CIMBBANK **CIMB**ISLAMIC

CIMB MyWealth User Guide

MOVING FORWARD WITH YOU

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Introduction

What is CIMB MyWealth Portal?

 CIMB MyWealth Portal is a Self-Serve Portal (SSP) where customer can view their current investment holdings through an informative dashboard, perform investment transactions and update their risk profile.



Investment Products

- Unit Trust (UT)
- Amanah Saham National Berhad (ASNB)

MyWealth Entry Point

MyWealth Entry Point



<u>Steps</u>

- Access to CIMB MyWealth via CIMB Clicks
- 2. Click on "**MyWealth**" in the side bar.

Entry Point For New Investors

Entry Point – New Investors

yWealth Dashboard		
MY OVERALL WEALTH WITH CIMB	Assets Liabilities	муг 0.00 Муг 0.00
Liabilities MYR 100,000.00 MY RISK PROFILE Balance Learn More	My Investment UNIT TRUST Your da not have Unit Trast account with CIMB yet.	Apply now
Product currently in MyWealth Unit Trust Amanah Saham Nasional Berhad Current & Savings Account Fixed Deposit Loan / Financing	AMANAH SAHAM NASIONAL BERHAD You don't have an ASNB account with us yet.	
	No Record Found You don't have a deposit account w	ith us yet,
	CIMB FIXED DEPOSIT Find our wide range of fixed deposit accounts to help you grow your mo	ney.

MyWealth Dashboard

- Upon redirected to MyWealth portal, you will land on MyWealth Dashboard.
- This dashboard shows your assets and liabilities.
- You can get an overview of the investment products offered through this portal.
- Customer may find 'Apply Now' button to proceed with Unit Trust (UT) account opening and 'Link Account' button to proceed with ASNB account linking.
- Customer may view and learn more about their risk profile as well as updating it when needed.

Unit Trust (For New Investors)

Unit Trust – Apply Now

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MY RISK PROFILE Balance Learn More	My Investment AMANAH SAHAM NASIONAL BERHAD 1803351902 assupported by PDD Assumptorted by PDD Assupported by PDD Assumptorted by PDD	Total Current Investment Value MYR 25,000.00 →
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	FCA SGD 1803351902 Liet updated en 68 Apr 2021 6:51:32 PM	Total Current Balance SGD 9,560.00 (MYR 30,000.00)
	CIMB FIXED DEPOSIT Find our wide range of fixed deposit accounts to help you grow your mean Apply now	9. Io

Click on "Get Started" to initiate your Unit Trust investment journey with CIMB MyWealth portal. = **MyWealth** Welcome to MyWealth Start investing in Unit Trust with 4 simple steps **Find Out Your Risk Profile** Select Investment Buka Akaun Unit Amanah Make Payment Answer some questions to Melabur berdasarkan peruntukan Open an account to start investing. Make payment for your understand your risk appetite and aset profil risiko anda atau pilih investments and start growing get investment recommendations! dana anda sendiri. your wealth! Get started Browse Unit Trust funds > All rights reserved. Copyright © 2024 CIMB Bank Berhad 197201001799

Click on "**Browse CIMB Unit Trust funds**" to find out more about the available funds offered in MyWealth portal.

Unit Trust – Risk Profile Assessment



Step 1: Risk Profiling

Customer may proceed to complete the first step of New Investor journey – the **Risk Profile Assessment**, to determine their risk profile category.

Unit Trust – Risk Profile Results

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		Ready to start	investing?
		Ready to start	Investing?

Risk Profile Results

- Discover your risk appetite which reflect your ability and desire to take on risk.
- Read more about how you should invest based on your risk profile category.

Risk Profile Comparison

• Customer may learn more about other risk profile categories and discover how they differ.

View My Investment Options

 Customer may click on the action button to proceed with browsing the available Unit Trust funds

Unit Trust – Select Investment



Step 2: Select Investment

 Proceed to the second step of New Investor journey – Select Investment.

Select your preferred way to start investing

- a. Guide Me: Exclusive to New Investor journey that includes asset class breakdowns as an investment guide for customer that needs guidance.
- **b.** Browse Funds: View more than 100 available Unit Trust funds in MyWealth portal and find funds that suit your risk appetite.

