1st Unit Holder / Guardian

UTI-SIP UTI SMaRT Form™



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भारतीय राष्ट्रीय भुगतान निगम NATIONAL BAYMENTS CORPORATION OF INDIA Utility Cod	е																	\bigcirc	Cre	ate	X	> -M	odify	· X	Car	icel
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We hereby authorise UTI Mutual Fund and their authorised	service pr	roviders an	d my bar	nker, to	debit my/o	our bank	k acco	ount usi	ing the	Mandate	Form.	If the	transa	ction is d	elayed o	r not ef	fected a	t all for n	eason	of incom	plete o	r incor	rect info	ormation	or othe	r reasor
we would not hold UTI Mutual Fund responsible. I/We will a scheme(s) of UTI Mutual Fund, have read and agreed to the applicable only for Micro SIP applicants.) The ARN holder ha	instruction	ns cum terr	ms and co	ondition	ns of SIP/N	Aicro SÍF	P, I/W	e do no	t have	any exist	ing Mic	ro SIP	s which	h togethe	er with th	e curre	nt applic	cation will	l result	in aggre	gate in	rvestm	ent exc	eeding ₹	50,000) in a ye
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2nd Unit Holder

3rd Unit Holder

Init Holding Option : $oxedsymbol{oxdot}$	Dem	at M	ode		Phys	ical	M	ode														
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ARN / RIA		UIN			ARN (Sub Code			t cheques are allowe				UTI RM No.			☐ Micro SIP ☐ Salary Saving SIP ☐ Change in Bank Details			
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SIP by cheque/s (only CTS - 2010 compliant cheques)

Not available under daily/weekly frequency

1. The submission of cheques could be as under:

Investor Type	Monthly Option	Quarterly Option
New investor	Cheque of initial investment + 5 cheques (Min)	Cheque of initial investment + 3 cheques (Min)
Existing investor	6 cheques (Min)	4 cheques (Min)

Note: if a unit holder desires to submit 12 cheques under the monthly option, the same will be accepted. No up country cheques (UCC) shall be accepted. Only local country cheques (LCC) i.e. from location where Axis Bank branch is present shall be accepted as a mode of payment under PDC w.e.f. 17th July 2012, CTS 2010 standard complied cheques shall be accepted w.e.f. 1st January 2013.

- 2. All instalment cheques under Monthly SIP (MSIP) and Quarterly SIP (QSIP) should be of uniform amount. For example; if an investor enrolls under MSIP say under UTI Flexi Cap Fund for the period May 2019 to April 2020, the first cheque can be of any amount drawn on any date of May 2019. The remaining cheques should be of uniform date. SIP date choosen by investor for uniform amount i.e. ₹ 2000/-. Similarly for quarterly option the first cheque could be of any amount and of any date of May 2019 and subsequent cheques should be of uniform date and amount.
- 3. Please draw your cheques in the name of the Scheme/Plan in which the amount is invested.
- 4. Returned cheques, if any will not be presented again.

SIP is available under the Regular Plan and Direct Plan of the below mentioned schemes

SI No.	Equity Schemes
1	UTI Banking and Financial Services Fund
2	UTI Dividend Yield Fund
3	UTI ELSS Tax Saver Fund
4	UTI Flexi Cap Fund
5	UTI Focused Fund
6	UTI Healthcare Fund
7	UTI India Consumer Fund
8	UTI Infrastructure Fund
9	UTI Innovation Fund
10	UTI Large Cap Fund
11	UTI Large & Mid Cap Fund
12	UTI Mid Cap Fund
13	UTI MNC Fund
14	UTI Small Cap Fund
15	UTI Transportation and Logistics Fund
16	UTI Value Fund

SI No.	Overnight, Debt & Fund of Funds
1	UTI Overnight Fund
2	UTI Banking & PSU Fund
3	UTI Corporate Bond Fund
4	UTI Credit Risk Fund
5	UTI Dynamic Bond Fund
6	UTI Floater Fund
7	UTI Gilt Fund
8	UTI Gilt Fund with 10 year Constant Duration
9	UTI Long Duration Fund
10	UTI Low Duration Fund
11	UTI Medium Duration Fund
12	UTI Medium to Long Duration Fund
13	UTI Money Market Fund
14	UTI Short Duration Fund
15	UTI Ultra Short Duration Fund
16	UTI Gold ETF Fund of Fund
17	UTI Silver ETF Fund of Fund

