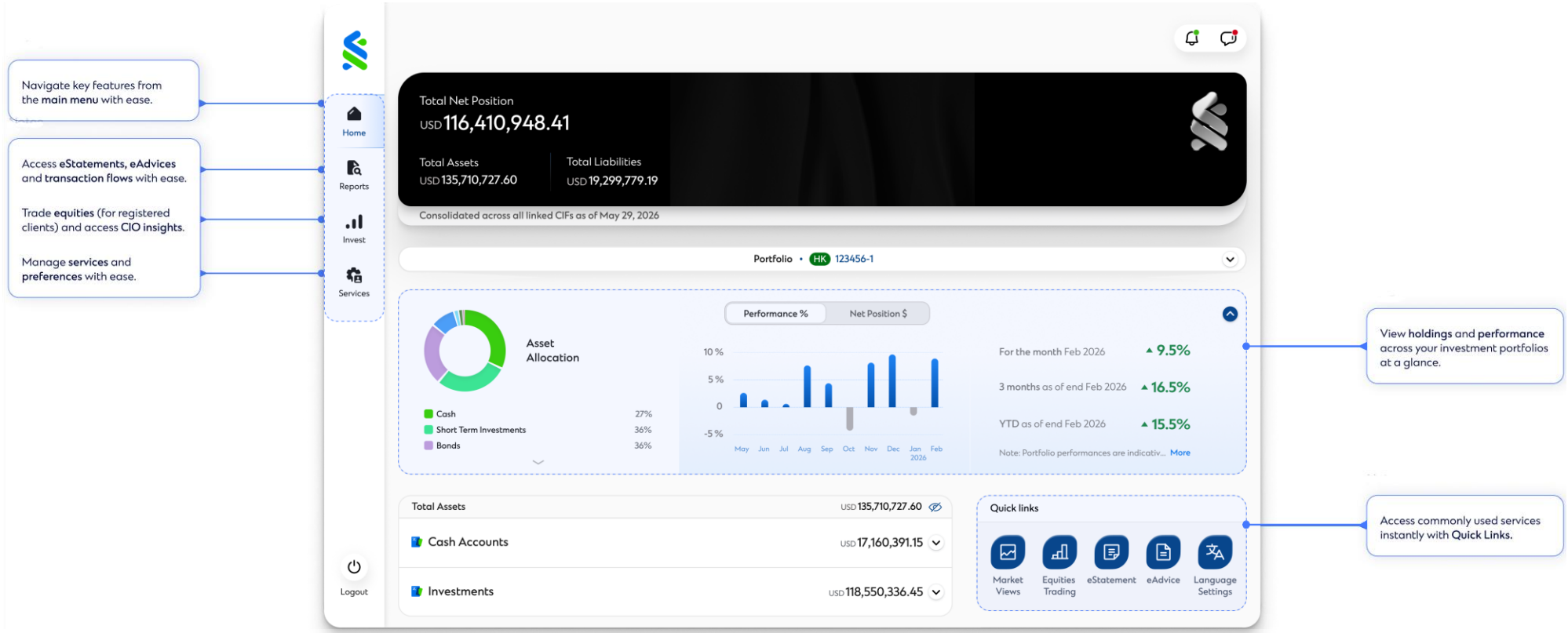
standard chartered
global private bank

SC Global Private Bank app

Desktop User Guide

SC Global Private Bank app – Stay connected to your investments

Access all your global investment portfolios in one place, giving you greater visibility over your investments, along with seamless access to reports, trading and insights.



Multi Channel Access (Mobile, Desktop)

