Investor Do’s and Dont's

DO's

MF & SIF

- Read SID/SAI/KIM before investing.
- Complete KYC and risk profiling.
- Invest based on your financial goals, risk appetite, and investment horizon.
- Review your portfolio annually.
- Check your Consolidated Account Statement (CAS) regularly.
- Understand SIF derivatives and leverage-related risks.

General

- Report any suspicious communication immediately.
- Ask questions if you have any doubt regarding product risks or fees.

Dont's

- Do NOT invest without understanding your risk profile.
- Do NOT share your OTP, password, or login credentials with anyone.
- Do NOT expect guaranteed returns from any investment.
- Do NOT invest beyond your approved risk profile or risk ceiling.
- Do NOT ignore any unsuitability communication received.
- Do NOT make investment decisions solely based on past performance.
- Do NOT fall for schemes promising unrealistic or guaranteed returns.

Investor Charter — Our Commitment

- Act in your best interest in accordance with the AMFI Code of Conduct.
- Conduct proper risk profiling before making any recommendation.
- Disclose all commissions and distribution-related compensation transparently.
- Do not guarantee or promise any specific returns.
- Resolve investor grievances within 15 working days.