

# User Manual

## Research Development and Innovation Fund (RDIF)

***AIF -Alternative Investment Funds  
&  
FOF -Fund of Funds***

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# 1. Introduction

This user manual provides detailed, step-by-step instructions for completing the **Registration process under Preferred Mode of Participation: Contribution** for applicants belonging to **AIF (Alternative Investment Funds)** and **FOF (Fund of Funds)** categories.

## 2. Registration Process

It guides users through entering company details, authorized representative information, completing email and mobile verification, and submitting the registration form successfully. Upon successful registration, the applicant will receive system-generated login credentials for portal access.

**Note:** All fields marked with an asterisk (\*) are mandatory and must be completed before submitting the registration form.

**SLFM Application Portal - Registration**

**Company Details**

**Name of the Applicant Company\***  
Name of the Applicant Company

**Preferred Mode of Participation\***  
-- Select --

**Category of SLFM\***  
-Select Category of SLFM-

**PAN of Entity\***  
Enter PAN of Entity

**GST Number**  
Enter GST number of Entity

**Corporate Office Address\***  
Enter Corporate Office Address

**Registered Office Address\***  
Enter Registered Office Address

**Authorized Representative**

**Name (Applicant)\***  
Enter Name (Applicant)

**Designation\***  
Enter Designation

**Email\***  
Enter Email **Verify Email**

**Phone Number(Landline)**  
Enter Phone Number(Landline)

**Mobile Number\***  
Enter Mobile Number

**Physical Address\***  
Enter Physical Address

**Captcha**  
Enter captcha **Refresh**

**Captcha Image**  
20 + 5

**Submit**

### Company Details

- **Name of the Applicant Company\***: Enter the legal name of the applicant company. Allowed characters include alphabets, numbers, and special characters (-, /, , &, \$, #, \*, parentheses, brackets, commas, apostrophes, spaces). Minimum 3 characters with at least one alphabet.
- **Preferred Mode of Participation\***: Select **Contribution** from the dropdown list.
- **Category of SLFM\***: Select the applicable category (**AIF** or **FOF**) from the dropdown list.

Preferred Mode of Participation \*

Contribution ✓

GST Number:\*

Enter GST number of Entity

Category of SLFM\*

-Select Category of SLFM- ✓

-Select Category of SLFM-

AIF - Alternative Investment Fund

FOF - Fund of Funds

- **PAN of Entity\***: Must be unique.
- **GST Number**: Enter the GST number of the entity. (optional)
- **Corporate Office Address\***: Enter complete corporate office address (maximum 2048 characters).
- **Registered Office Address\***: Enter registered office address. Minimum 6 characters including at least one alphabet. Only alphabets, numbers, hyphen (-), slash (/), comma (,), apostrophe ('), ampersand (&), parentheses, and spaces are allowed.

### Authorized Representative Details

- **Name (Applicant)\***: Enter the authorized representative's name. Alphabets and spaces only, minimum 3 characters.
- **Designation\***: Enter designation. Alphabets, numbers, and allowed special characters (-, /, , (), [], {} ). Minimum 3 characters.
- **Email\***: Enter a valid email address.

Verify Email

Email

hauprejuzossoi-6036@yopmail.com

Enter OTP

Enter OTP

OTP expires in 02:31

Verify OTP

Contribution ✓

AIF - Alternative Investment Fund

Corporate Office Address

Registered Office Address

Mobile Number\*

Physical Address

- Click **Verify OTP** to validate email. Popup confirms verification.



- Click **Get OTP** to generate a 6-character alphanumeric OTP.
  - OTP expires after 3 minutes.
  - Click **Resend OTP** if OTP expires.
- **Phone Number\***: Enter valid landline or phone number with optional country code (+, -) and spaces. Minimum 6, maximum 20 digits.
  - **Mobile Number\***: Enter mobile number with optional country code (+, -) and spaces. Minimum 6, maximum 20 digits.
  - **Physical Address\***: Enter the physical address of the applicant. Minimum 6 characters, at least one alphabet. Allowed characters: alphabets, numbers, hyphen (-), slash (/), comma (,), apostrophe ('), ampersand (&), parentheses, and spaces.
  - **Captcha Verification\***: Perform mathematical operation as asked in captcha image, and enter the value.

### Submission of Registration Form

- Click **Submit** after completing all required fields.
- The system performs all field-level validations.
- If any validation fails, the system highlights the erroneous fields and prompts user to correct them.

The screenshot displays the 'SLFM Application Portal - Registration' form. A green notification bar at the top states: 'Registration successful. Login ID: AIF20260100041. Credentials sent to your email.' A central white popup with a green checkmark icon and the text 'Registration Successful' and 'Registration successful. Login ID: AIF20260100041. Credentials sent to your email.' is overlaid on the form. The form fields include:

- Company Details:** Name of the Applicant Company\* (Contribution AIF and FOF), Preferred Mode of Participation\*, Category of SLFM\* (Alternative Investment Fund), PAN of Entity\* (EVOOF1234H), Registered Office Address\* (Registered Office address).
- Authorized Representative:** Name (Applicant)\* (Applicant AIF and FOF), Landline Number (8998988989), Mobile Number\* (8765463638), Physical Address\* (Test Physical Address).
- Captcha:** A captcha image showing '29 + 2' with the answer '31' entered in the adjacent field.

A 'Submit' button is visible at the bottom of the form.

- Upon successful submission:
  1. Popup message: "Registration successful".

2. Confirmation email sent to contact email with **User Id, Password** and other details.
3. Confirmation email contains all submitted details.

Dear Applicant AIF and FOF,

Your account has been successfully created. Below are your details:

#### **Authorized Person**

- **Name:** Applicant AIF and FOF
- **Designation:** designation of AIF and FOF
- **Email:** contribution.aifandfof@yopmail.com
- **Mobile:** 8765463638
- **Phone:** 8998988989
- **Address:** Test Physical Address

#### **Organization**

- **Company:** Contribution AIF and FOF
- **Category:** AIF -
- **PAN:** EVOOF1234H
- **Company Address:** Corporate AIF address
- **Registered Address:** Registered Office address

#### **Login Credentials**

- **Username:** AIF20260100041
- **Password:** 283122

Please login and change your password immediately.

Regards,  
**Research Development and Innovation Fund**

## 3. User Login Process

This section explains the **login process for users** accessing the application using credentials received via their registered email.

### First-Time Login

- Users will log in using the **User ID and Password** received via their registered email.
- On first-time login, the system **redirects the user to the Change Password page** for security purposes.

The screenshot shows a web form titled "CHANGE PASSWORD" with a dark orange header. The form contains three input fields: "Current Password \*", "New Password \*", and "Confirm Password \*". Each field has a placeholder text "Enter password" and a toggle icon (an eye) to the right. A dark blue "Update Password" button is located at the bottom right of the form. Overlaid on the form is a white modal dialog box. The dialog box features a blue circular icon with a lowercase 'i' inside. Below the icon, the text "Info" is displayed, followed by the message "Please change your password." At the bottom of the dialog is a blue "OK" button.

- Users are required to set a **strong password**.
- Enter the **current password** received via email.
- Set a **new password** following the application's password policy.

#### Password Guidelines

- New password must meet the **strong password criteria** as defined by the application.
- Users are encouraged to use a combination of **upper- and lower-case letters, numbers, and special characters**.
- Confirm the new password.
- Click **Submit** to update the password.
- Once the password is successfully set, the user is **redirected to the login page**.
- The user can now log in using the **new credentials**.

## 4. Application Process For **AIF/ FOF**

This section describes the **Application Process** after successful user login. It explains how users can access their application, navigate through various forms, and complete the required details based on the selected **Preferred Mode of Participation- Contribution** and **Category of SLFM** - AIF - Alternative Investment Fund / FOF – Fund of Funds.

### Accessing the Application

## Login

Username

AIF20260100041

Password

\*\*\*\*\*

Captcha

31

Refresh

Captcha Image

19 + 3

☐ Keep Me logged In

[Forgot Password?](#)

Login

[Don't Have Account? Register Here](#)



- Login via User credential followed by captcha.
- After logging into the application, the user needs to navigate to the **Side Menu Bar**.
- Click on the **Application** menu.
- An application will already be created by the system and will be available in **Draft status**.

## WELCOME TO RDIF APPLICATION

#	Application Number	Application Draft Number	Name of Investee Company/Start Up	Updated On	Status	Action
1		AIF20260100041	Contribution AIF and FOF	11/01/2026	Draft	<a href="#">Show Details</a>

Showing 1 to 1 of 1 entries

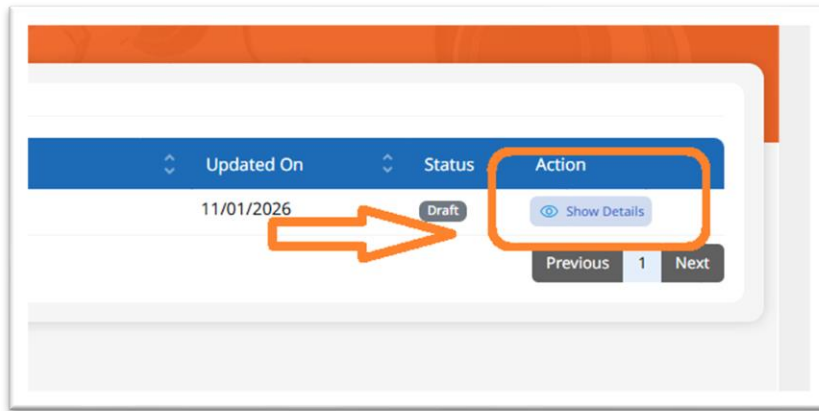
Previous

1

Next

## Viewing Application Details

- In the Application listing, click on the **Action** button.
- Select **Show Details**.
- The application forms will be displayed.



The forms displayed are based on the **Preferred Mode of Participation** and **Category of SLFM** selected during registration.

## Form Navigation and Actions

Each form in the application provides the following action buttons:

- **Previous:** Navigates to the **previous form**.
- **Save:** Saves the entered information **with all validation checks applied**.
- **Next:** Saves the form and navigates to the **next form**.

## Application Structure

For this **Category: AIF / FOF**, the application is structured into two main sections:

1. **Quality Criteria (Including General Information)**
2. **Cost Criteria.**

- a. **Quality Criteria contains Forms [ A1 – A4, B1, B2, B4 - B8, E1 - E3] and Preview Form [ User can also Review/ Edit via Preview Form before Quality Criteria Submission]**
- b. **Cost Criteria contains Forms [ B3 and B9] and Preview Form [User can also Review/ Edit via Preview Form before Cost Criteria Submission]**

## Part A - Quality Criteria (including General Information)

The Quality Criteria section captures organizational strength, governance, experience, and operational capability of the applicant.

### Form A.1 -Modality Request By Applicants: (Read-Only)

Displays the basic details of the applicant captured during the registration process. This form is read-only and helps the applicant verify the information before proceeding further in the application.

Form A.1 - Modality Request By Applicants

Name of the Applicant Company - Contribution AIF and FOF

Preferred Mode of Participation : Contribution

Category : AIF - Alternative Investment Fund

Confirm & Next

- The user cannot edit any fields on this form.
- Details are auto-fetched from the registration module.
- Information shown includes:
  - **Name of the Applicant Company and Preferred Mode of Participation (Common for all Forms)**
  - **Category of SLFM**
- Click on Confirm & Next to proceed to next **Form A.2 - Investment Thesis**

### Form A.2 - Investment Thesis

This documentation requirement is for Applicants seeking funding via either Contribution to AIF or Loan Financing and Captures the applicant's investment thesis and its alignment with the objectives of the scheme. It also allows uploading of relevant supporting documents based on the selected Preferred Mode of Participation.

