

How to convert MF holdings to online format - Individuals

 **Login to your Trading Account**

User ID	<input type="text"/>
Password (Case Sensitive)	<input type="password"/> Forgot Password
Security Key / Access Code (Case Sensitive)	<input type="text"/> Forgot Key
	<input type="button" value="Login"/> <input type="button" value="Reset"/>
	Generate Access Code (If you are not a user of Security Key)

Login Issues

- › [Forgot Password](#) ?
- › [Forgot Security Key](#) ?
- › [Lost/Damaged Security Key](#) ?
- › [Activate Security Key](#) ?
- › [Didn't get Security Key](#) ?

Enter your User ID, Password and Security Key / Access Code to log on to your trading account.

[Not an account holder ?](#)





Equity	Derivatives	Mutual Fund	Primary Market
Stocks	Index F&O	Purchase	IPO
Sell From Existing	Stock F&O	Redeem/Switch	OFS
Basket Order	Currency F&O	SIP	Bonds&NCDs
GTC Order	Global Indices	Transfer to Online	
Auto Invest	Basket Order		
Celebration SIP			
Bonds&ETFs			



Click on Place order -> Mutual Fund -> Transfer to Online

AI CHAMPDANY INDS LTD			7-17-2014
Recommendation	Target Price	Current Price (On report dt.)	Read Report
Buy (+)	Rs. 25	Rs.17.86	
Remarks + .			

THERMAX LTD			6-16-2014
Recommendation	Target Price	Current Price (On report dt.)	Read Report
Sell (-)	Rs. 1000	Rs.900	
Remarks + .			

Research Centre

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Notice Board

As per the circular by NSE, position limits for Exchange Traded Currency Derivatives have been revised. [Know More](#)

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Transfer to Online - MutualFund

Client Code: PXF23

To transfer your existing offline mutual fund holdings to your Online Kotaksecurities.com Mutual Fund holdin

To View your existing Offline to Online Transfer In Requests on kotaksecurities.com [Click here](#)



Click on the 1st option which states “To transfer your existing offline mutual fund holdings to your Online Kotaksecurities.com Mutual Fund holdings”



Transfer to Online Place Order - MutualFund

Date : 29 Sep 2014

Client Code: PXF23

Holding Pattern

First Holder : PXF23 Cheque Name

Second Holder : Inchody

Fill in all the details and click on "Submit" at the end of the page.

Subject :Transfer of Mutual Fund holdings to Online Kotaksecurities.com holding

I/WE would like to transfer my/our following Offline/Non-Kotaksecurities.com Mutual fund holdings into my/ our Online Kotaksecurities.com Mutual Fund holdings

Kindly select the AMC from the AMC list :

Sr No.	Scheme Name	Existing Folio_no	Existing Online Folio_no
1	<input type="text" value="Kotak Contra Scheme Growth"/>	<input type="text" value="123456"/>	<input type="text" value="1010134/88"/>
2	<input type="text" value="Select Scheme"/>		<input type="text" value="Select Folio"/>



Acknowledgment of the transferin request

The Transferin Request has been accepted and the reference no is 2152.

Do You Wish to add More Transferin Requests :

YES NO



If you want to add more Transfer requests, click on “Yes” and fill in the details as before. If not, click on “No” to continue.



Transfer to Online View - MutualFund

Instructions:

