StAR MF Corp Direct

Portal Readiness Status

Portal Live for

Public Corporates Investors	Private Corporate Investors

Portal Under Development for

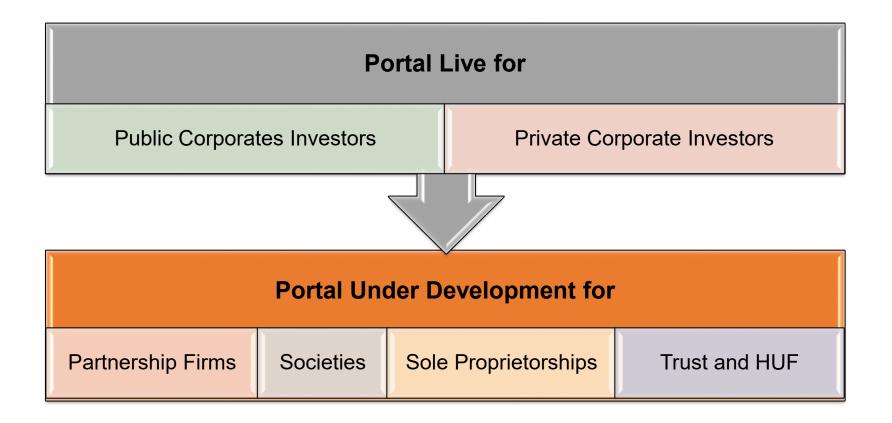| Partnership Firms	Societies	Sole Proprietorships	Trust and HUF

Key Information & Features

❖ Complete web based Online Portal with Self-Service options

❖ **Key Features:**

  ➢ Completely Paperless And Digital

  ➢ Secured & Simple Workflow With Initiator & Approver Model

  ➢ User Defined Checker Levels

  ➢ Corporate Parent-Child Concept

  ➢ Multi Transactions At Single Click

  ➢ Multi Payments Option

  ➢ Single Login for Multiple Folios

  ➢ SMS/Email Approval And Notifications

  ➢ Web & Customized Connectivity (based on Corporate requirements)

  ➢ Portfolio And Transaction History Tab

  ➢ Transactions Basket

  ➢ 24*7 Access to Portfolio

  ➢ Quick On-boarding For Corporates Who Has PAN Complaint & Already Transacting *

*If the corporate has transacted in any of the AMC/RTA Platform

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Module Details

Convenience

- Paperless transactions

- Single login for multiple Folios

- SMS/Email Approval

Product

- 24/7 Access to the Portfolio

- New Features Updates

- Single view for all the transaction

Key Features

- Access to Portfolio view *

- Transactions Details / Reports / Basket

- Corporate Parent – Child concept

- Web and API connectivity

Pricing

- NO Administrative Cost

- Nil Set-up Cost

Upcoming Feature

Corporate Registration Process

One Time Online Registration

- Registration with registered Email ID and PAN number

- Mapping of Existing Funds with Folios*

- Authenticated by Authorized / Approved Signatory

Supporting Documents

- Authorized Signatory List

- Board Resolution

Role Mapping: User Type

- **Role 1:** Viewer/Initiator

- **Scope**:
- a. View Transactions
- b. Manage Transaction Process and Follow-up

- **Number Of Users:**
- Single or Multiple (Max 5)

- **Role 2:** Approver

- **Scope**: Authorized signatory of corporate

- **Number Of Users:** Single or Multiple (Max 5)

*Upcoming feature

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Transaction Process

Initiating Transaction

- Initiator logs on to website.

- Selects Folio to initiate transaction.

- Transaction type & details is initiated

- Prefilled form is auto generated

- Initiator submits the transaction.

Approval Process

- Authorizers receive instant alerts via Email & SMS

- Authorizer approves/ reject transaction.

- Alerts are triggered for other Approvers

- Upon required approvals transaction is reported

Settlement

- For Purchases: Credit And Transaction Reporting decide the Applicable Cut-off Date

- Other Than Purchases: Transactions are Settled as per Transaction Reported Time

- Dual Options (Clearing Corporation & AMC Account) are Available - For Fund Movement

Client Services

- Transaction Live Status Available.

- * Retriggers approval of Email & SMS Alert.

- Download transaction report(pdf & xml.)

*Upcoming feature

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