

How To open New Demat & Trading Account Online with BOBCAPS

You will need to follow few simple steps to open your new Demat & Trading Account Online with BOB Capital Markets Ltd.

Please Note

Demat & Trading account is opened with BOB Capital Markets Ltd “BOBCAPS”

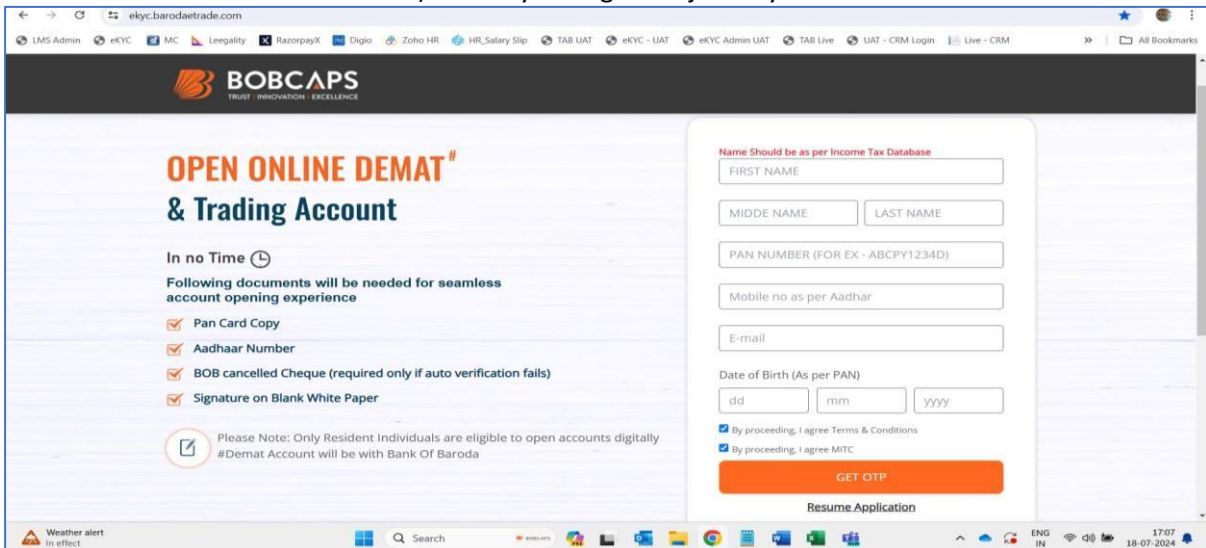
Requirement and other information

- PAN Number, Aadhaar Number, Valid Email ID, Valid Mobile Number, Active & Individual savings account with any bank
- All the above details are required to be unique in nature and should not match with any of our existing customer
- This online process of new Demat & Trading account opening is applicable for Resident Individual clients only. Non-individual & NRI category clients to process the request via Off-line medium (Physical form).

Follow below mentioned steps by going to our website www.ekyc.barodetrade.com to open the account.

