Applying for an IPO

Client Step-by-Step Guide

Wealth First Portfolio Managers Ltd.

Document	IPO Application — Step-by-Step Guide (UPI / ASBA)
Prepared by	Wealth First IT Team
Applicable to	Clients applying for IPOs through the Wealth First IPO portal
IPO portal	ipo.wealth-firstonline.com/wealthfirst
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About this guide

This guide explains how to apply for an IPO online through the Wealth First IPO portal. Applications are made using UPI (the ASBA process), so the bid amount is blocked in your bank account and debited only if shares are allotted. The whole process takes just a few minutes.

Follow the steps in order. The IPO bidding window is open from 10:00 AM to 5:00 PM on working days, and only UPI payments are supported for IPOs.

Before you begin — keep these ready

- Your Wealth First Trading Code / Client ID.
- Your registered mobile number — the login OTP is sent here by SMS.
- A UPI ID linked to a bank/app that supports UPI IPO (check the NPCI website for the current list).
- Enough funds in that account for the bid amount — the amount is blocked, not debited, until allotment.
- The IPO you want to apply for and your preferred number of lots (quantity).

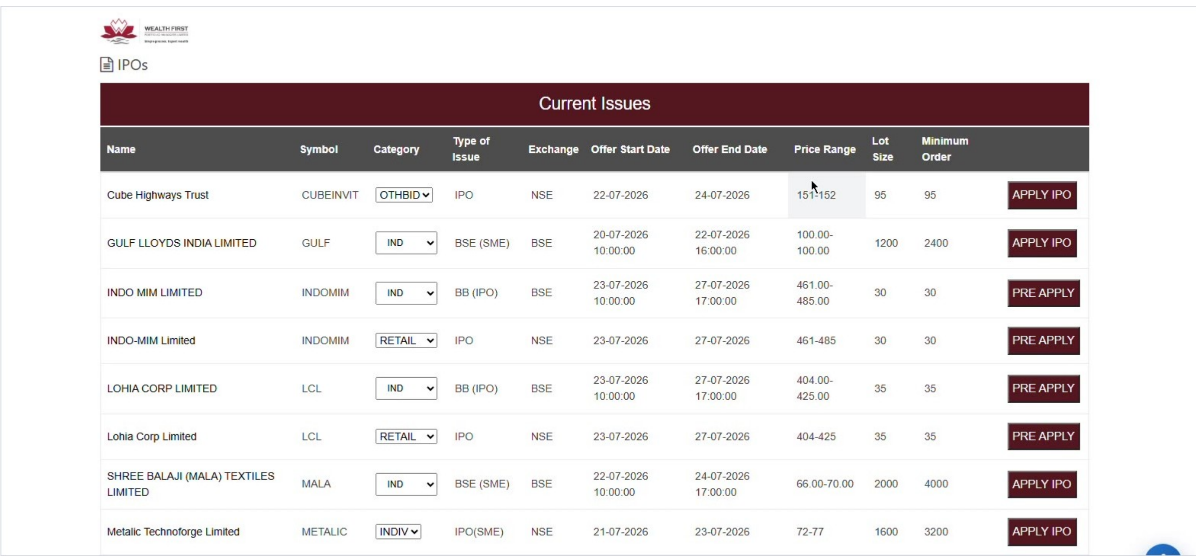
What you can do on this portal

- **Apply for an IPO** — place a bid in an open IPO issue
- **Pre-apply** — apply in advance for an upcoming IPO before it opens
- **Track your bids** — view your submitted bids, Bid ID and status
- **Modify or delete a bid** — change or withdraw a bid before the IPO closes

Please note: The IPO bidding window is 10:00 AM–5:00 PM on working days. Only UPI payments are supported. After submitting, you must approve the mandate request in your UPI app for the application to be valid.

Step 1 · Open the IPO portal & choose your IPO

- Go to ipo.wealth-firstonline.com/wealthfirst.
- The Current Issues list shows all open and upcoming IPOs with their category, exchange, offer dates, price range and lot size.
- Click APPLY IPO next to the IPO you want. To apply in advance for an issue that has not opened yet, click PRE APPLY.


