

Instructions and Guidelines for the Shareholder Portal

The Shareholder Portal can be accessed at <https://www.infosys.com/investors/shareholder-services/dividend-tax.html>. Some of the important information about this portal and its related features are given below.

1. What is the usage of this Portal?

Answer: This Portal is aimed for submission of tax forms, tax documents and tax declarations applicable in relation to Tax Deduction at Source (TDS) / Withholding of Taxes (WHT) on dividend for Resident and Non-resident shareholders.

2. Who can use this Portal?

Answer: Any shareholder of Infosys Limited as on the record date for payment of dividend can register and login into this portal.

3. Where can the portal be accessed?

Answer: Portal can be accessed by clicking into the below hyperlink

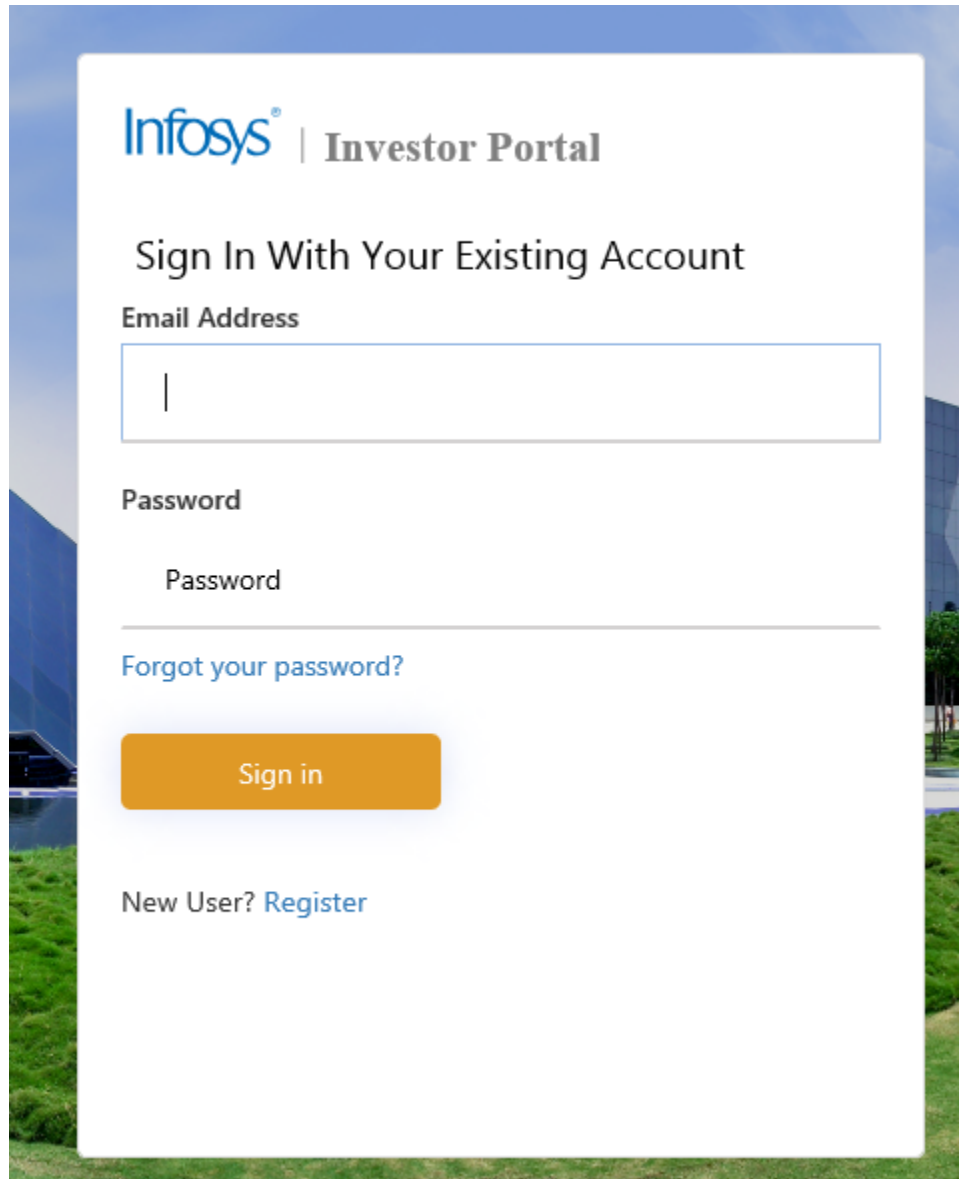
<https://www.infosys.com/investors/shareholder-services/dividend-tax.html>

