



# Guide to Download Capital Gain Statement from CAMS

India's Biggest Tax Platform

15,00,000  
Income Tax Filers

5,00,000  
Businesses

1,50,000  
Tax Consultants



# Introduction

Capital gains are profits one earns from the sale of assets such as stocks, mutual funds and real estate. The gains will be classified as short term or long term based on how long they have been held.

Instead of manually entering the details you can simply upload a “**Capital Gains / Loss Statement**” that is a consolidation of your investment performance, capital gains and income using CAMS for the current and last financial years.

This guide covers the step by step procedure to fetch this gain statement from the CAMS website and uploading the same on ClearTax.

# Process for CAMS Excel

**Step 1:** Go to <https://www.camsonline.com/Investors/Statements/Capital-Gain&Capital-Loss-statement>



← Back

 CAS - CAMS+ Kfintech	 CAS-CAMS
 Portfolio Valuation Statement	 Active Statement
 Single Folio Account Statement	 Capital Gain / Loss Statement
 Transaction Details Statement	 Grandfathered Statement for Equity

## Capital Gain / Loss Statement

The Capital Gain / Loss Statement provides one view of your investment performance across CAMS serviced Mutual Funds, for current and past Financial Years. The statement also provides details of your withdrawals from your fund account, summary of IDCW pay outs, as well as realised gains/losses on a FIFO (first-in-first-out) basis and segregated as long term and short term for equity and non-equity fund classes.

This statement may not reflect the complete information on your DEMAT holdings. Please check with your DP for details on DEMAT holdings.

Please fill the form below to receive your copy of the Capital Gain / Loss Statement via email.

<b>PERIOD</b>	<b>EMAIL*</b>
<input type="text" value="Current FY"/>	<input type="text" value="Email"/>
<b>PAN*</b>	<b>DELIVERY OPTION</b>
<input type="text" value="PAN"/>	<input type="text" value="Email a download link"/>
<b>MUTUAL FUND*</b>	<b>STATEMENT FORMAT*</b>
<input type="text"/>	<input type="text"/>

# Process for CAMS Excel

**Step 2:** In Period, select the Financial Year (FY) for which you want to file for.

### Capital Gain / Loss Statement

The Capital Gain / Loss Statement provides one view of your investment performance across CAMS serviced Mutual Funds, for current and past Financial Years. The statement also provides details of your withdrawals from your fund account, summary of IDCW pay outs, as well as realised gains/losses on a FIFO (first-in-first-out) basis and segregated as long term and short term for equity and non-equity fund classes.

This statement may not reflect the complete information on your DEMAT holdings. Please check with your DP for details on DEMAT holdings.

Please fill the form below to receive your copy of the Capital Gain / Loss Statement via email.

**PERIOD**

- Current FY
- Previous FY
- 2nd last FY
- 3rd last FY

**EMAIL\***

Email

**DELIVERY OPTION**

Email a download link

**STATEMENT FORMAT\***

PDF  Text  JSON  Excel

**PASSWORD\***

Password

**CONFIRM PASSWORD\***

Confirm Password

# Process for CAMS Excel

**Step 3:** Enter your personal **Email** address and **PAN**. The report will be sent to this email address.

## Capital Gain / Loss Statement

The Capital Gain / Loss Statement provides one view of your investment performance across CAMS serviced Mutual Funds, for current and past Financial Years. The statement also provides details of your withdrawals from your fund account, summary of IDCW pay outs, as well as realised gains/losses on a FIFO (first-in-first-out) basis and segregated as long term and short term for equity and non-equity fund classes.

This statement may not reflect the complete information on your DEMAT holdings. Please check with your DP for details on DEMAT holdings.

Please fill the form below to receive your copy of the Capital Gain / Loss Statement via email.