Track Your Portfolio across global accounts

Equity Trading

Statements & Advices on-the-go

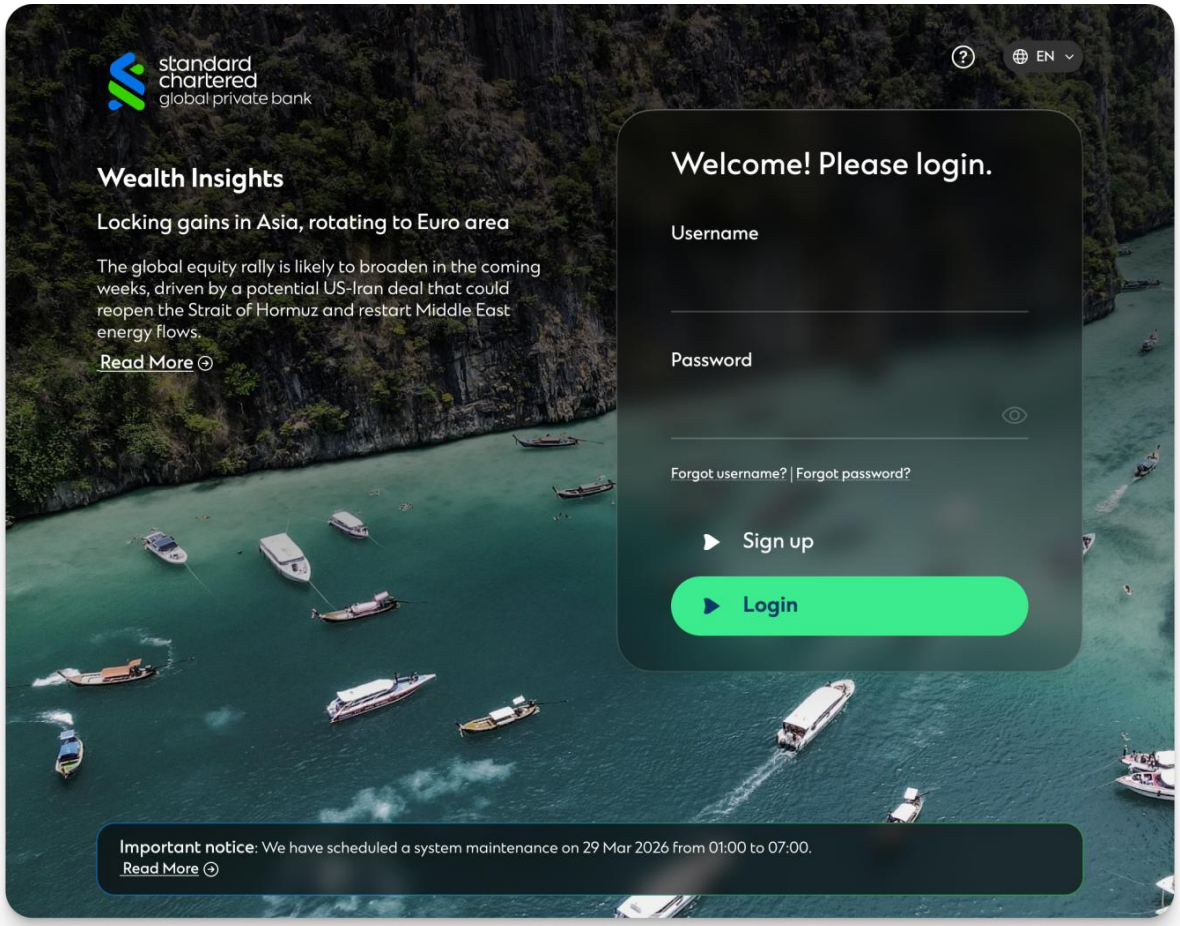
Market Views on-the-go

Digital Collaboration

Multi Language English & Chinese

Accessing SC Global Private Bank app on Desktop

Access the SC Global Private Bank application on your desktop by visiting
https://pvm.standardchartered.com/pvb/#/login



