

CIMB MyWealth User Guide

MOVING FORWARD WITH YOU



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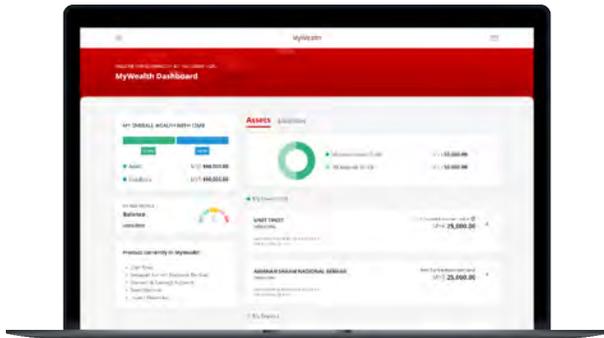
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Introduction

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.



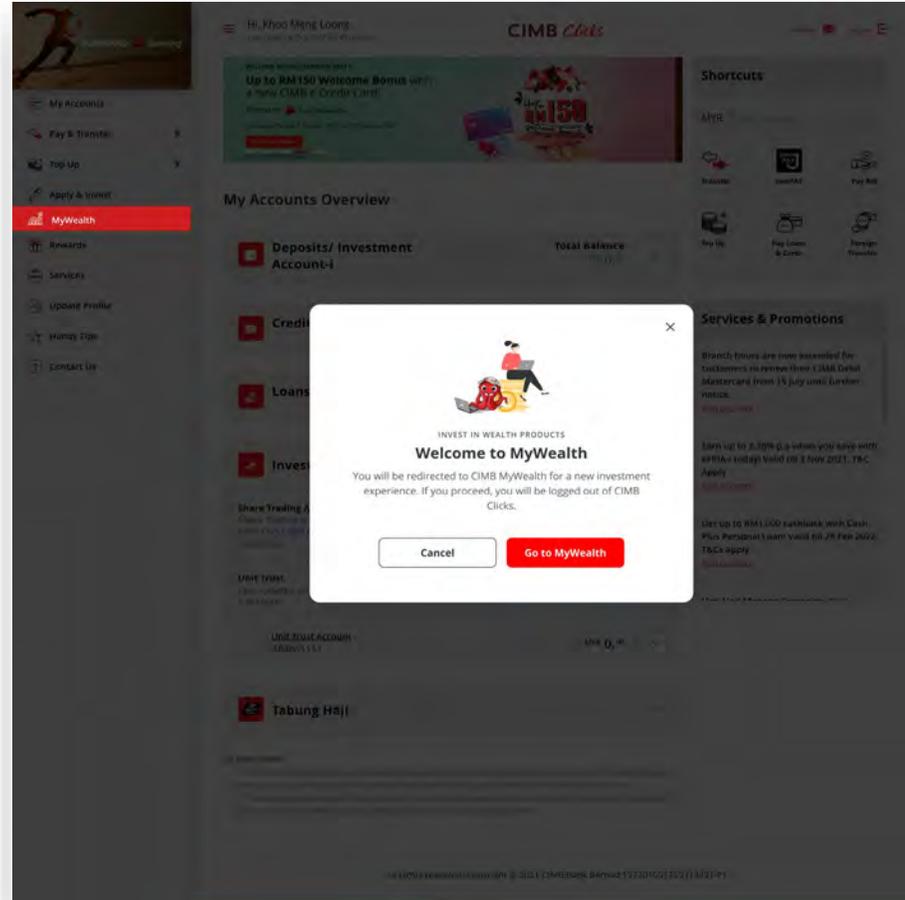
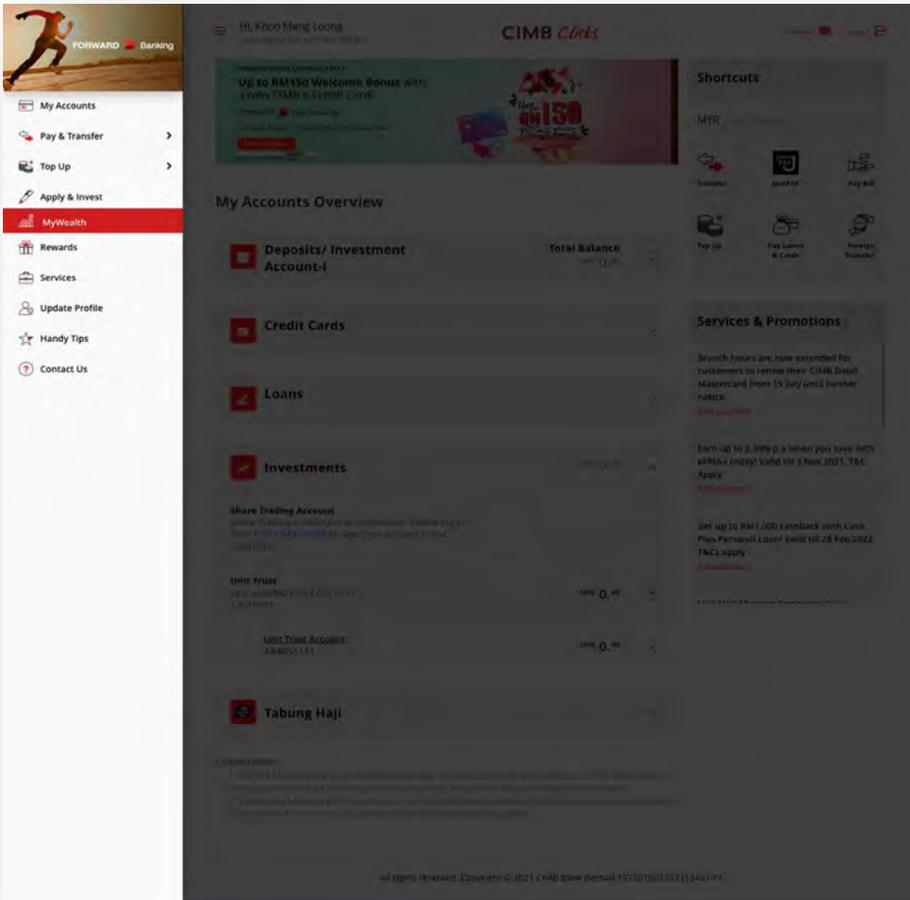
Investment Products

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



MyWealth Entry Point

MyWealth Entry Point



Steps

1. Access to CIMB MyWealth via CIMB Clicks
2. Click on “MyWealth” in the side bar.



Entry Point For New Investors

Entry Point – New Investors

The screenshot displays the MyWealth Dashboard for a user named Ahmad Aminuddin Bin Aminuddin Nazri. The dashboard is divided into several sections:

- MY OVERALL WEALTH WITH CIMB:** A progress bar shows 100.0% completion. Below it, a table lists Asset (MYR 0.00) and Liabilities (MYR 100,000.00).
- MY RISK PROFILE:** A gauge chart shows a 'Balance' risk level with a 'Learn More' link.
- Product currently in MyWealth:** A list of products including Unit Trust, Amanah Saham Nasional Berhad, Current & Savings Account, Fixed Deposit, and Loan / Financing.
- Assets and Liabilities:** A donut chart shows My Investment (0.0%, MYR 0.00) and My Deposit (0.0%, MYR 0.00).
- UNIT TRUST:** A section stating 'You do not have Unit Trust account with CIMB yet.' with an 'Apply now' button circled in green.
- AMANAH SAHAM NASIONAL BERHAD:** A section stating 'You don't have an ASNB account with us yet.' with a 'Link Account' button circled in green.
- My Deposit:** A section with a 'No Record Found' message and a note 'You don't have a deposit account with us yet.'
- CIMB FIXED DEPOSIT:** A green banner at the bottom with the text 'Find our wide range of fixed deposit accounts to help you grow your money.' and an 'Apply now' button.

At the bottom of the page, there is a footer: 'All rights reserved. Copyright © 2024 CIMB Bank Berhad 197201001799'.

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.

The background features a white central area with geometric shapes in red and grey. On the left, there is a photograph of a modern building's facade with a grid of windows and a bright light source. Thin red lines cross the white area diagonally.

Unit Trust (For New Investors)

Unit Trust – Apply Now

WELCOME, AHMAD AMINUDDIN BIN AMINUDDIN NAZRI
MyWealth Dashboard

MY OVERALL WEALTH WITH CIMB

Asset	MYR 100,000.00
Liabilities	MYR 100,000.00

Assets | Liabilities

My Investment 50.0% MYR 50,000.00
My Deposit 50.0% MYR 50,000.00

MY RISK PROFILE
Balance
Learn More

Product currently in MyWealth

- Unit Trust
- Amanah Saham Nasional Berhad
- Current & Savings Account
- Fixed Deposit
- Loan / Financing

AMANAH SAHAM NASIONAL BERHAD
1803351902
Total Current Investment Value
MYR 25,000.00
Last updated on 08 Apr 2021 6:51:32 PM
Not protected by IRDM

UNIT TRUST
You don't have a Unit Trust account with us yet.
[Apply now](#)

My Deposit

CURRENT ACCOUNT-I
1803351902
Total Current Balance
MYR 10,000.00
Last updated on 08 Apr 2021 6:51:32 PM

SA STATEMENT ACCOUNT
1803351902
Total Current Balance
MYR 10,000.00
Last updated on 08 Apr 2021 6:51:32 PM

FIXED RETURN INCOME ACCOUNT-I
1803351902
Total Current Balance
MYR 30,000.00
Last updated on 08 Apr 2021 6:51:32 PM

FCA SGD
1803351902
Total Current Balance
SGD 9,560.00
(MYR 30,000.00)
Last updated on 08 Apr 2021 6:51:32 PM

CIMB FIXED DEPOSIT
Find our wide range of fixed deposit accounts to help you grow your money.
[Apply now](#)

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Click on **“Get Started”** to initiate your Unit Trust investment journey with CIMB MyWealth portal.

WELCOME TO MYWEALTH

Start investing in Unit Trust with 4 simple steps

- 1 Find Out Your Risk Profile**
Answer some questions to understand your risk appetite and get investment recommendations!
- 2 Select Investment**
Melabur berdasarkan peruntukan aset profil risiko anda atau pilih dana anda sendiri.
- 3 Buka Akaun Unit Amanah**
Open an account to start investing.
- 4 Make Payment**
Make payment for your investments and start growing your wealth!

