

## Orange Club A/C Opening Package Terms and Conditions

These terms and conditions (“T&C”) outline the terms of the premium service offerings, referred to as Orange Club A/c Opening Package, which is in addition to the terms & conditions applicable to the customers for opening and maintaining Demat account with Sharekhan Limited (“Sharekhan”):

### Availability of the offerings

- All premium account opening service offerings are currently made available only in the cities of Mumbai, Navi Mumbai, Thane and Delhi (including NCR region).
- You agree and consent that not all the premium A/c Opening service offerings will be made available to you if you reside in a city other than ones mentioned above.

### Minimum capital

- Minimum capital required for you to avail the Orange Club A/c Opening Package is INR 10,00,000/-.

### Home/Workplace Visit for account opening

- You understand and agree that the visiting time to your premises shall be mutually agreed upon between you and the representative of Sharekhan. The meeting can be scheduled at any time in-between 10:00AM to 7:30PM on all 7 (seven) days of the week and shall be subject to the availability of Sharekhan’s representative.
- You agree that no aforesaid request would be fulfilled on a public holiday.
- You agree that the cancellation and re-scheduling of the meeting will only be allowed to a limit of three times.
- The home/workplace visit offering will be lapsed if you have cancelled the meeting beyond the number of times mentioned above.
- You agree to make available copies of pre-defined income statements/identity verification documents along with originals for in-person verification by Sharekhan’s representative, at the time of visit to your place for opening your Demat account.
- You further agree to abide by all the SEBI prescribed KYC norms, guidelines and other formalities as prescribed by the Prevention of Money Laundering Act, 2002 and the rules made thereunder for the account opening.

### Platform Demo at your place

- You agree that a representative from Sharekhan will offer a one-time platform demo as per your agreed and chosen location. The demo-meeting can be scheduled at any time in-between 10:00AM to 7:30PM on all 7 (seven) days of the week and shall be subject to the availability of Sharekhan’s representative.
- You agree that no aforesaid request would be fulfilled on a public holiday.
- You agree that the cancellation and re-scheduling of the demo-meeting will only be allowed to a limit of three times.
- The demo-meeting offer will be lapsed if you have cancelled the meeting beyond the number of times mentioned above.
- While Sharekhan’s representative will be carrying a laptop/tablet for conducting the demo of the trading platform at your location, you agree that you shall, as a back-up requirement, also have in possession and make available to Sharekhan’s representative with necessary secure access/hardware such as computer/laptop or such other device which shall allow Sharekhan’s representative to give a demo to you in a seamless manner.
- You agree to maintain in your premises working internet connectivity with internet speed requirements that is necessary for the seamless functioning of software/website or the application.
- Any concerns or queries regarding the trading platform should be addressed during and only at time of conducting the demo session You understand that Sharekhan’s representative will be required to follow Sharekhan’s prescribed internal norms and procedures to offer such demos and you agree to fully co-operate for the same.

### E-Meet an expert

- You can schedule an e-meet with an expert to clarify any queries you might have regarding the A/c Opening process. The expert may, based on your needs, provide you with personalised inputs, and may inform you of various products and services that Sharekhan has to offer.
- In case if you are in individual, you agree to participate in the e-meet in your own independent capacity, and in case if you are a non-individual, you agree to participate in the e-meet by your authorised representative.
- Expert availability is subject to their schedule, and appointments to be made at least 3 (three) days in advance. The stipulated advance-booking timeframe may be reduced depending upon the availability and acceptance of the expert.
- You agree that Microsoft Teams or such other Sharekhan prescribed application will be the dedicated application that will be used for E-meet.
- You agree that you have the necessary technological and network infrastructure to engage with the representative of Sharekhan for the e-meet. You will not hold Sharekhan liable for any technological and network infrastructural breakdowns from your-end.
- You agree that the cancellation and re-scheduling of the e-meet by you will only be allowed twice. The E-meet an expert offering will be lapsed if you have cancelled the e-meeting beyond the number of times mentioned aforesaid.
- You agree that the opinions expressed by the expert in e-meet towards your portfolio/ investment ideas are merely suggestive in nature and does not form any binding authority on either of the parties and shall not be construed to be an investment advice or recommendation. You agree and accept that any decision towards investment made towards any scrip/security or bond shall be solely yours and the proceeds of such investments thereof depends on the market conditions and associated risks thereof.
- You are aware that neither Sharekhan nor any of its employees or associates are permitted to assure/promise you any guaranteed returns on any your investment whatsoever. You are requested to immediately respond to us if any assurance/promises are made to you for any guaranteed returns on any your investment whatsoever.
- Any investment related views or opinions expressed by the expert is based on careful analysis, research and based on your risk appetite. However, it is important for you to acknowledge that all investments carry inherent risks, and past performance does not in indicate future results. While our expert’s investment views and opinions, if any, are made in good faith, Sharekhan cannot guarantee specific outcomes or be held responsible for any financial losses incurred. Sharekhan is not responsible for any loss, delay or any change in the market conditions that may result in the investment period. It is recommended that you consult your qualified financial professional before making any investment decisions.

