MAX STOCK BROKING PVT. LTD.

USER GUIDE FOR ONLINE DEMAT/TRADING ACCOUNT OPENING
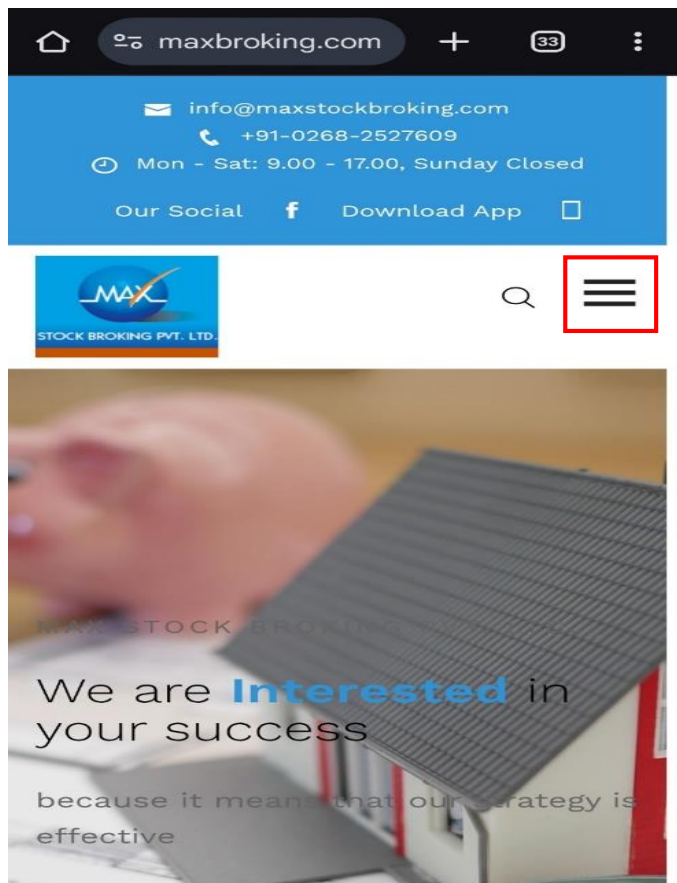
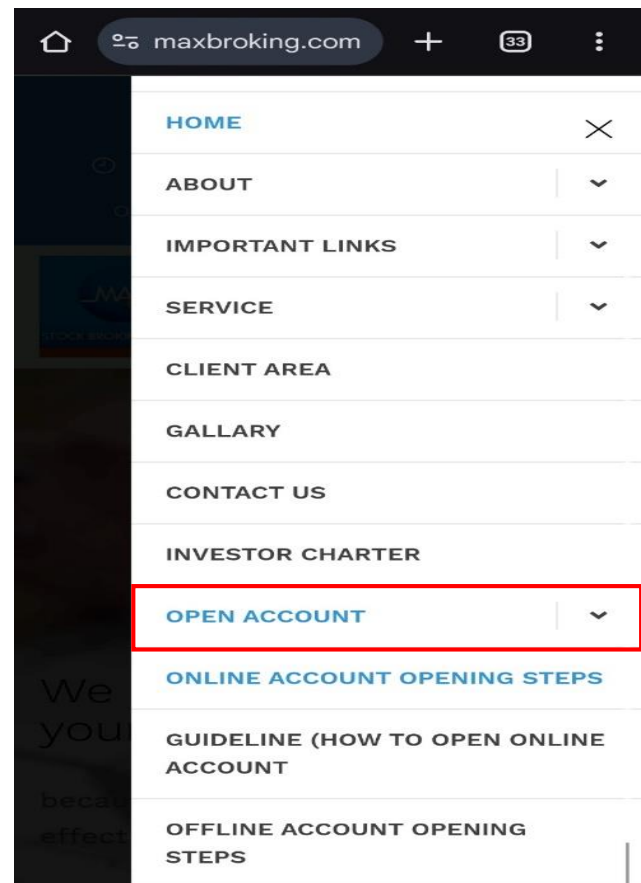# For Opening Demat / Trading Account with us, Please Visit www.maxbroking.com on a device having Camera, Microphone and Location.

In the Navigation panel, Click on "ONLINE ACCOUNT OPENING" in the "OPEN ACCOUNT".

Step 1

Step 2

Clients will be redirected to the Mobile number Verification Page. (Input your Mobile Number)

1. Mobile Verification.

User will get OTP (One-Time-Password) on the given mobile number fill the OTP and press "Continue" Button.

