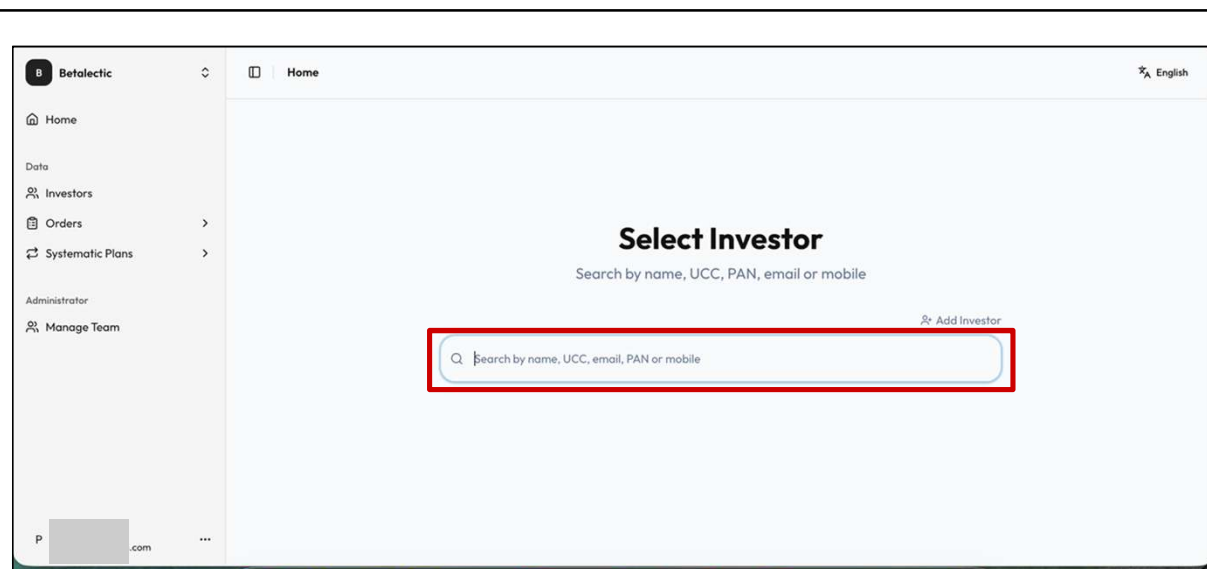




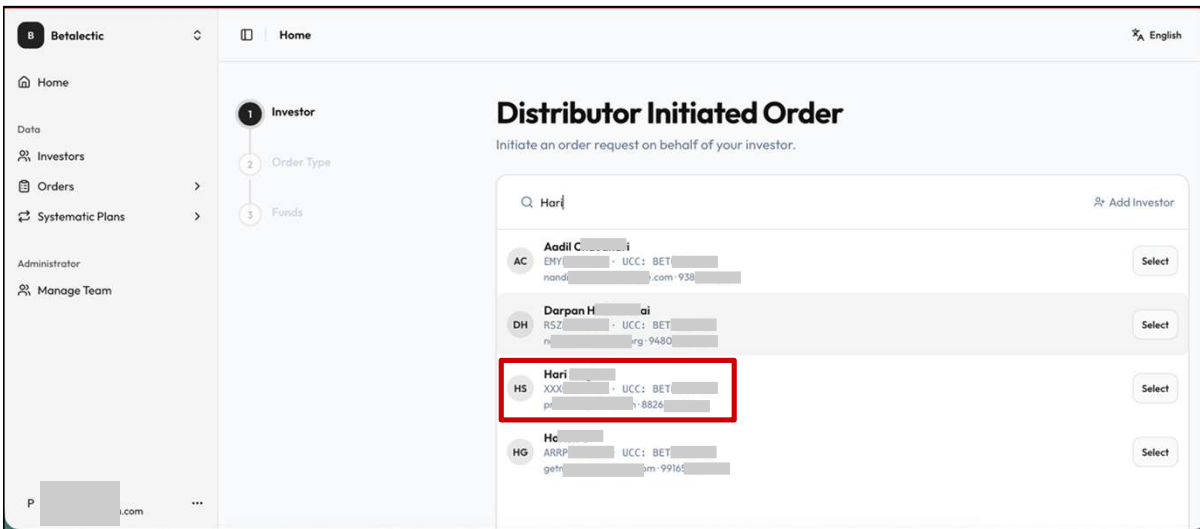
## NCDEX Nidhi

### User Manual - SIP (English)



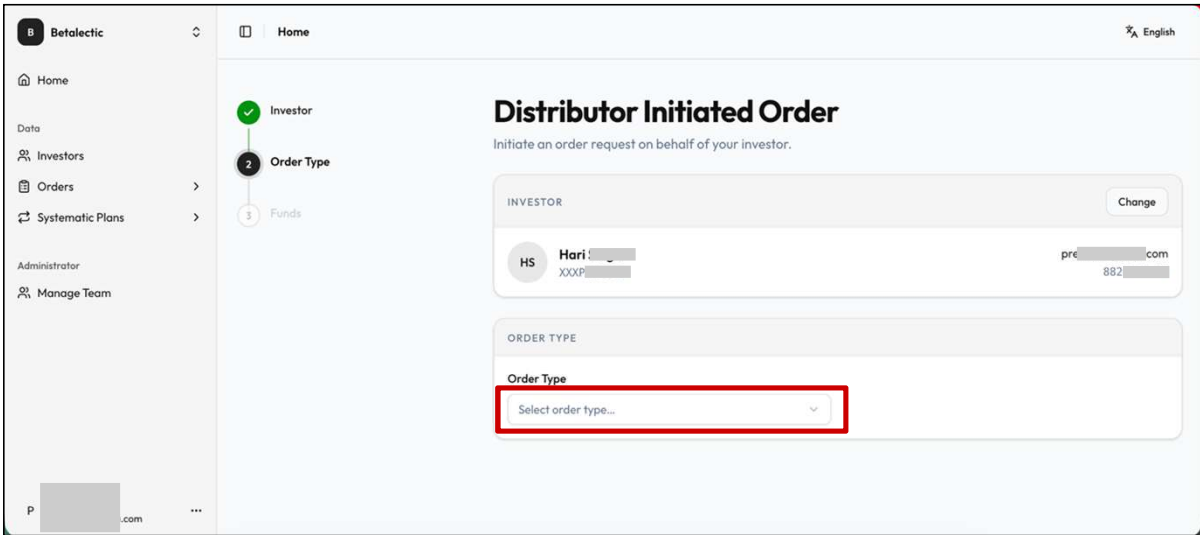
On the home screen, start typing the name/UCC/email/PAN/mobile number of the investor you want to place an order for.





