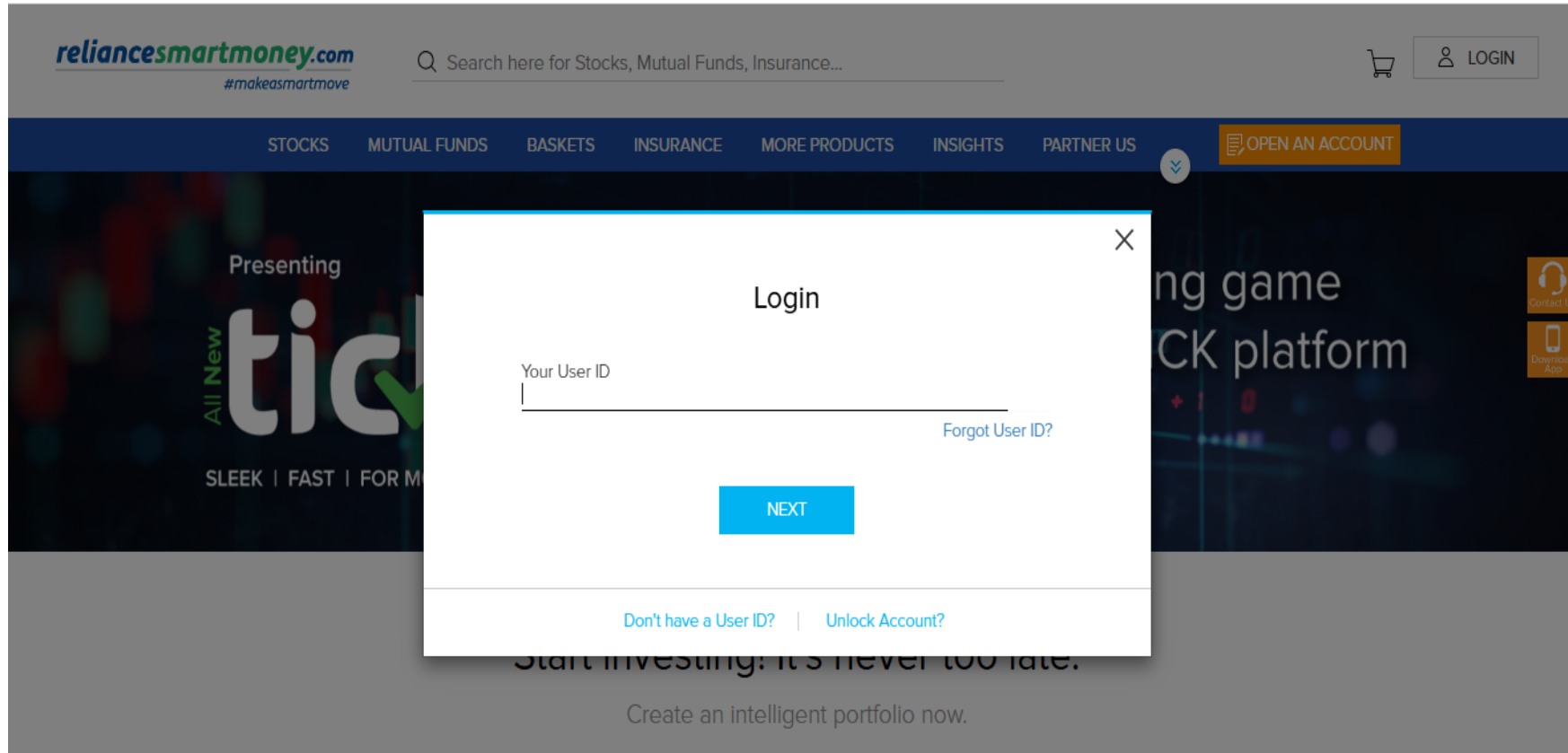


<b>Sr. No.</b>	<b>Topic</b>	<b>Page No.</b>
<b>1</b>	<b>Title Page</b>	<b>2</b>
<b>2</b>	<b>RSM Web Login</b>	<b>3-5</b>
<b>3</b>	<b>RSM Web Profile Details page</b>	<b>6</b>
<b>4</b>	<b>Dashboard</b>	<b>7</b>
<b>5</b>	<b>Profile</b>	<b>8-9</b>
<b>6</b>	<b>Income</b>	<b>11-12</b>
<b>7</b>	<b>Contact Info</b>	<b>14-24</b>
<b>8</b>	<b>Address</b>	<b>26-40</b>
<b>9</b>	<b>Bank</b>	<b>42-50</b>
<b>10</b>	<b>Trading Segment-Account Aggregator &amp; Manual</b>	<b>52-63</b>
<b>11</b>	<b>Nominee Details</b>	<b>65-74</b>
<b>12</b>	<b>The End- Thank You page</b>	<b>75</b>

***reliancesmartmoney.com***  
*#makeasmartmove*

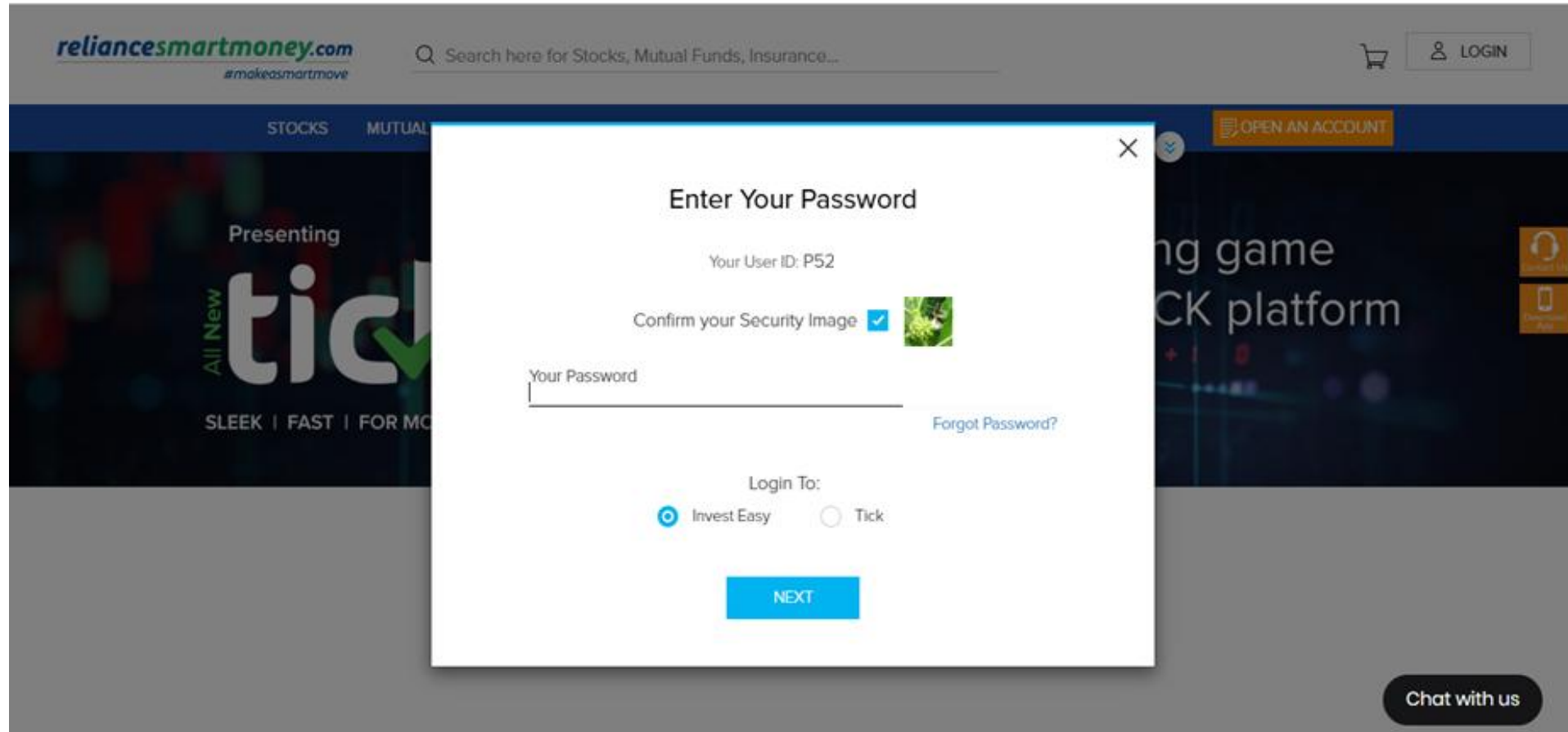
# Digital Modification

# Log in to the RSM Website



- To Login in RSM Web Enter Your Client Code and click on NEXT

# Log in to the RSM Website



- Enter the correct password and click on NEXT

# Security Question

The screenshot shows the Reliance Smart Money website interface. At the top, there is a search bar with the text "Search here for Stocks, Mutual Funds, Insurance...". To the right of the search bar are icons for a shopping cart and a "LOGIN" button. Below the search bar is a navigation menu with links for "STOCKS", "MUTUAL FUNDS", "BASKETS", "INSURANCE", "MORE PRODUCTS", "INSIGHTS", and "PARTNER US". A prominent orange button labeled "OPEN AN ACCOUNT" is also visible. The main content area features a dark background with the text "Presenting All New **tic** SLEEK | FAST | FOR M" and "ng game CK platform". On the right side, there are three icons: "Contact Us", "Download App", and "Call With Us". A white modal window titled "Answer Your Security Questions" is overlaid on the page. It contains two questions: "Last four digits of your driving licence number? (e.g. 1234, 9876, etc)" and "What is your grandfather's name?". Each question has a "Your Answer" field. At the bottom of the modal, there are "BACK" and "LOGIN" buttons, and a link for "Forgot Security Questions?".

- Answer the security questions and After login to the RSM website, it will redirect to the Dashboard page.

The screenshot shows the 'PROFILE DETAILS' page on the Reliance Smart Money website. The page layout includes a top navigation bar with links for Stocks, Mutual Funds, Baskets, Insurance, More Products, Insights, and Partner Us. A sidebar menu on the left lists options like Portfolio, Funds Transfer, Transactions, Historical Reports, Services, and Profile Details. The main content area displays a table of profile information with the following details:

PROFILE DETAILS			Last Login: 01-01-0001 12:00:00 AM
User ID	Email ID	Mobile Number	
Date of Birth	Permanent Address	Correspondence Address	
Client Code	PAN Number	Income Range <a href="#">Update</a>	
Non POA ⓘ <a href="#">Change TPN</a>			
Account (Click to Close)	<a href="#">Digital Modification</a>	KRA Status - <b>KRA Validated</b> Sub KRA Status - <b>Modification Validated</b> ( <a href="#">Click here to know more</a> )	

At the bottom of the profile details, there are links for downloading forms: [KYC form](#), [POA](#), [Supporting Documents](#), and [Change request form](#). A note states: "Note \* - For all changes other than Email Address & Mobile Number, please fill the Change Request Form and submit the duly signed copy to the nearest branch." A "Chat with us" button is also visible on the right side.

- Under Profile Details, an Option of Digital Modification will be displayed, Clicks on the same

The screenshot shows the Reliance Smart Money dashboard. At the top left is the logo 'reliance**smart**money.com #makeasmartmove'. At the top right, it says 'HI' and 'What do you want to update' with a red 'Logout' link. Below this is a section titled 'What do you want update?' containing seven update options, each with an icon, a title, a description, and a right-pointing arrow. The 'Profile' option is highlighted with a green border. The options are: Profile (You can update Profile details), Income (You can update Income details), Contact Info (You can update Mobile or Email ID), Address (You can update your address), Bank (You can add/update bank details), Trading Segment (You can update trading segments), and Nominee Details (You can update nominee details).