STAGE 1 – Basic Detail

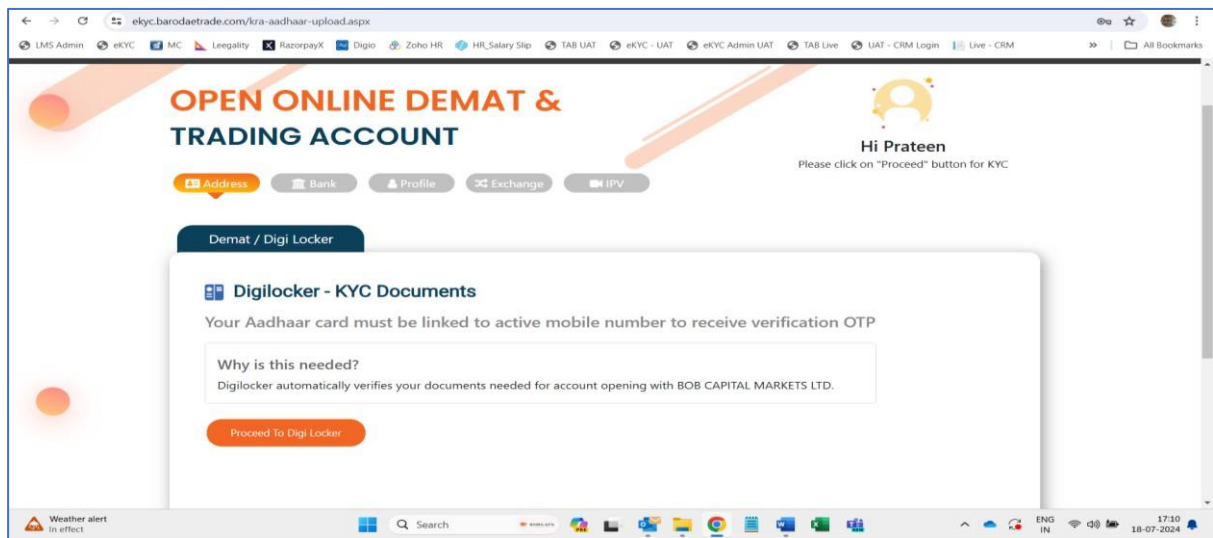
- Online you reach on the above-mentioned website, you will need to enter Your Name as per IT Records, PAN Number, Mobile Number & Email ID along with your DOB
- PAN is validated using ITD Records and Mobile & Email are validated using OTP
- Once OTP is successfully validated and you confirm the Name fetch from IT Records, you will move to next stage, to capture your address.
- You are requested to read and accept terms & condition and MITC (Most Important Terms & Condition) before you begin the journey.



The screenshot displays the BOBCAPS website interface for opening a new Demat & Trading Account. The page title is "OPEN ONLINE DEMAT & Trading Account". Below the title, it states "In no Time" and lists the documents needed for seamless account opening: Pan Card Copy, Aadhaar Number, BOB cancelled Cheque (required only if auto verification fails), and Signature on Blank White Paper. A note specifies that only Resident Individuals are eligible for digital opening, and the account will be with Bank Of Baroda. The registration form on the right includes fields for: FIRST NAME, MIDDE NAME, LAST NAME, PAN NUMBER (FOR EX - ABCPY1234D), Mobile no as per Aadhar, E-mail, and Date of Birth (As per PAN) with dd, mm, and yyyy sub-fields. There are two checkboxes: "By proceeding, I agree Terms & Conditions" and "By proceeding, I agree MITC". A prominent orange "GET OTP" button is at the bottom of the form, with a "Resume Application" link below it. The browser's address bar shows "ekyc.barodetrade.com".

