

# **BondVue User Onboarding**

Celebrating a passion for secure and rewarding investments, BondVue is your trusted destination for navigating through the bond market with confidence. We strongly believe in the power of bond investments for long-term wealth creation and our primary goal is to enable investors to make informed decisions, through an awareness-first approach. With a commitment to transparency, innovation, and security, we offer a user-friendly platform designed to simplify bond investing for individual and institutional investors. Our passionate team of new-age and experienced professionals are dedicated to provide a seamless experience, enabling users to discover, analyse, invest and trade in a diverse range of government and corporate bonds efficiently.



# **Onboarding Flow Index**

SI No.	User Type	Page No.
1.	INDIVIDUAL	3-19
2.	NON-INDIVIDUAL	20-34
3.	PARTNER	30

If the user is Onboarding as a Individual then they must Follow the following steps:

# Log on to www.bondvue.com and click on Sign In



A. If you are a New Individual User, Select 'Individual' and fill in your basic details



B. Activate your account by verifying your Mobile Number and Email ID



#### C. Select if you want to open or use an existing demat account



#### D. Open New demat account: Follow the simple KYC Process by clicking on this link



E. Use existing Demat account - start by verifying your Aadhar and PAN by clicking on the Digilocker button



#### Individual / Sign Up / Digilocker verification

F. Enter Mobile Number/Username/Aadhar Number and verify with you 6 Digit Security PIN



#### Individual/Sign Up / Digilocker verification G. On successful verification your Aadhar & PAN Card details will appear.

	Pan & Aadhar	Bank Details	Demat	Additional Details
	Your P	an Details		
Empower your financial future with smart				
insights and personalised portfolio				
management at BondVue		PAN Number		
		Name		
		Gender		
		C VMLV		
150 9.05% BAJAJ FINANCE	Your A	adhar Details	enneu	
7.18% GS 2033 + UP 867 + UY 634% INE296A07FV8				
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		Date of Birth	STRUE .	
Bond Details		Gender		
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Omerican         registring *           * 13855551 (BETER         8.29 %				
O     O     Noniter direct     O     O     Trendline		Address		
		Pin Code		
ATURTY 721 2012-2000		State		
		XML V	erified	
0 0 .0				
		Next		

If verification is unsuccessful then upload you aadhar and PAN manually for verification.

#### Individual/Sign Up/Bank Verification

H. Enter Bank Account details for bank account verification.



Rs 1/- will be credited to your account on successful verification\*

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#### Individual/Sign Up/Demat Verification

Enter your Demat account details and upload your 'Client Master List' (CML) copy. Ι.



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#### Individual/Sign Up/Additonal Details

J. Enter additional details as required and Sign on the Digital Signature board.



#### Individual/Sign Up/Esign Review

K. Review e-KYC form generated on the e-Sign page



#### Individual/Sign Up/Esign

L. Finally, complete the onboarding by clicking on **e-Sign** and entering your aadhar details to complete the e-Sign.

		Sign now	
) Q ^   V 1 of 10	- + Automatic Zoom ~	C 🖶 🕒 I 🖉	»
Fingeek Digital Private Limited Registered Office: 38, 3rd Floor, 226/1 Acha Chandra Bode Road, Kol - 20 CIN: U66120WB2023PTC263057 SEBI Registration No: INZ000318033 NSE Member ID: 90385	rya Jagdish	BOND WITH US	Î
	Know your Client (KYC)		
Application Type* 🖌 New KYC	Application form for Non-Individuals only           KYC Modification	KYC Number: <b>BO</b> Mଏଏଡ	
1.Entity Details			
PAN Number (Enclose attested copy of the PAN)	e) i recificates		
Name (as per PAN)			
Date of Incorporation	26/06/2023		
Date of Commencement			
GST Identification:			
LEI Number			
Entity Type	Corporate Body  Partnership Firm Trust/Charity/NGO LLP HUF	Registered Society     AOP       Government Bodies     Others	
2.Address Details			
Registered Address' Line 1*			

Please save a copy of the final copy of the Esigned Document.

M. Sign Up Successful! Now the user may complete their Risk Profile and start Exploring Bonds.



N. Once the e-sign is completed. Your account is moved for <u>CBRICS Registration</u> and you receive an email from Exchange with your Participant Code (Please save for future reference).

