

2024 | Asia



# Our Suite of Digital Capabilities at Your Fingertips



Global Private Banking

# Welcome to your Digital Ecosystem

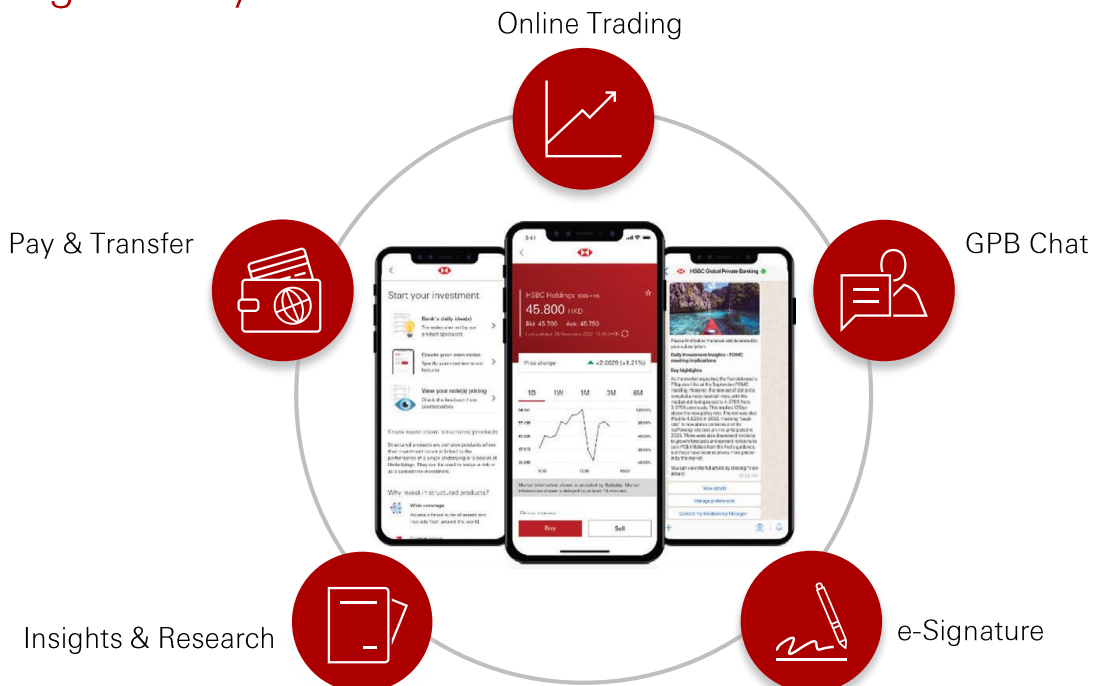


## Dear Valued Client

In this highly competitive and fast-evolving market, we are committed to making it easier for you to bank with us by creating an ecosystem of integrated digital tools and solutions to use on demand, wherever, whenever. Join us in exploring the current features we offer, and an insight into what's to come.

**Lok Kui Yim – Head of HSBC Global Private Banking, Asia Pacific**

## Your Digital Ecosystem



# Digital Showcase

Please find below, a summary of the innovative digital tools designed to empower you on your journey with us. Let your Relationship Manager assist you in exploring these latest solutions.

I want to...

## YOUR Digital Tool List



**Access my statements, investment holdings and transactions in one click**

- Access my accounts, portfolio, asset allocations, transactions and documents on the go

**Internet Banking**

- Keep informed
- Get timely reminders on things that matter

**Message Centre**  
 **Notifications** (incl. Corporate Actions)

- Use a sustainable approach to investing

**ESG metrics / dashboard**



**Make payments easily**

- Make payments and transfer funds between my HSBC accounts and to other banks / third parties

**Global Payments**



**Reach out to my Relationship Management team conveniently**

- Connect instantly with my Relationship Management team through chat and video, from my own WhatsApp / WeChat
- Share and receive documents quickly and securely

**GPB Chat**

- Connect efficiently with my Relationship Management team

**Pre-recorded audio disclosure**



**Access to carefully selected and innovative content**

- Browse research content effortlessly
- Receive insights into my investments
- Subscribe to topics of interests
- Receive updates tailored to my preferences
- Access content linked to my holdings