Contents

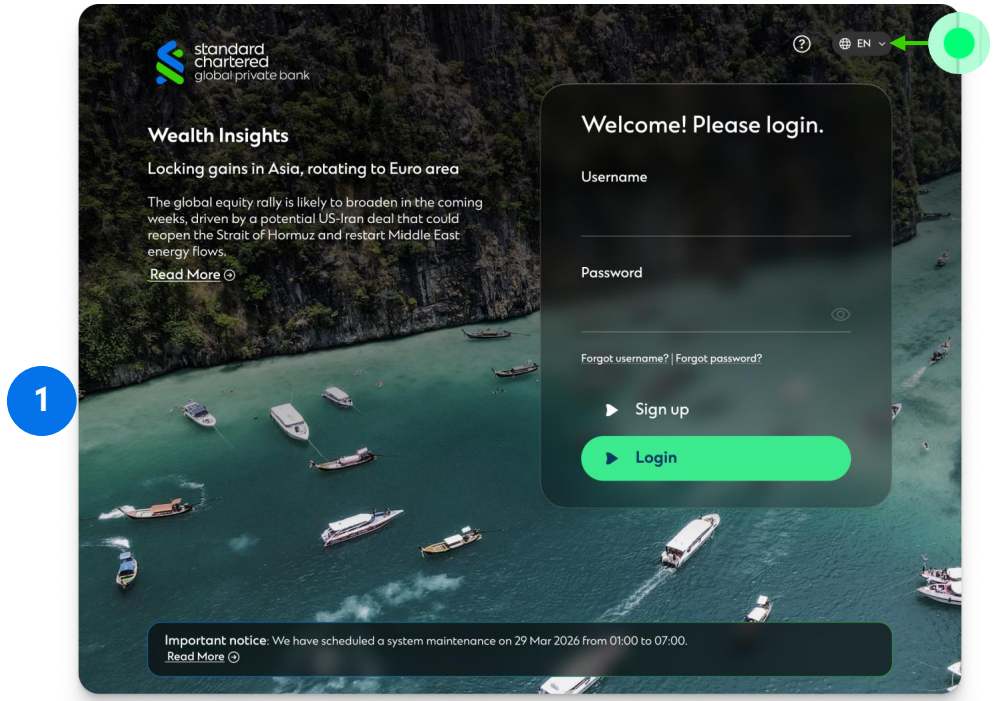
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Collaboration 28
Notifications 36
Manage Your Preferences 40
User Access Management 48
Help & About 54

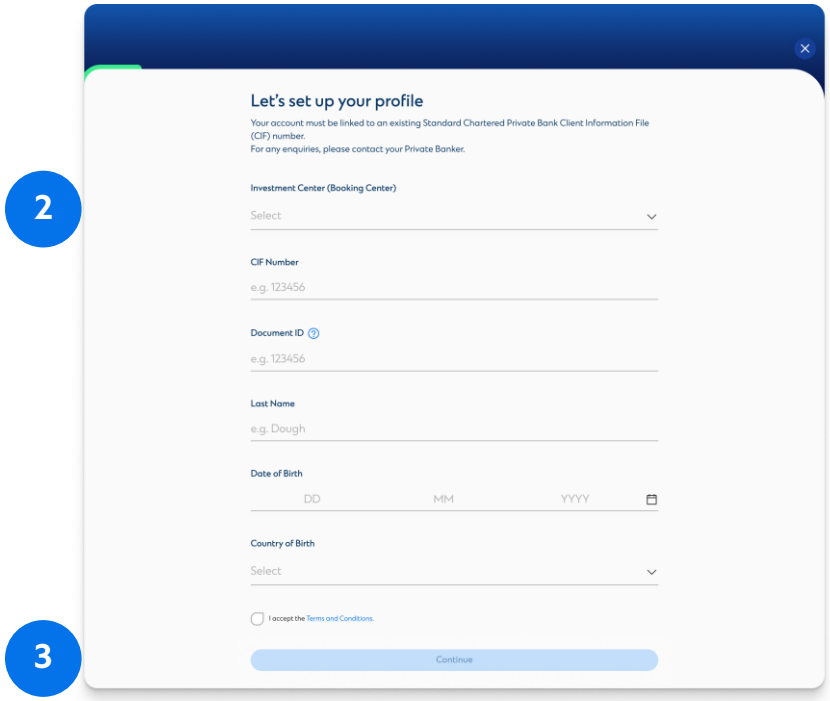
PUBLIC

Registration and Login

Registration

The information you provide for registration will be verified against your profile held with us.
Speak with your Private Banker to ensure your contact details are updated before you register.