Unit Trust – Guide Me



Unit Trust – Account Opening



Unit Trust – Account Opening

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	All rights reserved. Copyright © 2024 CIMB Bank Bernad 197201001799		eg 601345678910.
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Step 5: Op	en Account	a month form a	Previous Next
Proceed stop of	d to the third New Investor		Aul rhyters reservers. [Doppright 82,202.4 CIMB Bank Bertrad 1072D1001799

Fill in the necessary information to complete your Unit Trust account opening.

Unit Trust – Confirm Purchase

Step 4: Confirm Purchase

- You may review the fund information and the amount input for purchase.
- Select payment account and ٠ approve transaction via SecureTAC.
- Go to UT Dashboard to first initial review your investment purchase.

Download Receipt

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in and understand the contents thereof;					Title		
Terms and Conditions Governing the Operation of the Unit Trust Account Services;	and Custodial				Name	Ali Amir bin Ahmad	
000 Customer Declaration;					Mykad / Passport nummer	***************************************	
(iv) Investor Suitability Assessment Declaration; (v) CIMB Group Privacy Notice; and					Date or Birth	11 June 1984	
(vi) Unit Trust Loan Financing Risk Disclosure Statement.	=		MyWealth		Email address.	aj******@gmail.com	
 The key contract terms affecting my obligations in relation to the unit trust turn affectively explained to me, and 	(\$) have been				Mailing address	No. 5 Block B, Jalan PJU 10/3C. Damansara Damai, 47820 Patalina Isua, Selangar	
3. CIVB may proceed to debit my Settlement Account for the purchase of the unit	Brust Aundris).	-				47630 Petaning Jaya, Selangor, Malaysia.	
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In the event a supplementary prospectus is bound, you will have the option to with application, provided that the issuance or transfer of units has not taken place.	draw your				office phone number		
if you have any concerns or enquiries on unit trust funds or if you are eligible for s	ech a wethdrawai.				Nationality	Malaysia	
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 A Fin, Jug (concerning) spage goals C 2020 Canton Saminard 19 2401020 rapp 					Sales charge (1.75%)	MYR 17.50	
					Amount	MYR 1,000.00	
					Total sales charges	MYR 17.50	
					Net investment amount	MYR 982.5.00	
					Total amount	MYR 1,000.00	

Customer may click on the 'Download Receipt' to download a copy of the transaction receipt for their safekeeping.

ASNB (New Investor)

Link ASNB Account

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MyWealth Dashboard		
MY OVERALL WEALTH WITH CIMB	Assets Liabilities	
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	CIMB FIXED DEPOSIT Find our wide range of fixes deposit accounts to help you grow your memory.	
	Apply now 🖄	

	×
	Link ASNB Account
	You're about to link your ASNB account in MyWealth platform.
	Please be informed that there are risks involved when conducting online transactions and you may opt to use other methods of transactions, i.e via ASNB branches or agents.
	Please ensure that you've agreed and accepted to the <u>Prospectus</u> & <u>ASNB</u> <u>Terms of Access</u> as specified on the ASNB website.
	Cancel Link account
Link ASNB Account (for 1 st time user in	n portal only)
• You are required to provide consent	to link their existing ASNB account(s)

• After clicking the 'Link Account' button, you are required to approve this activity *via* SecureTAC.

with CIMB MyWealth.

• You may view your ASNB account(s) and the corresponding investment holdings listed in MyWealth Dashboard.

