



Karvy *I-Zone*

Your Ultimate
Investment Destination



Karvy I-Zone Plus is a brand new comprehensive online investment platform launched by KARVY for the discerning clients. This product provides the requisite advise & resources to clients for making judicious investments decisions amongst various asset classes & products, based on specific risk and return profile of the client as well as on the time horizon for the investments. The investment advise is provided based on in-depth research conducted by KARVY.

I-Zone Plus offers the advantage of confident investment transactions in equities, commodities and currency derivatives, mutual funds, IPOs of equity shares through a state-of-the-art online investment platform with fully secure online payment gateways with multiple banks.



- ❖ Advisory service with a comprehensive online investment platform
- ❖ Free financial advise on portfolio allocation in various asset classes
- ❖ Free online stock-broking and attractive margin funding options*
- ❖ Daily equity market research reports and calls through SMS
- ❖ Life time free demat account
- ❖ Free Mutual Fund transactions to an unlimited extent, including unlimited SIP transactions
- ❖ Access to research reports on Mutual Funds, IPOs and Insurance #
- ❖ Free online commodities broking account **
- ❖ Application in IPOs with attractive loan options for applications*
- ❖ Regular portfolio statement for better planned future investments
- ❖ Loans against securities *
- ❖ Free subscription of 'KARVY FinaPolis' magazine



- ❖ Provides comprehensive advisory service for smart investments
- ❖ Offers comprehensive product range
- ❖ Enables transaction in NSE, BSE, MCX and NCDEX
- ❖ Enables both cash and derivative trading in equities
- ❖ Enables trading in currency and commodity derivative
- ❖ Unlimited transactions in Mutual Funds
- ❖ Enables online application for IPOs
- ❖ Easy transfer of money through secured online payment gateways with multiple banks – ICICI, HDFC, IDBI, Axis, Bank of Rajasthan
- ❖ Safe and secure transaction engine
- ❖ Call center support @ 18004258283 for execution of transactions

Enabling informed action



- ❖ Live market news
- ❖ Quality research help available live on the trading screen
- ❖ Top analysts providing inputs on strategies and recommendations
- ❖ SMS Alert facility for tracking investments
- ❖ Updated information on personal finance through a free subscription of 'FinaPolis'
- ❖ Portfolio tracker with quarterly portfolio statement
- ❖ Seamless integration between bank, broking, MF and DP accounts

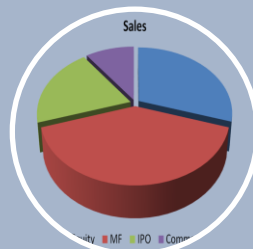
Ease of transactions



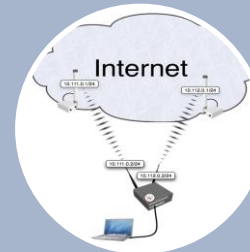
Advisory service based on In-depth Research Inputs

Top quality technology

Country wide branch network

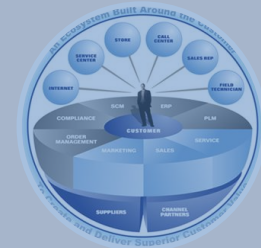


Multiple products



Multiple versions for online trading

Call center support



Multi bank payment gateways

Comprehensive Online Investment Platform



- ❖ Comprehensive net worth statement
- ❖ Quarterly investment portfolio statement
- ❖ Live tracking of investments
- ❖ Corporate news a click away
- ❖ Streaming quotes and news from the exchange on your desktop
- ❖ High quality support team to enable you to invest profitably



The Client

- ❖ Should be major
- ❖ Should have bank account with ICICI / HDFC / Axis / IDBI / Bank of Rajasthan with online transaction facility
- ❖ Should have valid PAN, address proof, recent passport size photographs
- ❖ Should have access to internet



The Value You Get

If these are not part of I-Zone +	Then their value will be
Your MF transactions in a year (assumed to be valued at Rs. 1,00,000)	Rs. 1,500/- *
Normal Annual Maintenance charges for a Equity Broking + Demat Account	Rs. 500/-
Normal Annual Charge for a Commodities Broking Account	Rs. 200/-
Market Price for an elementary health check up	Rs. 1,500/-
Subscription to 'KARVY FinaPolis' magazine	Rs. 300/-
Total Value Payable Upfront	Rs. 4,000/-

** Calculated @ 1.5% of investment value, charged by a bank
or a financial product distributor as advisory fee*



The Value You Pay For

You initially pay a Margin deposit of Rs. 5,000/-

Rs. 200/- gets deducted from this Margin deposit every month, towards Account Maintenance Charges (AMC)

The remaining Margin deposit amount can be used for your trades

Alternately, you initially pay a lump sum amount of Rs. 7,000/- (comprising of Margin deposit of Rs. 5,000/- and an upfront AMC of Rs. 2,000). With this option, you get a 16.67% discount on AMC of Rs. 2,400, that would otherwise be payable in installments. Also, you get to use the entire Margin deposit of Rs. 5,000/- for your trades.

Rs.350 is deductible additionally towards stamp charges.

2nd year onwards, you have the option of paying the AMC as Rs. 200/- p.m. or an upfront lump sum amount of Rs. 2,000/-

You save a minimum of Rs.1,250/- on what you would have had to pay, if you had not registered for I-Zone +

I-Zone + provides you a LIFE TIME FREE demat account (AMC for demat a/c is life-time free –Transaction charges will be as applicable)

Links to existing Karvy relations



- ❖ **Offline Broking ID** – The same UCC would be allotted for the I-Zone account
- ❖ **Offline Mutual Fund Code** – The existing Offline Folios if held singly in the name of Sole / First Applicant would be available for display in the online Login of the client. The portfolio would be updated on a daily basis. However, online transactions can be executed in such offline folios only after conversion of such offline folios to online folios. For conversion, the client will need to provide one letter to each AMC in whose scheme he/she has invested offline, mentioning the offline Folio number.
- ❖ **Demat ID** – If the client already holds a demat account with Karvy where the holder(s) in demat is same as applicants in the I-Zone + form and in the same sequence, the existing demat account can be connected to the I-Zone + account. All IPO bids, in such case, would be placed in the name of joint holders as in demat account.



- ❖ DP account with Karvy is mandatory
- ❖ Mutual fund applications and equity broking trades will be in the name of Sole / 1st applicant only
- ❖ IPO bids will be in names as mentioned in DP
- ❖ Nomination shall be effective across DP holdings, MF portfolio, Broking ledger balances
- ❖ Passwords / Correspondences will be made to Sole / 1st applicant only
- ❖ MF – KYC is client’s responsibility. However Karvy shall support in getting the client KYC-compliant by forwarding the KYC form to CDSL Ventures (entity responsible for authorizing KYC compliant status). Unless the client is KYC compliant, he cannot invest more than Rs. 50000 in MF Folio.



Thank You
