

PREAPPLY IPO

How to use the pre apply IPO feature on Espresso Web

What if we told you, you could apply for IPOs before the start date or even after market hours?
Sounds too good to be true? Well, it's possible. Thanks to Espresso's Pre Apply IPO Feature.

Pre apply IPO Feature allows you to apply for IPOs before the IPO start date or even after market hours.k

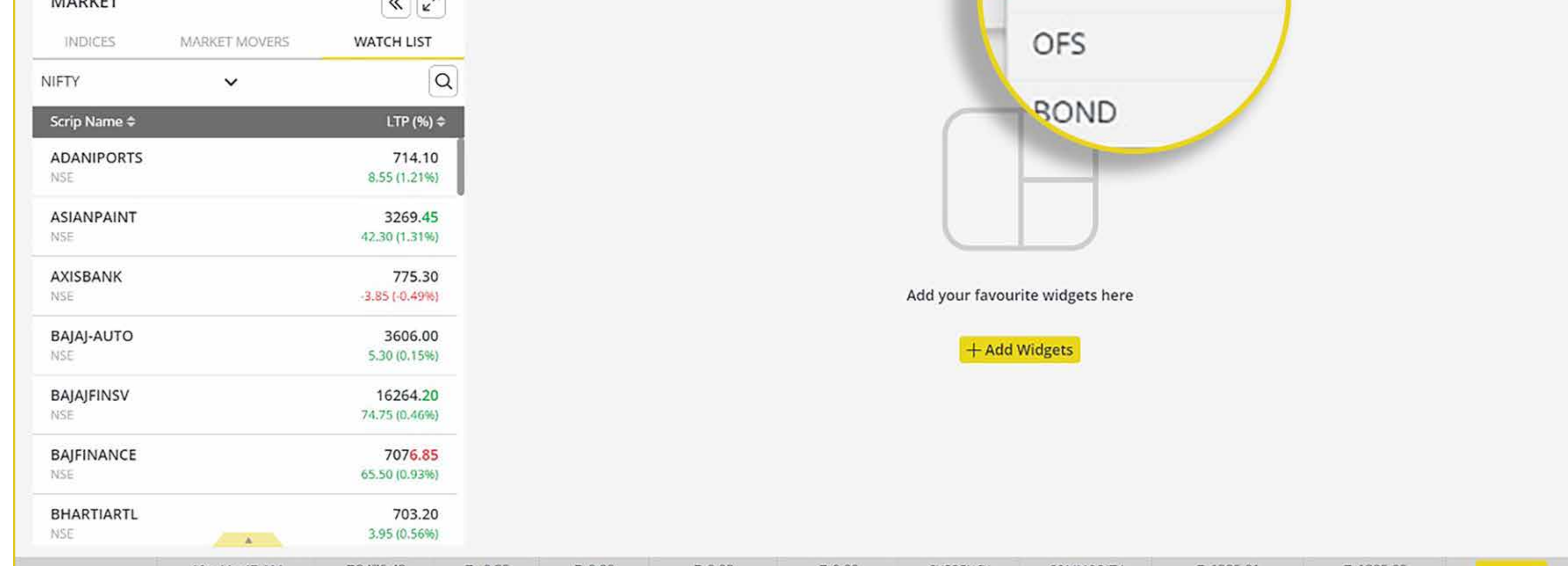
Main benefits of the Pre Apply IPO Feature:

1. You can put in your IPO application before the IPO's actual Open Date
2. You don't have to rush during Market Hours to put in your IPO Application – do it when you have the time!

Points to Remember:

- Pre Apply IPO Feature is available only when the IPO details come in officially to Espresso which is usually 4-5 days prior to IPO Open Date
- Money lying in your Espresso account is **not** blocked for pre-applying for IPOs
- You will need to authorise the UPI mandate that will come on your UPI App to submit your IPO application. This authorization request will come during the IPO period.
- Now that we have covered the what and what not of the feature, let's take a look at how to use the feature on the Sharekhan Website.

Step 1: After you login to Espresso website, click on **E-apply** tab. Under this, click on **IPO**.



Step 2: You will land on **Active IPO screen**. On the Active IPO screen, you will find details like **Start Date, End Date, Quantity per lot, Price Band, Pre-apply date** and so on.

