INVEST FIRST

RBL BANK

Frequently Asked Questions

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- **Where can I call for any queries related to Invest First?**

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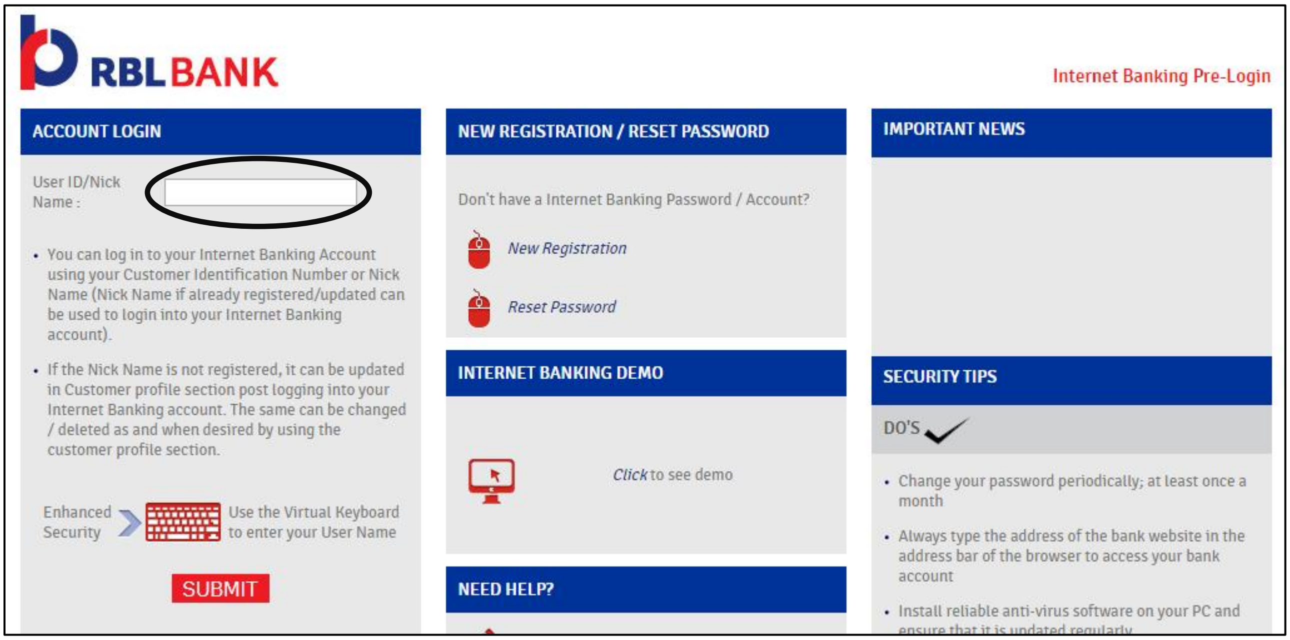
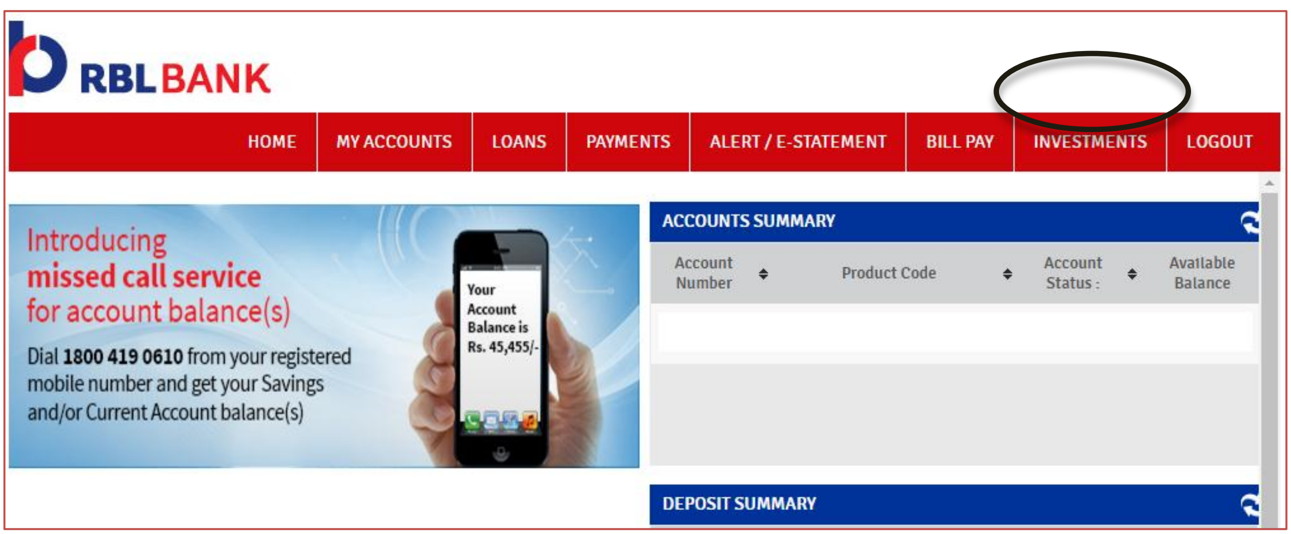
How do I login to Invest First?