Form A.2 - Investment Thesis

Name of the Applicant Company - dwada

Preferred Mode of Participation: Long-Term Loans

Fund Name \*

Enter the fund Name if applicable else enter N/A

Type of Fund

Select

Fund Tenure

Fund Tenure years or months

(Note: Remainder Tenure for existing fund and Fund Tenure for New Fund )

Investment Thesis Alignment

S. No	Parameters	Current Fund /Proposed Fund
1	Technological Focus *	Enter fund's technological focus (including any on RDI-intensive technologies)
2	RDIF priority sector focus *	Select Sector Focus
3	Market Focus *	Enter fund's market focus
4	Technology Maturity Ranges(stated in terms of TRLs) * <b>Note:</b> (Applicants are advised to assess Technology Readiness Level (TRL) of investee RDI-intensive Technologies using Office of PSA TRL Assessment Framework. The self-assessment document should be uploaded on portal in this Form A.2.)	Select TRL
5	Venture Development Stage(Laboratory spin-out to production) *	Broadly describe development stage of the Eligible Technology Entities that your fund supports

**Note:** Please enter Technology Focus, Market Focus, Venture Development Stage in the specified field. If the inputs to these fields exceed the field size available, applicant can upload additional submission along with specifying the inputs in their respective fields.

Upload Supporting Documents

Additional/Supporting submissions, if any

Choose File No file chosen

Upload

PDF, DOC, DOCX, XLS, XLSX only | Max upto File Size 50 MB

- **Fund Name:** Needs to enter the Fund Name if applicable else has to enter N/A.
- **Type of Fund:** Select Type of Fund from dropdown list either its **Existing or New**.
- **Fund Tenure:** Enter Remainder tenure for Existing Fund, and complete Fund Tenure for New Fund.

Form A.2 - Investment Thesis

Name of the Applicant Company - Contribution AIF and FOF

Preferred Mode of Participation: Contribution

Fund Name \*

Test New Fund

Type of Fund \*

Select

Select

Existing

New

Fund Tenure \*

12

(Note: Please enter: Remainder Period, if existing fund or Fund Tenure, if new Fund)

Investment Thesis Alignment

S. No	Parameters	Current Fund /Proposed Fund
1	Technological Focus *	
2	RDIF priority sector focus *	Select Sector Focus

- **Table A.2: Investment Thesis Alignment**

The applicant provides details explaining how the current fund or proposed fund aligns with the investment objectives.

Investment Thesis Alignment

S. No	Parameters	Current Fund /Proposed Fund
1	Technological Focus *	Enter fund's technological focus (including any on RDI-intensive technologies)
2	RDIF priority sector focus *	Select Sector Focus ▾
3	Market Focus *	Market Focus
4	Technology Maturity Ranges(stated in terms of TRLs) * <b>Note:</b> (Applicants are advised to assess Technology Readiness Level (TRL) of investee RDI-intensive Technologies using Office of PSA TRL Assessment Framework. The self-assessment document should be uploaded on portal in this Form A.2.)	Select TRL ▾
5	Venture Development Stage(Laboratory spin-out to production) *	

Upload Supporting Documents

Additional/Supporting submissions, if any ▾

Choose file
No file chosen
Upload

PDF, DOC, DOCX, XLS, XLSX only | Max File Size 50 MB

Uploaded Documents

S. No	Document Type	File Name	Action
-------	---------------	-----------	--------

Previous
Save
Next

- **Technological Focus \***: Enter fund technological focus (including any on RDI-intensive technologies)
- **RDIF priority sector focus \***: Multi-select Dropdown

Select Sector Focus ▾

☐ Energy & Climate Action
☐ Deep Technologies (Quantum, Robotics, Space)
☐ Artificial Intelligence & Applications
☐ Biotechnology, Pharma, Medical Devices
☐ Digital Economy / Agriculture
☐ Others

- **Market Focus \***: Enter Fund's Market Focus
- **Technology Maturity Ranges (stated in terms of TRLs) \***: Multi-select dropdown.



TRL 5, TRL 6 +1 ▼

- ☐ TRL 4
- ☒ TRL 5
- ☒ TRL 6
- ☒ TRL 7
- ☐ TRL 8
- ☐ TRL 9

**Note:** (Applicants are advised to assess Technology Readiness Level (TRL) of investee RDI-intensive Technologies using Office of PSA TRL Assessment Framework. The self-assessment document should be uploaded on portal in this Form A.2.)

- **Venture Development Stage(Laboratory spin-out to production) \*:** Broadly describe development stage of the Eligible Technology Entities that your fund supports

## Upload Supporting Documents

Upload Supporting Documents

Additional/Supporting submissions, if any ▼

Choose file No file chosen Upload

PDF, DOC, DOCX, XLS, XLSX only | Max File Size 50 MB

Private Placement Memorandum document as submitted to SEBI

Written statements, latest annual report.

S. No	Document Type	File Name	Action
-------	---------------	-----------	--------

Previous Save Next

- **Additional Supporting Submissions (Optional)**  
Any other relevant documents may be uploaded.
- Supported formats: PDF, DOC, DOCX, XLS, XLSX  
Maximum file size: 50 MB per file.
- Click on Upload button to add Supporting Documents.
- User has access to **View/Delete** Documents from Uploaded Documents Data Table in all Forms.

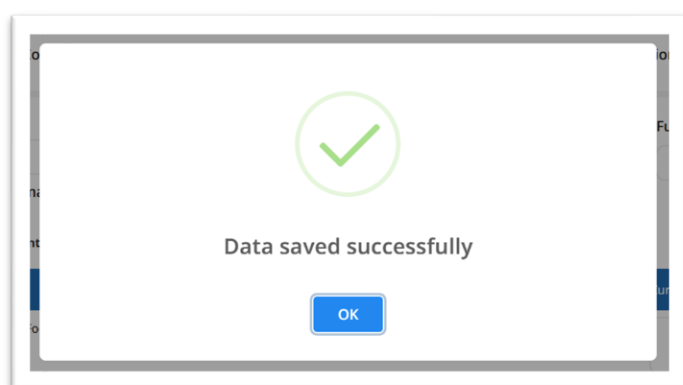
PDF, DOC, DOCX, XLS, XLSX only | Max File Size 50 MB

### Uploaded Documents

S. No	Document Type	File Name	Action
1	Additional/Supporting submissions, if any	1768157888_Annexure-A3 (2).pdf	<a href="#">View</a> <a href="#">Delete</a>

Previous Save Next

- Click on **Save** button to save Form, the system performs all field-level validations and confirmation will be displayed. If any validation fails, the system highlights the erroneous fields and prompts user to correct them.



- Click on the **Next** button to continue with the application process.

## Form A.3: Undertakings Required for Company Secretary or person authorised by the Board of the Applicant entity, to sign and submit the application on its behalf

**From this Form onwards, common fields are auto-populated based on the Registration and Form A2**

- Name of the Applicant Company,
- Preferred Mode of Participation,
- Category
- Fund Type

This documentation requirement is for Applicants seeking funding via either Contribution to AIF or Loan Financing.

Form A.3: Undertakings Required for Company Secretary or person authorised by the Board of the Applicant entity, to sign and submit the application on its behalf

Name of the Applicant Company - dwada

Preferred Mode of Participation : Long-Term Loans

Category : DFI - Development Financial Institution

Fund Type : N/A

Download Annexure

#	Annexure Details	Action
1	Annexure A.3: Undertakings Required for Company Secretary or person authorised by the Board of the Applicant entity, to sign and submit the application on its behalf	Download

Upload Supporting Documents

Additional/Supporting submissions, if any

Choose File No file chosen

Upload

PDF, DOC, DOCX, XLS, XLXS only | Max upto File Size 50 MB

Uploaded Documents

S. No	Document Type	File Name	Action
-------	---------------	-----------	--------

Declaration

☐ I hereby confirm that I have submitted all the required documents \*

Previous

Save

Next

- Annexure A.3: Undertakings Required for Company Secretary or person authorised by the Board of the Applicant entity, to sign and submit the application on its behalf**  
The applicant must download, complete, and upload the prescribed annexure.
- Download**  
Click to download the official PDF format of Annexure A.3.

Action

Download

m of Association. Company Secretary is required to certify the copy.)

Choose file No file chosen

Upload

DOC, DOCX, XLS, XLXS only | Max File Size 50 MB

- Upload**  
Upload the duly filled and signed Annexure A.3 document and Allows uploading of additional supporting documents.

- **Upload Supporting Documents (Optional)**

Additional related documents may be uploaded, if required.

- **Supported formats:** PDF, DOC, DOCX, XLS, XLSX

**Maximum file size:** 50 MB per file

- Check on **Declaration** the applicant must confirm submission of all selected documents by selecting the declaration checkbox.
- Click on the **Save** button to save Form.
- Click on the **Next** button to continue with the application process.

## Form A.4 – Conflict of Interest:

This documentation requirement is for Applicants seeking funding via either Contribution to AIF or Loan Financing and Captures the applicant's declaration regarding any existing or potential **Conflict of Interest**

**Form A.4: Conflict of Interest**

Name of the Applicant Company - dwada  
 Category : DFI - Development Financial Institution

Preferred Mode of Participation : Long-Term Loans  
 Fund Type : N/A

**Download Annexure**

#	Annexure Details	Action
1	Annexure A.4: Conflict of Interest	<a href="#">Download</a>

**Upload Supporting Documents**

Additional/Supporting submissions, if any ▼ Choose File No file chosen Upload

PDF, DOC, DOCX, XLS, XLSX only | Max upto File Size 50 MB

**Uploaded Documents**

S. No	Document Type	File Name	Action
-------	---------------	-----------	--------

Previous Save Next

### Annexure A.4: Conflict of Interest

The applicant must download, complete, and upload the prescribed annexure.

- **Download**

Click the **Download** button to download the PDF format of **Annexure A.4: Conflict of Interest**.

- **Upload**

Upload the duly filled and signed Annexure A.4 document and Allows uploading of additional supporting documents.

- **Upload Supporting Documents**

Additional related documents may be uploaded, if required.

- **Supported formats:** PDF, DOC, DOCX, XLS, XLSX

**Maximum file size:** 50 MB per file

- Click on the **Save** button to save Form.
- Click on the **Next** button to continue with the application process.

## Form B.1– Eligibility Requirements for AIFs: Documentation Requirements

Collects documentation to verify that the applicant meets the **eligibility requirements for AIFs**. It ensures that the fund, its managers, and trustees comply with SEBI regulations and that all required undertakings are submitted.

Below list of documents is indicative. Prospective eligible SLFMs can submit available documents supporting their eligibility, and their submissions for quality and cost criteria evaluation under QCBS.

Form B.1: Eligibility Requirements for AIFs: Documentation Requirements

Name of the Applicant Company : Contribution AIF and FOF

Preferred Mode of Participation : Contribution

Category : AIF - Alternative Investment Fund

Fund Type : New

Select

#

Checklist Item

☐

1

Certificate of Registration  
(For the fund seeking RDIF contribution, upload Certificate of Registration from the Securities and Exchange Board of India (SEBI) under Regulation 6 of SEBI (Alternative Investment Funds) Regulations, 2012)

☐

2

Names and details of Trustees, if the Fund corpus has been established as a Scheme of a Trust

☐

3

Names and details of Directors, with DIN for the Investment Manager / Asset Management Company, or LLP \*

☐

4

GST Registration Certificate and PAN Card for the Investment Manager / Asset Management Company, or LLP \*

☐

5

Undertaking that the Applicant has no conflict of interest regarding RDIF decision-making \*

☐

6

Private Placement Memorandum of Fund submitted to SEBI \*

☐

7

Details on funds raised so far, supported by signed Contribution Agreements  
If any contribution has been raised so far, this is mandatory. In the event, no fund has been raised so far, an undertaking may be uploaded To be treated as commercial confidence under Section 8[1][d] of the Right to Information Act 2005.