Here is a brief explainer of what these different terms mean:

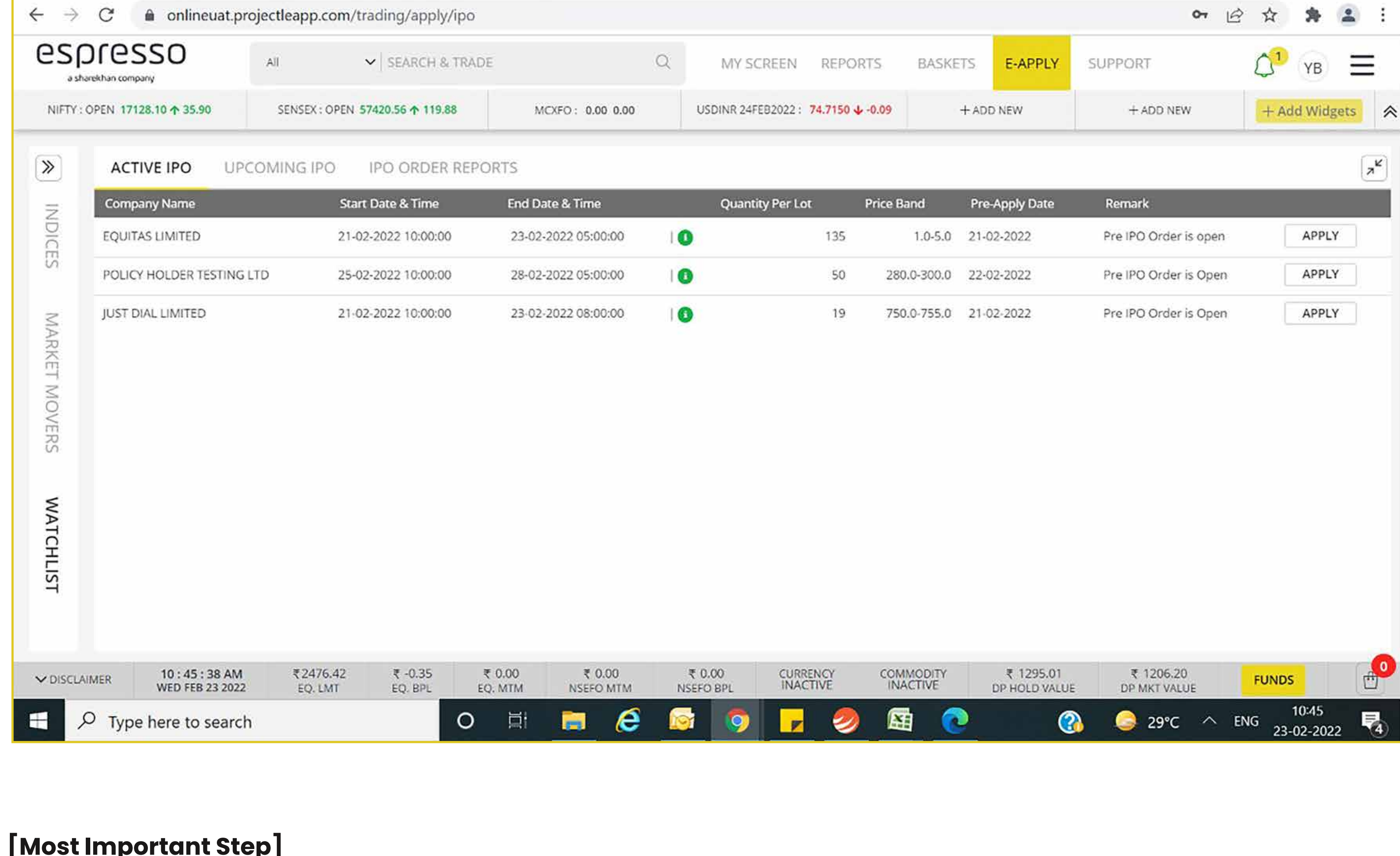
Start Date: Start date is the date on which the IPO opens

End Date: End date is the date on which the IPO closes

Quantity per lot: The quantity offered for bidding in one lot

Price Band: Price offered for bidding

Pre-apply date: The date from which you can apply for IPOs in advance



[Most Important Step]

Step 3: Click on **Apply** button of the screen. After clicking on the Apply button, you will land on the **IPO Application Form**. Once on the IPO Application Form, follow the below steps

