



Welcome to Mutual Fund Utilities

MFU

A solid blue horizontal bar spans the width of the slide at the bottom.

MFU Corporate Structure

Conceptual Basis

- A SEBI Regulated Entity
- Owned by Asset Management Companies
- Operated as a “Shared Services” initiative by MF Industry

Objectives

- Convenience for Distributor/RIA, Fund Houses and Investors
- Consolidation of information
- Cost efficiencies through operational uniformity

MFU – Increasing Popularity

Customer Profile

- Distributors
- RIAs
- Platforms
- Investors
- Corporates
- Custodians

Numbers speak

- Half a Million Accounts opened
- Daily five hundred plus opened
- Regularly touching Ten thousand transactions in a day
- Regularly crossing Thirty thousand cr plus value in a day
- More than one thousand SIPs opened daily

MFU – The Competitive Advantage

The Differentiators

- Technological Advantage
- Folio Mapping benefits
- Convenient Master Data Maintenance
- Real Time tracking of Transactions
- Real Time tracking of Credit flow
- Unique products like PayEezz, CaST, CaRT

AGGREGATE is the Advantage

Common *A*ccount *N*umber (CAN)

Conceptual Basis

- Convenience of a Single Account across the industry
- Universal Folio across the industry
- Existing Folios across Fund Houses linked/mapped to CAN

Methodology

- Investor Category i.e. Individual, HUF, Company, Body Corporate, etc
- Order of holding i.e. A; A&B; A,B&C; B; B&A; B,C&A; C; C&B; C,A&B;.
- Mode of holding i.e. Single, Joint and Anyone or Survivor.
- Social (Tax) Status i.e. Resident, Non-Resident (NRI-NRE; NRI-NRO) etc.

Common *A*ccount *N*umber (CAN)

Creating CAN

- Convenient electronic online mode - eCAN
- Completely Paperless
- Account Opened on the fly
- No need to submit any physical document
- No need to visit any office

Common *A*ccount *N*umber (CAN)

Creating CAN for customers



- Five min process for an IFA to create CAN for their Investor
- Limited Data Entry fields such as Name, PAN, Bank Details, Nominee, FATCA, UBO - as remaining data pulled from KRA
- Only two document images required to be Uploaded (self attested PAN and bank proof)
- Account approved within 24 Hours
- Investor name should match with the name in KRA

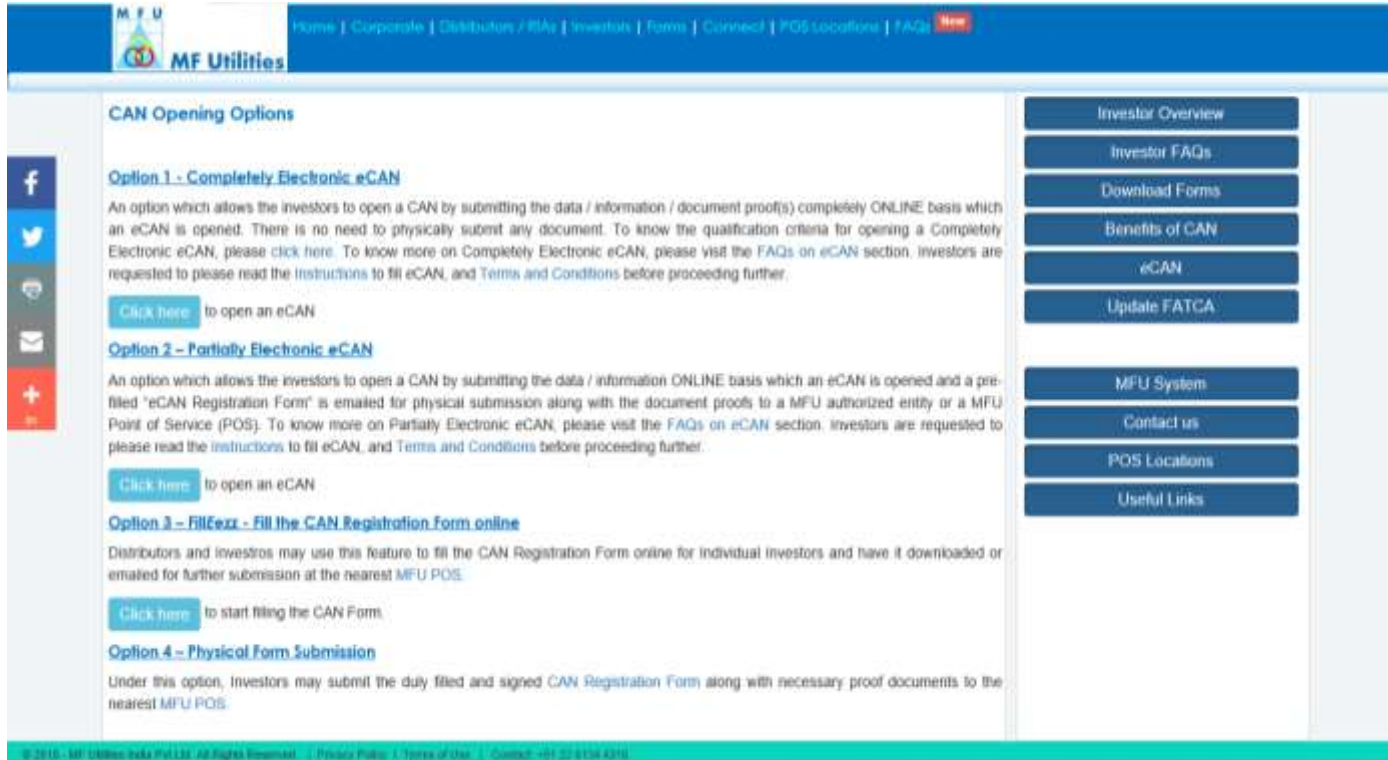
Common Account Number (CAN)



Creating CAN for
KRA compliant investors

- On the website
- www.mfuindia.com
- The right hand widget

Common Account Number (CAN)



The screenshot shows the MFU Utilities website with a navigation menu at the top. The main content area is titled "CAN Opening Options" and lists four options:

- Option 1 - Completely Electronic eCAN**: An option which allows the investors to open a CAN by submitting the data / information / document proof(s) completely ONLINE basis which an eCAN is opened. There is no need to physically submit any document. To know the qualification criteria for opening a Completely Electronic eCAN, please click here. To know more on Completely Electronic eCAN, please visit the FAQs on eCAN section. Investors are requested to please read the Instructions to fill eCAN, and Terms and Conditions before proceeding further. [Click here](#) to open an eCAN.
- Option 2 - Partially Electronic eCAN**: An option which allows the investors to open a CAN by submitting the data / information ONLINE basis which an eCAN is opened and a pre-filled "eCAN Registration Form" is emailed for physical submission along with the document proofs to a MFU authorized entity or a MFU Point of Service (POS). To know more on Partially Electronic eCAN, please visit the FAQs on eCAN section. Investors are requested to please read the Instructions to fill eCAN, and Terms and Conditions before proceeding further. [Click here](#) to open an eCAN.
- Option 3 - Filltext - Fill the CAN Registration Form online**: Distributors and investors may use this feature to fill the CAN Registration Form online for individual investors and have it downloaded or emailed for further submission at the nearest MFU POS. [Click here](#) to start filing the CAN Form.
- Option 4 - Physical Form Submission**: Under this option, investors may submit the duly filled and signed CAN Registration Form along with necessary proof documents to the nearest MFU POS.

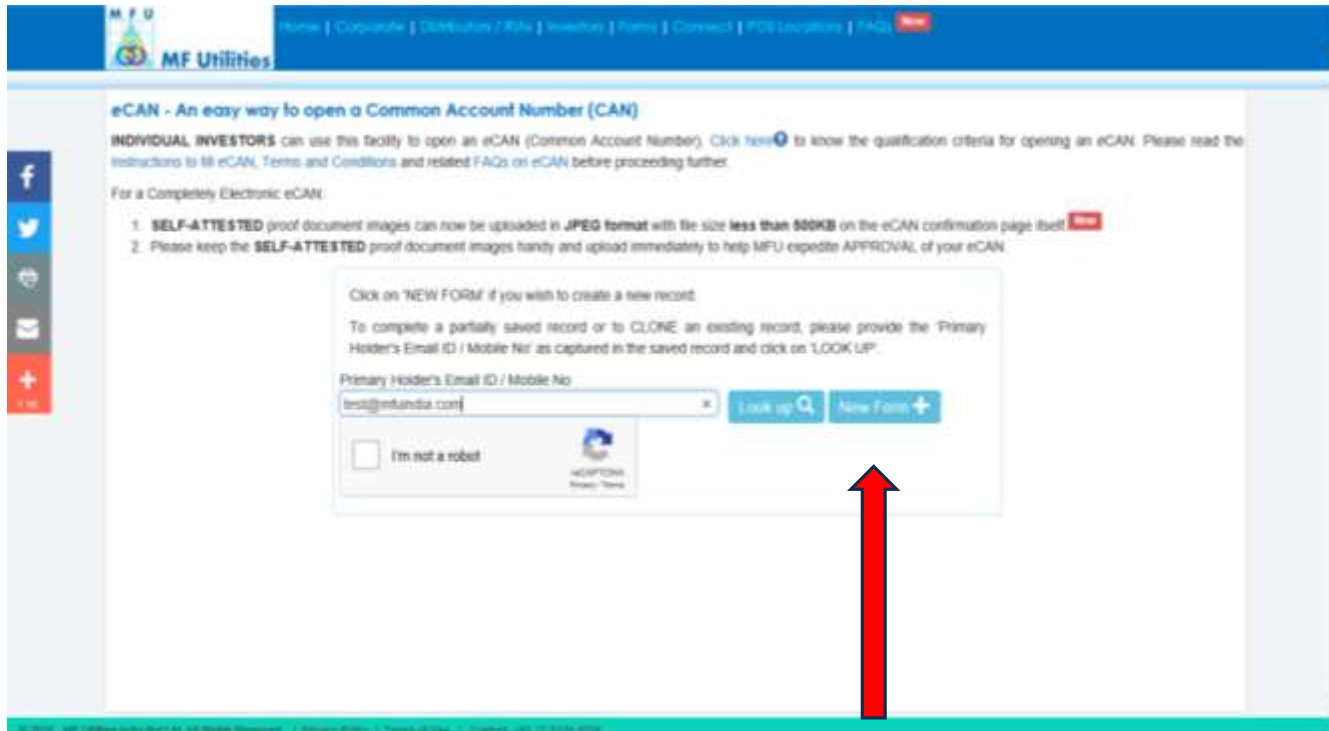
On the right side of the page, there is a vertical menu with the following items: Investor Overview, Investor FAQs, Download Forms, Benefits of CAN, eCAN, Update FATCA, MFU System, Contact us, POS Locations, and Useful Links.

Selecting the best option

- Completely electronic
- Physical

Select Option One for an electronic paperless experience

Common Account Number (CAN)