[Get started](#)

[Browse Unit Trust funds >](#)

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

Unit Trust – Risk Profile Assessment

MyWealth

← Back

Risk Profiling

Risk Profile Select Investment Open Account Confirm Purchase

Question 1 of 10

My highest education level is:

Primary

Secondary

Diploma/Pre-University

University/Post-Grad/Professional

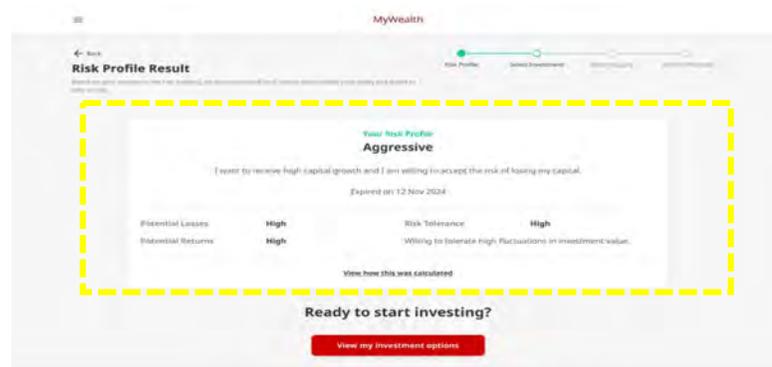
Next

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Step 1: Risk Profiling

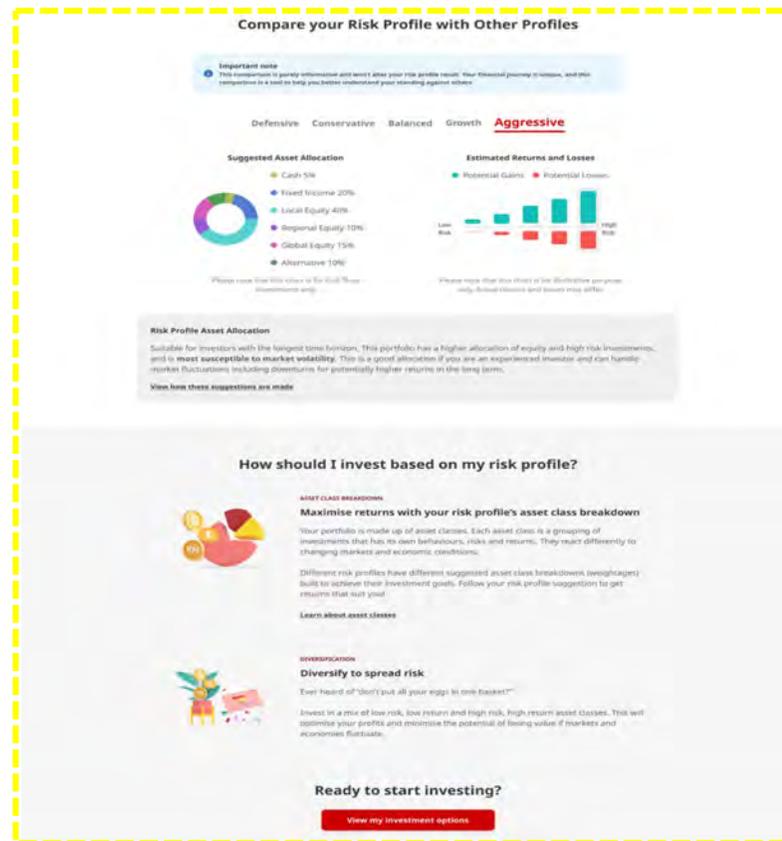
- Customer may proceed to complete the first step of New Investor journey – the **Risk Profile Assessment**, to determine their risk profile category.

Unit Trust – Risk Profile Results



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

MyWealth

← Back

Select Investment

Risk Profiling Select Investment Open Account Confirm Purchase

Choose how you like to invest

Guide me

Start investing based on your risk profile asset allocation.

- ✓ Suitable for investors who need guidance
- ✓ See asset class breakdowns as an investment guide
- ✓ View offerings from CIMB Focus Funds and find other funds according to your preference.

Start Investing

Browse Funds

Search for funds and put together your own investment with total freedom.

- ✓ Suitable for experienced investors
- ✓ View over 100 available funds including CIMB Focus Funds
- ✓ Search, sort and filter to find funds according to your preference

Browse Now

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Step 2: Select Investment

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

Select your preferred way to start investing

- Guide Me:** Exclusive to New Investor journey that includes asset class breakdowns as an investment guide for customer that needs guidance.
- 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

MyWealth

← Back

Guide Me

Risk Profiling | Select Investment | Open Account | Confirm Purchase

Your Risk Profile
Aggressive

You may follow the recommended asset class allocation percentage based on your risk profile, or you can decide to invest based on your own allocation. Happy investing!

Asset Class Allocation:

- Cash 5%
- Fixed Income 20%
- Local Equity 40%
- Regional Equity 10%
- Global Equity 15%
- Alternative 10%

Cash | Fixed Income | Local Equity | Regional Equity | Global Equity | Alternative

Fund Name	Risk Profile	Shariah Status	NAV Price	Performance (Past 1-mth)	Performance (Past 3-mth)
PRINCIPAL ISLAMIC ASIA PASIFIC DYNAMIK EQUITY	Aggressive	Shariah Compliant	MYR 0.650000 (As of 22 Aug 2022)	0.59%	3.59%
AFFIN HWANG SHARIAH GOLD TRACKER	Aggressive	Wholesale Fund	MYR 0.650000 (As of 22 Aug 2022)	0.59%	3.59%
RHB ASIAN INCOME	Aggressive	ESG Fund	MYR 0.650000 (As of 22 Aug 2022)	0.59%	3.59%

[View More](#)

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- Select your desired funds based on the suggested asset class breakdowns as an investment guide in **Guide Me To Invest** page.

- Click on a specific fund to view the Fund Details and Fund Documents – you can download those documents for reference.

- Fund Details will pop up where you may read further information on the fund and input the amount to purchase the fund.

Unit Trust – Account Opening

Fund Details

PRINCIPAL ASIA PACIFIC DYNAMIC GROWTH FUND (MYR CLASS)

Past 1-mth Performance: **3.59%** | Past 3-mth Performance: **6.59%** | NAV Price: **MYR 5,251.49** (as of 1 Sep 2023)

1-mth: **3-mth**

NAV Price (MYR)

100,900,000
100,850,000
100,800,000
100,750,000
100,700,000

22 Jan 24 Jan 26 Jan 28 Jan 30 Jan 02 Feb 04 Feb 06 Feb 08 Feb 10 Feb 12 Feb 14 Feb 16 Feb 18 Feb 20 Feb

6 Jul 100.500000

Disclaimer: Past performance of a fund is not an indicator of its future performance.

Risk Category	Asset Class	Shariah Compliant
Aggressive	Local Equity	Yes

Fund Documents

Master Prospectus	Download	Semi-Annual Report	Download
Fact Sheet	Download	Product Highlight Sheet	Download
Annual Report	Download	Supplementary Prospectus - 9 Doc...	Download

Disclaimer

Note: Any information that falls outside of this section of Fund Documents does not form part of the electronic prospectus and this unit trust fund is offered solely on the basis of the information contained in the prospectus in this section. Disclaimer: ©...
[View more](#)

Purchase Amount:

MYR 1,000.00

Purchase Now

Open Unit Trust Account

We noticed you don't have a Unit Trust account with us yet. Complete your account opening to proceed with checkout.

Cancel **Continue**

Step 3: Open Account

- Upon clicking '**Purchase Now**' button, you will proceed with the next step of Unit Trust account opening.

Unit Trust – Account Opening

MyWealth

Account Opening

Personal Details

Title (optional)
Select title

Name
Ali Amir bin Ahmad

Mykad / Passport Number
840611-11-3477

Date of Birth
11 June 1984

Next

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Step 3: Open Account

- Proceed to the third step of New Investor journey – **Open Account**.

MyWealth

Account Opening

Contact Information

Email Address
Enter email address

Mailing Address
Select country

Enter address line 1

Enter address line 2

Enter address line 3

Enter address line 4 (optional)

Enter post code

Select state

Mobile Phone Number
+60 12 888 1818
(Please visit your nearest CIMB Bank's branch or ATM to change your mobile number)

House Phone Number (optional)
eg 601345678910

Office Phone Number (optional)
eg 601345678910

Previous Next

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Account Opening – General Information

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 **approve transaction via SecureTAC**.
- Go to UT Dashboard to review your first initial investment purchase.

The screenshot shows the 'Summary' page of a purchase request. At the top, a progress bar indicates the steps: Add an Order, Select Investment, Amount Payable, and Confirm Purchase. The main content area displays the following details:

- Transaction Type: Purchase
- Fund Name: PRINCIPAL ASIA PACIFIC DYNAMIC GROWTH FUND (MYR CLASS)
- Sales Charge (1.75%): MYR 17.50
- Net Investment Amount: MYR 982.50
- Amount: MYR 1,000.00
- Total Amount: MYR 1,000.00

Below this, there is a section for 'Select payment account' with a dropdown menu showing 'CIMB Current Account 1625729216288'. A 'Proceed' button is visible at the bottom right of the summary section.

The screenshot shows the 'SecureTAC Approval' screen. It features a yellow background and a lock icon. The text reads: 'SecureTAC Approval. Do not close or refresh. Transaction will expire in 48 seconds. Cancel'. Below this, there are instructions on how to approve the transaction:

- 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'.

A smartphone icon is shown on the right side of the screen, displaying the SecureTAC notification.