If the applicant don't have there own Mobile Number then clients can choose from list of Relations.

Step 3

Step 4

2. EMAIL VERIFICATION.

Users are asked to fill their Email Address.

Enter the OTP received in your Email Address.

If the applicant don't have there own Email then clients can choose from list of Relations.

Step 5
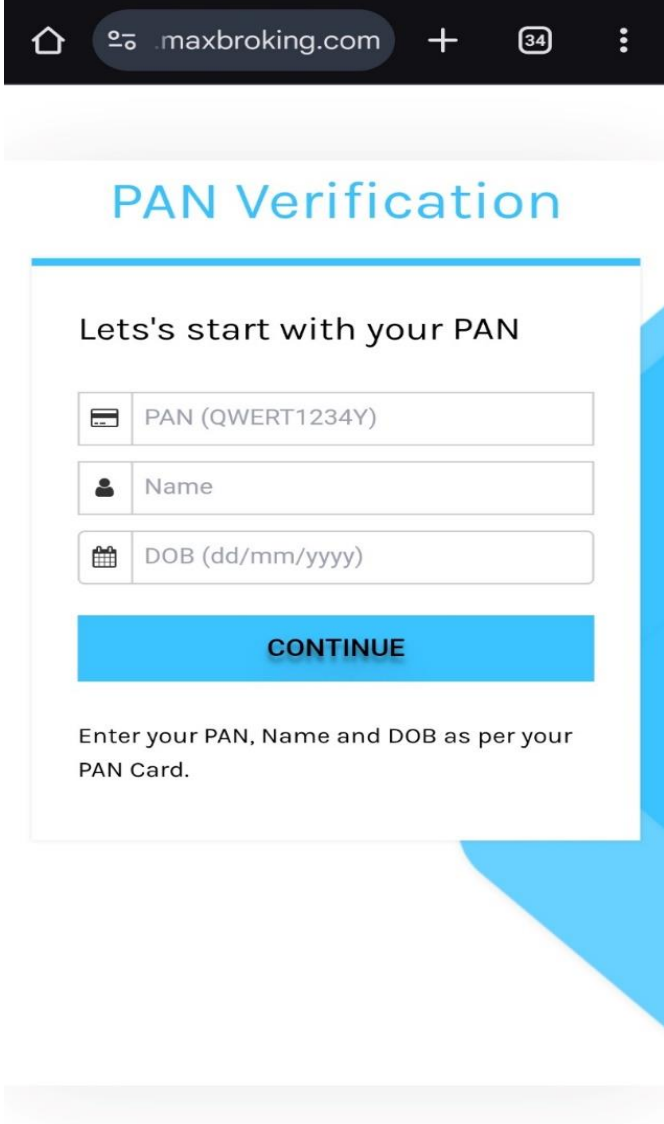
Step 6

3. PAN VERIFICATION.

After Verifying Mobile Number and Email Address, next step is to verify PAN.
User are advised to Enter Pan number, Name (As per PAN Card) and Date Of Birth.

Step 7

4. Exchange Details / Segment Selection.

Clients are advised to select / Tick Segments as per their Trading requirement.

Equity and FNO (Derivative).

Step 8

5. Aadhaar Verification Using DIGILOCKER

As soon as Client click on "Connect to Digilocker" on Step 9 they will be redirected to the Digio KYC Process page as shown in Step 10.