Visit https://netbanking.rblbank.com/RetailBank/ and login to Internet Banking using your Customer Id and Internet Banking Password.



Where can I see Invest First section in Internet Banking?

Post logging into Internet Banking select **Investment Tab** in the tab section to view **Invest First**.



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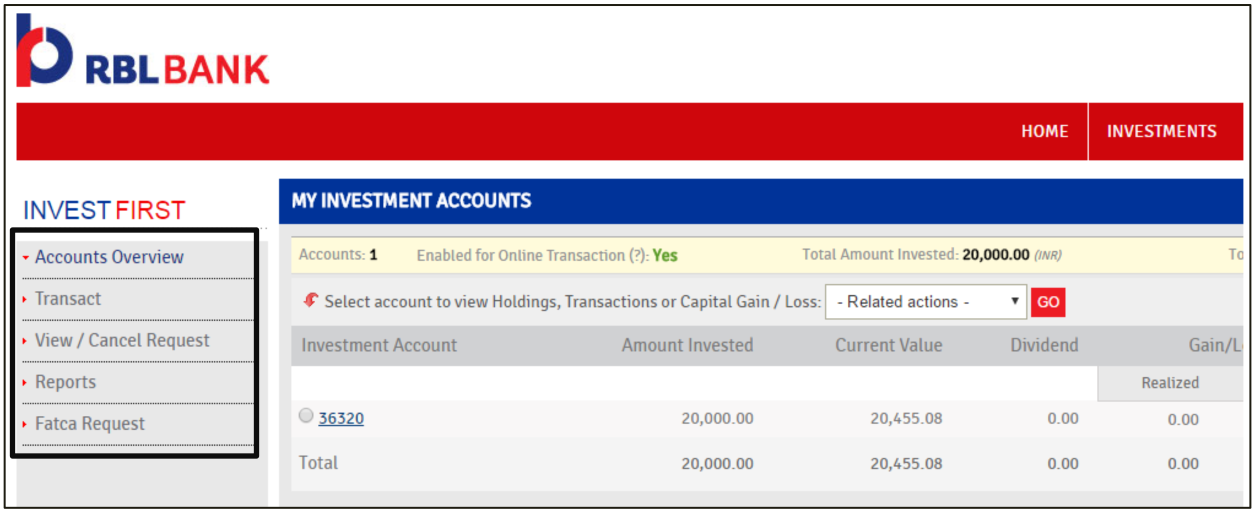
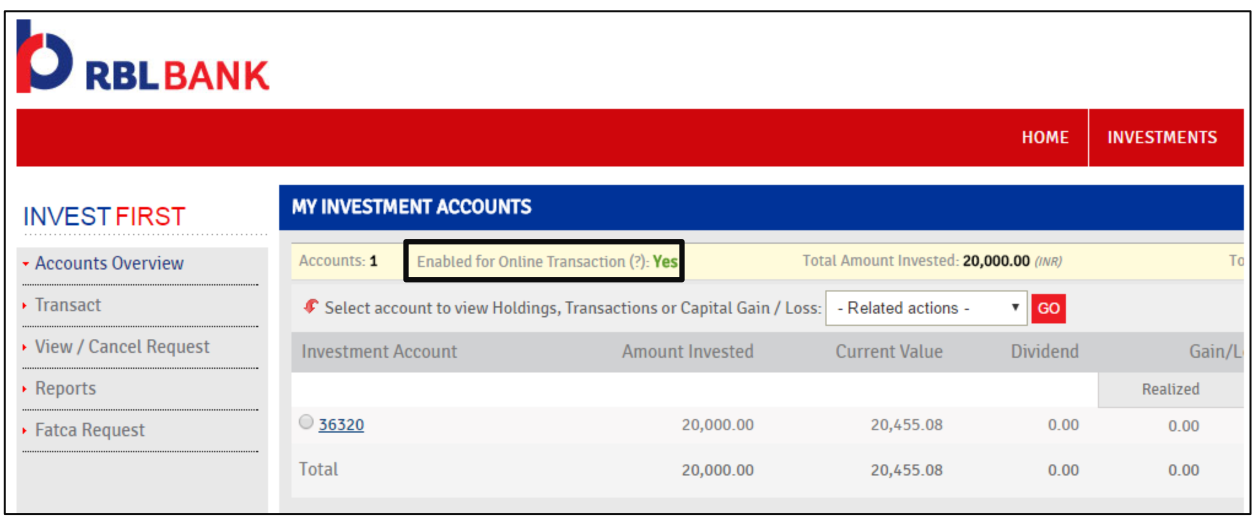
What services are available on Invest First?