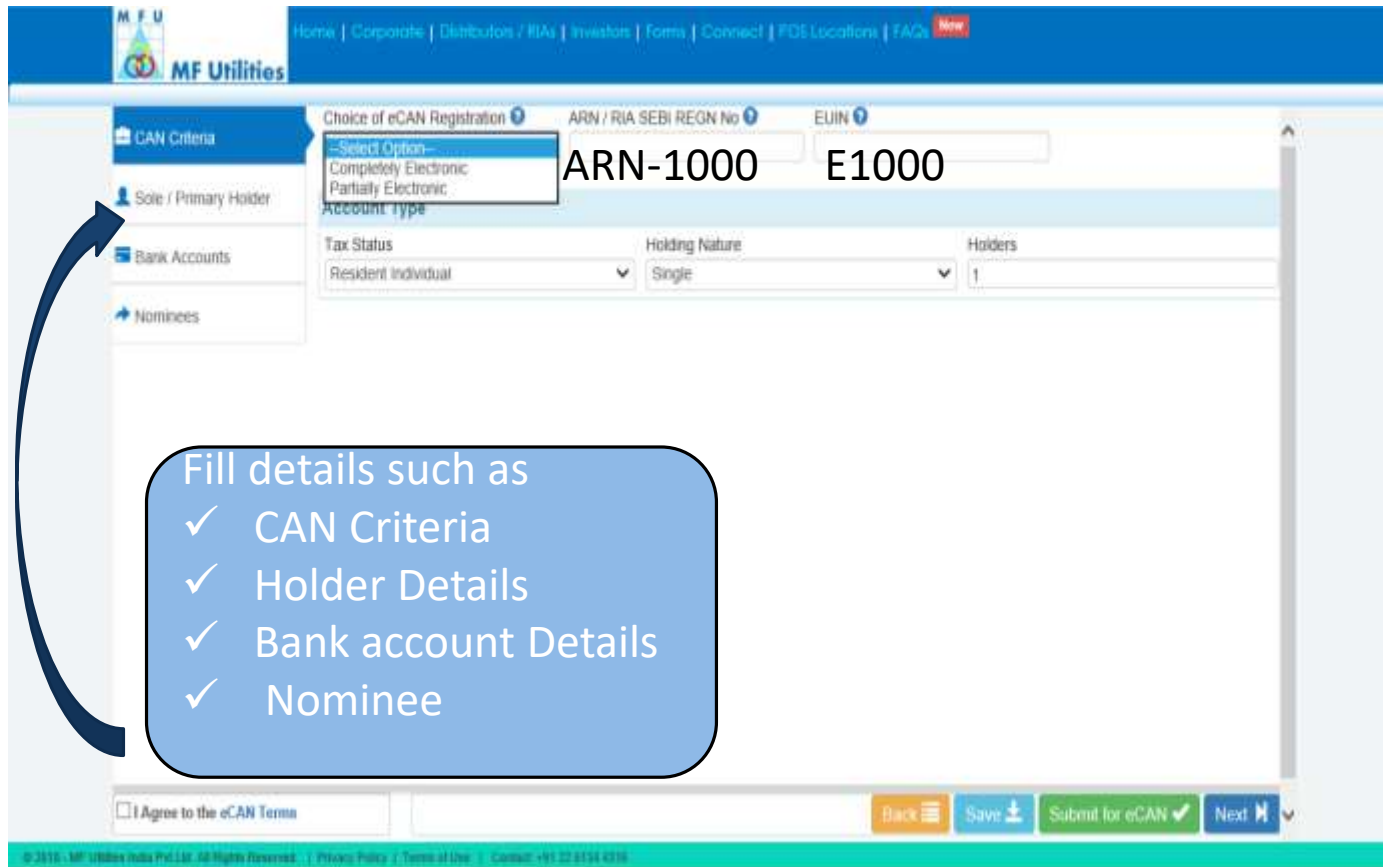


Getting started, or restarted

- New Form to start fresh
- Look Up to restart or for cloning data for new account

Security validation for a safe experience

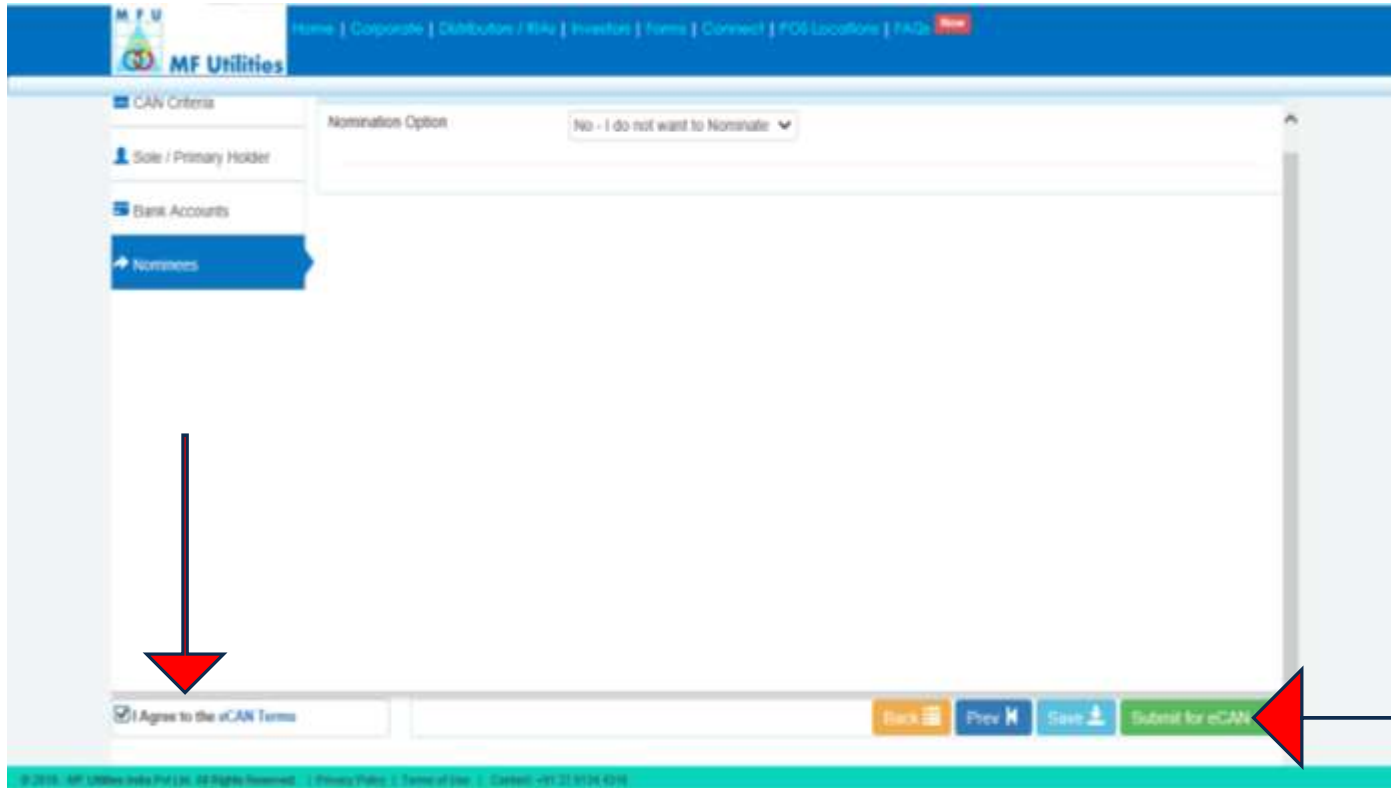
Common Account Number (CAN)



