

## **Steps for Opening a Demat Account (Offline) For NSDL & CDSL**

**Step 1** - Fill the Details and Submit the Demat Account Opening Form (Which is available on website under the download option) ☑ Fill up the Physical form for opening a demat account with Sajag Securities Pvt Ltd. Fill all mandatory details like your Pan number, mobile number, email id, annual income range, Address, etc.on the form.

**Step 2** – Personally submit the form with Supporting Documents to the nearby service centre or HO for in-person verification process. ☑ Submit the copies of required document – PAN, Aadhar, Bank details (Original cancel cheque or Passbook first and latest transaction page), 1 passport size Photo on KYC form. All supporting documents should be self-attested by the all respective holders.

**Step 3** - Complete E-KYC Process and Receive Demat Account Number ☑ Once verification and data entry process done by SAJAG, Demat account number will be generated and inform to the client shortly.

## **Step-by-Step Account Opening Process (Online) for CDSL Only**

### **Step 1: Mobile Verification**

- Enter your mobile number. & Verify using the OTP received on your phone.

### **Step 2: Email Verification**

- Enter your email ID. & Verify using the OTP sent to your email.

### **Step 3: Segment Selection**

- Choose the investment segments (Equity, Derivatives, Commodities, etc.) you want to activate.

### **Step 4: PAN Verification & DigiLocker**

- Enter your PAN for validation. & Connect with DigiLocker for KYC verification.
- Enter DigiLocker OTP & PIN. & Provide consent and confirm your details from DigiLocker.

### **Step 5: Personal & Nominee Details**

- Fill in your personal details. & Add nominee details.

### **Step 6: Bank Details**

- Enter your bank account information. OR Upload bank proof (cheque/copy of passbook).

### **Step 7: Document Uploads**

- Upload your signature.
- Complete IPV (In-Person Verification).

### **Step 8: Form Preview & E-Sign**

- Preview Equity form (PDF). & E-sign the Equity form using OTP authentication.
- Preview KRA form (PDF). & E-sign the KRA form using OTP authentication.

### **Step 9: Completion**

- Once all steps are done, you'll see the **“Thank You” page** confirming successful account opening.