

## Axis Direct Freedom Plan – For Priority Customers

	Card Rate	Plan Summary
Plan Code	Prosperity	Freedom
Account Opening Charges	Rs. 499/-	ZERO
Applicable Up to Delivery Turnover*	-	Based on Funds credit*
Applicable Up to Delivery Turnover Validity	-	T+3 Months
Brokerage Rates (Post utilization of CDT)		
Delivery (Each Leg)	0.50%	0.30%
Intraday (Each Leg)	0.05%	0.03%
Future (Each Leg)	0.05%	0.03%
Option (Digital) (per Order) [in Rs.]	10	20
Option (Offline) (per Lot) [in Rs.]	10	10
Value Added Services		
MTF Rate	18% p.a.	14.40% p.a.

\* Delivery Turnover = Buy + Sell transactions

Free Brokerage based on Fund Credit in linked Axis Bank Account	
Funds transfer value (to linked Axis Bank SB A/c)	Free brokerage (T+3 months)
>= 50000 & < 75000	1500
>= 75000 & < 100000	2250
>= 100000 & <200000	3000
>= 200000 & <300000	5000
>= 300000 & <400000	6000
>= 400000 & <500000	8000
>= 500000	10000

**Note:**

- Brokerage will be charged as per applicable rate subject to a minimum of Rs. 25/- (Except Equity SIP) per executed order and a maximum of 2.5%.
- In case the minimum brokerage calculated comes to more than 2.5% or Rs. 0.25 per share, the higher of the two will be considered.
- For HNI category clients, Priority & Burgundy clients of Axis Bank, the rates applicable under the Freedom Plan would be 0.30% for Delivery transactions and 0.03% for Intraday and Futures. No additional benefit in brokerage for transactions in Options or MTF Rates.

## Terms & Conditions

### 1. Activation of Plan:

- Funds deposited within T-15 Days to T+7 days of account opening (T is Account opening date) will be considered for activation of Freedom plan
- Example, if customer deposited Rs 50,000 in linked Axis Bank account by T+7 days of account opening than he will be mapped Freedom plan on T+12 day and will be eligible for brokerage reversal of Rs 1500.
- The following will not be considered in calculating the net funding amount: (i) Salary credit (ii) Loan credit (Home Loan, PL etc.) and (iii) Proceeds from sale of securities from linked Axis Direct account
- Funds transferred in multiple transactions will also be considered in calculating the net funding
- Up to T+12 day of account opening, standard brokerage rates will apply.
- In case, customer fails to transfer the funds he will remain mapped to standard brokerage plan.

### 2. Brokerage Reversal Process:

- Brokerage Credit will be given to the customer over a cumulative period of T+ 3 months or exhaustion of CDTL (whichever is earlier) from trading account opening date.
- For all trades brokerage within the month will be reversed by first 5 working days on next month.
- Brokerage Credit will be received only to the extent of lower of the brokerage value levied to the customer during this period or the amount mentioned in the table “Free Brokerage based on Fund Credit in linked Axis Bank Account” above.

### 3. General Terms and Conditions:

- This “Freedom Plan” is from Axis Securities Limited (ASL) and is applicable only to the new trading accounts opened with Axis Securities Account to which Axis Bank savings account is linked.
- The plan will only be applicable to customers who have chosen the Freedom Plan as a part of their account opening journey.
- Please note that all brokerage rates presented as a part of any journey/ collaterals are indicative of the amounts transferred to their linked Axis Bank account.
- Option Brokerage for all trades done through online mode will be Rs. 20/- per order and all trades made through offline mode will be Rs. 10/- per Lot.
- The validity of CTL offer will be T+3 months, whereas the discounted brokerage slab will have a validity of lifetime from the account opening date.
- Above offer is only available for Resident accounts.
- Once the Plan is opted then the plan cannot be modified/changed.
- Said plan cannot be clubbed with any other Brokerage Plan.
- Minimum brokerage of Rs. 25 per order will be applicable for equity segment i.e., both intraday and delivery (apart from complementary delivery turnover) based transaction.
- Standard brokerage rate will be applicable for all the other segment/products, which are not mentioned in the scheme or T&C.
- The Complimentary Turnover and other Free Value-added services will not be continued beyond the validity period unless otherwise specifically mentioned
- All statutory / regulatory levies and other charges including but not limited to Securities Transaction Tax, SEBI Turnover Fees, Exchange Transaction Charges, Stamp Duty and Service Tax shall be charged separately over and above the brokerage.
- In case of discontinuation of offers by ASL, for those customers who have reached the Complimentary Delivery Turnover limit, ASL reserves the right to discontinue the plan with 15 days’ notice period. In such casethe customer will be assigned the default brokerage plan, post serving the aforementioned notice period.
- The above benefits under the account are subject to regulatory norms in force from time to time and may be discontinued under any regulatory directions of for any reason, without giving prior intimation to the client
- Any dispute, with regard to the offer regarding brokerage, if not dealt through the Exchange Dispute resolution mechanism, shall be subject to Mumbai Jurisdiction.
- For any disputes pertaining to the Offer, the decision of ASL will be final and binding.
- In case of any queries/further clarifications, please contact on our customer support helpdesk at 022-40508080 or [helpdesk@axisdirect.in](mailto:helpdesk@axisdirect.in)