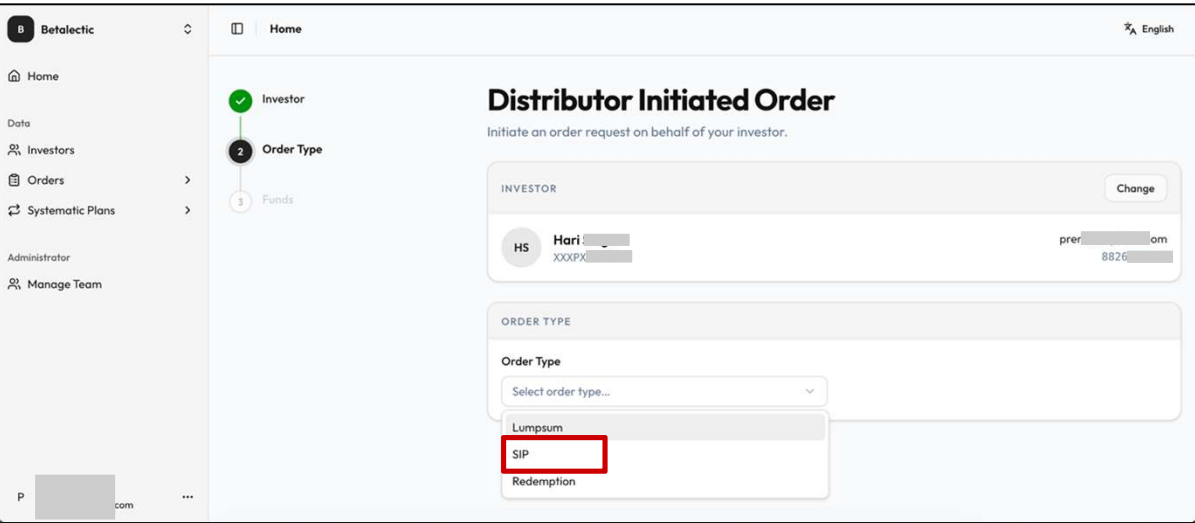
As the investor details start appearing, choose the investor you want to place the transaction for.





After selecting the investor, you will be asked to select order type.





**Betalectic** Home English

Home

Data

Investors

Orders

Systematic Plans

Administrator

Manage Team

P [redacted].com

**Distributor Initiated Order**  
Initiate an order request on behalf of your investor.

INVESTOR Change

HS Hari [redacted] XXXPX [redacted] pre [redacted]@om 8826 [redacted]

ORDER TYPE

Order Type

Select order type...

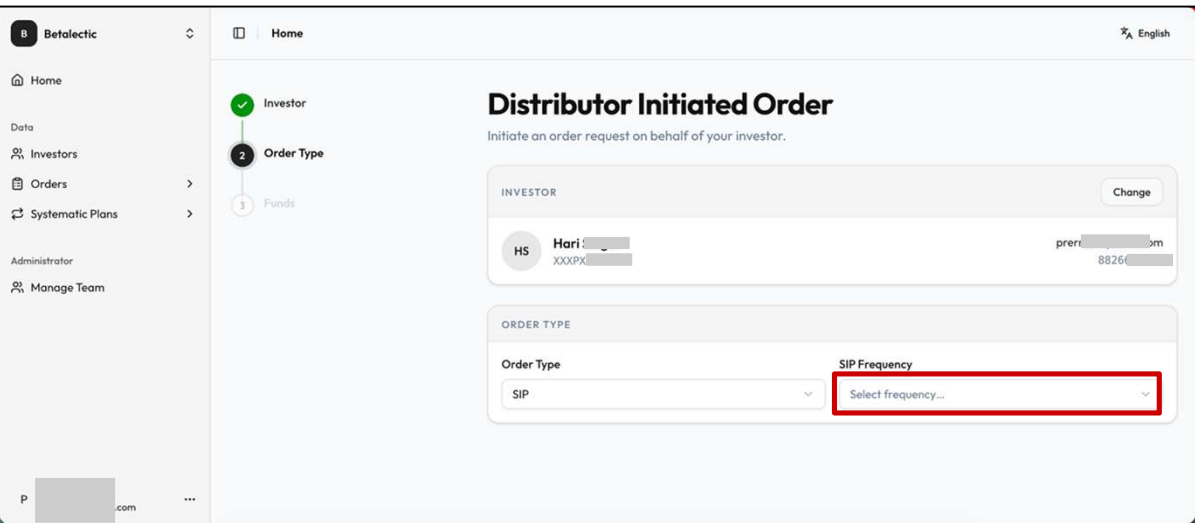
Lumpsum

**SIP**

Redemption

Choose SIP from the drop down menu.

**NCDEX Nidhi**  
Nidhi



**Betalectic** Home English

Home

Data

Investors

Orders

Systematic Plans

Administrator

Manage Team

P [redacted].com

**Distributor Initiated Order**  
Initiate an order request on behalf of your investor.

INVESTOR Change

HS Hari [redacted] XXXPX [redacted] pre [redacted]@om 8826 [redacted]

ORDER TYPE

Order Type

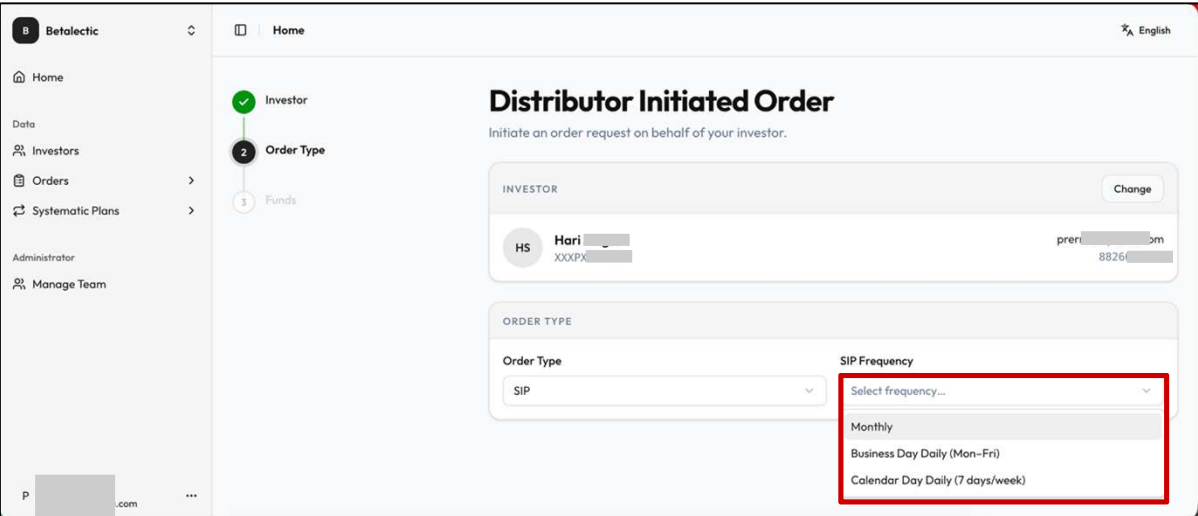
SIP

SIP Frequency

Select frequency...