Fill it up in a flash

- ARN details to identify the distributor who onboarded the account holder
- The Master details
- Basic information of the customer

Common Account Number (CAN)



Finish it

- Click on T&C
- Click Submit to finish
- Information filled now saved in the database
- It can be retrieved later by the creator for cloning the data in case new account is to be opened

Common Account Number (CAN)



Confirmation

- Instantaneously a Provisional Common Account Number (CAN) is generated
- This CAN is the universal folio number, offers the convenience of transaction across the industry
- Images need to be uploaded (self-attested PAN and bank proof)

Common Account Number (CAN)

CAN PROOF UPLOAD
✕

Please ensure that you upload all the required document proofs in one-go as you will not be permitted to upload any document images once the CAN data is VERIFIED at MFU.

CAN: 18358Q202P

+ Add files...

| Image Preview | Image Name | Image Size | Proof Type | Status | Options |
|--|------------|------------|------------|--------|---------|
| <p>Note: The allowed image file formats (GIF, JPG JPEG, PNG, BMP). Recommended file size should not be more than 500 KB.</p> | | | | | |

Close

Images

- Can be uploaded immediately or later
- Until images are uploaded the CAN is Provisional
- Max. image size 500 kb
- Only two images required (self-attested PAN and bank proof)

Common Account Number (CAN)



Matter of Time, short time

- MFU Team verifies the information provided
- MFU Team verifies the images uploaded
- CAN Approved
- Ready to Transact
- Across the industry
- Enjoy the benefits of Aggregation

One Time

- Offered by MFU as *PayEezz*
- Offered in physical and online modes
- Used to make subscription payments for Lump Sum, SIP or CaST
- Mandate limit applicable at Per transaction level.

One Place

- Leverages the Aggregation Benefits instead of submitting in every AMC
- *PayEezz* enables payments across Fund Houses using a single Mandate
- Ease of Registering and Ease of Monitoring
- One Mandate, at One Place that is MFU – used across the industry

Swap PayEezz

Enhancement

- To help customers replace old mandates with new mandates without cancelling existing SIP
- To help customers consolidate their mandates for better control
- Change of Debit Bank in running/on-going SIP

In short make changes in ***Chaltee*** SIP

Swap PayEezz

CAN Name: [REDACTED] AR Group Order No. [REDACTED]

| Scheme Name | Div. Option | Frequency | Instalment Date/Day | Txn. Vol. Type | Txn. Vol | New Folio |
|--|----------------|-----------|---------------------|-----------------|----------|-----------|
| Axis Long Term Equity Fund - Direct Growth | Not-Applicable | Monthly | 20 | Specific Amount | 1,000.00 | Yes |

Start Date : Nov-2018 End Date : Oct-2021 Folio No: [REDACTED]

Total Order Amount : 1,000.00

Existing Mandate Details

| Old bank | Branch | CAN PRN List* | New bank |
|---|------------------------|---------------|--|
| Acc. No.: 340010142670 | ANAKAPALLE | [REDACTED] | Bank Name: KOTAK MAHINDRA BANK LIMITED |
| IFSC: KKBK0007812 | MICR: 530485102 | | Branch: ANAKAPALLE |
| Max Amt.: 1,000.00 | PRN: [REDACTED] | | Acc. No.: 340010142670 |
| End Date: 24-10-2021 | Start Date: 24-10-2018 | | MICR: 530485102 |
| | Perpetual No | | IFSC: KKBK0007812 |
| | Flag: | | PRN: [REDACTED] |
| Maximum Amount : Rupees One Thousand only | | | Max Amt.: 3,00,000 |
| | | | Start Date: 28-01-2019 |
| | | | End Date: |
| | | | Perpetual Yes |
| | | | Flag: |
| | | | Maximum Amount : Rupees Three Lakhs only |

Please note : Swapped PayEezz will be effective for instalments falling due on or after 8 Calendar days

