

**Date:**

To,

**KFin Technologies Limited (“Company”)**,  
 301, The Centrium, 3<sup>rd</sup> Floor,  
 57, Lal Bahadur Shastri Road, Nav Pada,  
 Kurla (West) Mumbai,  
 Maharashtra - 400070

**Sub: Declaration regarding Category and Beneficial Ownership of Shares**

Ref: PAN : \_\_\_\_\_

DP ID / Client ID / Folio No. : \_\_\_\_\_

With reference to the subject cited, and in connection with the appropriate withholding of taxes on the dividend payable to me / us by the Company, I / We hereby declare and confirm that:

- i. I / We \_\_\_\_\_ (Name of member), am / are a tax resident of India for the period April 01, 2026 to March 31 2027.
- ii. Select as applicable

	We qualify as an “ <b>Insurer</b> ” as per Section 2(7A) of the Insurance Act, 1938 and have full beneficial interest with respect to the equity shares held by in the Company; and we are submitting self-attested copy of PAN Card and certificate of registration with Insurance Regulatory and Development Authority of India
	We are <b>Mutual Fund</b> specified in Schedule VII of the Income Tax Act, 2025 and are the beneficial owner of the Equity shares held by in the Company; and we are submitting self-attested copy of PAN Card and certificate of registration with the Securities and Exchange Board of India
	We are <b>Alternative Investment Fund</b> established in India and are the beneficial owner of the Equity shares held in the Company; and our income is exempt under Schedule V of the Income Tax Act, 2025 and are governed by SEBI regulations as Category I or Category II AIF; and we are submitting self-attested copy of the PAN card and certificate of registration with the Securities and Exchange Board of India
	We are _____ ( <b>category of the entity</b> ) and are the beneficial owner of the Equity shares held in the Company; and are not subject to withholding tax under Section 393 of the Income Tax Act 2025 and we are submitting self-attested copy of the documentary evidence supporting the exemption status along with self-attested copy of PAN card

	We are eligible person _____ (category of person mentioned by provision) in terms of Section 11 of the Income Tax Act, 2025 and are the beneficial owner of the Equity shares held in the Company; and our income is exempt under Section 11 of the Income Tax Act, 2025 and we are submitting self-attested copy of the documentary evidence supporting the exemption status along with self-attested copy of PAN card.
	We are <b>(Recognized Provident Fund / Approved Superannuation Fund / Approved Gratuity Fund / New Pension System Trust / any other entity entitled to exemption from TDS)</b> and are the beneficial owner of the Equity shares held in the Company; and are exempted from TDS deduction under (Please specify the relevant Section / Rules giving exemption under the Income Tax Act); and we are submitting self-attested copy of the documentary evidence supporting the exemption status ( <i>e.g.</i> , relevant copy of registration, notification, order, <i>etc.</i> ) along with self-attested copy of PAN card

- iii. I / We further indemnify the Company for any penal consequences arising out of any acts of commission or omission initiated by the Company by relying on my / our above averment.
- iv. I / We hereby confirm that the above declaration should be considered to be applicable for all the shares held in the Company under PAN / accounts declared in the form.

I / We hereby confirm that the declarations made above are complete, true and bona fide. This declaration is issued to the Company to enable them to decide upon the withholding tax applicable on the dividend income receivable by me / us.

I / We further confirm that I / we will immediately inform the Company if there is a change in the status.

Yours sincerely,

For \_\_\_\_\_ (Name of member)

**Authorized Signatory**

Name : \_\_\_\_\_

Designation : \_\_\_\_\_

Email ID : \_\_\_\_\_

Contact No. : \_\_\_\_\_

Address : \_\_\_\_\_

*\* Strike through whichever is not applicable*