

## SELECTION OF TRIGGER/ALERT OR CHANGE OF TRIGGER/ALERT

Sole/First Holder : \_\_\_\_\_

Joint Holder 2 : \_\_\_\_\_

Joint Holder 3 : \_\_\_\_\_

Common Account No.: \_\_\_\_\_ Scheme Code:     (refer overleaf)

Transaction Date (Date of allotment): \_\_\_\_\_ Amount Invested: \_\_\_\_\_

I wish to opt for (please ☒ any one) ☐ Trigger ☐ Alert

**Under Trigger option, action selected in Section B will be carried out when criteria specified in Section A is reached.**

**Under Alert Option, only a notification will be sent when criteria specified in Section A is reached.**

**Trigger/Alert option is not available under asset allocation programme. Only one Trigger can be selected per transaction for a Scheme, Plan & Option.**

### Section A

#### Trigger/Alert Type

Please (✓) (Any one)

#### Details

#### Percentage

☐ Investment Value

Rs.

eg. Rs. 11000

Trigger/Alert will be activated when your initial investment value increases from Rs. 10000 to Rs. 11000

OR

%

eg. 10%

Trigger/Alert will be activated when your initial investment value appreciates by 10%

☐ Capital Appreciation

Rs.

eg. Rs. 1000

Trigger/Alert will be activated when your initial capital of Rs. 10000 appreciates by Rs. 1000

OR

%

eg. 10%

Trigger/Alert will be activated when your initial capital value appreciates by 10%

☐ NAV

Rs.

eg. Rs. 11

Trigger/Alert will be activated when the NAV of the selected scheme, plan, option of your investment become Rs. 11

OR

%

eg. 10%

Trigger/Alert will be activated when the NAV appreciates by 10% over that of your date of allotment of units

☐ BSE Sensex

eg. 5000

Trigger/Alert will be activated when the BSE Sensex reaches 5000 points

OR

%

eg. 10%

Trigger/Alert will be activated when the BSE Sensex Rises or Falls 10% points over that of your date of allotment of units

☐ NSE NIFTY

eg. 1500

Trigger/Alert will be activated when the NSE Nifty reaches 1500 points

OR

%

eg. 10%

Trigger/Alert will be activated when the NSE Nifty Falls 10% points below that of your date of allotment of units

☐ On Date

DD MM YYYY

eg. 08-11-2010

Trigger/Alert will be activated on 08-Nov-2010

The example (eg.) given above is based on initial investment of Rs. 10,000 at NAV of Rs. 10.

Trigger/Alert will be applicable from date of allotment of Units. \*Rise, Fall & Rise or Fall is applicable only for percentage change

### Section B (To be filled only in case of Trigger option)

Please (✓) any one

☐ Full Redemption OR

☐ Redemption of Gains only OR

☐ Full Switch into Scheme Code:     OR

☐ Switch of only Gains into Scheme Code:     OR

☐ Full Redemption: Original investment amount reinvested in Scheme Code:     and gains paid OR

☐ Full Redemption: Gains reinvested in Scheme Code:     and Original investment amount paid OR

☐ Redeem No. of units  OR

☐ Redeem Amount Rs.

If only Gains are to be redeemed or switched, then please specify whether the relevant Trigger opted for remains alive for subsequent activation on the original investment until advised: Please (✓) ☐ Yes ☐ No

I/We understand that if the above triggers are not activated and/or implemented due to reasons or otherwise, I/We would not hold the Fund responsible. If necessary, the Fund may initiate adjustments to correct any credit/payment/switch entries or otherwise made in error to me/us. This authority is to remain in effect until revoked by me/us in writing. I/We understand that the Fund reserves the right to amend/terminate this arrangement at any time.

To authorise redemption or systematic switch or systematic withdrawals on a Scheduled basis, for each transaction, complete the following. Please do not complete systematic switch or systematic withdrawal Form(s) if triggers are to be linked with systematic switch and/or systematic withdrawal. **A Trigger/Alert once activated will not be reactivated unless advised.**

Signature of 1st Holder

Signature of 2nd Holder

Signature of 3rd Holder