IPOs

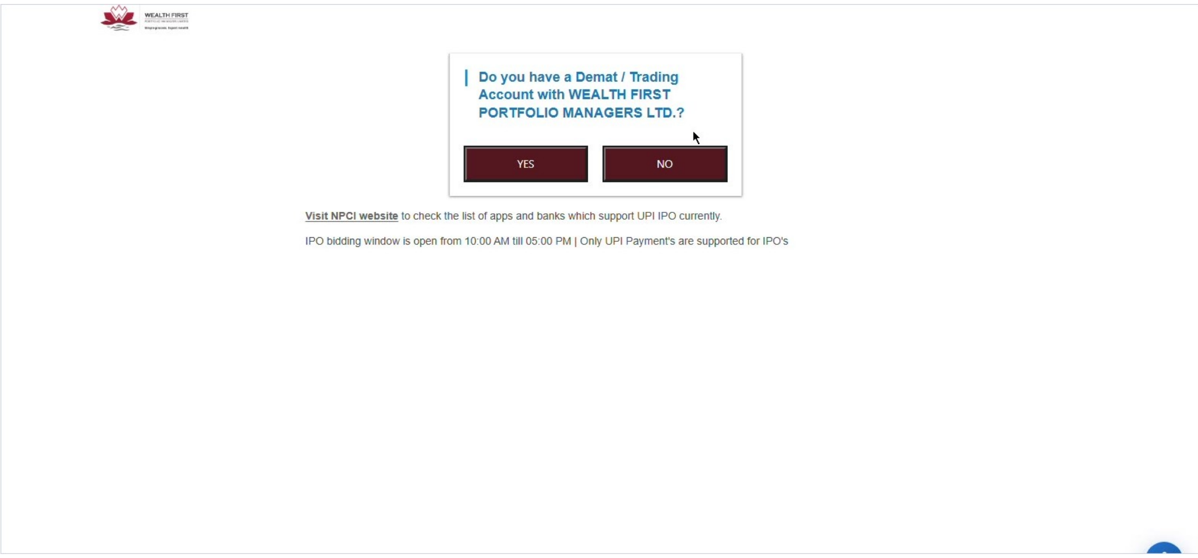
Current Issues

Name	Symbol	Category	Type of Issue	Exchange	Offer Start Date	Offer End Date	Price Range	Lot Size	Minimum Order	
Cube Highways Trust	CUBEINVIT	OTHBID	IPO	NSE	22-07-2026	24-07-2026	151-152	95	95	APPLY IPO
GULF LLOYDS INDIA LIMITED	GULF	IND	BSE (SME)	BSE	20-07-2026 10:00:00	22-07-2026 16:00:00	100.00-100.00	1200	2400	APPLY IPO
INDO MIM LIMITED	INDOMIM	IND	BB (IPO)	BSE	23-07-2026 10:00:00	27-07-2026 17:00:00	461.00-485.00	30	30	PRE APPLY
INDO-MIM Limited	INDOMIM	RETAIL	IPO	NSE	23-07-2026	27-07-2026	461-485	30	30	PRE APPLY
LOHIA CORP LIMITED	LCL	IND	BB (IPO)	BSE	23-07-2026 10:00:00	27-07-2026 17:00:00	404.00-425.00	35	35	PRE APPLY
Lohia Corp Limited	LCL	RETAIL	IPO	NSE	23-07-2026	27-07-2026	404-425	35	35	PRE APPLY
SHREE BALAJI (MALA) TEXTILES LIMITED	MALA	IND	BSE (SME)	BSE	22-07-2026 10:00:00	24-07-2026 17:00:00	66.00-70.00	2000	4000	APPLY IPO
Metalic Technoforge Limited	METALIC	INDIV	IPO(SME)	NSE	21-07-2026	23-07-2026	72-77	1600	3200	APPLY IPO

Current Issues — click APPLY IPO (or PRE APPLY) next to the IPO you want.