You will then be asked to pick a SIP frequency.

**NCDEX Nidhi**  
Nidhi



**Distributor Initiated Order**  
Initiate an order request on behalf of your investor.

**INVESTOR** Change

HS Hari XXXP pre 8826

**ORDER TYPE**

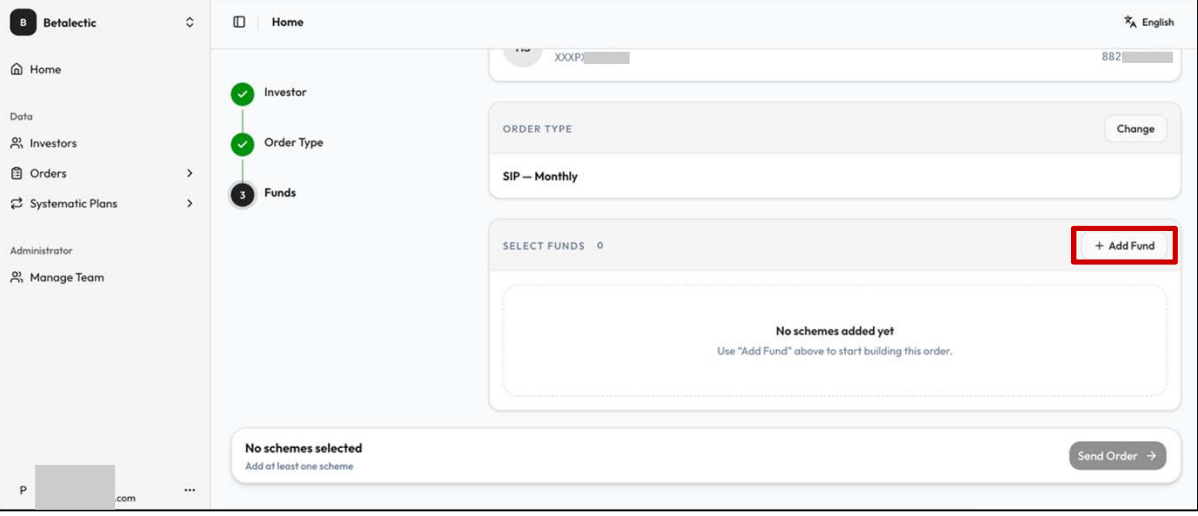
Order Type: SIP

SIP Frequency: Select frequency...

- Monthly
- Business Day Daily (Mon-Fri)
- Calendar Day Daily (7 days/week)

You can choose from 3 SIP frequencies currently available.

NCDEX Nidhi



**Distributor Initiated Order**  
Initiate an order request on behalf of your investor.

**INVESTOR** Change

HS Hari XXXP pre 8826

**ORDER TYPE**

Order Type: SIP

SIP Frequency: Monthly

**SELECT FUNDS** 0 + Add Fund

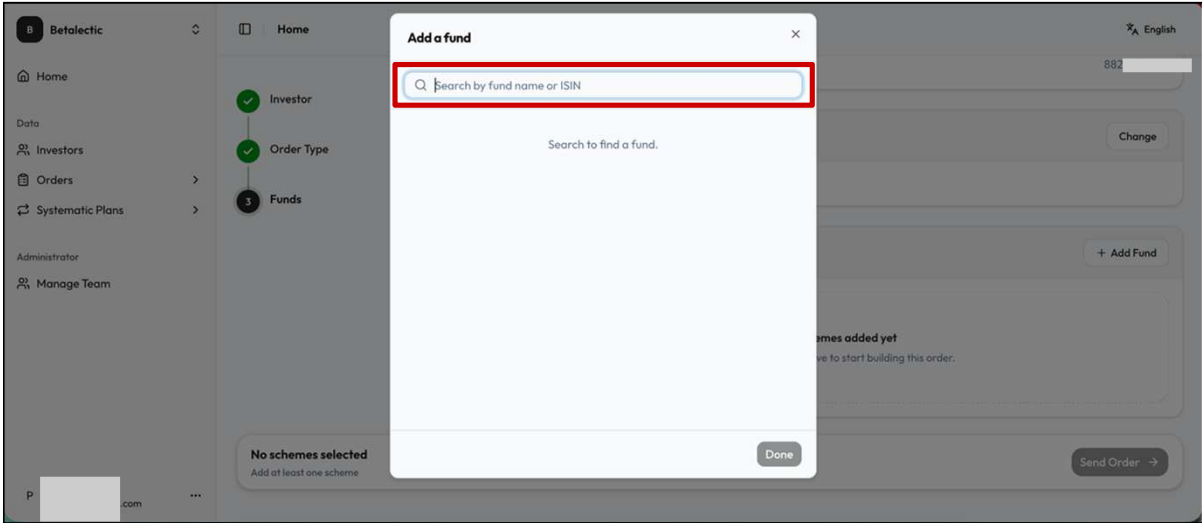
No schemes added yet  
Use "Add Fund" above to start building this order.