### Priority Account Opening

- A priority account opening, and activation is applicable to both individual and non-individual accounts.
- The timeline towards completion of the account opening through priority A/c Opening may vary and will depend on various internal and external factors that are not attributable to us.
  - Internal factors include but are not limited to document verifications/processing which are subjected to the accuracy, truthfulness and completeness of the information shared by you or any other factors for which the cause of delay is not attributable to us; and
  - External factors include but are not limited to regulatory compliance, clearance from regulatory authorities like KRA, UIDAI, NSDL, CDSL towards verification of personal - Aadhar Verification, PAN verification, updation of details by KRA – KYC Registration Agency or any other factors for which the cause of delay is not attributable to us.
- You agree that, availing premium service offerings does not guarantee account opening. Any failures or delays may be attributed to any lapses in providing the KYC details, which shall include Name/ Surname/PAN/AADHAAR/ Bank details, signature mismatch, in-person verification failures and or any other additional document/s if any required during the account opening process depending upon cases to case basis. You are requested to note that failures resulted from submitting forged and/or illicit document(s) for account opening will result in us taking appropriate action against you.

### Additional terms

- The timeliness of the offerings does not account for any delays that may be caused by the regulators with respect to all the verification and other account opening procedures or any other instances which are not attributable to Sharekhan and/or its representatives.
- Sharekhan reserves the right to modify or discontinue any of the premium service offerings from the Orange A/c Opening Package without prior notice.
- All the information and KYC documents provided for and at the time of account opening are accurate, complete, and true. Any false information may lead to rejection of account opening.
- In case if you are a non-individual, you agree to provide board resolutions or other necessary valid documents authorising the authorised representative to carry all such activities as may be necessary for you to avail the Orange Club A/c Opening Package and the brokerage services or any other services offered by Sharekhan.
- The premium service is provided as an enhancement to the standard service offering and are not guaranteed to result in any specific outcomes.
- You acknowledge that the A/c Opening process is subject to regulatory clearances and may involve identity verification procedures.
- You agree that for any services that you undertake in your own personal capacity, other than for the Orange Club A/c Opening Package and the brokerage services or any other services offered by Sharekhan, with any representative of Sharekhan as private arrangement, shall solely be your responsibility and you agree not to hold Sharekhan liable or responsible for the same.
- You agree that any renewal requirement for any brokerage discounting schemes that may be offered to you pursuant to and resulting from opting Sharekhan’s services, shall be carried out based on your clear and explicit renewal instructions. While Sharekhan will provide you renewal reminders either by SMS or by an email on your registered mobile number or email id, it shall be your sole responsibility to make a request for the renewal of such schemes and pay the applicable charges for such renewal respectively. If you are unable to provide us with a renewal request and pay the applicable charges accordingly, you will be charged with the standard brokerage rates as mentioned on Sharekhan’s website.

### General Terms

- By accepting the T&C you authorize Sharekhan, its representatives & agents to provide information about various products, offers and services provided by Sharekhan through any mode including telephone calls, SMS, e-mail, letters & any other mode of communication. You also confirm that laws in relation to unsolicited communication referred in “National Do Not Call Registry” as laid down by “Telecom Regulatory Authority of India” will not be applicable for such information/ communication.
- Indemnity: You agree to indemnify and hold harmless Sharekhan and its representatives from any claims, losses, damages, liabilities, and expenses arising out of your availing of the premium services or any breach of these T&C
- Governing law and jurisdiction: These T&C shall be governed by and construed in accordance with the laws of India and shall be subject to the exclusive jurisdiction of courts at Mumbai, India.
- In case of any further queries with respect to the availing of your Orange Club A/c Opening Package, you can write to us at [myaccount@sharekhan.com](mailto:myaccount@sharekhan.com)
- By availing of any of the premium services mentioned above, you acknowledge that you have read, understood, and agreed to abide by these T&C.
- For any grievance or complaints, you can contact us on [igc@sharekhan.com](mailto:igc@sharekhan.com) and also refer to the Escalation Matrix available on our website under the “Contact us” tab.