You can view all services under **Invest First** on the menu bar on the left.



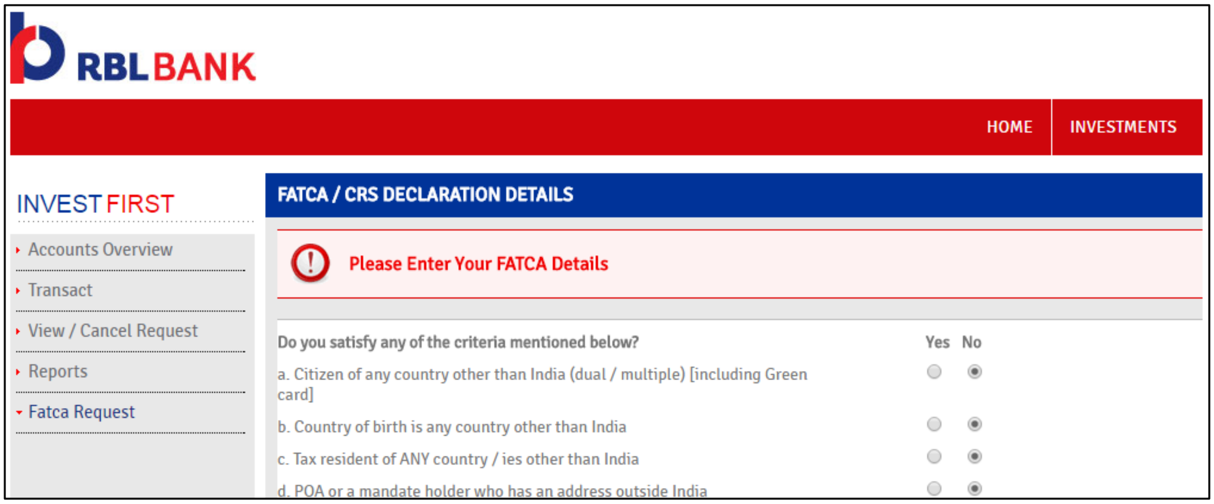
How do I check if I have been activated to invest online through Invest First?

Please check your status for **"Enabled for Online Transaction (?)"**. If you are activated then the status would be **"Yes"**. If the status is **"No",** please visit your nearest branch or call our Customer Care on **+91-22-61156300 to 99 or 18001238040**