- Here, clients can check all the details that are required to get updated.
- Click on Profile to update the Profile details

The screenshot shows the Reliance Smart Money website interface. At the top left is the logo 'reliancesmartmoney.com #makeasmartmove'. At the top right, the user is logged in as 'Hi POOJA YADURAI YADAV' with a 'Logout' link. The main content area is titled 'What do you want update?' and contains three options: 'Profile' (with a document icon), 'Address' (with a location pin icon), and 'Nominee Details' (with a document icon). The 'Profile' option is selected, and a modal window titled 'Profile Details' is open. The modal has a close button (X) in the top right corner. It is divided into two sections: 'Existing Profile Details' and 'Update Profile Details'. The 'Existing Profile Details' section shows a table with two rows: 'Occupation' with the value 'Private Sector Service' and 'Marital Status' with the value 'Unmarried'. The 'Update Profile Details' section has two dropdown menus: 'Occupation \*' with the placeholder text 'Select Occupation' and 'Marital Status \*' with the placeholder text 'Select Marital Status'. Below these dropdowns is an orange 'Submit' button.

- Existing Profile details will be displayed on the screen.
- To update the new details or same details select Occupation and Marital status from the dropdown.
- Click on Submit.



Your request for Re-Ekyc has been received by us.  
Our team will review this application and revert within 24 Hrs.

- Once Occupation and Marital Status is updated, request will automatically get submitted.
- Esign is not required for Profile updation.

## What do you want update?



Profile

You can update Profile details



Income

You can update Income details



Contact Info

You can update Mobile or Email ID



Address

You can update your address



Bank

You can add/update bank details



Trading Segment

You can update trading segments



Nominee Details

You can update nominee details



reliancesmartmoney.com  
#makeasmartmove

Hi POOJA YADURAI YADAV  
What do you want to update  
[Logout](#)

What do you want update?

**Profile**  
You can update Profile details

**Address**  
You can update your address

**Nominee Details**  
You can update nominee details

**Contact Info**  
You can update Mobile or Email ID →

**Trading Segment**  
You can update trading segments →

**Income Details** ✕

Existing Income Details

Annual Income	1-5 LAC
---------------	---------

Update Income Details

Income Range \*  
Select Income

Upload Income Proof

Networth Amount (Optional)

Submit

- Existing Income details will display on the screen, to update the new income details select the income from the income range dropdown.
- Click on Submit.
- Upload income proof and Net worth Amount is completely optional.



Your request for Re-Ekyc has been received by us.  
Our team will review this application and revert within 24 Hrs.

- Once Income Detail is updated, request will automatically get submitted.
- Esign is not required for Income Detail updation.

## What do you want update?



Profile

You can update Profile details



Income

You can update Income details



Contact Info

You can update Mobile or Email ID



Address

You can update your address



Bank

You can add/update bank details



Trading Segment


You can update trading segments



Nominee Details

You can update nominee details



 Contact Modification

Existing Mobile No	10	<a href="#">Modify</a>	Existing Email No	@gmail.com	<a href="#">Modify</a>
--------------------	----	------------------------	-------------------	------------	------------------------

[Continue/E-sign](#)

- Existing Mobile number of Client in Reliance will display on the screen.
- To update new mobile, click on Modify
- Mobile number should be new, and it should not belong to any existing active account mobile number.

reliancesmartmoney.com  
#makeasmartmove

Hi  
Update mobile or email  
[Logout](#)

### Contact Modification

Existing Mobile No	10	Modify	Existing Email No	@gmail.com	Modify
--------------------	----	--------	-------------------	------------	--------

#### Update Mobile Number

Enter New Mobile Number

Select Mobile Relation


Self

I agree to the [Terms and Conditions](#)

Get OTP

Continue/E-sign

- Enter the new mobile number and select the appropriate relation from the dropdown list that the mobile number belongs to- SELF
- Tick in the checkbox of terms and conditions
- Click on Get OTP
- Client will receive 5-digit OTP on their new number

 **Contact Modification**


Existing Mobile No	10	Existing Email No	@gmail.com	<a href="#">Modify</a>
<b>Mobile Modified Details</b>				
New Mobile Number (Not Verified)	:16			
New Mobile Relation				

**Update Mobile Number**

Otp send to Mobile Number

[Verify OTP](#) [Resend OTP](#) [Continue/E-sign](#)

- Enter the OTP and click on Verify OTP
- If Client has not received an OTP, click on Resend OTP

 Contact Modification

Existing Mobile No	.10	<a href="#">Modify</a>	Existing Email No	@gmail.com	<a href="#">Modify</a>
<b>Mobile Modified Details</b>					
New Mobile Number (Verified)	.16				
New Mobile Relation	Self				


[Continue/E-sign](#)

- Once Mobile number is updated, Same will be displayed in New Mobile number as verified.
- If Client want to only updated Mobile number they can click on Continue E-Sign Tab and Proceed with the Esign Process.

Hi POOJA YADURAI YADAV

Update mobile or email

[Logout](#)

 Contact Modification

Existing Mobile No	10	<a href="#">Modify</a>	Existing Email No	@gmail.com	<a href="#">Modify</a>
Mobile Modified Details					
New Mobile Number (Verified)	.16				
New Mobile Relation	Self				

[Continue/E-sign](#)

- Existing Email Id of Client in Reliance will display on the screen.
- To update new email id, click on Modify
- Email ID should be new, it should not belong to any Active account.

### Contact Modification

Existing Mobile No	10	<a href="#">Modify</a>	Existing Email No	@gmail.com	<a href="#">Modify</a>
Mobile Modified Details					
New Mobile Number (Verified)	16				
New Mobile Relation	Self				

#### Update Email Id


Enter New Email Id

Select Email Relation

I agree to the [Terms and Conditions](#)

[Continue/E-sign](#)

- Enter the new email ID and select the relevant relation from the dropdown list to indicate who the email ID belongs to-SELF
- Tick in the checkbox of terms and conditions.
- Click on Get OTP

 Contact Modification

Existing Mobile No	i10	Modify
Existing Email No	@gmail.com	

Email Modified Details	
New Email Id (Not Verified)	@gmail.com
New Email Relation	

**Update Email Id**

Otp send to Email Id

[Verify OTP](#) [Resend OTP](#)

[Continue/E-sign](#)

- Client will receive 5-digit OTP on their new email id, enter the OTP.
- Click on Verify OTP
- If client is not receiving OTP click on Resend OTP.
- Once Email ID is updated client can click on Continue to E-sign tab and proceed for esign.

Hi

[View](#) [Edit](#) and [Digital sign](#)

[Logout](#)



You are just one step away from updating your details.


[eSign KYC Form](#)

I hereby give my consent to use my Aadhar/Virtual ID details (as applicable) for the purpose of e-signing my re-ekyc form

[Download PDF](#)

[If you want to Edit](#)

- To download the Pre Esign pdf, click on **Download PDF**
- To make any changes- Click on **If you want to Edit**
- For Esign click on **Esign KYC Form**




**Reliance Securities Ltd. has requested to Digitally sign the document**  
Transaction ID: 96F0208CE0074F31B83E6840AE3FBE52 dated 2025-02-10T17:19:44

Select Lang ▼ Play audio Stop audio



Please click on the checkbox and enter Aadhaar/Virtual ID

I hereby authorize Protean eGov Technologies Limited (formerly NSDL e-Governance Infrastructure Limited) to -

1. Use my Aadhaar / Virtual ID details (as applicable) **eSigning of documents for Account opening** for/with **Reliance Securities Ltd.** and authenticate my identity through the Aadhaar Authentication system (Aadhaar based e-KYC services of UIDAI) in accordance with the provisions of the Aadhaar (Targeted Delivery of Financial and other Subsidies, Benefits and Services) Act, 2016 and the allied rules and regulations notified thereunder and for no other purpose.
2. Authenticate my Aadhaar / Virtual ID through OTP or Biometric for authenticating my identity through the Aadhaar Authentication system for obtaining my e-KYC through Aadhaar based e-KYC services of UIDAI and use my Photo and Demographic details (Name, Gender, Date of Birth and Address) **eSigning of documents for Account opening** for/with **Reliance Securities Ltd.** .
3. I understand that Security and confidentiality of personal identity data provided, for the purpose of Aadhaar based authentication is ensured by Protean eGov Technologies Limited and the data will be stored by Protean eGov Technologies Limited till such time as mentioned in guidelines from UIDAI from time to time.

VID/Aadhaar:  

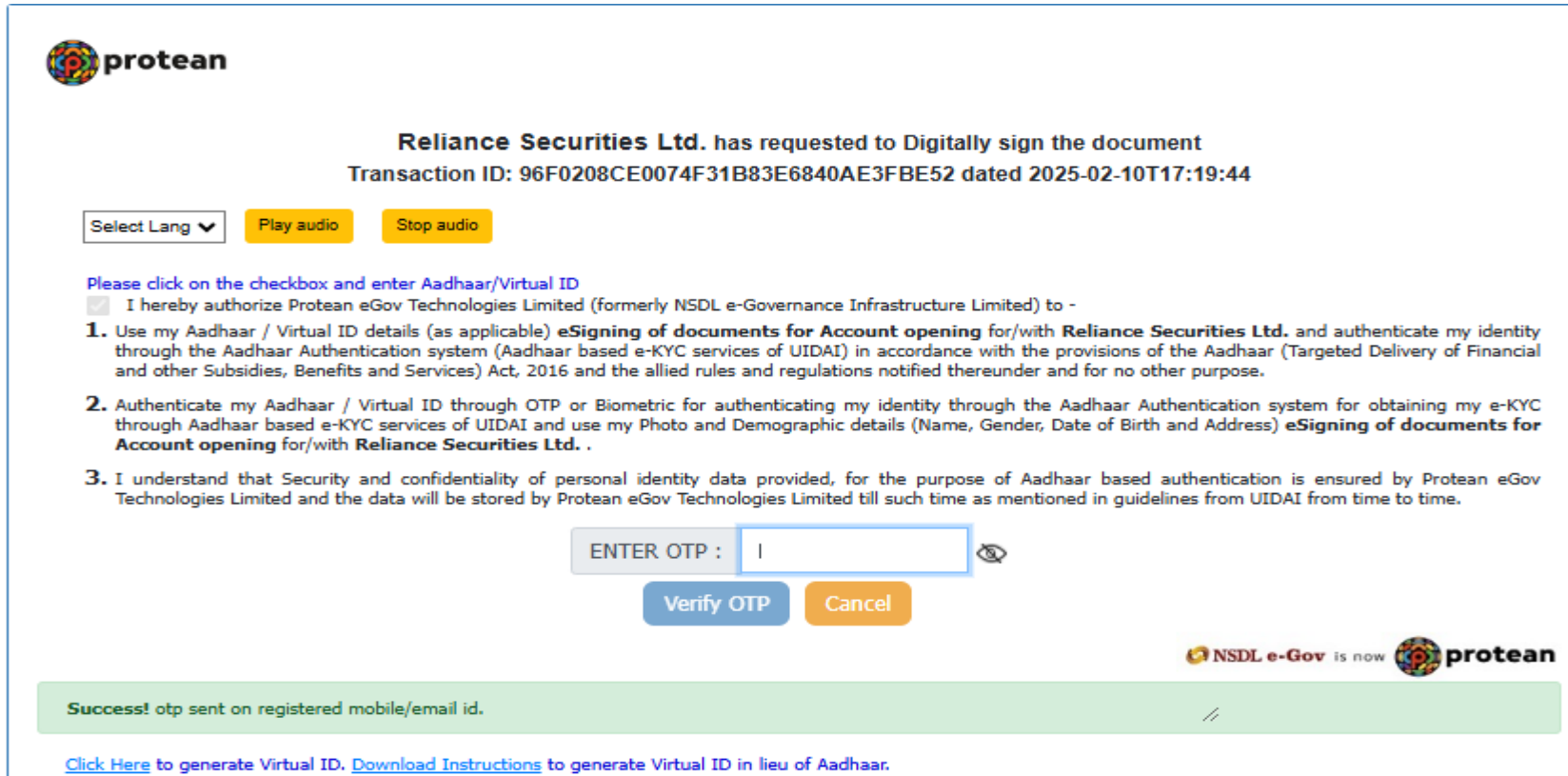
SEND OTP CANCEL


 NSDL e-Gov is now  protean

[Click Here](#) to generate Virtual ID. [Download Instructions](#) to generate Virtual ID in lieu of Aadhaar.