No schemes selected  
Add at least one scheme

Send Order →

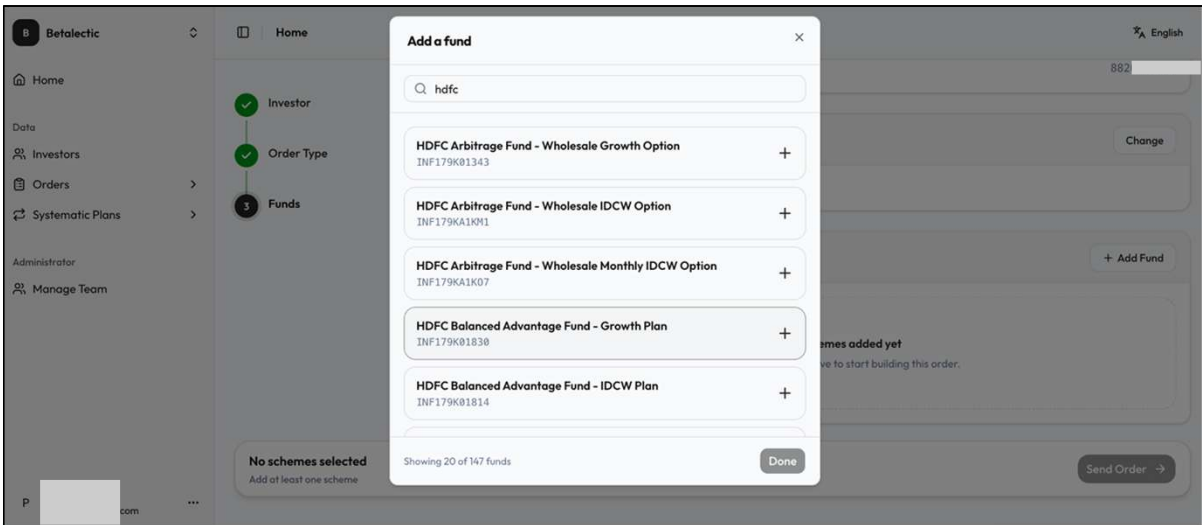
NCDEX Nidhi

A section to add funds will appear. Click on 'Add Fund'.



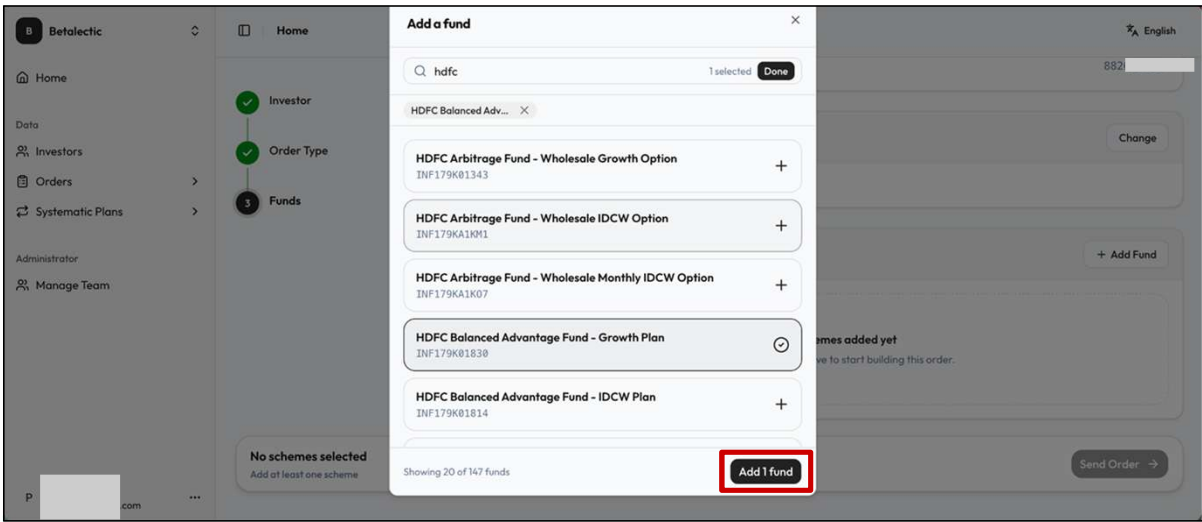
A pop up will appear once you click on 'Add fund'. You can search for schemes by name or ISIN.





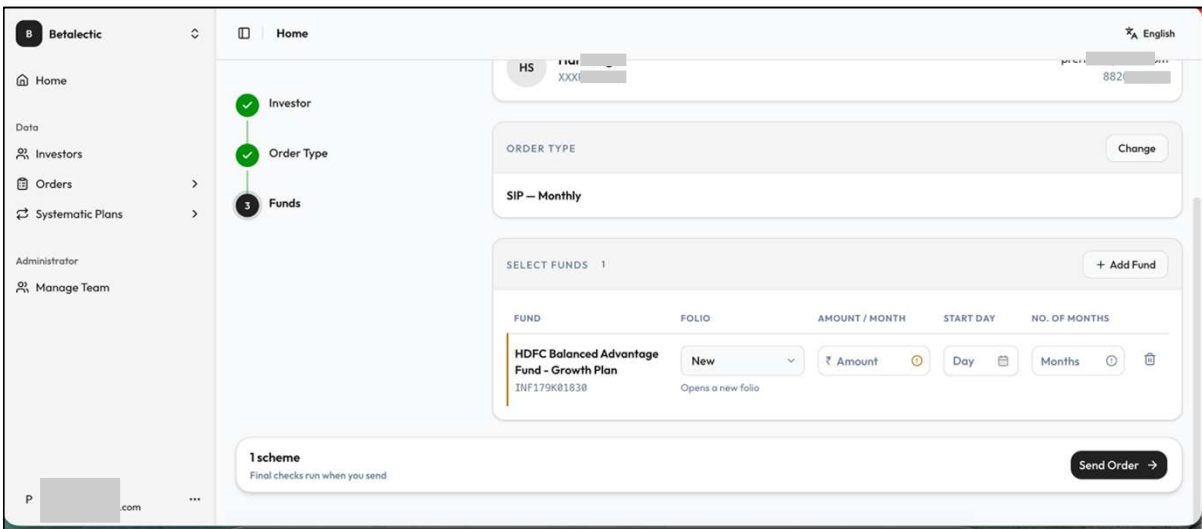
You can add upto 10 funds. Select the required fund/funds.





After selecting the fund/funds, click on 'Add fund(s)'.





You will be required to add details for each fund that you have added. Follow the steps as described below.



Betalectic Home

Investor

Order Type

Funds

ORDER TYPE

SIP - Monthly

SELECT FUNDS 1

FUND

HDFC Balanced Advantage Fund - Growth Plan

INF179K01830

Amount

Day

Months

1 scheme

Final checks run when you send

Send Order

While choosing folio, there are three options:

1. Create a new folio for the investment
  2. Choose an existing folio created on NCDEXNidhi from the drop down
  3. Enter an external folio number that was created on a platform outside NCDEXNidhi
- Choose based on your requirement. Here we are selecting New folio.