1. Click **Sign up** on the pre-login screen

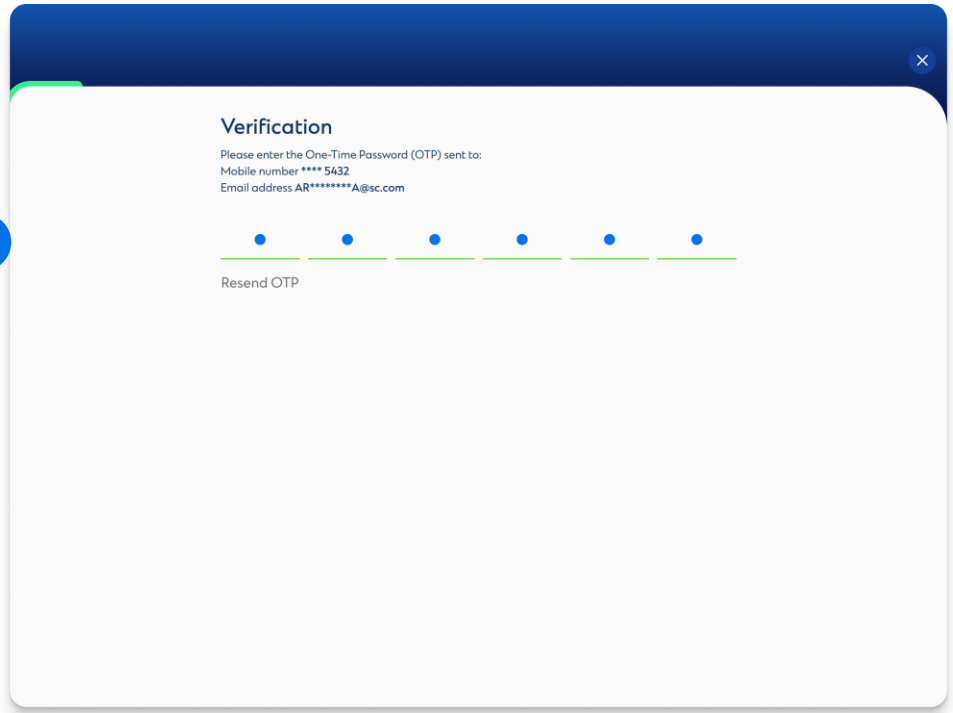
2. Key in your details to register
   - Investment Centre (Booking Centre)
   - CIF Number: Enter numbers only (no suffix)
   - Document ID (provided during onboarding e.g., Passport ID, National ID etc.)
   - Last Name.
   - Date of Birth
   - Country of Birth

3. Accept the Terms and Conditions and click **Continue**

Change to your preferred language to English, 简体中文 (Simplified Chinese) or 繁體中文 (Traditional Chinese) by using the language selector EN on the top right of the page.

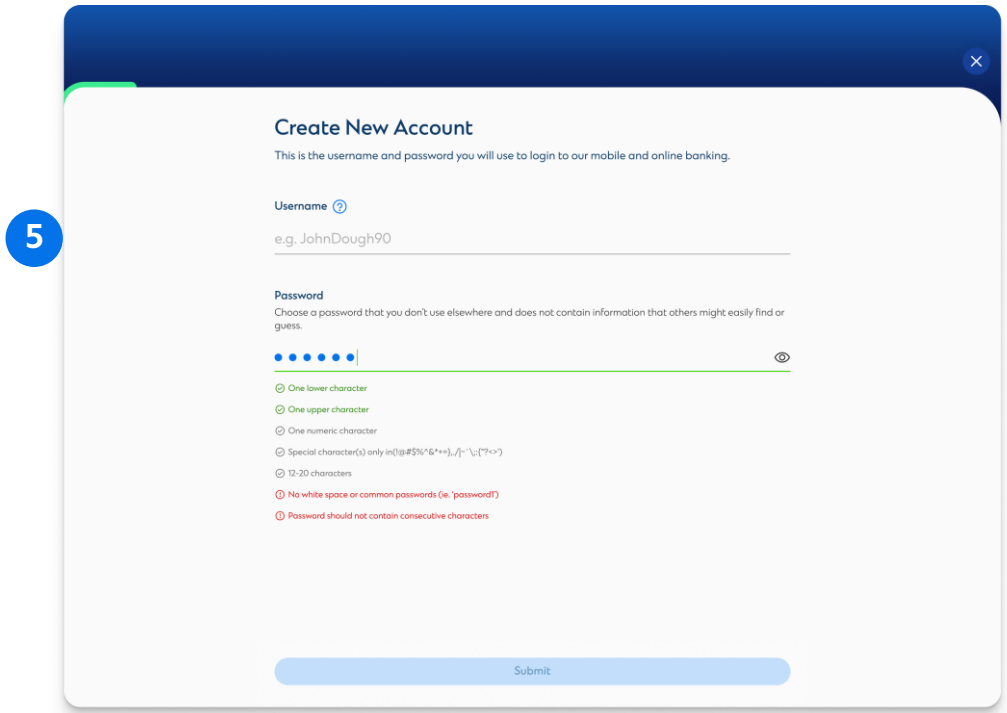
Registration (continued)

Upon successful registration, you will be able to login and view your consolidated Private Banking accounts globally.