After clicking onto the above portal, Shareholder can click on the hyperlink of “**Shareholder portal**” which will direct the shareholder to registration and login page of portal. See below image: -

The company is enabling a **shareholder portal** from June 1, 2020 for shareholders to upload the relevant tax documents for purposes of tax deduction at source. We request shareholders to upload the relevant documents between June 1, 2020 to June 15, 2020. No documents will be considered after June 15, 2020. We request shareholders to kindly take note of it accordingly.

4. How to register or login in Portal?

Answer: After clicking onto the above mentioned “shareholder portal”, Shareholder will be directed a new webpage for creation of registration and login. Below image shows the same:

The image shows the 'Sign In' page of the Infosys Investor Portal. The page has a white background with a blue header area. At the top left, the 'Infosys' logo is followed by the text 'Investor Portal'. Below this, the heading 'Sign In With Your Existing Account' is centered. Under the heading, there are two input fields: 'Email Address' and 'Password'. The 'Email Address' field contains a single vertical line character. Below the 'Password' field, there is a horizontal line and a link that says 'Forgot your password?'. A large orange button with the text 'Sign in' is positioned below the links. At the bottom of the form, there is a link that says 'New User? Register'. The entire form is set against a background image of a modern building and greenery.

First time user has to first register into the portal.

For registering, click on “**Register**”

Sign In With Your Existing Account

Email Address

Email Address

Password

Password

[Forgot your password?](#)

Sign in

New User? [Register](#)

After clicking on “Register”, a new window will open for registration. For making registration, please enter - Permanent Account number (PAN) and DP ID & Client/Folio ID.

InvestorPortal

investorstest.infosys.com/sign-up

Register

PAN

DP ID & Client/Folio ID ⓘ

Demat Sequence No. –

- a. Shares held in Physical mode - Folio No. (Eg: ITL000000)
- b. Shares held in Dematerialized Mode:
 - NSDL - 6 digit/character DP ID and 8 digit client ID (Eg: IN3000001000000)
 - CDSL - 16 digit client ID (Eg: 1200000000002000)

VERIFY

Dear Shareholder, In case of shareholder having multiple Folio No/DPID & Client, then any Folio No/DPID & Client can be used to create the login credentials. Any Folio No/DPID & Client and Permanent Account Number (PAN) can be used for registration at this portal. The Tax forms or various documents submitted at the portal would be considered for all other Folio No/DPID & Client which has same Permanent Account Number (PAN) registered as per the information available with the depositories (NSDL/CDSL) or by the Registrar and Share Transfer Agent (KFin Technologies Private Limited).

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Desktop 11:46 AM 5/31/2020

Notes: a) PAN is Permanent Account Number allotted by Income Tax Department.

b) Kindly note below while filling **“DP ID & Client/Folio ID”** while registration.

(b)(i). Shares held in Physical mode - Folio No. (Eg: ITL000000)

(b)(ii). Shares held in Dematerialized Mode

NSDL - 6 digit/character DP ID and 8-digit client ID (Eg: IN3000001000000)

CDSL - 16-digit client ID (Eg: 1200000000002000)

Once, “PAN” and “DP ID & Client/Folio ID” are filled, click on **“VERIFY”**

Register

PAN

[REDACTED]

DP ID & Client/Folio ID ⓘ

[REDACTED]