The screenshot shows the 'Purchase Request' page. At the top, a progress bar indicates the steps: Add an Order, Select Investment, Account Opening, and Confirm Purchase. The main content area displays the following details:

- Transaction Details: Reference number (Ref 7000149), Recipient name (Ali Amir bin Ahmad), Unit Trust Account (V-840611-023), Payment account (16286729231).
- Account Opening: Title, Name (Ali Amir bin Ahmad), Mykad / Passport number (*****3477), Date of Birth (11 June 1984), Email address (a1*****@gmail.com), Mailing address (No. 5 Block B, Jalan PJU 10/3C, Damansara Dama, 47830 Petaling Jaya, Selangor, Malaysia), Mobile phone number (*****818), House phone number, Office phone number, Nationality (Malaysia), Citizen (Malaysia), Gender (Male), Race (Bumiputera), Religion (Islam), Marital status (Married), Industry (Accommodation / Food Service - Others accommodation), Profession (Other Food Processing and Related Trades Workers), Settlement account (CIMB Current Account 16285729231).
- Fund Summary: Fund name (PRINCIPAL ISLAMIC DEPOSIT), Sales charge (1.75%) (MYR 17.50), Net Investment amount (MYR 982.50), Amount (MYR 1,000.00).

At the bottom right, there are two buttons: 'Download Receipt' and 'Go to Dashboard'.

Download Receipt

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

The background features a white central area with large, diagonal geometric shapes in red and grey. On the left, a portion of a modern building facade is visible, showing a grid of windows and a bright light source. Thin red lines cross the white area diagonally.

ASNB (New Investor)

Link ASNB Account

The screenshot shows the MyWealth dashboard with a red header. The main content area is divided into several sections:

- MY OVERALL WEALTH WITH CIMB:** A bar chart showing 99.0% in green and 50.0% in blue. Below it, 'Asset' is MYR 100,000.00 and 'Liabilities' is MYR 100,000.00.
- MY RISK PROFILE:** A gauge chart labeled 'Balance' with a 'Learn More' link.
- Product currently in MyWealth:** A list including Unit Trust, Amanah Saham Nasional Berhad, Current & Savings Account, Fixed Deposit, and Loan / Financing.
- Assets / Liabilities:** A donut chart showing 'My Investment 50.0%' (MYR 50,000.00) and 'My Deposit 50.0%' (MYR 50,000.00).
- My Investment:** A section for 'UNIT TRUST' with account number 1803351902, a total current investment value of MYR 25,000.00, and a 'Link account' button highlighted with a red dashed box.
- My Deposit:** A list of deposit accounts:
 - CURRENT ACCOUNT-1:** MYR 10,000.00
 - SA STATEMENT ACCOUNT:** MYR 10,000.00
 - FIXED RETURN INCOME ACCOUNT-1:** MYR 30,000.00
 - FCA SGD:** SGD 9,560.00 (MYR 30,000.00)
- CIMB FIXED DEPOSIT:** A green banner with an 'Apply now' button and a CIMB logo.

The modal window is titled 'Link ASNB Account' and features a checkmark icon. The text inside reads:

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 [Prospectus](#) & [ASNB Terms of Access](#) as specified on the ASNB website.

At the bottom, there are two buttons: 'Cancel' (grey) and 'Link account' (red).

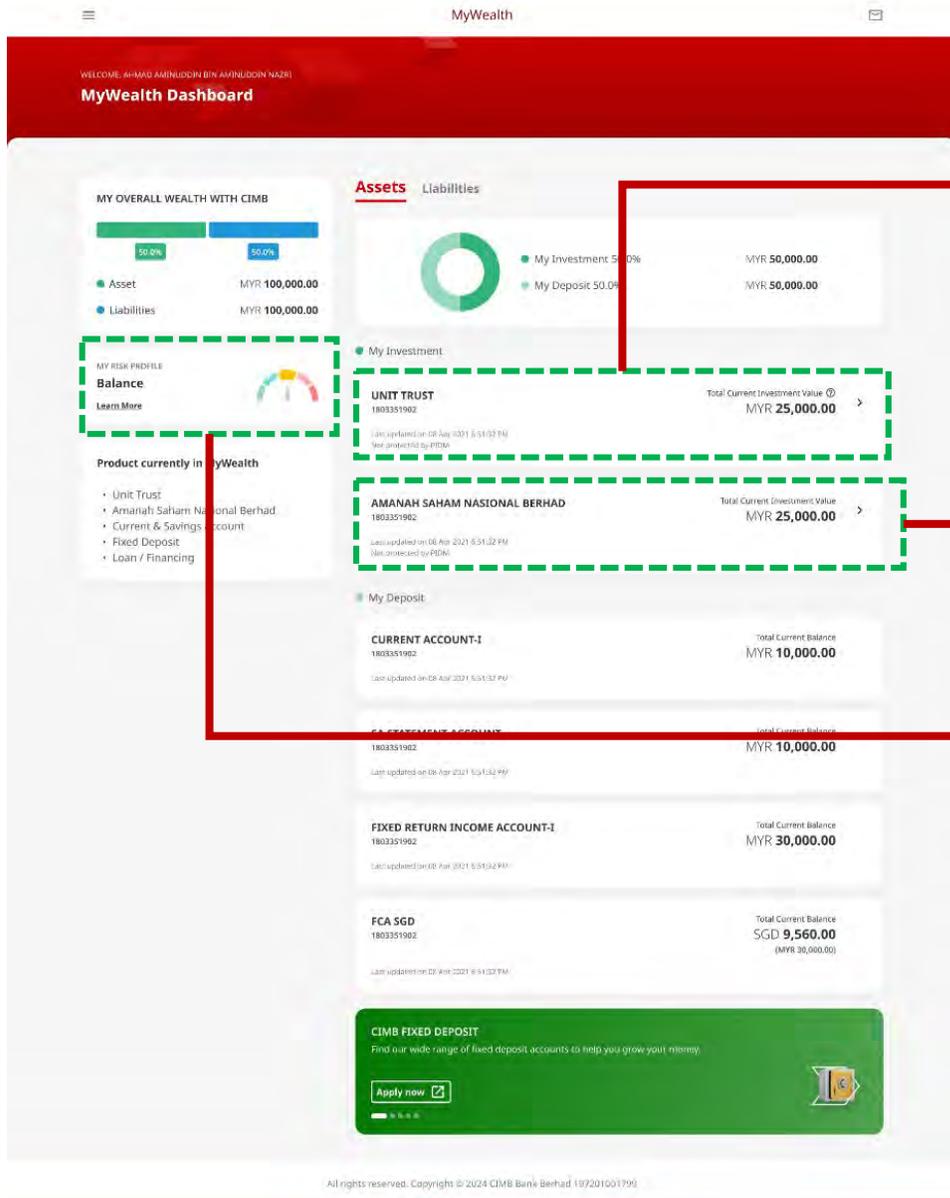
Link ASNB Account (for 1st time user in portal only)

- You are required to provide consent to link their existing ASNB account(s) with CIMB MyWealth.
- After clicking the '**Link Account**' button, you are required to approve this activity *via* SecureTAC.
- You may view your ASNB account(s) and the corresponding investment holdings listed in MyWealth Dashboard.

The background features a white central area with several geometric shapes: a large red triangle in the top right, a red triangle in the bottom left, and a grey triangle in the bottom right. On the left side, there is a photograph of a modern building with a glass facade and a yellow circular light fixture. Thin red lines cross the white area diagonally.

MyWealth Dashboard (Existing Customer)

MyWealth Dashboard – Existing Investor



Unit Trust

- Click on 'View Account' in Unit Trust Dashboard to manage Unit Trust funds

Amanah Saham Nasional Berhad (ASNB)

- Click on View Account in ASNB Dashboard to manage ASNB funds

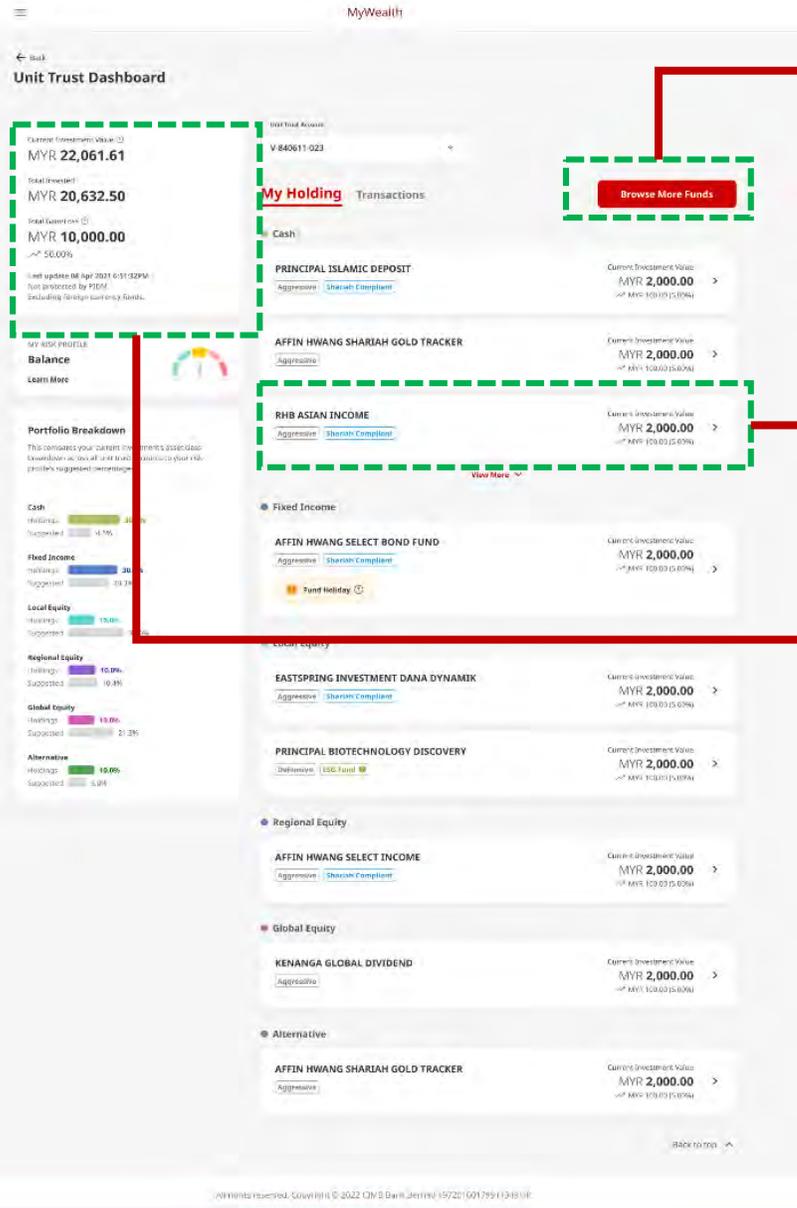
Customer Risk Profile

- Customer may their view Risk Profile status
- Customer may update their Risk Profile
- Customer may click on 'Learn More' to view Risk Profile details

The background features a white central area with geometric shapes in red and grey. On the left, there is a photograph of a modern building's exterior with a grid-like facade and a bright light source. The text is centered in a bold, dark grey font.

