SBI MUTUAL FUND
A PARTNER FOR LIFE
Sponsor : State Bank of India
Investment Manager : SBI Funds Management Pvt. Ltd.
(A Joint Venture between SBI & AMUNDI)
191, Maker Towers 'E', Cuffe Parade, Mumbai - 400 005. Tel.: 022-22180221-27, www.sbimf.com

APPLICATION NO.

TRIGGER APPLICATION FORM (Please fill in BLOCK Letters)

ARN & Name of Distributor	Branch Code (only for SBI and Associate Banks)	Sub-Broker Code	Reference No. (To be filled by Registrar)

Upfront commission shall be paid directly by the investor to the AMFI registered Distributors based on the investors' assessment of various factors including the service rendered by the distributor

1. PARTICULARS OF FIRST APPLICANT

EXISTING FOLIO NO.

Name (Mr./Ms./M/s.)

Mobile No. **E-mail ID**

Scheme / Plan

PAN **Mandatory Enclosures** ☐ PAN Proof ☐ KYC Acknowledgement

2. PARTICULARS OF SECOND APPLICANT

Name Mr./Ms./M/s.

PAN **Mandatory Enclosures** ☐ PAN Proof ☐ KYC Acknowledgement

3. PARTICULARS OF THIRD APPLICANT

Name Mr./Ms./M/s.

PAN **Mandatory Enclosures** ☐ PAN Proof ☐ KYC Acknowledgement

4. TRIGGER OPTION (PLEASE SELECT ANY ONE)

☐ NAV Appreciates by _____%

☐ NAV Depreciates by _____%

☐ Value Appreciates by Rs. _____

☐ Value Depreciates by Rs. _____

☐ Sensex Level _____points

Please tick any one of the following actions to be initiated on encountering the situation as mentioned above

Redemption ☐ Full amount ☐ Appreciation amount

Switch-out ☐ Full amount ☐ Appreciation amount to Scheme/ Plan _____

SIGNATURE(S) Applicants must sign as per mode of holding	⊗	⊗	⊗
	1st Applicant / Guardian / Authorised Signatory	**2nd Applicant / Authorised Signatory**	**3rd Applicant / Authorised Signatory**

Date | **Place**

INSTRUCTIONS FOR TRIGGER

Trigger is an event on happening of which the funds from one scheme will be automatically redeemed and/or switched to another scheme as specified by the investor. A trigger will activate a transaction/alert when the event selected for, has reached a value equal to or greater than (as the exact trigger value may or may not be achieved) the specified particular value (trigger point).

Types of Triggers:

1. **NAV Appreciation / Depreciation Trigger:** Under this facility, Investor can indicate NAV appreciation or depreciation in percentage terms for exit trigger. The minimum % NAV appreciation or depreciation is 5% and in multiples of 1% thereafter. On activation of the trigger the applicable NAV for the transaction will be of the day on which the trigger has been activated.
2. **Index Level Appreciation / Depreciation Trigger:** Under this facility, investor would indicate the Sensex level as the trigger to redeem/ switch from one scheme to another. The Sensex level to be indicated in multiples of 100 only. In case indicated otherwise, it will be rounded off to nearest 100 points. The investor may choose the Sensex level above or below the current level.
3. **Capital Appreciation / Depreciation:** Under this facility, investors will be given the option to indicate the capital appreciation / depreciation in monetary terms to activate the trigger. Minimum Capital Appreciation / Depreciation should be Rs. 10,000 & in multiples of Rs. 1000 thereafter.

Other terms and conditions of Trigger facility are as follows:

1. Trigger facility is available only in "Growth" option of the source scheme.
2. Trigger facility is not available in "Daily / Weekly" options of the target scheme.
3. Investor have the option to select the entire amount / appreciation to be processed on the activation of trigger.
4. The Trigger option mandate will be registered on T+10 basis.
5. Minimum investment amount under the "Trigger Facility" is Rs. 25,000/- and in multiples of Rs. 1 thereafter.
6. Combination of trigger facilities is not permitted. The investor may choose only one of the available triggers.
7. The specified trigger will fail, if the investor(s) do not maintain sufficient balance in source scheme(s) on the trigger date. Trigger will also not get executed in case units are under pledge / lien.
8. Trigger facility shall be applicable subject to exit load, if any, in the transferor schemes.
9. Investor cannot modify a Trigger registration once submitted. Investor must cancel the existing Trigger option and enroll for a fresh Trigger option.
10. In case Trigger is not activated within one year of application, the Trigger registration will cease to exist. In such cases, investor(s) would have to register fresh trigger mandates.
11. If any financial transaction (purchase, redemption or switch) processed in the source scheme, the trigger will be cancelled automatically.

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