Betalectic Home

Investor

Order Type

Funds

ORDER TYPE

SIP - Monthly

SELECT FUNDS 1

FUND

HDFC Balanced Advantage Fund - Growth Plan

INF179K01830

Amount

Day

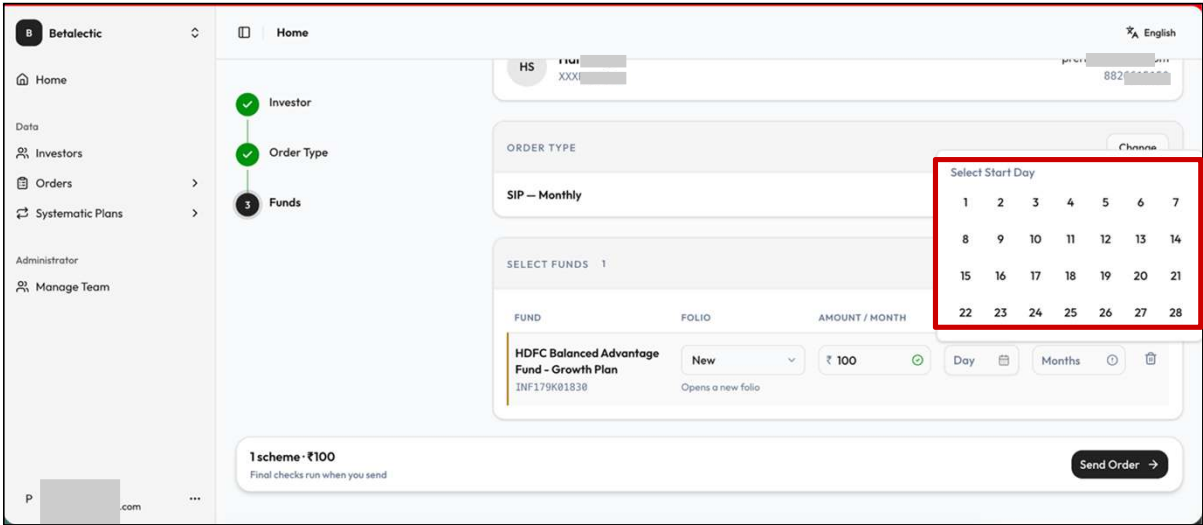
Months

1 scheme

Final checks run when you send

Send Order

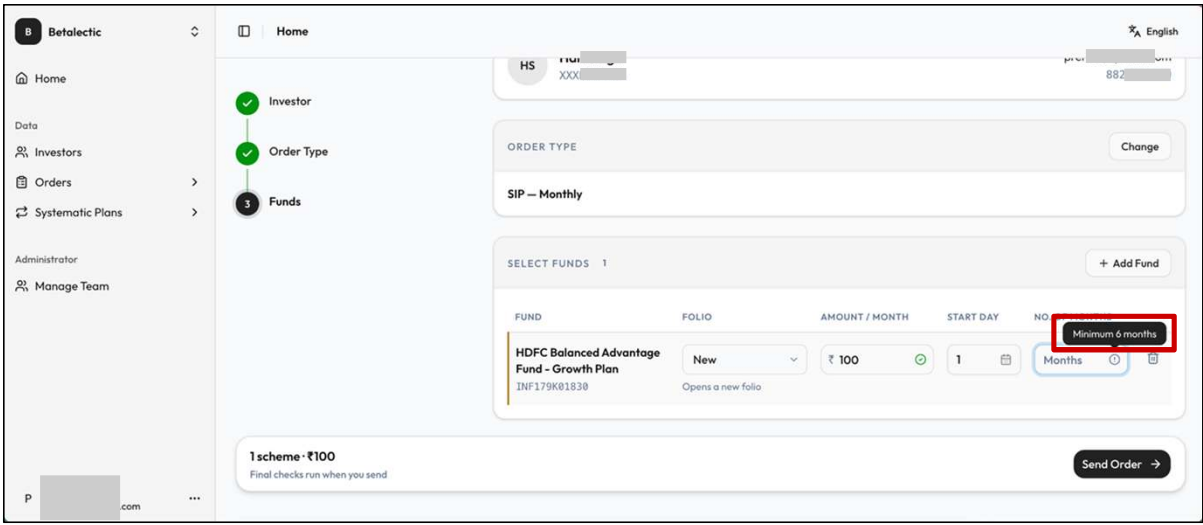
While entering amount, you can check the minimum order amount for that fund by clicking on the 'i' in the amount field.



The screenshot shows the Betalectic web application interface. On the left is a sidebar with navigation options: Home, Data, Investors, Orders, Systematic Plans, Administrator, and Manage Team. The main content area is titled 'Home' and shows a progress bar with 'Investor' and 'Order Type' completed, and 'Funds' in progress. The 'ORDER TYPE' is set to 'SIP - Monthly'. Below this, the 'SELECT FUNDS' section shows one fund selected: 'HDFC Balanced Advantage Fund - Growth Plan' (INF179K01830). The 'FUND' column lists the fund name and folio. The 'FOLIO' column has a dropdown set to 'New'. The 'AMOUNT / MONTH' column shows '₹ 100'. The 'START DAY' column has a calendar icon. A calendar pop-up is displayed, showing a grid of days from 1 to 28. The 'Send Order' button is at the bottom right.

For monthly SIP, click which day of the month you would like the SIP instalment amount to be debited. E.g., if you choose 1, then the SIP amount will be debited on the 1st of every month.

