HSBC | Opening up a world of opportunity

How to use the Wealth Shopping Cart

Build your investment portfolio

What is the Wealth Shopping Cart?

Wealth Shopping Cart is a facility in HSBC India mobile app to place your investment orders which you've discussed with your Relationship Manager during your previous goal planning meeting. You may choose not to revisit a branch to place an order! Your Relationship Manager will place the mutual fund schemes discussed during the goal planning meeting in your Wealth Shopping Cart and you can complete your investment order and build the portfolio of your choice – anytime and at your own pace.

Please note that the mutual fund schemes placed in the shopping cart will expire after 90 calendar days from the date the same was placed in the shopping cart, and you must confirm that your financial circumstances remain unchanged to proceed with the orders.

Placing your order via HSBC India App

Access the Wealth Shopping Cart via mobile banking and place your order in 6 simple steps:

Step 1: Select Wealth Shopping Cart on HSBC India App

- Go to 'Investment' tab, and under 'Products and Services', you'll find 'Wealth Shopping Cart

Step 2: Select the Investment Journey Note/Goal Planner Report

- Select the Investment Journey Note/Goal Planner Report that you'd like to review
- Select 'Buy' to proceed after reviewing relevant documents and order placement

Step 3: Select the products of your choice.

- You may exclude the products that you don't want to subscribe to by unchecking the top checkboxes
- Select 'Review'

Step 4: Complete the instruction details of your product.

- Select 'Complete the instruction details'
- Enter the investment account and amount for each product (investment amount can be equal to or lower than the planned amount)
- Select 'Save'

Step 5: Review declarations

- Review your order details – relevant documents (KIM, SID, etc.), product features and risk disclosures, fees and charges, relevant terms and conditions, and disclaimer – to proceed
- Select 'Confirm instruction'

Step 6: And, done!

- Your order is completed!
- You can now select 'Mutual Funds' on Investment tab to check your order

Tips to use the Wealth Shopping Cart

Get in touch with your Relationship Manager

Reach out to your Relationship Manager if you'd like to add or remove any product from your cart or have any enquiries.

Select products based on risk profile

You can select any discussed product from the cart that suits your risk appetite.

Complete the purchase within 90 days

Your product selections will remain in the cart for up to 90 calendar days from the date the same was placed in the shopping cart provided that your financial circumstances remain unchanged. In case of any changes in the financial circumstance, it is advisable that you undergo a fresh RPQ/Goal planning journey, etc.

Change in risk profile

If there are any changes in your Risk Profile, Product risk rating or expiry of the Goal Planner journey/Investment journey before the 90 days period, the products selected in the shopping cart may not be available for order placement.