VERIFY

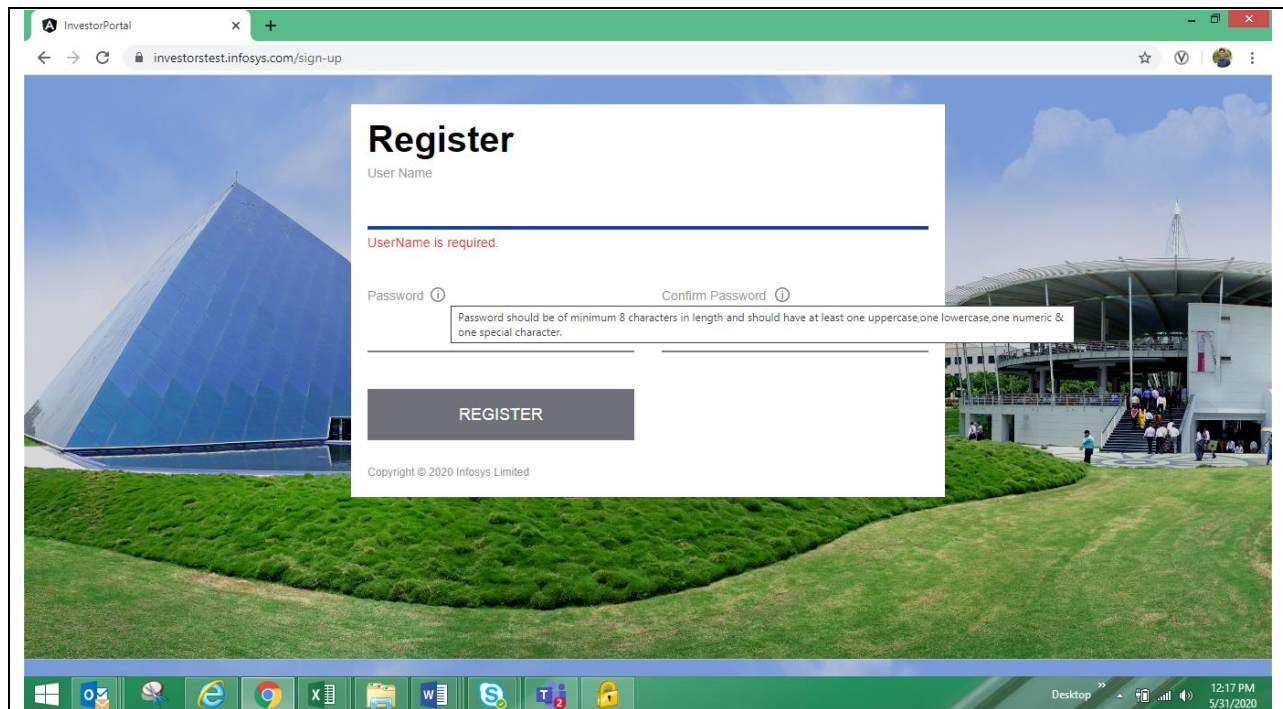
Dear Shareholder, In case of shareholder having multiple Folio No/DPID & Client, then any Folio No/DPID & Client can be used to create the login credentials. Any Folio No/DPID & Client and Permanent Account Number (PAN) can be used for registration at this portal. The Tax forms or various documents submitted at the portal would be considered for all other Folio No/DPID & Client which has same Permanent Account Number (PAN) registered as per the information available with the depositories (NSDL/CDSL) or by the Registrar and Share Transfer Agent (KFin Technologies Private Limited).

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After clicking onto “VERIFY”, Shareholder shall enter “User Name” and password.