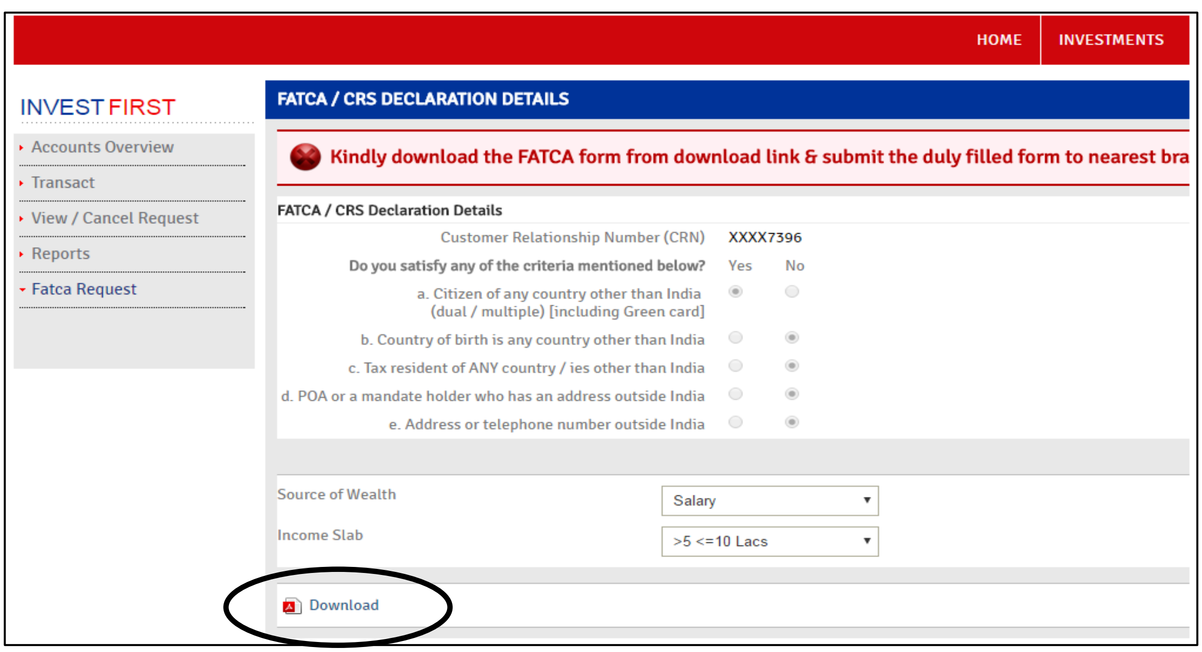
Are there any regulatory requirements (FATCA) to comply with?

Yes. Before one can start transacting, FATCA details are required to be submitted. Only those clients who are FATCA compliant are eligible to transact online through Invest First.



What if the details I have entered in the FATCA form are not FATCA compliant?

If you have clicked **"Yes"** for any of the questions on the FATCA form then you need to submit FATCA Declaration Form (Individuals). Kindly download this form from the link **marked below** and visit your nearest branch to submit the FATCA Declaration form (Individuals). For further queries visit nearest RBL Bank branch.



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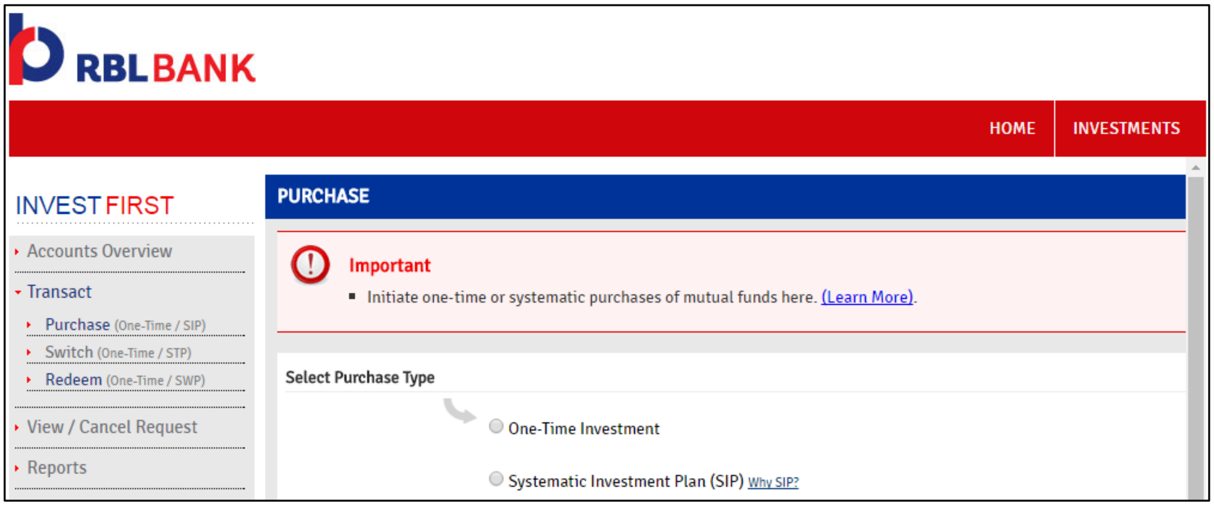
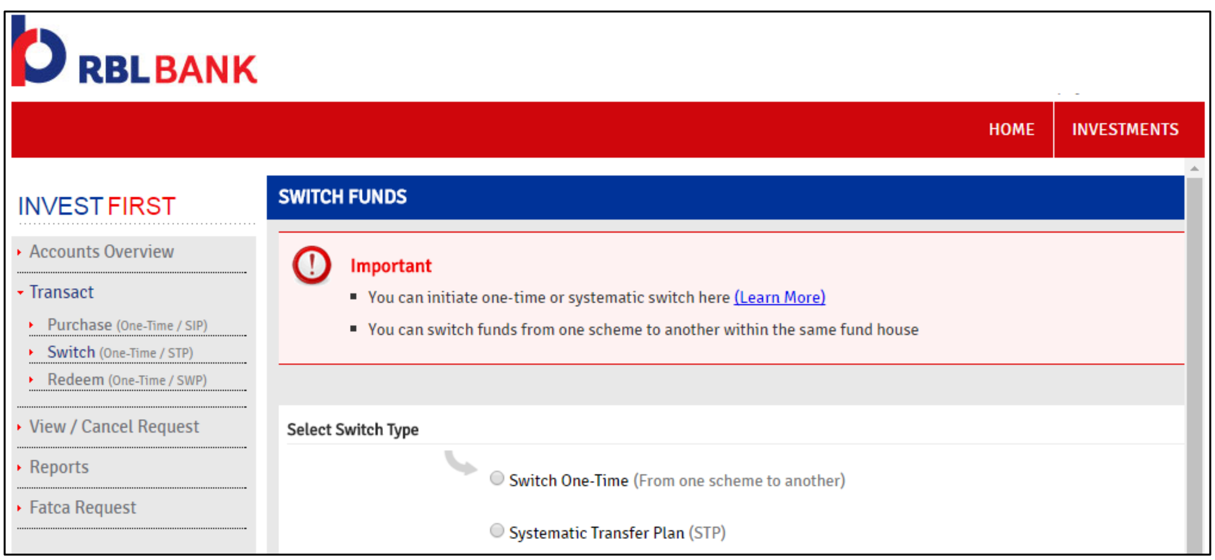
What kind of Mutual Fund transactions can I perform through Invest First?