Your re 1 message	gistration on CBRICS Portal	
NSE Team Tousanter	<msm@nse.co.jn></msm@nse.co.jn>	Thu, Apr 10, 2025 at 12:52 PM
	Dear Participant, We have received the following CBRICS Portal re Name Participant Code	gistration request
	Pan No.	
	We will inform you by email about the status of yo Thanks, Support Team NSE For any clarification or queries, please reach us a 50).	ur registration request. t cbrics@nse.co.in (Toli free number 1800 26600

C National Stock Exchange of India Ltd

O. When your account is CBRICS Approved you receive an email from NSE, with your status as 'Approved'. If not approved please reach out to Team BondVue.

1 message		
NSE Team	<msm@nse.co.in></msm@nse.co.in>	Thu, Apr 10, 2025 at 12:57 PM
IO. S CERN	TREATING PAR	
		<b>WINSE</b>
	-	
	Dear Participant.	
	bear i aroopant,	
	Following is the status of your C	BRICS registration request.
	Name	
	Participant Code	
	Pan No.	
	Status	Approved
	Thanks, Support Team NSE For any clarification or queries, 1 50).	please reach us at cbrics@nse.co.in (Toll free number 1800 26600

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# **Non Individuals**

(applicable for Corporate Body, LLP, HUF, Trust, AOP, Partnership firm, Registered Society, Government Bodies and other entity)

If the user is Onboarding as a Non Individual then they must Follow the following steps:

# Log on to www.bondvue.com and click on Sign In



A. If you are a New Non-Individual User, Select 'Non-Individual' and fill in your basic details



B. Activate your account by verifying your Mobile Number and Email ID



#### Non Individual/Sign Up/Entity Type

C. Select Entity Type



#### 

#### Non Individual/Sign Up/Company Verification

D. Enter and Verify GST Number and CIN (If Applicable)



#### Non Individual/Sign Up/PAN Verification

#### E. Enter and Verify PAN Details



#### Non Individual/Sign Up/Bank Verification

F. Enter Bank Account details for bank account verification.



Rs 1/- will be credited to your account on successful verification\*

#### Non Individual/Sign Up/Demat Verification

G. Enter your Demat account details and upload your 'Client Master List' (CML) copy.



#### Non Individual/Sign Up/Related Person Details

Bang

H. Enter the details of the Related person (Eg. Director, Authorised Person, Promoted, Trustee, etc.)

& Olufsen Audio	
	GST & CIN Pan Bank Details Demat Related Person Details
	Pan Number
	ENTER PAN NUMBER
	Name (as per PAN)
Empower your financial future with smart insights and personalised	Enter Name (os per PAN)
portfolio management at BondVue	Maiden Name (if any)
	Enter Molden Nome
	Father's Name
	Enter Father's Name
	Mother's Nome
AND PLOY BALAJ FINANCE ONDYUE	Enter Mother's Name
7.18% GS 2033	Residential Status"
	Select Residential Status*
	Related Person Type*
Towner Corps	Select Related Person Type V
Bond Details Assessment	DIN
The branch wanted Control of State (19) Stat	Enter DIN
© © septence ± statuss ta Errors to 30 % Build your Portfolio through Bond Investments	
nogeneration Trendline ()	Gender () Male () Female () Others
	Marital Status 🔿 Single 🔿 Married
Payment own 10 bW 150 JM Can 17 Vector Vector Vector Vector	
College Bouldow Hackanty and	Nationality 💿 Indian 🔿 Others
	I am an Indian Citizen and a Tay Resident of India
	and no other country (FATCA) Ves O No
	I am a not Politically Exposed Person (PEP) or  elited to a PEP Yes No
	Dreef Of Identity
	Select Proof Of Identity
	, Your Signature
0 0 •	

#### Non Individual/Sign Up/Esign Review

I. Download and review the KYC document (If Applicable) before e-sign and Download the documents that appear under the Non - Individual Section, manually fill them and upload.