**Disclaimer:**

Investments in securities market are subject to market risks. Read all the related documents carefully before investing.

Axis Direct is a brand under which Axis Securities Limited offers its retail broking and investment services. Trading Member | Axis Securities Limited, CINNo.U74992MH2006PLC163204 | SEBI Single Reg. No.- NSE, BSE, MSEI, MCX & NCDEX – INZ000161633 | ARN- 64610 SEBI- Research Analyst Reg. No. INH 000000297

IRDA Corporate Agent (Composite) Reg. No. CA0073 | Portfolio Manager Reg. No.- INP000000654 | SEBI Depository Participant Reg. No. IN-DP-403-2019 | Investment Advisor Reg No. INA000000615

Compliance Officer – Mr. Jatin Sanghani, Email – [compliance.officer@axisdirect.in](mailto:compliance.officer@axisdirect.in) , Tel No. – 022-68555574, SEBI office addresses- <https://www.sebi.gov.in/contact-us.html>). In case of any grievances please write to: [helpdesk@axisdirect.in](mailto:helpdesk@axisdirect.in)

**Registered office address:** Axis House, 8th Floor, Wadia International Centre, Pandurang Budhkar Marg, Worli, Mumbai-400025.

**Administrative office address:** Aurum Q Parc, Q2 Building, Unit No. 1001, 10th Floor, Level – 6, Plot No. 4/1 TTC, Thane - Belapur Road, Ghansoli, Navi Mumbai, Pin Code – 400710.

# Special Offer on SmartEdge Plus Subscription

\*Terms & Conditions:

- The offer is applicable only for Priority Segment customers with Resident Indian status.
- You can get a 50% refund of charges for subscribing to SmartEdge Plus and product only for the first year, an investment offering with Research backed stock investment ideas. Please refer to the detailed Terms & Conditions of SmartEdge Plus before subscribing. To know more about SmartEdge Plus visit <https://simplehai.axisdirect.in/investing/smartedgeplus>
- The maximum refund is restricted to Rs 2,500 per customer
- The offer is applicable for SmartEdge Plus subscription received during the offer period of 1<sup>st</sup> Aug, 2024 to Mar 31, 2025
- The fee charged will be refunded upto the eligible amount by T+1 month (T being the month of SmartEdge Plus amount debit)
- The offer cannot be clubbed with any other offer and if you have received multiple offers from Axis Direct, the subscription fee reversal from all the offers will be limited to 50% of the actual fee received during this offer period
- The above offer is not applicable for NRIs
- The offer is non-transferable and is exclusively for whom it is intended

## Special Offer for Axis Intellect (AI) Subscription

\*Terms & Conditions:

- The offer is applicable for Priority Segment customers only with Resident Indian status.
- You can get a 50% refund of subscription charges for subscribing to Axis Intellect only for the first year; an investment offering with Research backed stock investment ideas. Please refer to the detailed Terms & Conditions of Axis Intellect before subscribing. To know more about Axis Intellect visit <https://simplehai.axisdirect.in/dynamicWeb/axisintellect/index.html>
- The maximum refund is restricted to Rs. 2500 per customer per case.
- The offer is applicable for Axis Intellect subscription received during the offer period of 1<sup>st</sup> Aug, 2024 to Mar 31, 2025.
- The fee charged will be refunded upto the eligible amount by T+1 month (T being the month of Axis Intellect subscription amount debit along with investment of min. 2 Lakhs).
- The offer cannot be clubbed with any other offer and if you have received multiple offers from Axis Direct, the subscription fee reversal from all the offers will be limited to 50% of the actual fee received during this offer period.
- The above offer is not applicable for NRIs.
- The offer is non-transferable and is exclusively for whom it is intended.
- Post taking 50% reversal of subscription amount of Axis Intellect, under no circumstances we shall refund the remaining subscription amount upon cancellation of the subscription.