Step 2 · Confirm you are a Wealth First client

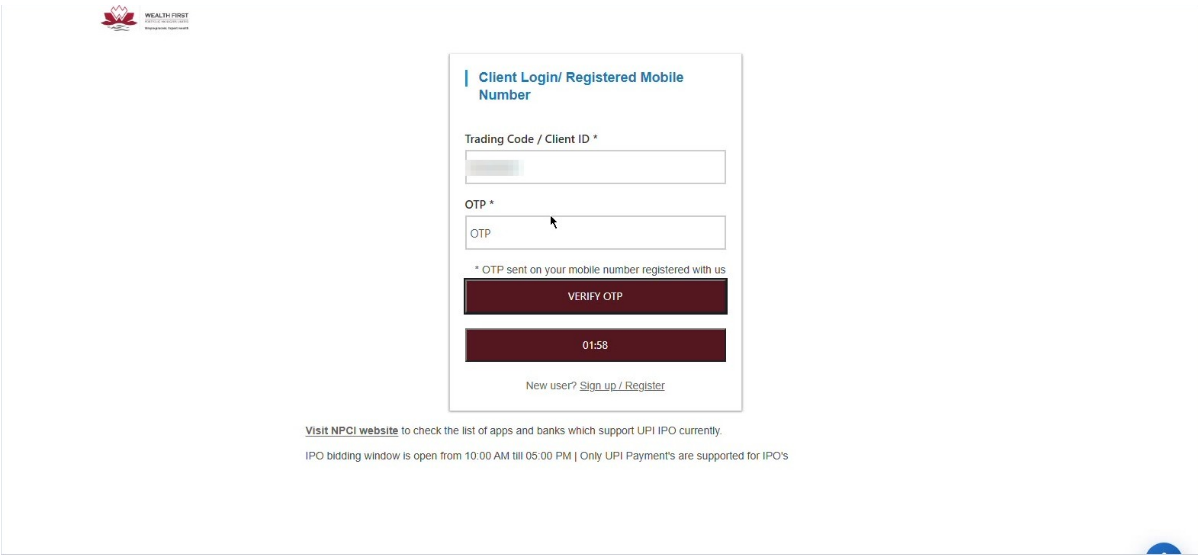
- You will be asked: “Do you have a Demat / Trading Account with Wealth First Portfolio Managers Ltd.?”
- Click YES if you are a Wealth First client.
- Choose NO only if you do not have a Wealth First account — you will then be taken to a New Registration form (Name, Email, Mobile, DP Name, PAN).



Confirm you have a Demat / Trading account with Wealth First — click YES.

Step 3 · Log in with your Client Code

- On the Client Login screen, enter your Trading Code / Client ID.
- Continue to request the OTP.



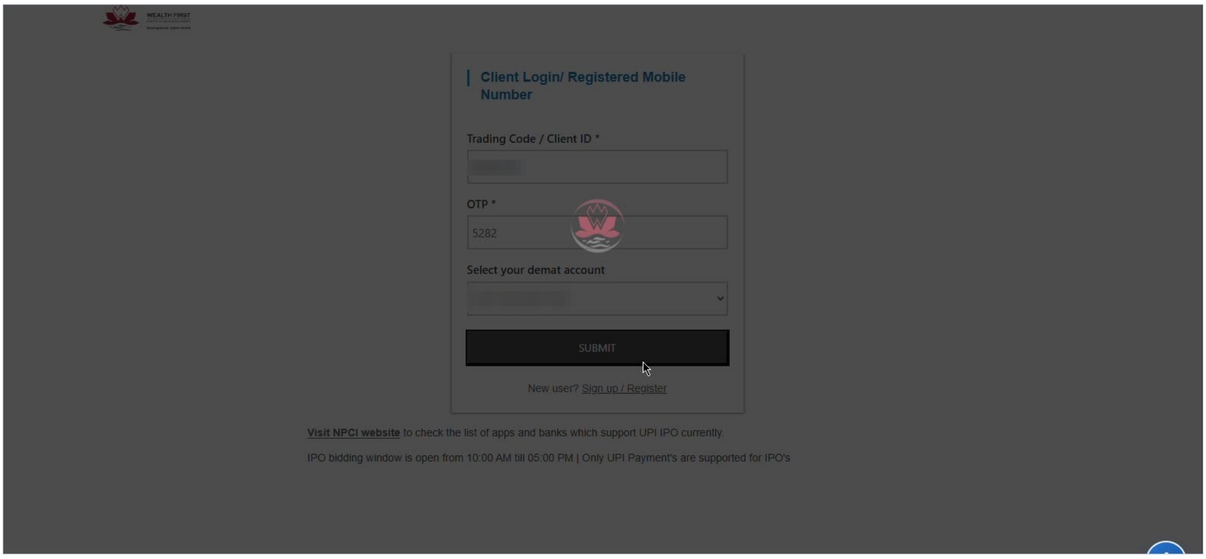
Client Login — enter your Trading Code / Client ID; the OTP is verified on the same screen.