4 Enter the OTP sent to your registered mobile number and email address.

If you do not receive an OTP, click **Resend OTP** or contact your Private Banker.



5 Create a unique Username and Password using alphanumeric characters and **Submit**. Your registration is now complete.

Please login with the created username and password to access SC Global Private Bank app.

If you are using a different mobile number, please contact your Private Banker.

About Document ID in Registration

We accept the following types of document ID. If you are unsure of the document ID in our records, please contact your Private Banker.

- Passport
- National ID Card
- Resident ID Card
- Work Permit
- Driver's License
- US Green Card
- US Social Security Card
- Voters ID
- Grant of Probate
- Armed Forces IS Card
- EU National Health ID
- Taiwan Mainland Travel Permit
- Hong Kong / Macau valid Exit-Entry Permit
- Permanent Account Number (PAN) Card

- *Note that we do not accept Aadhaar card number (i.e., India's unique identity number) for registration.*

! Please read the Terms and Conditions before you accept them.

The information you provide for registration will be verified against the data we hold in your bank records. Please ensure that we have your updated data on file.

If we are unable to match the information provided during registration to the data in our bank records, you will be notified and requested to contact your Private Banker.

PUBLIC

View Your Portfolio

A consolidated view of your portfolio

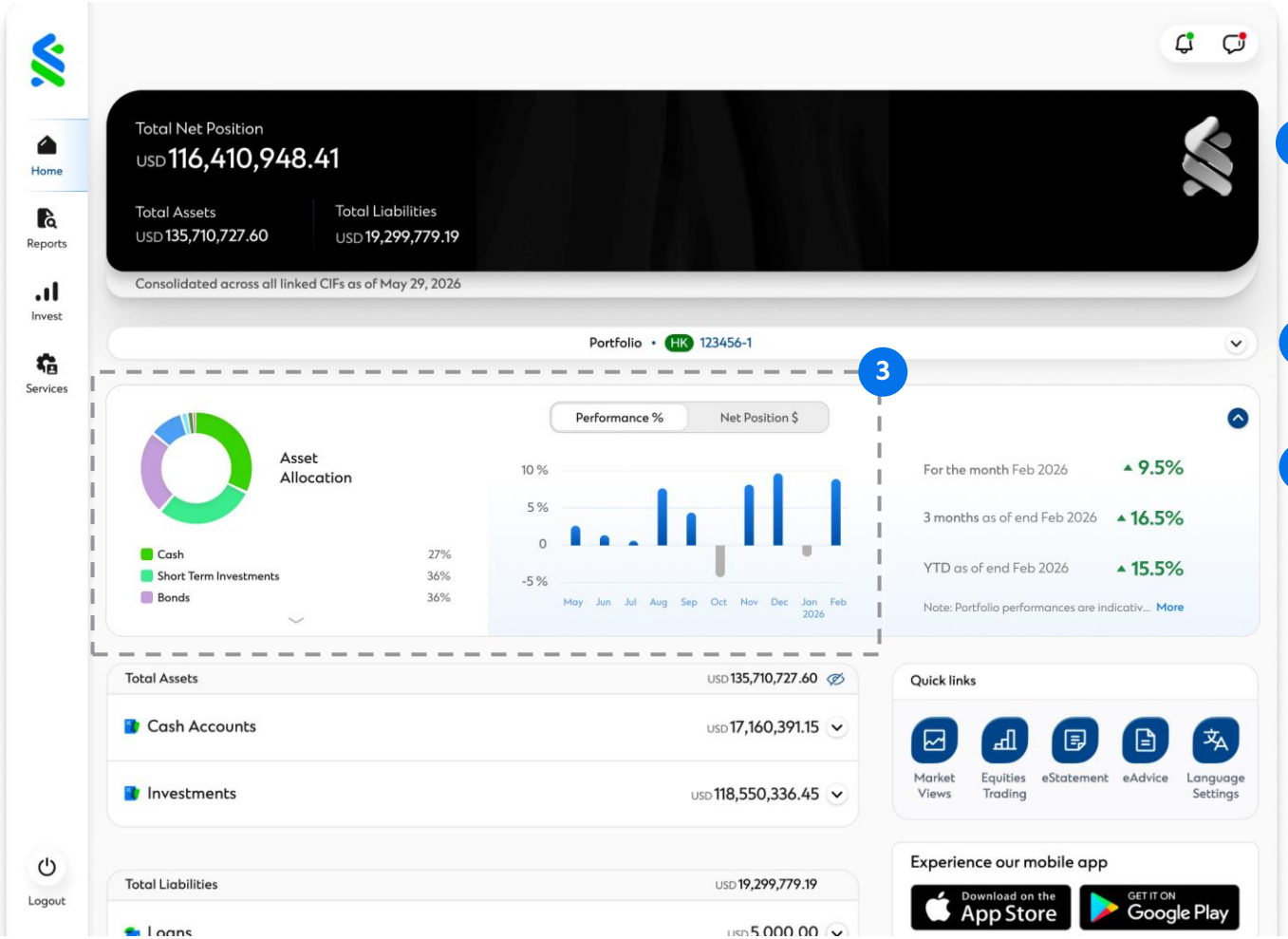
View your overall portfolio position, performance and holdings.