PERIOD	EMAIL*
<input type="text" value="Previous FY"/>	<input type="text"/>
PAN*	DELIVERY OPTION
<input type="text"/>	<input type="text" value="Email a download link"/>
MUTUAL FUND*	STATEMENT FORMAT*
<input type="text" value="Mutual Fund"/>	<input type="radio"/> PDF <input type="radio"/> Text <input type="radio"/> JSON <input checked="" type="radio"/> Excel
PASSWORD*	CONFIRM PASSWORD*
<input type="password" value="Password"/>	<input type="password" value="Confirm Password"/>
<input type="button" value="Submit"/>	<input type="button" value="Reset"/>

# Process for CAMS Excel

**Step 4:** From the Delivery option dropdown, select **Email an encrypted attachment**

## Capital Gain / Loss Statement

The Capital Gain / Loss Statement provides one view of your investment performance across CAMS serviced Mutual Funds, for current and past Financial Years. The statement also provides details of your withdrawals from your fund account, summary of IDCW pay outs, as well as realised gains/losses on a FIFO (first-in-first-out) basis and segregated as long term and short term for equity and non-equity fund classes.

This statement may not reflect the complete information on your DEMAT holdings. Please check with your DP for details on DEMAT holdings.

Please fill the form below to receive your copy of the Capital Gain / Loss Statement via email.

<b>PERIOD</b>	<b>EMAIL *</b>
<input type="text" value="Previous FY"/>	<input type="text"/>
<b>PAN *</b>	<input type="text" value="Email a download link"/> <input type="text" value="Email an encrypted attachment"/>
<b>MUTUAL FUND *</b>	<b>STATEMENT FORMAT *</b>
<input type="text" value="Mutual Fund"/>	<input type="radio"/> PDF <input type="radio"/> Text <input type="radio"/> JSON <input checked="" type="radio"/> Excel
<b>PASSWORD *</b> ⓘ	<b>CONFIRM PASSWORD *</b>
<input type="text" value="Password"/>	<input type="text" value="Confirm Password"/>

# Process for CAMS Excel

**Step 5 :** In the Mutual Fund dropdown, Select **All Mutual Funds**.

## Capital Gain / Loss Statement

The Capital Gain / Loss Statement provides one view of your investment performance across CAMS serviced Mutual Funds, for current and past Financial Years. The statement also provides details of your withdrawals from your fund account, summary of IDCW pay outs, as well as realised gains/losses on a FIFO (first-in-first-out) basis and segregated as long term and short term for equity and non-equity fund classes.

This statement may not reflect the complete information on your DEMAT holdings. Please check with your DP for details on DEMAT holdings.

Capital Gain / Loss Statement via email.