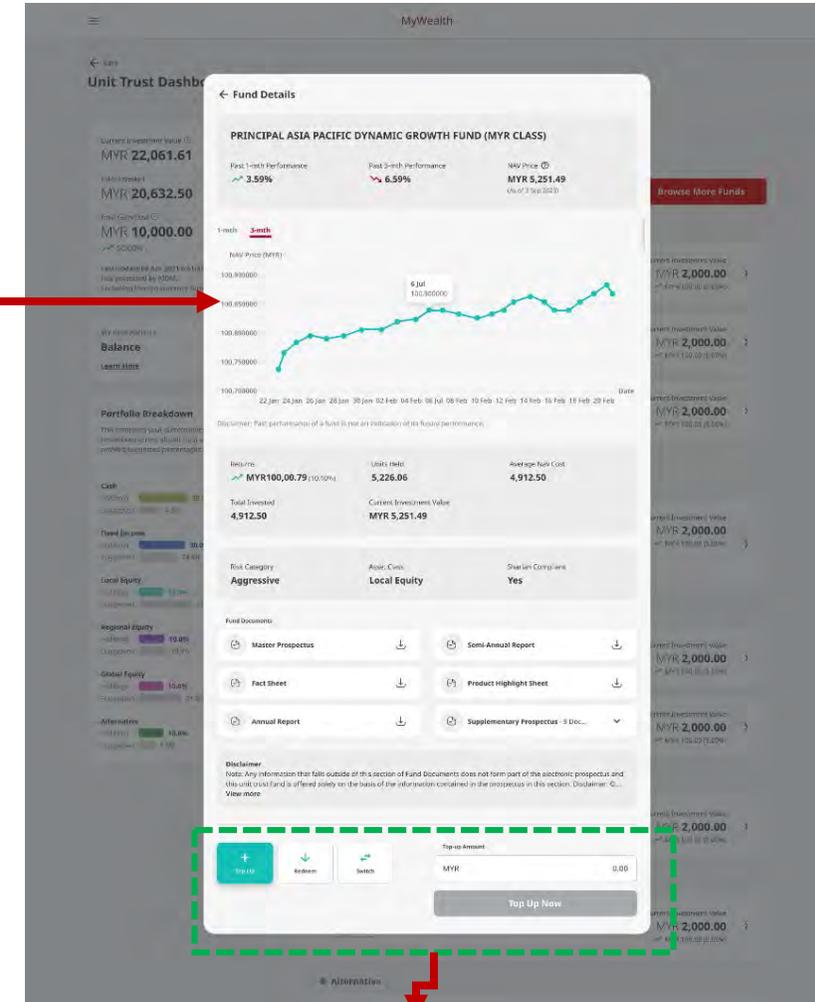
Unit Trust Existing Customers

Unit Trust Dashboard



Add New Investment

- Click on “Browse more funds” to proceed with new fund(s) purchase.



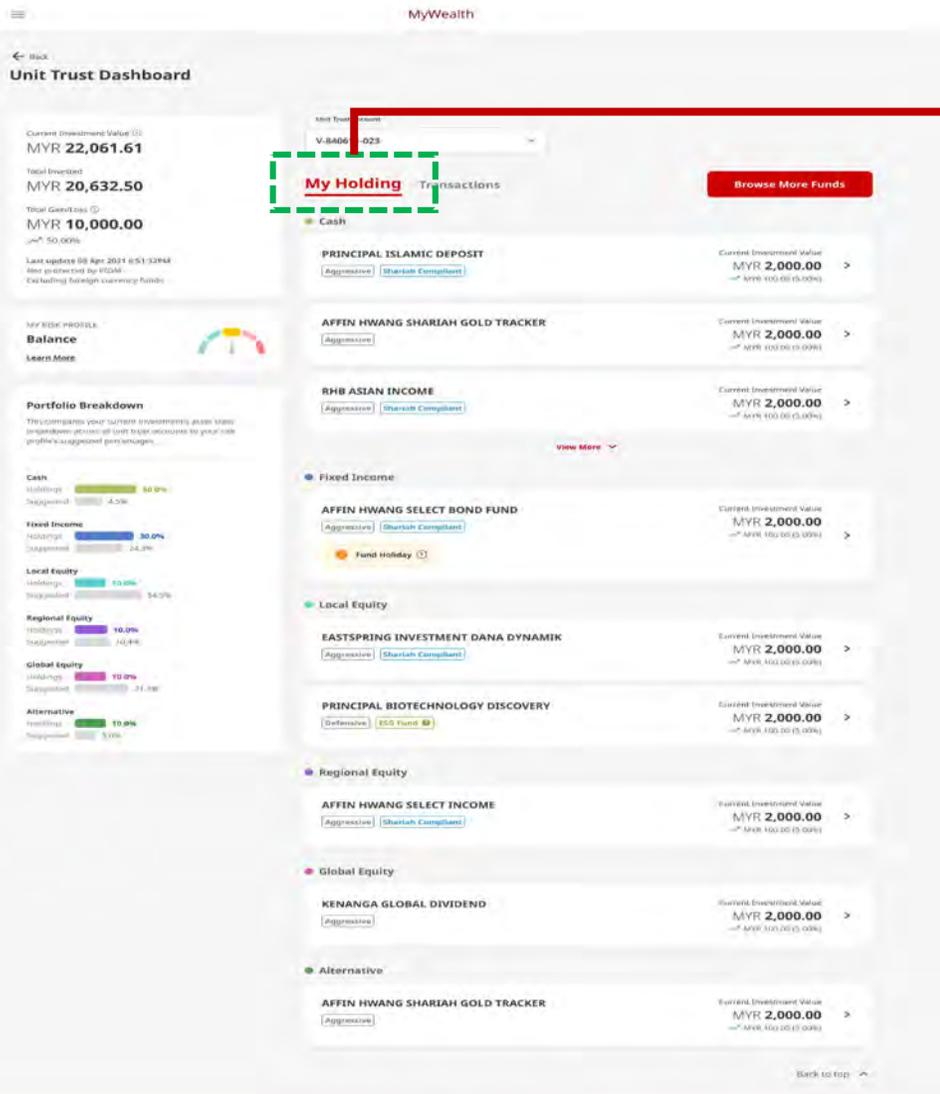
Fund details Pop Up

- Click on fund name to expand and view fund holdings details.
- Customer may proceed with top-up, switch or redeem existing fund here.

UT Dashboard

- View current investment value, total invested and total gain/loss.

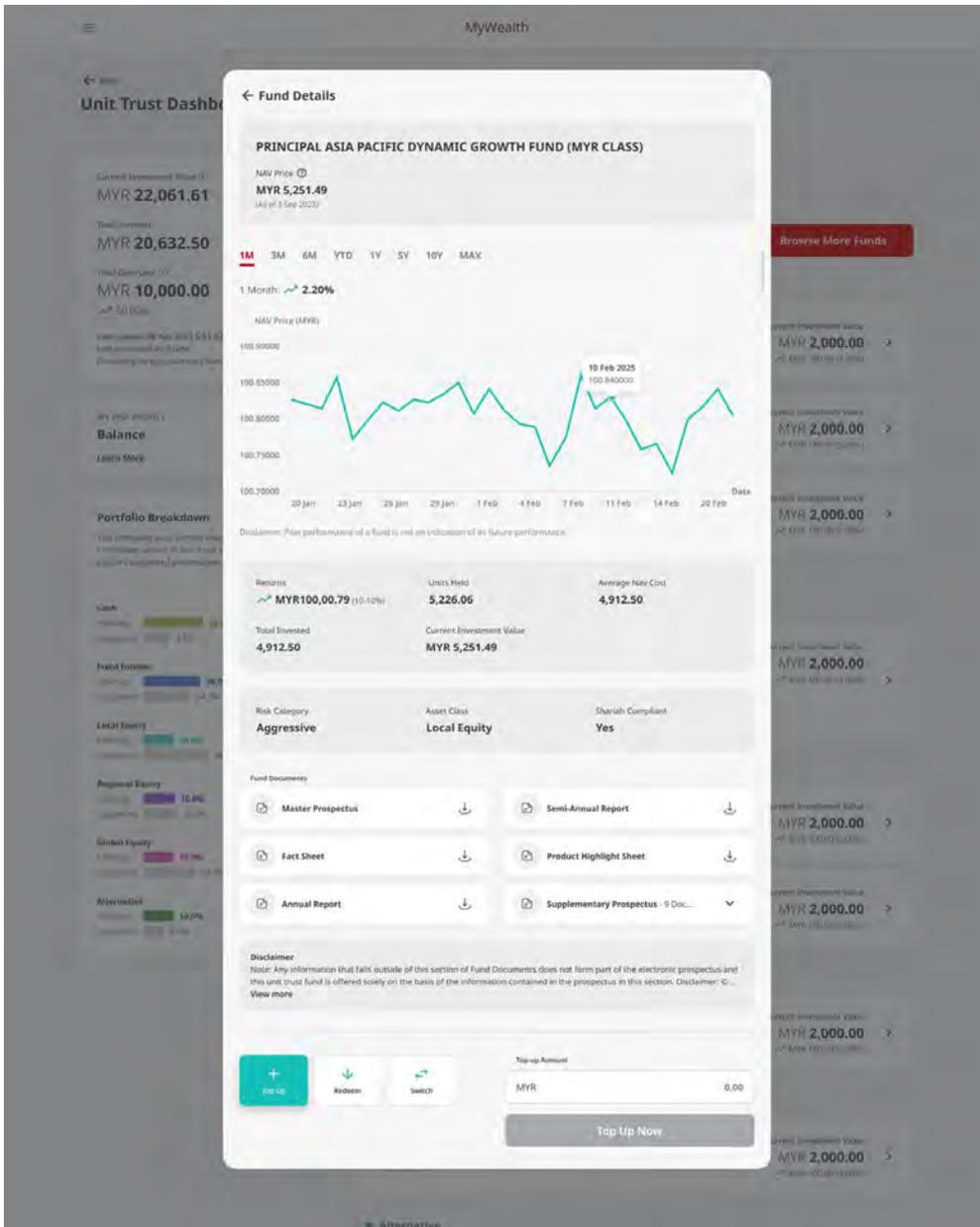
UT Dashboard – Existing Fund Top Up



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



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

MyWealth

Summary

Account Number: A801668188
Transaction Type: Purchase

Fixed Price
PRINCIPAL ASIA PACIFIC DYNAMIC GROWTH FUND (MYR CLASS)
[Aggressive] [Shareh Careless]

Sales Charge (1.75%)	MYR 17.50
Net Investment Amount	MYR 982.50
Amount	MYR 1,000.00

Total Amount MYR 1,000.00

Select Settlement Account

CIMB Current Account 16257292183288

Transactions performed after 2pm will be executed on the next business day.