➤ Click in the check box, enter 12-digit, Aadhaar number

➤ Click on SEND OTP




 **protean**

**Reliance Securities Ltd. has requested to Digitally sign the document**  
Transaction ID: 96F0208CE0074F31B83E6840AE3FBE52 dated 2025-02-10T17:19:44



Select Lang ▼ Play audio Stop audio

Please click on the checkbox and enter Aadhaar/Virtual ID  
 I hereby authorize Protean eGov Technologies Limited (formerly NSDL e-Governance Infrastructure Limited) to -

1. Use my Aadhaar / Virtual ID details (as applicable) **eSigning of documents for Account opening for/with Reliance Securities Ltd.** and authenticate my identity through the Aadhaar Authentication system (Aadhaar based e-KYC services of UIDAI) in accordance with the provisions of the Aadhaar (Targeted Delivery of Financial and other Subsidies, Benefits and Services) Act, 2016 and the allied rules and regulations notified thereunder and for no other purpose.
2. Authenticate my Aadhaar / Virtual ID through OTP or Biometric for authenticating my identity through the Aadhaar Authentication system for obtaining my e-KYC through Aadhaar based e-KYC services of UIDAI and use my Photo and Demographic details (Name, Gender, Date of Birth and Address) **eSigning of documents for Account opening for/with Reliance Securities Ltd.** .
3. I understand that Security and confidentiality of personal identity data provided, for the purpose of Aadhaar based authentication is ensured by Protean eGov Technologies Limited and the data will be stored by Protean eGov Technologies Limited till such time as mentioned in guidelines from UIDAI from time to time.

ENTER OTP :  

Verify OTP Cancel

 NSDL e-Gov is now  **protean**

Success! otp sent on registered mobile/email id.

[Click Here](#) to generate Virtual ID. [Download Instructions](#) to generate Virtual ID in lieu of Aadhaar.

- Client will receive 6-digit, OTP on their Aadhaar registered Mobile number & Email ID
- Enter OTP and click on Verify OTP



Your request for Re-Ekyc has been received by us.  
Our team will review this application and revert within 24 Hrs.

- Once esign is completed for contact info, request will get submitted successfully.

Hi

What do you want to update

[Logout](#)

## What do you want update?



Profile

You can update Profile details



Income

You can update Income details



Contact Info

You can update Mobile or Email ID



Address

You can update your address



Bank

You can add/update bank details



Trading Segment


You can update trading segments



Nominee Details

You can update nominee details





 Address Modification Continue/E-sign

Existing Address Details

Address	Thane		
City	Thane	State	Maharashtra
Country	INDIA	Pincode	401209

- Client's existing address in Reliance records will be displayed on the screen.
- click on Modify to update address as per Aadhaar Card.

Please upload Signature \*

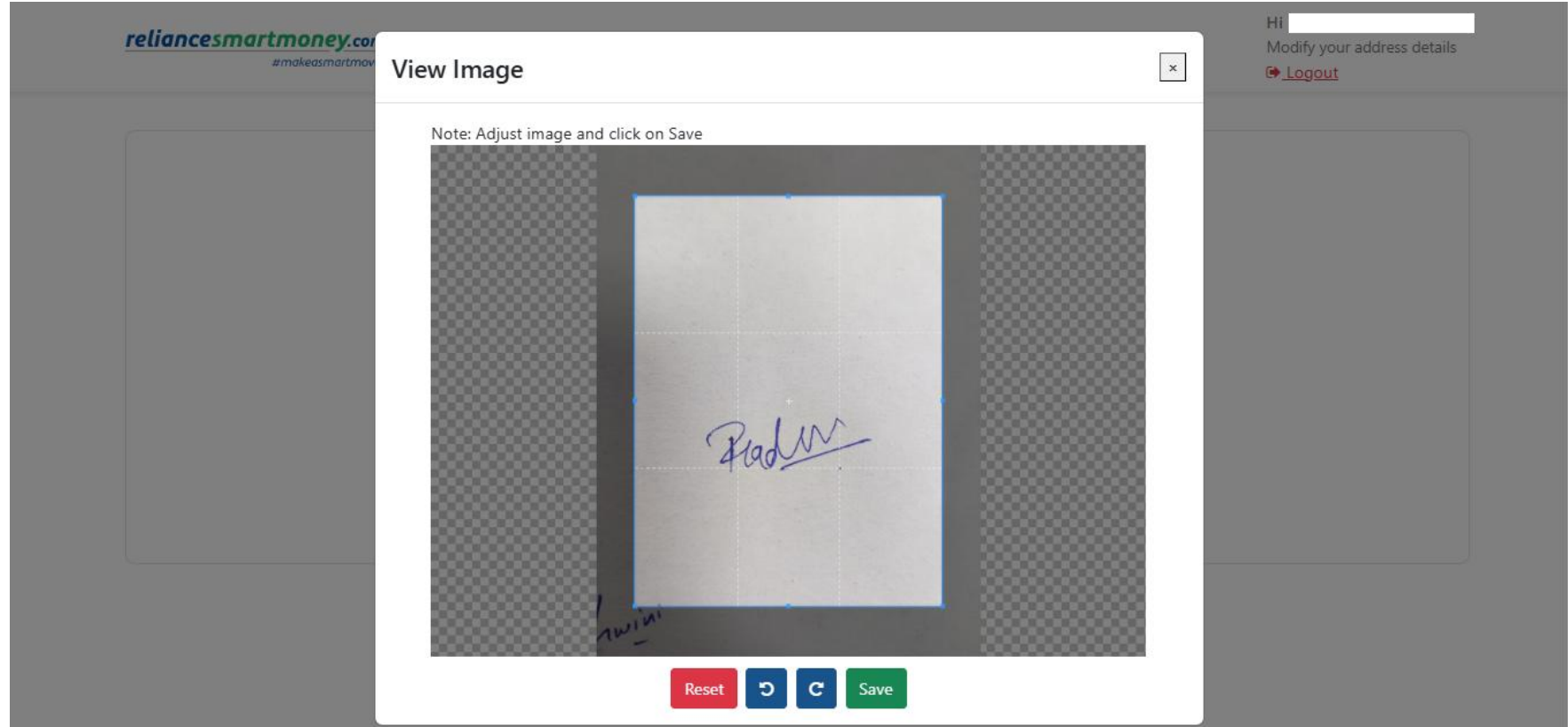


Please upload the files only in jpg/jpeg/png format

**Note:** Please sign on blank paper with blue pen and upload the signature

Proceed to KYC

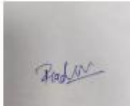
- Upload the signature by selecting it from the gallery or capturing a new one directly using the camera. Supported formats: JPG, JPEG, PDF
- Signature should be on blank paper with blue pen.



- Client can crop and rotate the sign, once done click on Save to upload the same successfully.

Please upload Signature \*

Sign Proof uploaded successfully [Re-Upload](#)



**Note:** Please sign on blank paper with blue pen and upload the signature

[Proceed to KYC](#)

- Once sign is uploaded click on Proceed to KYC to update the address as per Aadhaar Card.

Mer Pehchaan  
SINGLE SIGN-ON SERVICE  
DigiLocker

Sign In to your account via **DigiLocker**

Mobile Username **Others**

Aadhaar

Enter ID / Number\*

PIN\*

[Forgot security PIN?](#)

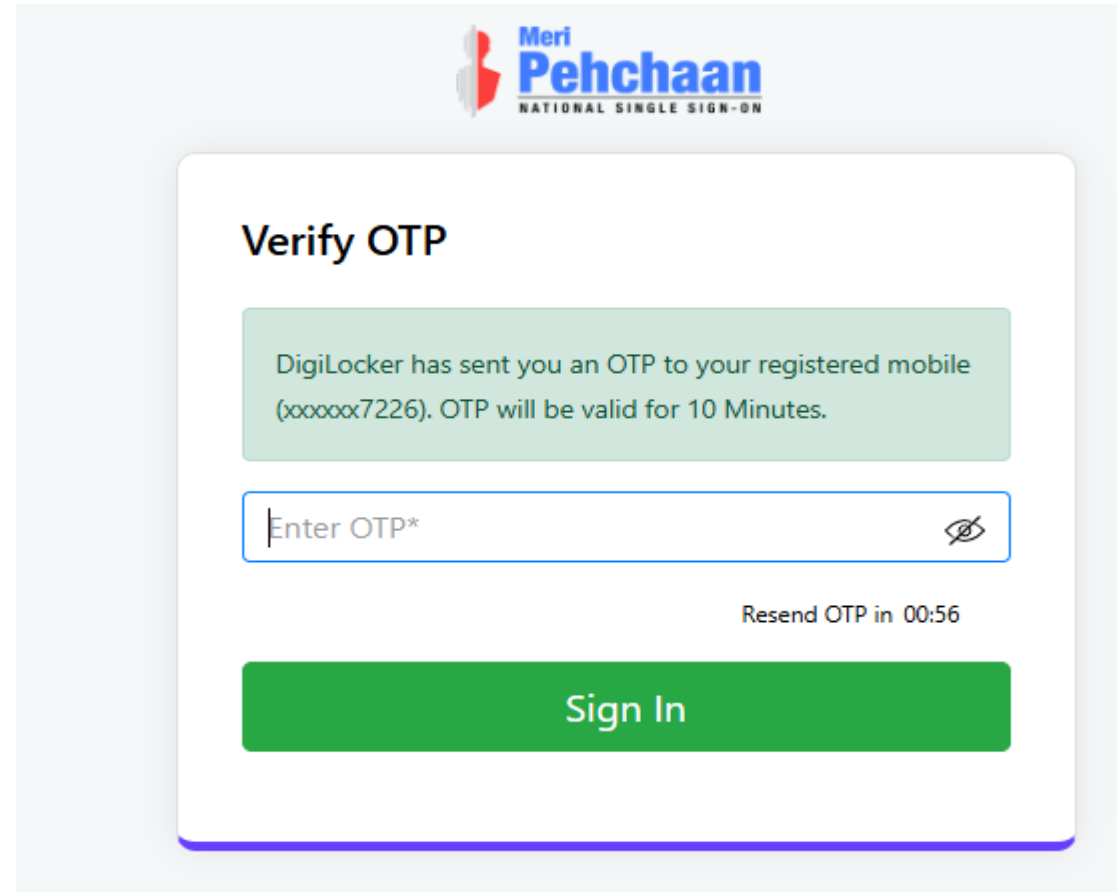
PIN less authentication

I consent to [terms of use](#).