**Insights & Research**

- Receive via WhatsApp / WeChat, email or notifications:
  - Trade ideas
  - Product recommendations
  - Key market updates
  - Important industry developments

**Investment Insights**



**Trade products of my choice**

- Trade the products I am interested in
- Diversify my portfolio
- Seize investment opportunities

**Online Trading**

- Cash Equities
- ETFs
- Foreign Exchange
- Structured Products
- Funds
- Discretionary Portfolio Service Application

- Place order instructions from my WhatsApp/WeChat

**Authenticated chat**

- Save time and sign all documents electronically

**eSignature**



**Ease the admin burden**

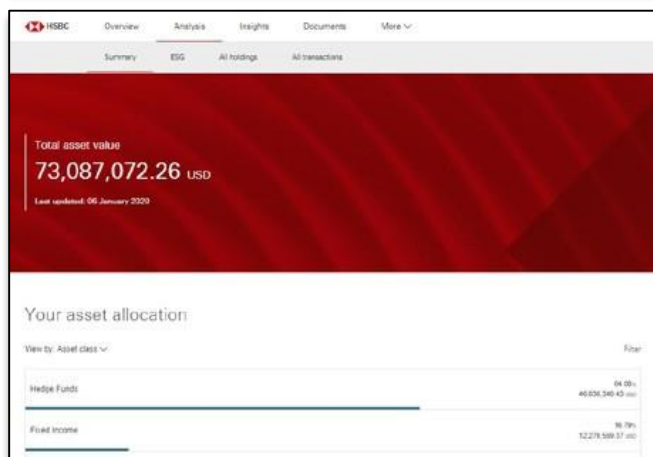
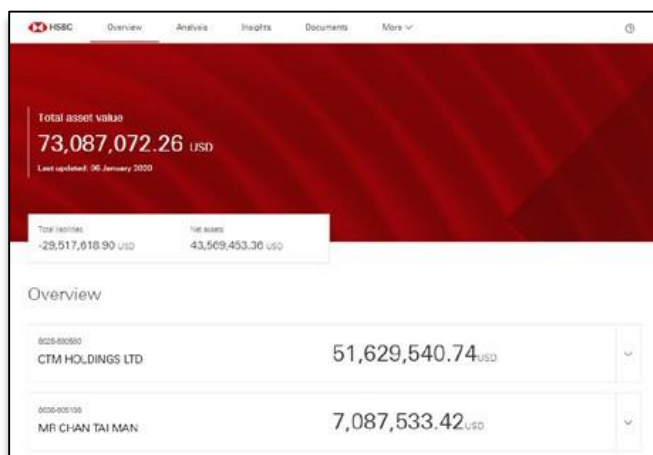
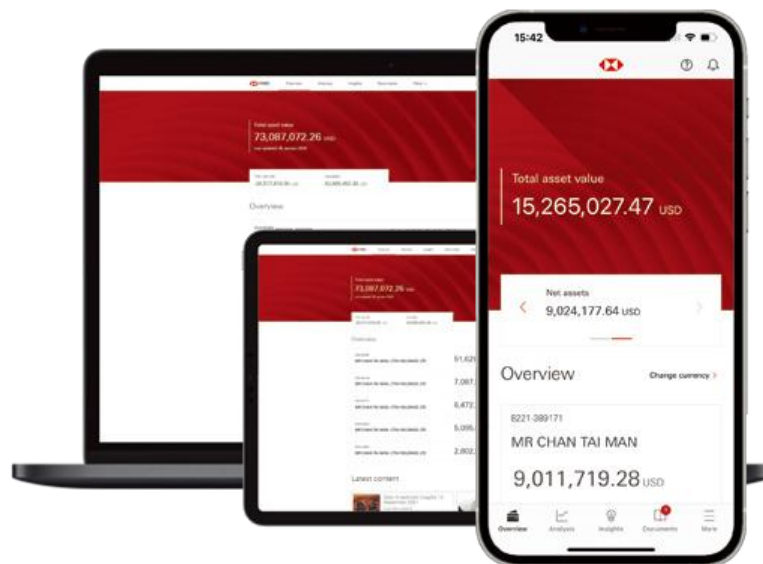
**Speak to your Relationship Manager, who will help you to register**

# Internet Banking

## Your digital journey begins here

A one-stop **internet banking** service accessible on mobile and desktop, that provides a unified view of your banking and investment needs with us.