Step 9
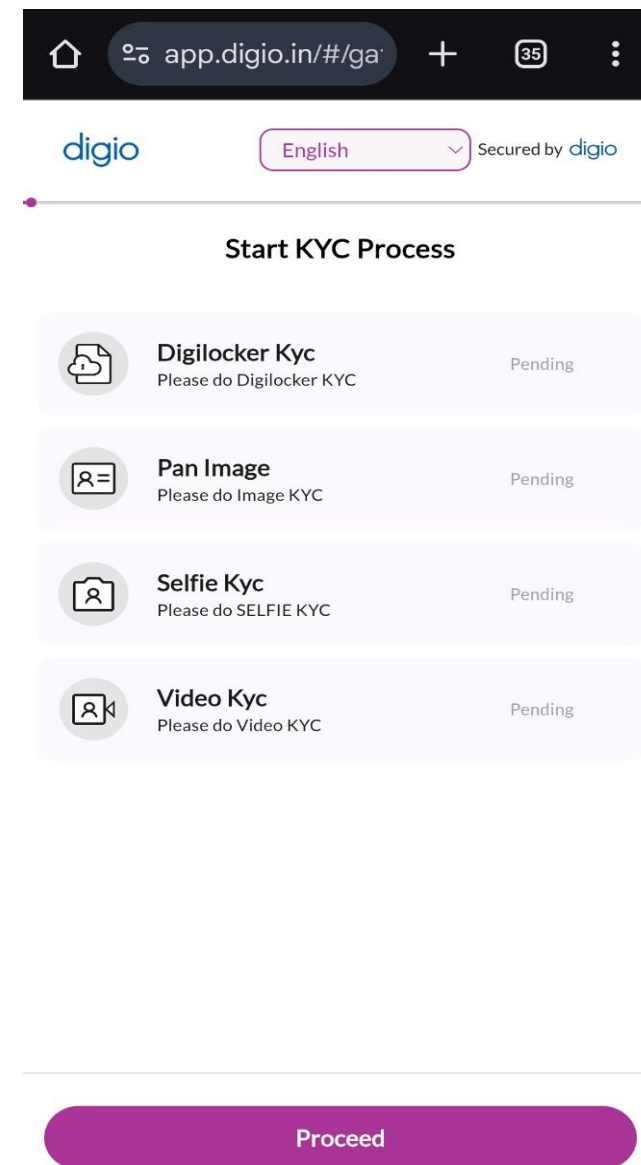
Step 10

Step 11 : is Client Consent Form requested by Digio.

Ensure the checkbox is ticked before clicking on "Allow with aadhaar OTP".

After User Click on "Allow with aadhaar OTP"

-> UIDAI will send an OTP to mobile number registered with Aadhaar Card once you get the OTP, fill it in the textbox and click "SUBMIT".
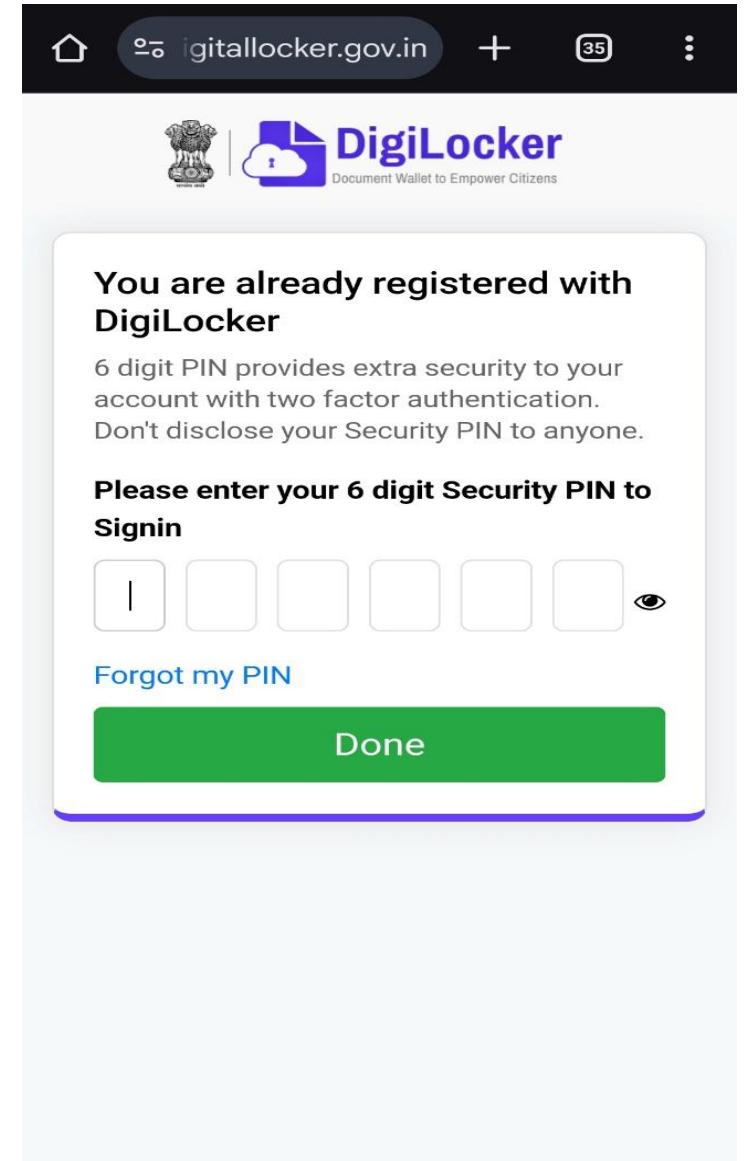
-> If you don't receive any OTP then select "Resend OTP" situated below "SUBMIT" button.