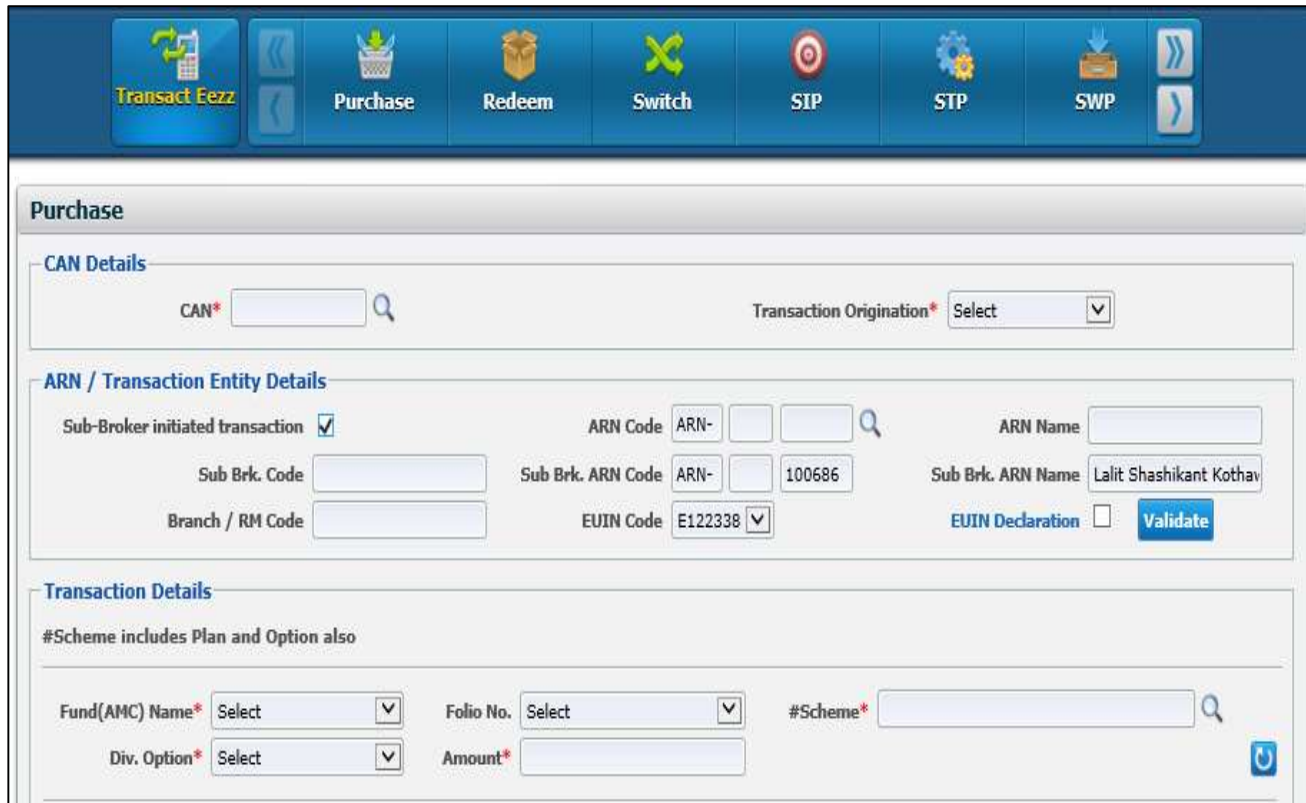
Submit Close

How to SWAP

- Distributor logs in BO
- Systematic Order Book
- Against every SIP GORN
- Icon for SWAP PayEezz,



ARN Swipe

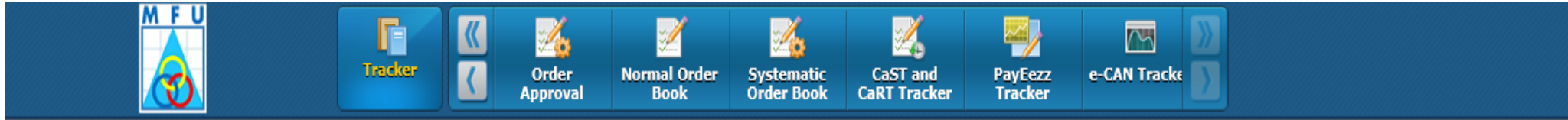


- Initiate transaction under other ARN
- Sub-broker can use MFU even if main broker not signed up with MFU
- Transaction can be initiated for multiple ARNs under the same login

The **DIIL** Philosophy in action

- Distributors Initiate Account Opening for customers
- Track the Account Opening in real time
- Distributors Initiate transactions on behalf of customers
- Track the transaction flow in real time
- Distributor Initiated Investor Login (**DIIL**) with ARN hardcoded

Real Time Tracking – Account Opening



e-CAN Tracker

CAN PAN/PEKRN Registration Mode Registration Status Sort Order / Type [Browse](#)

| CAN | Name | PAN/PEKRN | Inserted Time Stam | Last Modified Time | Modified User | Status | Mode | Entity ID | Entity Name | Options |
|-------|-----------------------|-----------|---------------------|---------------------|---------------|-----------|------------|-----------|--------------------|---------|
| 19005 | RAHUL VIJAY WANI | AC | 05-01-2019 17:44:26 | 07-01-2019 16:23:04 | 1801110000U | Pending | Physical | 500001 | MF Utilities India | |
| 17203 | ASHOK ZIPRU AMRUTKAR | AB | 22-07-2017 23:30:58 | 09-10-2018 17:35:36 | SYSTEM | Cancelled | Physical | 500001 | MF Utilities India | |
| 16355 | PRASHANT PRAKASH RESH | BB | 20-12-2016 00:50:12 | 25-08-2018 10:51:51 | SYSTEM | Cancelled | Physical | 500001 | MF Utilities India | |
| 18216 | GANESH DATTATRAY PATH | BB | 04-08-2018 13:29:36 | 24-08-2018 10:40:29 | SYSTEM1 | Cancelled | Electronic | 500001 | MF Utilities India | |
| 17169 | SACHIN MORESHWAR SHIF | DN | 18-06-2017 19:36:03 | 04-08-2018 12:21:25 | SYSTEM | Cancelled | Electronic | 500001 | MF Utilities India | |
| 18086 | SUNITA ASHOK AMRUTKAR | AN | 27-03-2018 20:30:11 | 04-08-2018 00:04:12 | SYSTEM | Pending | Physical | 500001 | MF Utilities India | |
| 18122 | SURESH P NAIR | AG | 02-05-2018 13:14:00 | 11-05-2018 16:46:52 | 18113100007 | Pending | Physical | 500001 | MF Utilities India | |
| 18074 | ADITYA A CHAVAN | AG | 15-03-2018 08:36:03 | 22-03-2018 10:04:28 | 17039100009 | Pending | Physical | 500001 | MF Utilities India | |

e-CAN Tracker for Tracking online CAN created by IFA / RIA


























Real Time Tracking - Account Opening


Tracker
KYC Tracker
CAN Tracker
Order Approval
Normal Order Book
Systematic Order Book
CaST and CaRT Tracker

CAN Tracker

Branch Level: My Level
 Registration Status: All




Category: ALL
 CAN:
 PAN/PEKRN:








| CAN | Name | Category | ARN Code | ARN Name | Sub Brk. ARN Cc | PAN/PEKRN | Last Modified Time | Modified User | Registration statu | Options |
|------|------------------------|------------|----------|------------|-----------------|------------|--------------------|---------------|--------------------|---|
| 1803 | PRASAD SADASHIV GUNJAL | Individual | ARN-10 | ashikant K | | ALJPG7744F | 04-09-2018 20:57:5 | SYSTEM | Approved |      |
| 1803 | SAKSHI SANTOSH GHOGALE | Individual | ARN-10 | ashikant K | | ASIPG8590M | 04-09-2018 07:08:5 | SYSTEM | Approved |      |
| 1803 | MANGAL SUNIL GHATNEKAR | Individual | ARN-10 | ashikant K | | AEIPG0144B | 18-01-2018 19:32:3 | 16058500001 | Rejected |      |
| 1730 | KOLLURI CHAITANYA VANI | Individual | ARN-10 | ashikant K | | ANKPK7607C | 02-09-2018 04:02:4 | SYSTEM | Approved |      |
| 1730 | Sekhar Jagarlamudi | Individual | ARN-10 | ashikant K | | AHRPJ6482D | 21-11-2017 16:10:1 | 15344100001 | Suspended |      |

