

# Trigger Application Form



Distributor / Broker ARN	Sub-Broker Code	Sub-Broker ARN	EUIN

## 1. EXISTING UNIT HOLDER INFORMATION

Existing Folio Number		Please read the instructions carefully, before filling up the application												
Name of Scheme														
Option														Plan
Purchase Date	D	D	M	M	Y	Y	Y	Y	Purchase Amount					

(Any Transaction date & its respective transaction amount as per the investor's choice)

## 2. APPLICANT INFORMATION

Name of First / Sole Applicant	Mr.	Ms.	M/s.											
Name of Guardian (In case of Minor)	Mr.	Ms.	M/s.											
Name of Second Applicant	Mr.	Ms.	M/s.											
Name of Third Applicant	Mr.	Ms.	M/s.											

### Section A - Trigger Event Selection

Sr. No.	Trigger (Please tick ü anyone)	In Value Terms		In percentage Terms
1.	Investment Value / Percentage	Trigger action when invested value reaches Rs. _____ (Example : Say the invested amount of Rs.10,000/- reaches Rs.11,000/- Trigger gets activated)	OR	Select % _____ (options 10% 15% 20% 25%) (Example : If the investment amount is Rs. 10,000/- and Tigger event chosen is say 10 % , then the entire Investment of Rs. 10,000/- along with the appreciation will be switched, when the investment grows by 10%)
OR				
2.	Capital Appreciation/ Percentage of appreciation	Trigger action when investment appreciates by Rs. _____ (Example : Say the investment amount appreciates by Rs.1,000/-, then the trigger gets activated and such capital appreciation will get switched)	OR	Select % _____ (options 10% 15% 20% 25%) (Example : If the investment amount is Rs. 10,000/- and Tigger event chosen is say 10%, then only the capital appreciation portion will be switched, when the investment grows by 10%)
OR				
3.	NAV/ Percentage Value	Trigger action when NAV is Rs _____ (Example : say at the time of investment, NAV is Rs. 11 and you would want the trigger to be activated when NAV reaches say Rs.12.50)	OR	Select % _____ (options 10% 15% 20% 25%) (Example: If the investment is done say at a NAV of Rs.11, and trigger event is chosen say NAV appreciation of 10%, then the entire investment will be switched when the NAV appreciates by 10%)
OR				
4.	BSE Sensex Value/ Percentage	Trigger action when BSE Sensex index crosses _____ (Example : say at the time of investment, BSE Sensex is 32000, the trigger event will be activated at your chosen BSE Sensex level, say is 34000)	OR	Select % _____ (options 10% 15% 20% 25%) Example : Trigger will be activated when the BSE Sensex Rises by 10% from the level on the date of your investment
OR				
5.	NSE 50 / Value/ Percentage	Trigger action when NSE 50 index crosses _____ (Example : say at the time of investment, NSE 50 is 10500, the trigger event will be activated at your chosen NSE 50, say is 11200)	OR	Select % _____ (options 10% 15% 20% 25%) Example : Trigger will be activated when the NSE 50 rises by 10% from the level on the date of your investment
OR				
6.	As on date	<input type="text" value="D"/> <input type="text" value="D"/> <input type="text" value="M"/> <input type="text" value="M"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/>	OR	<input type="text" value="D"/> <input type="text" value="D"/> <input type="text" value="M"/> <input type="text" value="M"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/>
Example : If the date opted by the investor above is 31 <sup>st</sup> May/2019, the same will get activated either on the above date OR on next business day, if the chosen date is a non business day.				

### Section B - Switch in Details

Name of the Scheme	Plan	Option & Sub option

I/We wish to opt for/revise Trigger / Alert option as indicated here below. Please note the following:

1. Please use separate forms for each transaction under each folio.
2. All the above Triggers to happen basis specific Transaction ONLY. Unit holders are requested to tick only one trigger situation/action mentioned under Sec A & B above, per transaction. In the event of multiple triggers for a particular transaction, the trigger request will be deemed to be cancelled.
3. Please note that trigger is an additional facility provided to the unit holders to save the time for completing the switch formalities on happening of a particular event. Trigger is not to be conceived as an assurance on part of Baroda Mutual Fund that the investor will manage to receive a particular sum of money / appreciation /and /or fixed % of sum.
4. NAVs of the schemes are declared at the close of the business day and hence value of the unit holder's holdings based on the end of day NAV will be considered as a base for activating the triggers. Accordingly, all the switches etc. will be done on the following business day, when the trigger event occurs.
5. A trigger once activated will not be reactivated in any other plan/scheme where the Switch happens or in the same plan which retains a part of the value or in case of normal redemption/switch before the trigger is activated. Triggers will be deactivated on redemption and/or switch and/or pledge of units.
6. This form duly completed must be submitted at the nearest Designated Investor Service Centre of **Baroda Mutual Fund** or **KFin Technologies Private Limited**.
7. Please contact the nearest Investor Service Centre or write to the Registrars, **Ms. KFin Technologies Private Limited**, Karvy Selenium, Tower B, Plot Nos. 31 & 32, Financial District, Nanakramguda, Serilingampally Mandal, Hyderabad - 500032 or send an email to [info@barodamf.com](mailto:info@barodamf.com), in case of non-receipt of account statement.
8. Trigger facility shall be registered after 7 calendar days of the receipt of trigger request.
9. Trigger facility shall be subject to applicable exit load, if any, in the Switch Out schemes.

Signature	1st Applicant Signature / Guardian Signature / POA Signature / Thumb Impression	2nd Applicant Signature / POA Signature / Thumb Impression	3rd Applicant Signature / POA Signature / Thumb Impression
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