You can also access our host of other digital services such as Online Trading, Pay & Transfer\* and Insights & Research from here.



- ◆ **A glance of your accounts** – view total assets, investment liabilities, net assets, and performance reporting across all your accounts.
- ◆ **Keep track of your performance**
  - ◆ Access each portfolio to understand your investments at a granular level
  - ◆ Visualize your end-of-month performance
  - ◆ Access a comprehensive view of your portfolio holding's, across securities, cash and liabilities
  - ◆ Monitor and keep track of transactions executed under each of your portfolio
- ◆ **Tailored Analysis**
  - ◆ Generate dynamic asset allocation charts by Asset Class or Currency
  - ◆ Monitor liabilities – total principal, total liabilities, type of liabilities and amount of each type
- ◆ Download the documents you need, related to your HSBC Global Private Banking account(s).\*

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\* Pay & Transfer is accessible via the mobile app only.

\* You are reminded to protect any downloaded document containing sensitive and personal information.

# Online Trading

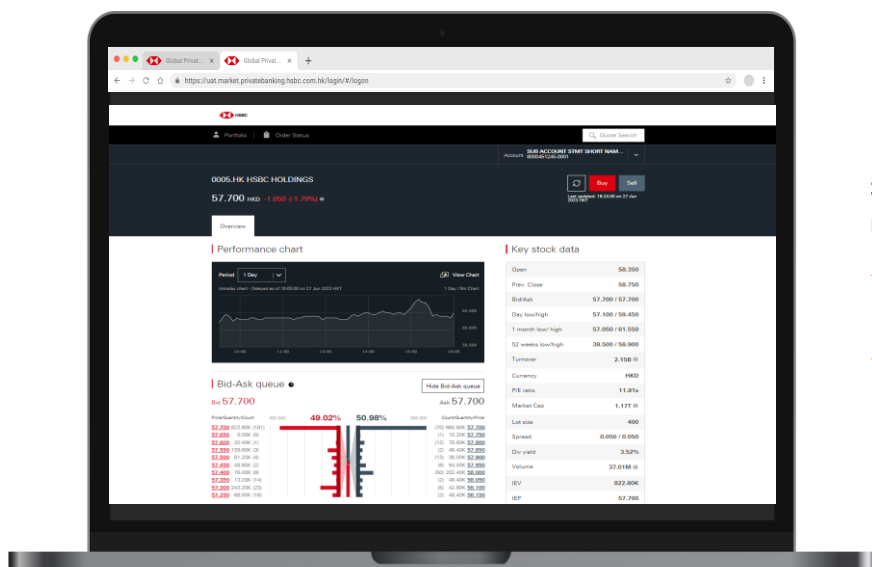
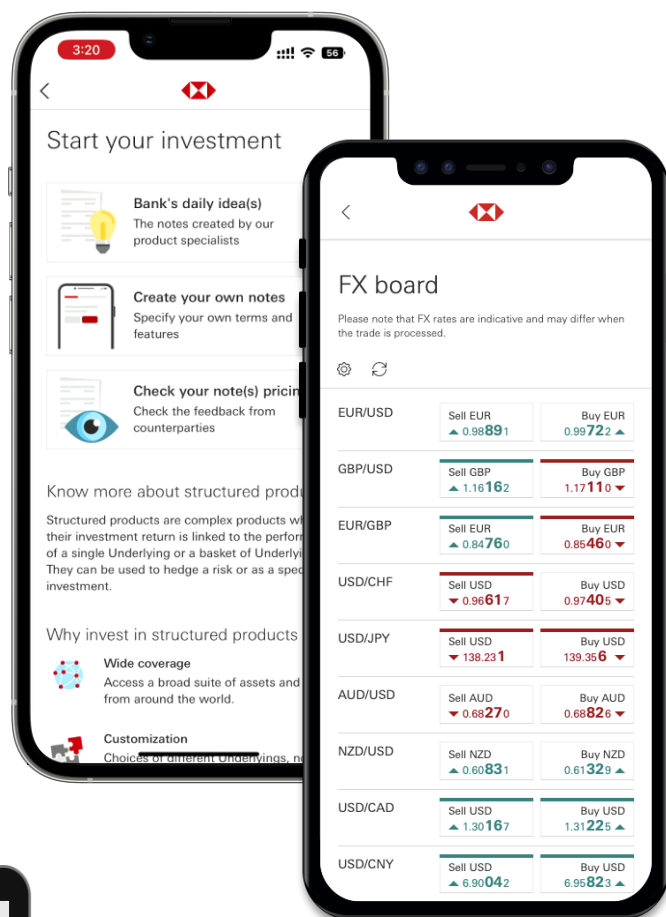
## The market at your fingertips

