

# TRIGGER FORM (REGISTRATION / CANCELLATION)

Sponsor: Edelweiss Capital Limited. Trustee Company: Edelweiss Trusteeship Company Limited. Investment Manager: Edelweiss Asset Management Limited.  
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REGISTRATION of

ALERT

CANCELLATION of

ALERT

## I UNIT HOLDER INFORMATION (Mandatory)

Folio No / Application No.

Name of the Sole/ 1st Applicant

## II TRANSACTION DETAILS (Mandatory)

Scheme  Plan  Option

Investment Amount

Transaction Date

## III TRIGGER OPTION

Please (✓)

- 1) Investment Value reaches ₹ \_\_\_\_\_ (if value already reached before registration, trigger request will be rejected)
- 2) Investment value appreciated by ₹ \_\_\_\_\_ from the trigger registration
- 3) Investment value appreciated by \_\_\_\_\_ % from the trigger registration
- 4) Stop Loss for ₹ \_\_\_\_\_ from trigger registration
- 5) Stop Loss for \_\_\_\_\_ % on investment value from trigger registration
- 6) NAV reaches ₹ \_\_\_\_\_ (if value already reached before registration, trigger request will be rejected)
- 7) NAV appreciated by \_\_\_\_\_ % from trigger registration
- 8) BSE Sensex Rise  /Fall  / Rise or Fall  (Please (✓) one only) by \_\_\_\_\_ points from trigger registration
- 9) BSE sensex reaches \_\_\_\_\_ points
- 10) NSE Nifty Rise  /Fall  / Rise or Fall  (Please (✓) one only) by \_\_\_\_\_ points from trigger registration
- 11) NSE Nifty reaches \_\_\_\_\_ points
- 12) Trigger Alert/Active on  or \_\_\_\_\_ number of days

### Alert based Triggers

Mode of Alerts  SMS (Please provide Mobile No.)

Email (Please provide email ID)

## IV DECLARATION

I/We have read & understood the Terms & Conditions of Trigger Facility & accept & abide by the same. I/we have received, read & understood the SID & SAI & Key Information Memorandum. If the trigger is not activated and/or implemented due to reasons, which are beyond the control of Edelweiss AMC, the AMC would not be held responsible. Trigger is only a facility extended by the AMC for the convenience of the unit holders and does not form part of any Scheme objectives.

Place : \_\_\_\_\_ Date

<input type="text"/> 1st Applicant	<input type="text"/> 2nd Applicant	<input type="text"/> 3rd Applicant
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# Trigger Simplified

## 1. What is a Trigger?

Trigger is a financial planning tool provided to the Unit holder for information (alert based trigger). The Unit holder can specify a specific event, which may be related to time or value or a specific event in advance and when this event takes place the trigger will get activated. This facility will "ALERT" (via Mail/SMS) the Unit holder after meeting the specifications provided by him/her.

## 2. How is a Trigger useful in financial planning?

Trigger facility helps the Unit holders to minimize the loss and/or timely book the profits.

## 3. Who sets/ defines the trigger?

The Unit holder has to set the Trigger.

## 4. Who executes the Trigger?

The AMC will execute the trigger on the Unit holder's behalf.

## 5. How does the Trigger work?

A Trigger will activate a transaction / alert when the event selected for has reached the value greater than/ equal to the specified particular value i.e. Trigger Point. Consider the example: Mr. A bought 1000 units at NAV of Rs 12.00. If Mr. A decides that he wants to redeem all his units when the NAV reaches Rs. 13.00, he has to keep track of the NAV daily and then send a redemption request within a stipulated time period to get the redemption returns at the NAV of the intended day. However, instead of keeping a track of the NAV everyday, Mr. A can set a Trigger: alert when NAV is Rs 13 or more. In this case, the AMC will keep track on behalf of Mr. A and will send alert on the day when the NAV reaches Rs 13 or more. Thus Trigger provides a convenient and useful financial planning tool.

## 6. What are the different kinds of triggers available to the Unit holders?

The various types of Triggers available to the Unit holder are:

**A. Time based Triggers:** Time based triggers are actioned on the day and/or date opted by the investor.

**B. Event-based Triggers:** Unit holder can also set triggers based on the occurrence of a particular external event that affects the value of investment. For example,

- Value of investment reaches or crosses a particular value
- Investment Value appreciates by specified %
- Capital appreciation of a particular amount
- NAV reaches or crosses a particular value
- NAV appreciates by specified %
- Redemption/Switch on a particular day or date
- BSE Sensex Rise/Fall by specific points
- BSE Sensex reaches specific points
- NSE NIFTY Rise/Fall by specific points
- NSE NIFTY reaches specific points
- Change in the value of units held by unit holders at least by certain percentage

## 7. Can a Unit holder apply for Trigger for multiple transactions in one Trigger request?

No. Use separate trigger application form for each transaction of a scheme/plan /option.

## 8. Will the intra-day points of BSE/NSE be considered for transactions on the day of the activation of the Trigger?

No. Only end of the day closing points of BSE/NSE will be considered for activating the trigger. Percentage rise/falls will be calculated by taking the base index as on the investment date.

## 9. What is the base for activation of the Trigger?

If the trigger is a time based trigger, the time event prescribed by the Unit holder would be the base of activation of the trigger. If the trigger is event based, the happening of the event prescribed by the Unit holder is the base for activation of the Trigger.

## 10. How is the application for a trigger made?

The application for a trigger is made by submitting the duly filled and signed Trigger application form at designated Investor Service Centers of Edelweiss Mutual Fund.

## 11. Where the Trigger Form is available?

Trigger Form is available at all designated Investor Service Centers of Edelweiss Mutual Fund and website [www.edelweissmf.com](http://www.edelweissmf.com).

## 12. Can a trigger once activated be set again?

Yes. You can select the repetitive trigger option available in Trigger Form. However, if the said option is not selected, a fresh request for activation of the same has to be made.

## 13. Can a set trigger be modified?

Yes, the Trigger can be modified by submitting a duly signed request letter. Three (3) days time is required to update the modified trigger request at our end.

## 14. Is there a limit on number of triggers options that can be set?

No. Unit holder can select multiple Trigger options available in the form. However, out of selected options, trigger will be actioned only for the option which meets the set criteria prior to other options.