EMAIL \*

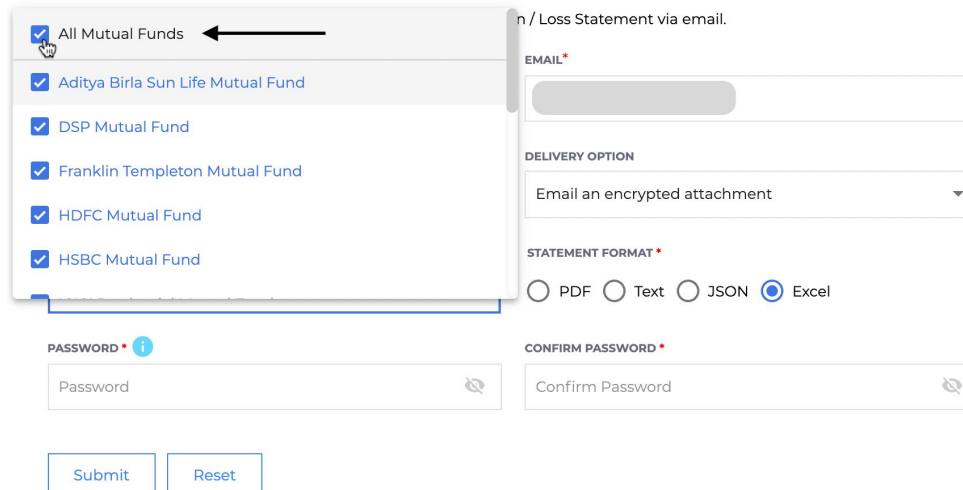
DELIVERY OPTION

STATEMENT FORMAT \*

PASSWORD \* ⓘ

CONFIRM PASSWORD \*

Submit Reset



The screenshot shows a web form for generating a Capital Gain / Loss Statement. A dropdown menu is open, showing a list of mutual funds with checkboxes. The 'All Mutual Funds' option is selected, indicated by a black arrow. Below the dropdown, there are radio buttons for 'PDF', 'Text', 'JSON', and 'Excel', with 'Excel' being the selected option. The form also includes an email input field, a delivery option dropdown (set to 'Email an encrypted attachment'), and password fields for 'PASSWORD' and 'CONFIRM PASSWORD'. At the bottom, there are 'Submit' and 'Reset' buttons.

# Process for CAMS Excel

## Step 6 : Under Statement Format, Select **Excel**.

### Capital Gain / Loss Statement

The Capital Gain / Loss Statement provides one view of your investment performance across CAMS serviced Mutual Funds, for current and past Financial Years. The statement also provides details of your withdrawals from your fund account, summary of IDCW pay outs, as well as realised gains/losses on a FIFO (first-in-first-out) basis and segregated as long term and short term for equity and non-equity fund classes.

This statement may not reflect the complete information on your DEMAT holdings. Please check with your DP for details on DEMAT holdings.

Please fill the form below to receive your copy of the Capital Gain / Loss Statement via email.

<b>PERIOD</b>	<b>EMAIL *</b>
<input type="text" value="Previous FY"/>	<input type="text"/>
<b>PAN *</b>	<b>DELIVERY OPTION</b>
<input type="text"/>	<input type="text" value="Email an encrypted attachment"/>
<b>MUTUAL FUND *</b>	<b>STATEMENT FORMAT *</b>
<input type="text" value="Aditya Birla Sun Life Mutual Fund, DSP Mutual Fund, F..."/>	<input type="radio"/> PDF <input type="radio"/> Text <input type="radio"/> JSON <input checked="" type="radio"/> Excel ←
<b>PASSWORD *</b> ⓘ	<b>CONFIRM PASSWORD *</b>
<input type="password" value="Password"/>	<input type="password" value="Confirm Password"/>



# Process for CAMS Excel

**Step 7 :** Enter a desired password in PASSWORD and CONFIRM PASSWORD fields. The capital gains report will be password protected with the password you enter here.

**Capital Gain / Loss Statement**

The Capital Gain / Loss Statement provides one view of your investment performance across CAMS serviced Mutual Funds, for current and past Financial Years. The statement also provides details of your withdrawals from your fund account, summary of IDCW pay outs, as well as realised gains/losses on a FIFO (first-in-first-out) basis and segregated as long term and short term for equity and non-equity fund classes.

This statement may not reflect the complete information on your DEMAT holdings. Please check with your DP for details on DEMAT holdings.

Please fill the form below to receive your copy of the Capital Gain / Loss Statement via email.

<b>PERIOD</b>	<b>EMAIL *</b>
<input type="text" value="Previous FY"/>	<input type="text"/>
<b>PAN *</b>	<b>DELIVERY OPTION</b>
<input type="text"/>	<input type="text" value="Email an encrypted attachment"/>
<b>MUTUAL FUND *</b>	<b>STATEMENT FORMAT *</b>
<input type="text" value="Aditya Birla Sun Life Mutual Fund, DSP Mutual Fund, F..."/>	<input type="radio"/> PDF <input type="radio"/> Text <input type="radio"/> JSON <input checked="" type="radio"/> Excel
<b>PASSWORD *</b> <span>1</span>	<b>CONFIRM PASSWORD *</b>
<input type="password"/>	<input type="password"/>

# Process for CAMS Excel

**Step 8 :** Click on **Submit**. You will receive your capital gain report on your personal email. Download the report.

**Capital Gain / Loss Statement**

The Capital Gain / Loss Statement provides one view of your investment performance across CAMS serviced Mutual Funds, for current and past Financial Years. The statement also provides details of your withdrawals from your fund account, summary of IDCW pay outs, as well as realised gains/losses on a FIFO (first-in-first-out) basis and segregated as long term and short term for equity and non-equity fund classes.