To see brokerage charges and T&Cs related to it please click [here](#)

\*Account opening charges are NIL. There is no AMC charged on Demat account for the first year. All other charges will apply as per agreed tariff rates\*

**Registered Office Address:** Sharekhan Limited, The Ruby, 18th Floor, 29 Senapati Bapat Marg, Dadar (West), Mumbai 400 028, Maharashtra, India. Tel: 022-67502000.

**Correspondence Address:** 10th Floor, Gigaplex Bldg. No. 9, Raheja Mindspace, Airoli Knowledge Park Rd, MSEB Staff Colony, TTC Industrial Area, Airoli, Navi Mumbai, Maharashtra 400708, India. Tel: 022 61169000 / 61150000, Fax no. 61169699

**Sharekhan Ltd.:** SEBI Regn. Nos.: BSE / NSE (CASH / F&O / CD) / MCX - Commodity: INZ000171337; DP: NSDL/CDSL-IN-DP-365-2018; PMS: INP000005786; Sharekhan Ltd. (AMFI-registered Mutual Fund Distributor) Mutual Fund: ARN 20669 (valid till 02/07/2026); Research Analyst: INH000006183; IRDAI Registered Corporate Agent (Composite) License No. CA0950, valid till June 13, 2027. For any complaints, email at [igc@sharekhan.com](mailto:igc@sharekhan.com).

**Compliance Officer:** Ms. Binkle R. Oza; Email ID: [complianceofficer@sharekhan.com](mailto:complianceofficer@sharekhan.com); Tel: 022 62263303.

**Disclaimer:** Investment in securities market are subject to market risks, read all the related documents carefully before investing. Please refer the Risk Disclosure Document issued by SEBI and go through the Rights and Obligations and Do’s and Dont’s issued by Stock Exchanges and Depositories before trading on the Stock Exchanges. For commodities derivatives, please note that Commodities Derivatives are highly leveraged instruments. PMS is not offered in Commodity Derivative Segment by Sharekhan Limited. Before investing in the asset class consider your investment objectives, level of experience and risk appetite carefully. Brokerage will not exceed SEBI prescribed limit.  
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**Mutual funds disclaimer:** Mutual Fund investment are subject to market risk. Read all the scheme related documents carefully before investing. For more details click here

For Portfolio Management Services - The value of the portfolio investments may be affected generally by factors affecting financial markets, such as price and volume, volatility in interest rates, currency exchange rates, changes in regulatory and administrative policies of the Government or any other appropriate authority (including tax laws) or other political and economic developments. Consequently, there can be no assurance that the objective of the Portfolio would achieve. The value of the portfolios may fluctuate and can go up or down. The inability of the Portfolio Manager to make intended securities purchases due to settlement problems could cause the portfolio to miss certain investment opportunities. No claims may be made or entertained for any variances between the performance depictions and individual portfolio performance. Neither the Portfolio Manager nor Sharekhan, its Directors, Employees or Sponsors shall be in any way liable for any variations noticed in the returns of individual portfolios. The Client shall not make any claim against the Portfolio Manager against any losses (notional or real) or against any loss of opportunity for gain under various PMS Products. There is no assurance or guarantee that the objectives of the portfolio will be achieved. Please note that past performance of the financial products, instruments and the portfolio does not necessarily indicate the future prospects and performance thereof. Portfolio Manager’s investment decisions may not be always profitable, as actual market movements may be at variance with anticipated trends. The investors are not being offered any guaranteed or assured returns. The services are not directed or intended for distribution to, or use by, any person or entity who is a citizen or resident of or located in any locality, state, country or other jurisdiction, where such distribution, publication, availability or use would be contrary to law, regulation or which would subject the Sharekhan and affiliates to any registration or licensing requirement within such jurisdiction.