

Step-by-Step Process to Close Your Demat & Trading Account

◆ For Web Users:

- 1. Login to Website**
Go to the home page of your broker's website.
- 2. Navigate to Close KYC**
Click on **Menu** → **Quick Links** → **Close KYC**.
- 3. Enter Details**
Fill in your:
 - UCC (Unique Client Code)
 - Date of Birth (DOB)
- 4. Verify Your Identity**
You'll receive OTPs on your registered:
 - Mobile number
 - Email IDEnter both OTPs to proceed.
- 5. Upload Documents**
Upload the following:
 - Client Master Report (in PDF format)
 - Delivery Instruction Slip (DIS), duly signed
 - Clear image of your signature (matching KYC)
- 6. Select Exchanges**
Choose the relevant exchanges (e.g., NSE, BSE) where your account is active.
- 7. Transfer Your Holdings**
Ensure you transfer all shares, mutual funds, and other holdings to another demat account.
- 8. Clear Balances**
Make sure your trading account has **no remaining balance or dues** (funds or margin).
- 9. Submit Closure Request**
Once all details and documents are submitted, confirm and finalize the request.
- 10. Closure Timeline**
The account will be reviewed and closed typically within **7-10 working days**.

◆ For Mobile App Users:

- 1. Open the App**
Login to your broker's official mobile application.
- 2. Go to Profile**
Tap the **side menu** or **profile icon**, then scroll to the bottom.
- 3. Click on "Close Account"**
This will lead you to the same closure process as the web version.
- 4. Follow Steps 3 to 10 from Web Section**
The process continues exactly as outlined above (UCC, verification, upload, transfer, etc.).

Important Notes:

- Make sure **all stocks are transferred** before submission.
- Ensure **no negative balance** or **pending debit** remains.
- Use **clear scanned PDFs** for all uploads.