Note:

1. Please upload the documents listed in the form in the 'Upload Supporting Documents' section below.

2. Once uploaded, Applicants are requested to select the corresponding checkbox.

3. Kindly note that, out of 7 forms, 5 are mandatory.

- Certificate of Registration is mandatory for funds already registered with SEBI.

- AIFs applied to SEBI and are yet to receive a Registration Certificate should submit the proof of application.

4. Applicants can also upload other supporting/ additional documents.

### Upload Supporting Documents

Additional/Supporting submissions, if any

Choose file
No file chosen

Upload

PDF, DOC, DOCX, XLS, XLSX only | Max File Size 50 MB

### Uploaded Documents

S. No	Document Type	File Name	Action
1	Names and details of Trustees, if the Fund corpus has been establis...	1768157906_Annexure-A3 (2).pdf	<a href="#">View</a> <a href="#">Delete</a>

### Declaration

☒ I hereby confirm that I have submitted all the selected documents \*

Previous

Save

Next

### Note:

1. Please upload the documents listed in the form in the 'Upload Supporting Documents' section below.
2. Once uploaded, Applicants are requested to select the corresponding checkbox.
3. Kindly note that, out of 7 forms, 5 are mandatory.
  - Certificate of Registration is mandatory for funds already registered with SEBI.
  - AIFs applied to SEBI and are yet to receive a Registration Certificate should submit the proof of application.
4. Applicants can also upload other supporting/ additional documents.

### Upload Supporting Documents

1. **Certificate of Registration**
2. **Names and details of Trustees**
3. **Names and details of Directors**
4. **GST Registration Certificate and PAN Card**
5. **Undertaking for No Conflict of Interest**
6. **Private Placement Memorandum**
7. **Details on Funds Raised So Far**

- **Upload**  
Allows uploading of supporting documents.
- **Upload Supporting Documents**  
Additional related documents may be uploaded, if required.
- **Supported formats:** PDF, DOC, DOCX, XLS, XLSX  
**Maximum file size:** 50 MB per file

- **Declaration**

Checkbox where the applicant confirms:

*"I hereby confirm that I have submitted all the selected documents."*

- Click on the **Save** button to save Form
- Click on the **Next** button to continue with the application process.

## Form B.2 – Quality Criteria for AIFs: Documentation Requirements

Collects documentation to assess the applicant's **quality criteria** for Alternative Investment Funds (AIFs). It allows the user to submit supporting documents for specific evaluation parameters as defined in the system.

Form B.2: Quality Criteria for AIFs: Documentation Requirements

Name of the Applicant Company - Contribution AIF and FOF  
Category : AIF - Alternative Investment Fund

Preferred Mode of Participation : Contribution  
Fund Type : New

Checklist

Select	SNo	Evaluation Criteria	Description	Nature of Submission
<input type="checkbox"/>	1.	Fund Management Team Competence	Qualifications, experience, and capabilities of Fund Management Team in managing investments and operational risks in investees (independent of whether or not the SLFM had a prior focus in R&D)	1. Uploads in this Form B.2
<input type="checkbox"/>	2.	Demonstrated Track Record of Investment Management Competence#	Track record of success and consistency in delivering prior funds, through repeatable processes, robust execution, and effective risk management.	1. Fill Form B.6A and B.6B. 2. Additional supporting uploads (if any) in this Form B.2
<input type="checkbox"/>	3.	Investment Thesis Alignment with RDIF Investment Policy	Extent to which investment thesis aligns with RDIF's objectives, as outlined in the RDIF Investment Policy.	1. Fill Form A.2, with supporting documents upload (as specified). 2. Additional supporting uploads (if any) in this Form B.2/ B.5
<input type="checkbox"/>	4.	Track Record in R&D Scale Up and Competence in RDI-intensive technologies#	Competence with the high-uncertainty investments characterising RDI-intensive technologies at the TRLs concerned.	1. Fill Form B.7A for investments, and B.7B for exits. 2. Uploads in this Form B.2
<input type="checkbox"/>	5.	Track Record in Investment Sizes for R&D Scale Up#	Competence with the size of investments needed to scale-up R&D.	1. Fill Form B.8. 2. Additional supporting uploads (if any) in this Form B.2
<input type="checkbox"/>	6.	Absorption and Utilisation Capacity#	SLFM's ability to effectively invest capital contributions received.	1. Fill Form B.6A. 2. Uploads (if any) in this Form B.2
<input type="checkbox"/>	7.	Crowd-In	Percentage of aggregate capital contributed by private sources, at Close for which contribution is being sought from RDIF (for AIFs)	1. Fill Form B.5 2. Supporting uploads in this Form B.2

**Note:**  
1. Applicants are advised to refer to 'NIA Forms and Documents' file uploaded on the portal. Annexure B.2 lists down indicative documents required against each evaluation criteria.  
2. Applicants are advised to select the check box, followed by navigating to the drop down to upload documents.  
3. Applicants can also upload other supporting/ additional documents.

### Note:

1. Applicants are advised to refer to 'NIA Forms and Documents' file uploaded on the portal. Annexure B.2 lists down indicative documents required against each evaluation criteria.
2. Applicants are advised to select the check box, followed by navigating to the drop down to upload documents.
3. Applicants can also upload other supporting/ additional documents.

**Upload Supporting Documents**

Additional/Supporting submissions, if any ▼ Choose file No file chosen Upload

PDF, DOC, DOCX, XLS, XLSX only | Max File Size 50 MB

**Uploaded Documents**

S. No	Document Type	File Name	Action
-------	---------------	-----------	--------

**Declaration**

☐ I hereby confirm that I have submitted all the selected documents

**Note:**

- \*: To be treated as commercial confidence under Section 8[1][d] of the Right to Information Act 2005.
- #: If only one or no prior Fund has been launched previous to this one, as Schemes of the current Trust / with the current management team: details may be provided for previous funds with which individual Partners were earlier associated.

Previous Save Next

### Note:

\*: To be treated as commercial confidence under Section 8[1][d] of the Right to Information Act 2005.

#: If only one or no prior Fund has been launched previous to this one, as Schemes of the current Trust / with the current management team: details may be provided for previous funds with which individual Partners were earlier associated.

- **Upload Supporting Documents Documents**

Applicant should select the Evaluation Criteria checkbox to see document requirement against the criteria in the Dropdown under Upload Supporting Documents Section criterion.

### Upload Supporting Documents

- **Upload**

Allows uploading of supporting documents.

- **Upload Supporting Documents**

Additional related documents may be uploaded, if required.

- **Supported formats:** PDF, DOC, DOCX, XLS, XLSX

**Maximum file size:** 50 MB per file

- **Declaration**

Checkbox where the applicant confirms:

*"I hereby confirm that I have submitted all the selected documents."*

- Click on the **Save** button to save Form

- Click on the **Next** button to continue with the application process.

## Form B.4 – Inputs on Funding Modes for AIFs

Captures details about the **preferred funding mode**,



**Form B.4: Inputs on Funding Modes for AIFs**

**Name of the Applicant Company - Contribution AIF and FOF**  
**Category :** AIF - Alternative Investment Fund

**Preferred Mode of Participation :** Contribution  
**Fund Type :** New

**Fund Type \*** New **Preferred Funding Mode \*** Select **Fund Name \*** N/A **Internal Rate of Return (IRR) offered \*** e.g. 10.5%

**Distribution Priority for RDIF \*** Select **Fund Tenure (Years)\*** Years

**Upload Supporting Documents**

Additional/Supporting submissions, if any  No file chosen

PDF, DOC, DOCK, XLS, XLXS only | Max File Size 50 MB

**Uploaded Documents**

S. No	Document Type	File Name	Action
-------	---------------	-----------	--------

**Note: Fund Type and Fund Name:** Auto fetched from A2 Form

- **Preferred Funding Mode:** Dropdown (Mode 1 / Mode 2 / Mode 3 )
- **Distribution Priority for RDIF:** Auto-populated based on selected mode
  - Mode 1 → Higher
  - Mode 2 → Pari-passu
  - Mode 3 → Lower

**Fund Type \*** New **Preferred Funding Mode \*** Mode 1 **Fund Name \*** N/A

**Distribution Priority for RDIF \*** Higher **Please specify Higher priority \*** **Fund Tenure (Years)\*** Years

**Uploaded Documents**

PDF, DOC, DOCK, XLS, XLXS only | Max File Size 50 MB

- **Specify Higher Priority:** Textbox displayed if Mode 1 selected.
- **Specify Lower Priority:** Textbox displayed if Mode 3 selected.
- **Fund Tenure (Years):** Textbox for alphanumeric values.

## Upload Supporting Documents

- **Upload**  
Allows uploading of supporting documents.
- **Upload Supporting Documents**  
Additional related documents may be uploaded, if required.
- **Supported formats:** PDF, DOC, DOCX, XLS, XLSX  
**Maximum file size:** 50 MB per file
- Click on the **Save** button to save Form
- Click on the **Next** button to continue with the application process

## Form B.5 – Contribution Quantum for AIFs

Captures details about the **contribution quantum** for AIFs, including technology and sector focus, target values, RDIF contribution, and supporting documents.

Form B.5: Contribution Quantum for AIFs

Name of the Applicant Company - AIF Company Name

Preferred Mode of Participation : Contribution

Category : AIF - Alternative Investment Fund

Fund Type : Existing

Technology Focus : \*

Target Value for First Close : \*

Target Value for Final Close : \*

'Crowd In': Private Contribution being provided (Targeted) as % of Aggregate Capital : \*

RDIF Contribution Sought (INR) : \*

RDIF Contribution sought as % of Aggregate Capital : \*

Note:

1. If applicant wish to edit Technology Focus details, please edit in form A.2

Upload Supporting Documents

Additional/Supporting submissions, if any

Choose File

No file chosen

Upload

PDF, DOC, DOCX, XLS, XLSX only | Max upto File Size 50 MB

Uploaded Documents

S. No	Document Type	File Name	Action
1	Investment Thesis OR Equivalent section of Private Placement Memorandum document as submitted to SEBI These are indicative supporting documents required. Applicants are permitted to provide additional supporting documentation to verify details	1769143387_Annexure-A3 (8).pdf	<a href="#">View</a> <a href="#">Delete</a>

Previous

Save

Next

**Note:** Technology Focus will be Auto-populated based on **A2 Form**,

- **Technology Focus:** Auto-populated (from A.2) and cannot be edited here.

- **Target Value for First Close**
- **Target Value for Final Close**
- **'Crowd In' – Private Contribution**
- **RDIF Contribution Sought (INR):** Textbox. *Mandatory*, numeric with decimals
- **RDIF Contribution as % of Aggregate Capital:** Textbox, alphanumeric

### Upload Supporting Documents

- **Upload**  
Allows uploading of supporting documents.
- **Upload Supporting Documents**  
Additional related documents may be uploaded, if required.
- **Supported formats:** PDF, DOC, DOCX, XLS, XLSX  
**Maximum file size:** 50 MB per file
- **Delete - Functionalities** – Each fund column has a delete button.
  - Click triggers a confirmation dialog: *“Are you sure you want to delete the fund [Column Name]?”*
  - **Yes** – Deletes the fund column.
  - **No** – No changes applied.
- Click on the **Save** button to save Form
- Click on the **Next** button to continue with the application process.

## Form B.6 Part A – Investment Management Competence Track Record of AIFs

Captures the applicant's **investment management track record**, including portfolio performance, fund IRR, yields, tenure, and historical data for past funds managed.