By clicking "Proceed", I confirm that:

- I have read, understood and agree to be bound by the following:
 - Product highlight sheet(s), prospectus(es) of the unit trust schemes I am about to invest in and understand the contents thereof;
 - Terms and Conditions Governing the Operation of the Unit Trust Account and Custodial Services;
 - Customer Declaration;
 - Investor Suitability Assessment Declaration;
 - CIMB Group Privacy Notice; and
 - Unit Trust Loan Financing Risk Disclosure Statement.
- The key contract terms affecting my obligations in relation to the unit trust fund(s) have been adequately explained to me; and
- CIMB may proceed to debit my Settlement Account for the purchase of the unit trust fund(s).
Transactions performed after 2pm will be executed the next business day, which refer to the days on which banks in Kuala Lumpur are open.

In the event a supplementary prospectus is issued, you will have the option to withdraw your application, provided that the issuance or transfer of units has not taken place.

If you have any concerns or enquiries on unit trust funds or if you are eligible for such a withdrawal, please call our **Consumer Contact Centre** or visit any **CIMB branch** for assistance.

FATCA/CRS: I confirm that I am solely/renly a tax resident of Malaysia and do not have any foreign tax residency nor a US residency status (tax or otherwise). For foreign tax residents, please visit your nearest CIMB branch for assistance.

You will receive a SecureTAC on your app to approve or reject the transaction.

Proceed

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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.

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 Notifications > 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, you will be redirected to SecureTAC Approval page.
- You are required to approve/reject the SecureTAC via CIMB OCTO mobile app.

UT Dashboard – Receipt

Purchase Request

MyWealth

We're Processing your Purchase Request
Processing usually takes up to 3+ working days

MYR 1,000.00
20 Jan 2023, 10:31:50 AM

Transaction Details	
Reference number	Ref 7000149
Recipient name	Ali Amir bin Ahmad
Unit Trust account	V-840611-023
Payment account	16286729231

Fund Summary	
Fund name	PRINCIPAL ISLAMIC DEPOSIT
Sales charge (1.75%)	MYR 17.50
Net investment amount	MYR 982.50
Amount	MYR 1,000.00

Total sales charges	MYR 17.50
Net investment amount	MYR 982.50
Total amount	MYR 1,000.00

[Download Receipt](#) 

[Go to Dashboard](#)

Go To Dashboard

- Click on “**Go to Dashboard**” button to return to UT Dashboard

Download Receipt

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

UT Dashboard – Transaction History

The screenshot displays the MyWealth Unit Trust Dashboard. On the left, there is a summary of account balances: Current Investment Value (MYR 22,061.61), Invested (MYR 20,632.50), and Total Gains (MYR 10,000.00). Below this is a 'Balance' section with a 'Learn More' link and a 'Portfolio Breakdown' section showing asset allocation: Cash (10%), Fixed Income (20%), Local Equity (10%), Regional Equity (10%), Global Equity (10%), and Alternative (10%).

The main area shows a list of transactions under the heading 'Transactions', which is highlighted with a green dashed box. The transactions are listed as follows:

- Wed 1 Feb 2024**
 - EASTSPRING INVESTMENT BANA DYNAMIK** (MYR 6,400.00)
 - PRINCIPAL ASIA PACIFIC DYNAMIC GROWTH FUND (MYR CLASS)** (MYR 7,000.00)
- Mon 2 Jan 2024**
 - AFFIN HWANG SELECT BOND FUND** (MYR 250.00)
 - CMB PRINCIPAL FRS PLUS** (MYR 695.50)
 - CMB PRINCIPAL FRS PLUS** (MYR 1,200.00)
 - PRINCIPAL ISLAMIC DEPOSIT** (MYR 1,200.00)
 - PRINCIPAL ASIA PACIFIC DYNAMIC INCOME** (MYR 100.00)
 - AFFIN HWANG SHAHSAN GOLD TRACKER** (MYR 24,000.00)
 - KENANGA GLOBAL DIVIDEN** (MYR 100.00)
 - ANAM AZMAN GLOBAL WORLD SERIES - GLOBAL HIGH INCOME** (MYR 100.00)
- Sun 1 Jan 2024**
 - AFFIN HWANG NEXT GENERATION TECHNOLOGY** (MYR 12,000.00)

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.

The background features a white central area with several large, overlapping geometric shapes in red and grey. On the left side, there is a photograph of a modern building's exterior, showing a grid of windows and a prominent yellow circular light fixture. Thin, dark lines crisscross the white space, creating a sense of depth and structure.

ASNB

Existing Investor

ASNB Dashboard

Web Browser

My ASNB Dashboard

Current Investment Value: MYR 20,000.00

My Funds

Browse More Funds

Latest Fund Price

Fund Information & Sales Charge

Fund Name	Current Value
AMANAH SAHAM COMPUTERA	MYR 2,000.00
AMANAH SAHAM COMPUTERA 2	MYR 2,000.00
AMANAH SAHAM MALAYSIA	MYR 2,000.00
AMANAH SAHAM MALAYSIA 2 WAWASAN	MYR 2,000.00
AMANAH SAHAM MALAYSIA 3	MYR 2,000.00
ASN EQUITY 2	MYR 2,000.00
ASN EQUITY 3	MYR 2,000.00
ASN IMBANG (MIXED ASSET BALANCE)	MYR 2,000.00
ASN IMBANG (MIXED ASSET BALANCE) 2	MYR 2,000.00
ASN SARA (MIXED ASSET CONSERVATIVE) 2	MYR 2,000.00

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

MyWealth

My ASNB Dashboard

AMANAH SAHAM BUMIPUTERA

Current value MYR 1,000.00

UBB 199,000 Units

UBC 1,000.00 Units

Hide past transactions

Date	Description	Amount
29 Dec 2022	Normal Reinvestment	MYR 1,000.00
29 Dec 2022	Normal Reinvestment	MYR 1,000.00
29 Dec 2022	Normal Reinvestment	MYR 1,000.00
29 Dec 2022	Normal Reinvestment	MYR 1,000.00
29 Dec 2022	Normal Reinvestment	MYR 1,000.00
29 Dec 2022	B/F	MYR 1,000.00

Top up amount

MYR 1.00

Variable Price Funds

ASN EQUITY 2

Browse More Funds

Current value MYR 2,000.00

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

The screenshot shows the 'My ASNB Dashboard' with a balance of MYR 20,000.00. Under the 'My Funds' section, there is a list of funds including 'AMANAH SAHAM BUMIPUTERA', 'AMANAH SAHAM MALAYSIA', and 'AMANAH SAHAM MALAYSIA 2'. A red box highlights the 'Latest Fund Price' section on the left, and a red arrow points from it to a modal window on the right.

View Fund Price

https://www.asnb.com.my/dpv2_thedisplay-tv_EN.php

Redirection to Third Party Website

Your are about to access a third party website & CIMB Group's Privacy Policy will not apply to the website. This link is provided for your convenience only and shall not be considered or construed as an endorsement or verification of such linked website or its content by CIMB Group.

CIMB Group makes no warranties as to the status of this link or information in the website you are about to access.

Do you wish to proceed?

Okay

View Sales Charge and Prospectus

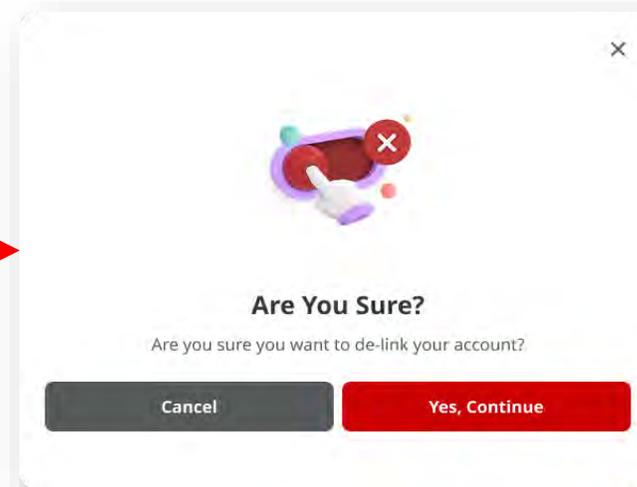
https://www.asnb.com.my/asnbv2_2funds_EN.php#prospektusphs

ASNB Dashboard – Delink ASNB Account

Web Browser

The screenshot shows the MyWealth ASNB Dashboard. The user's name is Ahmad Aminuddin bin A... and the account number is V-840811-023. The current investment value is MYR 20,000.00. The dashboard lists various funds under 'Fixed Price Funds' and 'Variable Price Funds'. A green dashed box highlights the 'De-link ASNB Account' button at the bottom left. A red arrow points from this button to a confirmation dialog box on the right.