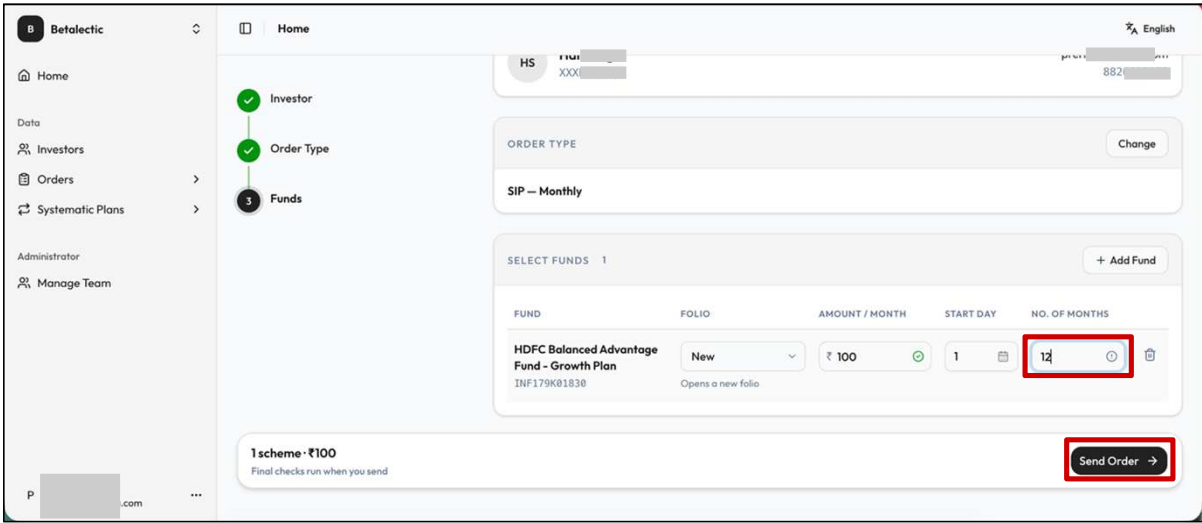
NCDEX Nidhi



The screenshot shows the Betalectic web application interface. On the left is a sidebar with navigation options: Home, Data, Investors, Orders, Systematic Plans, Administrator, and Manage Team. The main content area is titled 'Home' and shows a progress bar with 'Investor' and 'Order Type' completed, and 'Funds' in progress. The 'ORDER TYPE' is set to 'SIP - Monthly'. Below this, the 'SELECT FUNDS' section shows one fund selected: 'HDFC Balanced Advantage Fund - Growth Plan' (INF179K01830). The 'FUND' column lists the fund name and folio. The 'FOLIO' column has a dropdown set to 'New'. The 'AMOUNT / MONTH' column shows '₹ 100'. The 'START DAY' column has a calendar icon. The 'NO.' column shows 'Minimum 6 months'. The 'Send Order' button is at the bottom right.

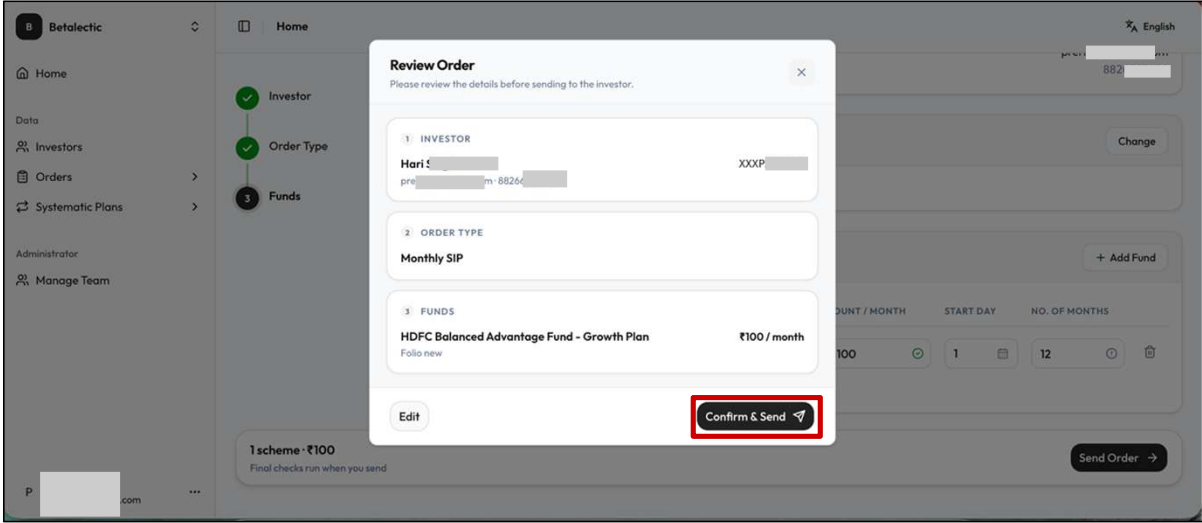
By clicking on '!' you can check the minimum duration for the Fund's SIP.

NCDEX Nidhi



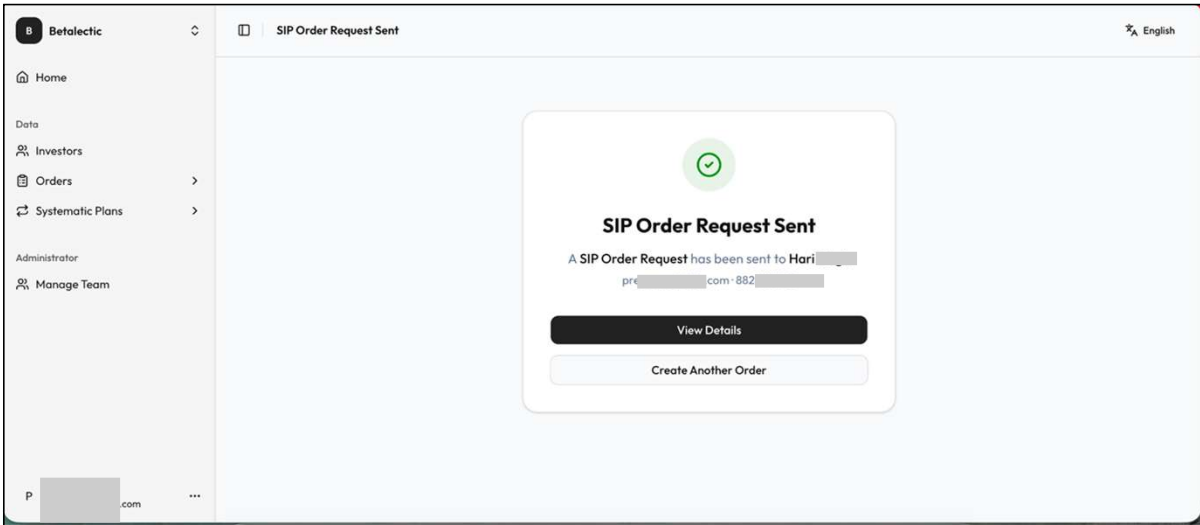
Enter the number of instalments/months you want the SIP to be active for. Check all details and then click on 'Send Order'.

NCDEX Nidhi



A pop up will appear where you can review the order details and edit if required. Click on 'Confirm & Send' to send the order request to the investor where they will have to authorise the order and make the payment.