## Form B.6 : Investment Management Competence Track Record of AIFs(A)

Name of the Applicant Company - Contribution AIF and FOF

Preferred Mode of Participation : Contribution

Category : AIF - Alternative Investment Fund

Fund Type : New

Fund Name : \*

Enter Fund Name

Net Internal Rate of Return (IRR) : \*

Enter Net Internal Rate of Return (IRR)

Multiple on Invested Capital (MOIC) :

Enter Multiple on Invested Capital (MOIC)

Distributions to Paid-In Capital (DPIC) :

Enter Distributions to Paid-In Capital (DPIC)

Yield on Loans or Portfolio Yield (For Debt AIFs) :

Enter Yield on Loans or Portfolio Yield (For Debt AIFs)

Vintage Year Performance (AIF's performance against other funds in the same First Close year) :

Enter Vintage Year Performance

Default Rates or Non-Accrual Loans (For Debt AIFs) :

Enter Default Rates or Non-Accrual Loans (For Debt AIFs)

Date of First Close : \*

dd-mm-yyyy

Date on which Distribution occurred : \*

dd-mm-yyyy

Fund Tenure : \*

Enter Fund Tenure

Average Value of Investments : \*

Enter Average Value of Investments

Modal Value of Investments : \*

Enter Modal Value of Investments

Absorption Capacity : \*

Enter Absorption Capacity

Utilisation Capacity : \*

Enter Utilisation Capacity

Existing Loan/ equity schemes managed (if any) :

Enter Existing Loan/ equity schemes managed (if any)

Reset

Add Fund

- **Fund Name \*** – Enter Fund Name (Will be auto fetched on B6 Part B)
- **Net Internal Rate of Return (IRR) \*** – Textbox, alphanumeric with % allowed.
- **Multiple on Invested Capital (MOIC)** – Textbox, alphanumeric with % allowed.
- **Distributions to Paid-In Capital (DPIC) \*** – Textbox, alphanumeric with % allowed.
- **Yield on Loans / Portfolio Yield (Debt AIFs)** – Textbox, alphanumeric with % allowed.
- **Vintage Year Performance** – Textbox, alphanumeric.
- **Default Rates / Non-Accrual Loans (Debt AIFs)** – Textbox, alphanumeric with % allowed.
- **Date of First Close \*** – Date picker, format dd/mm/yyyy.
- **Date on which Distribution Occurred \*** – Date picker, format dd/mm/yyyy.
- **Fund Tenure \*** – Textbox, alphanumeric.
- **Average Value of Investments \*** – Textbox, alphanumeric.
- **Modal Value of Investments \*** – Textbox, alphanumeric.
- **Absorption Capacity \*** – Textbox, with % allowed.
- **Utilisation Capacity \*** – Textbox, alphanumeric with % allowed.
- **Existing Loan/Equity Schemes Managed** – Text area, alphanumeric with % allowed.
- **Add Fund** – Button to add a fund to **List B.6 Part A** table. Applicants can add Previous Fund details by using Add Fund. All the funds will be displayed as list B.6 Part A on the Portal (mentioned below)

### List B.6 Part

**Part A: Portfolio Summary**

Show 10 entries

Search:

#	Fund Name	IRR	MOIC	DPIC	Date of First Close	Date on Distribution occurred	Fund Tenure	Average Value of Investments	Modal Value of Investments	A
1	Fund 1 (test)	12			2026-01-13	2026-01-28	12	12	12	12
2	Fund 2 (test 3)	17			2026-01-02	2026-01-22	16	4	1	1
3	Fund 3 (new2)	12.34%	82.34%	12.84%	2026-01-13	2026-01-28	12	12	12.82%..	12

Showing 1 to 3 of 3 entries

Previous 1 Next

Previous Save Next

The Portfolio Summary table lists all added funds and allows users to **View, Edit, or Delete** each fund.

- **Edit** - User can edit existing Fund details
- **Delete** - Functionalities – Each fund column has a delete button.
  1. Click triggers a confirmation dialog: *“Are you sure you want to delete the fund [Column Name]?”*
  2. **Yes** – Deletes the fund column.
  3. **No** – No changes applied.
- Click on the **Save** button to save Form
- Click on the **Next** button to continue with the application process.

## Form B.6 Part B – Entry & Exit Valuations of AIFs

Captures **entry and exit valuations** of companies in the fund portfolio to evaluate historical performance and investment outcomes.

Form B.6 : Investment Management Competence Track Record of AIFs(B)

Name of the Applicant Company - AIF Company Name

Category : AIF - Alternative Investment Fund

Preferred Mode of Participation : Contribution

Fund Type : Existing

Name of Investee Company/Startup \*

Enter Name of Investee Company/Startup

Select Fund \*

--Select--

Entry Valuation \*

Enter Entry Valuation

Exit Valuation \*

Enter Exit Valuation

Notes 1:

1. User is expected to enter fund name in the csv file as shown in the dropdown of the selected fund.

Notes 2:

For FoF SLFM applicants,

1. The field Company Name **can be** read as '**Name of Investee Fund**' (Funds in which FoF has made investments).

2. Add Company Button **can be** read as '**Add Investee Fund**'.

3. For '**Entry Valuation**', and '**Exit Valuation**', please provide unit value at the time of entry, and exit respectively.

Select CSV File\*

Choose File

No file chosen

Download Template

Upload File

Reset

Add Company

Entry and Exit Valuation

#### Notes:

#### For FoF SLFM applicants,

1. The field Company Name **can be** read as '**Name of Investee Fund**' (Funds in which FoF has made investments).
2. Add Company Button **can be** read as '**Add Investee Fund**'.
3. For '**Entry Valuation**', and '**Exit Valuation**', please provide unit value at the time of entry, and exit respectively.

- **Name of Investee Company/Startup \*** – Textbox, alphabets, spaces, dots allowed, minimum 2 characters, title case preferred.
- **Select Fund** – Dropdown. Shows funds List entered in **B.6 Part A**.
- **Entry Valuation** – Textbox, alphanumeric.
- **Exit Valuation** – Textbox, alphanumeric.
- **Add Company** – Button, adds the company to **List B.6 Part B**.

Reset

Add Company

- Click on Add Company button to adds the company to **List B.6 Part B**.

List B.6 Part B - Entry and Exit Valuation

Notes 1:  
1. User is expected to enter fund name in the csv file as shown in the dropdown of the selected fund.

Notes 2:  
For FoF SLFM applicants,  
1. The field Company Name can be read as 'Name of Investee Fund' (Funds in which FoF has made investments).  
2. Add Company Button can be read as 'Add Investee Fund'.  
3. For 'Entry Valuation', and 'Exit Valuation', please provide unit value at the time of entry, and exit respectively.

Reset

Add Company

Select CSV File\*

Choose File

No file chosen

Download Template

Upload File

Entry and Exit Valuation

Show

10

entries

Search:

#	Company Name	Fund Name	Entry Valuation	Exit Valuation	Action
1	sss	Fund 1 (test)	aaak.12	ajaja.ak12	<div><div>View</div><div>Edit</div><div>Delete</div></div>
2	11	Fund 1 (test)	1	2	<div><div>View</div><div>Edit</div><div>Delete</div></div>
3	1	Fund 1 (test)	1	2	<div><div>View</div><div>Edit</div><div>Delete</div></div>

Showing 1 to 3 of 3 entries

Previous

1

Next

How to Upload Entry and Exit Valuation Details via .CSV File

- The applicant must download the .CSV template using the Download Template button.

Select CSV File\*

Choose File

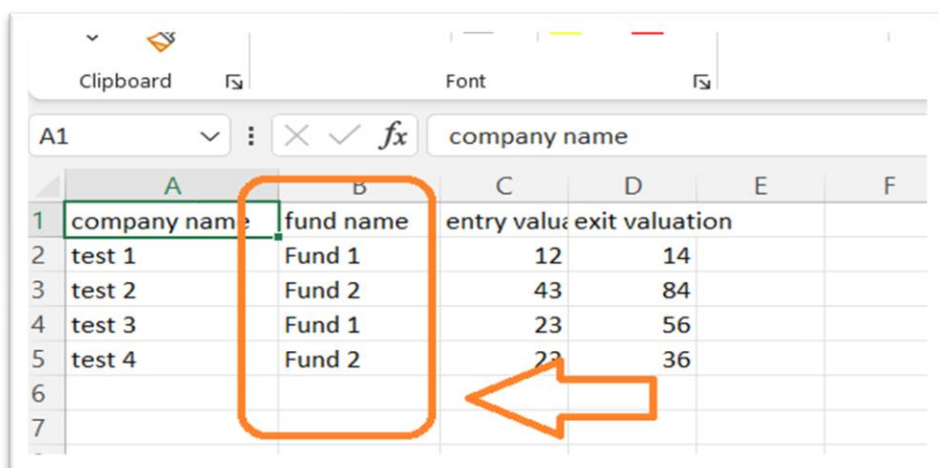
No file chosen

Download Template

Upload File

Entry and Exit Valuation

- The applicant can add multiple fund details in the downloaded template.



	A	B	C	D	E	F
1	company name	fund name	entry value	exit valuation		
2	test 1	Fund 1	12	14		
3	test 2	Fund 2	43	84		
4	test 3	Fund 1	23	56		
5	test 4	Fund 2	23	36		
6						
7						

- The Fund Name entered in the CSV file must exactly match the Fund Name available in the Select Fund Name dropdown.



Select Fund \*

--Select--

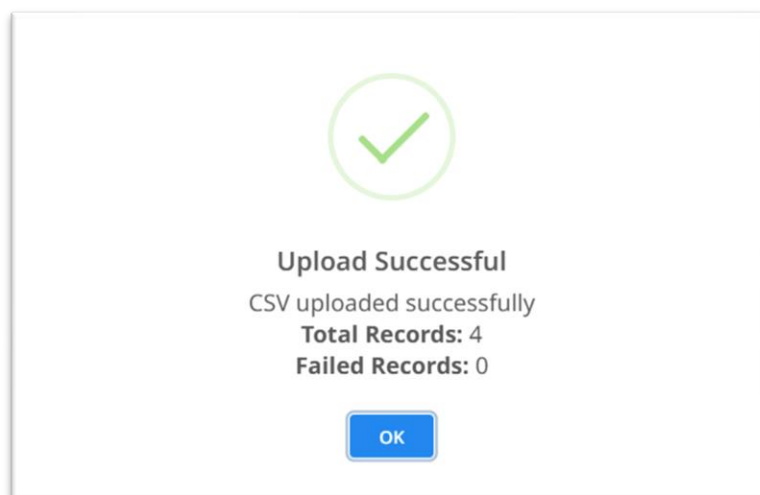
--Select--

Fund 1 (test)

Fund 2 (test 3)

Fund 3 (new2)

- Do not modify the column names or format of the template.
- After uploading the CSV file, the system will display a confirmation message showing passed and failed fund entries.





- All successfully uploaded entries will be added to the Entry and Exit Valuation table.

**Entry and Exit Valuation**

Show 10 entries

Search:

#	Company Name	Fund Name	Entry Valuation	Exit Valuation	Action
1	test 4	Fund 2 (test 3)	23	36	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>
2	test 3	Fund 1 (test)	23	56	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>
3	test 2	Fund 2 (test 3)	43	84	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>
4	test 1	Fund 1 (test)	12	14	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>

Showing 1 of 4 entries

Previous 1 Next

Previous Save Next

- **View** - User can view added Fund.
- **Edit** - User can edit existing Fund details and save using **Update Details** button
- **Delete Company** – Each row has a delete button.
  1. Click triggers a confirmation dialog: *“Are you sure you want to delete the company [Company Name]?”*
  2. **Yes** – Deletes the row.
  3. **No** – No change applied.
- Click on the **Save** button to save Form.
- Click on the **Next** button to continue with the application process.

## Form B.7A – Investments in Companies / Startups Advancing RDI-Intensive Technologies

Captures details of **investments made by the fund** into companies, including startups, that advance **RDI-intensive technologies**.