- a. Select the Demat Account No from the drop down.
- b. Select the category from the dropdown

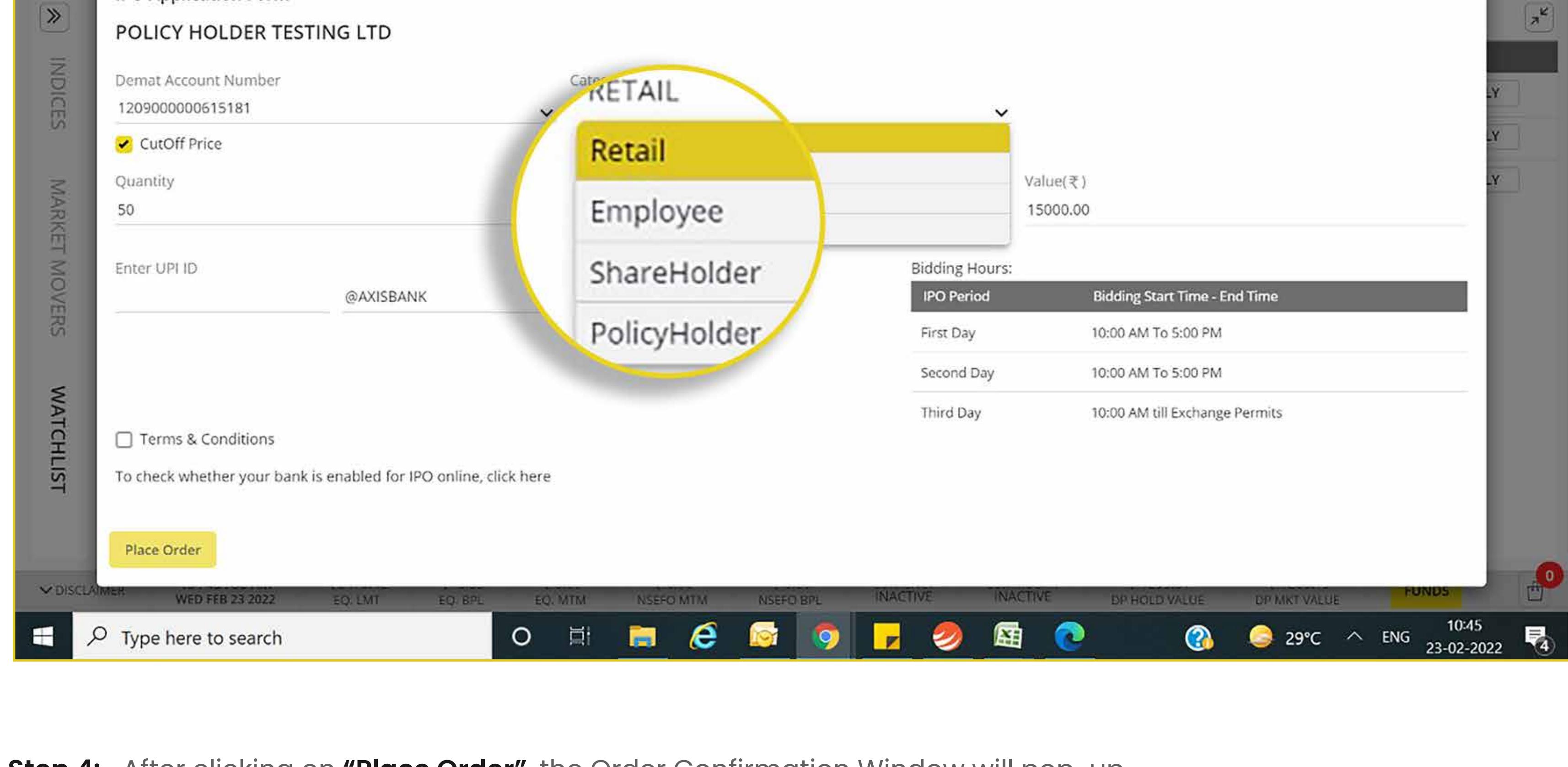
Scenario 1: You are a policyholder of that particular company's products. In such a case, select **"POLICYHOLDER"** from the drop down

Scenario 2: You are an employee of the company. In that case, select **"EMPLOYEE"** from the drop down.

Scenario 3: You are a shareholder of the company. In such a case, select **"SHAREHOLDER"** from the drop down.