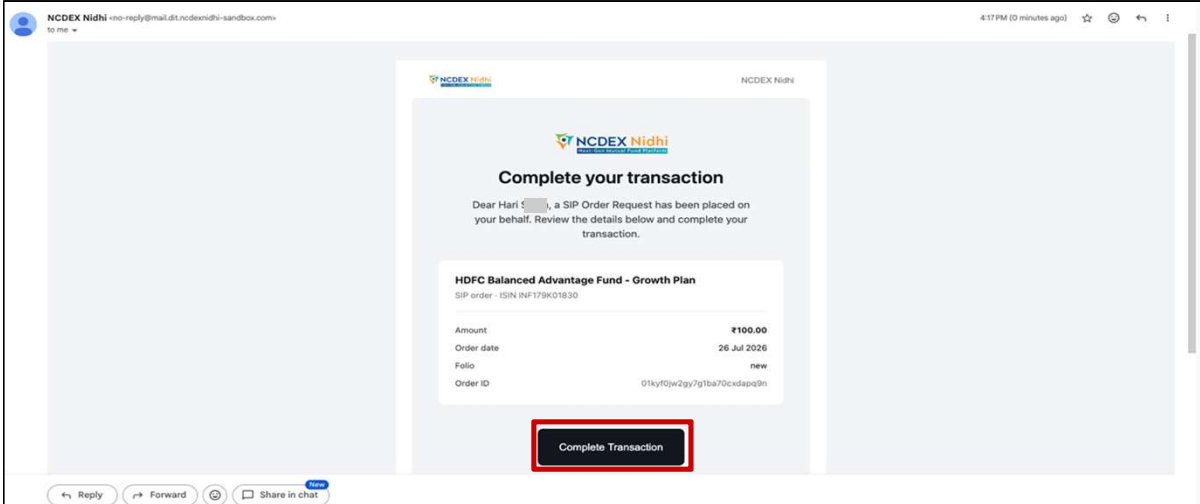
NCDEX Nidhi



The screenshot shows a web application interface for Betalectic. On the left is a sidebar menu with options: Home, Data, Investors, Orders, Systematic Plans, Administrator, and Manage Team. The main content area is titled 'SIP Order Request Sent' and features a green checkmark icon. Below the icon, the text reads: 'SIP Order Request Sent' and 'A SIP Order Request has been sent to Hari [redacted]'. There are two buttons: 'View Details' and 'Create Another Order'.

Once this screen appears, it's a confirmation that the order request has been successfully sent to the investor.

**Investor flow :-**



The screenshot shows an email interface with a header from 'NCDEX Nidhi <no-reply@mail.dti.ncdexnidhi-sandbox.com>'. The email body contains a message titled 'Complete your transaction' addressed to 'Dear Hari [redacted]'. It states: 'a SIP Order Request has been placed on your behalf. Review the details below and complete your transaction.' Below this is a table for 'HDFC Balanced Advantage Fund - Growth Plan' with the following details:

| HDFC Balanced Advantage Fund - Growth Plan |                            |
|--------------------------------------------|----------------------------|
| SIP order - ISIN INF179K01830              |                            |
| Amount                                     | ₹100.00                    |
| Order date                                 | 26 Jul 2026                |
| Folio                                      | new                        |
| Order ID                                   | 01kyf0jw2gy7gtba70cxdapaqn |

At the bottom of the email content is a red-bordered button labeled 'Complete Transaction'.

The investor will get an email and SMS to complete their transaction. They can choose to complete the transaction through either mode.



Order Summary

Folio Details

### Order Summary

Transaction # 01kyf0jw06tj65bcgs0087923f

Type SIP Purchase

### Funds


**HDFC Balanced Advantage Fund - Growth Plan**  
 INF179K01830 | Dynamic asset allocation or balanced advantage

| Folio     | Frequency | Instalments | Recurring Amount |
|-----------|-----------|-------------|------------------|
| New Folio | monthly   | 12          | 100              |

### Setup AutoPay with

Mandate Type

☐ New Mandate

☒ Existing Mandate

Select Existing Mandate

HDFC BANK  
A/C: 4314 Limit: 100.00

☒ Generate First Installment Now

Choose Bank account

HDFC BANK  
A/C: 4314

Select Method





Order Summary

Folio Details

### INVESTOR FOLIO DETAILS

|                                               |                                   |
|-----------------------------------------------|-----------------------------------|
| INVESTOR NAME<br>Hari                         | PAN<br>XXX                        |
| EMAIL<br>pre.com                              | PHONE<br>+91 882                  |
| HOLDING PATTERN<br>Single                     | TAX STATUS<br>Resident Individual |
| DATE OF BIRTH<br>2/08                         | GENDER<br>Male                    |
| COMMUNICATION ADDRESS<br>28 DELHI, 110049, IN |                                   |
| PAYOUT BANK ACCOUNT<br>HDFC BANK   4314       |                                   |

### Setup AutoPay with

Mandate Type

☐ New Mandate

☒ Existing Mandate

Select Existing Mandate

HDFC BANK  
A/C: 4314 Limit: 100.00

☒ Generate First Installment Now

Choose Bank account

HDFC BANK  
A/C: 4314

Select Method



Order Summary

Folio Details

INVESTOR FOLIO DETAILS

|                                                |                                   |
|------------------------------------------------|-----------------------------------|
| INVESTOR NAME<br>Hari                          | PAN<br>XXXP                       |
| EMAIL<br>pr@.com                               | PHONE<br>+91 882                  |
| HOLDING PATTERN<br>Single                      | TAX STATUS<br>Resident Individual |
| DATE OF BIRTH<br>20/08                         | GENDER<br>Male                    |
| COMMUNICATION ADDRESS<br>282 DELHI, 110049, IN |                                   |
| PAYOUT BANK ACCOUNT<br>HDFC BANK   4314        |                                   |
| NOMINEES<br>No nominees registered             |                                   |

Setup AutoPay with

Mandate Type

☒ New Mandate
 ☐ Existing Mandate

Select Bank Account to register a new Mandate

HDFC BANK  
A/C: 4314

New Mandate Type

Net Banking

UPI

☒ Generate First Installment Now

Choose Bank account

HDFC BANK  
A/C: 4314

The investor will first have to select the mandate that they want to use to set up their SIP. They can use an existing mandate or create a new mandate. If they choose new mandate, the investor will have to choose one of their verified bank accounts to set up a new mandate, as well as the method through which they want to set up the mandate. After that, they should click on 'Confirm and Continue'.