**Online Trading** connects you with the latest market opportunities.

With real-time data and a host of interactive tools, you can now trade anytime, anywhere.

### Manage directly from your mobile,

- ◆ Cash Equities and Exchange Traded Funds (ETFs), across 10 major markets
- ◆ Foreign Exchange Spot, Forward and SWAP Contracts in the most active currency pairs
- ◆ Structured Products, covering 8 major markets for underlying stocks. You can also structure your own notes.
- ◆ Funds, covering 2,900+ share class funds
- ◆ Discretionary Portfolio Service application



### Seamlessly trade stocks and ETFs right from your browser.

- ◆ View your performance and positions real time
- ◆ Access in-depth market information and analytics for a wide selection of stocks

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Online Trading is strictly a non-advisory and unsolicited investment platform for our clients. Any trades executed on this platform should be based solely on your judgement only.

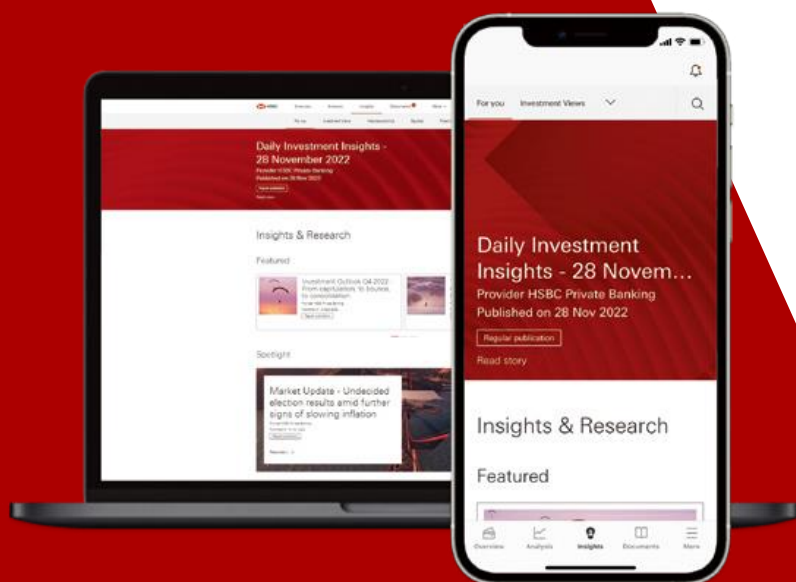
This document is provided to you for information purposes only and should not be relied upon as investment advice.

FX rates within the platform are indicative and those provided may differ to rates offered by your Relationship Manager.

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# Insights & Research

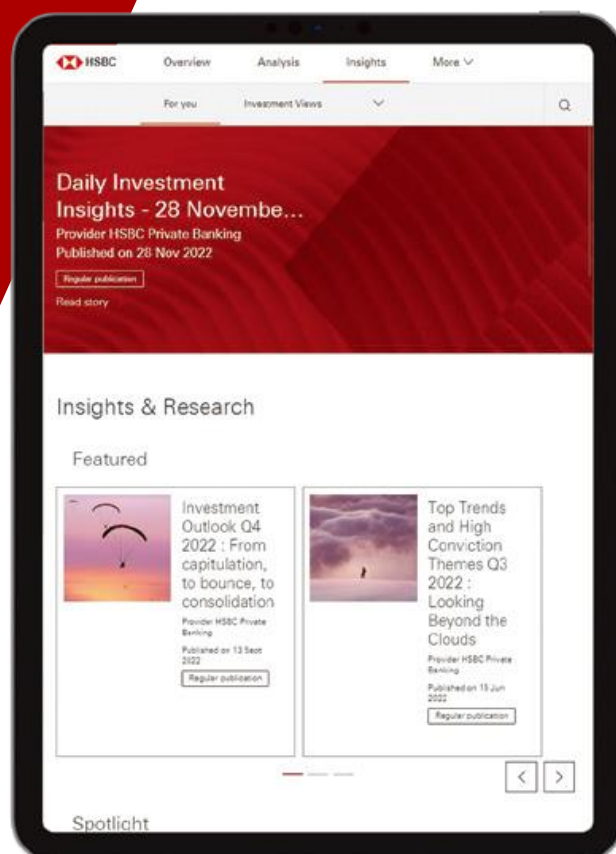
Unlock opportunities with timely insights