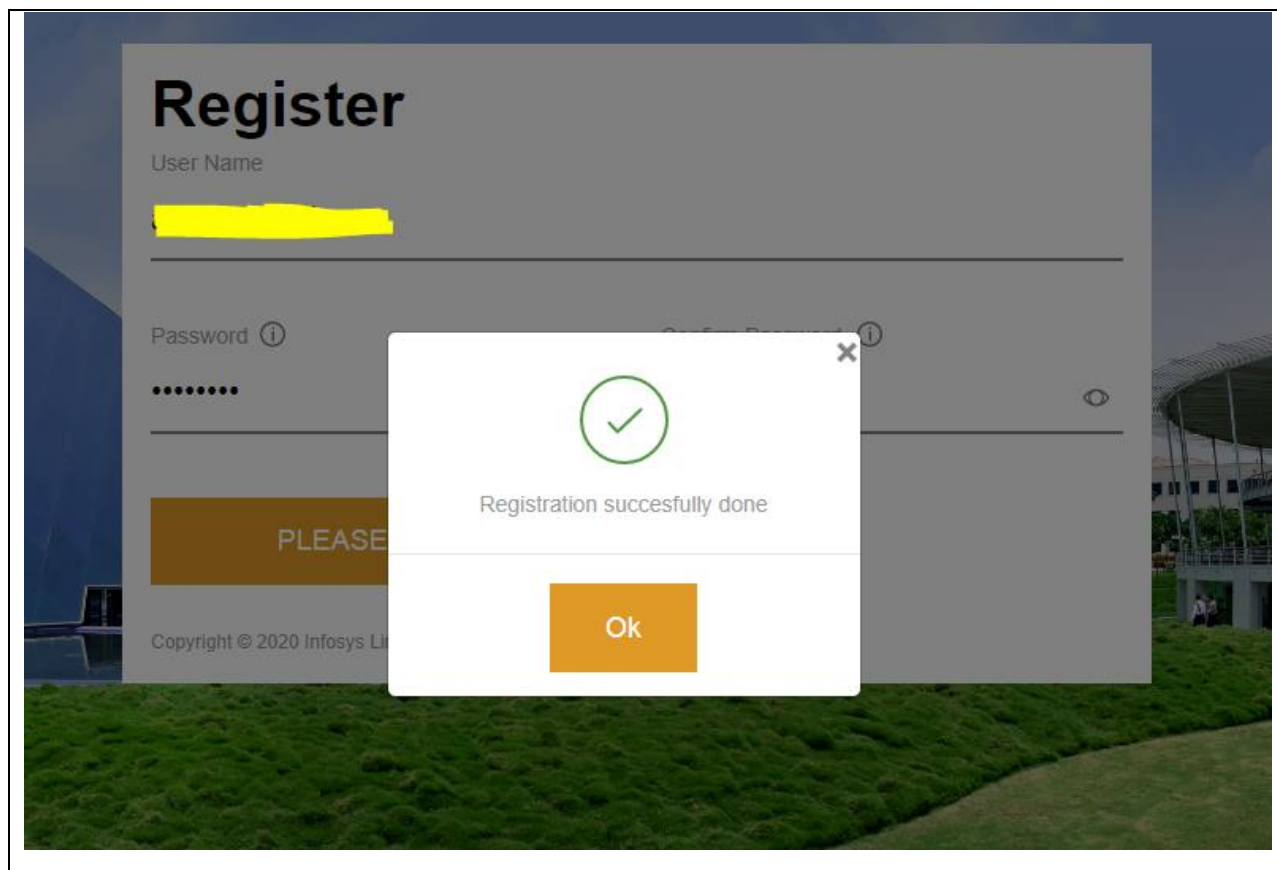
Note – a) **User Name should be e-mail id which will be used for login subsequently.**

b) **Kindly note character for creating a valid password. Password should be of minimum 8 characters in length and should have at least one uppercase, one lower case, one numeric & one special character.**