**Form B.7A: Investment in companies including startups advancing RDI-Intensive Technologies**

**Name of the Applicant Company - AIF Company Name**  
**Category :** AIF - Alternative Investment Fund

**Preferred Mode of Participation :** Contribution  
**Fund Type :** Existing

**Select Fund \***  
Fund 2 (test 3)

**Name of Investee Company/Startup \***  
Enter Name of Investee Company/Startup

**Date of Investment \***  
dd-mm-yyyy

**Size of Investment \***  
Enter Size of Investment

**Notes 1:**  
1. User is expected to enter fund name in the csv file as shown in the dropdown of the selected fund.

**Notes 2:**  
**For FoF SLFM applicants,**  
1. The field name of Investee Company/ Startup can be read as 'Name of Investee Fund' (Funds in which FoF has made investments).  
2. The field 'Select Fund' can be read to as 'Select Investee Funds in which FoF has made investments'.

**Select CSV File\***  
Choose File No file chosen

Download Template Upload File

Reset Add Investment

**Part A: Investment in companies including startups Advancing RDI-Intensive Technologies**

S. No	Name of Investee Company/Startup	Fund Name	Date of Investment	Size of Investment	Action
1	adwawada1231231313, A	test	21/01/2026	12.12	Edit Delete

Previous 1 Next

#### Notes 1:

User is expected to enter fund name in the csv file as shown in the dropdown of the selected fund.

#### Notes 2:

For FoF SLFM applicants,

The field name of Investee Company/ Startup can be read as 'Name of Investee Fund' (Funds in which FoF has made investments).

The field 'Select Fund' can be read to as 'Select Investee Funds in which FoF has made investments'.

- Select Fund** – Dropdown. Shows funds List entered in **B.6 Part A**.

**Select Fund \***

--Select--

Fund 1 (test)

Fund 2 (test 3)

Fund 3 (new2)

**Name of Investee Company/Startup \***  
Enter Name of Investee Company/Startup

**Notes 2:**  
**For FoF SLFM applicants,**  
1. The field name of Investee Company/ Startup can be read as 'Name of Investee Fund' (Funds in which FoF has made investments).  
2. The field 'Select Fund' can be read to as 'Select Investee Funds in which FoF has made investments'.

- Name of Investee Company/Startup \***: Enter Name of Investee Company/Startup.
- Date of Investment (years)** – Calendar picker. *Mandatory*, format dd/mm/yyyy
- Size of Investment** – Textbox. *Mandatory*, alphanumeric, max 64 characters

- **Add Investment**– Button. Validates and saves the input, then clears the fields for next entry

Applicants can enter multiple investments (relevant to the form) using Add Investment Button.

A UI mockup showing two buttons: 'Reset' and 'Add Investment'.

- Click on Add Investment button to adds the company to **Investment table (Part A)**

### Investment Table (Part A)

Select CSV File\*

Choose File No file chosen

Download Template Upload File

**Part A: Investment in companies including startups Advancing RDI-Intensive Technologies**

S. No	Name of Investee Company/Startup	Fund Name	Date of Investment	Size of Investment	Action
1	test 4	test 3	01/01/2026	1212	Edit Delete
2	test 3	test	01/01/2026	4234	Edit Delete
3	test 2	test 3	01/01/2026	5480	Edit Delete
4	test 1	test	01/01/2026	5454	Edit Delete

Previous 1 Next

Previous Save Next

### How to Upload Entry and Exit Valuation Details via .CSV File

- The applicant must download the .CSV template using the Download Template button.

Select CSV File\*

Choose File No file chosen

Download Template Upload File

**Entry and Exit Valuation**

- The applicant can add multiple fund details in the downloaded template.

	A	B	C	D	E
1	company name	fund name	investment size	distribution date	
2	test 1	Fund 1	3434	01-01-2026	
3	test 2	Fund 2	5454	02-01-2026	
4	test 3	Fund 1	6554	03-01-2026	
5	test 4	Fund 2	3456	04-01-2026	
6					
7					
8					

- The Fund Name entered in the CSV file must exactly match the Fund Name available in the Select Fund Name dropdown.

Select Fund \*

--Select--

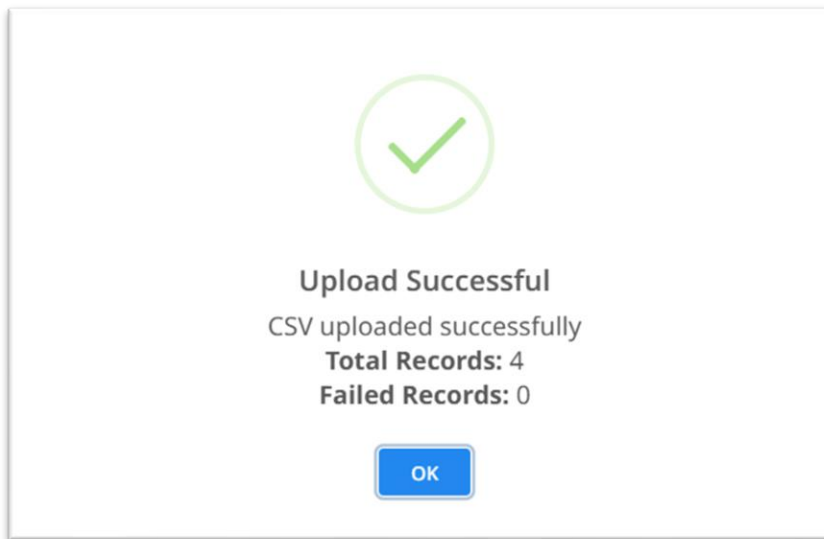
--Select--

Fund 1 (test)

Fund 2 (test 3)

Fund 3 (new2)

- Do not modify the column names or format of the template.
- After uploading the CSV file, the system will display a confirmation message showing passed and failed fund entries.



- All successfully uploaded entries will be added to the Entry and Exit Valuation table.

Reset Add Investment

Select CSV File\*

Choose File
No file chosen

Download Template Upload File

**Part A: Investment in companies including startups Advancing RDI-Intensive Technologies**

S. No	Name of Investee Company/Startup	Fund Name	Date of Investment	Size of Investment	Action
1	test 4	test 3	01/01/2026	1212	<span>Edit</span> <span>Delete</span>
2	test 3	test	01/01/2026	4234	<span>Edit</span> <span>Delete</span>
3	test 2	test 3	01/01/2026	5480	<span>Edit</span> <span>Delete</span>
4	test 1	test	01/01/2026	5454	<span>Edit</span> <span>Delete</span>

Previous 1 Next

Previous Save Next

- **Edit** - User can edit existing Investment details and save using **Update Details** button
- **Delete** – Each row has a delete button.
  1. Click triggers a confirmation dialog: *“Are you sure you want to delete the investment [Investment Name]?”*
  2. **Yes** – Deletes the row.
  3. **No** – No change applied.
- Click on the **Save** button to save Form.
- Click on the **Next** button to continue with the application process.

# Form B.7B – Exits from Companies / Startups Advancing RDI-Intensive Technologies

Captures details of **exits from companies**, including startups, invested by the fund, including **valuation and mode of exit**.

Form B.7B - Exits from companies including startups Advancing RDI-Intensive Technologies

Name of the Applicant Company - AIF Company Name

Category : AIF - Alternative Investment Fund

Preferred Mode of Participation : Contribution

Fund Type : Existing

Select Fund \*

Fund 1 (test) ✓

Name of Investee Company/Startup \*

Select Company Name

Size of Investment \*

Enter Size of Investment

Exit Valuation \*

Enter Exit Valuation

Mode of Exit (IPO/ buy-out/M&A etc) \*

Enter Mode of Exit (IPO/ buy-out/M&A etc)

Notes:

**For FoF SLFM applicants,**

1. The field name of Investee Company/ Startup can be read as 'Name of Investee Fund' (Funds in which FoF has made investments).

2. For 'Exit Valuation', please provide value of units of scheme at the time of exit.

3. For 'Mode of Exit', please provide brief details (incl. IRR) generated.

Reset

Add Exit From Company/Startup

Part B: Exits from companies including startups Advancing RDI-Intensive Technologies

S. No	Fund Name	Name of Investee Company/Startup	Size of Investment	Exit Valuation	Mode of Exit	Action
1	test	adwawada1231231313, A	12.12	12.13	fesfs.13	<div>Edit</div> <div>Delete</div>

Previous

1

Next

Previous

Save

Next

Notes:

## For FoF SLFM applicants,

1. The field name of Investee Company/ Startup can be read as 'Name of Investee Fund' (Funds in which FoF has made investments).
2. For 'Exit Valuation', please provide value of units of scheme at the time of exit.
3. For 'Mode of Exit', please provide brief details (incl. IRR) generated.

- **Select Fund**– Dropdown. Shows funds Selected in B.7A.
- **Name of Investee Company/Startup** - Dropdown based on Selected Fund.

Select Fund \*  
 ✓ ▾

Exit Valuation \*

Notes:  
**For FoF SLFM applicants,**

Name of Investee Company/Startup \*

- **Size of Investment** – Textbox. *Mandatory*, alphanumeric, max 64 characters
- **Exit Valuation** – Textbox. *Mandatory*, alphanumeric, max 64 characters
- **Mode of Exit (IPO / Buy-out / M&A etc.)** – Textbox. *Mandatory*, alphanumeric, max 256 characters
- **Add Exits from company/Startup** – Button. Validates and saves the input, then clears the fields for next entry

- Click on Add Exit from Company/Startup button to adds the company to **Exit table (Part B)**

## Part B: Exits from companies including startups Advancing RDI-Intensive Technologies

Part B: Exits from companies including startups Advancing RDI-Intensive Technologies

S. No	Fund Name	Name of Investee Company/Startup	Size of Investment	Exit Valuation	Mode of Exit	Action
1	Test Fund name 2	test Investee	12	12	12	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

- **Edit** - User can edit existing Company/Startup details.
- **Delete** – Each row has a delete button.
  1. Click triggers a confirmation dialog: “Are you sure you want to delete the Company/Startup [ Company/Startup Name]?”

2. **Yes** – Deletes the row.
  3. **No** – No change applied.
- Click on the **Save** button to save Form.
  - Click on the **Next** button to continue with the application process.

## Form B.8 – Investment Size for R&D Scale-up

Captures the **investment size in USD/INR** for companies engaged in **R&D scale-up activities**, including calculated **average** and **modal** values for performance evaluation.

Form B.8: Investment Size for R&D Scale-up

Name of the Applicant Company - AIF Company Name

Preferred Mode of Participation : Contribution

Category : AIF - Alternative Investment Fund

Fund Type : Existing

Select Fund \*

--Select--

Add More Company

Name of Investee Company/Startup \*

Enter Name of Investee Company/Startup

Investment Size (INR) \*

Investment Size

Save Company

Notes:

1. Please add details of funds (average and modal value of Investments) corresponding to fund selected under the dropdown.

Select Fund \*

--Select--

Average value of investments \*

Enter Average value of investments

Modal value of investments \*

Enter Modal value of investments

Notes:

For FoF SLFM applicants,

1. The field Company Name can be read as Name of Investee Fund (Funds in which FoF has made investments).

2. Please add details of investee funds (average and modal value of Investments) corresponding to fund selected under the dropdown.

Reset

Add fund with investee company/ start up

Fund Details

S NO	Fund Name	Name of Investee Company/Startup	Investment Size	Action
1	test	Test New	125673.00	<div>Edit</div> <div>Delete</div>
2	test	Test Demo	123123.00	<div>Edit</div> <div>Delete</div>

S NO	Fund Name	Average value of investments	Modal value of Investments	Action
------	-----------	------------------------------	----------------------------	--------

### Notes:

For FoF SLFM applicants,

1. The field Company Name can be read as Name of Investee Fund (Funds in which FoF has made investments).

- **Select Fund** – Dropdown, based on Fund Add in previous Forms



Select Fund \*

--Select--

--Select--  
Fund 1 (test)  
Fund 2 (test 3)  
Fund 3 (new2)

Form B.8: Investment Size for R&D Scale-up

Name of the Applicant Company - AIF Company Name  
Category : AIF - Alternative Investment Fund

Preferred Mode of Participation : Contribution  
Fund Type : Existing

Select Fund \*  
Fund 1 (test)

Name of Investee Company/Startup *	Investment Size (INR) *
Company A	12862
Company B	34234

Notes:  
1. Please add details of funds (average and modal value of Investments) corresponding to fund selected under the dropdown.