Once activated, you can perform the following transactions,

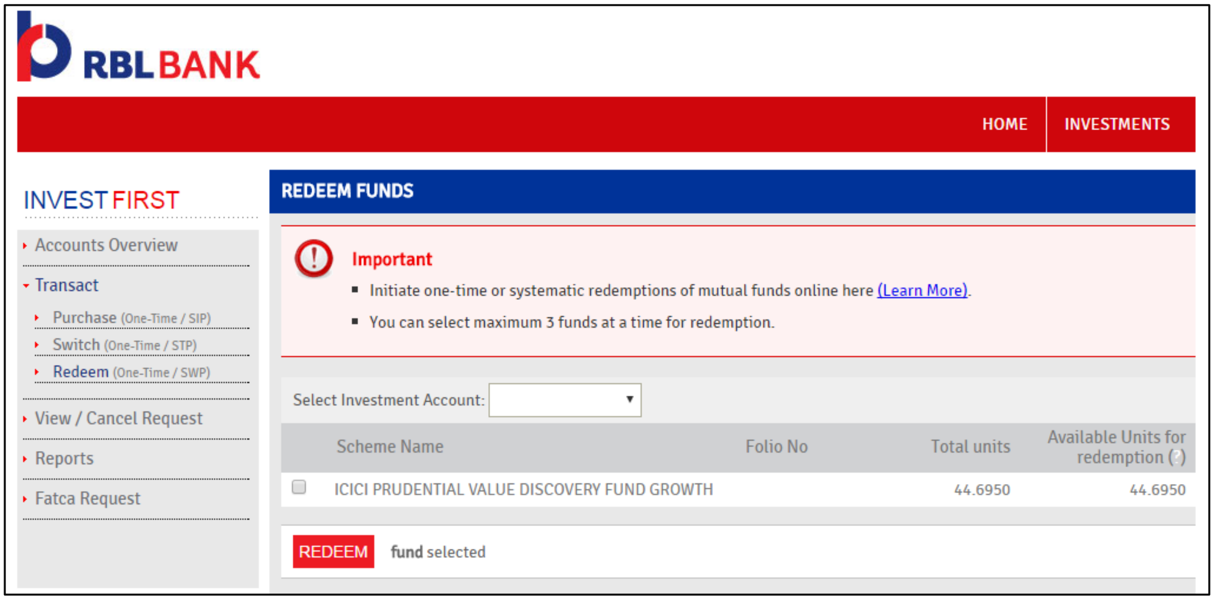
1) **Purchase :** Invest in Mutual Funds with either making a **Lump-sum (One-Time Investment)** or **Regularly by way of Systematic Investment Plan (SIP)**