**Sign In**

New user? [Sign up](#)

- Click on the "Others" tab and select the "Aadhaar" option from the dropdown. Enter the correct 12-digit Aadhaar number.
- To avoid entering the security PIN, check the box for "PIN-less authentication."
- Then, check the box to consent to the terms of use and click "Sign In."



**Meri Pehchaan**  
NATIONAL SINGLE SIGN-ON

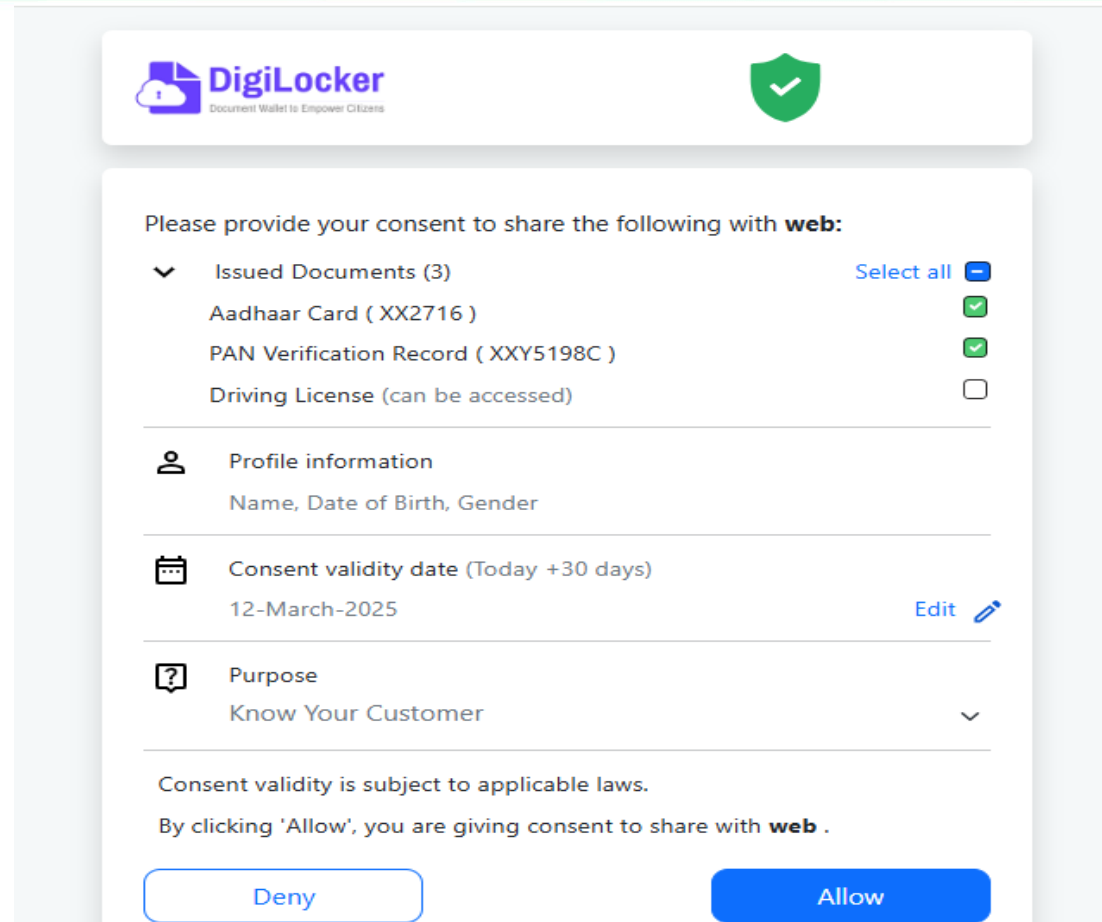
## Verify OTP

DigiLocker has sent you an OTP to your registered mobile (xxxxxx7226). OTP will be valid for 10 Minutes.

Resend OTP in 00:56

**Sign In**

- Client will receive 6-digit Digilocker OTP on their Aadhaar registered mobile number and Email ID.
- Enter the OTP and click on Sign In.



The screenshot shows the DigiLocker interface for document consent. At the top left is the DigiLocker logo with the tagline 'Document Wallet to Empower Citizens'. To the right is a green shield icon with a white checkmark. Below this is a section titled 'Please provide your consent to share the following with web:'. It contains a list of document categories with checkboxes for selection. The first category is 'Issued Documents (3)', which is expanded to show three items: 'Aadhaar Card ( XX2716 )', 'PAN Verification Record ( XXY5198C )', and 'Driving License (can be accessed)'. The first two items have green checkmarks, and the third has an empty checkbox. To the right of the 'Issued Documents' header is a 'Select all' link and a minus sign icon. Below the document list is a section for 'Profile information' with a person icon and the text 'Name, Date of Birth, Gender'. Next is a section for 'Consent validity date (Today +30 days)' with a calendar icon, the date '12-March-2025', and an 'Edit' link with a pencil icon. The final section is 'Purpose' with a question mark icon and the text 'Know Your Customer'. At the bottom, there is a disclaimer: 'Consent validity is subject to applicable laws. By clicking 'Allow', you are giving consent to share with web .' and two buttons: 'Deny' and 'Allow'.

**DigiLocker**  
Document Wallet to Empower Citizens

Please provide your consent to share the following with **web**:

- Issued Documents (3) [Select all](#)
- Aadhaar Card ( XX2716 )
- PAN Verification Record ( XXY5198C )
- Driving License (can be accessed)

**Profile information**  
Name, Date of Birth, Gender


**Consent validity date (Today +30 days)**  
12-March-2025 [Edit](#)

**Purpose**  
Know Your Customer

Consent validity is subject to applicable laws.  
By clicking 'Allow', you are giving consent to share with **web** .

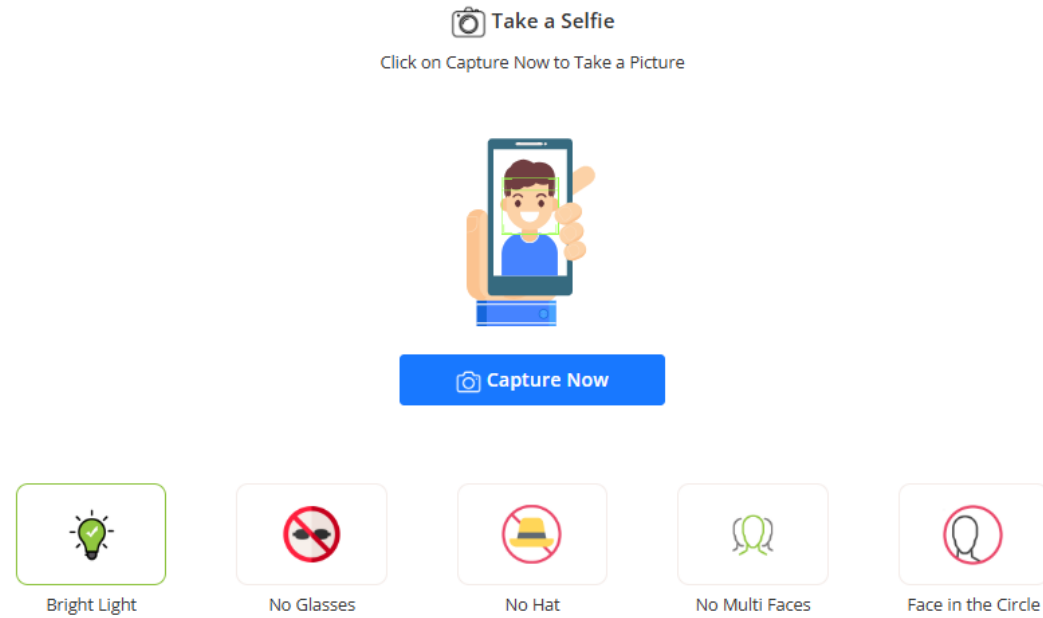
[Deny](#) [Allow](#)

- Here, client can check in the tick box to get the documents fetched from Digilocker.
- Always, click on Allow for successful Digilocker process.

Existing Address Details			
Address	Thane		
City	Thane	State	Maharashtra
Country	INDIA	Pincode	401209
DIGI Locker Address details (This will be taken on record)			
Address	Thane		
City	Thane	State	Maharashtra
Country	India	Pincode	401209
Signature Proof			

[Continue To Proceed Further](#)

- Address fetched from Digilocker will be displayed under Digilocker address details.
- Click on Continue to Proceed Further.



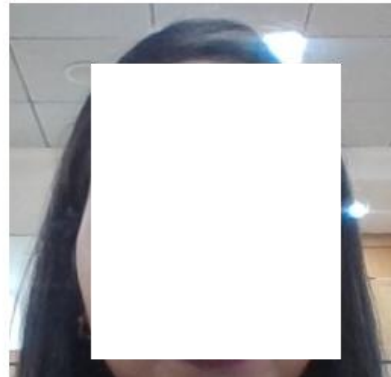
- Always allow access to Location and Camera.
- Check the etiquettes given on the screen.
- Keep the face in between the circle and click on Capture Now.

 Photo KYC Verification

Continue/E-sign

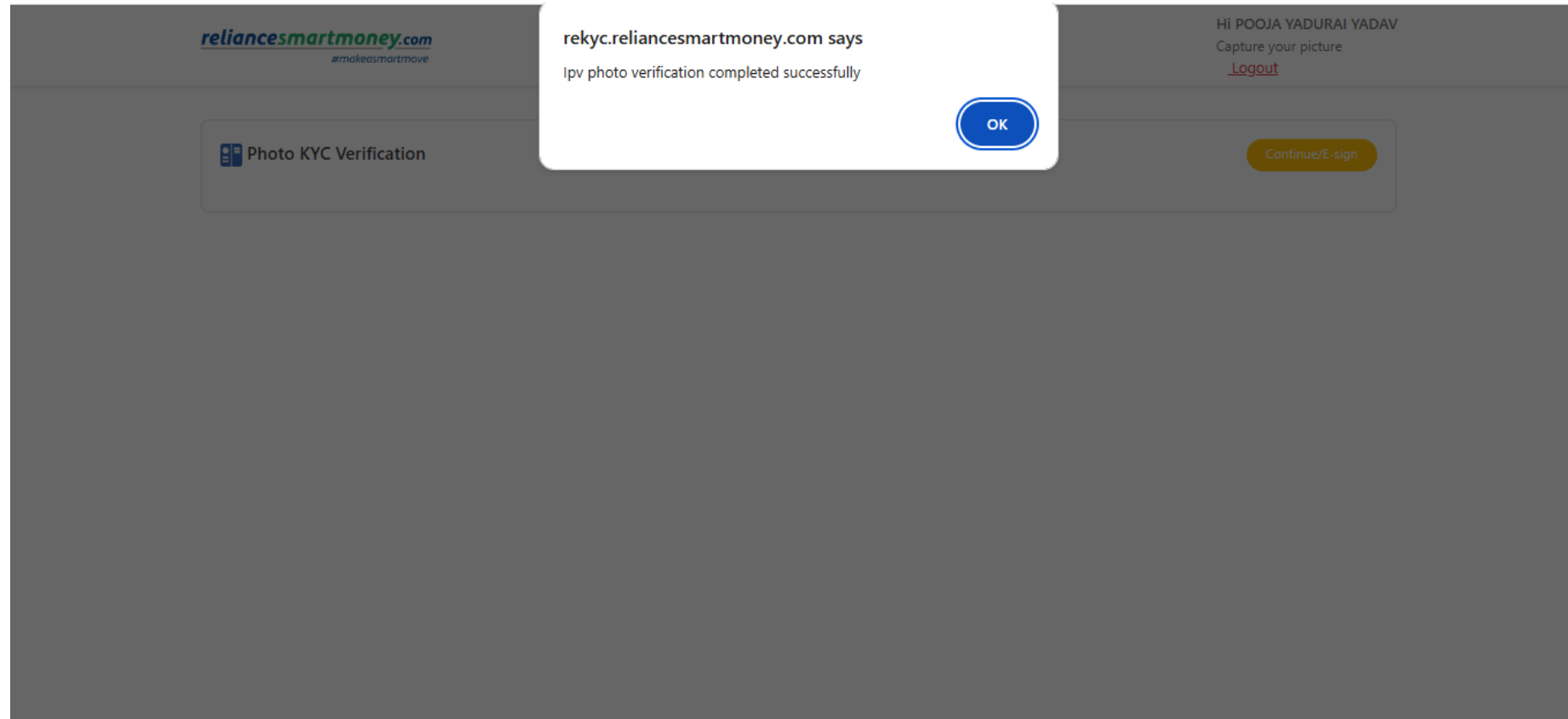
Now Check Captured Images and Submit, If you want to re capture the images click on "Re-Capture" button

Photo



- Click the appropriate selfie and upload the same.
- Once selfie is successfully uploaded click on continue Esign tab and proceed with the esign process.


