

## Old Bridge Asset Management Private Limited

Top-up

Yes

No

Registered Office: 1705, One BKC, C Wing, G Block, Bandra Kurla Complex, Bandra (East), Mumbai - 400051.

**SIP REGISTRATION FORM**First time investors, submit this form along with Common Application Form

FOR FIRST TIME INVESTORS FOR LUMPSUM INVESTMENTS / SIP INVESTMENTS.
PLEASE READ THE KEY INFORMATION MEMORANDUM. INSTRUCTIONS AND PRODUCT LABELLING BEFORE FILING OF THIS FORM.

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## **INSTRUCTIONS FOR SIP & TOP-UP**

- 1. OTM end date cannot be more than 40 years form the date of the mandate
- Investors are required to submit Form along with a photo copy/cancelled cheque of Debit Bank Account at least 21 days before the first SIP Installment date.
- 3. Please refer below table for minimum installments:

Frequency	Specified date	Min. amounts per installments	Min. number of installments
Daily	Daily	2500	6
Weekly	Any day (Monday to Friday)	2500	6
	(If no day is selected Monday will be the default day)		
Fortnightly	1st and 16th day of each month, as applicable*	2500	6
	(1st and 16th of the month will be the default date).		
Monthly (Default Frequency)	Any date (1st to 28th of the month)* (10th will be the default day)	2500	6
Quarterly	Any date (1st to 28th of the month)*	2500	6
	(10th will be the default date)		
Half Yearly	Any date (1st to 28th of the April & October)*	2500	6
	(10th will be the default date)		
Yearly	Any date (1st to 28th of the April)*	2500	6
	(10th will be the default date)		

- Note: For all schemes, minimum amount is as per above table and thereafter in multiple of ₹1.
- 4. "Investor shall have the option of choosing any date of the month as the SIP date except the dates 29th, 30th and 31st. If SIP date is not mentioned, default date would be considered as 10th of every month. If the SIP date falls on a non-business day or a bank holiday, the SIP debit will be processed on the following business day. "Will be triggered and processed only on Business Days. If the day opted falls on non-business day, it will be triggered and processed on the next business day.
- If no amount is mentioned minimum SIP installment amount would be considered.
- For details about the Scheme and its facility please refer the SID, SAI & KIM of the respective schemes/Addendumissued from time to time carefully before investing.
- The SIP will be discontinued automatically if payment is not received for three successive installments.
- Investors can discontinue a SIP at any time by sending a written request to any Official Point of Acceptance or to the registrar KFin Technologies Limited. Notice of such discontinuance should be received at least 20 days prior to the due date of the next installment/debit.
- Mandate will be processed through NACH platform offered by NPCI.

- 10. Investor will not hold Old Bridge Mutual Fund, its registrars and other service providers responsible if the transaction is delayed or not effected or the investor bank account is debited in advance or after the specific SIP date due to various clearing cycles of NACH Debit (Local/Bank holiday, Old Bridge Mutual Fund, its registrars and other service providers shall not be held responsible or liable for damages / compensation / loss incurred by the investor as a result of using the SIP or ECS. Jake debt facility, The investor assumes the entire risk of using this facility and takes full responsibility.
- 11. Investor can change bank details for SIP by submitting a "CHANGE OF BANK MANDATE FOR SIP" form available on the website or at any Investor Service Centre along with cancelled cheque of the new bank with the investor's name printed on it.
- 12. TOP-UP Facility: Under this facility the Investor can increase the SIP installment at pre-defined intervals by a fixed amount or any time as per the request. This facility is available for individual investors only. For availing the said facilities, investors are required to note the following:
  - Investor willing to register TOP-UP should provide the TOP-UP details along with the SIP enrolment details.
  - The minimum amount for Old Bridge TOP-UP facility is ₹ 500/- and in multiples of ₹ 1/- for all schemes.
  - If no amount is mentioned as TOP-UP amount under frequency yearly and half-yearly, minimum TOP-UP amount would be considered, i.e., ₹ 500/- for all schemes.
  - TOP-UP frequencies available are Half-Yearly/ Yearly/ Dynamic requested intervals.
  - $\bullet \quad \text{In case TOP-UP frequency is not indicated, it will be considered as Yearly by Default.} \\$
  - $\bullet \quad \mathsf{The\,date\,for\,Old\,Bridge\,Mutual\,Fund\,TOP-UP\,Facility\,will\,correspond\,to\,the\,registered\,\mathsf{SIP}}.$
  - TOP-UP will continue till the End of the SIP tenure by default.
  - In case an investor wishes to change the Top-Up amount, he/she has to provide a cancellation for the existing SIP and register fresh SIP.
  - Only TOP-UP cannot be discontinued anywhere during the SIP tenure.
  - Please see the illustration below to know how to calculate SIP Top-Up amount:
  - SIP Starts on 20/May/2025
  - SIP ends on 20/May/2065
  - SIPamountis₹2500
  - Top-Up amount is ₹500
    Top-Up Frequency is Half-yearly

Top-Up date	SIP Amount (₹)	Top-Up Amount (₹)	New SIP Amount (₹)
10-Nov-2025	2500	500	3000
10-May-2026	3000	500	3500
10-Nov-2027	3500	500	4000
10-May-2028	4000	500	4500

If Investor do not wish to opt for One Time Registration (OTM) Mandate, they can submit SIPNACH Registration Form available onwebsite www.oldbridgemf.com with SIP Registration Form.