Transcript of the Mutual Fund demo of the HSBC India Mobile Banking app

Here's how you can access Mutual Fund on your Mobile

Follow these easy steps to manage your Wealth on the Mobile App

Login

- Log in to the 'HSBC India' Mobile Banking App. You will see the Investment Tab in the bottom panel
- Tap the "Investment" Tab to view a summary of your holdings

Summary

- This is a summary of your current Holdings.
- Tap on "Mutual funds" to explore more funds

Explore Funds

- Here you can view your last 30 days' order status and your active SIP plans
- Scroll up to explore more funds
- Tap on 'Explore funds' to view the complete list of mutual funds available for you to invest
- You can search for funds by typing the keywords or fund name.
- You can also filter by fund house/fund type or fund category.
- Tap on any fund to know details.

Buy

- Details like funds performance, risk rating and the funds snapshot can be viewed here.
- Tap on "Buy" to proceed.
- Fill in details for the investment including amount, folio number, debit account number, nominee
- Review the details, scroll down and tap on Continue
- After confirming all the required details and review the transaction, you will get a confirmation message.
- From here you can either explore more funds or view your order status

Sell

- You can also sell your existing funds. Go to “My Holdings”> Tap on the Sell tab
- Fill in details for the investment including amount, folio number and credit account number.
- Note you can choose to sell by amount or units
- Review the details and Tap on Confirm
- After confirming all the required details and review the transaction, you will get a confirmation message.
- From here you can either trade more funds or view your order status

View

- Here you can view all your pending instructions

End of Transcript