DATE OF BIRTH  
20/08

GENDER  
Male

COMMUNICATION ADDRESS  
282 DELHI, 110049, IN

PAYOUT BANK ACCOUNT  
HDFC BANK | 4314

NOMINEES  
No nominees registered

Net Banking

UPI

☒ Generate First Installment Now

Choose Bank account

HDFC BANK  
A/C: 4314

Select Method

Net Banking

UPI

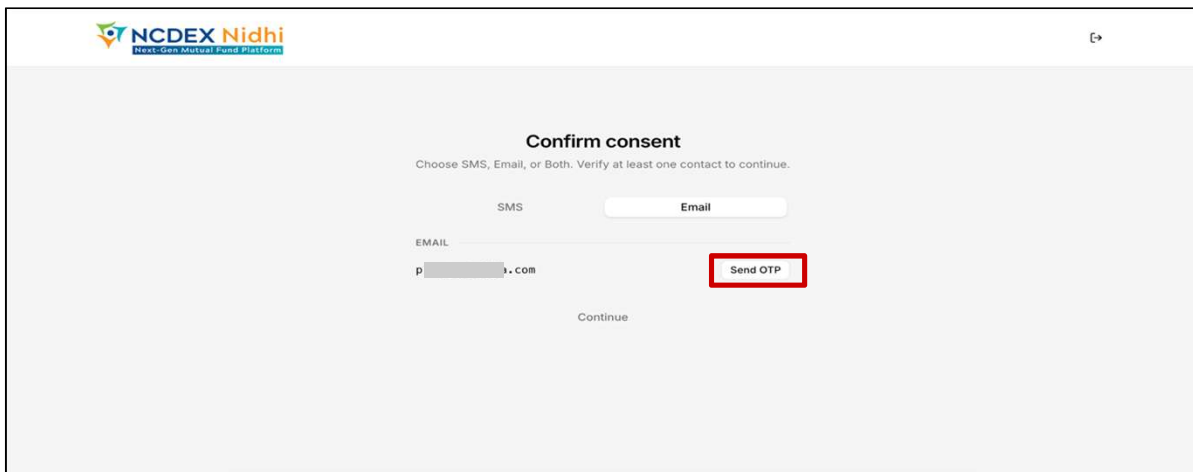
Payment Amount

|                          |     |
|--------------------------|-----|
| Amount to Setup Auto Pay | 100 |
| Amount to Pay Now        | 100 |

Confirm and Continue

If the investor selects 'Generate First Installment Now,' the first instalment of their SIP will be debited on the same day, instead of on the day of month they have chosen as their SIP date. They can choose the verified bank account and payment method through which to make the payment for the first instalment.

**The investor will be redirected to their netbanking/UPI app to set up the mandate**



NCDEX Nidhi  
Next-Gen Mutual Fund Platform

**Confirm consent**  
Choose SMS, Email, or Both. Verify at least one contact to continue.

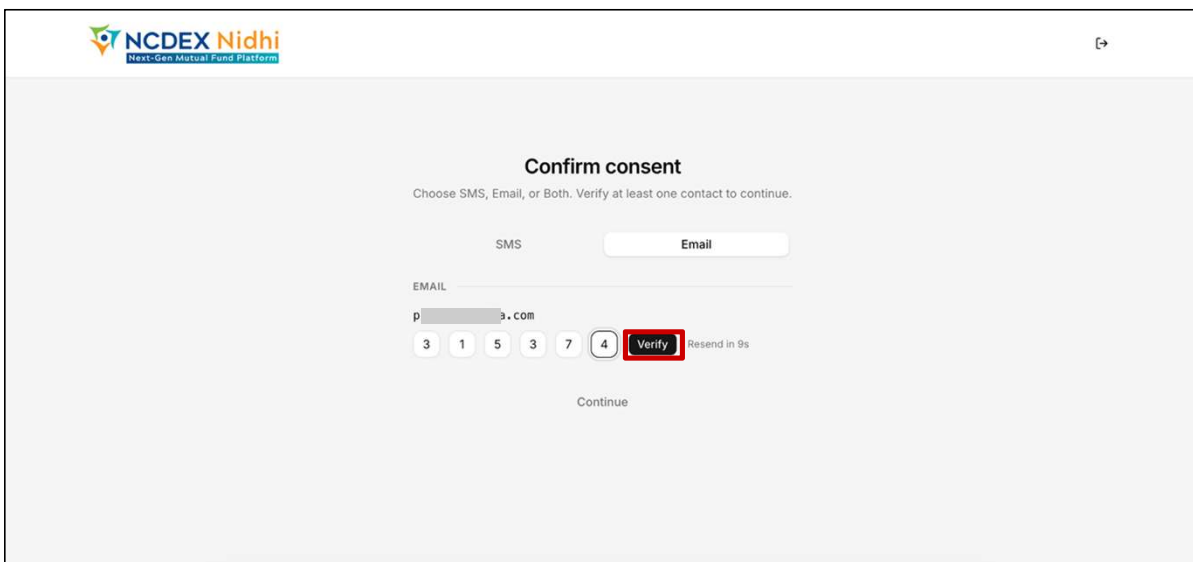
SMS ☐ Email ☒

EMAIL  
p [redacted] .com

**Send OTP**

Continue

The investor has to authorise the transaction by providing consent. They can choose to receive the OTP through SMS or email.



NCDEX Nidhi  
Next-Gen Mutual Fund Platform

**Confirm consent**  
Choose SMS, Email, or Both. Verify at least one contact to continue.

SMS ☐ Email ☒

EMAIL  
p [redacted] .com

3 1 5 3 7 4 **Verify** Resend in 9s

Continue

After entering the OTP, click on 'Verify'.





### Confirm consent

Choose SMS, Email, or Both. Verify at least one contact to continue.

SMS
☐
Email
☒

EMAIL

p  .com ✔ Verified

Continue

After clicking on continue, the investor will be redirected to their netbanking portal or UPI app (based on payment method selected) to complete the payment for their first instalment in case they had selected the 'First Instalment Today' option. Otherwise, the investor will be directly shown an order success page after set up of mandate.





**Payment Successful!**

**Transaction Details**

Transaction ID **01kyf0jw06tj65bcgs00879z3f**      Type **SIP**



**HDFC Balanced Advantage Fund - Growth Plan**

INF179K01830 | Dynamic asset allocation or balanced advantage

| Folio     | Frequency | Instalments | Recurring Amount |
|-----------|-----------|-------------|------------------|
| New Folio | monthly   | 12          | 100              |

You can close this page

Once the investor completes the payment, confirmation screen will pop up, which would confirm the investor that the Payment is successful. Distributor can also log into NCDEX Nidhi portal and check the details.