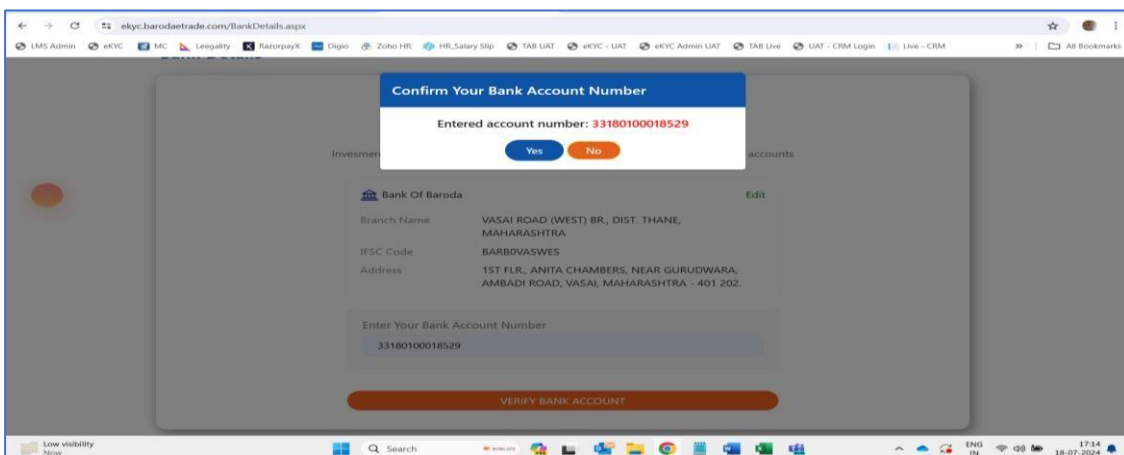
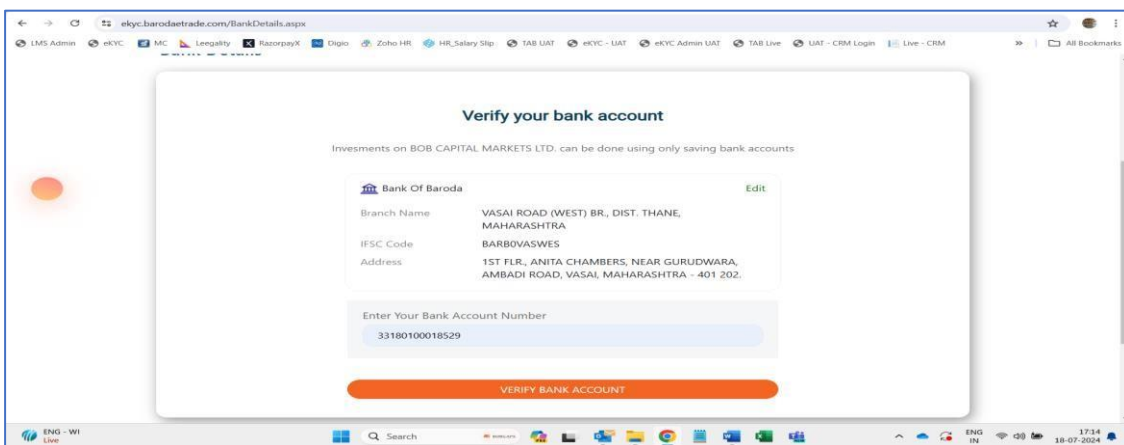
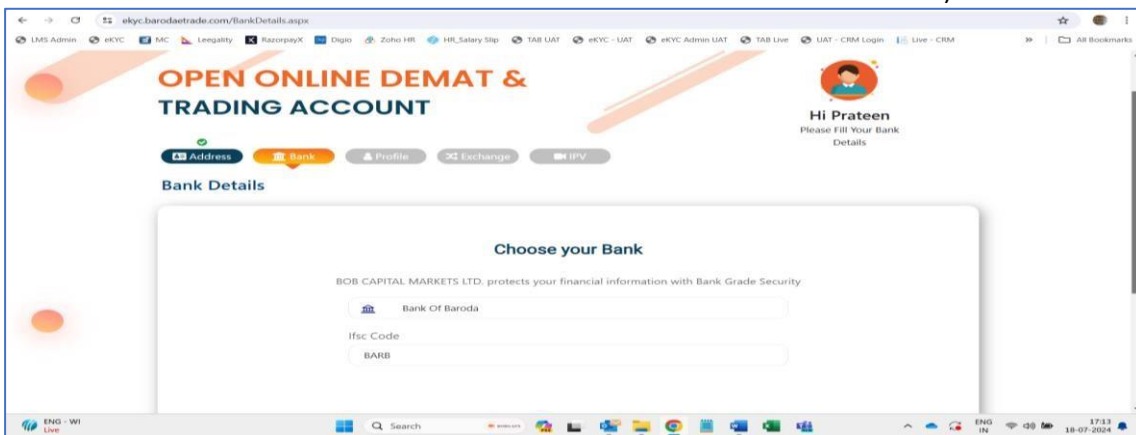
STAGE 2 – Digi Locker – To capture your ePAN and eAadhaar

- Digi Locker will be validated by the client using Aadhaar Number & OTP and Digi Locker PIN. Once successfully verified, we'll capture the required KYC information from Digilocker (Address, eAadhaar & ePAN)
- In case digi locker is not activated/created by the customer, Digi Locker will allow the user to create/enable new digi locker during the process
- Using Digi Locker: We capture ePAN & eAadhaar.



