

# Systematic Transfer Plan (STP) – Enrolment Form



MUTUAL FUND  
Profit with Process

Date and Time of Receipt
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Folio Number (For existing unit holders) / Application Number
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Date 

dd	mm	yy
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First Applicant	
Second Applicant	
Third Applicant	

To  
The Trustees, Quantum Mutual Fund

I/We have read and understood the contents of the Scheme Information Document and Statement of Additional Information of the respective scheme(s) and the instructions overleaf. I/We hereby apply to enroll for the STP facility available under the following Scheme/Plan/Option and agree to abide by the terms and conditions of the respective Scheme/Plan/Option.

Transfer from : Scheme Name: \_\_\_\_\_ Plan / Option: \_\_\_\_\_

Transfer to : Scheme Name: \_\_\_\_\_ Plan / Option: \_\_\_\_\_

Type of STP Plan / Frequency     Daily     Weekly     Monthly (Please refer instructions No.6 for Daily/Weekly STP)

Date of Transfer (For Monthly Only)     1                       15

Amount of transfer per Installment : Rs. \_\_\_\_\_

Enrolment Period :                      From 

dd	mm	yy
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    To    

dd	mm	yy
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Name	Signature
Sole/First Applicant	
Second Applicant	
Third Applicant	

Acknowledgement for STP Quantum Mutual Fund

Received from Mr./Ms. _____	STP application for transfer of units	
From Scheme / Plan / Option _____	<table border="1" style="width: 100%; height: 40px;"> <tr> <td style="text-align: center;">Acknowledgement Stamp</td> </tr> </table>	Acknowledgement Stamp
Acknowledgement Stamp		
To Scheme / Plan / Option _____		

## INSTRUCTIONS FOR SYSTEMATIC TRANSFER PLAN (STP)

- 1 Investors to ensure that they provide their Folio No. alongwith the STP details.
- 2 This form should be submitted at least 10 business days before the commencement date.
- 3 Minimum amount Quantum Long Term Equity Fund - Rs. 6,000 and Quantum Tax Saving Fund - Rs.3,000. There should be a minimum of 6 transfer instructions for enrollment under Monthly Transfer Plan and 2 transfer instructions under Quarterly Transfer Plan. A minimum of Rs. 1,000 on each transfer date incase of monthly plan for Quantum Long Term Equity Fund and a minimum of Rs. 500 on each transfer date incase of monthly plan for Quantum Tax Saving Fund. Multiples of Re. 1 in Quantum Long Term Equity Fund and Rs.500 in Quantum Tax Saving Fund thereof can be transferred thereafter. The initial amount required to open a folio / account in the transferee scheme shall be governed by the Scheme Information Document of that scheme.
- 4 Units in the transferee scheme will be allotted at the NAV related prices of the 1st/15th of every month (or next business day, if the 1st/ 15th day is a holiday). An updated account statement will be sent to the unit holder after each transaction, indicating the new balance to his or her credit in the account.
- 5 Amount so invested will have an exit load as applicable to the designated transferee scheme.
- 6 Instructions for Daily and Weekly STP
  1. Daily / Weekly STP is only available in Quantum Liquid Fund
  2. Minimum Daily STP Amount (only on business day) - Rs.100 and in multiple of Rs. 100 /- thereafter.
  3. Minimum Weekly STP Amount ( on every Monday if Monday is non- business day, then the immediate next business day) - Rs.500/- and in multiple of Rs.100/- thereafter
  4. Minimum Number of Installment Daily STP - 132
  5. Minimum Number of Installment Weekly STP - 24
  6. Daily / Weekly STP is available under Growth Option / Monthly Dividend Option / Daily Dividend Re-investment Option.
  7. The application for Daily / Weekly STP should be submitted at least 10 business days in advance before the commencement date.

# Profit with Process.

“You can trust Quantum’s tried and tested disciplined investment process and low cost approach for long term wealth enhancement”

Ajit Dayal

Director, Quantum Asset Management Company Private Limited



## Quantum Mutual Fund

Call Now: Toll Free: 1800-22-3863 (BSNL / MTNL) Or 022-2282-9414  
Log onto [www.QuantumAMC.com](http://www.QuantumAMC.com)

Mutual Fund investment are subject to market risk. please read the offer document carefully before investing.