Select Fund \*  
Fund 1 (test)

Average value of investments \*  
2424

Modal value of investments \*  
3286

Notes:  
For FoF SLFM applicants,  
1. The field Company Name can be read as Name of Investee Fund (Funds in which FoF has made investments).  
2. Please add details of investee funds (average and modal value of Investments) corresponding to fund selected under the dropdown.

Reset Add fund with investee company/ start up

Add More Company

Save Company

- **Add More Company** – Applicant can Add Multiple Company.
- **Save Company** – Adds Company Details to Fund Details Table.
- **Average Value of Investments** – Enter Average Value Investments
- **Modal Value of Investments** – Enter Model Value of Investment.
- Click on **Add Fund with Investee company startup** button to add funds in Fund Details Table

## Fund Details Table

Fund Details				
S NO	Fund Name	Name of Investee Company/Startup	Investment Size	Action
1	test	Test New	125673.00	<a href="#">Edit</a> <a href="#">Delete</a>
2	test	Test Demo	123123.00	<a href="#">Edit</a> <a href="#">Delete</a>
S NO	Fund Name	Average value of investments	Modal value of investments	Action
3	test	2424	3286	<a href="#">Edit</a> <a href="#">Delete</a>

- **Edit** - User can edit existing Fund details.
- **Delete Fund** – Each row has a delete button.
  - Click triggers a confirmation dialog: *“Are you sure you want to delete the fund [Fund Name]?”*
  - **Yes** – Deletes the row.
  - **No** – No change applied.
- Click on the **Save** button to save Form.
- Click on the **Next** button to continue with the application process.

## Form E.1 – Forms Accompanying Documentation

Allows users to **download the prescribed Annexure E.1 format** from the RDIF website and **submit the completed documentation** as part of the application process.

Form E.1: Forms Accompanying Documentation

Name of the Applicant Company - Contribution AIF and FOF

Preferred Mode of Participation : Contribution

Category : AIF - Alternative Investment Fund

Fund Type : New

Download Annexure

#	Annexure Details	Action
1	Annexure E.1: FORM-I – Covering Letter with Letter of Acceptance to Terms and Conditions of NIA (on a Company letterhead)	Download

Upload Supporting Documents

Additional/Supporting submissions, if any

Choose file No file chosen

Upload

PDF, DOC, DOCX, XLS, XLSX only | Max File Size 50 MB

Uploaded Documents

S. No	Document Type	File Name	Action
1	Annexure E.1: FORM-I	1768202586_Annexure-A4.pdf	View  Delete

Declaration

☒ I hereby confirm that I have submitted all the selected documents \*

Previous

Save

Next

- **Download Annexure E.1 Form** – Download Link. *Mandatory*, system allows download of the prescribed Annexure E.1 format from the RDIF website.
- **Submission Confirmation** – System Validation. *Mandatory*, allows submission only after successful document upload. Maximum file size: 50 MB.

## Uploaded Supporting Documents Table

Upload Supporting Documents

Additional/Supporting submissions, if any

Choose file No file chosen

Upload

PDF, DOC, DOCX, XLS, XLSX only | Max File Size 50 MB

Uploaded Documents

S. No	Document Type	File Name	Action
1	Annexure E.1: FORM-I	1768202586_Annexure-A4.pdf	View  Delete

Declaration

☐ I hereby confirm that I have submitted all the selected documents \*

Previous

Save

Next

- **View** - User can View existing Fund details.
- **Delete** – Each row has a delete button.
  - Click triggers a confirmation dialog: “Are you sure you want to delete the Document [Document Name]?”
  - **Yes** – Deletes the row.

- **No** – No change applied.
- Check **Declaration** “I hereby confirm that I have submitted all the selected documents” to proceed
- Click on the **Save** button to save Form.
- Click on the **Next** button to continue with the application process.

## Form E.2 -Declarations Accompanying Documentation

Form E.2: Declarations Accompanying Documentation

Name of the Applicant Company - Contribution AIF and FOF

Category : AIF - Alternative Investment Fund

Preferred Mode of Participation : Contribution

Fund Type : New

Download Annexure

#	Annexure Details	Action
1	Annexure E.2 - Declaration 1: Declaration of Non-Blacklisting	<a href="#">Download</a>
2	Annexure E.2 - Declaration 2: Declaration of Solvency	<a href="#">Download</a>
3	Annexure E.2 - Declaration 3: Declaration of Non-Association	<a href="#">Download</a>
4	Annexure E.2 - Declaration 4: Current Funding Partners/Collaborations	<a href="#">Download</a>

Upload Supporting Documents

Additional/Supporting submissions, if any

Choose file

No file chosen

Upload

PDF, DOC, DOCX, XLS, XLSX only | Max File Size 50 MB

Uploaded Documents

S. No	Document Type	File Name	Action
-------	---------------	-----------	--------

Declaration

☐ I hereby confirm that I have submitted all the selected documents \*

- Click on **Download Annexure E.2 Form and Declaration 1,2,3,4** – Download Link. *Mandatory*, system allows download of the prescribed Annexure format from the RDIF website.
- **Upload Button** – System Validation. *Mandatory*, allows submission only after successful document upload. Maximum file size: 50 MB.

### Uploaded Supporting Documents Table

**Upload Supporting Documents**

Additional/Supporting submissions, if any

Choose file No file chosen

PDF, DOC, DOCX, XLS, XLSX only | Max File Size 50 MB

Upload

		Action
	Annexure A3 (5).pdf	<a href="#">View</a> <a href="#">Delete</a>
2	Annexure E.2 - Declaration 3: Declaration of Non-Association 1768205685_Annexure-A3 (5).pdf	<a href="#">View</a> <a href="#">Delete</a>

**Declaration**

☐ I hereby confirm that I have submitted all the selected documents \*

[Previous](#) [Save](#) [Next](#)

- **View** - User can View existing document details.
- **Delete** – Each row has a delete button.
  - Click triggers a confirmation dialog: *“Are you sure you want to delete the Document [Document Name]?”*
  - **Yes** – Deletes the row.
  - **No** – No change applied.
- Check **Declaration** “I hereby confirm that I have submitted all the selected documents” to proceed
- Click on the **Save** button to save Form.
- Click on the **Next** button to continue with the application process.

## Form E.3: Undertaking by Applicants for Selection as SLFMs

**Form E.3: Undertaking by Applicants for Selection as SLFMs**

**Name of the Applicant Company - Contribution AIF and FOF**  
**Category :** AIF - Alternative Investment Fund

**Preferred Mode of Participation :** Contribution  
**Fund Type :** New

**Download Annexure**

#	Annexure Details	Action
1	Annexure E.3: Undertaking by Applicants for Selection as SLFMs	<a href="#">Download</a>

**Upload Supporting Documents**

Additional/Supporting submissions, if any

Choose file No file chosen

PDF, DOC, DOCX, XLS, XLSX only | Max File Size 50 MB

**Uploaded Documents**

S. No	Document Type	File Name	Action
1	Additional/Supporting submissions, if any	1768206256_Annexure-A3 (5).pdf	<a href="#">View</a> <a href="#">Delete</a>
2	Organization Seal	1768206267_Annexure-A4 (2).pdf	<a href="#">View</a> <a href="#">Delete</a>

**Declaration**

☐ I hereby confirm that I have submitted all the selected documents \*

[Previous](#) [Save](#) [Next](#)

- Click on **Download Annexure E.3 Form** – Download Link. *Mandatory*, system allows download of the prescribed Annexure E.3 format from the RDIF website.

**Upload Supporting Documents**

Additional/Supporting submissions, if any

Choose file No file chosen

PDF, DOC, DOCX, XLS, XLSX only | Max File Size 50 MB

**Uploaded Documents**

S. No	Document Type	File Name	Action
1	Additional/Supporting submissions, if any	1768206256_Annexure-A3 (5).pdf	<a href="#">View</a> <a href="#">Delete</a>
2	Organization Seal	1768206267_Annexure-A4 (2).pdf	<a href="#">View</a> <a href="#">Delete</a>

**Declaration**

☐ I hereby confirm that I have submitted all the selected documents \*

- View** - User can View existing document details.
- Delete** – Each row has a delete button.
- Click triggers a confirmation dialog: “Are you sure you want to delete the Document [Document Name]?”
- Yes** – Deletes the row.
- No** – No change applied.
- Check **Declaration** “I hereby confirm that I have submitted all the selected documents” to proceed
- Click on the **Save** button to save Form.
- Click on the **Next** button to continue with the application process.

## Preview Form (Quality Criteria)

Displays a consolidated view of all Quality Criteria forms for review and modification before proceeding.

After completing all Quality Criteria forms, users can access the Preview to review and Edit/Update details if required.

	
<b>Application for Selection as SLFM to the RDIF</b>	
Application Number: <b>AIF20260100041</b>	
Date of Submission of Application: <b>12-01-2026</b>	
<b>Preferred Mode of Participation:</b>	
Contribution:	
<b>Category of SLFM:</b>	
AIF - Alternative Investment Fund	
<b>Organisation Details</b>	
Name of organisation: <b>Contribution AIF and FOF</b>	
Date of registration: <b>11-01-2026</b>	
GST number:	
PAN number: <b>EVOOF1234H</b>	
Company address: <b>Corporate AIF address</b>	
Registered address: <b>Registered Office address</b>	
<b>Details of Authorised Person:</b>	
Name: <b>Applicant AIF and FOF</b>	
Designation: <b>designation of AIF and FOF</b>	
Email ID: <b>contribution.aifandfof@yopmail.com</b>	
Mobile number: <b>8765463638</b>	
Phone Number (Landline): <b>8998988989</b>	
Address: <b>Test Physical Address</b>	

**Form B.6 Part B: Entry and Exit Valuations** 

Table B.6   Part B   Fund 1			
S.No.	Name of Investee Company / Startup	Entry Valuation	Exit Valuation
01	qw	13	13

**Form B.7 Investment and Exits to advance RDI-intensive Technologies** 

**Form B.7 | Part A: Investment in companies including startups Advancing RDI-Intensive Technologies**

Table B.7   Part A				
Sr. No.	Name of Investee Company / Startup	Fund Name	Date of Investment (Years)	Size of Investment
01	test Investee	Test Fund name 2	2026	12


**Form B.7 | Part B: Exits from companies including startups Advancing RDI-Intensive Technologies** 

Table B.7   Part B					
S.No.	Name of Investee Company/Startup	Fund Name	Size of Investment	Exit Valuation	Mode of Exit (IPO/ buy-out/M&A etc)
01	test Investee	Test Fund name 2	12	12	12


**Form B.8: Investment Size for R&D Scale-up** 

Table B.8   Fund 1		
S.No.	Name of Investee Company / Startup	Investment Size (INR/USD)
01	test Investee 1	12.00
<b>Average value of investments</b>		12.00

- The Preview page displays all entered details. Users can edit information form-wise by clicking **Edit**, which redirects them to the respective form before proceeding with the application.


**Form B.7 | Part B: Exits from companies including startups Advancing RDI-Intensive Technologies** 

Table B.7   Part B					
S.No.	Name of Investee Company/Startup	Fund Name	Size of Investment	Exit Valuation	Mode of Exit (IPO/ buy-out/M&A etc)
01	test Investee	Test Fund name 2	12	12	12



**Form B.8: Investment Size for R&D Scale-up** 

Table B.8   Fund 1		
S.No.	Name of Investee Company / Startup	Investment Size (INR/USD)
01	test Investee 1	12.00
<b>Average value of investments</b>		12.00
<b>Modal value of investments</b>		12.00

**Form E.1: Forms Accompanying Documentation** 

Forms submitted by applicant: Submitted

S.No.	Document/File Name	Submission Status
1	Additional/Supporting submissions, if any	Not Submitted
2	Annexure E.1: FORM-I	Submitted



- After verifying and confirming all details in the Quality Criteria forms, the user can proceed to the Cost Criteria form by clicking the **Goto Cost Criteria** button.