Step 4 · Verify the OTP

- An OTP is sent by SMS to the mobile number registered with Wealth First.
- Enter the OTP and click VERIFY OTP before the on-screen timer runs out.
- Use the resend option if the OTP does not arrive.

Step 5 · Confirm your Client ID

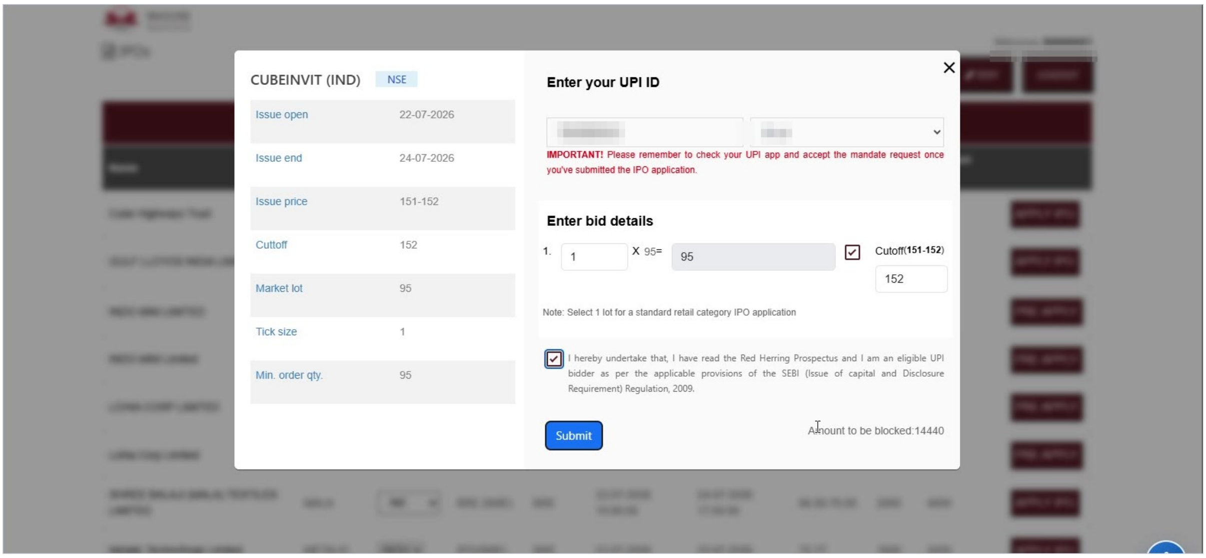
- The portal asks you to confirm your Client ID.
- Check that it is correct and confirm to proceed to the bid screen.



Confirm your Client ID and select your demat account to continue.

Step 6 · Enter your bid — UPI ID and lots

- The IPO details open in a popup — issue open / end dates, issue price band, market lot and minimum order quantity.
- Enter your UPI ID in the field provided.
- Select the quantity (number of lots) you want to apply for, at your chosen price within the band.
- You can apply for up to ₹5 lakh in a single IPO application via UPI — this is the maximum UPI mandate limit for IPOs.



Bid screen — enter your UPI ID and choose your lots. Note the reminder to approve the UPI mandate after submitting.