Status and information related to (physical) CAN along with Scan image of Form

Real Time Tracking - Dashboard

Welcome KOTHAWADEL - KOTHAWADELALIT Time : 22:54:54 LALIT SHASHIKANT KOTHAWADE

Pending Approval

| Transactions | Physical | | TransactEezz | |
|------------------|-----------|----------|--------------|----------|
| | My Branch | My Level | My Branch | My Level |
| Purchase | | | | |
| Redeem | | | | |
| Switch | | | | |
| SIP | | | <u>1</u> | <u>1</u> |
| SWP | | | | |
| STP | | | | |
| SIP Cancellation | | | | |
| SWP Cancellation | | | | |
| STP Cancellation | | | | |
| Total | | | 1 | 1 |

KYC,CAN & PayEezz Pending Approval

| | My Branch | My Level |
|--------------|-----------|----------|
| KYC | | |
| CAN | <u>1</u> | <u>1</u> |
| PAYEezz | | |
| Total | 1 | 1 |

Tracker – track CAN, Mandate & Transaction

TransactEezz – For Online Transaction

General – For Investor login and CenCoM

Distributor Initiated - Transactions



Purchase

CAN Details
 CAN: [REDACTED] Transaction Origination*: Select
 CAN KYC Status: Approved Primary Holder: MA [REDACTED] S-KRA

ARN / Transaction Entity Details
 Sub-Broker initiated transaction: ARN Code: ARN-100696 ARN Name: Lalit Shashikant Kothav
 Sub Brk. Code: Sub Brk. ARN Code: ARN- EUN Code: E122338 EUN Declaration: Validate

Transaction Details
 #Scheme includes Plan and Option also
 Fund(AMC) Name*: ADITYABIRLASFUNLIFE Folio No.: 1017497040 #Scheme*: Aditya Birla Sun Life Frontline Equity Fund - View Load Details
 Div. Option*: Not-Applicable Amount*: 10000 Rupees Ten Thousand only
 Fund(AMC) Name*: Select Folio No.: Select #Scheme*:
 Div. Option*: Select Amount*:
 Fund(AMC) Name*: Select Folio No.: Select #Scheme*:
 Div. Option*: Select Amount*:
 Total Order Amount: 10000.00 Add Scheme Row
 Rupees Ten Thousand only

Depository Account Details
 Allot in Depository: Depository: Select Client ID:

Payment Details
 Payment Type*: Select Source Account No.*: Select View Bank Details
 NEFT/RTGS Transfer done UTR Ref. No.: Payment Date: 10-01-2019
 Beneficiary A/C No: Select Amount to Transfer: 10000.00 Rupees Ten Thousand only

Please note : Payment (other than payment type 'PayEezz') should be made within 24 hours from the date of executing the transactions, else transactions will be liable to be rejected. In case of physical payment, the Cheque have to get deposited in the immediate next available clearing.

Submit Reset

The DIIL Philosophy in action

- Initiate ALL kinds of transactions
- Transactions approved by investors
- Payment link initiated for subscription transactions

Distributor Initiated – Transactions – Real Time Tracking

Stage by Stage Tracking – online transactions

- Order Requested – Event Date & Time Stamp (27-12-2018 13:35:46)
- Order Approved (by investor) – Event Date & Time Stamp
- Sent to RTA – Event Date & Time Stamp
- RTA Accepted – Event Date & Time Stamp
- RTA Processed / Rejected – Event Date & Time Stamp

Removes All uncertainty for better Customer Servicing

Distributor Initiated – Transactions – Real Time Tracking

| Order History | | | | | |
|---|------|-----------------------------------|---------------------|---|------------------------------|
| Group Order No | ITRN | Event | Event Date Time | Entity ID / Name | Event User Code / Name |
| 15290QZA10000192 | | Order Requested | 14-12-2017 13:11:54 | 400240 LALIT SHASHIKANT KOTHAWADE / LALIT SHASHIKANT KOTHAWADE | 1508940000T / KOTHAWADELALIT |
| Remarks To RTA : | | | | | |
| 15290QZA10000192 | | Investor Confirmed | 14-12-2017 13:17:36 | MFU MF Utilities India Pvt. Ltd. / MF Utilities India Pvt. Ltd. | SYSTEM2 / SYSTEM2 |
| Remarks To RTA : | | | | | |
| Internal Remarks : [MANISH DANGRA Accepted via Email link sent to manishdangra@gmail.com] | | | | | |
| 15290QZA10000192 | | Payment Initiated | 14-12-2017 13:17:36 | MFU MF Utilities India Pvt. Ltd. / MF Utilities India Pvt. Ltd. | SYSTEM2 / SYSTEM2 |
| Remarks To RTA : | | | | | |
| 15290QZA10000192 | 01 | Sent to RTA | 14-12-2017 13:26:37 | | SYSTEM / SYSTEM |
| Remarks To RTA : Sent to RTA | | | | | |
| 15290QZA10000192 | 01 | RTA Accepted | 14-12-2017 20:04:47 | MFU MF Utilities India Pvt. Ltd. / MF Utilities India Pvt. Ltd. | SYSTEM / SYSTEM |
| Remarks To RTA : Pending for processing | | | | | |
| 15290QZA10000192 | 01 | RTA Processed | 15-12-2017 09:35:32 | MFU MF Utilities India Pvt. Ltd. / MF Utilities India Pvt. Ltd. | SYSTEM / SYSTEM |
| Remarks To RTA : Success | | | | | |
| 15290QZA10000192 | 01 | Credit Received | 16-12-2017 11:20:47 | MFU MF Utilities India Pvt. Ltd. / MF Utilities India Pvt. Ltd. | SYSTEM / SYSTEM |
| 15290QZA10000192 | 01 | Fund Transfer Instruction to Bank | 16-12-2017 12:30:10 | MFU MF Utilities India Pvt. Ltd. / MF Utilities India Pvt. Ltd. | SYSTEM / SYSTEM |
| Remarks To RTA : | | | | | |
| Internal Remarks : FTRN : 1712168001 | | | | | |