This statement may not reflect the complete information on your DEMAT holdings. Please check with your DP for details on DEMAT holdings.

Please fill the form below to receive your copy of the Capital Gain / Loss Statement via email.

PERIOD	EMAIL *
<input type="text" value="Previous FY"/>	<input type="text"/>
PAN *	DELIVERY OPTION
<input type="text"/>	<input type="text" value="Email an encrypted attachment"/>
MUTUAL FUND *	STATEMENT FORMAT *
<input type="text" value="Aditya Birla Sun Life Mutual Fund, DSP Mutual Fund, F..."/>	<input type="radio"/> PDF <input type="radio"/> Text <input type="radio"/> JSON <input checked="" type="radio"/> Excel
PASSWORD * ⓘ	CONFIRM PASSWORD *
<input type="password" value="....."/>	<input type="password" value="....."/>
<input type="button" value="Submit"/> <input type="button" value="Reset"/>	

# Process for CAMS Excel

**Step 9 :** We currently support .xlsx format, so when you download the file you open the file in Excel/Google Sheets and **Save as .xlsx.**

**Capital Gain / Loss Statement**

The Capital Gain / Loss Statement provides one view of your investment performance across CAMS serviced Mutual Funds, for current and past Financial Years. The statement also provides details of your withdrawals from your fund account, summary of IDCW pay outs, as well as realised gains/losses on a FIFO (first-in-first-out) basis and segregated as long term and short term for equity and non-equity fund classes.

This statement may not reflect the complete information on your DEMAT holdings. Please check with your DP for details on DEMAT holdings.

Please fill the form below to receive your copy of the Capital Gain / Loss Statement via email.

<b>PERIOD</b>	<b>EMAIL*</b>
Previous FY	
<b>PAN*</b>	<b>DELIVERY OPTION</b>
	Email an encrypted attachment
<b>MUTUAL FUND*</b>	<b>STATEMENT FORMAT*</b>
Aditya Birla Sun Life Mutual Fund, DSP Mutual Fund, F...	<input checked="" type="radio"/> PDF <input type="radio"/> Text <input type="radio"/> JSON <input type="radio"/> Excel
<b>PASSWORD*</b> ⓘ	<b>CONFIRM PASSWORD*</b>
.....	.....
<input type="button" value="Submit"/>	<input type="button" value="Reset"/>

# Process for CAMS Excel

**Step 10 :** Login into your cleartax account. Head over to **Income Sources** → **Capital Gains** and click on **Upload File**

cleartax

Working on: A.Y. 2021-2022   Need Help?   Buy Assisted Tax Filing Plan   My Account   Search

1. PERSONAL INFO   **2. INCOME SOURCES**   3. DEDUCTIONS   4. TAXES PAID   5. TAX FILING

A. SALARY   B. OTHER INCOME   C. HOUSE PROPERTY   **D. CAPITAL GAIN**   E. BUSINESS & PROFESSION

Go To Next >>

## Income From Capital Gains

Did you sell any asset (shares, property, house, land, building, etc) between the period of April 1, 2020 to March 31, 2021?

Note: Intra-day trading and F&O trading is considered as business income. Go to Business & Profession page and enter the data in the relevant fields.

### Capital gains Summary

Upload a capital gains report (generated by ZERODHA/CAMS/KARVY) or Add sale entries manually to view capital gains summary.

### Upload Capital Gains Report

Upload File

ClearTax supports import of capital gain transactions generated by ZERODHA/CAMS/KARVY.

If your brokerage or fund house is not supported, you can also import data in bulk using [ClearTax Excel template](#).

# Process for CAMS Excel

**Step 11:** From the dropdown under **Choose the Report provider**, select CAMS.

cleartax Working on: A.Y. 2021-2022 Need Help? Buy Assisted Tax Filing Plan Refer & Earn My Account Search

1. PERSONAL INFO **2. INCOME SOURCES** 3. DEDUCTIONS 4. TAXES PAID 5. TAX FILING

A. SALARY B. OTHER INCOME C. HOUSE PROPERTY **D. CAPITAL GAIN** E. BUSINESS & PROFESSION

## Upload your Capital Gains Report

Bulk upload your transactions data and auto-calculate your tax return. You can review & edit details as necessary later.