Fund Name	Current value
AMANAH SAHAM BUMIPUTERA	MYR 2,000.00
AMANAH SAHAM BUMIPUTERA 2	MYR 2,000.00
AMANAH SAHAM MALAYSIA	MYR 2,000.00
AMANAH SAHAM MALAYSIA 2 WAWASAN	MYR 2,000.00
AMANAH SAHAM MALAYSIA 3	MYR 2,000.00
ASN EQUITY 2	MYR 2,000.00
ASN EQUITY 3	MYR 2,000.00
ASN IMBANG (MIXED ASSET BALANCE) 1	MYR 2,000.00
ASN IMBANG (MIXED ASSET BALANCE) 2	MYR 2,000.00
ASN SARAJ (MIXED ASSET CONSERVATIVE) 2	MYR 2,000.00



De-link ASNB Account

- You can de-link their ASNB account *via* ASNB Dashboard.
- After de-link account, you will be redirected to MyWealth Dashboard

ASNB Subscription (Top up)

Web Browser

MyWealth

My ASNB Dashboard

AMANAH SAHAM BUMIPUTERA

Current value MYR 1,000.00 UBS 199,000 Units UBC 1,000.00 Units

Hide past transactions

Date	Description	Amount
29 Dec 2022	Normal Reinvestment	MYR 1,000.00
29 Dec 2022	Normal Reinvestment	MYR 1,000.00
29 Dec 2022	Normal Reinvestment	MYR 1,000.00
29 Dec 2022	Normal Reinvestment	MYR 1,000.00
29 Dec 2022	Normal Reinvestment	MYR 1,000.00
29 Dec 2022	B/F	MYR 1,000.00

Top up amount

MYR 1.00 Top Up Now

Variable Price Funds

ASNB EQUITY 2

Browse More Funds

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.

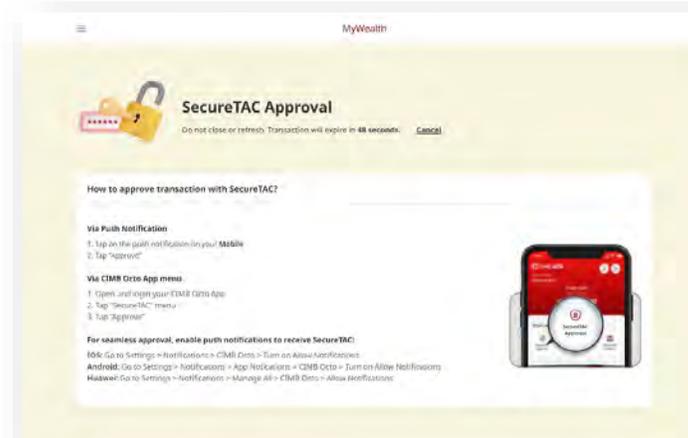
ASNB Subscription – Checkout

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

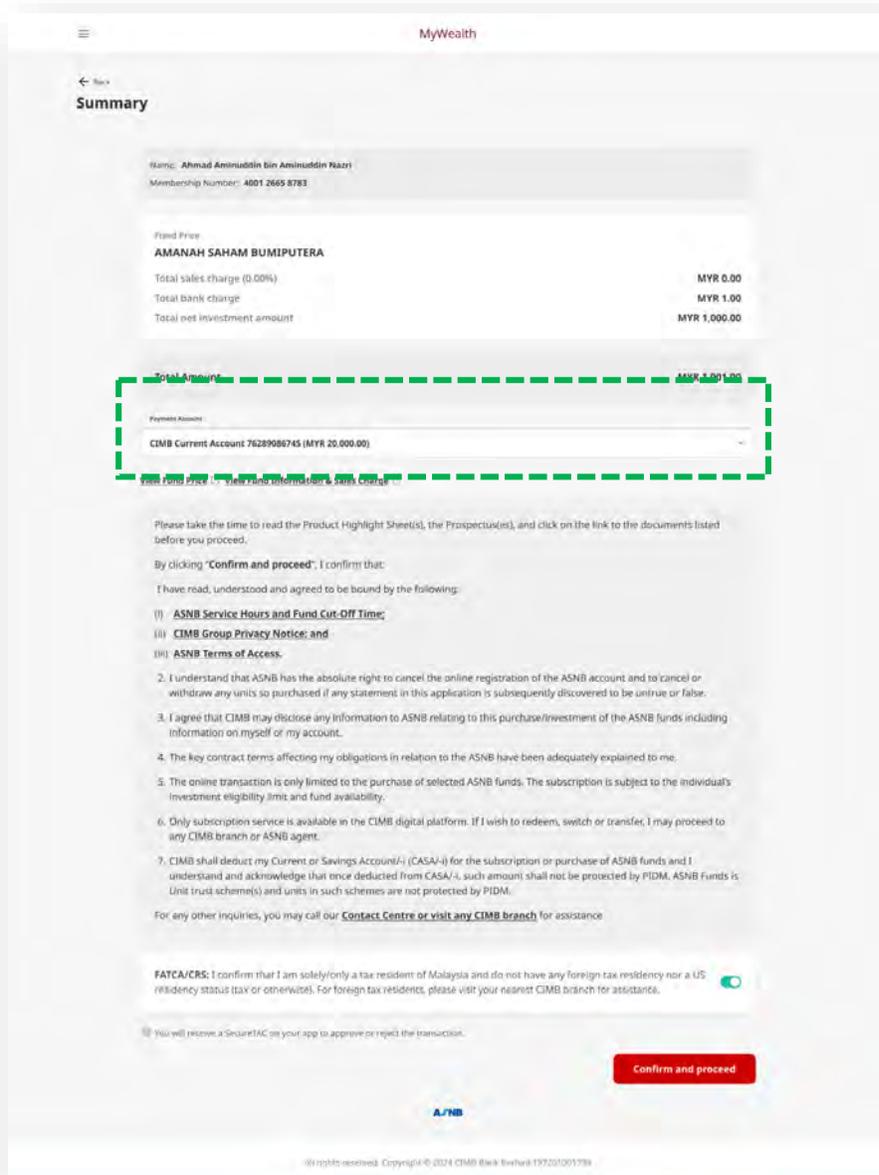
Payment Account

- 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

MyWealth

Successful
Purchase Summary
MYR 1,001.00
31 Jul 2024 3:52:41 PM

Transaction Details

Bank reference number	Ref 7000149
Transfer to	Ahmad Aminuddin
ASNB membership number	XXXX XXXX 8783
ID number	XXXXXX-XX-6766
Settlement account	16285729231
ASNB reference number	Ref 1425634718290192

Fund Summary

Fund name	AMANAH SAHAM BUMIPUTERA
Fund type	Fixed Price
Units allotted	1,000.00
NAV price	MYR 1.0000

[View Fund Price](#) [View Fund Information & Sales Charge](#)

Total sales charges (0.00%)	MYR 0.00
Total bank charge	MYR 1.00
Total net investment amount	MYR 1,000.00
Total amount	MYR 1,001.00

ASNB

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Done

Receipt Page

- You can view summary of transaction performed.

Go To Dashboard

- You can return to the ASNB Dashboard - My Fund tab by clicking on “Okay”.

ASNB Subscription – PDF Receipt

MyWealth



We have successfully received your transaction request

MYR 1,001.00
20 Jan 2023, 10:35:50 AM

Bank reference number	Ref 7000149
Transfer to	Ahmad Aminuddin
ASNB membership number	XXXX XXXX 8783
NRIC	XXXXXX-XX-6766
Settlement account	16285729231
ASNB reference number	Ref 1425634718290192

Fund name	AMANAH SAHAM BUMIPUTERA
Fund type	Fixed Price
Units allotted	1,000.00
NAV price	MYR 1.0000

Total sales charges (0.00%)	MYR 0.00
Total bank charge	MYR 1.00
Total net investment amount	MYR 1,000.00

PDF Receipt

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

ASNB Add New Favourite

The screenshot shows the ASNB MyWealth dashboard. At the top, there's a navigation bar with 'MyWealth' and a search icon. Below that, the 'ASNB Dashboard' is displayed. On the left, there's a 'Current investment value' section showing 'MYR 20,000.00' and a 'Latest Fund Price' section. The main area is titled 'My Funds Favourites' and shows a grid of fund cards. Each card includes the fund name, code, and a 'Purchase >' button. A red dashed box highlights the 'Add new favourites' button in the top right corner of the fund grid, with a red arrow pointing from it to the instructions on the right.

Add Favourite

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

ASNB Add New Favourite

MyWealth

← Back

Add New Favourite Account

Favourite Account Details

Nickname:
Ar Raudhah Aminuddin

ASNB Membership Number:
1098 7654 3210

Fund Name:
AMANAH SAHAM BUMIPUTERA

Member's ID Type: NRIC ID Number: 880623-14-9909

Relationship:
Friend/Acquaintance

Proceed

ASNB

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Add New Favourite Account

- You will be redirected to Add New Favourite Account page
- you may fill up all the necessary information

Click **'Proceed'** button when complete

ASNB Add New Favourite

MyWealth

← Back

Review and Add to Favourite

Account Details

Nickname	ASNB membership number	ID type
Ar Raudah Aminuddin	1098 7654 3210	NRIC
ID number	Relationship	Fund name
880623-14-9909	Friend/Acquaintance	AMANAH SAHAM BUMIPUTERA

FATCA/CRS: I confirm that I am solely/only a tax resident of Malaysia and do not have any foreign tax residency nor a US residency status (tax or otherwise). For foreign tax residents, please visit your nearest CIMB branch for assistance.

You will receive a SecureTAC on your app to approve or reject the transaction.