STAGE 3 – Bank Detail

- Bank Name & IFSC is to be entered here by you.
- Using your IFSC Code, we will fetch your Bank Branch details for your confirmation.
- Your Name as per Bank is auto captured using Penny Drop Method
- In case where Penny Drop is not successful, our system prompts you to upload applicable bank proof such as Bank Statement/passbook or cancel cheque (Your name & bank account number should be visible for verification)



STAGE 4 – Profile Detail (Additional Personal Information)

- On this stage, you are requested to provide some basic but mandatory information such as, Marital Status, Trading Experience, Occupation Type, Annual Income, Qualification, Mother Name, Father or spouse Name, Nomination, PEP Declaration and Running Account Settlement
- You are requested to upload photo of your signature

OPEN ONLINE DEMAT & TRADING ACCOUNT

Hi Prateen
Please Fill Your Profile Details

Address Bank Profile Exchange ePV

Personal Details

Marital Status: Select Marital status
Trading experience: Select Years of Experience
Occupation Type: Select Occupation
Your Annual income: Select Annual income

Qualification: Please Select

Mother's name: Mrs. FIRST NAME MIDDLE NAME LAST NAME

Father/Spouse name

Father/Spouse name: Father Spouse
Mr. FIRST NAME MIDDLE NAME LAST NAME

Additional Information

Are you a politically exposed person? No
Running Account Settlement: Once in a Quarter

Do you wish to nominate? Yes NO

Upload Applicant Signature

For Official Use Only (Not to be filled by client)

Are you a politically exposed person? No
Running Account Settlement: Once in a Quarter

Do you wish to nominate? Yes NO

Upload Applicant Signature

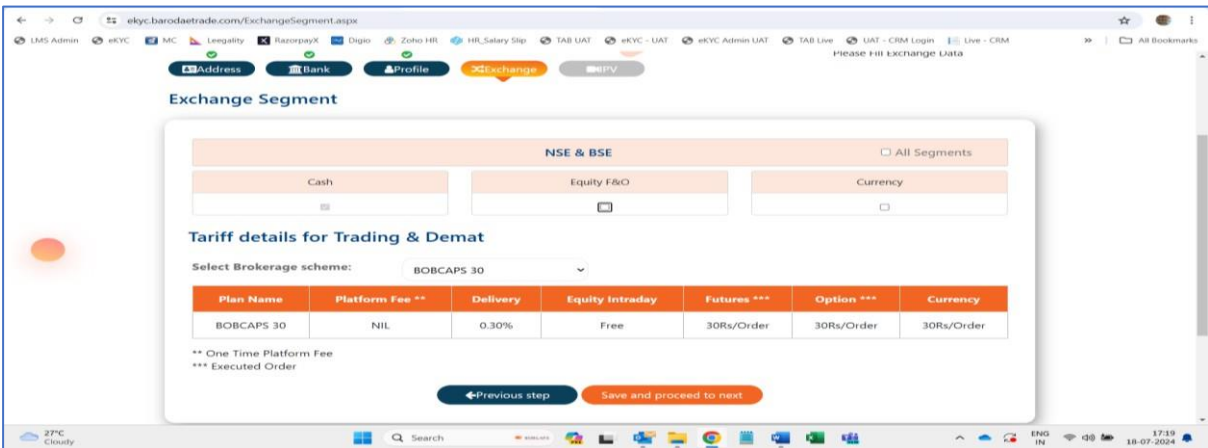
For Official Use Only (Not to be filled by client)