**Insights & Research** provides you with the latest market information anytime on your mobile and desktop, ensuring you'll never skip a beat.

With proprietary and third-party sourced content, you'll always be empowered to make informed investment decisions.

- ◆ Access relevant **research content linked to your holdings**.
- ◆ Get the **latest HSBC Global Private Banking views** with **exclusive analysis** and insights.
- ◆ Access extensive **research across asset classes**
- ◆ **Subscribe to your interests** to receive the latest publications.



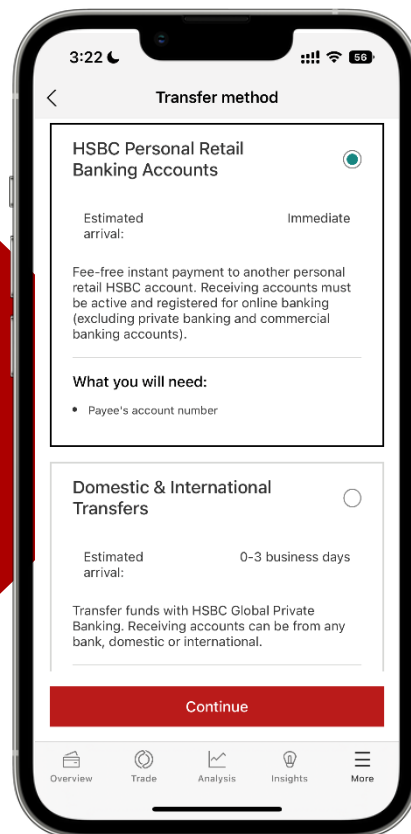
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# Effortless Finance

## Make payments easily

With **Pay & Transfer** on mobile, seamlessly make secure payments to other HSBC retail accounts or third-party beneficiaries, both domestically and/or internationally.

- ◆ **No transaction fees, simple and secure process**
- ◆ **Real-time transfers** to any **HSBC account**
- ◆ **WIRE transfer** to 200+ countries and territories around the world
- ◆ Supporting **12 different currencies**
- ◆ Up to **US\$380,000 equivalent in payments per day** out of your HSBC Global Private Banking accounts
- ◆ **Transfers up to US\$5 million equivalent** from your HSBC Wealth & Personal Banking accounts to your HSBC Global Private Banking accounts