# Address Modification-Selfie



Confirmation for IPV photo successfully verified will be displayed on the screen.

reliancesmartmoney.com  
#makeasmartmove

Hi  
View Edit and Digital sign  
[Logout](#)




You are just one step away from updating your details.

[eSign KYC Form](#)

I hereby give my consent to use my Aadhar/Virtual ID details (as applicable) for the purpose of e-signing my re-ekyc form

[Download PDF](#) [If you want to Edit](#)

- To download the Pre Esign pdf, click on Download PDF
- To make any changes- Click on If you want to Edit
- For Esign click on Esign KYC Form




**Reliance Securities Ltd. has requested to Digitally sign the document**  
Transaction ID: 96F0208CE0074F31B83E6840AE3FBE52 dated 2025-02-10T17:19:44



Select Lang ▼ Play audio Stop audio

Please click on the checkbox and enter Aadhaar/Virtual ID

I hereby authorize Protean eGov Technologies Limited (formerly NSDL e-Governance Infrastructure Limited) to -

1. Use my Aadhaar / Virtual ID details (as applicable) **eSigning of documents for Account opening** for/with **Reliance Securities Ltd.** and authenticate my identity through the Aadhaar Authentication system (Aadhaar based e-KYC services of UIDAI) in accordance with the provisions of the Aadhaar (Targeted Delivery of Financial and other Subsidies, Benefits and Services) Act, 2016 and the allied rules and regulations notified thereunder and for no other purpose.
2. Authenticate my Aadhaar / Virtual ID through OTP or Biometric for authenticating my identity through the Aadhaar Authentication system for obtaining my e-KYC through Aadhaar based e-KYC services of UIDAI and use my Photo and Demographic details (Name, Gender, Date of Birth and Address) **eSigning of documents for Account opening** for/with **Reliance Securities Ltd.** .
3. I understand that Security and confidentiality of personal identity data provided, for the purpose of Aadhaar based authentication is ensured by Protean eGov Technologies Limited and the data will be stored by Protean eGov Technologies Limited till such time as mentioned in guidelines from UIDAI from time to time.

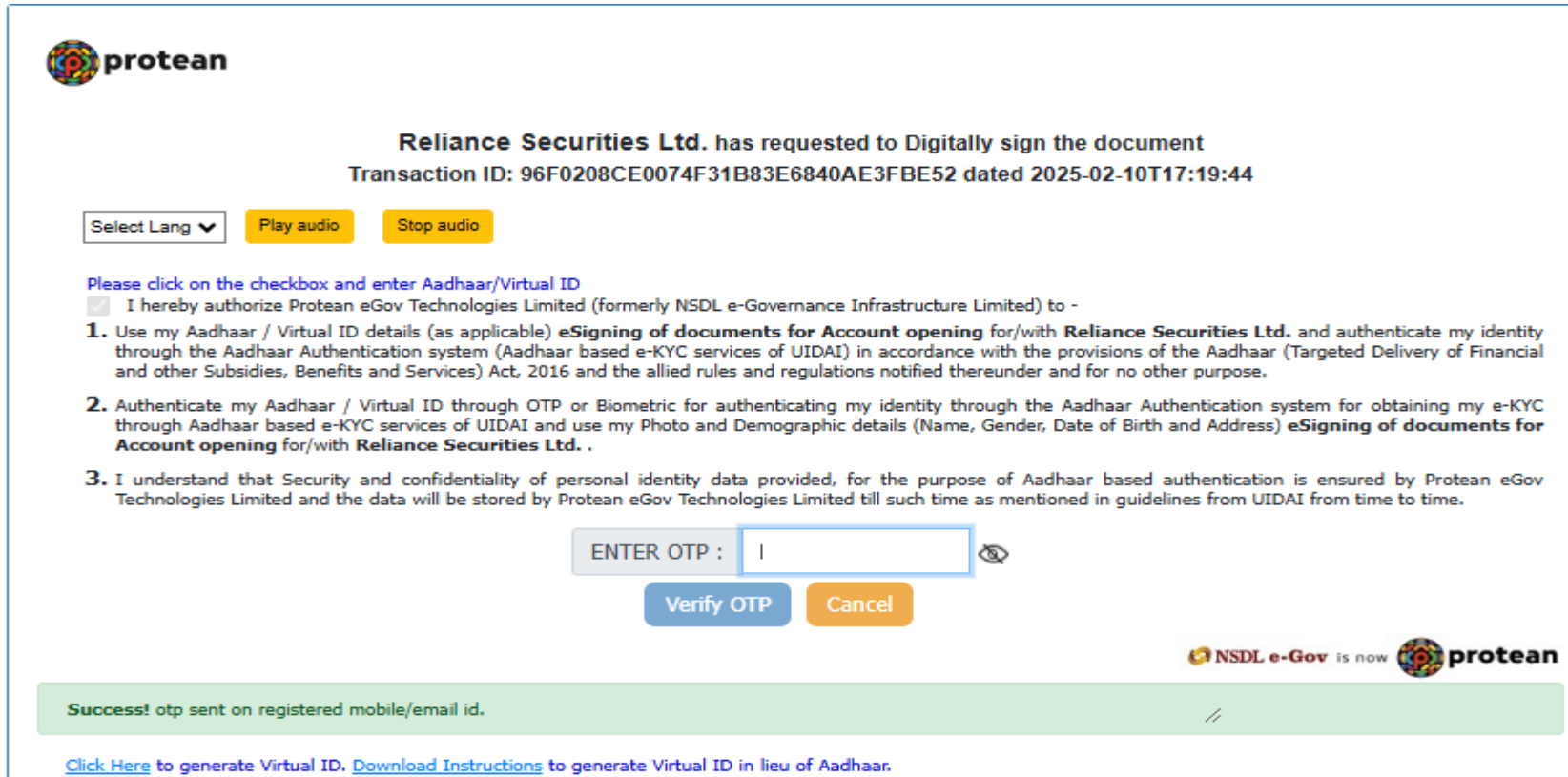
VID/Aadhaar:  


 NSDL e-Gov is now  protean

[Click Here](#) to generate Virtual ID. [Download Instructions](#) to generate Virtual ID in lieu of Aadhaar.

➤ Click in the check box, enter 12-digit, Aadhaar number

➤ Click on SEND OTP



 **protean**


**Reliance Securities Ltd. has requested to Digitally sign the document**  
Transaction ID: 96F0208CE0074F31B83E6840AE3FBE52 dated 2025-02-10T17:19:44

Select Lang ▼ Play audio Stop audio



Please click on the checkbox and enter Aadhaar/Virtual ID

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1. Use my Aadhaar / Virtual ID details (as applicable) **eSigning of documents for Account opening for/with Reliance Securities Ltd.** and authenticate my identity through the Aadhaar Authentication system (Aadhaar based e-KYC services of UIDAI) in accordance with the provisions of the Aadhaar (Targeted Delivery of Financial and other Subsidies, Benefits and Services) Act, 2016 and the allied rules and regulations notified thereunder and for no other purpose.
2. Authenticate my Aadhaar / Virtual ID through OTP or Biometric for authenticating my identity through the Aadhaar Authentication system for obtaining my e-KYC through Aadhaar based e-KYC services of UIDAI and use my Photo and Demographic details (Name, Gender, Date of Birth and Address) **eSigning of documents for Account opening for/with Reliance Securities Ltd.** .
3. I understand that Security and confidentiality of personal identity data provided, for the purpose of Aadhaar based authentication is ensured by Protean eGov Technologies Limited and the data will be stored by Protean eGov Technologies Limited till such time as mentioned in guidelines from UIDAI from time to time.

ENTER OTP :  

Verify OTP Cancel

 NSDL e-Gov is now  **protean**

Success! otp sent on registered mobile/email id.

[Click Here](#) to generate Virtual ID. [Download Instructions](#) to generate Virtual ID in lieu of Aadhaar.

- Client will receive 6-digit, OTP on their Aadhaar registered Mobile number & Email ID
- Enter OTP and click on Verify OTP



Your request for Re-Ekyc has been received by us.  
Our team will review this application and revert within 24 Hrs.

- **Once Esign is completed for Address Modification, request will get submitted successfully.**

## What do you want update?



Profile

You can update Profile details



Income

You can update Income details



Contact Info

You can update Mobile or Email ID



Address

You can update your address



Bank

You can add/update bank details



Trading Segment


You can update trading segments



Nominee Details

You can update nominee details



 Bank Modification


Continue/E-sign

Existing Bank Details

Account Number	IFSC Code	MICR	Bank name	IsDefault
001091800044633	YESB0000010	400532004	YES BANK	YES


+Modify






- Existing bank details will be displayed on the screen.
- To update new Bank details, click on Modify

 Bank Modification [Continue/E-sign](#)


**Choose your Bank**

Reliance Smart Money, protects your financial information with Bank Grade Security




-  State Bank of India
-  Punjab National Bank
-  Canara Bank
-  Union Bank of India
-  Bank of Baroda

➤ Enter Bank name or search bank of which client wants to add details and select the same


 Bank Modification [Continue/E-sign](#)

**Choose your Bank**  
Reliance Smart Money, protects your financial information with Bank Grade Security




Or

➤ Enter Bank Details- IFSC Code or Search your branch by typing your branch name

 Bank Modification Continue/E-sign

**Verify your bank account**  
Investments on Reliance Smart Money, can be done using only saving bank accounts

 Yes Bank [Edit](#)

Branch Name	ANDHERI(W), MUMBAI
IFSC Code	YES80000010
Address	G1, GROUND FLOOR, VALECHA CHAMBERS, PLOT B6, NEW LINK ROAD,, ANDHERI (WEST), MUMBAI, MAHARASHTRA-400053

Enter Bank Account Number \*

Primary Bank \*

**VERIFY BANK ACCOUNT**

- Penny Drop- Enter Account number, select primary bank option Yes/No and click on Verify Bank Account.
- If Penny drop fails-Manual- Upload bank proof- Personalized Cheque (Format- Jpg, Jpeg, Pdf. Size- 3 MB)
- Once Bank proof uploaded click on Verify Bank Account

The screenshot shows a web interface for modifying bank details. A modal dialog titled "Confirm Bank Account Number" is open, displaying "Entered account number: 0010" and two buttons: "Yes" (green) and "No" (yellow). The background form is dimmed and shows the following information:

Branch Name	ANDHERI(W), MUMBAI
IFSC Code	YES60000010
Address	G1, GROUND FLOOR, VALECHA CHAMBERS, PLOT 86, NEW LINK ROAD, ANDHERI (WEST), MUMBAI, MAHARASHTRA-400053

Below the table, there is a form with the following fields:

- Enter Bank Account Number \* (Input: 00)
- Primary Bank \* (Input: Yes)

At the bottom, there is a section for uploading a cancelled cheque:

Upload scan copy of the cancelled cheque where your Name, Bank account number, IFSC and MICR number are clearly visible (personalised cheque) \*

Note : Allowed document types are JPG, JPEG, PDF. File must be less than 3 MB in size.