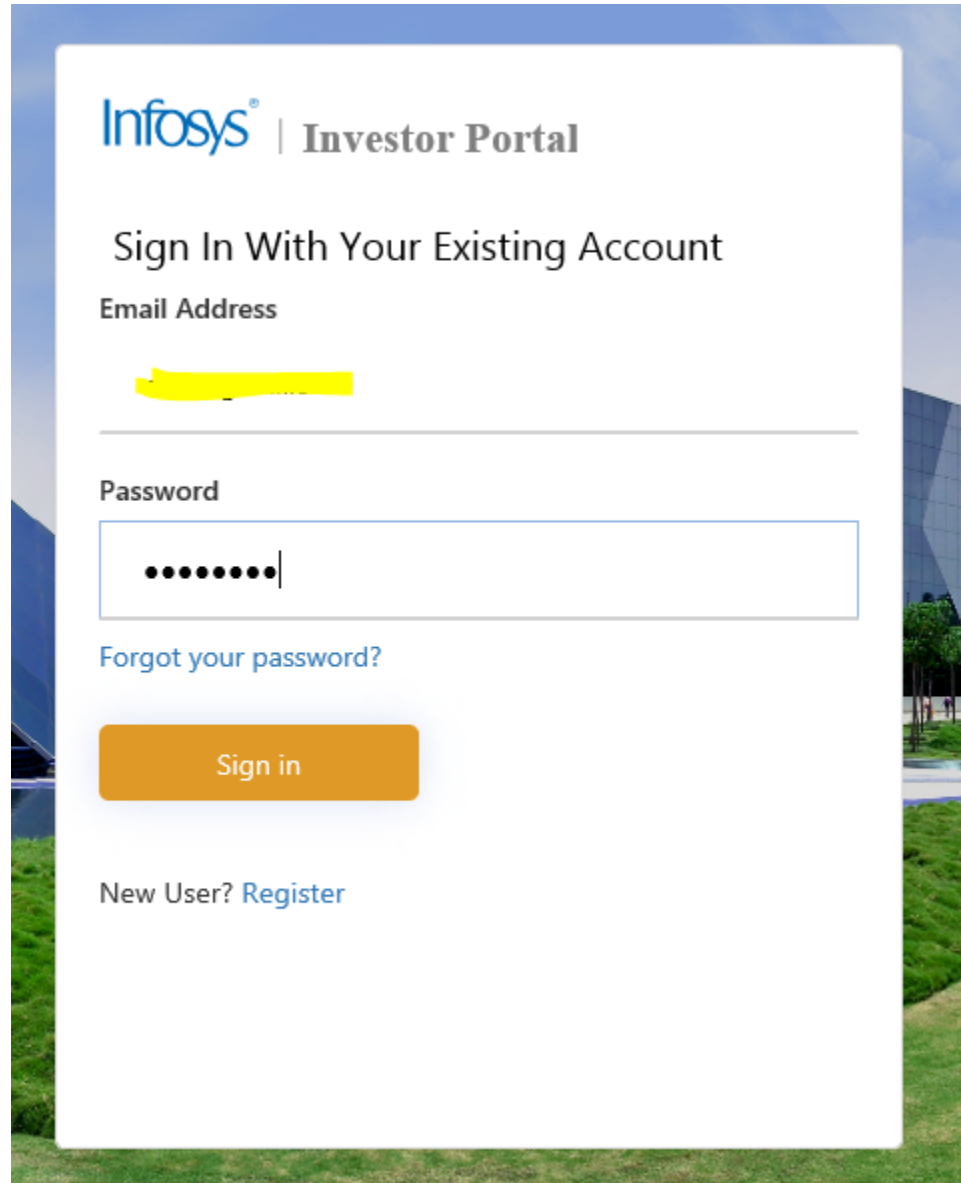
Once the email id & password provided, shareholder should click on “REGISTER” – see below image.

After clicking Register, a message will arise that “Registration successfully done” - see below image. It shows that shareholder is registered into portal for uploading various documents/declarations/other compliances.



5. How to login into the Portal?

Answer: Once registration is complete, shareholder can visit the “**Shareholder portal**” link (Refer above point -3) and then can login (**Sign in**) into the portal using the same email id & password which is used as above for registration. Below is the image showing the same:-

The image shows a screenshot of the Infosys Investor Portal login page. The page has a white background with a blue header bar. The Infosys logo is in the top left, followed by the text "Investor Portal". Below this, the heading "Sign In With Your Existing Account" is centered. There are two input fields: "Email Address" and "Password". The email address field contains a redacted email address. The password field contains a series of dots. Below the password field, there is a link "Forgot your password?". A large orange "Sign in" button is centered below the links. At the bottom, there is a link "New User? Register". The background of the page shows a modern building and greenery.

After clicking onto “Sign in “, user has to read Privacy & Data Protection guidelines.

After accepting the Privacy & Data Protection Policy, a new window will appear showing profile details and relevant sections as applicable to such shareholder.

6. Profile section?

Answer: Shareholder should check their information as appearing in the profile section.

Kindly Note that the company has considered the information available with the depositories(NSDL/CDSL) or by the Registrar and Share Transfer Agent(KFin Technologies Private Limited) as on the record date. We request you to kindly verify the correctness of the records and for any changes to update the same with your depository participant (if you hold shares in dematerialized mode) or the Registrar and Share Transfer Agent(if you hold shares in physical mode).