**Note:** The file names from multiple platforms have changed from last year. We recommend you to read the guide for the respective platform to upload the correct file.

**Choose the Report provider**

- ✓ Select report provider
- ClearTax Template
- CAMS excel**
- Karvy/KFintech excel
- Zerodha Tax P&L
- Upstox Tax Report
- ICICI Direct
- Groww
- Paytm Money
- ShareKhan
- 5Paisa

report / ClearTax Excel template to upload

document is password protected.

Back

**ClearTax supports import of following reports**

Source	Document Supported	Guide to download Report
ZERODHA#	Trade wise Tax P&L Report	<a href="#">Zerodha Guide</a>
CAMS	Capital Gains/Loss Statement	<a href="#">CAMS Guide</a>
Karvy/KFintech	Capital Gains/Loss Statement	<a href="#">KARVY Guide</a>
Upstox#	Tax Report	<a href="#">Upstox Guide</a>
Groww*	Capital Gains Report	<a href="#">Groww Guide</a>
ICICI Direct*	Capital Gains Report	<a href="#">ICICI Direct Guide</a>
Paytm Money#	Capital Gains Report	<a href="#">PaytmMoney_Guide</a>

# Process for CAMS Excel

**Step 12 :** After selecting CAMS, click on the “**Choose File**” button and select your Capital Gains report downloaded before.

The screenshot shows the ClearTax dashboard. At the top, there's a navigation bar with the ClearTax logo, 'Working on: A.Y. 2021-2022', and links for 'Need Help?', 'Buy Assisted Tax Filing Plan', 'Refer & Earn', and 'My Account'. A search bar is on the right. Below this is a progress bar with five main steps: 1. PERSONAL INFO, 2. INCOME SOURCES (highlighted in green), 3. DEDUCTIONS, 4. TAXES PAID, and 5. TAX FILING. Under step 2, there are five sub-categories: A. SALARY, B. OTHER INCOME, C. HOUSE PROPERTY, D. CAPITAL GAIN (highlighted with a blue bar), and E. BUSINESS & PROFESSION.

## Upload your Capital Gains Report

Bulk upload your transactions data and auto-calculate your tax return. You can review & edit details as necessary later.

**Note:** The file names from multiple platforms have changed from last year. We recommend you to read the guide for the respective platform to upload the correct file.

The screenshot shows the 'Upload your Capital Gains Report' form. It has a dropdown menu for 'Choose the Report provider' with 'CAMS excel' selected. Below it is a section 'Choose your capital gains report / ClearTax Excel template to upload' with a 'Choose file' button. A tooltip points to the button with the text 'Choose a capital gains report'. There is also a text input field for 'Enter Password (optional)' with a note 'Enter the password if your document is password protected.' At the bottom are 'Proceed' and 'Back' buttons.

**ClearTax supports import of following reports**

Source	Document Supported	Guide to download Report
ZERODHA#	Trade wise Tax P&L Report	<a href="#">Zerodha Guide</a>
CAMS	Capital Gains/Loss Statement	<a href="#">CAMS Guide</a>
Karvy/KFintech	Capital Gains/Loss Statement	<a href="#">KARVY Guide</a>
Upstox#	Tax Report	<a href="#">Upstox Guide</a>
Groww*	Capital Gains Report	<a href="#">Groww Guide</a>
ICICI Direct*	Capital Gains Report	<a href="#">ICICI Direct Guide</a>
Paytm Money#	Capital Gains Report	<a href="#">PaytmMoney Guide</a>

# Process for CAMS Excel

**Step 13 :** Enter the **Password** you chose for the report.

The screenshot shows the ClearTax dashboard with the following elements:

- Logo: **cleartax**
- Working on: A.Y. 2021-2022
- Need Help?
- Buy Assisted Tax Filing Plan
- Refer & Earn
- My Account
- Search [Q]
- Progress bar with steps: 1. PERSONAL INFO, 2. INCOME SOURCES (highlighted), 3. DEDUCTIONS, 4. TAXES PAID, 5. TAX FILING
- Sub-steps under Step 2: A. SALARY, B. OTHER INCOME, C. HOUSE PROPERTY, D. CAPITAL GAIN (highlighted), E. BUSINESS & PROFESSION

## Upload your Capital Gains Report

Bulk upload your transactions data and auto-calculate your tax return. You can review & edit details as necessary later.

