

Contact Us

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Systematic Withdrawal Plan (SWP)

Systematic Withdrawal Plan (SWP) is a facility that enables Unitholders to withdraw specified amounts from the Scheme on a recurrent basis for a specified period at specified frequency by providing a single mandate/ standing instruction. The amount thus withdrawn by redemption will be converted into Units at Applicable NAV based prices and the number of Units so arrived at will be subtracted from the Units balance to the credit of that Unitholder.

Common Instructions

- 1. New Investors who wish to enroll for SWP should fill this enrollment form in addition to the application form.
- $2. \quad \text{Existing investors} \, \text{need to provide the Folio Number and SWP details only, duly signed by the Unitholder(s)} \, \text{as per the mode of holding in the portfolio.}$
- $3. \quad {\sf One\,SWP\,Enrolment\,Form\,can\,be\,filled\,for\,one\,Scheme/Plan/Option\,only}.$
- 4. Investors are advised to read the Key Information Memorandum (KIM) and Scheme Information Document (SID) of the Scheme and Statement of Additional Information (SAI) carefully before investing. The SID / KIM of the Scheme and SAI are available with the ISCs of Mahindra Mutual Fund, brokers/distributors and also displayed at the Mahindra Mutual Fund website i.e. www.mahindramutualfund.com
- $5. \quad Unit holders are advised to consult their tax consultant with regards to the treatment of the with drawal of units from the tax ation point of view.$

Features and Terms & Conditions of Systematic Withdrawal Plan (SWP)

Particulars	Available Frequency
	Monthly/Quarterly
SWP Dates Offered	Any date*
Minimum amount for SWP installment (subject to completion of Lock-in	Rs. 500/- & in multiples of
Period in Mahindra Mutual Fund Kar Bachat Yojana)	Re. 1/- thereafter
Minimum Number of Installments	2

$Default\,Frequency-Monthly\quad Default\,Date (for\,both\,monthly\,and\,quarterly\,frequency)-10th$

- * If any SWP installment due date falls on a non-Business day, then the respective transactions will be processed on the next Business day. However, in case the chosen date is not available in a particular month, the SWP will be processed on the last day of that month. E.g., if selected date is 31st, SWP installment for the month of September will be processed on 30th September. However, if 30th September happens to be a Non-Business Day, the SWP will be processed on the next Business Day. **Note:** Anyone or more SWP transaction dates can be selected by the Unit Holders under the Monthly and Quarterly frequencies.
- $1. \quad Please \, contact \, the \, nearest \, Investor \, Service \, Centre \, (ISC) \, of \, Mahindra \, Mutual \, Fund \, for \, complete \, list \, of \, eligible \, Schemes \, for \, SWP.$
- 2. The application for start of SWP should be submitted to Official Point(s) of Acceptance at least 7 working days before the date of commencement / start date of SWP. Unit holder may change the amount (but not below the minimum specified) / frequency by giving written notice to any of the Official Point(s) of Acceptance at least 7 working days prior to next SWP execution date.
- 3. The Unit holder can withdraw a fixed amount on monthly/quarterly basis by redemption of units in the Unit holders' account. The provision of Minimum Redemption Amount of the designated Scheme(s) shall not be applicable to SWP transactions.
- 4. The load structure applicable to the Scheme prevailing at the time of enrollment will be applicable for all SWP transactions under the mandate.
- 5. If the SWP period or no. of installments is not specified in the transaction form, the SWP transactions will be processed until the balance of units in the unit holder's folio in the
- 6. The SWP mandate may be discontinued by a Unit holder by giving a written notice of at least 7 working days prior to the next SWP transaction date. SWP mandate will terminate automatically if all Units held by the unitholder in the Scheme are redeemed or upon the Mutual Fund receiving a written intimation of death of the sole / 1st Unit holder.

 If investor has selected multiple dates for registration and thereafter wishes to cancel any specific date(s) against multiple dates, then Investor has to provide the cancellation request to cease the entire multiple dates registered and submit a fresh registration request with the preferred dates. Any cancellation requests to cease specific dates against
- 7. Units marked under lien or pledge in the Scheme will not be eligible for SWP.
- $8. \quad \mathsf{SWP} \, \mathsf{in} \, \mathsf{a} \, \mathsf{folio} \, \mathsf{ofminor} \, \mathsf{will} \, \mathsf{be} \, \mathsf{registered} \, \mathsf{only} \, \mathsf{upto} \, \mathsf{the} \, \mathsf{date} \, \mathsf{ofminor} \, \mathsf{attaining} \, \mathsf{majority} \, \mathsf{even} \, \mathsf{though} \, \mathsf{the} \, \mathsf{instruction} \, \mathsf{may} \, \mathsf{be} \, \mathsf{for} \, \mathsf{the} \, \mathsf{period} \, \mathsf{beyond} \, \mathsf{that} \, \mathsf{date}.$
- $9. \quad In case the investor purchases additional Units in the Scheme under the same folio, the SWP facility would be extended to such units also.\\$
- 10. The AMC reserves the right to introduce SWP facility at any other frequencies or on any other dates as the AMC may feel appropriate from time to time. The AMC / Trustee further reserves the right to change / modify the terms and conditions under the SWP prospectively at a future date.

11. Investments through distributors

multiple dates registered, will be rejected.

As per directions of Securities and Exchange Board of India (SEBI), Investors can route their Application Forms directly and /or through the distributors /employees of the distributor who hold a valid certification from the National Institute of Securities Markets (NISM) and ARN provided by AMFI. Further, no agents/ distributors are entitled to sell units of mutual funds unless the intermediary is registered with Association of Mutual Funds in India (AMFI).

Employee Unique Identification Number (EUIN)

Every employee/ relationship manager/ sales person of the distributor of mutual fund products is required to quote the EUIN obtained by him/her from AMFI in the Application Form. Investors are requested to verify the AMFI registration details from their Distributor. However, in exceptional cases, where there is no interaction by the employee/ sales person/relationship manager of the distributor/sub broker with respect to the transaction and EUIN box is left blank, you are required to provide the duly signed declaration to the effect as given in the form.

Overseas Distributors

For Overseas Distributors, the ARN Code provided by AMFI is required to be incorporated in the space provided. Overseas Distributors are required to comply with the laws, rules and regulations of jurisdictions where they carry out their operations in the capacity of distributors.

Direct Investment

Investors applying Directly must mention "Direct" in ARN column. In case Distributor code is mentioned in the Application Form, but "Direct Plan" is indicated against the Scheme name, the Distributor code will be ignored and the application will be processed under Direct Plan. In case of valid application received without indicating "Direct Plan" against the Scheme / Plan name and without any Distributor Code mentioned on the form, the application will be processed under "Direct Plan".