

SWITCH REQUEST

Date:

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Distributor Name: _____

Folio No.: _____

To
ABAKKUS ASSET MANAGER PRIVATE LIMITED
(Formerly known as Abakkus Asset Manager LLP)
Abakkus Corporate Center, Param House,
6th Floor, Shanti Nagar, Near Grand Hyatt,
Off Santacruz Chembur Link Road, Santacruz East, Mumbai – 400 055.

Subject: Switch Request : Gift Case

Dear Sir,

I/We the undersigned has/ have executed Discretionary Portfolio Management Services (DPMS) Agreement with Abakkus ABAKKUS ASSET MANAGER PRIVATE LIMITED (Formerly known as Abakkus Asset Manager LLP).

I/We wish to switch the Investment Approach to the extent mentioned herein after.

From	Investment Approach/ Folio No.:		
Entire Amount	<input type="checkbox"/>		
Partial Amount	<input type="checkbox"/>	INR Rs. _____	(Rupees in figures)
		INR Rs. _____	(Rupees in words)
To	Investment Approach/ Folio No.:		
Frequency			

I/We confirm that I/We have read and understood all the terms and condition associated with this change and I/We accept and agree to be bound by the same.

In all other aspects the terms of Client Agreement executed with ABAKKUS ASSET MANAGER PRIVATE LIMITED (Formerly known as Abakkus Asset Manager LLP) shall remain unaffected and be in full force and effect.

SIGNATURES

1st Applicant Name/Authorised Signatory

2nd Applicant Name/Authorised Signatory

3rd Applicant Name/Authorised Signatory

PAN Card No.:

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PAN Card No.:

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PAN Card No.:

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Encl: 1.Term Sheet of _____

2. Fees and Charges

TERM SHEET - INVESTMENT APPROACH: _____

Sr. No.	Particulars	Description
1	Investment Objective	
2	Description of types of securities e.g. equity or debt, listed or unlisted, convertible instruments, etc.	
3	Basis of selection of such types of securities as part of the investment approach	
4	Allocation of portfolio across types of securities	
5	Indicative tenure or investment horizon	
6	Appropriate benchmark to compare performance and basis for choice of benchmark	
7	Risks associated with the investment approach	
8	Other salient features, if any	

I/We confirm that I/We have read and understood all the terms and condition and I/We accept and agree to be bound by the same. In all other aspects the terms of Client Agreement executed with ABAKKUS ASSET MANAGER PRIVATE LIMITED (Formerly known as Abakkus Asset Manager LLP) shall remain unaffected and be in full force and effect.

SIGNATURES

1st Applicant Name/Authorised Signatory

2nd Applicant Name/Authorised Signatory

3rd Applicant Name/Authorised Signatory

PAN Card No.:

PAN Card No.:

PAN Card No.:

NOTE

I/We also agree and confirm that I/We have been furnished and delivered all monthly / quarterly / annual reports, audited financial statements, statement of accounts, investor charter, monthly investor factsheets, regulatory disclosures including but not limited to Disclosure Document, Most Important Terms and Conditions (MITC), etc. as required under applicable SEBI regulations read along with amendments & circulars issued from time to time.