2) **Switch :** Switch your existing investment either partially or fully in a **Single Transaction** (**One-Time Investment)** from one scheme to another or in a **Systematic manner over a period of time** (**Systematic Transfer Plan)**

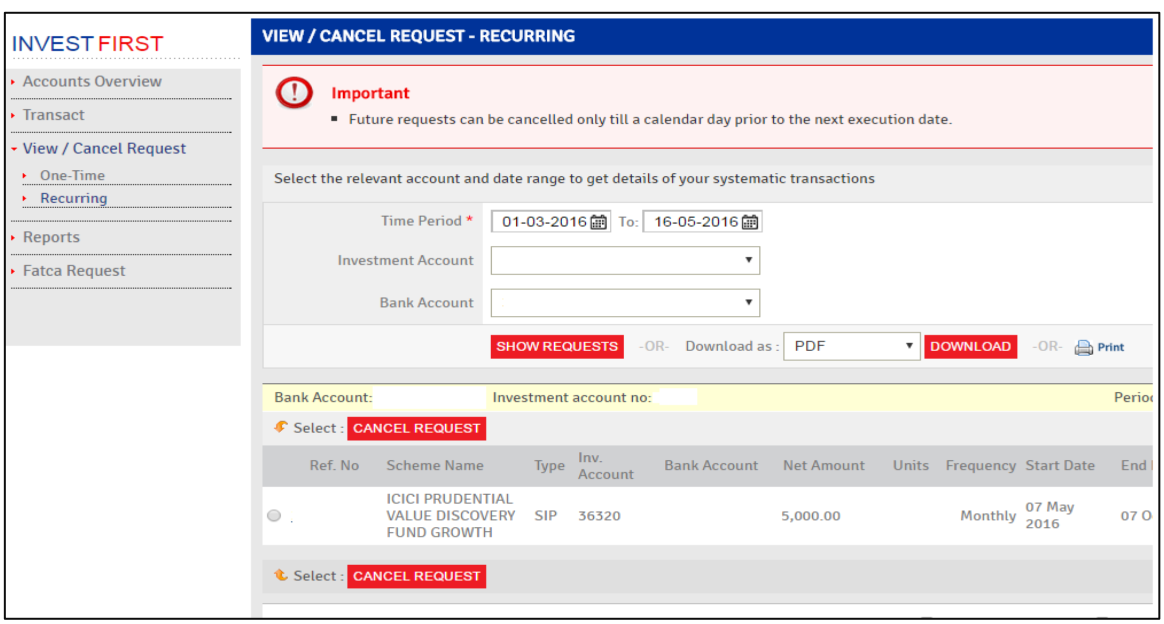


3) **Redemption:** You can redeem all Investments either fully or partially by selecting Redeem option in a Single Transaction or over a period of time **(Systematic Withdrawal Plan)**