- Distributor initiated transactions are approved by investors
- Update is available immediately when customer approves the transaction

Distributor Initiated – Transactions – Real Time Tracking

| Order History | | | | | |
|------------------|------|--------------|-----------------|---|------------------------|
| Group Order No | ITRN | Event | Event Date Time | Entity ID / Name | Event User Code / Name |
| 15155RBA07000022 | | Order | 24-04-2019 | MFU MF Utilities India Pvt. Ltd. / MF Utilities India | 1608910000D / ARCHANA |
| | | Requested | 11:16:23 | Pvt. Ltd. | GARG |
| 15155RBA07000022 | | Order | 24-04-2019 | MFU MF Utilities India Pvt. Ltd. / MF Utilities India | 1608910000D / ARCHANA |
| | | Approved | 11:16:23 | Pvt. Ltd. | GARG |
| 15155RBA07000022 | 01 | Sent to RTA | 24-04-2019 | MFU MF Utilities India Pvt. Ltd. / MF Utilities India | SYSTEM / SYSTEM |
| | | | 11:31:04 | Pvt. Ltd. | |
| 15155RBA07000022 | 01 | RTA Rejected | 24-04-2019 | MFU MF Utilities India Pvt. Ltd. / MF Utilities India | SYSTEM / SYSTEM |
| | | | 11:42:36 | Pvt. Ltd. | |

Remarks To RTA : DMAT folios should be routed through exchange or DP for this USER_TXRN_NO : 325191140000080

[Refresh](#)

- And when transactions are Rejected
- Update is available immediately
- Alongwith the reason

Enabling Responsive Customer Service

Distributor Initiated – Transactions – Real Time Tracking

Stage by Stage Tracking even for physical transactions

- Order Requested – Event Date & Time Stamp (27-12-2018 13:35:46)
- Order Approved (by customer) – Event Date & Time Stamp
- Deposit slip added
- Sent to RTA
- RTA Accepted
- RTA Processed / Rejected

Removes All uncertainty for Better Customer Servicing



Distributor Initiated – Transactions – Real Time Tracking

| Order History | | | | | |
|--------------------------------------|------------------------|--------------------------------------|---------------------|---|----------------------------|
| Group Order No | ITRN | Event | Event Date Time | Entity ID / Name | Event User Code / Name |
| 1820 | 03 | Order Requested | 27-12-2018 15:35:46 | 500003 CAMS - POS / CAMS - POS | 18324500004 / Imran Khan |
| 1820 | 03 | Order Approved | 27-12-2018 19:03:41 | 500003 CAMS - POS / CAMS - POS | 18324500001 / Ajay Utekar |
| 1820 | 03 | Deposit Slip Added | 27-12-2018 19:09:59 | 500003 CAMS - POS / CAMS - POS | 18324500001 / Ajay Utekar |
| 1820 | 03 | 01 Sent to RTA | 27-12-2018 20:00:26 | MFU MF Utilities India Pvt. Ltd. / MF Utilities India Pvt. Ltd. | SYSTEM / SYSTEM |
| 1820 | 03 | 01 RTA Accepted | 28-12-2018 00:54:28 | MFU MF Utilities India Pvt. Ltd. / MF Utilities India Pvt. Ltd. | SYSTEM / SYSTEM |
| Remarks | Pending for processing | | | | |
| 1820 | 03 | 01 RTA Processed | 28-12-2018 09:43:28 | MFU MF Utilities India Pvt. Ltd. / MF Utilities India Pvt. Ltd. | SYSTEM / SYSTEM |
| Remarks | Success | | | | |
| 1820 | 03 | Order Audited | 28-12-2018 11:57:45 | MFU MF Utilities India Pvt. Ltd. / MF Utilities India Pvt. Ltd. | 1736310002F / Ritesh |
| 1820 | 03 | Deposit Slip Accepted | 29-12-2018 13:23:54 | 600003 ICICI Bank / ICICI Bank | 14344600005 / Bankuser : 1 |
| Inter | Accepted By Bank | | | | |
| 1820 | 03 | 01 Credit Received | 31-12-2018 21:43:23 | MFU MF Utilities India Pvt. Ltd. / MF Utilities India Pvt. Ltd. | SYSTEM / SYSTEM |
| 1820 | 03 | 01 Fund Transfer Instruction to Bank | 01-01-2019 13:17:07 | MFU MF Utilities India Pvt. Ltd. / MF Utilities India Pvt. Ltd. | SYSTEM / SYSTEM |
| Internal Remarks : FTRN : 190101H009 | | | | | |



Distributor Initiated Login



Welcome - **Name of investor**

(through LALIT S **Name of IFA**)

