

# Migration guide

## Why this migration matters to you

We know migrations can feel like extra work, but this one is built to make your life easier. Everything now sits under the **Kotak Neo ecosystem** — no more juggling multiple platforms for docs, keys, or TOTP registration. You also get stronger security, faster performance, and simpler integrations that save time in the long run.

What you'll gain:

-  **Unified access** – One place for APIs, documentation, keys, and TOTP.
-  **Secure and compliant\*** – Static IPs whitelisting that can extend to family accounts.
-  **Lightning fast** – Order speed in **under 50ms** at scale.

Short migration, big payoff: **speed, reliability, and simplicity.**

*\*As per SEBI circular on 'Safer participation of retail investors in Algorithmic trading' dated Feb 4, 2025 and exchange wide subsequent notifications on implementation standards.*

---

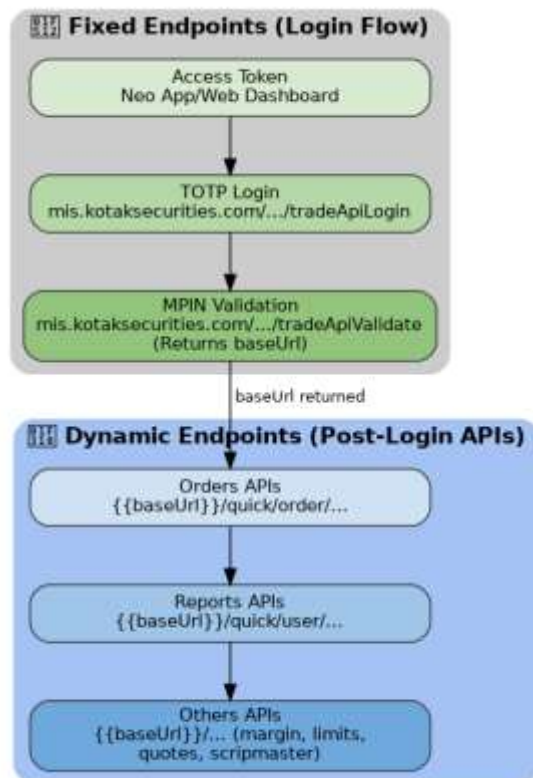
## Migration Timeline

- **Parallel Run:** Both versions will work together for **1 month**.
- **Deprecation:** On 1<sup>st</sup> Oct 2025, v1 APIs will be retired.

---

## Key Changes from integration point of view –

1. **Endpoints of all APIs are changing;** Login APIs have got completely new endpoints and order/reports/other APIs have become dynamic— i.e., they must be called using the `baseUrl` returned after MPIN validation.
2. **Bearer token** to be replaced with plain token (accessible from NEO app/web)
3. **TOTP based login** only valid login method. MPIN validation (2<sup>nd</sup> step of login process) now returns **baseUrl**



---

### 🔑 Step 1: Get Access Token

1. Login to **Neo app/web**.
2. Go to **Invest tab** → **TradeAPI card**.
3. Open **API Dashboard** and create an application (if not already done).
4. Copy your **Access Token**.
  - ⚠️ Old /oauth2/token and developer portal (napi.kotaksecurities.com) will be deprecated along with retirement of v1 APIs.

---

### 🕒 Step 2: Register TOTP

1. On **API Dashboard**, click **TOTP Registration**.
2. Verify with your **mobile number, OTP, and client code**.
3. **Scan QR code** with Google/Microsoft Authenticator.
4. Enter the generated **TOTP**.
5. Confirm **“TOTP successfully registered”**.
  - ⚠️ Old OTP login (/login/otp/generate) will be deprecated along with retirement of v1 APIs.