### DECLARATION

(To be signed by the applicant  
Or  
its Authorised Person)

The particulars given are true and correct. Nothing material has been suppressed. It is certified that I/ We have read the *Implementation Guidelines for the Research Development and Innovation Scheme* and the *Notice Inviting Applications for Second Level Fund Managers*, and undertake to abide by them on behalf of my/ our organisation/ institution. The financial assistance, if provided, shall be put to the declared use.

Choose File
No file chosen
Upload Signature

JPEG, JPG, PNG only




Signature

APPLICANT/ AUTHORISED PERSON DIGITAL SIGNATURE

With Digital Company Seal

Choose File
No file chosen
Upload Company Seal

JPEG, JPG, PNG only



Company Seal

**Date:** ✓ Saved

12-12-2026 11:11
📅

Previously saved: 12-12-2026 11:11 AM

**Place:** ✓ Saved

4t4eete

Previously saved: 4t4eete

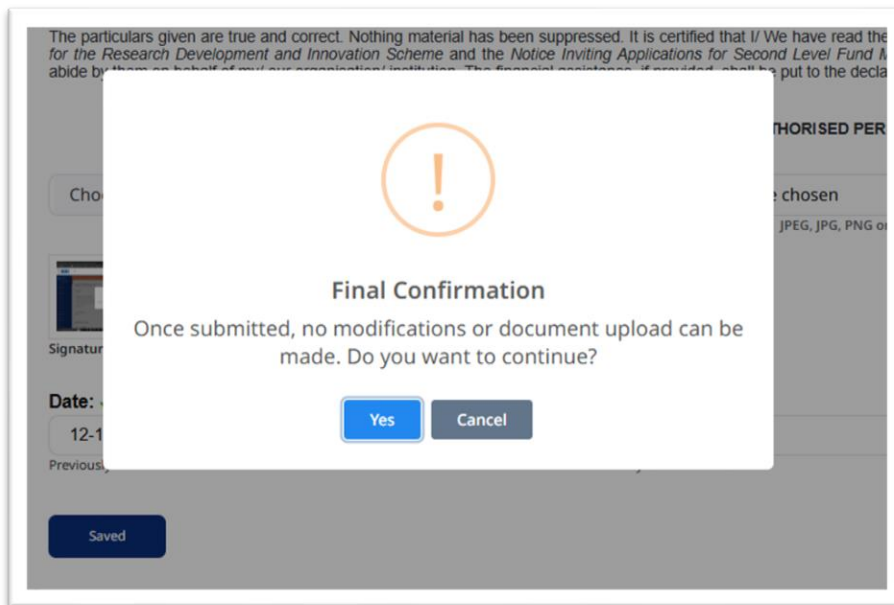
Saved

Do you want to submit PART-A?

Download Form

#### Declaration Section – Process & Validation:

- User must upload:
  - **Authorized Signature**
  - **Company Seal**
- User must enter:
  - **Date**
  - **Place**



- After completing the above details:
  - User will get the option to **Submit Part-A**.
  - User can **download the Part-A form**:
    - **Before submission**
    - **After submission**
- When the applicant clicks on “**Do you want to submit Part-A?**”:
  - An **alert message** will be displayed stating that **once Part-A is submitted, no further changes will be allowed**.

## B. Cost Criteria

The Cost Criteria section captures financial proposals and cost-related details submitted by the applicant.

### Form B.3: Cost Criteria for AIFs: Documentation Requirements

This form captures the **cost-related parameters** proposed by the Applicant for the AIF investment, including management fee, carried interest, and supporting documents. It ensures transparency and alignment with RDIF expectations.

### Form B.3 : Cost Criteria for AIFs: Documentation Requirements

Name of the Applicant Company - AIF Company Name

Preferred Mode of Participation : Contribution

Category : AIF - Alternative Investment Fund

Fund Type : Existing

#### Checklist

#	Particulars	Details / Input
1	<input type="checkbox"/> <b>Management Fee *</b> Management fee proposed to be charged per annum from RDIF, as a percentage of: Aggregate Capital Commitment at the beginning of the year, from initial closing date until end of Commitment Period Outstanding investment amounts after the Commitment Period *Please fill form B.9 to enter Management fee. Any additional documents can be uploaded in this Form B.3.	
2	<b>Justification for Management Fee *</b> Explain how the proposed fee aligns with SLFM's risk profile, target returns, and industry benchmarks.	Maximum 2000 words (~12000 characters)
3	<input type="checkbox"/> <b>Carried Interest *</b> Carried interest proposed to be charged from RDIF at the end of the Fund tenure, as a percentage of the profit Round of distributions. *Please fill form B.9 to enter Carried Interest*. Any additional documents can be uploaded in this Form B.3.	
4	<b>Justification for Carried Interest*</b> Explain how the proposed carried interest aligns with SLFM's risk profile, target returns, and industry benchmarks.	Maximum 2000 words (~12000 characters)

#### Note:

1. To be treated as commercial confidence under Section 8(1)(d) of the Right to Information Act 2005.
2. If only one or no prior Fund has been launched previous to this one, as Schemes of the current Trust / with the current management team: details may be provided for previous funds with which individual Partners were earlier associated.
3. If justification exceeds the size, Applicants are requested to upload document with further details, in addition to entered details

#### Undertaking

- ☐ **Written undertaking, accompanying the Private Placement Memorandum document.** To be treated as commercial confidence under Section 8(1)(d) of the Right to Information Act 2005. If only one or no prior Fund has been launched previous to this one, as Schemes of the current Trust / with the current management team: details may be provided for previous funds with which individual Partners were earlier associated.

**Note: 1.** Documents under this form are to be submitted with Form B.9.

- **Management Fee** – Checkbox indicating the management fee proposed to be charged per annum from RDIF, expressed as a percentage of:
  1. Aggregate Capital Commitment at the beginning of the year (from initial closing date until end of Commitment Period)
  2. Outstanding amounts of the Investments of the Fund after the end of Commitment Period
- **Justification for Management Fee** – Text area to explain how the proposed fee aligns with SLFM's risk profile, target returns, and industry benchmarks.
- **Carried Interest** – Checkbox indicating the Carried interest proposed to be charged from RDIF at the end of the Fund tenure, as a percentage of the profit Round of distributions
- **Justification for Carried Interest** – Text area to explain how the proposed carried interest aligns with SLFM's risk profile, target returns, and industry benchmarks.
- Select the Undertaking checkbox to proceed further.

Undertaking

☒ Written undertaking, accompanying the Private Placement Memorandum document.

To be treated as commercial confidence under Section 8(1)(d) of the Right to Information Act 2005. If only one or no prior Fund has been launched previous to this one, as Schemes of the current Trust / with the current management team: details may be provided for previous funds with which individual Partners were earlier associated.

Uploaded Supporting Documents Table

Upload Supporting Documents

Additional/Supporting submissions, if any

Choose file
No file chosen

Upload

PDF, DOC, DOCX, XLS, XLSX only | Max File Size 50 MB

Uploaded Documents

S. No	File Name	Action
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Previous

Save

Next

- View** - User can View existing document details.
- Delete** – Each row has a delete button.
  - Click triggers a confirmation dialog: *“Are you sure you want to delete the Document [Document Name]?”*
  - Yes** – Deletes the row.
  - No** – No change applied.
- Check **Declaration** “I hereby confirm that I have submitted all the selected documents” to proceed
- Click on the **Save** button to save Form.
- Click on the **Next** button to continue with the application process.

## Form B.9 – Cost Criteria Parameter Template for AIF Investment

This form captures the **cost-related parameters** for an AIF investment, including management fees and carried interest. It ensures that applicants provide detailed, verifiable information on the financial structure of the fund.

Form B9: Cost Criteria Parameter Template for AIF Investment

Name of the Applicant Company - AIF Company Name  
Category : AIF - Alternative Investment Fund

Preferred Mode of Participation : Contribution  
Fund Type : Existing

Management Fee (Numeric Format) \*  
555

Management Fee (in Alphabet / Word format) \*  
eight percent

Carried Interest (Numeric Format) \*  
20.33%

Carried Interest (in Alphabet / Word format) \*  
Twenty point thirty three percent

**Instruction :** Applicants must note their proposed Management Fee and Carried Interest must be written in both numerical and alphabetical format. The alphabetical format must be suffixed with an 'only' (E.g. One percent only). Please note that in case of a mismatch between the numerical and alphabetical formats, it is the alphabetical format that would be taken as the official submission.

**Note:**  
1. The Management Fee charged by the AIF from RDIF, subject to a maximum of 2% per annum  
a. of the aggregate Capital Commitment at the beginning of the year, from the initial closing date until the end of the Commitment Period  
b. of the actual invested capital, if it is lesser than the committed capital, or as a percentage of the underlying value of the assets under management (AUM) of the fund, after the end of the Commitment Period.  
2. Carried Interest charged by the AIF, not exceeding 20% of the AIF SLFM's distributions after return of capital, hurdle rate, and catch-up.

Previous Save Next

**Instruction:** Applicants must note their proposed Management Fee and Carried Interest must be written in both numerical and alphabetical format. The alphabetical format must be suffixed with an 'only' (E.g. One percent only). Please note that in case of a mismatch between the numerical and alphabetical formats, it is the alphabetical format that would be taken as the official submission.

**Management Fee (Numeric Format):** Enter the management fee as a **numeric value** (percentage) to be charged per annum from RDIF.

- **Management Fee (in Alphabet / Word format):** Enter the **same management fee in words**, to avoid discrepancies in interpretation.
- **Carried Interest (Numeric Format):** Enter the carried interest as a **numeric value** (Carried interest proposed to be charged from RDIF at the end of the Fund tenure, as a percentage of the profit Round of distributions).
- **Carried Interest (in Alphabet / Word format):** Enter the **carried interest in words**, corresponding to the numeric value above.
- Click on the **Save** button to save Form.
- Click on the **Next** button to continue with the application process.

## Preview (Cost Criteria)

Displays a consolidated view of all Cost Criteria forms for review and modification before proceeding.

After completing all Cost Criteria forms, users can access the **Preview** to review and Edit/Update details if required.

	
<b>Application for Selection as SLFM to the RDIF</b>	
Application Number: <u>AIF20260100041</u>	
Date of Submission of Application: <u>12-01-2026</u>	
<b>Preferred Mode of Participation:</b>	
Contribution:	
<b>Category of SLFM:</b>	
AIF - Alternative Investment Fund	
<b>Organisation Details</b>	
Name of organisation: <u>Contribution AIF and FOF</u>	
Date of registration: <u>11-01-2026</u>	
GST number:	
PAN number: <u>EVOOF1234H</u>	
Company address: <u>Corporate AIF address</u>	
Registered address: <u>Registered Office address</u>	
<b>Details of Authorised Person:</b>	
Name: <u>Applicant AIF and FOF</u>	
Designation: <u>designation of AIF and FOF</u>	
Email ID: <u>contribution.aifandfof@yopmail.com</u>	
Mobile number: <u>8765463638</u>	
Phone Number (Landline): <u>8998988989</u>	
Address: <u>Test Physical Address</u>	

### Form B3: : Cost Criteria for AIFs: Documentation Requirements

#### 1. Management Fee

Management fee proposed to be charged per annum from RDIF, as a percentage of:  
Aggregate Capital Commitment at the beginning of the year, from initial closing date until end of Commitment Period  
Outstanding investment amounts after the Commitment Period  
Documents under this form are to be submitted with Form B.9.