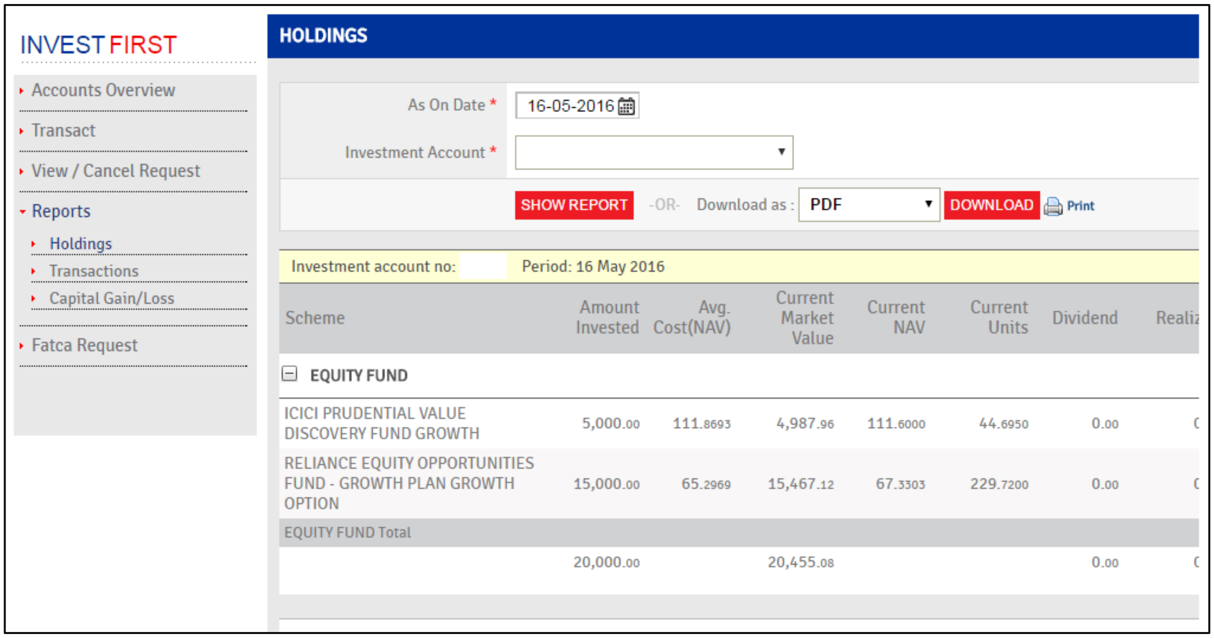
Where can I view or cancel my requests?

You can view your requests for **Lump-Sum (One-Time) or Recurring Investment** by clicking on the **"View/Cancel Request"** link in the menu bar on the left. Please note that you can cancel request only before the specific cut-off time applicable for the scheme.



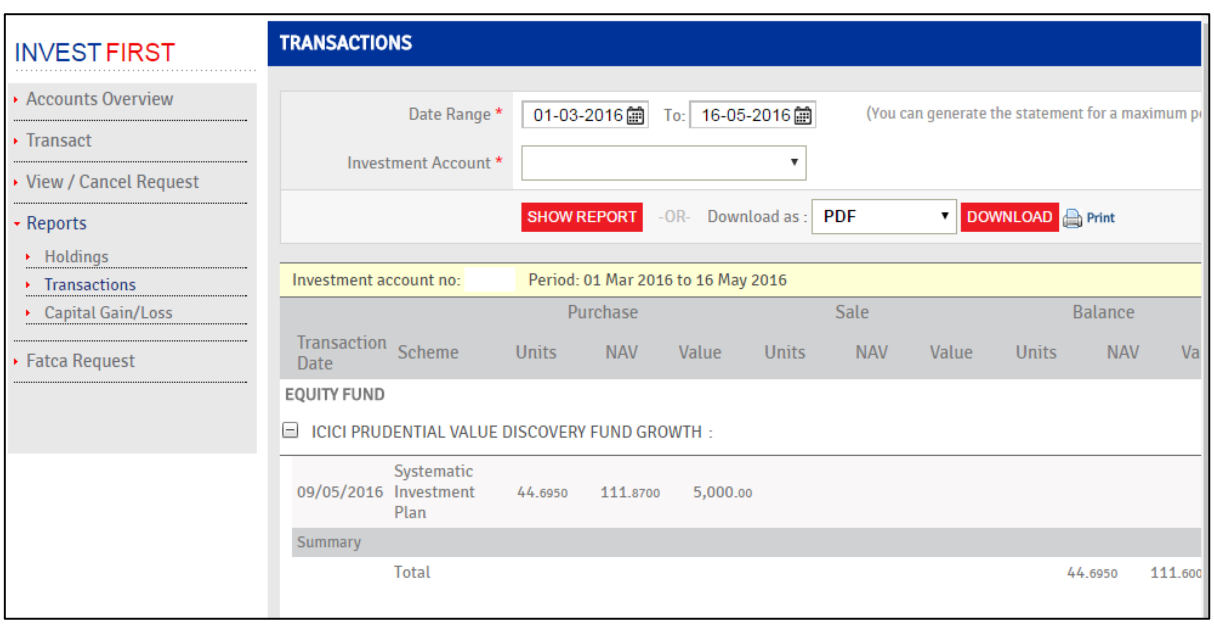
How do I know my holdings in Mutual Funds?

Under the reports section please click on link **“Holdings”** to view all your consolidated holdings.



Where can I view all my transactions?

Under the reports section please click on link **“Transactions”**. Select a date range for which you want to view transactions for.



