

Do's of Demat

- Scrutinize thoroughly both the transaction and holding statement that you receive.
- Accept the DIS book from your Depository Participant (DP) only if each DIS slip has been pre-printed with a serial number & client id is pre stamped.
- Keep the DIS book in a safe custody just as you keep your cheque book in your locker.
- In case of a Joint account, ensure that all demat account holder(s) sign on the DIS.
- Please strike out any empty spaces on the DIS slip while making use of it.
- Cancellations or corrections on the DIS should be initialed or signed by all the account holder(s).
- Submit the DIS ahead of the delivery date for all type of market transactions. DIS can be issued with a future execution date.
- Always mention the details like International Securities Identification Number (ISIN), number of securities accurately. (ISIN details can be checked through https://nsdl.co.in/master_search.php or <https://nsdl.co.in/list-codes.php> on NSDL website).
- Intimate any change of address or change in bank account details to your DP immediately.
- Register for NSDL's internet based facilities viz., 'SPEED-e' & 'IDeAS' to transact & monitor your demat account yourself. You can contact your DP for getting it registered.
- Check the demat performance of the Issuer company with your DP before dematerializing your share certificates. The list of companies whose request are pending for demat is published on NSDL website www.nsdl.co.in.
- Before sending securities for demat, record the distinctive numbers of the securities sent.
- Register for NSDL's SMS Alert facility to receive alerts for debit transfers, credits for IPO, bonus & sub-division, failed instructions, Overdue instructions, change of mobile number, change of address, debit of Mutual Fund units, alerts upon invocation of pledged securities to Pledgor Clients, registration and de-registration of Power of Attorney & modification / cancellation of Nominee name in your demat account.
- Before giving Power of Attorney to anyone to operate your demat account, carefully examine the scope & implications of powers being granted.
- The demat account has a nomination facility and it is advisable to appoint a nominee, in case of sole account holders.
- Ensure that, both, your holding and transaction statements are received periodically as instructed to your DP. You are entitled to receive a transaction statement every month if you have any transactions and once in two quarters if there has been no transactions in your demat account.

Don'ts of Demat

- Do not leave your Delivery Instruction Slip (DIS) book with anyone else.
- Do not sign blank DIS as it is equivalent to a bearer cheque.
- Do not issue demat Delivery Instruction Slip from any other family members, friend's accounts. Issue the DIS only from your own demat account.
- Avoid over-writing, cancellations, misspellings, changing of the name and quantity of securities.
- Do not give general Power of Attorney (POA). Be specific while giving your POA.
- Do not share your password with anyone. We urge you not to part with your password and other sensitive account information to anyone. This will preserve the security of your account and of your transactions.