Previous step Save and proceed to next

www.barodaetrad.com | 8652 270270/ 022-6138 9300 | customercare@bobcaps.in

STAGE 5 - Exchange with Segment Selection and choose Brokerage Plan

- You are requested to select F&O Segment on this stage if you wish to enable it with your new account
- Cash segment across exchange is already selected for your ease
- Choose the best suitable brokerage plan from the 5 different plans we offer (plan detail are shown along with DP charges)
- In case you opt for F&O during segment selection, you are requested to upload the relevant financial proof such as Bank Statement, Salary Slip, ITR Copy, Net-worth certificate and Demat Holding Statement
- In case of Staff plan selection, you will have to provide your ID proof to confirm that you're a Staff of BOB.
- Staff account option is valid for active BOB staff, BOB alumni or blood relative of a BOB Staff.



Exchange Segment

NSE & BSE All Segments

Cash Equity F&O Currency

Tariff details for Trading & Demat

Select Brokerage scheme: BOBCAPS 30

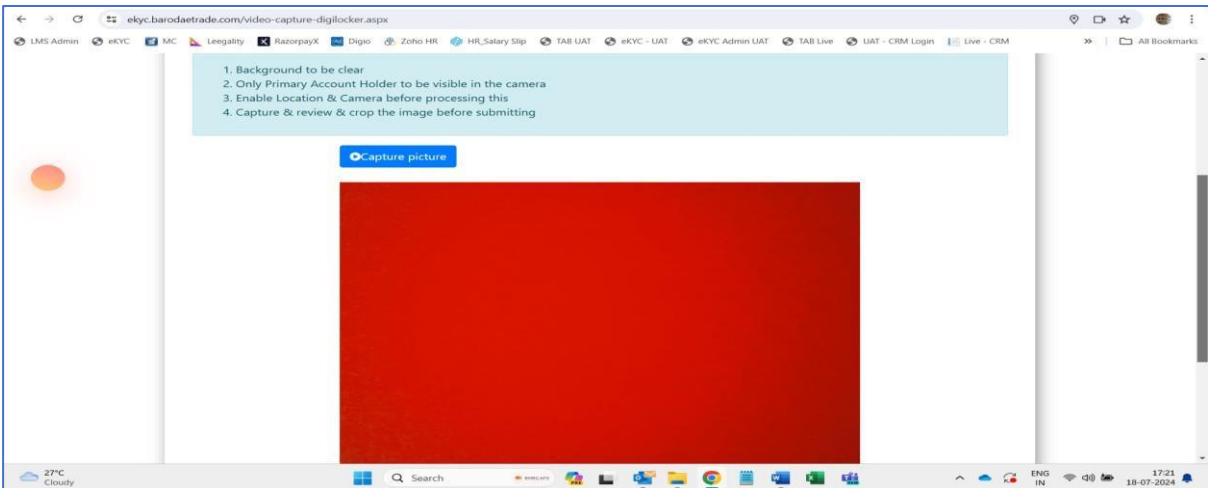
Plan Name	Platform Fee **	Delivery	Equity Intraday	Futures ***	Option ***	Currency
BOBCAPS 30	NIL	0.30%	Free	30Rs/Order	30Rs/Order	30Rs/Order

** One Time Platform Fee
*** Executed Order

[← Previous step](#) [Save and proceed to next](#)

STAGE 6 - Live Photo Capture

- Moving on to the next stage, you are requested to capture your live photo along with your location
- Once the Photo and location is captured, you move on to the last & final stage of the journey – eSign of your application