MyWealth Dashboard (Existing Customer)

MyWealth Dashboard – Existing Investor

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			Unit Trust
MY OVERALL WEALTH WITH CIMB	Assets Liabilities	MYE 50,000.00	 Click on 'View Account' in Unit Trust Dashboard to manage Unit Trust funds
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MY RESK PROPILE Balance	My Investment UNIT TRUST	Total Current Investment Value @	Amanah Saham Nasional Berhad (ASNB)
Learn Mare Product currently in TyWealth	1803351902 Likespeland an CB Aug 1021 (551/3219) Sad protectiol by PDDs	MYR 25,000.00	Click on View Account in ASNB Dashboard to manage ASNB funds
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	All contra received Consulors 9:0104 CM48 Bank Bankad Internation		

Unit Trust Existing Customers

Unit Trust Dashboard



UT Dashboard – Existing Fund Top Up



My Holdings Tab

- This tab houses all of the existing funds that the customer is currently holding
- Customer may click on the fund to navigate to Fund
 Details Pop Up screen

UT Dashboard – Fund Details

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#### **View Fund Performance**

• Customer may refer to the graph for the fund performance based on 1-month or 3-month timelines.

#### **Download Fund Documents**

 Customer may view the information of the fund and download the fund documents for their own reference

## **UT Dashboard – Checkout Summary**



#### **Payment Account**

- Click on the drop down to select the settlement account that you prefer.
- The settlement account must be a single account, joint-or account, active account, and with sufficient balance to proceed with investment.



#### SecureTac Approval

- When you click on 'Proceed' button, you will be redirected to SecureTAC Approval page.
- You are required to approve/reject the SecureTAC *via* CIMB OCTO mobile app.

# **UT Dashboard – Receipt**



All Lights reserved. Copyright © 2024 CIMB Bank Berhad 137201001799

### **UT Dashboard – Transaction History**

Unit Trust Dashboard		
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#### **Transaction History**

- Click on the "Transaction History tab" to view the status of fund transaction submitted.
- New fund transaction status will be updated in the portal at least 3 working days.
- Can view up to 90 days transaction history.

# ASNB Existing Investor

# **ASNB Dashboard**

### Web Browser

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### **ASNB** Account

- You may switch the viewing from Principal Account to Minor Account.
- The nominee of ASNB Minor Account is those who is under the age of 18 years old and is under the Guardianship of the Principal Account holder.

### **Current Investment Value**

 Consist of the investment value for Principal account only, not including Minor account.

### My Fund Tab

- ASNB Funds can be categorized into Fixed Price Funds & Variable Price Funds
- Expand each fund to view fund details, for example UBB (*Unit Boleh Beli*) and UBC (*Unit Boleh Cagar*), Current Value for ASB and ASB 2 funds.

# **ASNB Dashboard – Fund Details**



### **Fund Transaction History**

- You may view up to 5 latest cash transaction history
- New fund transaction status will be updated in the portal at least 3 working days.

## **ASNB Dashboard – PNB Website**



### **View Fund Price**

https://www.asnb.com.my/dpv2_th edisplay-tv_EN.php



https://www.asnb.com.my/asn bv2_2funds_EN.php#prospek tusphs

## **ASNB Dashboard – Delink ASNB Account**

### Web Browser



# **ASNB Subscription (Top up)**

### Web Browser

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### Subscription (Top up)

- You may top up their existing funds by clicking on the corresponding fund to expand it.
- You can only purchase one fund at a time per transaction.
- Minimum amount for top up is MYR 1.
- Maximum amount for investment is MYR 50,000 per day.

# **ASNB Subscription – Checkout**

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#### **Checkout Page**

 Checkout page for Subscription to Own & Minor account, Subscription to Favorite account, and Add New Investment for Principal & Minor account are the same

### **Payment Account**

- Click on the drop down to select the settlement account that you prefer.
- The settlement account must be a single account, joint or account, active account, and with sufficient balance to proceed with investment.



#### SecureTac Approval

- When you click on '**Proceed**' button, you will be redirected to SecureTAC Approval page.
- You are required to approve/reject the SecureTAC via CIMB OCTO mobile app.

# **ASNB Subscription – Receipt**



## **ASNB Subscription – PDF Receipt**



#### **PDF Receipt**

• You can save a copy of transaction summary in the receipt for their safekeeping.

### **ASNB Add New Investment**

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### **Available Fund**

- You may purchase new funds by clicking "Browse More Funds"
- Minimum amount for new investment is MYR10.