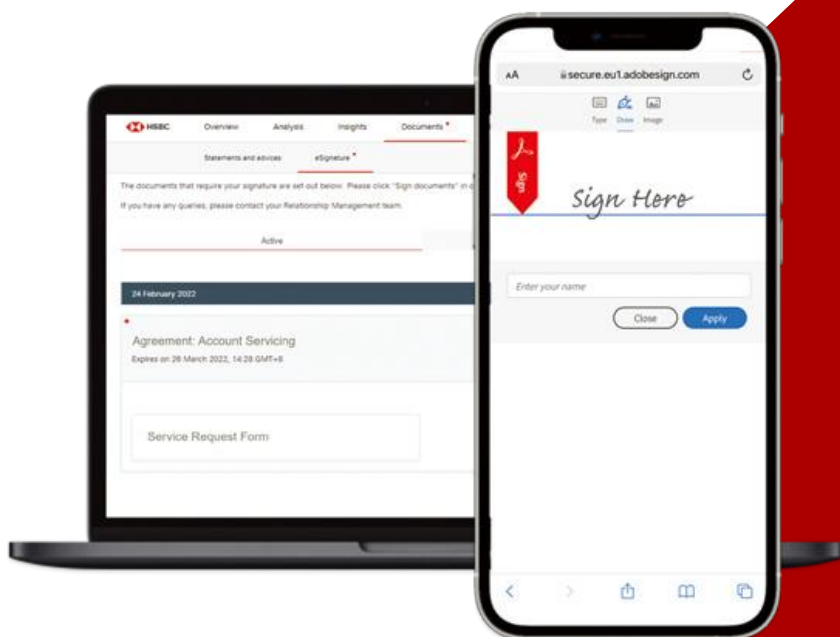


## Digitally sign your documents

**eSignature** lets you digitally review, sign and submit your documents securely.

### Sign documents in a few simple steps:

1. Receive a **notification** when a **document is ready to sign**
2. Sign by simply **typing, drawing, or by uploading an image**
3. **Submit** your documents **remotely**, via mobile or desktop



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HSBC HK App is a trademark of HSBC Wealth & Personal Banking.

Pay & Transfer is accessible via the mobile app only.

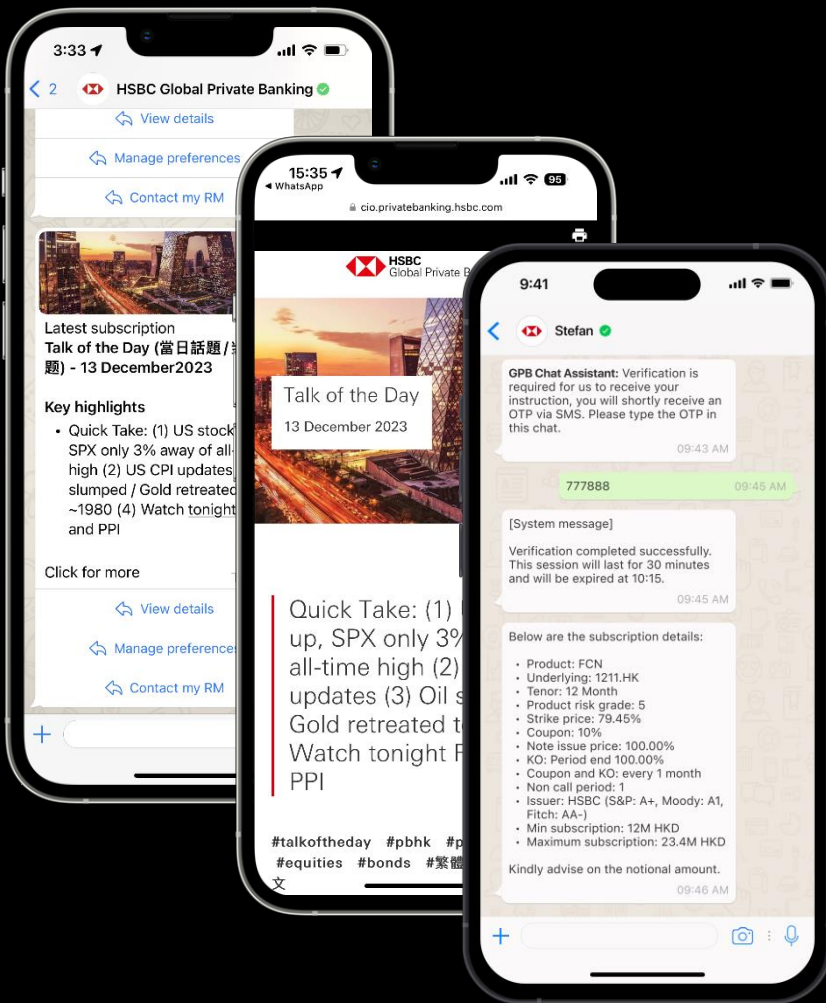
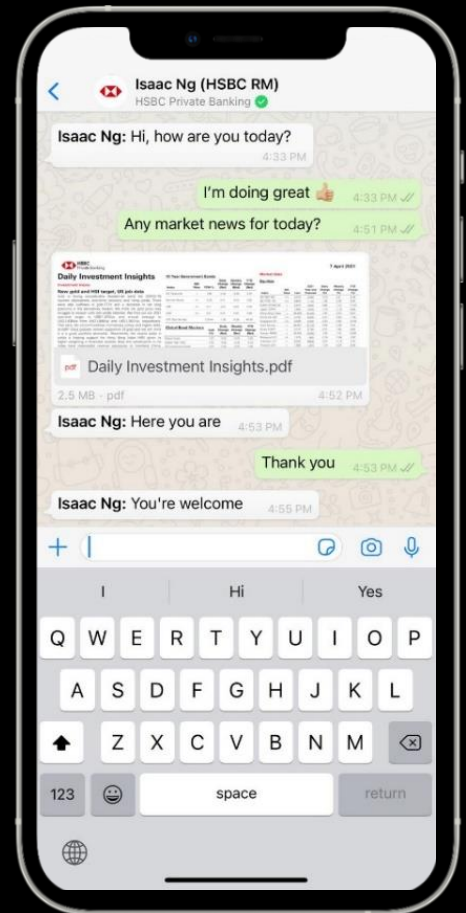
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# Elevating Connectivity