Uploaded cheque verified successfully

At the bottom of the form, there is a "VERIFY BANK ACCOUNT" button.

- Confirm Bank account number and click on Yes if updated bank detail and uploaded bank proof matches.

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Hi  
View Edit and Digital sign  
[Logout](#)




You are just one step away from updating your details.

[eSign KYC Form](#)

I hereby give my consent to use my Aadhar/Virtual ID details (as applicable) for the purpose of e-signing my re-ekyc form

[Download PDF](#) [If you want to Edit](#)

- To download the Pre Esign pdf, click on Download PDF
- To make any changes- Click on If you want to Edit
- For Esign click on Esign KYC Form




**Reliance Securities Ltd. has requested to Digitally sign the document**  
Transaction ID: 96F0208CE0074F31B83E6840AE3FBE52 dated 2025-02-10T17:19:44

Select Lang ▼ Play audio Stop audio



Please click on the checkbox and enter Aadhaar/Virtual ID

I hereby authorize Protean eGov Technologies Limited (formerly NSDL e-Governance Infrastructure Limited) to -

1. Use my Aadhaar / Virtual ID details (as applicable) **eSigning of documents for Account opening for/with Reliance Securities Ltd.** and authenticate my identity through the Aadhaar Authentication system (Aadhaar based e-KYC services of UIDAI) in accordance with the provisions of the Aadhaar (Targeted Delivery of Financial and other Subsidies, Benefits and Services) Act, 2016 and the allied rules and regulations notified thereunder and for no other purpose.
2. Authenticate my Aadhaar / Virtual ID through OTP or Biometric for authenticating my identity through the Aadhaar Authentication system for obtaining my e-KYC through Aadhaar based e-KYC services of UIDAI and use my Photo and Demographic details (Name, Gender, Date of Birth and Address) **eSigning of documents for Account opening for/with Reliance Securities Ltd.** .
3. I understand that Security and confidentiality of personal identity data provided, for the purpose of Aadhaar based authentication is ensured by Protean eGov Technologies Limited and the data will be stored by Protean eGov Technologies Limited till such time as mentioned in guidelines from UIDAI from time to time.

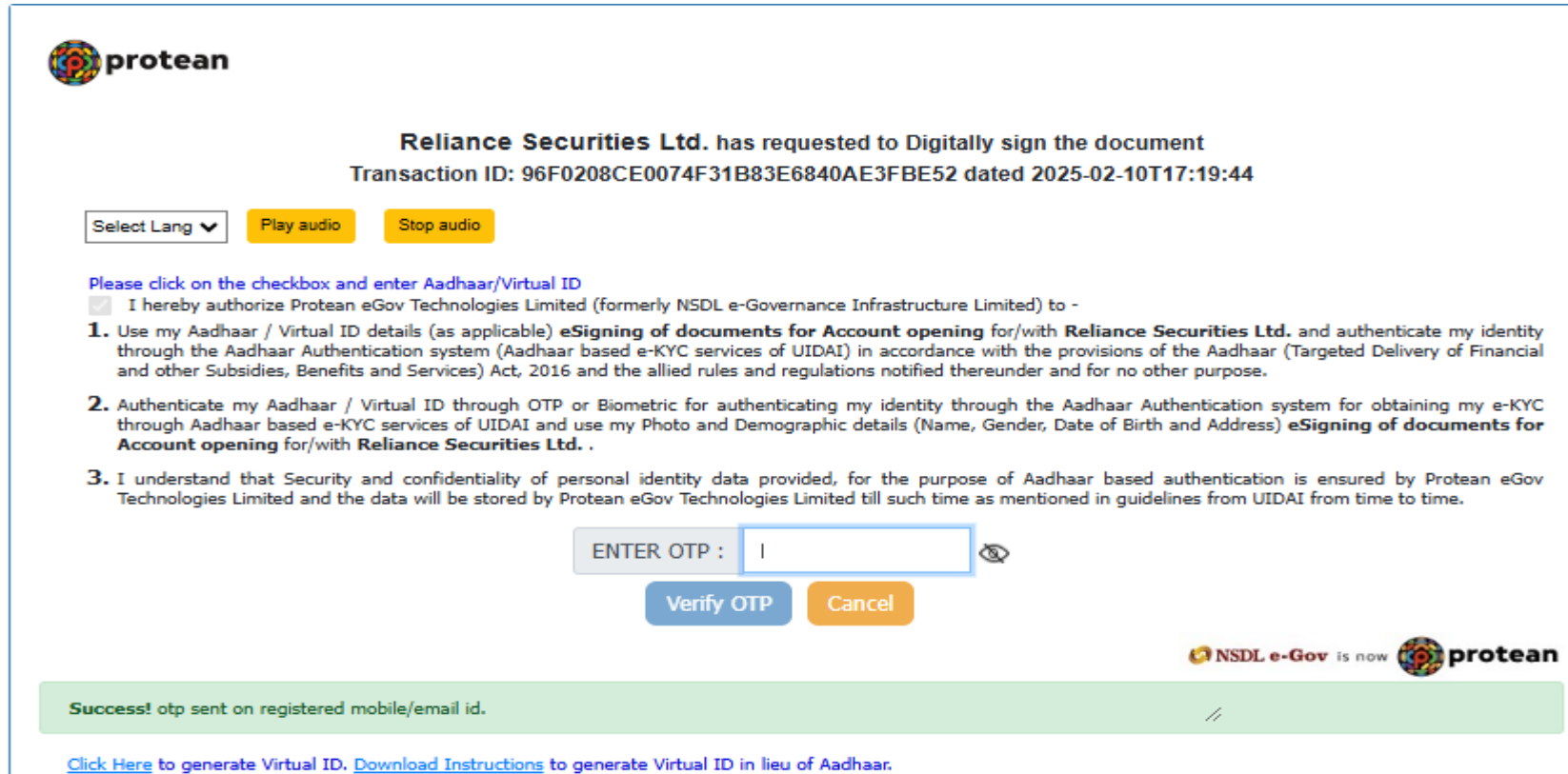
VID/Aadhaar:  


**SEND OTP** **CANCEL**

 NSDL e-Gov is now 

[Click Here to generate Virtual ID.](#) [Download Instructions](#) to generate Virtual ID in lieu of Aadhaar.

- Click in the check box, enter 12-digit, Aadhaar number
- Click on SEND OTP



 **protean**


**Reliance Securities Ltd. has requested to Digitally sign the document**  
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Select Lang ▼ Play audio Stop audio



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ENTER OTP :  

Verify OTP Cancel

 NSDL e-Gov is now  **protean**

Success! otp sent on registered mobile/email id.

[Click Here](#) to generate Virtual ID. [Download Instructions](#) to generate Virtual ID in lieu of Aadhaar.

- Client will receive 6-digit, OTP on their Aadhaar registered Mobile number & Email ID
- Enter OTP and click on Verify OTP



Your request for Re-Ekyc has been received by us.  
Our team will review this application and revert within 24 Hrs.

- **Once Esign is completed for Bank Modification, request will get submitted successfully.**

## What do you want update?



### Profile

You can update Profile details



### Income

You can update Income details



### Contact Info

You can update Mobile or Email ID



### Address

You can update your address



### Bank

You can add/update bank details



### Trading Segment


You can update trading segments



### Nominee Details

You can update nominee details



 Segment Modification Continue/E-sign

**You are enabled in the following segment:**

- Equity - NSE CASH, BSE CASH
- Currency Derivative - NSE Currency, BSE Currency
- Equity Derivative - NSE Fno, BSE Fno
- Mutual Funds - NSE MF, BSE MF
- SLB - NSE SLB