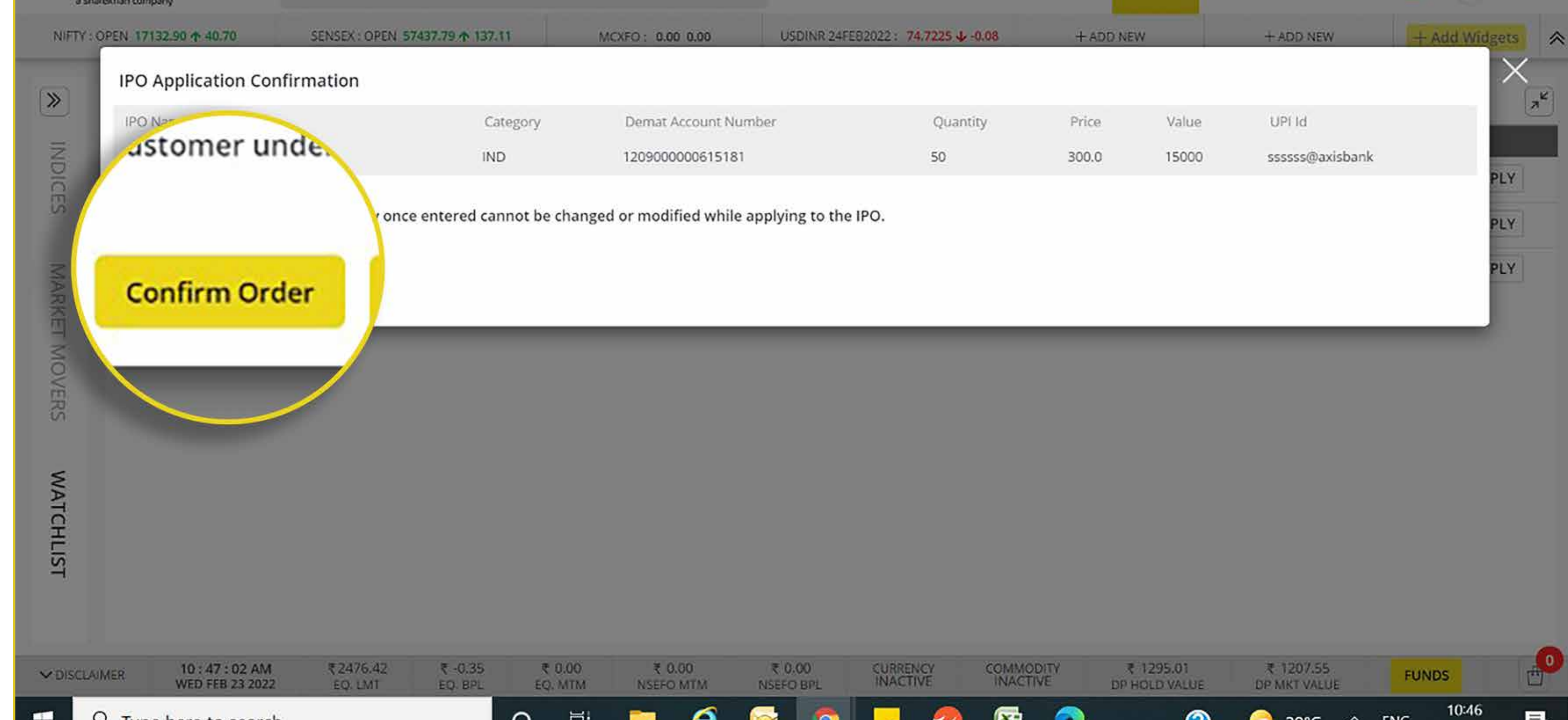
Scenario 4: You do not belong to any of the above categories. Select **"RETAIL"** from the drop down.