Bang & Olufsen Audio	← ₿₽		Ingeek Digital Private Limited agistered Office: 38, 3xt Floor, 226/1 Achary Itandra Bode Read, Kol - 20 21N: U86120WB2023PTC263057 EBB Registration No: IN2000318033 4SE Member ID: 90385	ya Jagdish	BOND WITH US
	3			Know your Client (KYC)	
	Pronie Criedoon KTC Process E-sign		Application Type* 🕢 New KYC	KYC Modification	KYC Number: B000545
Empower your financial future with smart insights and personalised	E-Sign		1.Entity Details		
portfolio margament at BondVue			DAM Number	HYOP SR235M	12
For the second se		-	Name (as per PAN)	vash shama	
	Please verify details and E-sign  the PDE to Complete your Description Descrip		Date of Incorporation	26/06/2023	
	onboarding with Bandyue		Date of Commencement		
			GST Identification:		
			LEI Number		
	Proceed To E-Sign	_	Entity Type	Corporate Body  Partnership Firm Trust/Charity/NG0 LLP HUF	Registered Society AOP     Government Bodies Others
	Non -Individual		2 Address Details		
7.18% GS 2033	Download the three forms one by one, fill them manually and uplaad each	_	Registered Address' Line 1*		
	one under their nome.		Line 2		
	Promoter Information Dromoter Information		Line 2		
	Download		City/Town/Village*		
Come and Com	Ultimate Beneficiary Owner		State / U.TCode*		
Bond Details Anag Agenut	Download	Ø ···	Correspondence/Local Address in	India (if different from above)*	
Alternational Constant VIELD PRICE		<b>1</b> 01	Registered Address' Line 1*		
13.20 % P96.00	PATCA Declaration FATCA Declaration	-	Line 2		
Participant and a second secon			Line 3		
			City/Town/Village*		
6 Wein 3 Trendlave C State C S	Save & Continue Later		State / U.TCode*		
Payment 0w 10 1W 100 14 (14)		<b>\$</b>	3 Bank Details:		
		_	Account -01		
And the second se			Bank Name Kotak M	abindra Bank Account Number	0545410119
			Account Type	IFSC Code	KKBK0006570
			Bank Address 21 CENTRE	POING BUILDING HEMANTA BASU SARANI KOLKATA 7	20001
			Name as per Bank YASH SH	ARMA Name as per PAN	YASH SHARMA
			support@boodvia.com	01 www.bondwie.com	Applicant e-SIGN

#### Non Individual/Sign Up/Esign Document

J. After uploading the Non Individual documents, E-sign the document by clicking on the Sign Now button and verifying the same with your Aadhar and OTP.

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Fingeek Digital Private Limited Registered Office: 3B, 3rd Floor, 226/1 Acha Chandra Bode Road, Kol – 20 CIN: U66120WB2023PTC263057 SEBI Registration No: INZ000318033 NSE Member ID: 90385	rya Jagdish	BOND WITH US
	Know your Client (KYC)	
Application Type* 🖌 New KYC	Application form for Non-Individuals only           KYC Modification	KYC Number: BO 10060
1.Entity Details		
PAN Number (Enclose attested copy of the PAN)	and a set have	
Name (as per PAN)		
Date of Incorporation	26/06/2023	
Date of Commencement		
GST Identification:		
LEI Number		
Entity Type	Corporate Body   Partnership Firm   Trust/Charity/NGO  LLP   HUF	Registered Society AOP     Government Bodies Others
2.Address Details		

#### **Non-Individual**

K. Once the e-sign is completed. Your account is moved for <u>CBRICS Registration</u> and you receive an email from the Exchange with your Participant Code (Please save for future reference).

Your regist	ration on CBRICS Portal		
NSE Team <ms Toubusetor</ms 	n@nse.co.jo>	Thu, Apr 10, 2025 at 12:	52 PM
		<b>ONSE</b>	
De	ar Participant, have received the following CBRICS Portal re	gistration request	
N	me		
Pa	rticipant Code		
Pa	n No.		
We	will inform you by email about the status of yo	ur registration request.	
Th Su	anks, oport Team E		
Fo 50	any clarification or queries, please reach us a	t cbrics@nse.co.in (Toll free number 1800 26600	

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#### **Non-Individual**

L. When your account is CBRICS Approved you receive an email from NSE, with your status as 'Approved'. If not approved please reach out to Team BondVue.



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**Partner** (applicable for Wealth Manager, RIA, IFAs, Distributors and other entity) If the user is Onboarding as a Partner then they must Follow the following steps:

# Log on to www.bondvue.com and click on Sign In



A. If you are a New Partner User, Select 'Partner' and fill in your basic details



B. Activate your account by verifying your Mobile Number and Email ID



#### Partner

1. To Sign Up as an Individual refer to pages <u>3-19</u>.



#### Partner

1. To Sign up as a Non Individual refer to pages <u>20-34</u>.



#### BOND WITH US



Congratulations! Your BondVue profile has been created



#### 

Select	^
Corporate Body	
LLP	
HUF	
Trust	
AOP	
Partnership Firm	
Registered Society	
Government Bodies	
Others	



### If you require any further assistance, Please feel free to reach out to us at:

Email: <u>support@bondvue.com</u> Call us at: 9088877677