**Pending segment for activation:**

Select Valid Document

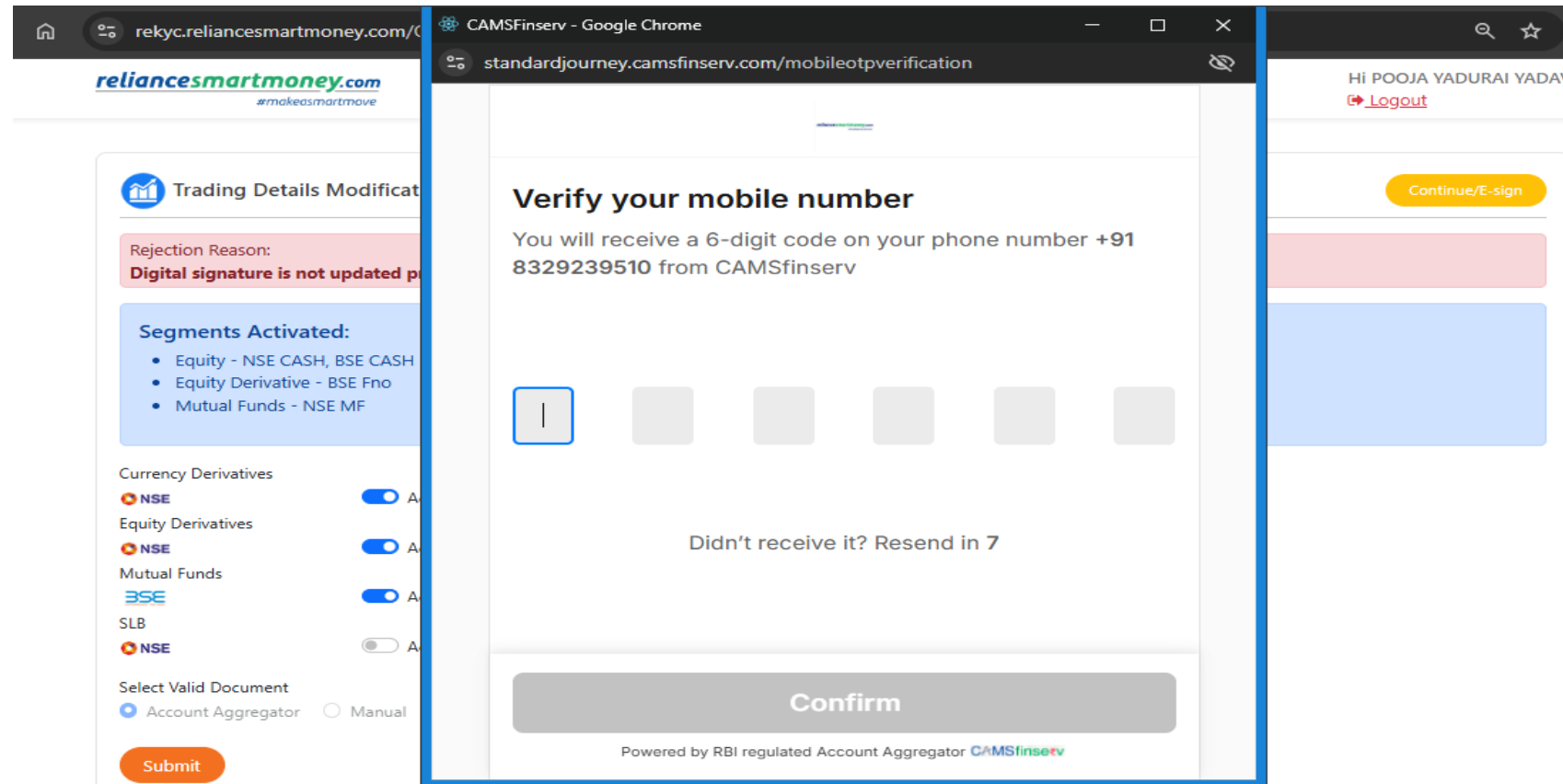
Account Aggregator  Manual

---

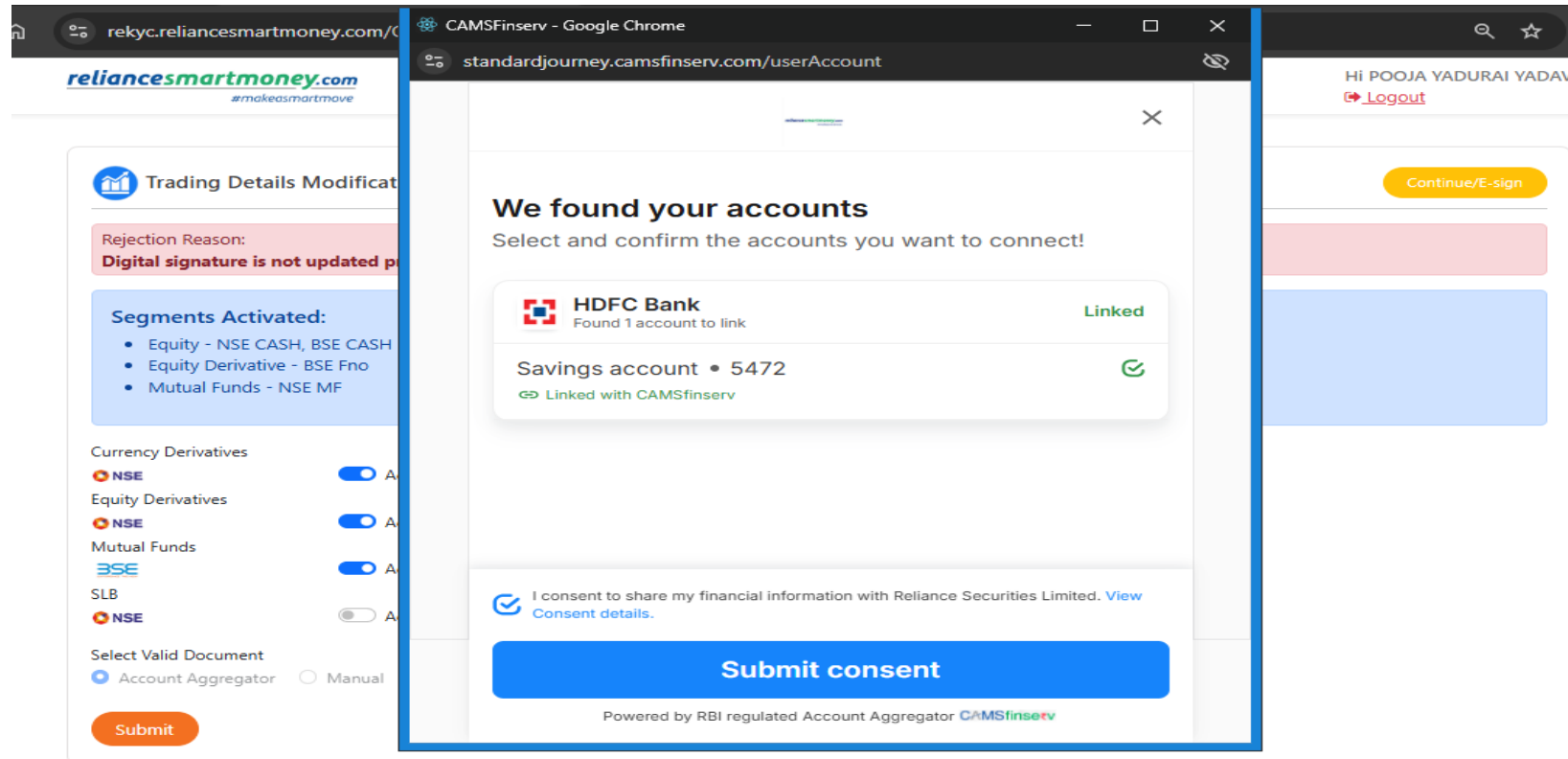
**Note:**

- Currently, the following segments are not allowed to be enabled in online mode:
- NSE Currency, BSE Currency
- MCX Commodities, NCDEX Commodities

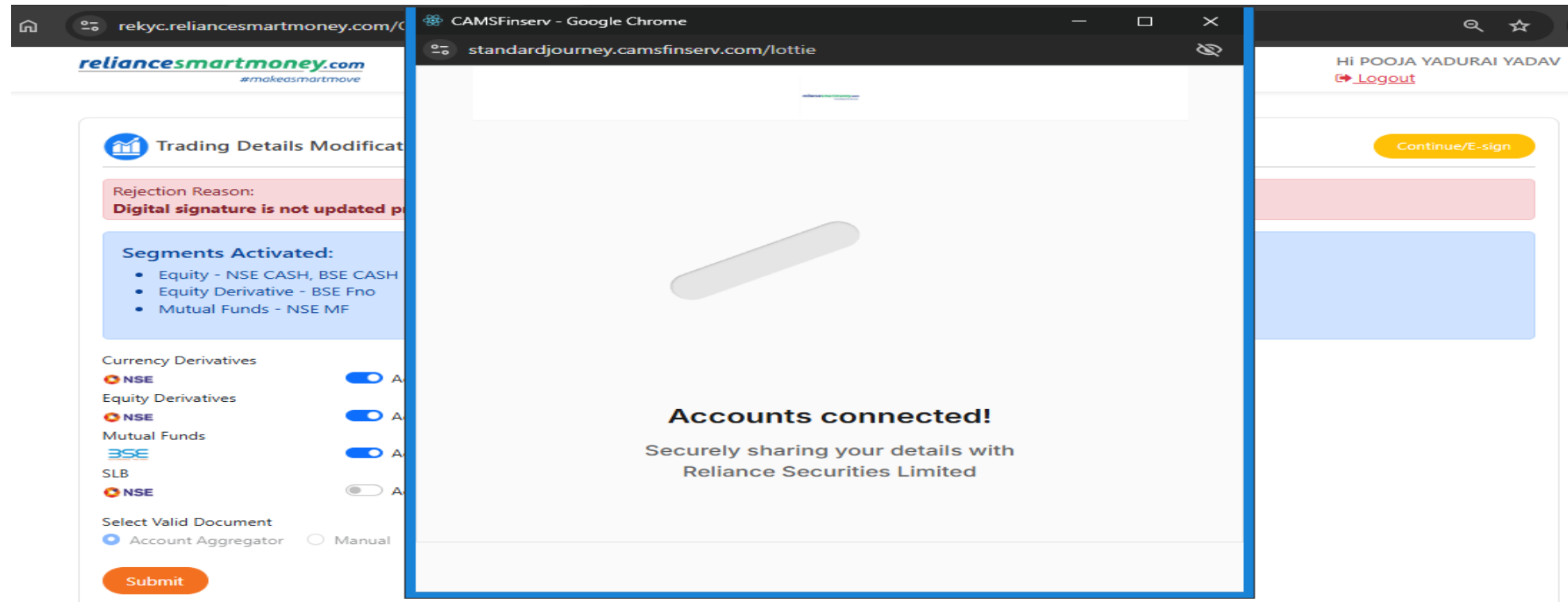
- To activate the segment clients had to provide a valid document.
- To fetch the 6 Months bank statement online, click on Account Aggregator.



- The Client will receive 6-Digit OTP from CAMSfinserv on the Mobile number which is registered with Reliance.
- Enter the OTP and click on Confirm.



- The Bank which is registered with Reliance will appear on the screen.
- To Fetch 6 Months Bank statement online, tick in the consent box and click on Submit consent.



- Here Camsfinserv Account aggregator is successfully connects with bank account.
- Display Message on the screen that Camsfinserv is sharing details with Reliance Securities Limited.

The screenshot shows a web browser window displaying the Reliance Smart Money website. The main content area is a light blue box with the following text:

**Add an income proof to Activate F&O trading**

As per regulatory requirements, please provide your income proof for F&O segment activation

**Verifying Bank Statement**

We are verifying your bank statement details.  
This may take up to 60 sec.  
Please do not leave this page or go back.

Redirecting in 15 seconds...

At the bottom of the blue box, it says: Copyright © reliancesmartmoney.com. +91-22-41681200 rsec.infosec@relianceada.com

On the left side of the page, there is a 'Trading Details Modification' section. It shows a 'Rejection Reason: Digital signature is not updated p'. Below this, it lists 'Segments Activated:' with a bulleted list: Equity - NSE CASH, BSE CASH; Equity Derivative - BSE Fno; Mutual Funds - NSE MF. There are also sections for 'Currency Derivatives', 'Equity Derivatives', 'Mutual Funds', 'SLB', and 'Select Valid Document' with radio buttons for 'Account Aggregator' and 'Manual'. A 'Submit' button is at the bottom of this section.

On the right side of the page, there is a user profile section with the name 'Hi POOJA YADURAI YADAV' and a 'Logout' link. Below this is a yellow 'Continue/E-sign' button.


➤ Message displays on the screen that an income proof is fetched to activate F&O segment.

# Trading Segment- Account Aggregator

**Segments Activated:**

- Equity - NSE CASH, BSE CASH
- Equity Derivative - BSE Fno
- Mutual Funds - NSE MF


Currency Derivatives

NSE  Active   Active

Equity Derivatives

NSE  Active

Mutual Funds

  Active

SLB

NSE  Active

Select Valid Document

Account Aggregator  Manual

Select Valid Document

Bank Statement (FROM SETU AA) ▼

Proof uploaded successfully

➤ Once the bank statement is successfully fetched and auto uploaded, click on Submit.

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Hi  
[Logout](#)

Segment Modification Continue/E-sign

You are enabled in the following segment:

- Equity - NSE CASH, BSE CASH
- Currency Derivative - NSE Currency, BSE Currency
- Equity Derivative - NSE Fno, BSE Fno
- Mutual Funds - NSE MF, BSE MF
- SLB - NSE SLB

Pending segment for activation:

Select Valid Document  
 Account Aggregator  Manual

Select Valid Document  
Bank Statement (FROM SETU AA) ▼

Upload Proof \*  
Choose File No file chosen

**Note:**  
- Currently, the following segments are not allowed to be enabled in online mode:  
- NSE Currency, BSE Currency  
- MCX Commodities, NCDEX Commodities

Submit

➤ To upload the document manually to activate the segment click on the Manual tab.

My profile Trading Details - Reliance  
rekyc.reliancesmartmoney.com/Client/TradingDetails

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Hi POOJA YADURAI YADAV  
[Logout](#)

Trading Details Modification [Continue/E-sign](#)

Rejection Reason:  
**Digital signature is not updated properly**

Segments Activated:

- Equity - NSE CASH, BSE CASH
- Equity Derivative - BSE Fno
- Mutual Funds - NSE MF

Currency Derivatives

NSE  Active  BSE  Active

Equity Derivatives

NSE  Active

Bank Statement (Last 6 months)  
Bank Passbook (Last 6 months)  
Form 16 (Last Year)  
Net-worth Certificate (Latest)  
DP Holding Statement (Latest)  
IT Return (Last Year)  
**Salary Slip (Last Month)**  
Salary Slip (Last Month)

Upload Proof \*


No file chosen

16:08  
16-06-2025

- Select a valid document from the list.
- In an upload proof option click on choose file and upload a valid document.
- After uploading the document click on Submit.
- And click on Continue Esign Tab if client want to complete only segment activation.

