



In today's fast paced world, effective Wealth Management is the key to achieving success.

Mutual funds are a vital investment vehicle to do that.

Our Mutual Funds online feature will help you **manage your wealth** better.

It provides **fund performance** and snapshot to help you take informed decisions.

Be it **Systematic Plans, Buy, Sell, Switch** transactions or real-time Order Status, you can do it all here!

Invest as per your risk appetite at your own **convenience**.

Here's a detailed guide to the Mutual Fund online portal.

Click on Log On

Click on the Mutual Funds tab

To initiate a Buy transaction, click here

Type your key words

Click on the down arrow next to the selected fund

Click on Buy for a lump sum investment

Click here to view an in-depth analysis on the fund

Fund snapshots are available for all transactions

Create a new folio or select any existing folio for this transaction

Select Debit Account number

Input Investment Amount

Set up Nominee details

You can add up to 3 nominees

Click here to view real-time status of all your transactions

How to initiate a Sell transaction?

You have an option of tracking your funds, analyse and compare funds here.

You can also view Markets – News and insights here

Expand Mutual Funds to view all your mutual fund holdings

Expand the selected fund

Click on Sell tab

Select Folio

Select Credit Account number

Input Units or Amount that you want to sell

Preview your order before placing the final request

Click here to view real-time status of your transactions

How to initiate a Systematic Investment Plan (SIP)?

Click here to search for funds

Type your key words

Click on the down arrow next to the selected fund

Click here

Select Folio

Select Debit Account number

Enter SIP Amount

Select Frequency from the drop down

Select SIP effective date

Enter number of installments

Preview your order before placing the final request

Click here to view real-time status of your transactions

How to initiate a Systematic Transfer Plan (STP)?

Expand Mutual Funds to view all your mutual fund holdings

Expand the selected fund

Click on STP tab

Select Folio

Input STP Amount

Select frequency from the drop down menu

Select STP start date

Input number of installments

Either scroll the list or type your key-words to select STP fund

Select debit account number

Preview your order before placing the final request

Click here to view real-time status of your transactions

Choose HSBC Mutual Funds online today

Enjoy the lifestyle that you truly deserve