- a. The quantity, price cut off and value will be auto filled. You can change the quantity if you wish to apply for more lots
- b. Enter your UPI ID and select the UPI handler from the drop down.
- c. Click the Terms & Conditions checkbox
- d. Finally, click on **"Place Order"**



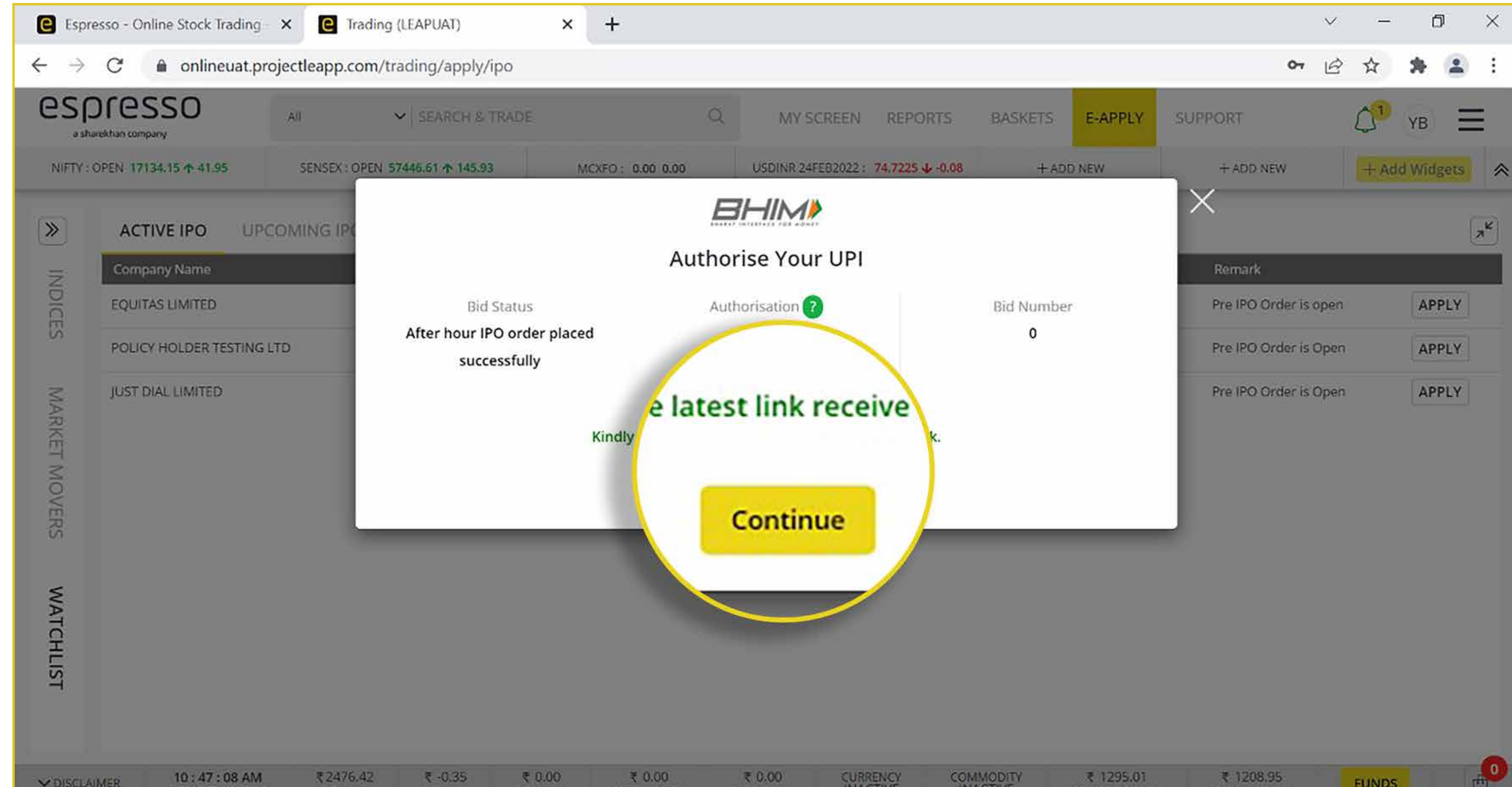
Step 4: After clicking on **"Place Order"**, the Order Confirmation Window will pop-up.

Verify your details and click on **Confirm Order**.



Step 5: Once you click on **"Confirm Order"**, a **"Authorize your UPI"** pop up will be seen.