Confirm and proceed

ASNB

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Review and Add to Favourite

- You may review all the information to ensure it is correct

Click **'Confirm and Proceed'** button when complete

ASNB Add New Favourite

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:

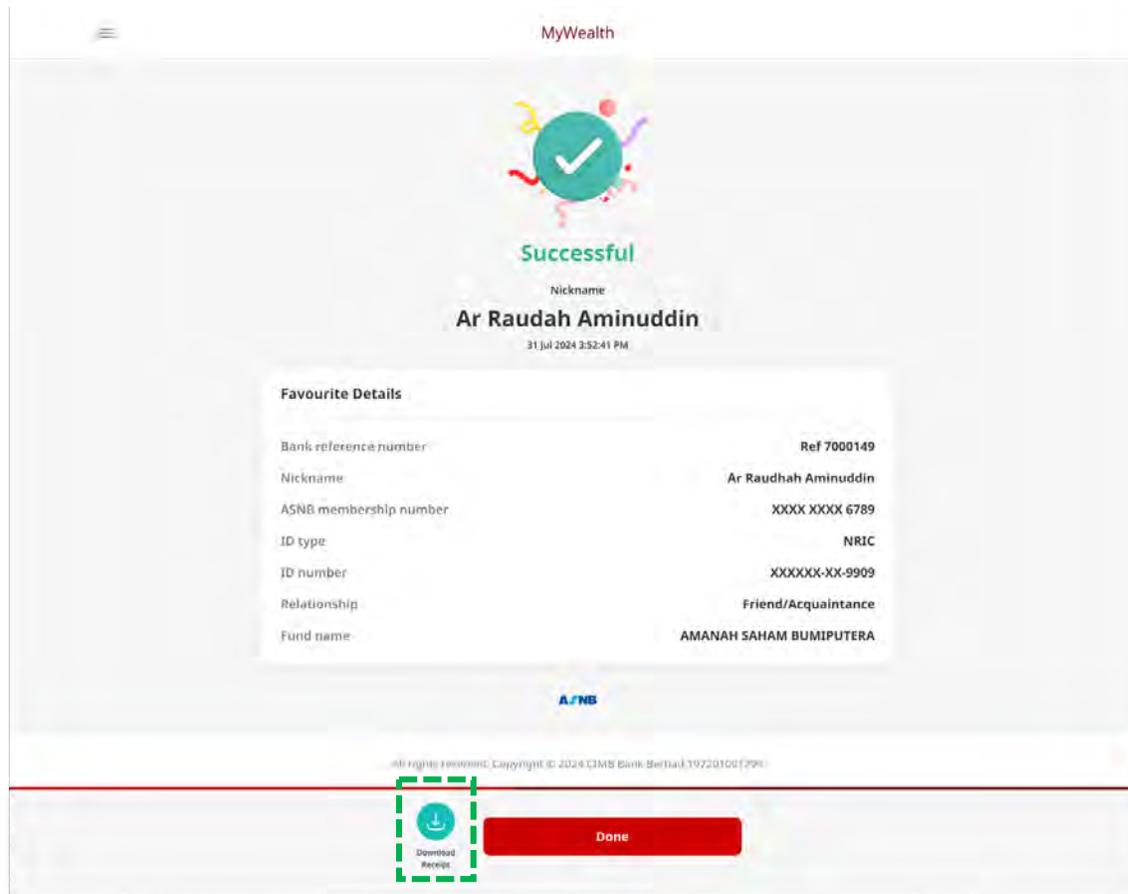
iOS: Go to Settings > Notifications > CIMB Octo > Turn on Allow Notifications
Android: Go to Settings > Notifications > App Notifications > CIMB Octo > Turn on Allow Notifications
Huawei: Go to Settings > Notifications > Manage All > CIMB Octo > Allow Notifications



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.

ASNB Add New Favourite



PDF Receipt

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

ASNB Purchase for Favourite

The screenshot shows the 'Purchase for Favourite' screen in the MyWealth app. The screen is divided into sections: Account Details, Savings, and Fund Details. The 'Proceed' button is highlighted with a green dashed box. A red arrow points from this button to a callout box. Another red arrow points from the 'Proceed' button to a second callout box. A third red arrow points from the 'Proceed' button to a 'Source of Funds' pop-up dialog.

Purchase for Favourite

- Fill up the necessary information and review all the information before proceeding
- Click on 'Proceed' button

Additional Logic
Purchasing 10K MYR (both FP and VP) for favourite account, customer will be prompted with Source of Fund pop up

Source of Funds

Select source of funds

Cancel Continue

Account Details

ASNB Membership number
XXXX XXXX 8783

Nickname
Ar Raudah Aminuddin

Member's ID Type
NRIC

ID Number
XXXX-XX-9909

Relationship
Friend/Acquaintance

Reason for transfer

Savings

Fund Details

Fund Name
AMANAH SAHAM BUMIPUTERA

Transfer Amount
MYR 10,000.00

Proceed

A/NB

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ASNB Purchase for Favourite

The screenshot shows the 'Summary' page of the MyWealth application. At the top, it displays the user's name 'Ahmad Aminuddin bin Aminuddin Nawi' and membership number '4001 2443 8783'. Below this, the 'Account Details' section lists the account name 'Ar Raudah Aminuddin', ID number '880523-14-9909', and relationship 'Friend/Acquaintance'. The 'Source Details' section indicates the source is 'Savings'. The 'Fund Details' section shows the selected fund 'AMANAH SAHAM BUMPUTERA' with a total investment amount of MYR 10,000.00. A table below this shows charges: Total sales charge (0.00%), Total bank charge (MYR 1.00), and Total net investment amount (MYR 10,000.00). The 'Total Amount' is MYR 10,001.00. The 'Payment Account' is 'CIMB Current Account 76288082745 (MYR 20,000.00)'. The 'View Fund Price' and 'View Fund Information & Sales Charge' links are present. A disclaimer section follows, stating that the user has read and understood the terms and conditions, including the ASNB Service Hours and Fund Cut-Off Time, CIMB Group Privacy Notice, and ASNB Terms of Access. A 'Confirm and proceed' button is located at the bottom right of the page.

MyWealth

Summary

Name: Ahmad Aminuddin bin Aminuddin Nawi
Membership Number: 4001 2443 8783

Account Details

Name:	ASNB Introducing member	ID Type:
Ar Raudah Aminuddin	XXXX XXXX 8783	NRIC
ID Number:	Relationship	Investment
880523-14-9909	Friend/Acquaintance	Savings

Source Details

Source of Fund:
Savings

Fund Name
AMANAH SAHAM BUMPUTERA

Total sales charge (0.00%)	MYR 0.00
TOTAL BANK CHARGE	MYR 1.00
Total net investment amount	MYR 10,000.00

Total Amount MYR 10,001.00

Payment Account
CIMB Current Account 76288082745 (MYR 20,000.00)

View Fund Price [View Fund Information & Sales Charge](#)

Please take the time to read the Product, Highlight Sheets, the Prospectuses, and click on the link to the documents listed before you proceed.

By clicking "Confirm and proceed", I confirm that:

I have read, understood and agreed to be bound by the following:

- ASNB Service Hours and Fund Cut-Off Time;
- CIMB Group Privacy Notice; and
- ASNB Terms of Access.

I understand that ASNB has the absolute right to cancel the online registration of the ASNB account and to cancel or withdraw any units so purchased if any statement in this application is subsequently discovered to be untrue or false.

I agree that CIMB may disclose any information to ASNB relating to this purchase/investment of the ASNB funds (including information on myself or my account).

The key contract terms affecting my obligations in relation to the ASNB have been adequately explained to me.

The online transaction is only limited to the purchase of selected ASNB funds. The subscription is subject to the individual's investors' eligibility limits and fund availability.

Only subscription service is available in the CIMB digital platform. If I wish to redeem, switch or transfer, I may proceed to any CIMB branch or ASNB agent.

CIMB shall deduct my Corner or Savings Account (KASAP) for the subscription or purchase of ASNB funds and I understand and acknowledge that once deducted from KASAP, such amount shall not be protected by PIDM, ASNB Funds (Unit Trust Schemes) and units in such schemes are not protected by PIDM.

For any other inquiries, you may call our Contact Centre or visit any CIMB branch for assistance.

FATCA/CRS: I confirm that I am solely/only a tax resident of Malaysia and do not have any foreign tax residency (i.e. a US residency status (tax or otherwise)). For foreign tax residents, please visit your nearest CIMB branch for assistance.

MyWealth mobile app is required to complete or track the transaction.

Confirm and proceed

A7MB

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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

ASNB Purchase for Favourite

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 Notifications > 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.

ASNB Purchase for Favourite

The screenshot displays a 'Successful' transaction confirmation in the MyWealth app. At the top, a green checkmark icon is accompanied by the word 'Successful' and a 'Purchase Summary' of MYR 10,001.00, dated 31 Jul 2024 3:52:41 PM. Below this, the 'Transaction Details' section lists: Bank reference number (Ref 7000149), Transfer to (Ar Raudhah binti Aminuddin), ASNB membership number (XXXX XXXX 6789), ID number (XXXXXX-XX-9909), Relationship (Friend/Acquaintance), Reason (Savings), Settlement account (16285729231), and ASNB reference number (Ref 1425634718290192). The 'Fund Summary' section identifies the fund as AMANAH SAHAM BUMIPUTERA, a Fixed Price fund with 1,000.00 units allotted at a NAV price of MYR 1.0000. At the bottom, a table shows charges: Total sales charges (0.00%), Total bank charge (MYR 1.00), and Total net investment amount (MYR 1,000.00), resulting in a Total amount of MYR 10,001.00. A 'Download Receipt' icon (a green circle with a white download arrow) is highlighted with a red dashed box, and a red arrow points from this icon to a 'Done' button. The ASNB logo is visible at the bottom center of the screen.

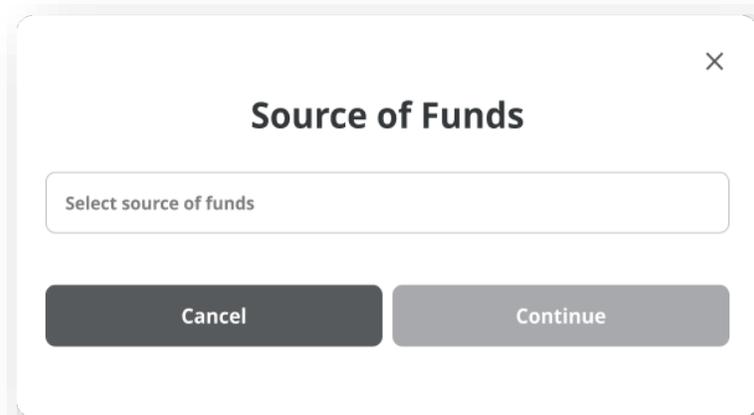
PDF Receipt

- 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

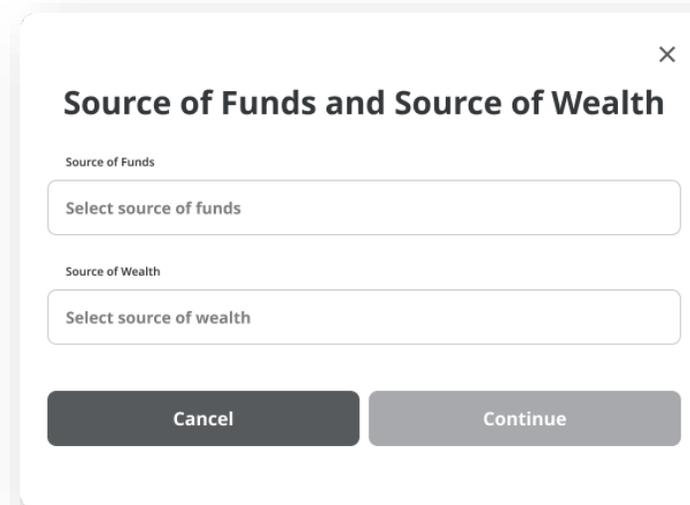
ASNB AMLA Requirement

Subscription/Add New Investment for Principal/Minor Account

Risk Status	Amount	Input
Empty/Low/Medium/ High Complete	≥RM 25K	SOF
	<RM 25K	No additional input
High Incomplete	≥RM 1	SOF & SOW



A dialog box titled "Source of Funds" with a close button (X) in the top right corner. It features a single text input field with the placeholder text "Select source of funds". At the bottom, there are two buttons: "Cancel" and "Continue".