Profile information can be verified by checking the box at the bottom of profile page and clicking on save button. See below image for reference -

The screenshot shows the 'Profile' section of the Infosys portal. At the top, there's a navigation bar with 'Infosys', 'TaxForms', 'FAQ', and 'SignOut'. Below this, the 'Profile' heading is followed by a disclaimer: 'The company has considered the information available with the depositories(NSDL/CDSL) or by the Registrar and Share Transfer Agent (KFin Technologies Private Limited) as on the record date. We request you to kindly verify the correctness of the records and for any changes to update the same with your depository participant(if you hold shares in dematerialized mode) or the Registrar and Share Transfer Agent(if you hold shares in physical mode).' The form is divided into two sections: 'Personal Details' and 'Demat A/c details'. Under 'Personal Details', there are input fields for 'Name' and 'PAN', both containing redacted information. Under 'Demat A/c details', there is an input field for 'DP ID & Client/Folio ID' also containing redacted information. Below these fields, a disclaimer states: 'Dear Shareholder, The Folio No/DPID & Client and Permanent Account Number (PAN) displayed here are same which was used at the time of registration at the portal. The Tax forms or various documents submitted at this login of the portal would be considered for all other Folio No/DPID & Client which has same Permanent Account Number (PAN) registered as per the information available with the depositories (NSDL/CDSL) or by the Registrar and Share Transfer Agent (KFin Technologies Private Limited).' At the bottom, there is a checkbox with the text 'I hereby validate the above-mentioned information and have made the necessary modifications wherever required, and I do hereby declare that to the best of my knowledge and belief what is stated above is correct, complete and is truly stated.' Below the checkbox are two buttons: 'SAVE' and 'CANCEL'.

Kindly note that the Folio No/DPID & Client and Permanent Account Number (PAN) displayed in profile are same which was used at the time of registration at the portal. The Tax forms or various documents submitted at this login of the portal would be considered for all other Folio No/DPID & Client which has same Permanent Account Number (PAN) registered as per the information available with the depositories (NSDL/CDSL) or by the Registrar and Share Transfer Agent (KFin Technologies Private Limited).

After verification and validation of information in the profile page and on clicking the save button, a message will appear that data saved successfully. See below image -

Profile

The company has considered the information available with the depository (NSDL/CDSL) as per the Registrar and Share Transfer Agent (STTA) Technologies Private Limited, as on the record date. We request you to kindly verify the correctness of the records and for any changes to update the same with your depository participant/ you hold shares in dematerialized mode/ as the Registrar and Share Transfer Agent/ if you hold shares in physical mode.

Personal Details

NAME

DOB

PAN & DEMAT A/C

Demat A/c details

DATA SAVED SUCCESSFULLY

OK

Dear Shareholder, The PAN Number & Demat and Permanent Account Number (PAN) displayed here are same which was used at the time of registration with the portal. The Tax forms or related documents submitted at this login of the portal should be considered for all other PAN, NSDL/ C & CDSL which has same Permanent Account Number (PAN) registered as per the information available with the depository (NSDL/CDSL) as per the Registrar and Share Transfer Agent (STTA) Technologies Private Limited.

I/ We hereby verify the above-mentioned information and have made the necessary modifications wherever required, and I do hereby declare that to the best of my knowledge and belief what is stated above is correct, complete and is truly stated.

SAVE

CANCEL

7. Submission & upload of documents?

Answer: After validation of profile information, shareholder will be directed to new page where they can submit eligible documents/declarations/forms as per their legal tax status.

Kindly note that the portal shall be available for the shareholder to submit the tax forms or various tax documents between June 1, 2020 to June 15, 2020. No tax forms or tax documents will be considered after June 15, 2020.

Documents/declarations/Forms can be uploaded/submitted the below section –

Things to do

Upload tax forms

A. Tax Documents for Resident Individual Shareholder – A resident individual can submit below forms (depending on the eligibility) as appearing into the upload tax forms

Things to do

Upload tax forms

Form 15G



Form 15H



Lower Tax Deduction Certificate (LTDC)



For queries

Please contact
dividend.tax@infosys.com

A.1. Form 15G – Applicable for a Resident Individual shareholder. Below fields need to filled in

Form 15G Any other

Assessment status as per
income tax act 1961

☐ assessed to tax under the Income-tax Act, 1961

Latest assessment year for which accessed

2020-2021



Estimated Income For
Declaration

Estimated Income For Declaration

Estimated Total Income Of F.Y.