## Stays connected digitally

**GPB Chat** provides instant and secure communications with your Relationship Manager using your own WhatsApp and WeChat.

- ◆ Use your existing WhatsApp or WeChat apps or web browser\*
- ◆ Have **one-to-one chat** or **make a group call with your Relationship Management team**
- ◆ **Share** and **receive documents**
- ◆ **Safe** and **secure encrypted** channels



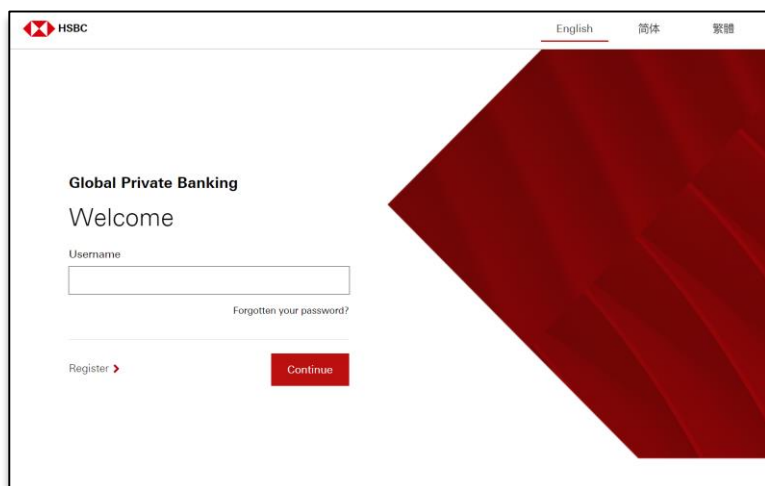
With **Investment Insights**, manage subscriptions and receive product recommendations and market updates seamlessly within the chat.

Looking for convenience? Place order instructions directly through the chat using **Authenticated Chat**.

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# Getting Started



## Step 1

**Contact your Relationship Manager**, who will help you to register to start using our suite of digital solutions

## Step 2

**Register your internet banking profile via internet browser** using the details received in your activation correspondence.



## Step 3

Log in with the credentials you registered with from the mobile app or internet browser

- ◆ **Mobile app** – Download the mobile app from the App Store or Google Play and set up your biometric authentication
  - ◆ "HSBC Global Private Banking Hong Kong"
  - ◆ "HSBC Global Private Banking Singapore"
- ◆ **Internet browser** – Visit our Internet Banking portal
  - ◆ Hong Kong: HSBC Global Private Banking Asia website > Log on > Log on to Hong Kong
  - ◆ Singapore: HSBC Global Private Banking Asia website > Log on > Log on to Singapore

## More to come...

Your digital journey continues with our upcoming digital releases.

### Self-servicing trading journey

Trade in one click after receiving a Trade Idea on your WhatsApp / WeChat

### Real time view

View your account, holdings, balances and transactions in real time

# Important information

Support:

For more information, please reach out to your Relationship Manager during business hours.