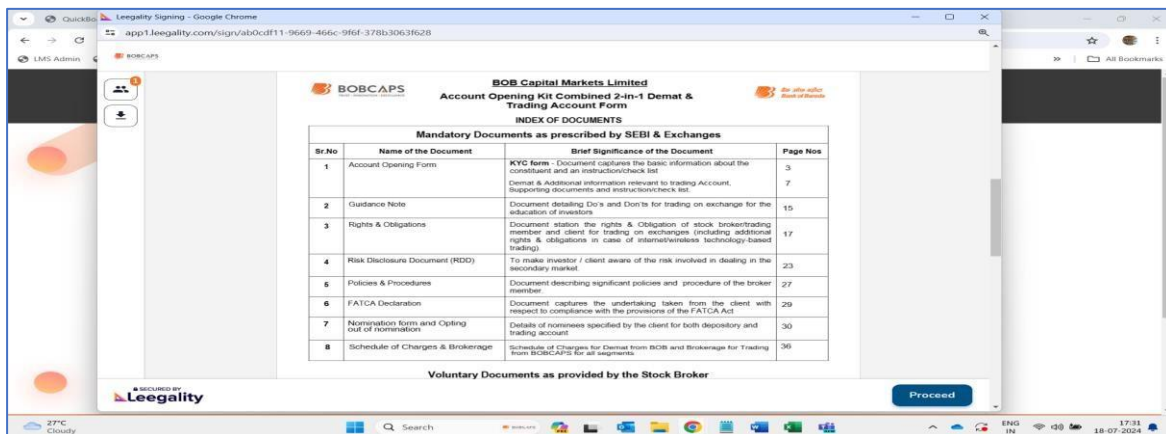
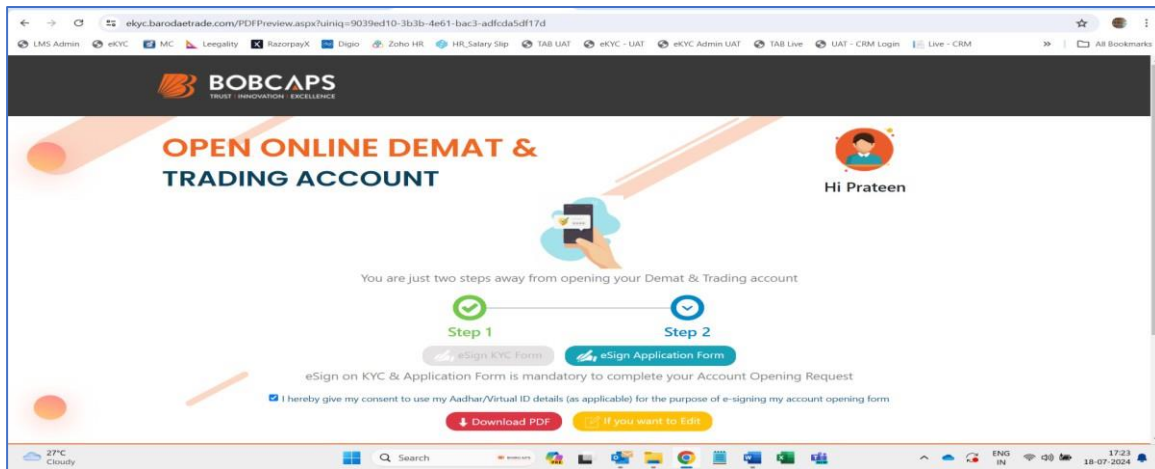
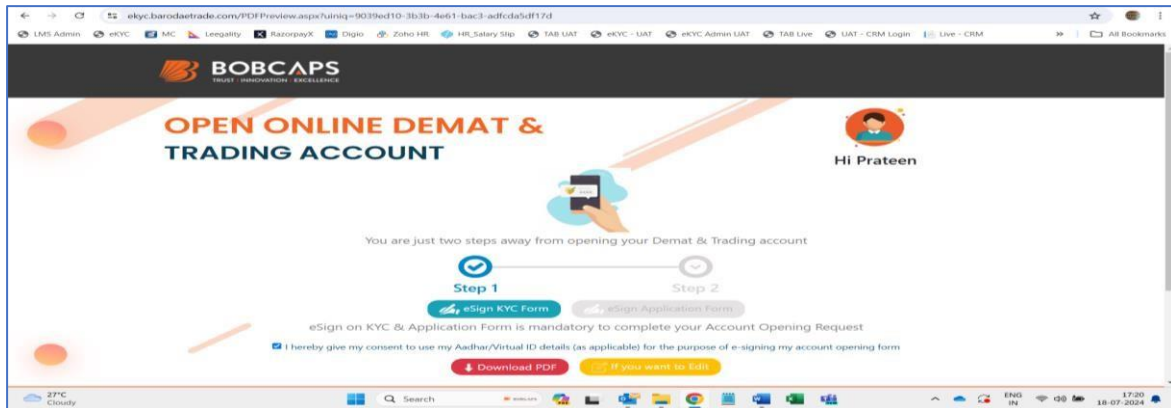