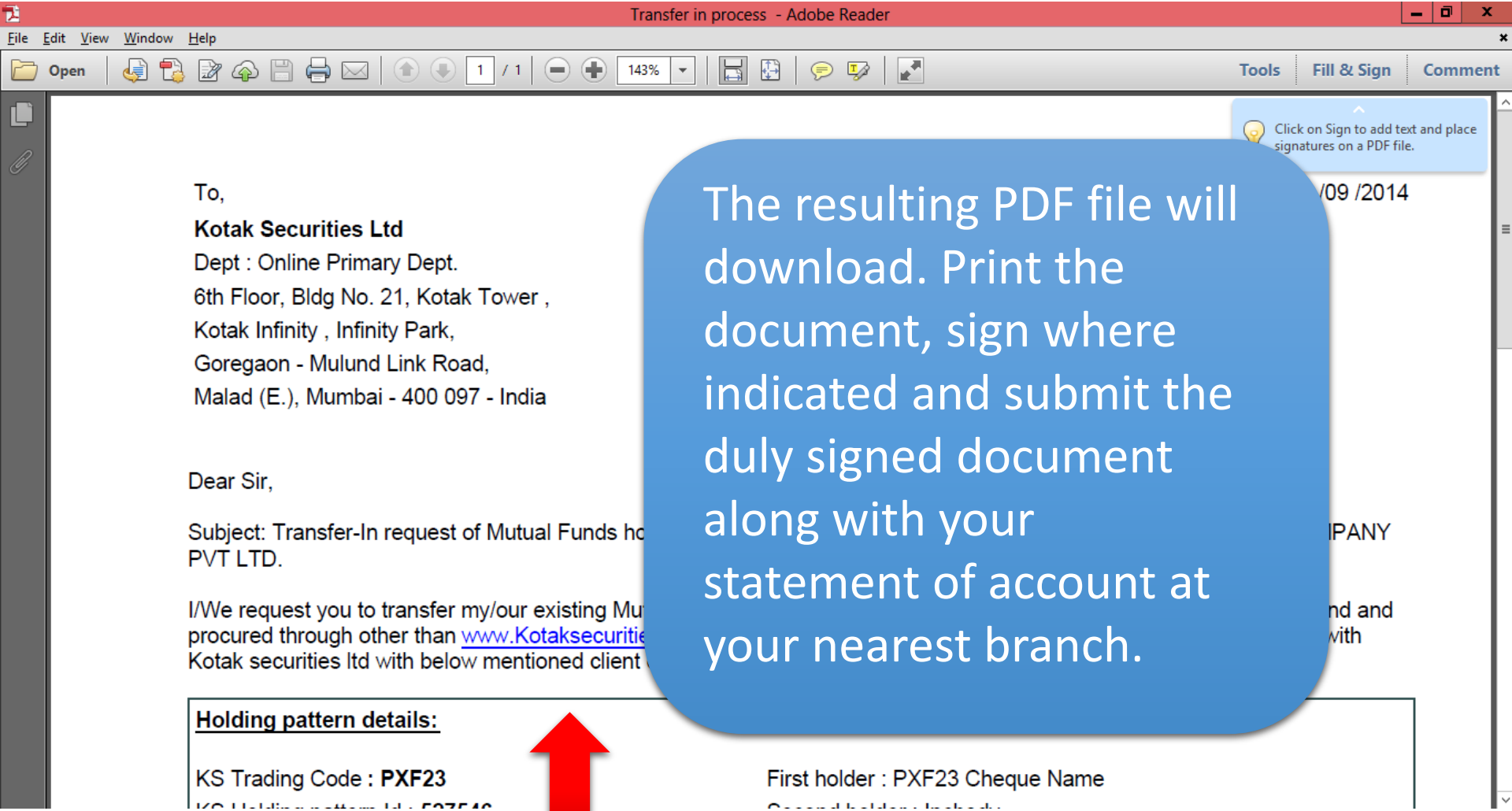
Please select "PDF" check box and click on "PDF" button to generate the PDF file. For verification please attach the copy of latest Portfolio/Account statement mentioned in the letter. **In lieu of the requested portfolio statement your request will be processed.** Please note it takes minimum 10 working days to display mutual funds details. On conversion please check your holdings details at Mutual funds portfolio page. Please note on Rejection, the discrepancy shall be communicated to you.

Save the Request number for your reference. Select your Order Request and click on "PDF" to generate a PDF file of the request

orders.
st letter to the address
ay the conversion.
e conversion process.

Click to Delete	Request No	AMC Name			PDF
<input type="radio"/>	1921	DEUTSCHE MUTUAL FUND			<input type="radio"/>
<input type="radio"/>	2139	RELIANCE MUTUAL FUND	06/03/2014	Hard Copy not received	<input type="radio"/>
<input type="radio"/>	2119	BIRLA SUN LIFE MUTUAL FUND (RTA-Cams)	09/03/2012	Rejected	<input type="radio"/>
<input type="radio"/>	2112	AXIS Mutual Fund	10/02/2012	Pending	<input type="radio"/>
<input type="radio"/>	2125	KOTAK MAHINDRA MUTUAL FUND	10/10/2012	Completed	<input type="radio"/>
<input type="radio"/>	2120	AXIS Mutual Fund	12/03/2012	Completed	<input type="radio"/>





The resulting PDF file will download. Print the document, sign where indicated and submit the duly signed document along with your statement of account at your nearest branch.