Nature Of Income

Dividend

Section For Tax Deduction

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[FAQ](#)

[SignOut](#)

Details of other Form 15G
filed during the previous
year

Total No. Of Form 15G Filed

Aggregate Income

☐ I, [redacted] do hereby declare that to the best of my knowledge and belief what is stated above is correct, complete and is truly stated. I declare that the incomes referred to in this form are not includible in the total income of any other person under sections 60 to 64 of the Income-tax Act, 1961. I further declare that the tax on my estimated total income including income/ incomes referred to in this form and aggregate amount of income/incomes referred to in this form is computed in accordance with the provisions of the Income-tax Act, 1961, for the previous year ending on 31st March, 2021 relevant to the assessment year 2021-2022 will be nil. I also declare that my income/incomes referred to in this form and the aggregate amount of income/ incomes referred to in this form for the previous year ending on 31st March ,2021 relevant to the assessment year 2021-2022 will not exceed the maximum amount which is not chargeable to income-tax.

Once the above fields are filled, shareholder can verify/accept the form and submit by clicking on submit as shown below –

assessment year 2021-2022 will not exceed the maximum amount which is not chargeable to income-tax.

SUBMIT

CANCEL

Notes

- All the above fields are mandatory and needs to be filled in, without which the form cannot be submitted
- Declaration can be furnished by an individual under section 197A (1) in the financial year to which the income pertains.
- As per provisions of section 206A A (2), the declaration under section 197A (1) shall be invalid if the declarant fails to furnish his valid Permanent Account Number (PAN).
- Please mention the residential status as per the provisions of section 6 of the Income Tax Act, 1961.
- Please mention YES in Row "Whether assessed to tax under the Income-tax Act, 1961" if assessed to tax under the provisions of Income Tax Act, 1961 for any of the assessment year out of six assessment years preceding the year in which the declaration is filed.
- Please mention the amount of estimated total income of the previous year for which the declaration is filed including the amount of income for which this declaration is made in Row "If yes, latest assessment year for which assessed"
- In case any declaration(s) in Form No 15G is filed before filing this declaration during the previous year, mention the total number of such Form No 15G filed in Row "Details of Form No. 15G other than this form filed during the previous year, if any Total No. of Form No. 15G filed" along with the aggregate amount of income in Row "Aggregate amount of income for which Form No.15G filed" for which said declaration(s) have been filed.
- Before signing the declaration/verification, the declarant should satisfy himself that the information furnished in this form is true, correct and complete in all respects. Any person making a false statement in the declaration shall be liable to prosecution under section 277 of the Income Tax Act, 1961 and on conviction be punishable.
- In a case where tax sought to be avoided exceeds twenty five lakh rupees, with devious intent which shall not be less than six months, but which may extend to seven

Kindly note, an **individual shareholder**, who is a **resident** of India can submit Form 15G if:

- The person has a valid PAN
- Tax on estimated total income shall be **Nil** (including income for which declaration is made and incomes for which declarations given earlier to anybody for current financial year).
- Income for which declaration is being given and aggregate amount of incomes for which all declarations given earlier to anybody for current financial year under form 15G shall not exceed the **maximum amount not chargeable to tax** (i.e. Rs. 2,50,000).

A.2. Form 15H – Applicable for a Resident Individual shareholder who is of age sixty years or more at any time during the FY 2020-21. Below fields need to filled in –

Form 15H Any other

Assessment status as per
income tax act 1961

☐ assessed to tax under the Income-tax Act, 1961

Latest assessment year for which assessed

2020-2021



Estimated Income For
Declaration

Estimated Income For Declaration

Estimated Total Income Of F.Y.