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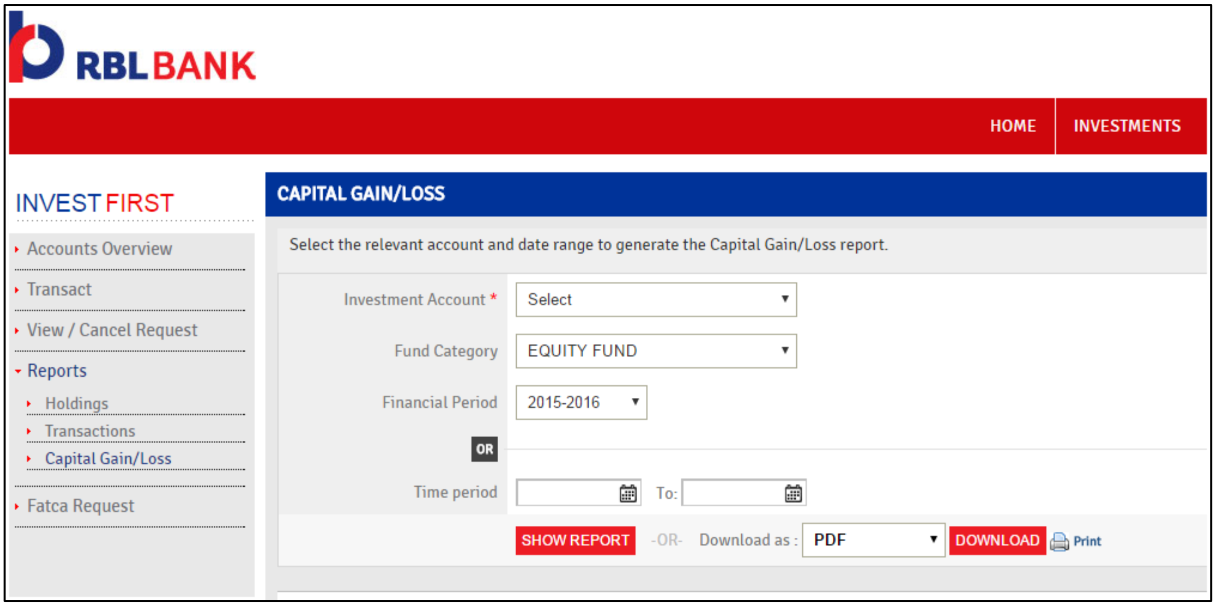
Where can view my Capital Gain/Loss Report?

You can view it under Reports section by clicking on the Capital Gain/Loss link in the menu bar on the left.



How can I shift my offline Investments done with RBL Bank to Online mode?

Please fill the offline to online form, attached in **Annexure 1**, to shift your offline investments with RBL Bank to online Mode. The Form has to be submitted to your nearest RBL Bank branch. Once offline folios have been successfully converted into online mode, one can transact online for these folios. Please note that close ended schemes and on-going SIPs cannot be transferred from offline to online. TAT for conversion of Investments from offline to online is 10 working days under normal scenario, subject to validity of Forms & Signatures.

Where can I call for any queries related to Invest First?

Please visit calls our Customer Care on **+91-22-61156300 to 99 or 18001238040 or visit you nearest branch or contact you dedicated Relationship Manager** for any further queries on **Invest First.**

ANNEXURE 1

MF Offline to Online Conversion Form

Branch Manager
RBL Bank Ltd.
Address
City

Dear Sir / Madam

I/We will like to convert the following of my /our existing Offline Folio(s) with RBL Bank Broker code into Online Folios with RBL Bank to transact online under the Invest First facility. Kindly do the needful as per details provided below:

Sr No.	Folio No.	Scheme Name	Option

____________ Sd/ 1st Holder	____________ Sd/ 2nd Holder	____________ Sd/ 3rd Holder
____________ Name of 1st Holder	____________ Name of 2nd Holder	____________ Name of 3rd Holder
CIF: ___________ ID 1st Holder	CIF: ____________ ID 2nd Holder	CIF: __________ ID 3rd Holder

Place: ____________ Date:____________

Note:

1. Applicable only for Folios with Mode of Holding Singly and Anyone or Survivor basis
2. Folios with NIL balance and ongoing SIP will not be converted to Online mode
3. Close ended schemes will not be converted from Offline to Online mode

For Bank use only

Signature : ___________ Sd/: _________________ Employee Id: ___________
Verified by ____________ of Employee
(Name of Employee)