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#makeasmartmove

Hi  
View Edit and Digital sign  
[Logout](#)




You are just one step away from updating your details.

[eSign KYC Form](#)

I hereby give my consent to use my Aadhar/Virtual ID details (as applicable) for the purpose of e-signing my re-ekyc form

[Download PDF](#) [If you want to Edit](#)

- To download the Pre Esign pdf, click on Download PDF
- To make any changes- Click on If you want to Edit
- For Esign click on Esign KYC Form




**Reliance Securities Ltd. has requested to Digitally sign the document**  
Transaction ID: 96F0208CE0074F31B83E6840AE3FBE52 dated 2025-02-10T17:19:44

Select Lang ▼ Play audio Stop audio



Please click on the checkbox and enter Aadhaar/Virtual ID

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VID/Aadhaar:  

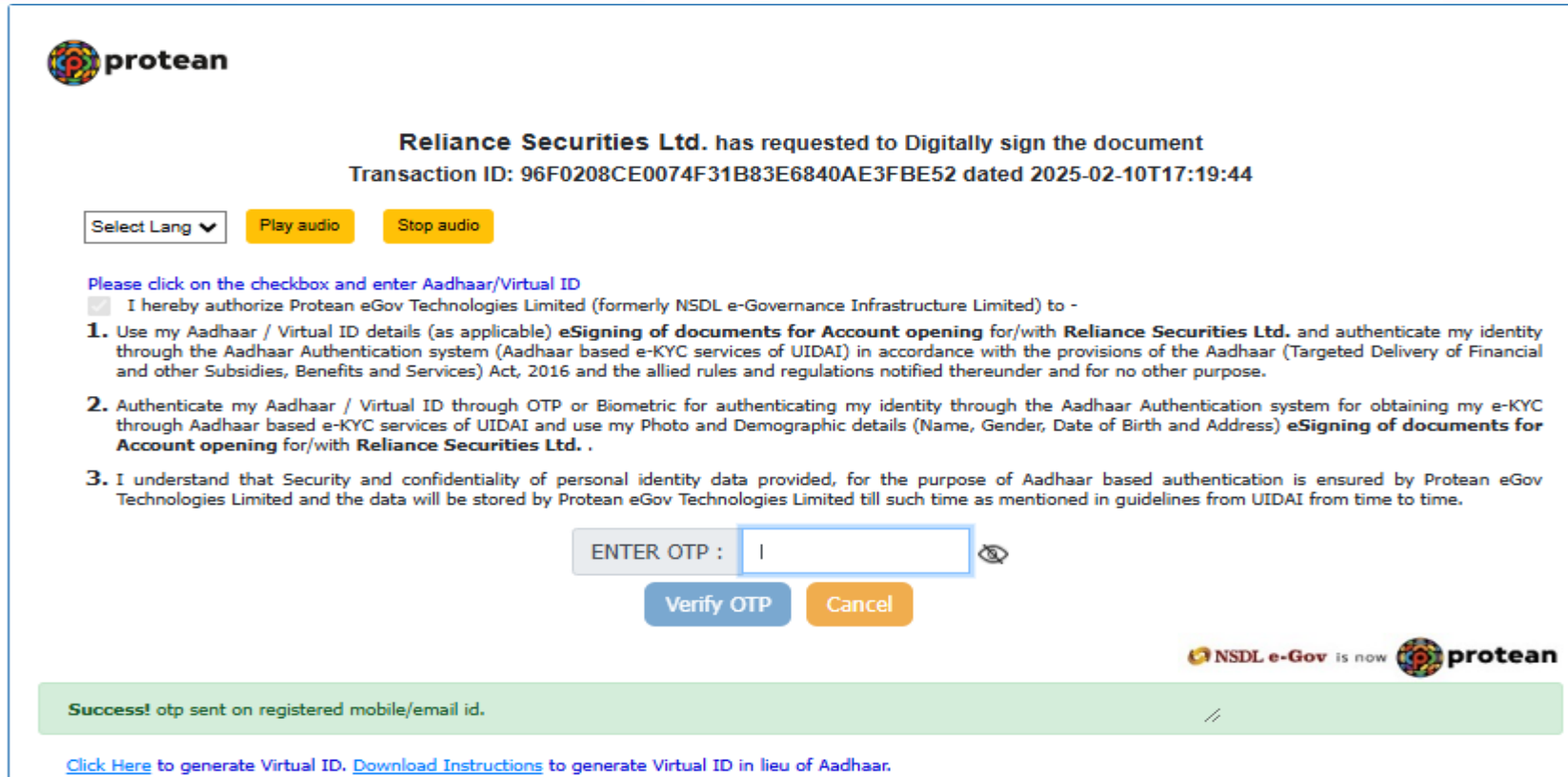
**SEND OTP** **CANCEL**


 NSDL e-Gov is now  **protean**

[Click Here to generate Virtual ID.](#) [Download Instructions](#) to generate Virtual ID in lieu of Aadhaar.

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- Click in the check box, enter 12-digit, Aadhaar number
- Click on SEND OTP



 **protean**


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ENTER OTP :  

Verify OTP Cancel

 NSDL e-Gov is now  **protean**

Success! otp sent on registered mobile/email id.

[Click Here](#) to generate Virtual ID. [Download Instructions](#) to generate Virtual ID in lieu of Aadhaar.

- Client will receive 6-digit, OTP on their Aadhaar registered Mobile number & Email ID
- Enter OTP and click on Verify OTP



Your request for Re-Ekyc has been received by us.  
Our team will review this application and revert within 24 Hrs.

- Once Esign is completed for Trading Segment, request will get submitted successfully.

## What do you want update?



### Profile

You can update Profile details



### Income

You can update Income details



### Contact Info

You can update Mobile or Email ID



### Address

You can update your address



### Bank

You can add/update bank details



### Trading Segment


You can update trading segments



### Nominee Details

You can update nominee details



 Nominee Details Continue/E-sign


Existing Nominee Details

Nominee Name 1	Fareed Sarang	Nominee Percentage 1	50%
Nominee Name 2		Nominee Percentage 2	50%

Would you like to modify your nominee details ?

- Existing Nominee Details will display on screen.
- If client want to Modify existing nominee details, click on Would you like to modify your nominee details?

# Nominee Details

 Nominee Details Continue/E-sign

Existing Nominee Details

Nominee Name 1	Fareed Sarang	Nominee Percentage 1	50%
Nominee Name 2		Nominee Percentage 2	50%

Yes - I/We wish to nomination No - I/We do not wish to opt for nomination

- If client want to add Nominee Click on – Yes- I/We wish to Nomination
- If client do not wish to add nominee Click on- No- I/We do not wish to opt for nomination

The screenshot shows the 'Nominee Details' form on the Reliance Smart Money website. The form is divided into two columns for 'Nominee 1' and 'Nominee 2'. Each column contains the following fields:

- Nominee name \***: Text input field.
- Nominee Gender**: Select dropdown menu.
- Nominee Proof Type \***: Select dropdown menu.
- Nominee Proof No. \***: Text input field.
- Date of Birth**: Date picker (DD, MM, YYYY).
- Relationship \***: Select dropdown menu.
- Address \***: Text area with a 'Click here, in case you want to modify the address' link.
- Nominee Mobile \***: Text input field.
- Nominee Email ID \***: Text input field.
- Nomination share (50%) \***: Slider control.

At the bottom of the form, there is a 'Save Nominee Details' button. A 'Modify your nominee details' link is visible at the top right of the form area.

- Client's can add up to 3 Nominee
- Enter Full Nominee Name, Gender, Nominee Proof type- Pan/UID
- Nominee proof no.- For UID only last 4-digit to enter
- DOB, Relationship, Address, Nominee Contact details and % of share

# Nominee Details-Minor

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Hi  
Modify your nominee details  
[Logout](#)

One

**Nominee 1**

**Nominee name \***  
VIHAAN YADAV

**Nominee Gender**  
Male

**Nominee Proof Type \***  
UID NO.

**Nominee Proof No. \***  
7585

Please Enter Last 4 Digits of UID NO

**Date of Birth (If nominee is minor, Please enter DOB)**  
dd mm yyyy

**Relationship \***  
Sister

**Address \***  
C/101, Deep Angan CHS LTD Near Divine Providence School Tulj Road  
Ambawadi Nallasopara (East) Thane Thane Maharashtra-401209 INDIA

[Click here, incase you want to modify the address](#)

**Nominee Mobile \***  
Enter Nominee Mobile

**Nominee Email ID\***  
Enter Nominee Email

**Nomination share (100%) \***

Save Nominee Details

➤ Once all the Nominee details are update, click on Save Nominee details.

**Nominee 1 Guardian Details**

Date of birth (Guardian)

Name of the guardian

Guardian Proof Type

Guardian Proof No.

Guardian Gender

Guardian Address Line 1

Guardian Address Line 2

Guardian Address Line 3

Pin code

State

City

Country

Relationship with guardian

Guardian email id

Guardian mobile

- If Nominee is Minor- Details of guardian need to be entered.
- DOB, Proof type, Proof No., Address, Gender, Relationship with guardian.
- Contact details of Guardian is not mandatory.

# Nominee Details-If nominee want to change the address

The screenshot displays the 'Nominee 1 Address Modification' dialog box on the Reliance Smart Money website. The dialog box is centered and contains the following fields:

- Address 1: ENTER ADDRESS
- Address 2: ENTER ADDRESS
- Address 3: ENTER ADDRESS
- Pin code: 401209
- State: MAHARASHTRA
- City: THANE
- Country: INDIA

At the bottom of the dialog box, there are two buttons: 'Submit' (orange) and 'Close' (red). The background shows the main nominee details form with fields for Nominee Proof No., Date of Birth, Relationship, Address, Nominee Mobile, Nominee Email ID, and Nomination share (50%).

- If nominee want to change address, click on- Click to modify address.
- Enter the address in Address line 1, 2, & 3 and click on Submit.

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Hi  
View Edit and Digital sign  
[Logout](#)


You are just one step away from updating your details.

[eSign KYC Form](#)

I hereby give my consent to use my Aadhar/Virtual ID details (as applicable) for the purpose of e-signing my re-ekyc form

[Download PDF](#) [If you want to Edit](#)

- To download the Pre Esign pdf, click on Download PDF
- To make any changes- Click on If you want to Edit
- For Esign click on Esign KYC Form




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Select Lang ▼ Play audio Stop audio



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VID/Aadhaar:  

SEND OTP CANCEL

 NSDL e-Gov is now  protean

[Click Here to generate Virtual ID.](#) [Download Instructions](#) to generate Virtual ID in lieu of Aadhaar.

- Click in the check box, enter 12-digit, Aadhaar number
- Click on SEND OTP




**Reliance Securities Ltd.** has requested to Digitally sign the document  
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ENTER OTP :  

Verify OTP Cancel

 NSDL e-Gov is now  protean

Success! otp sent on registered mobile/email id.

[Click Here](#) to generate Virtual ID. [Download Instructions](#) to generate Virtual ID in lieu of Aadhaar.

➤ Client will receive 6-digit, OTP on their Aadhaar registered Mobile number & Email ID

➤ Enter OTP and click on Verify OTP



Your request for Re-Ekyc has been received by us.  
Our team will review this application and revert within 24 Hrs.

- Once Esign is completed for Nominee Updation, request will get submitted successfully.

The End

---

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#makeasmartmove

Thank You