Step 7 · Accept the Terms & Conditions

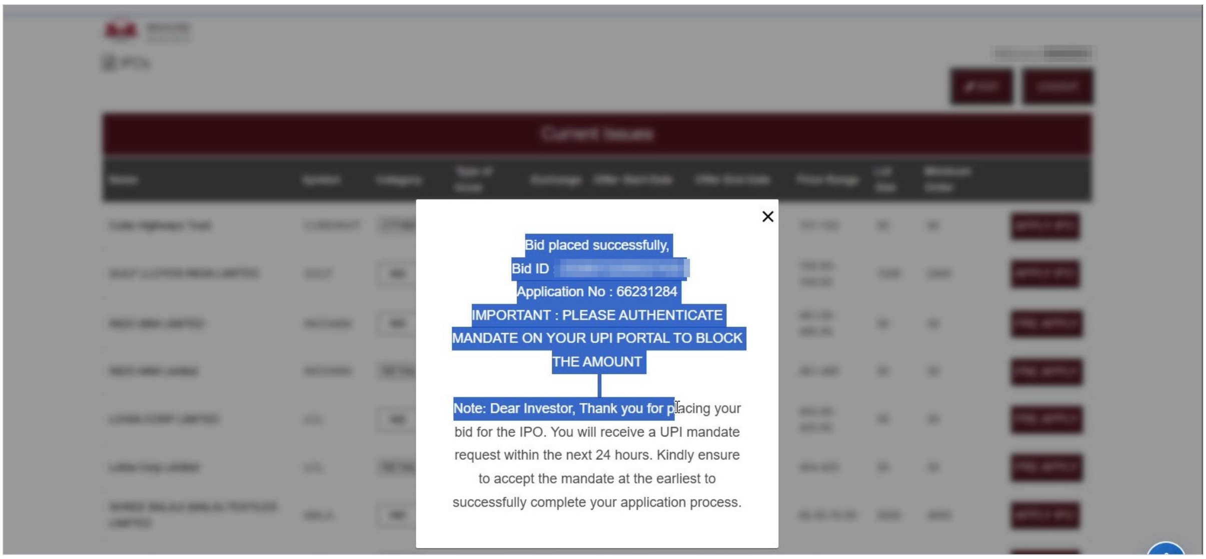
- Tick the Terms & Conditions checkbox to confirm you agree before submitting.

Step 8 · Submit your application

- Click Submit to place your IPO bid.

Step 9 · Note your Bid ID (confirmation)

- A confirmation popup shows your Bid ID — note it down for reference and for any later modification or query.
- During the bidding window (10:00 AM–5:00 PM on working days) the bid is placed immediately.
- If you apply outside these hours, the bid is submitted on the next working day.



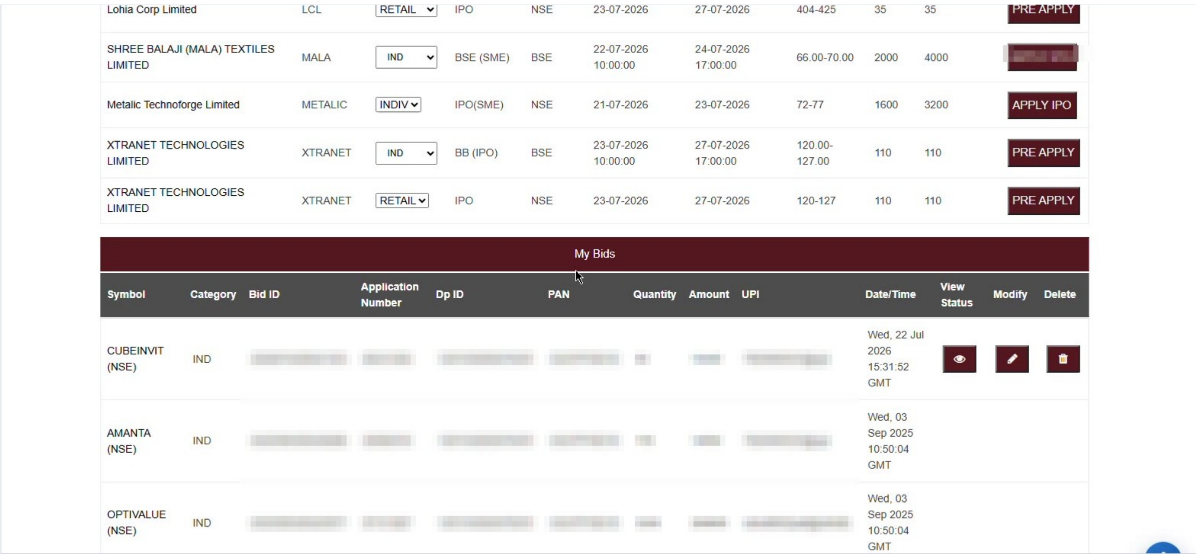
Bid placed successfully — note your Bid ID and remember to authenticate the mandate on your UPI app.

