN** that you would have received on your registered email id when you registered on CDSL easiest.

The screenshot shows the CDSL Easiest PIN entry interface. A modal window titled "PIN" is open, prompting the user to "Enter PIN" with a text input field and "OK" and "Cancel" buttons. The background shows the account details and a transaction list for INDIAN BANK - EQ.

Select	Trans ID	ISIN	ISIN Name	Quantity	Counter CMPB/DDID	Counter Client ID	CM ID	Exch Name MKT Type / Settle No	Counter Name Mkt Type / Settle No	Transaction Type
<input checked="" type="checkbox"/>	15936819	INE562A01011	INDIAN BANK - EQ	1	12054200	00144321				OFF-Market

10. With this your share transfer request is submitted.

The screenshot shows the CDSL Easiest PIN confirmation page. The page shows the account details and a transaction list with a status of "Authenticated Successfully" for transaction ID 15936819.

Transaction Id	Status
15936819	Authenticated Successfully

This is now sent to your DP for confirmation. On confirmation, the request is approved, and the transfer will be done.

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## Note:

1. The off-market transfer request placed till 6:00 PM on the date of execution will be approved post 6:00 PM on the same day. The request placed after 6:00 PM will not be approved if the execution date is the same day. To place requests after 6 PM, ensure that the execution date is the next trading day.
  2. Shares/Mutual fund holdings that are in free units **can be** transferred using this flow. Shares/Mutual funds under lock-in **cannot be** transferred using this flow.
  3. The charges to transfer shares in an off-market transaction are approx. 0.03% of the transfer value or Rs. 25 per ISIN, whichever is higher, plus 18% GST.
  4. To avoid rejection of share transfer, do not sell shares that are being transferred before the approval of easiest transaction. The share transfer will also be rejected if the balance in the trading account is negative.
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