SI No.	Hybrid & Solution Schemes
1	UTI Arbitrage Fund
2	UTI Aggressive Hybrid Fund
3	UTI Balanced Advantage Fund
4	UTI Conservative Hybrid Fund
5	UTI Equity Savings Fund
6	UTI Multi Asset Allocation Fund
7	UTI Childrens Career Fund - Investment Plan
8	UTI Childrens Career Fund - Savings Plan
9	UTI Retirement Fund
SI No.	Index Schemes
1	UTI S&P BSE Sensex Index Fund
2	UTI Nifty 50 Index Fund
3	UTI Nifty 50 Equal Weight Index Fund
	o in thirty do Equal trought made to and
4	UTI Nifty Next 50 Index Fund
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	UTI Nifty Next 50 Index Fund
5	UTI Nifty Next 50 Index Fund UTI Nifty 500 Value 50 Index Fund

\dashv	2	UTI Nifty 50 Index Fund
	3	UTI Nifty 50 Equal Weight Index Fund
	4	UTI Nifty Next 50 Index Fund
\dashv	5	UTI Nifty 500 Value 50 Index Fund
	6	UTI Nifty 200 Momentum 30 Index Fund
	7	UTI S&P BSE Low Volatility Index Fund
-	8	UTI Nifty Midcap 150 Quality 50 Index Fund
	9	UTI S&P BSE Housing Index Fund
	10	UTI CRISIL SDL Maturity June 2027 Index Fund
\dashv	11	UTI CRISIL SDL Maturity April 2033 Index Fund
	12	UTI Nifty SDL Plus AAA PSU Bond Apr 2028 75:25 Index Fund
	13	UTI Nifty SDL Plus AAA PSU Bond Apr 2026 75:25 Index Fund

SI No.

Schemes available in Demat Mode

SI No.	Equity Schemes
1	UTI Banking and Financial Services Fund
2	UTI Dividend Yield Fund
3	UTI ELSS Tax Saver Fund
4	UTI Flexi Cap Fund
5	UTI Focused Fund
6	UTI Healthcare Fund
7	UTI India Consumer Fund
8	UTI Infrastructure Fund
9	UTI Innovation Fund
10	UTI Large Cap Fund
11	UTI Large & Mid Cap Fund
12	UTI Mid Cap Fund
13	UTI MNC Fund
14	UTI Small Cap Fund
15	UTI Transportation and Logistics Fund
16	UTI Value Fund

SI No.	Overnight, Debt & Fund of Funds
1	UTI Overnight Fund
2	UTI Banking & PSU Fund
3	UTI Corporate Bond Fund
4	UTI Credit Risk Fund
5	UTI Dynamic Bond Fund
6	UTI Floater Fund
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1	UTI Arbitrage Fund
2	UTI Aggressive Hybrid Fund
3	UTI Balanced Advantage Fund
4	UTI Conservative Hybrid Fund
5	UTI Equity Savings Fund
6	UTI Multi Asset Allocation Fund
SI No.	Index Schemes
1	UTI S&P BSE Sensex Index Fund
2	UTI Nifty 50 Index Fund
3	UTI Nifty 50 Equal Weight Index Fund
4	UTI Nifty Next 50 Index Fund
5	UTI Nifty 500 Value 50 Index Fund
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11	UTI CRISIL SDL Maturity April 2033 Index Fund
12	UTI Nifty SDL Plus AAA PSU Bond Apr 2028 75:25 Index Fund
13	UTI Nifty SDL Plus AAA PSU Bond Apr 2026 75:25 Index Fund

Hybrid & Solution Schemes

[&]quot;Note: Please refer Scheme Information Document (SID) for the applicable load structure of the above Listed Scheme."

UTI Mutual Fund Hag, ek behtar zindagi ka.