Last Login - 08-01-2019 18:32:29 Password Expires on - 39 days



Account CAN Transaction Status Special Products Connect

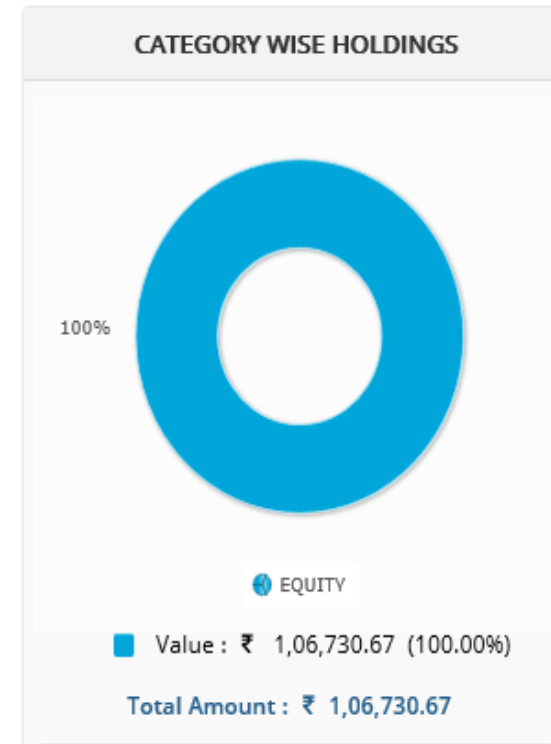
Time : 23:53:02

DASHBOARD

Holdings **CAN NO** Include ZERO Holdings

CAN Name : **INVESTOR NAME**

| Scheme Details | Folio # | Units | Current Value (₹) | Options |
|--|---------|-------|--------------------------|---------|
| EQUITY Value : ₹ 1,06,730.67 (100.00%) | | | | |
| Aditya Birla Sun Life Frontline Equity Fund -Growth-Regular Plan Current Value is based on NAV : ₹ 215.5400 as on NAV Date: 09-01-2019 | 10182 | 85 | 55.384 (U) 11,937.47 | |
| IDFC Focussed Equity Fund-Regular-Growth Current Value is based on NAV : ₹ 35.5800 as on NAV Date: 09-01-2019 | 18733 | 09 | 336.219 (U) 11,962.67 | |
| Invesco India Contra Fund - Growth Current Value is based on NAV : ₹ 46.0900 as on NAV Date: 09-01-2019 | 21059 | 64 | 300.115 (U) 13,832.30 | |
| L&T Emerging Businesses Fund Growth Current Value is based on NAV : ₹ 24.4650 | 35883 | 64 | 524.886 (U) 12,841.34 | |



Distributors can provide login access to their customers, **if they want to**

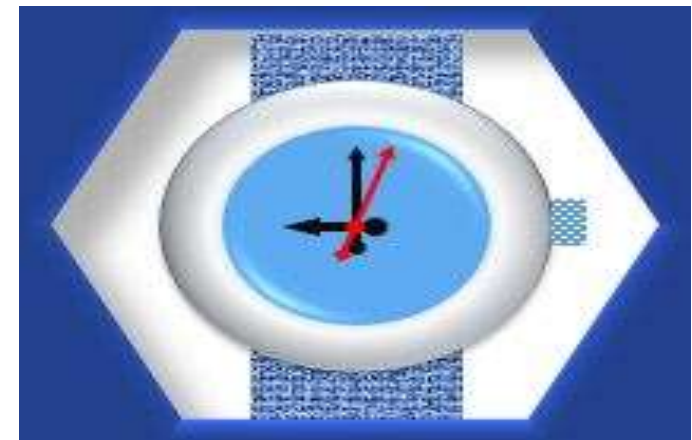
The CaST Advantage

Planning Systematic Investments

- With the flexibility of skipping an instalment owing to either cash flow constraints or adverse market conditions
- With the flexibility of stopping and starting transaction anytime
- With the flexibility of making payment from any bank account
- With flexibility for one time or repeat transaction

With CaST (Create and Schedule Transaction)

- One time setup
- Repeated Execution for up to Five years
- Up to 20 CaST setups for each CAN
- Customer Approval through Email/SMS



The CaRT Advantage

Planning Systematic Investments

- With the flexibility of skipping an instalment owing to either cash flow constraints or adverse market conditions
- With the flexibility of controlling the debit happening to bank account
- With the flexibility of making payment from any bank account

With CaRT (Create and Retain Transaction)

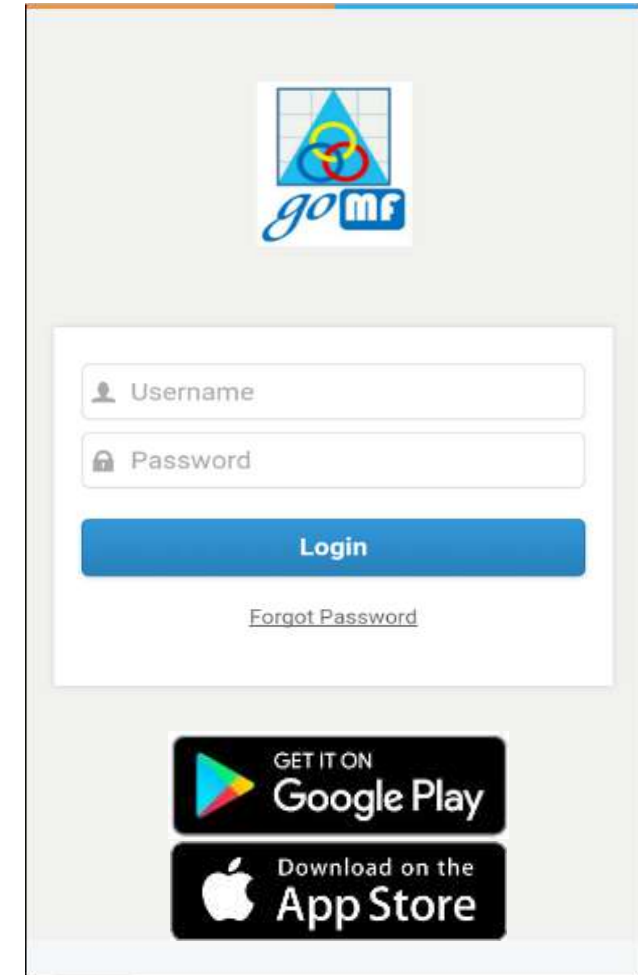
- Create your own Transaction Template
- Place Orders with couple of clicks
- Modify the CaRT anytime
- Up to 20 CaRT options for each CAN




The MFU Mobile APP



- Convenience on the GO
- Thin Client App for maximum performance
- All the features of the portal available on the *go mf* app.
- Initiate and track transaction on GO
- Paperless record keeping
- Submit Transaction on the spot with customer once decided



MFU – to SUM up

- Electronic client onboarding online without physical documents
- Onboard fresh investor along with CAN, KYC & Transaction
- Both offline and online transaction (TransactEezz)
- ARN Swipe (Create transaction through other ARN)
- TransactEezz with physical cheque
- Convenience of One Time One Place Payment Mandate (PayEezz)
- Systematic Planning through CaST and CaRT
- App for mutual fund industry - 



Welcome to MFU

Relationship Team

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CenCoM

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