



Central Depository Services (India) Limited

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COMMUNIQUE TO DEPOSITORY PARTICIPANTS

CDSL/OPS/DP/EASI/2020/150

March 20, 2020



ADDITIONAL FACILITY OF GROUPING OF ACCOUNT FOR “Easi/Easiest” USER

DPs are advised to refer to our Communique nos. **CDSL/OPS/DP/381** dated March 4, 2004 and **CDSL/OPS/DP/1418** dated January 12, 2009 and wherein we have informed the procedure and facility of grouping of BOIDs under one main login

DPs are aware that currently, when East/Easiest user groups multiple BOIDs [Maximum 8] to his/her primary login id, a grouping registration form is available to the user. The grouping form has to be signed by the respective grouped account holders and submit the said form to their respective Depository Participant [DP] wherein the grouped account is held, for authentication. Respective DP will verify the grouping form and will authenticate the grouping from DPs easiest login id.

CDSL is now pleased to inform the DPs about the release of additional facility of grouping for the easi / easiest BO (first holder of the primary login ID) who is the sole holder / joint holder in the other 'to be grouped' account, whereby the demat account holder will be able to group other demat account/s without submitting duly signed grouping request form to the DP. This facility is available only to Individual/NRI (new users) at the time of registration. In case of existing users, the demat accounts wherein the user is one of the sole / joint holders will be available to the user for selection, from the miscellaneous menu → edit groupings option. User has to tick mark the demat accounts which BO wishes to group to his/her primary login id.

It will be mandatory that the 'to be grouped' demat accounts should have a registered email ID and mobile number registered for SMS alert facility.

PROCEDURE FOR GROUPING OF BOID AT THE TIME OF REGISTRATION FOR EASI / EASIEST:

- (i) The BO has to enter the 16 digit demat account no. as the login name and password which is the PAN no. followed by first 4 digits of birth date (as recorded in the demat account) and the Captcha.
- (ii) OTP [one time password] is sent to the BO on the registered mobile number [in case of Individual BO] and on the registered email ID in case of NRI. On the basis of PAN of the first holder of the demat account (primary login), the system will display the details of all other CDSL demat accounts held by the same PAN as the sole / joint holder for selection.



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- (iii) BO has to select the BO IDs displayed for auto grouping, which BO wishes to view from his primary login.
- (iv) Once the BO completes the Easi/Easiest registration procedure after selection of the grouped accounts, Email alert will be sent to the first holder on the registered email IDs and SMS alert will be sent to SMART registered mobile numbers of such 'other - to be grouped' CDSL demat accounts informing about the 'Grouping'.

Further, if such other-to be grouped account do not have registered email id and SMART registration, the current procedure of submission of duly signed grouping request form (physical) to the respective DP will be followed. Such grouping form will have column wherein the BO has to mention the email ID and mobile number for SMART registration. DP has to update the email id and has to register the mobile number for the SMART facility in the demat account. Then only the DP will be able to authenticate the EASI grouping. In case the DP tries to authenticate the such grouped account wherein in the primary holder is one of the holder in the grouped account, system will display an error "Please add the Email id & Mobile no. for this BOID and also register the Mobile no. for SMART", only after updation of email ID and SMART registration in CDSL system for such demat account DP will be able to authenticate the Easi grouping.

Further, in case of other grouping the existing process of grouping of accounts i.e. submission of physical registration form duly signed by all holders to the DP of to be grouped account will be continued.

DPs are advised to take note of the same and inform their BOs about this facility.

Queries regarding this communiqué may be addressed to:

- **CDSL – Helpdesk:** on telephone numbers (022) 2305-8624, 2305-8639, 2305-8642, 2305-8663, 2305-8640, 2300-2041 or 2300-2033. Emails may be sent to: helpdesk@cdslindia.com.
- **CDSL – Operations:** on (022) 2305-8522, 2305-8648 or 2305-8655. Emails may be sent to: easiadmin@cdslindia.com.

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