Instructions Cum Terms and Conditions For SIP & Micro SIP

- 1. Please refer the SID, SAI, Key Information Memorandum, all instructions, Addenda issued from time to time and our website www.UTIMF.Com for instructions, terms and conditions, applicable NAV, risk factors, load and other information, various requirements of the respective schemes / plan before investing. It is deemed that the investor has agreed to all the terms and conditions as prevailing on the date of the application / investment. SIP / Micro SIP is offered with Daily, Weekly, Monthly and Quarterly Frequency for all schemes except UTI-ULIP. UTI-ULIP is offered with the frequencies of Monthly, Quarterly, Half Yearly and Annual.
- Investor understands and agrees that mobile number and email ID registered / updated in the folio will be used by UTI MF to send alerts with regard to transactions including SIP renewals. Investor authorizes UTI MF to act on the instructions on SIP sent by him through the registered mobile number/ email id.
- 3. Any Day SIP: Investor may choose any date between 1st to 31st of the month as their SIP date. In case the SIP date chosen by the investor does not occur in any month, the SIP installment will be processed for last business day of the month. In daily SIP frequency transaction will be processed on Business days only. In case the chosen date falls on a Non-Business Day in any month, the SIP will be processed on the immediate next scheduled Business day. The investor will not hold AMC/Bank liable for processing such transactions the next day.
- 4. In case of incomplete mandate form, AMC may initiate remediation process to obtain incomplete details. This process may exceed 30 days and in such case it may also impact the registration of the SIP facility and subsequent instalments. The investor agrees to abide by the terms and conditions of NACH facilities of Reserve Bank of India (RBI).Pursuant to the AMFI Best Practice Guidelines circular on 'Risk mitigation process against Third-Party Cheques in mutual fund subscriptions' read with compliance with 'Know your Customer (KYC)' norms under Prevention of Money Laundering Act, 2002 (PMLA), UTI Asset Management Company Ltd shall not accept applications for SIP accompanied with Mandates from Third Parties.
- 5. Default Values: In case the SIP date is left blank by the investor the SIP will be registered with a default date of 7th of every month. In case the "SIP From date" is left blank, then by default the SIP will be registered from the next month of the month in which the SIP application is submitted. If the Frequency is not ticked, then by default the SIP will be registered with Monthly frequency. If End date is not mentioned by the investor, SIP will be registered as Perpetual SIP. If the SIP / Micro SIP amount is left blank by the investor, then by default SIP will be registered for Rs. 500 for Daily, Weekly and Monthly frequencies and Rs. 1500 for Quarterly frequencies. Investors are required to submit the SIP forms at least 21 days prior to the first SIP date opted.
- 6. New Fund Offer of Open Ended Schemes: If the SIP is allowed as per the Scheme Information Document, during the NFO, the investor may submit the SIP form during the NFO period. However, the SIP start date shall be post the date on which the Scheme reopens for subscriptions, subject to the 21 days gap between date of submission and SIP start date as described in point no. 5.
- Minimum Amount: Please refer the Scheme Information Document and the Addenda issued from time to time.
- 8. SIP in folio of a Minor: Name of Guardian must be mentioned if investments are being made on behalf of a minor. Date of birth is mandatory in case of minor. The minor shall be the first and the soleholder in the account (folio).Minor's name must one of the holders in Bank Account on which the mandate is being submitted alongwith the SIP Form. This conditions shall not apply to SIP under UTI CCF Scholarship option.
- Unit Allotment: Unit allotment will be as per the NAV applicable for the date of realization of the investment amount.
- 10. The applications will be received at all Official Points of Acceptance of UTI Asset Management Company. In case of SIP with post dated cheques, only CTS cheques will be accepted. No outstation cheques will be accepted.
- Account Statement: An account statement will be sent to the Unit Holders through email wherever email id is registered. The physical statement would be despatched to the investors once in 6 months.
- 12. Investors can choose to discontinue the SIP by submitting a request giving at least 1 week notice to the registrar of the schemes. In case of 4 consequent failures of SIP installments, the SIP will be paused automatically without any written request from the investor.
- 13. It will be sole responsibility of the investor's bank and / or branch to ensure proper registration of the debit mandate and confirm the registration. Investor will not hold UTIMF or its service providers responsible if the transaction is delayed or declined or not effected or the investor's bank account is debited in advance or after the specific

