

## Benefits of Holding Mutual Funds in Demat Form for Investors

- 01 Consolidated Portfolio Management**

A demat account allows you to view your investments—stocks, bonds, ETFs, and mutual funds—at one place, simplifying portfolio tracking and management.
- 02 Flexibility to Pledge/ Lien Marking**

Mutual fund units in demat form can be pledged as collateral for loans, offering additional financial flexibility.
- 03 Easy Exit - Transfers and Transmission**

Transferring mutual fund units (e.g., as gifts, sale or inheritance) is seamless with a demat account. Nominees/Joint holders can receive units upon the holder's demise.
- 04 Ease of Transactions**

Client Master Modifications, Subscription and Redemption (NSDL SPEED-e can be used for instant mutual fund redemption) of mutual fund units is faster and efficient in demat form, as all transactions are recorded electronically.
- 05 Automatic Credit of Dividends and Bonuses**

All entitlements like Dividends, interest payments against units are automatically credited to your Bank account linked with demat account, ensuring no entitlements are missed.
- 06 Convenience**

Dematerialization eliminates the need for multiple statements reducing administrative tasks and associated errors.
- 07 Tax Filing Made Easy**

Detailed transaction records and consolidated statements for easy reconciliation, simplifying tax filing and compliance for mutual fund investments.
- 08 Enhanced Security**

Mutual fund units held in demat form are protected from risks like theft, forgery, or physical damage to statements.



## Contact Us

### Email ID :

- DP helpdesk
- MF operations support
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- Investor services
- Participant services
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- CAS related billing
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- SPEED-e related queries
- E-voting

Helpdesk@nsdl.com  
funds.dep@nsdl.com  
ccinterface@nsdl.com  
relations@nsdl.com  
Participant-Interface@nsdl.com  
surveillancecell@nsdl.com  
Casbilling@nsdl.com  
Product@nsdl.com  
Starcom\_Speed@nsdl.com  
evoting@nsdl.com



### Contact :

Reception - 022 6944 8400 / 8515

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[www.nsdl.co.in](http://www.nsdl.co.in)



**Head Office Mumbai**

**National Securities Depository Limited**

3rd Floor, Naman Chambers, Plot C-32, G-Block, Bandra Kurla Complex, Bandra East,  
Mumbai, Maharashtra - 400 051.