- Navigate to 'Favourites' tab
- Click on 'Add New Favourite'

=	MyWealth		
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■ MyWealth

## SecureTAC Approval Do not close or refresh. Transaction will expire in 48 seconds. Cancel

#### How to approve transaction with SecureTAC?

#### **Via Push Notification**

1. Tap on the push notification on your **Mobile** 2. Tap "Approve"

#### Via CIMB Octo App menu

Open and login your CIMB Octo App
 Tap "SecureTAC" menu
 Tap "Approve"

#### For seamless approval, enable push notifications to receive SecureTAC:

IOS: Go to Settings > Notifications > CIMB Octo > Turn on Allow Notifications Android: Go to Settings > Notifications > App Notications > CIMB Octo > Turn on Allow Notifications Huawei: Go to Settings > Notifications > Manage All > CIMB Octo > Allow Notifications



#### SecureTac Approval

- When you click on 'Proceed' button, customer is redirected to SecureTAC Approval page.
- You are required to approve/reject the SecureTAC *via* CIMB OCTO mobile app.

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Nickname	Ar Raudhah Aminuddin	
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### Summary Page

- You may review all of the information to ensure accuracy
- You may click on 'Confirm and Proceed' button when all information is correct

■ MyWealth SecureTAC Approval Do not close or refresh. Transaction will expire in 48 seconds. Cancel

#### How to approve transaction with SecureTAC?

#### **Via Push Notification**

1. Tap on the push notification on your **Mobile** 2. Tap "Approve"

#### Via CIMB Octo App menu

1. Open and login your CIMB Octo App 2. Tap "SecureTAC" menu 3. Tap "Approve"

#### For seamless approval, enable push notifications to receive SecureTAC:

IOS: Go to Settings > Notifications > CIMB Octo > Turn on Allow Notifications Android: Go to Settings > Notifications > App Notications > CIMB Octo > Turn on Allow Notifications Huawei: Go to Settings > Notifications > Manage All > CIMB Octo > Allow Notifications



#### SecureTac Approval

- When you click on 'Proceed' button, customer is redirected to SecureTAC Approval page.
- You are required to approve/reject the SecureTAC *via* CIMB OCTO mobile app.

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	Transaction Details	~	
	Bank reference number	Ref 7000149	
	Transfer to	Ar Raudhah binti Aminuddin	
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	ID number	XXXXXX-XX-9909	
	Relationship	Friend/Acquaintance	
	Reason	Savings	
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	Fund name	AMANAH SAHAM BUMIPUTERA	
	Fund type	Fixed Price	
	Units alloted	1,000.00	
	NAV price	MYR 1.0000	PDF
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### PDF Receipt

- You can save a copy of transaction summary in the receipt for their safekeeping.
- The receipt format is the same for BOTH in Web Browser and OCTO mobile app

## **ASNB AMLA Requirement**

### Subscription/Add New Investment for Principal/Minor Account

Risk Status	Amount	Input
Empty/Low/Medium/	≥RM 25K	SOF
High Complete	<rm 25k<="" td=""><td>No additional input</td></rm>	No additional input
High Incomplete	≥RM 1	SOF & SOW

×	
former of French	Source of Funds
Source of Funds	Select source of funds
Select source of funds	Source of Wealth
	Select source of wealth
Cancel Continue	
	Cancel Continue

# MyWealth Manager Approval via CIMB Clicks

### **MyWealth Manager Customer Approval Process**



#### **Transaction Type**

- 1. Risk Profile Update
- 2. New Account Opening
- 3. Subscription
- 4. Switching
- 5. Redemption

### **Customer Review Approval Flow**





#### PENDING

Relationship Manager requires approval for your Purchase request (REF 7000149) [04 SEP.2022 10:30AM

#### PENDING

Relationship Manager requires approval for your Switch request [REF 7000149][04 SEP 2022 10:306M

#### PENDING

Relationship Manager requires approval for Redemption request (REF 7000149)(04 SEP 2022 10:30AM

5

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**Step 2**: Review the list of pending approvals and click on the item to review the details.



**Step 3:** On the details page, review and "Approve' the application

## **Logout Screen**



#### Logout screen

• Can view the summary of transactions performed in CIMB MyWealth

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**Thank You!**