- SIP due date to various clearing cycles of local holidays. Investors will not hold UTIMF or its service providers responsible for non allotment of Units of SIP / Micro SIP if the payment is not received from the Unit Holder's bank for any reason.
- 14. UTIMF reserves the right to reject the SIP / Micro SIP / Debit Mandate without assigning any reasons therefor.
- 15. If the investor is investing through an Financial / Investment Advisor, the investor must clearly mention the ARN / RIA code and the name of the Advisor, Sub ARN Code and EUIN in the application. In case nothing is mentioned, the application will be processed in the Direct Plan of the Scheme.
- 16. Direct Plan: Investors subscribing under direct plan of a Scheme will have to indicate "Direct Plan" against the Scheme Name in the application form for Example "UTI Dividend Yield Fund Direct Plan. Investors are advised to write "Direct' in the distributor column when subscribing units in Direct Plan of a scheme. However, even if an Advisor code is mentioned on the application where the scheme name is mentioned with Direct Plan, the Advisor code shall be ignored and application shall be processed in Direct Plan only.
- 17. The Unit Holder(s) agree that, UTIMF / its Registrar and their agents shall not be held liable for any unsuccessful registration and / or transaction due to any action / inaction of the unit holder's bank including but not limited to the reasons mentioned below and agree to indemnify UTIMF / UTIAMC / RTA for all liabilities, losses, damages and expenses which they may consequently incur or sustain either directly or indirectly.
 - Non acceptance or rejection of debit mandate for whatsoever reason by the unit holder's bank/ branch with or without any reason assigned by the unit holder's bank.
 - b. Loss of debit mandate form in transaction from RTA to the unit holder(s) bank / branch
 - c. Non-registration of the debit mandate by the unit holder(s) bank/ branch
 - Deemed registration due to Non confirmation of registration or rejection by the bank and any subsequent rejection of the debit of bank account for funds.
 - e. Non availability of funds in the bank account of Unit Holder at the time of debit.
 - Rejection of registration or transaction debit for any reason or without assigning any reason whatsoever.
- 18. SIP Step Up: By opting for this facility investor can choose to increase the SIP amount (SIP / Micro SIP) by a predefined amount at a predefined interval of time (Half Yearly orYearly). For availing this facility the investor has to, a) provide the details of the SIP step up in the SIP enrolment form, b) SIP Mandate to bank with Debit Type as Maximum Amount, c) Bank Debit amount sufficient to accommodate the maximum stepped amount. In case the amount mentioned in the amount column of bank mandate falls short of the stepped amount, the Step Up will be terminated and the normal SIP or latest stepped amount shall continue to be debited. d) the minimum step amount is Rs. 500/- in multiples of Rs. 500/-,e) if Step Up frequency is not mentioned, the default frequency will be taken as Yearly. f) in case request for cancellation of step up is received from the investor, the last stepped up amount will continue for the rest of the period of the SIP unless modified by the investor.
- 19. SIP Pause: Pause facility is available for all eligible schemes except UTI-ULIP scheme. This facility can be availed for a period of 6 months. SIP Pause can be exercised by the investor 2 times during the tenure of the SIP. Investor can pause his SIP for a minimum of 1 month and a maximum of 6 months under daily, weekly and Monthly frequencies and a minimum of 1 Quarter and a maximum of 2 Quarters under Quarterly frequency. In case the investor's KYC is not complied as per the SEBI guidelines at the time of processing the SIP installment the SIP shall be paused automatically and installment shall be presented to investor's bank till investor complies with KYC guidelines. Upon subsequent compliance with KYC guidelines, the SIP installment falling due post compliance will be presented to the investor's bank. The installments that have fallen due prior to KYC Compliance shall not be presented for debit.
- 20. Transaction Charges: For applications received in Regular Plan through mutual fund distributors who have opted in for the transactions charges where subscription amount of Rs. 10,000 or more transaction charges of Rs. 150/- (for first time mutual fund investors) and Rs. 100 (for existing mutual fund investors) would be deducted from the subscription amount and paid to the distributors. Units will be issued against the balance amount invested.
- 21. Multi SIP: Investor can start an SIP in multiple schemes (3 schemes) using one form with all the parameters suiting his requirement. In case investor wants to register SIP in more than 3 schemes he may use an additional SIP enrollment form.
- 22. Change of Bank: Investor can change the bank from where the debits of SIP installments are happening by submitting the SIP enrolment form by ticking the change of bank option in the SIP enrolment form. Since the mandate is to be registered on his new bank, the form must be submitted at least 21 days prior to the next installment.
- 23. Pause facility is available for all eligible schemes except UTI ULIP. Can be opted only after payment of 6 installments and twice in entire life span of SIP tenure. SIP can be paused for minimum of 1 installment and maximum of 6 installments (Monthly Frequency) and minimum of 1 quarterly installment and maximum of 2 quarterly installments (Quarterly Frequency).

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