FAQs – Investor Transaction Website

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Click the question to access the answer.

FAQs – Investor Transaction Website

A] Create new folio.

1] How can I create a new folio?

- Visit the transaction website at https://invest.edelweissmf.com/
- Enter your PAN.
- Validate contact details via OTP. Provide FATCA, Joint holder, Nominee, and Bank information.
- Choose a scheme and specify the amount.
- Execute payment and submit the transaction.
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2] Who can create a new folio?

- A new folio can be created for PAN holders with legal statuses such as resident individual or non-resident individual (NRI).
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3] Do I need to authenticate email id and mobile no. with OTP?

- Yes. Authentication requires receiving and confirming two separate OTPs, one sent to your email address and another to your mobile number.
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4] Do I need to add unique contact details for joint holders?

- Yes. In the case of joint holders, it is mandatory to have at least one unique contact detail.
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5] Adding nominee is mandatory?

- When creating a new folio, it is essential to either provide nominee details or submit an "opt-out" declaration.
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6] I am not able to add bank?

- A penny drop verification is required when adding a bank account for mutual fund investments. Banks that support Third Party Verification are eligible for mutual fund investments.
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7] Can I create zero (0) folio?

- There is presently no provision for creating zero folios.
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8] How will I come to know when folio is created?

- A transaction confirmation page will be displayed after submitting your transaction.
- Instantly, you will receive email, SMS, and WhatsApp notifications upon transaction submission.
- Notifications regarding acceptance, rejection, or unit allotment will be communicated to you through your registered contact details.
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9] When can I see my folio in login account for additional purchase?

- Your folio will be visible in your login account within 2 business days from the unit allotment date.
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B] Login

1] How can I login?

- Visit the transaction website at https://invest.edelweissmf.com/
- Enter your PAN.
- For existing investors, an OTP will be sent to your registered contact details. Please authenticate this OTP to log in.
- View screen recording.
- Back to Index.

2] Who can login?

- PAN holders with legal statuses such as resident individual, non-resident individual (NRI), HUF, Minor through guardian PAN can login.
- Back to Index.

3] Who cannot login?

- PAN holders with legal statuses not mentioned in B.2
- Individuals holding units in demat format need to visit their broker account to view investments.
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4] I am not receiving the OTP

- The OTP is sent to the contact information registered in your folio and is delivered through Email, SMS, and WhatsApp.
- If you do not receive the OTP, you can utilize the OTP re-send feature.
- If you had submitted a declaration during folio creation, you would receive the OTP on WhatsApp.
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C] Lumpsum

1] How can I make additional purchases?

- Visit the transaction website at https://invest.edelweissmf.com/ and login.
- Go to ‘Transact Now’ and select Start Lumpsum.
- Select scheme and enter amount.
- Make payment using net-banking, UPI, or NEFT/RTGS/IMPS.
- Bank details to transfer funds are
  Beneficiary Name: **Edelweiss Mutual Fund - Collection Pool A/c**
  Bank Name: **CITI**
  Bank Account Type: **Current**
  Account Number: **36700017**
  IFSC Code: **CITI0100000**
- You will receive notifications through your registered contact details in folio via Email, SMS, and WhatsApp.
- View screen recording.
- Back to Index.

2] Can I change folio?

- Yes, you can change or create a new folio for additional purchases.
- Visit "Transact Now" and click "Lumpsum."
- The default folio is pre-selected, and you'll see a "Change Folio" link next to it.
- View screen recording.
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3] How can I see the status of my transaction?

- Visit the transaction website at https://invest.edelweissmf.com/ and login.
- Go to ‘Transactions’, you will see pending and in process transactions under ‘Pending’ section while transactions where unit allotment is completed will appear under ‘Processed’ section.
- You can additionally download Statement of Accounts from ‘Reports’ section.
- View screen recording.
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D] SIP

1] How can I register SIP?