A dialog box titled "Source of Funds and Source of Wealth" with a close button (X) in the top right corner. It contains two sections: "Source of Funds" with a text input field labeled "Select source of funds", and "Source of Wealth" with a text input field labeled "Select source of wealth". At the bottom, there are two buttons: "Cancel" and "Continue".

The background features a white central area with a red triangle in the top right and a grey triangle in the bottom right. On the left, there is a photograph of a modern building with a glass facade and a yellow circular light fixture. Thin red lines cross the white area diagonally.

MyWealth Manager Approval *via* CIMB Clicks

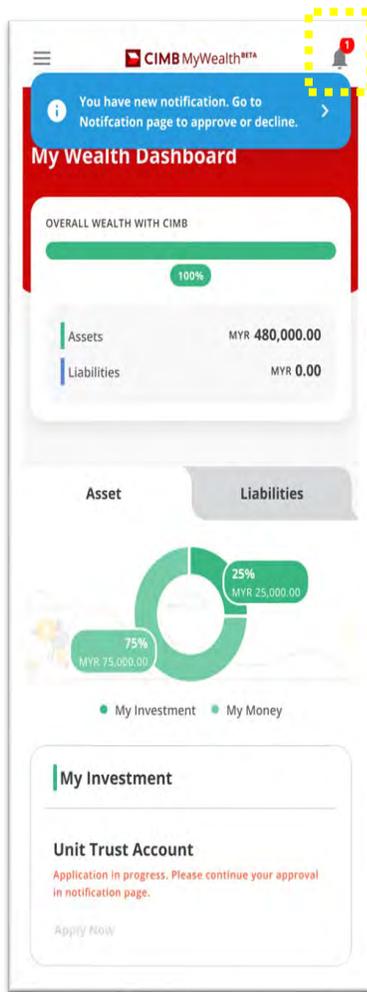
MyWealth Manager Customer Approval Process

1 Select "My Wealth" from sidebar menu

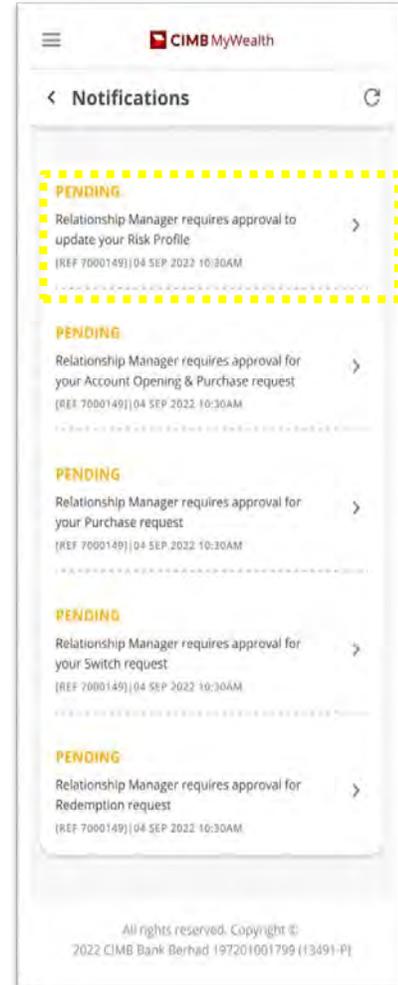
2 Click on "Go to My Wealth"

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

Customer Review Approval Flow



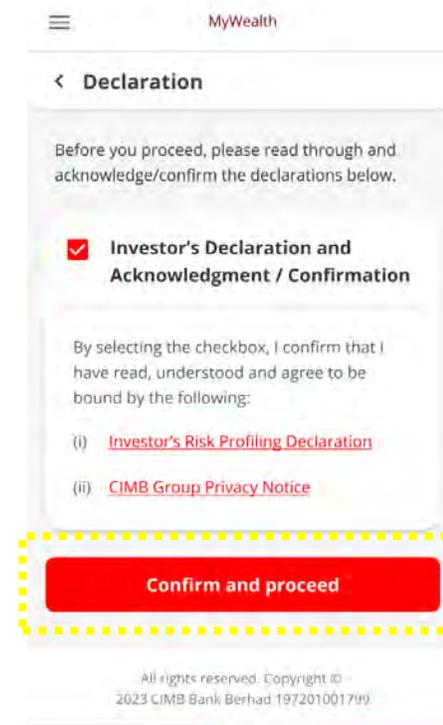
Step 1: Click on Notification icon in the top right corner



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



Step 4: Tick on the checkbox and click on "Confirm and Proceed" button.

Logout Screen

Logout screen

- Can view the summary of transactions performed in CIMB MyWealth

MyWealth

You're Logged Out

Thank you for using My Wealth

04 Sep 2023, 10:35:50 AM

Login session 00h 43min 12s

Your Transaction Activity

Date & Time	Transaction Type	Details	Status	Amount / Units
04 Sep 2023 10:30:50 AM	Unit Trust: Switch Reference No: 700135-01	AFFIN HWANG SELECT BOND FUND - RM ↓ AFFIN HWANG SELECT INCOME	Processing	2,000 Units
04 Sep 2023 10:30:50 AM	Unit Trust: Redemption Reference No: 700135-01	EASTSPRING INVESTMENT DANA DYNAMIK	Processing	2,000 Units
04 Sep 2023 10:30:50 AM	Unit Trust: Switch Reference No: 700135-01	EASTSPRING INVESTMENT SELECT INCOME	Successful	MYR 7,000.00

Disclaimer

The contents in this **CIMB MyWealth User Guide (“Guide”)** are reasonably believed to be correct at the time of issue and are subject to change.

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The information in this Guide is subject to change and correct at the time of issue. Neither does this Guide purport to contain all the information that a prospective investor may require. Because it is not possible for CIMB to have regard to the specific investment objectives, financial situation and particular needs of each person who reads this Guide, the information contained in it may not be appropriate for all persons.

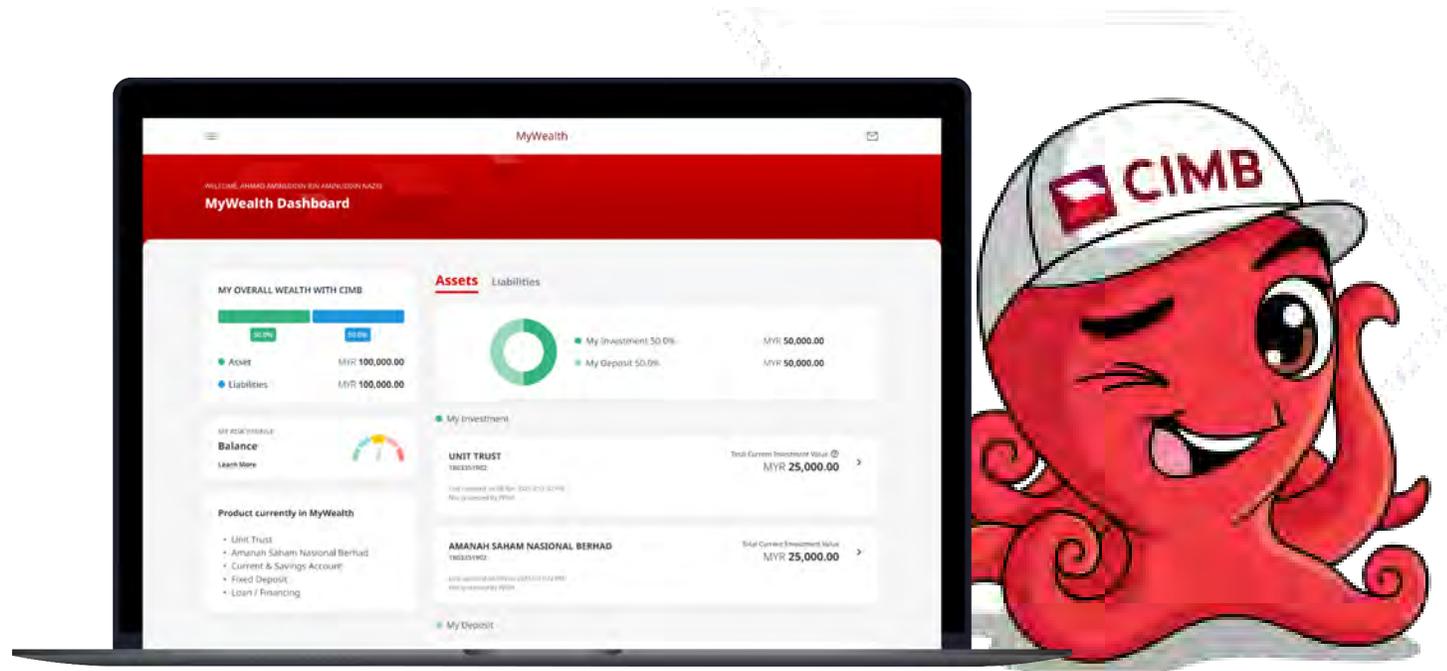
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Thank You!