1. Your **Total Net Position** across all your portfolios.

2. **Portfolio Selector** – Switch between your portfolios using the selector dropdown.

3. Refer to **Asset Allocation**, **Performance %**, or **Net Position $** to view the breakup of your holdings, an indication of your portfolio's performance, and the value of historical net positions for the selected portfolio.

4. **Portfolio Performance** – View your portfolio's performance at a glance:
   - For the month <mmm yyyy>
     e.g., For the month Feb 2026
   - 3 months as of end <mmm yyyy>
     e.g., 3 months as of end Feb 2026
   - YTD as of end <mmm yyyy>
     e.g., YTD as of end Feb 2026



Portfolio holdings and account balances are typically reflected as of previous business day; but may vary depending on certain markets and settlement timelines.

A consolidated view of your portfolio (continued)

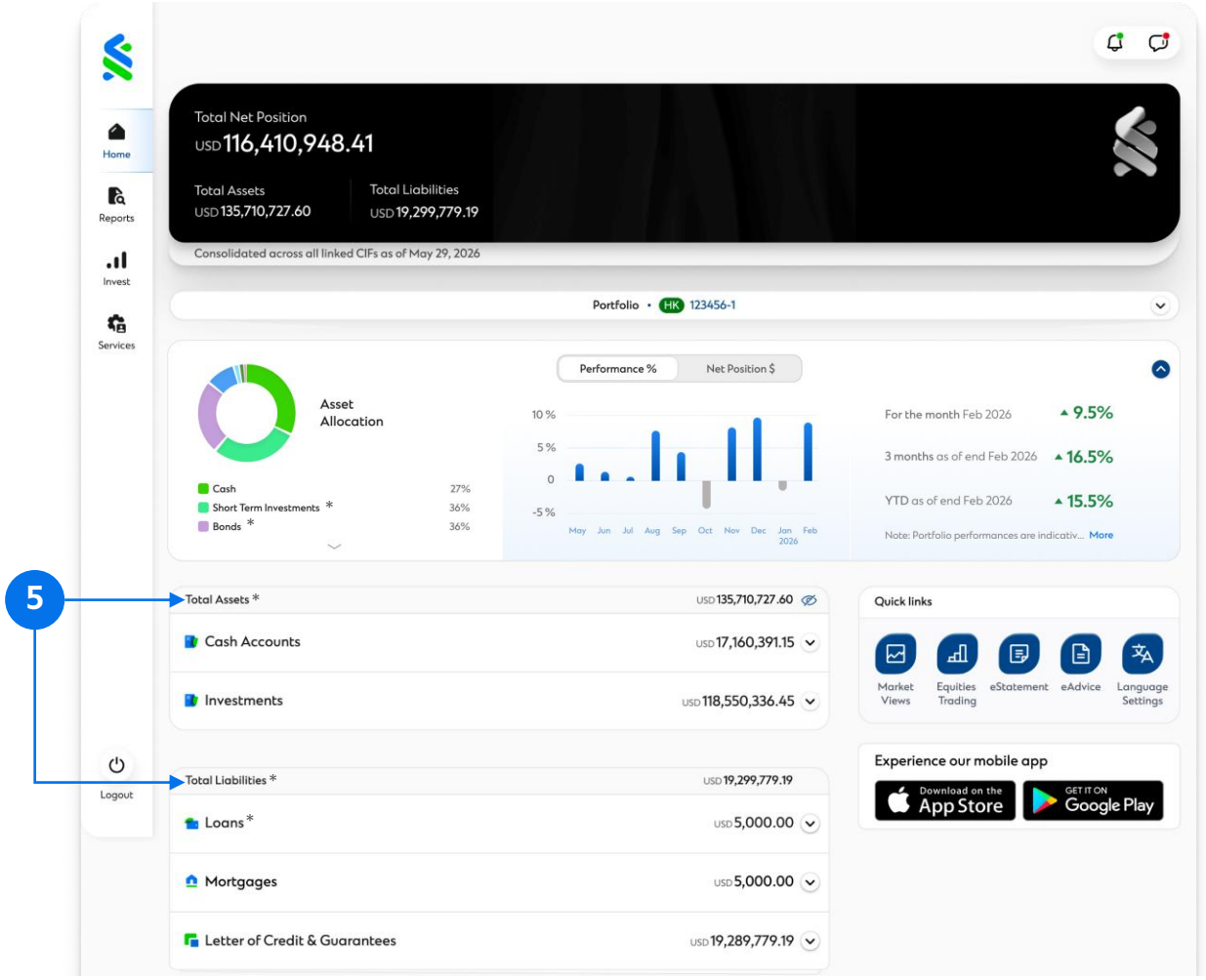
View your Total Assets, Total Liabilities and overall portfolio allocations in a glance.

5 Displays **Total Assets** and **Total Liabilities.**

Under **Total Assets**, you will find your **Cash Accounts** and **Investments**.

Under **Total Liabilities**, you will find your **Loans**, **Mortgages**, **Letter of Credit & Guarantees**.

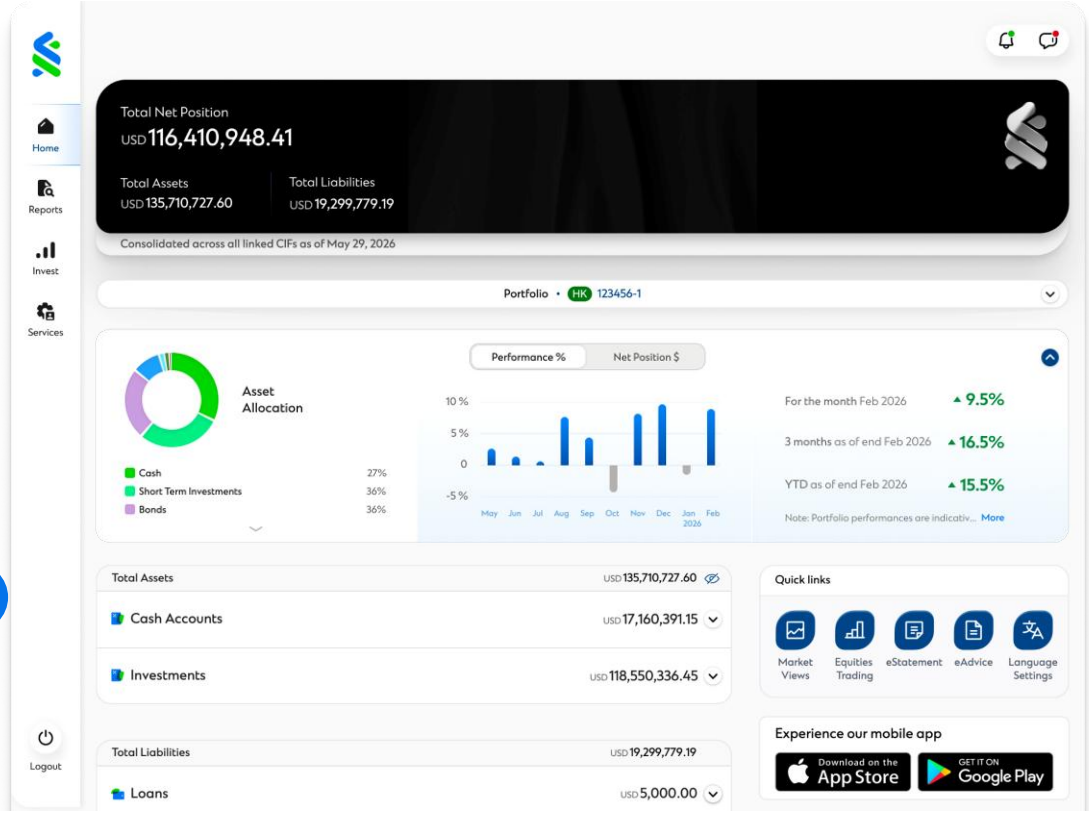
Click any category to explore the underlying holdings and positions in more detail.