- Visit the transaction website at https://invest.edelweissmf.com/ and login.
- Go to 'Transact Now' and select Start SIP.
- Select scheme and enter amount.
- Select existing mandate and submit the SIP OR register new mandate OR generate biller URN No. and register in your bank.
- You will receive notifications through your registered contact details in folio via Email, SMS, and WhatsApp.
- View screen recording.
- Back to Index.

2] How can select / change SIP start date, frequency, and tenure?

- Initiate SIP registration as outlined in D.1
- Choose the scheme and input the amount.
- Look for a blue ribbon with an edit pen icon. In this section, you can modify the SIP start date, frequency, and tenure.
- View screen recording.
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3] What does the SIP Top-Up feature entail, and how can it be accessed?

- Initiate SIP registration as outlined in D.1
- Choose the scheme and input the amount.
- To add Top-Up in SIP, select the checkbox and provide the necessary information.
- Then, proceed to submit the SIP, using either an existing mandate, registering a new e-mandate, or generating a biller URN No.
- View screen recording.
- Back to Index.

4] How can I see my SIPs?

- Visit the transaction website at https://invest.edelweissmf.com/ and login.
- Navigate to the 'Systematic Plans' section.
- You will find a list of your active SIPs associated with your PAN.
- Click on the three dots located on the right side and select 'View Details' to access the SIP-specific information.
- To view the list of inactive SIPs, use the top-right dropdown menu.
- View screen recording.
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5] How can I modify my active SIP?

- Visit the transaction website at https://invest.edelweissmf.com/ and login.
- Navigate to the 'Systematic Plans' section.
- You will find a list of your active SIPs associated with your PAN.
- Click on the three dots located on the right side and select 'Modify SIP'.
- Authenticate with OTP.
- You will be redirected to the SIP page with pre-filled details of your existing SIP. It is necessary to modify at least one field, after which you can proceed to submit the SIP using the existing mandate.
- View screen recording.
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6] How can I Pause / Cancel SIP?

- Visit the transaction website at https://invest.edelweissmf.com/ and login.
- Navigate to the 'Systematic Plans' section.
- You will find a list of your active SIPs associated with your PAN.
- Click on the three dots located on the right side and select Pause or Cancel SIP.
- Authenticate with OTP and submit the transaction.
- View screen recording.
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E] Redemption

1] How can I redeem my account?

- Visit the transaction website at https://invest.edelweissmf.com/ and login.
- Navigate to the 'Transaction Now' section and choose 'Redeem'.
- Select the scheme, and the available balance in your folio will be displayed.
- Choose the redemption type.
- By default, a bank will be pre-selected, but you can change it from the dropdown menu.
- Authenticate the transaction using OTP and proceed to submit it.
- The funds will be disbursed in accordance with the specified timelines.
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F] Othe transactions

1] What other transactions can be done online?

- You can do switch, STP, SWP and insta redemption transactions.
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2] I am not able to do the STP?

- Kindly check the balance available in the source scheme. Min. 25,000 are required to initiate STP.
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G] Portfolio & Reports

1] How can I check my portfolio?

- Visit the transaction website at https://invest.edelweissmf.com/ and login.
- Navigate to the 'My Portfolio' section. where you can view portfolio allocation categorized by asset class.
- Portfolio allocation is presented for all your folios, and you can choose specific folios from the top-right dropdown menu.
- View screen recording.
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2] How can I get my account statement and capital gain statement?

- Visit the transaction website at https://invest.edelweissmf.com/ and login.
- Navigate to the 'Reports' section. You can access both an Account Statement and a Capital Gain Statement here.
- Statements can be requested for all folios, a single folio, or a combination of folios.
- You can select the desired statement period. The statement will be delivered to your registered email address, with your PAN number serving as the passcode for access.
- Please note that the download statement feature is available exclusively for the selection of a single folio.
- View screen recording.
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H] Service Requests

1] How can I update my profile?

- Visit the transaction website at https://invest.edelweissmf.com/ and login.
- Navigate to the My profile from top-right menu.
- You will find sections to update contact details, FATCA & CRS, Nominee Details, and Bank Details.
- View screen recording.
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