Step 11

Step 12

After validating OTP from your Aadhaar registered mobile number you will see this page .

Step 13

-> Users are supposed to perform selfie KYC by taking a live photo through the page provided by Digio.

-> Note: Client must allow browser popup permission in their device.

SELFIE KYC

Please do SELFIE KYC

If browser popup is available, please allow the permission.

Step 14

-> After Selfie KYC comes Video KYC, in which clients are advised to remove specs and perform it under proper light.

-> Note: please allow microphone and camera permissions in the mobile browser.

Video KYC

Please do Video KYC

• Write the OTP clearly on a paper and show it to camera.

🔔 Please look straight at the camera. Remove specs if any. Detecting face.

Step 15

-> **Once Selfie and Video KYC is completed then clients will be directed to this page which have "NEXT" button and a statement showing the status of your Aadhaar KYC process "Success or Failed".**

-> **Overview of Upcoming Processes :-**
 - **Other Details.**
 - **Bank Verification.**
 - **Nominee Details.**
 - **Confirm Nominee Details.**
 - **Upload Documents (Signature & Income Proof).**

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Next
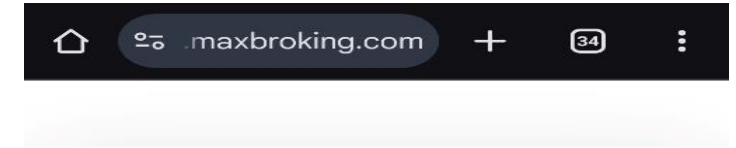
SUCCESS! Aadhaar
Detail Verify.

Complete Your EKYC Proccess!

are Pvt. Ltd.
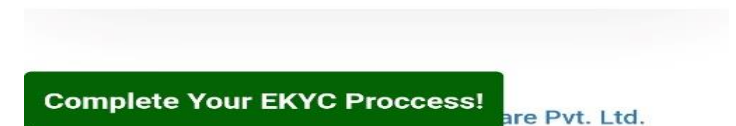
Step 16

6. Other Details Form.

-> Fill out your father's/Spouse Name and Mother's Name.

-> Select Your Marital Status and Residential Status and Citizenship.

-> Clients can opt in for DIS (Delivery Instruction Slip) (May apply courier charges).

(*) Fields are Mandatory.

-> Select Occupation type, PEP stands for Politically Exposed Person(if you are politician than select Applicable , otherwise select Not applicable.
-> Select your Trading Experience, Account Settlement period whose options are Monthly or Quarterly.
-> Select Your Annual Income From given ranges.
-> Client have to declare Yes/NO if they are tax resident of any other country other than India.

Step 17

Step 18

7. Link Bank Account.

-> As soon as Client Provide IFSC of their Bank Account which they want to add for fund Deposit / Withdraw then our System will fetch and fill other Details of your bank in the MICR, Bank Name, City, State and PIN CODE textboxes.

-> Users have to fill Bank Account Number by their own.

-> Click on "VERIFY WITH PENNY DROP" button.(our system will initiate a 1 rs transaction from our Organization's Bank Account).

Step 19
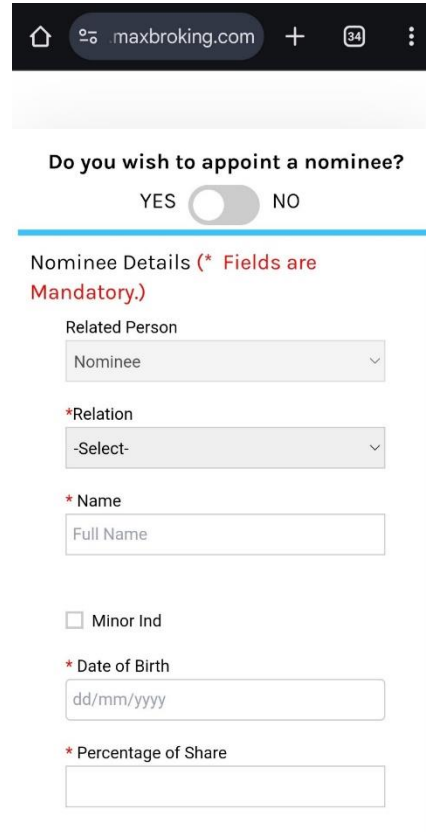
8. Nominee Details.

-> Clients have to select Relation of Nominee from drop down list.

-> Fill the Full Name of your Nominee.

-> Check the Minor Individual box if Nominee is Minor (Below 18 years).