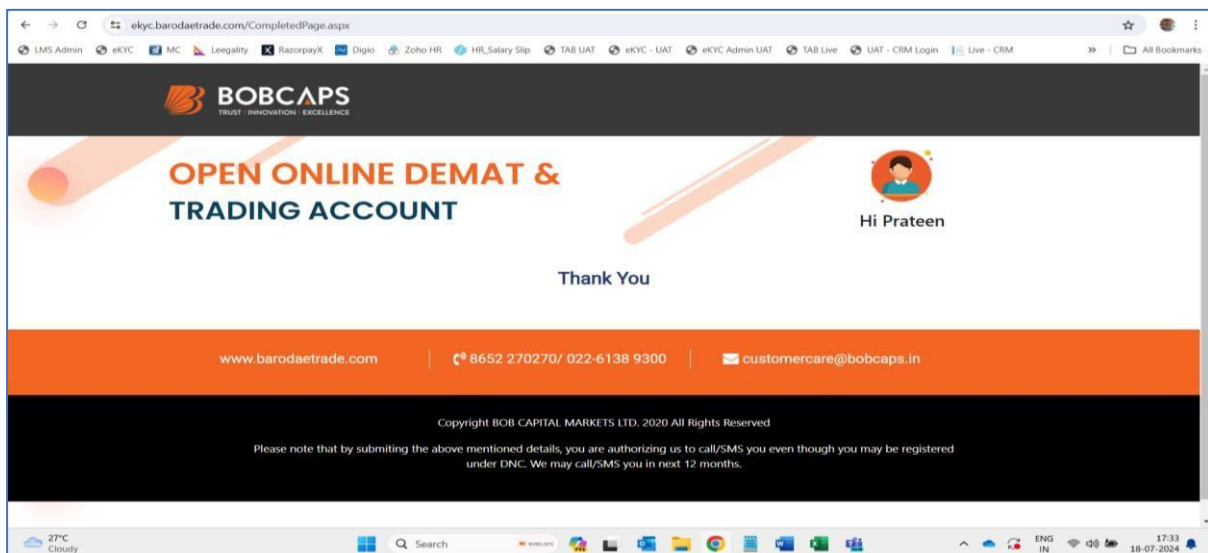
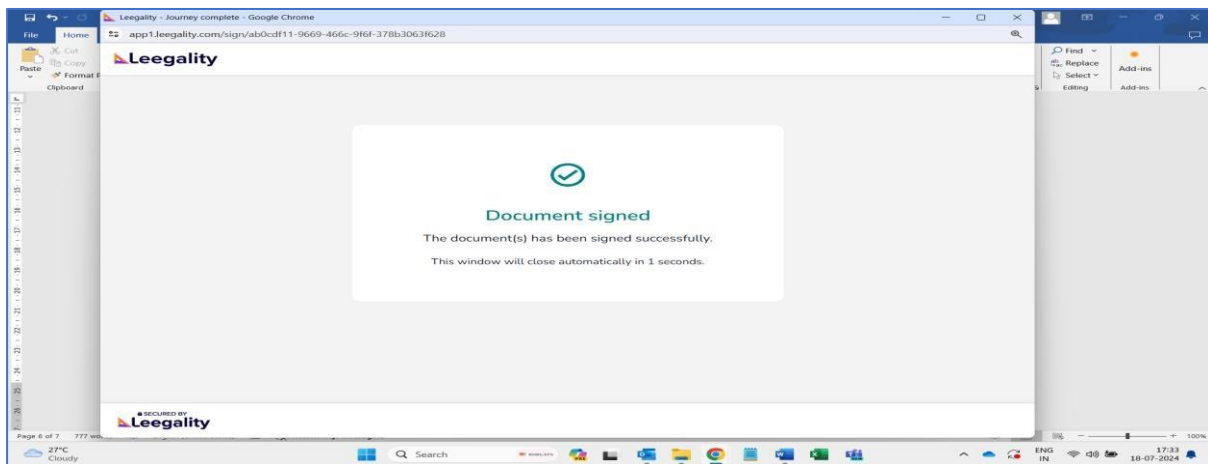
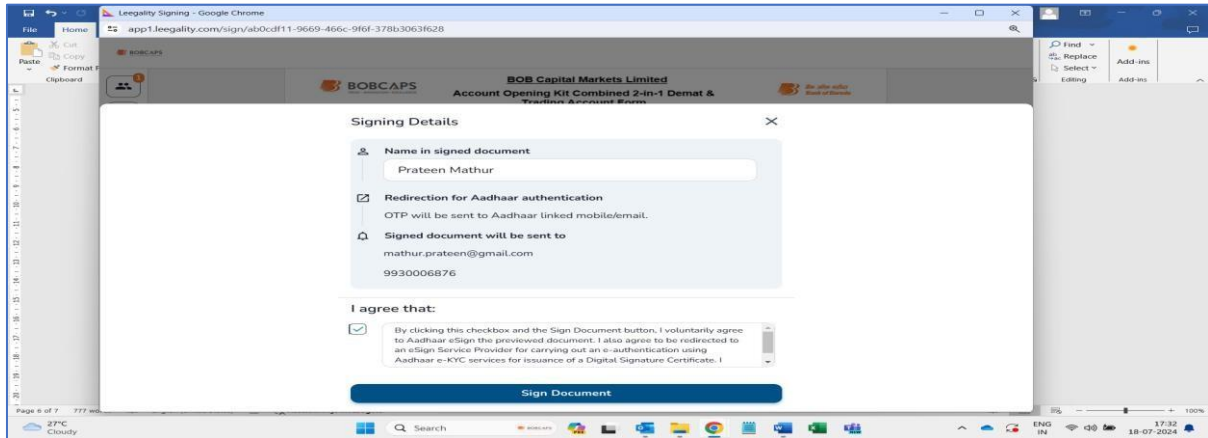
1. Background to be clear
2. Only Primary Account Holder to be visible in the camera
3. Enable Location & Camera before processing this
4. Capture & review & crop the image before submitting

[Capture picture](#)

STAGE 7 – Review Form and complete eSign

- You are required to process 2 separate eSign
- 1st eSign is for KYC form, and PDF with data is displayed and should be verified before processing for eSign
- 2nd eSign is for Application form, wherein PDF with all the data is displayed and this should be verified by you before processing for eSign
- Once both the eSign are successfully completed, your e-signed application form will be sent to your registered email id and an SMS will be sent with a link to download the PDF.





Important Note

- Once eSign is done, we share your detail along with application form with our verification desk and post approval and successful verification of the Account Opening Form, your account opening and activation process will begin.
- You will be notified once the account is opened and activated (ready to use) via an Email (sent on your registered email id)

eKYC Workflow including back-end process