Alternatively, our Support Hotlines below are available Monday-Friday, 8:00am-9:00pm:

- ◆ Hong Kong: (852) 3604 0303
- ◆ Singapore: (65) 6658 2707
- ◆ Email: digital.concierge.asia@hsbcpcb.com

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### Security Tips for HSBC Global Private Banking Internet Banking and Mobile Banking

- ◆ Password/Passcode/User ID protection
  - For your own security, it is important that you keep your password/passcode/User ID confidential.
  - You should also change your password/passcode regularly.
  - Make sure no one sees your password/passcode/user ID at all times.
  - When choosing your password/passcode, do not use your identity card number, telephone number, mobile number, birthday or commonly used number sequences such as 888888 and 123456, or add 00 to these numbers.
  - Do not use the same or similar password/passcode/user ID for different banking or online services.
  - Memorise your password/passcode/user ID and never write it down. Keep it private and do not disclose it to anyone.
  - Under no circumstances will our bank staff, the police or any genuine parties ask for your password/passcode.
  - HSBC will never contact you and ask for your log on details and personal information for internet or mobile banking. These include your user ID, password, passcode, account number, identification/passport number, address, phone number, etc.
  - HSBC will never disclose such information in our emails other than your name for personalisation purposes, nor ask you to confirm any personal data by replying to our email.
  - When you call us, you may be asked to disclose your internet banking user ID for authentication. Do not mention your passcode or internet banking password during the call, as no call centre representative will ever ask for this over the phone. If you have forgotten your passcode, a few questions relating to your personal information (NOT your passwords or passcode) will be asked for authentication.
  - You should always take care to verify the account number of the beneficiary before effecting payment to a third party.

### HSBC Global Private Banking Internet Banking Usage Precautions

- ◆ Protect your computer
  - Install anti-virus/anti-spyware software on your computer to protect it from known viruses or spyware. The software should be updated regularly to ensure that you have the latest protection.
  - Install a personal firewall on your computer. It is designed to help prevent hackers from accessing the computer it is installed on. When installing such software, follow the manufacturer's recommendations for a "conservative" access control.
  - Download and apply security updates and patches to the PC/browser when they are made available.
- ◆ Protect yourself
  - Never access online banking from public places or from shared computers such as those in cyber cafes or public libraries.
  - Close all browser windows before you log on to online banking. While you are in an internet banking session, we recommend that you do not open other internet browsers and access other websites. This can help to ensure your financial information is protected and blocked from unauthorised access via another website.
  - Disable the "AutoComplete" function to protect against unauthorised access to your accounts and to prevent others from making banking transactions without your knowledge, as your computer may be used by others.
  - Check your last log on date, time and status displayed on the page after you have successfully logged on to HSBC Global Private Banking internet banking and mobile banking. If you suspect anything suspicious, please contact HSBC Global Private Banking immediately.
  - Use the "LOGOFF" button to exit. Do not exit by closing the window.
  - Never leave an HSBC Global Private Banking internet banking session unattended at any time.
  - Disconnect from the Internet when you have finished using it. Avoid leaving your connection on, especially with broadband access, unless you're actively using it.

### HSBC Global Private Banking Mobile Banking Usage Precautions

- ◆ Do not store your internet banking username or password on your mobile devices.
- ◆ Install and update the latest anti-virus and anti-spyware software regularly on your mobile devices, whenever they are available.
- ◆ Avoid sharing your mobile devices with others and use your own device to log on to HSBC Global Private Banking internet banking or mobile banking.
- ◆ Do not leave your device unattended after logging on to Internet or mobile banking. Always log off properly when you are finished with it.
- ◆ Only store your own fingerprints or face recognition on your device if you have biometric authentication for HSBC Global Private Banking mobile banking.
- ◆ Set up auto-lock and enable passcode lock to prevent unauthorised access of your devices.
- ◆ When using Wi-Fi connection, use trusted Wi-Fi networks or service providers and enable security protection such as Wi-Fi Protected Access (WPA), if possible.
- ◆ Use default browsers originally provided by mobile devices rather than newly installed browsers downloaded from other sources.
- ◆ Don't use any jailbroken or rooted devices, which may have security loopholes, to log on to HSBC Global Private Banking internet banking or mobile banking.
- ◆ Don't install applications from untrustworthy sources on your mobile devices.
- ◆ Always type in the address directly into the browser to avoid going to fraudulent websites.
- ◆ The HSBC Global Private Banking internet banking website has adopted EV SSL Certificate (Extended Validation SSL Certificate). For Safari browser, a padlock and the bank name will be shown in green at the top of the browser (Note: the padlock and the bank name may be hidden on some screens, and they will be shown by scrolling down the screen manually).