[Profile](#)
[FAQ](#)
[SignOut](#)

Nature Of Income

Dividend

Section For Tax Deduction

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Details of other Form 15H filed during the previous year

Total No. Of Form 15H Filed

Aggregate Income

Date Of Birth

Once the above fields are filled, shareholder can verify/accept the form and submit by clicking on submit as shown below –

[Profile](#)
[FAQ](#)
[SignOut](#)

☐ I, do hereby declare that to the best of my knowledge and belief what is stated above is correct, complete and is truly stated. I declare that the incomes referred to in this form are not includible in the total income of any other person under sections 60 to 64 of the Income-tax Act, 1961. I further declare that the tax on my estimated total income including income/ incomes referred to in this form and aggregate amount of income/incomes referred to in this form is computed in accordance with the provisions of the Income-tax Act, 1961, for the previous year ending on 31st March, 2021 relevant to the assessment year 2021-2022 will be nil. I also declare that my income/incomes referred to in this form and the aggregate amount of income/ incomes referred to in this form for the previous year ending on 31st March ,2021 relevant to the assessment year 2021-2022 will not exceed the maximum amount which is not chargeable to income-tax.

SUBMIT


CANCEL

Notes

Kindly Note, an **individual shareholder**, who is a **resident** of India aged **60 years or more**, can submit Form 15H if:

- The person has a valid PAN
- Tax on estimated total income shall be **Nil** (including income for which declaration is made and incomes for which declarations was given earlier to anybody for current financial year).
- The total income is after allowing deduction under Chapter VIA deductions and / or after set off of losses under the head "House Property".

The above categories of shareholders can also submit any other documents (if eligible) under the tab “Any Other” as shown below. For this, shareholder have to attach the relevant documents under the tab browse. See snap below –



[Profile](#)[FAQ](#)[SignOut](#)

Form 15G

Any other

Document Type

Attach Document *

Browse...

☐ I hereby validate the above-mentioned information and have made the necessary modifications wherever required, and I do hereby declare that to the best of my knowledge and belief what is stated above is correct, complete and is truly stated.

SUBMIT

CANCEL

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A.3. Lower Tax Deduction Certificate (LTDC) – Shareholder can also submit LTDC if any obtained from Tax authority under the below tab. LTDC have to be attached under the tab browse. See image below

Lower Tax Deduction Certificate (LTDC)

Any other

Document Type

Attach Document *


Browse...

☐ I hereby validate the above-mentioned information and have made the necessary modifications wherever required, and I do hereby declare that to the best of my knowledge and belief what is stated above is correct, complete and is truly stated.

SUBMIT

CANCEL

B. Tax Documents for non- resident Shareholder – A non-resident individual can submit below forms/documents (depending on the eligibility) as appearing into the upload tax forms



ProfileFAQSignOut

ir Shareholder, Kindly note that the portal shall be available for the shareholder to submit the tax forms or various tax documents between Ji

Financial YearAssessment Year
2020-2021 ▼2021-2022

Things to do

Upload tax forms

- Lower Tax Deduction Certificate (LTDC) >
- Tax Residence Certificate (TRC) >
- Form 10F >
- Beneficial Ownership >
- No P.E declaration >


For queries

Please contact
dividend.tax@infosys.com

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The above tax forms, tax documents, tax declarations can be submitted by upload functionality wherein a non-resident shareholder can browse and attach the documents against the relevant tab. For e.g. to submit Tax Residency certificate (TRC), below upload function can be used –



ProfileFAQSignOut

Things to do

Upload tax forms

- Lower Tax Deduction Certificate (LTDC) >
- Tax Residence Certificate (TRC) >
- Form 10F >
- Beneficial Ownership >
- No P.E declaration >

For queries

Please contact
dividend.tax@infosys.com

Tax Residence Certificate (TRC)Any other

Document Type

Tax Residence Certificate (TRC)

Attach Document *

Browse...

After the applicable tax forms / tax documents/tax declarations, are uploaded, shareholder can submit by clicking on “SUBMIT” button. See image below

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[Profile](#)[FAQ](#)[SignOut](#)

Form 10F

Beneficial Ownership

No P.E declaration

Tax Residence Certificate (TRC)Any other

Document Type

Tax Residence Certificate (TRC)

Attach Document *

Browse...

☐ I hereby validate the above-mentioned information and have made the necessary modifications wherever required, and I do hereby declare that to the best of my knowledge and belief what is stated above is correct, complete and is truly stated.

SUBMIT

CANCEL

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