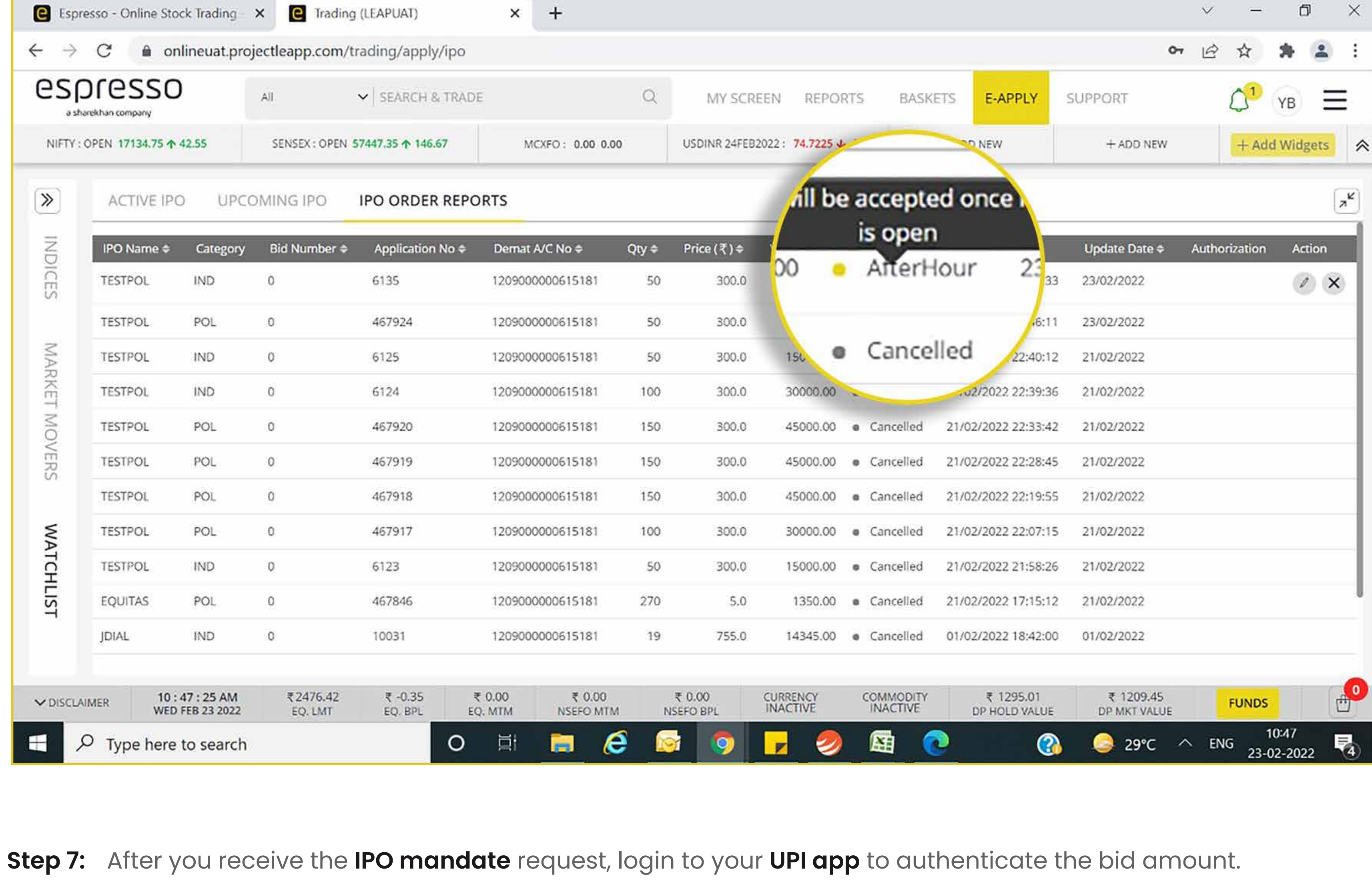
Here you can see the status of the order placed. Click on **"Continue"**.



Step 6: You will be redirected to the IPO screen. Here you can see the **IPO ORDER REPORT**.

Here you will find the Pre Apply IPO order is marked as **"AfterHour"**.

Once the IPO is open for subscription, your order will be sent to the Exchange. Once it is sent to the Exchange, the status will change to **"Bid Received"**. You will receive the IPO mandate request on your UPI app.



Step 7: After you receive the **IPO mandate** request, login to your **UPI app** to authenticate the bid amount.

Accept the request on your UPI app and you will receive the confirmation about the **Block Bid Amount**.

Note: The actual amount will be debited when shares are allotted to you.

IMPORTANT: If you want to watch a video on the above process, please click here: XXXXX

Disclaimer: Opening of account or applying via Pre Apply IPO Feature will not guarantee allotment of shares