

SIP on WhatsApp

Introducing 'SIP on WhatsApp', a unique and most convenient way to start your SIP (Systematic Investment Plan). To get started, follow the below steps:

Step 1: Login to **MO Investor Web** using your client code/ Email ID/ Mobile number and password

Step 2: Select **SIP on WhatsApp** from above the main menu

Step 3: Click on **CONNECT** to receive an SMS on your registered mobile number with link for activating SIP on WhatsApp

Step 4: Click on the link sent in the SMS to **activate SIP on WhatsApp Bot**

Note: To start your SIP, your registered mobile number should also be registered with WhatsApp

On Single Click on **Link**, system will take user to WhatsApp with prepopulate ROBO message i.e " Hello "

Whatsapp Bot will Auto prepopulate Message, once customer will click on Link (Text message receive

Hello

12:51 PM

Greeting from Motilal Oswal

To enjoy **Whatsapp Option** , You need ensure following instruction :)

@ You have added this number to your contacts.

@ You cannot share link or whatsapp who is not having broking account with Motilal Oswal.

@ Click Here for **Link** and agree to receive notifications from **MO-WhatsApp Robo**.

To proceed Please select Option ?

1. I agree
2. I don't agree

Note : Type the option no or text to get response . For example 1. I agree Simply type " 1 " or Text " I agree "

12:52 PM

Ok

Sorry...! You have enter wrong value :(

Type the option no. or text to get response . For example 1. Yes, I agree Simply type " 1 " or Text " Yes" Or " I agree " Or " Yes, I agree "

12:54 PM

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Thanks for the confirmation !

Client Name : Prashant Dattaram Naidu

Client Code : T09802

Available Bal : 10000

Please select AMC

1. Motilal Oswal Mutual Fund
2. HDFC Mutual Fund
3. ICICI Prudential Mutual Fund
4. AXIS Mutual Fund
5. Reliance Mutual Fund

Note : Type the option no. For example 1. Motilal Oswal Mutual Fund , Simply type " 1 " or " Motilal Oswal Mutual Fund ".

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Message will prepopulate on basis of Client Type in system.

Please Select Category Name

1. Equity
2. Balanced
3. Debt

Note : Type the option no. For example 1. Equity, Simply type " 1 " or Type " Equity ".

Type < **Menu** > to return Main Menu or Type < **Back** > to return AMC Selection.

From Back end system will

System should response ... Like Sorry...! if user enter wrong value and give response to enter correct value which

1

Please Select Scheme Name

1. MOTILAL OSWAL MOST FOCUSED MIDCAP 30 FUND - Growth
2. MOTILAL OSWAL MOST FOCUSED MULTICAP 35 FUND - Growth
3. MOTILAL OSWAL MOST FOCUSED 25 FUND - Growth
4. MOTILAL OSWAL MOST FOCUSED LONG TERM FUND - Growth
5. MOTILAL OSWAL ULTRA SHORT TERM BOND FUND - Growth

Note : Type the option no. For example 1. MOTILAL OSWAL MOST FOCUSED MIDCAP 30 FUND - GROWTH , Simply type " 1 " or Type " MOTILAL OSWAL MOST FOCUSED MIDCAP 30 FUND - Growth "

Type < **Menu** > to return Main Menu or Type < **Back** > to return

System should response ... Like Sorry...! if user enter wrong value and give response to enter correct value which is maintained in Master.

1

Please Select SIP Amount , Day of SIP , No of Installments

Min Amt = 100 / **Max Amt** = 199999

Day of SIP = 1,2,3,4,5,6,7,8,9,10,11,12,13,14,15,16,17,18,19,20,21

Min Install = 60 / **Max Install** = 999

For example :- 1000/2/24

(System will validate as per Scheme Master)

Type < **Menu** > to return Main Menu or Type < **Back** > to return Mandate Selection.

01:03 PM

Default Frequency as Monthly

500 27 24

System should response ... Like Sorry...! if user enter wrong value and give response to enter correct value which is maintained in Master.

Sorry! you have entered wrong SIP Date Value . So Please enter correct value to proceed.

Please Select SIP Amount , Day of SIP , No of Installments

Min Amt = 100 / **Max Amt** = 199999

Day of SIP = 1,2,3,4,5,6,7,8,9,10,11,12,13,14,15,16,17,18,19,20,21

Min Install = 60 / **Max Install** = 999

For example :- 1000/2/24

(System will validate as per Scheme Master)

Type < **Menu** > to return Main Menu or Type < **Back** > to return Scheme Selection.

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System should response ... Like Sorry...! if user enter wrong value and give response to enter correct value which is

500 2 24

MFI

MFD

Congratulation Your xSIP has been successfully registration with ID < 292929 > . You can login in web site and check your Transaction in Order Book.

IMP Note : Please note that system will send Preprinted NACH Mandate PDF to your registered email ID, You need to take a print out and duely signed NACH Mandate Copy need to courier to Motilal Oswal Tower , 4th Mutual Fund Operation Department , Junction of Gokhale & Sayani Road , Prabhadevi , Mumbai 400025

System will considered default (GFOT) "Generate First Order Today" , accordingly 1st Installement amount will be debit from your Ledger Account.

You may call our customer service on 91-22-39982515 , write to us at query@motilaloswal.com. If you have further query.

Type < **Menu** > If you want to do another tranaction.

01:04 PM

Separate message will be popup - It there is issue in BSE IML Disconnect. It will ask recheck after sometime (Applicable both the option - Fresh registration and cancellation)

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System will considered default (GFOT) "Generate First Order Today" , accordingly BSE system will send one Link for making Online Payment.

You may call our customer service on 91-22-39982515 , write to us at query@motilaloswal.com. If you have further query.

Type < **Menu** > If you want to do another tranaction.

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Separate message will be popup if trax will be trigger after cutoff mean on T+1 Day. (Applicable both the option - Fresh registration and

Congratulation Your AMO (After Market Order) xSIP has been successfully registration with ID < 292929 > . You can login in web site and check your Transaction in Order Book.

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System will considered default (GFOT) " Generate First Order Today " on Next working day . accordingly 1st Installement amount will be debit from your Ledger Account.

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