#### 2. Justification for Management Fee \*

Explain how the proposed fee aligns with SLFM's risk profile, target returns, and industry benchmarks.  
test

#### 3. Justification for Carried Interest \*

Explain how the proposed carried interest aligns with SLFM's risk profile, target returns, and industry benchmarks.  
test

S.No.	Document/File Name	Submission Status
1	Additional/Supporting submissions, if any	Not Submitted
2	(ii) Specify the Management Fee, and Carried Interest rate with justification for proposed fee/ rate. Explain how these proposed values aligns with the SLFM's risk profile, target returns, and industry benchmarks	Not Submitted
3	(i) Written undertaking, accompanying the Private Placement Memorandum document.	Not Submitted

S.No.	Document Name	Document/File Name	Action
	No documents uploaded		

### Form B9: Cost Criteria Parameter Template for AIF Investment

Management Fee (Numeric Format) : 12  
Management Fee (in Alphabet / Word format): Two percent  
Carried Interest (Numeric Format) : 12  
Carried Interest (in Alphabet / Word format) : twelve prcent

- The Preview page displays all entered details. Users can edit information form-wise by clicking **Edit**, which redirects them to the respective form before proceeding with the application.

## DECLARATION

(To be signed by the applicant  
Or  
its Authorised Person)

The particulars given are true and correct. Nothing material has been suppressed. It is certified that I/ We have read the *Implementation Guidelines for the Research Development and Innovation Scheme* and the *Notice Inviting Applications for Second Level Fund Managers*, and undertake to abide by them on behalf of my/ our organisation/ institution. The financial assistance, if provided, shall be put to the declared use.

### APPLICANT/ AUTHORISED PERSON DIGITAL SIGNATURE

With Digital Company Seal

<div>Choose File   No file chosen</div> <div>JPEG, JPG, PNG only</div> <div></div> <div>Signature</div> <div>Upload Signature</div>	<div>Choose File   No file chosen</div> <div>JPEG, JPG, PNG only</div> <div></div> <div>Company Seal</div> <div>Upload Company Seal</div>
--	--

Date:

23-01-2026 12:12



Saved: 23-01-2026 12:12 PM

Place:

Noida

Saved: Noida

Saved

Download Form

### Password Protection for Cost Criteria

Applicant need to protect cost criteria section with password

Enter Password \*

Enter password



Confirm Password \*

Enter password



Do you want to submit PART-B?

### Declaration Section – Process & Validation:

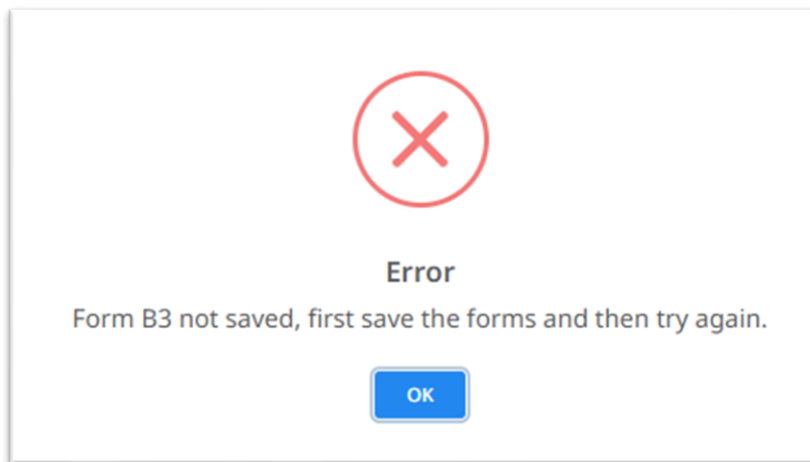
#### Part B – Submission Process:

- User is required to **password-protect Part B**.
- User must enter:
  - **Password**
  - **Confirm Password**

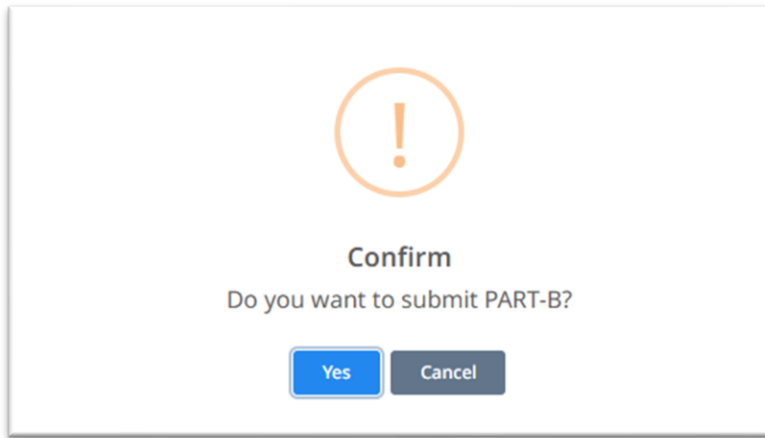


After verifying all details, the user must protect the **Cost Criteria** section by **entering and confirming a password**.

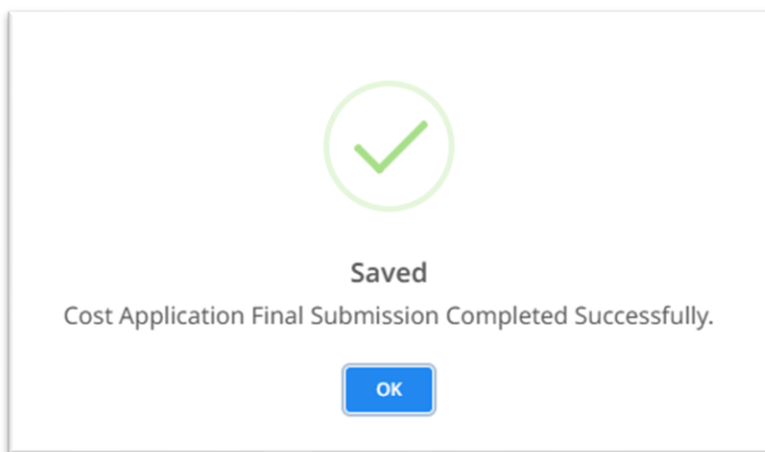
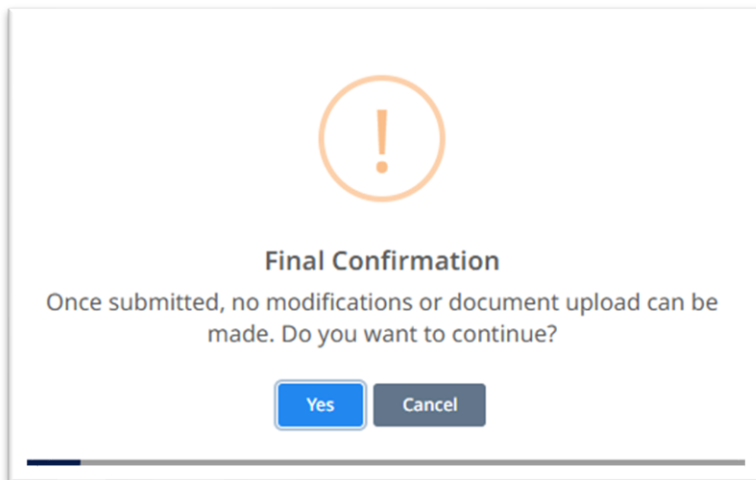
- System should validate that **Password and Confirm Password match**.
- After successful validation, user needs to click on **“Submit Part-B”** to complete the process.
- User must upload:
  - **Authorized Signature**
  - **Company Seal**
- User must enter:
  - **Date**
  - **Place**
- After completing the above details:
  - User will get the option to **Submit Part-B**.
  - User can **download the Part-B form**:
    - **Before submission**
    - **After submission**
- When the applicant clicks on **“Do you want to submit Part-B?”** the system performs form-wise validation across all sections if any validation fails, the system highlights the forms that are incomplete or not properly filled.



- If all validations are successful, a confirmation message is displayed.
- An **alert message** will be displayed stating that **once Part-A is submitted, no further changes will be allowed**



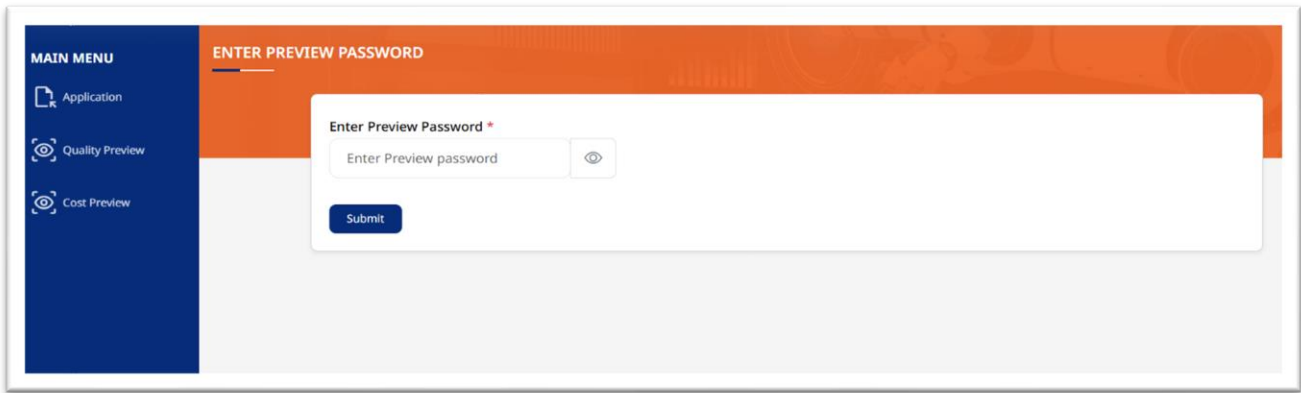
- After confirmation of Part B submission, a Final confirmation message will be displayed stating that Part B has been submitted successfully.




## Quality Preview and Cost Preview

After final submission, the user can view the application details through the side menu options **Quality Preview** and **Cost Preview**. To access the Cost Preview, the user must enter the same password that was set during final submission of the application.

- After final submission, the user can access the application details from the side menu.
- The **Quality Preview** option allows the user to view all quality-related details.
- The **Cost Preview** option allows the user to view cost-related details.
- To access the **Cost Preview**, the user must enter the password that was set at the time of final submission.



- Upon successful password verification, the Cost Preview details are displayed.



**Form B3: Cost Criteria for AIFs: Documentation Requirements**

**1. Management Fee**  
Management fee proposed to be charged per annum from RDIF, as a percentage of Aggregate Capital Commitment at the beginning of the year, from initial closing date until end of Commitment Period Outstanding investment amounts after the Commitment Period  
Documents under this form are to be submitted with **Form B.9**.

**2. Justification for Management Fee \***  
Explain how the proposed fee aligns with SLFM's risk profile, target returns, and industry benchmarks.  
test

**3. Justification for Carried Interest \***  
Explain how the proposed carried interest aligns with SLFM's risk profile, target returns, and industry benchmarks.  
test

S.No.	Document/File Name	Submission Status
1	Additional/Supporting submissions, if any	Not Submitted
2	(ii) Specify the Management Fee, and Carried Interest rate with justification for proposed fee/ rate. Explain how these proposed values aligns with the SLFM's risk profile, target returns, and industry benchmarks	Not Submitted
3	(i) Written undertaking, accompanying the Private Placement Memorandum document.	Not Submitted

S.No.	Document Name	Document/File Name	Action
No documents uploaded			

**Form B9: Cost Criteria Parameter Template for AIF Investment**

Management Fee (Numeric Format) : 12  
Management Fee (in Alphabet / Word format): **Two percent**  
Carried Interest (Numeric Format) : 12  
Carried Interest (in Alphabet / Word format) : **twelve percent**

For any query regarding SLFM Application Submission, This Email may be used: -

Mail: [rdifundanrf@gmail.com](mailto:rdifundanrf@gmail.com)

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