## API Change Log

| Category            | API             | Old (v1) endpoints                | New (v2) endpoints                                         | What You Need to Do                                                                   |
|---------------------|-----------------|-----------------------------------|------------------------------------------------------------|---------------------------------------------------------------------------------------|
| <b>Access Token</b> | Generate Token  | /oauth2/token                     | ✗ Deprecated                                               | Get token from Neo app/web dashboard.                                                 |
| <b>Login</b>        | OTP Login       | /login/1.0/login<br>/otp/generate | ✗ Deprecated                                               | Switch to TOTP login.                                                                 |
|                     | Login via TOTP  | /login/v6/totp/login              | https://mis.kotaksecurities.com/login/1.0/tradeApiLogin    | <b>Fixed endpoint.</b> Use plain token (no Bearer) in headers.                        |
|                     | MPIN Validation | /login/v6/totp/validate           | https://mis.kotaksecurities.com/login/1.0/tradeApiValidate | <b>Fixed endpoint.</b> Returns <b>baseUrl</b> → must use for remaining API endpoints. |
| <b>Orders</b>       | Place Order     | /Orders/2.0/.../place             | {{baseUrl}}/quick/order/rule/ms/place                      | Use baseUrl. Drop 'Authorization' in headers.                                         |
|                     | Modify Order    | /Orders/2.0/.../modify            | {{baseUrl}}/quick/order/vr/modify                          | Use baseUrl. Drop 'Authorization' in headers.                                         |
|                     | Cancel Order    | /Orders/2.0/.../cancel            | {{baseUrl}}/quick/order/cancel                             | Use baseUrl. Drop 'Authorization' in headers.                                         |
|                     | Exit Cover      | /Orders/2.0/.../co/exit           | {{baseUrl}}/quick/order/co/exit                            | Use baseUrl. Drop 'Authorization' in headers.                                         |
|                     | Exit Bracket    | /Orders/2.0/.../bo/exit           | {{baseUrl}}/quick/order/bo/exit                            | Use baseUrl. Drop 'Authorization' in headers.                                         |
| <b>Reports</b>      | Order History   | /Orders/2.0/.../history           | {{baseUrl}}/quick/order/history                            | Use baseUrl. Drop 'Authorization' in headers.                                         |
|                     | Order Book      | /Orders/2.0/.../orders            | {{baseUrl}}/quick/user/orders                              | Use baseUrl. Drop 'Authorization' in headers.                                         |
|                     | Trade Book      | /Orders/2.0/.../trades            | {{baseUrl}}/quick/user/trades                              | Use baseUrl. Drop 'Authorization' in headers.                                         |

|               |                    |                              |                                                        |                                                                                       |
|---------------|--------------------|------------------------------|--------------------------------------------------------|---------------------------------------------------------------------------------------|
|               | Position Book      | /Orders/2.0/.../positions    | {{baseUrl}}/quick/use/r/positions                      | Use baseUrl. Drop 'Authorization' in headers.                                         |
|               | Portfolio Holdings | /Portfolio/1.0/.../holdings  | {{baseUrl}}/portfolio/v1/holdings                      | Use baseUrl. Drop 'Authorization' in headers. <b>Response structure also changed.</b> |
| <b>Others</b> | Check Margin       | /Orders/2.0/.../check-margin | {{baseUrl}}/quick/use/r/check-margin                   | Use baseUrl. Drop 'Authorization' in headers.                                         |
|               | Limits             | /Orders/2.0/.../limits       | {{baseUrl}}/quick/use/r/limits                         | Use baseUrl. Drop 'Authorization' in headers.                                         |
|               | Quotes             | /apim/quotes/1.0/quotes      | {{baseUrl}}/script-details/1.0/quotes/                 | Use plain token in 'Authorization' header.                                            |
|               | Scripmaster Files  | /Files/1.0/.../file-paths    | {{baseUrl}}/script-details/1.0/masterscript/file-paths | Use plain token in 'Authorization' header.                                            |

We are also updating our T&C for the trade API usage. Refer [Link](#)

Download the postman collection of the new APIs. <link to be inserted>