Step 10 · Approve the UPI mandate

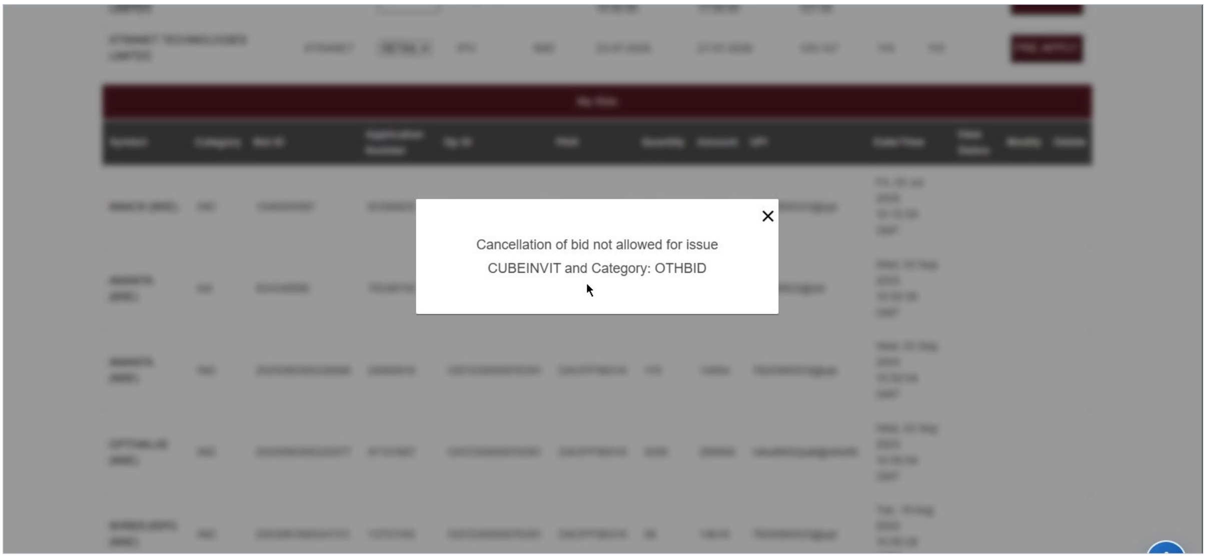
- Shortly after you submit, a mandate / collect request for the bid amount arrives in your UPI app.
- Open your UPI app and approve the mandate request.
- Keep sufficient funds in the linked account — the amount is blocked (not debited) until allotment. If the mandate is not approved, your application is not complete and will not be considered.

Step 11 · Track, modify or delete your bids

- The application / bid section of the portal lists your submitted bids with Category, Bid ID, Quantity, Amount, UPI, Date / Time and Status.
- You can Modify or Delete a bid before the IPO closes.
- Note: cancellation or modification may not be allowed for certain categories (for example, some non-retail / OTHBID categories).
- As per exchange rules, a bid of ₹2 lakh or more cannot be deleted (cancelled) once it is placed.



Your submitted bids — view Category, Bid ID, Amount, UPI, Date/Time and Status; Modify or Delete before the IPO closes.



Some categories do not allow cancellation of a placed bid.

Points to remember

- The IPO bidding window is 10:00 AM–5:00 PM on working days; only UPI payments are supported for IPOs.
- Use a UPI ID linked to a bank / app that supports UPI IPO — check the NPCI website for the current supported list.
- Keep enough funds in the linked account. The bid amount is blocked through the UPI mandate (ASBA) until allotment — it is not debited upfront.
- You can apply for up to ₹5 lakh in a single IPO application via UPI — this is the maximum UPI mandate limit for IPOs.
- Approve the UPI mandate promptly after submitting. An unapproved mandate makes the application invalid.
- Do not use the blocked funds elsewhere until allotment or refund is completed.
- Bids placed outside the bidding window are submitted on the next working day.
- You can modify or delete a bid before the IPO closes, but not after. Some categories do not allow cancellation.
- As per exchange rules, a bid of ₹2 lakh or more cannot be deleted once it is placed.
- Note your Bid ID — you will need it for any modification or query.
- Pre-apply lets you place a bid in advance; it is sent to the exchange when the IPO opens.
- Applying does not guarantee allotment — it depends on the level of subscription and the basis of allotment.

Need help?

If you face any issue while applying for an IPO, please contact your Relationship Manager at Wealth First Portfolio Managers Ltd., or write to us through www.wealth-firstonline.com. Please keep your Client Code and Bid ID ready when you reach out.

— Wealth First IT Team —