-> Enter the Date of Birth and percentage of share to alot the Nominee.
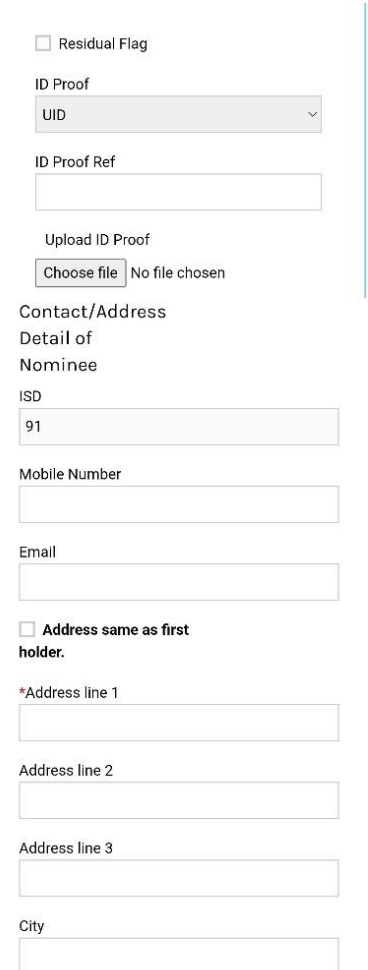
Step 20.

-> Check the Residual Flag.

-> Select The ID Proof you are about to upload and Fill its Ref Number, then click on "choose file" to upload photo of id card.

-> Fill the Contact / Address Details of Nominee including mobile number and Email.

-> If Nominee's Residential address is same as the applicant then tick the checkbox named "Address same as first holder."

Step 21.

-> After filling out Nominee Details click on the "Add Nominee" button and validate the Nominee information.

-> After Validating the information click on "Submit" Button.

City

*District

PIN Code

*State

-Select-

Other

*Country

India

Add Nominee

Nominee Detail

Edit	NomineeSerialNo	NomineeType	NomName	S
✎	1	N	RAJAN	1(

SUBMIT

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Step 22.

9. Upload Documents.

-> Clients have to Sign on a blank page and take a picture of signature then click "choose file".
-> Note : Maximum upload file size is 45 KB and Supported Formats are "jpeg", "jpg" and "png".

-> If Client wish to trade in Futures and Option Segment then Select the income proof type from the given list.
-> Note : Maximum Upload file size is 5 mb and Supported Formats are "jpeg", "jpg", "png" and "PDF".

Upload Documents

Signature

Please sign on a blank paper with a pen & upload photo of the same signatures using pencils, sketch pen etc., are not accepted.
Maximum Upload file size is 45 KB.('jpeg', 'jpg', 'png' formats only.)

[Choose file] No file chosen

Income proof

Income proof is required if you want F&O and MCX trading. Not required if you just want to buy and sell equity stocks.
Maximum Upload file size is 5 mb. ('jpeg', 'jpg', 'png', 'PDF' formats only.)

Income Selection

[--Select-- ▾]

[Choose file] No file chosen

[CONTINUE]

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Step 23.

-> Options of Income proof type are mentioned in the picture.
-> Clients can upload any of proofs from the Step 23_a picture as Income Proof.

--Select-- ⦿

Bank Account Statement for Last 6 Months. ○

COPY OF ANNUAL ACCOUNTS ○

COPY OF DEMAT ACCOUNT HOLDING STATEMENT ○

COPY OF ITR ACKNOWLEDMEN ○

NET-WORTH CERTIFICATE (NOT MORE THAN 1 YEAR OLD) ○

ANY OTHER RELEVANT DOCUMENTS SUBSTANTIATING OWNERSHIP OF ASSETS ○

SELF DECLARATION WITH RELEVANT SUPPORTING DOCUMENTS ○

IN CASE OF SALARY INCOME - SALARY SLIP, COPY OF FORM 16 ○

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Step 23_a.

End of KYC Process
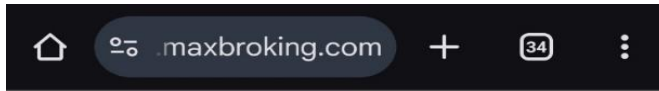
Thank you! Your online KYC process has been successfully completed.

Our team will now review your details and get in touch with you shortly for the e-signature and to complete the account activation process.

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-> This is the last page of process and it shows All account opening steps are successfully filled and submitted by client side.

-> Now Our Team will Review your details and contact you for Aadhaar OTP Based e-signature and to complete the account activation process.

-> If you have any query then feel free to ask at +91-9913027610 .