**Note:** The file names from multiple platforms have changed from last year. We recommend you to read the guide for the respective platform to upload the correct file.

The screenshot shows the 'Upload your Capital Gains Report' form with the following elements:

- Choose the Report provider:** A dropdown menu with 'CAMS excel' selected.
- Choose your capital gains report / ClearTax Excel template to upload:** A 'Choose file' button and a file name 'Capital Gai...eport.xlsx'.
- Enter Password (optional):** A text input field with a password mask '.....' and a placeholder text 'Enter the password if your document is password protected.' An arrow points to the input field.
- Buttons:** 'Proceed' (green) and 'Back' (black).
- ClearTax supports import of following reports:** A table listing supported sources and their respective guides.

Source	Document Supported	Guide to download Report
ZERODHA#	Trade wise Tax P&L Report	<a href="#">Zerodha Guide</a>
CAMS	Capital Gains/Loss Statement	<a href="#">CAMS Guide</a>
Karvy/KFintech	Capital Gains/Loss Statement	<a href="#">KARVY Guide</a>
Upstox#	Tax Report	<a href="#">Upstox Guide</a>
Groww*	Capital Gains Report	<a href="#">Groww Guide</a>
ICICI Direct*	Capital Gains Report	<a href="#">ICICI Direct Guide</a>
Paytm Money#	Capital Gains Report	<a href="#">PaytmMoney Guide</a>

# Process for CAMS Excel

**Step 14 :** After selecting your report, click on the **Proceed** button and you're done! Cleartax will then read your report to automatically fill details of your capital gains.

The screenshot shows the ClearTax dashboard with the following elements:

- Logo: cleartax
- Working on: A.Y. 2021-2022
- Need Help? Buy Assisted Tax Filing Plan Refer & Earn My Account
- Search [Q]
- Progress bar with 5 steps: 1. PERSONAL INFO, 2. INCOME SOURCES (highlighted), 3. DEDUCTIONS, 4. TAXES PAID, 5. TAX FILING
- Sub-steps under '2. INCOME SOURCES': A. SALARY, B. OTHER INCOME, C. HOUSE PROPERTY, D. CAPITAL GAIN (highlighted), E. BUSINESS & PROFESSION

## Upload your Capital Gains Report

Bulk upload your transactions data and auto-calculate your tax return. You can review & edit details as necessary later.

**Note:** The file names from multiple platforms have changed from last year. We recommend you to read the guide for the respective platform to upload the correct file.

The screenshot shows the 'Upload your Capital Gains Report' form and a table of supported report providers.

**Form Fields:**

- Choose the Report provider: CAMS excel (dropdown)
- Choose your capital gains report / ClearTax Excel template to upload: Choose file Capital Gai...eport.xlsx
- Enter Password (optional): Enter the password if your document is password protected. (password field)
- Buttons: Proceed (highlighted), Back

**ClearTax supports import of following reports**

Source	Document Supported	Guide to download Report
ZERODHA#	Trade wise Tax P&L Report	<a href="#">Zerodha Guide</a>
CAMS	Capital Gains/Loss Statement	<a href="#">CAMS Guide</a>
Karvy/KFintech	Capital Gains/Loss Statement	<a href="#">KARVY Guide</a>
Upstox#	Tax Report	<a href="#">Upstox Guide</a>
Groww*	Capital Gains Report	<a href="#">Groww Guide</a>
ICICI Direct*	Capital Gains Report	<a href="#">ICICI Direct Guide</a>
Paytm Money#	Capital Gains Report	<a href="#">PaytmMoney Guide</a>