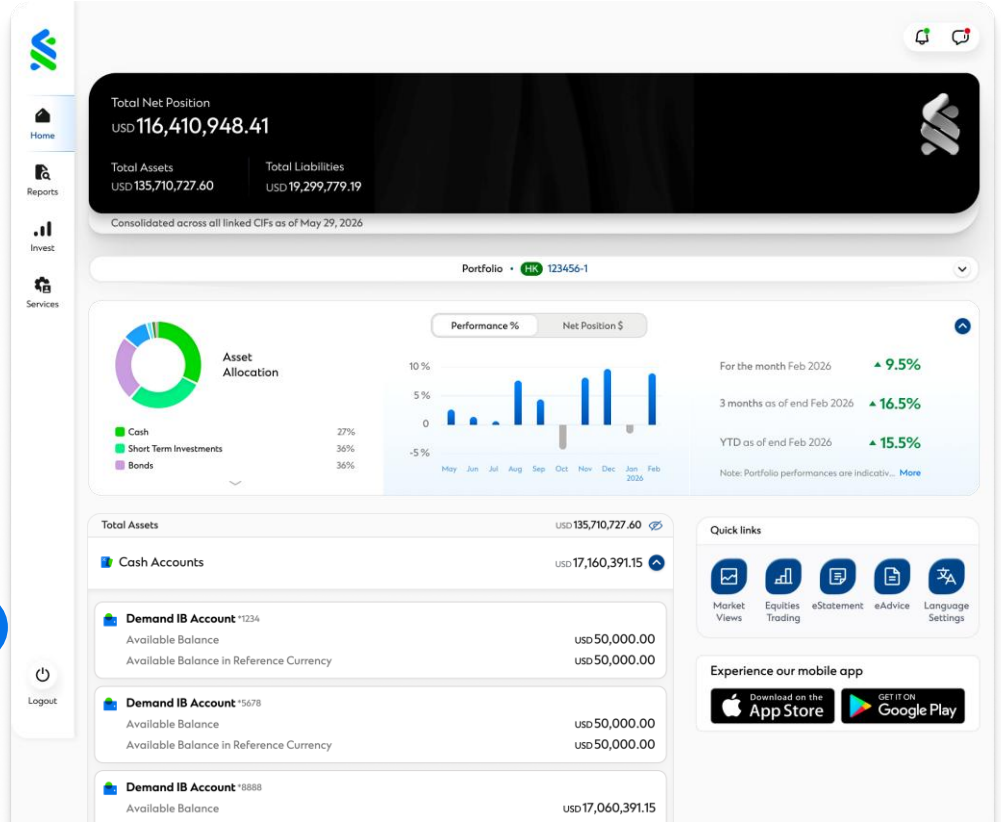


* Refer to the Important Information section for important notes for any Islamic products.

View Your Portfolio – Cash Accounts

View all your Cash Accounts and transaction activity.





1 Click **Cash Accounts** to view all your cash accounts.

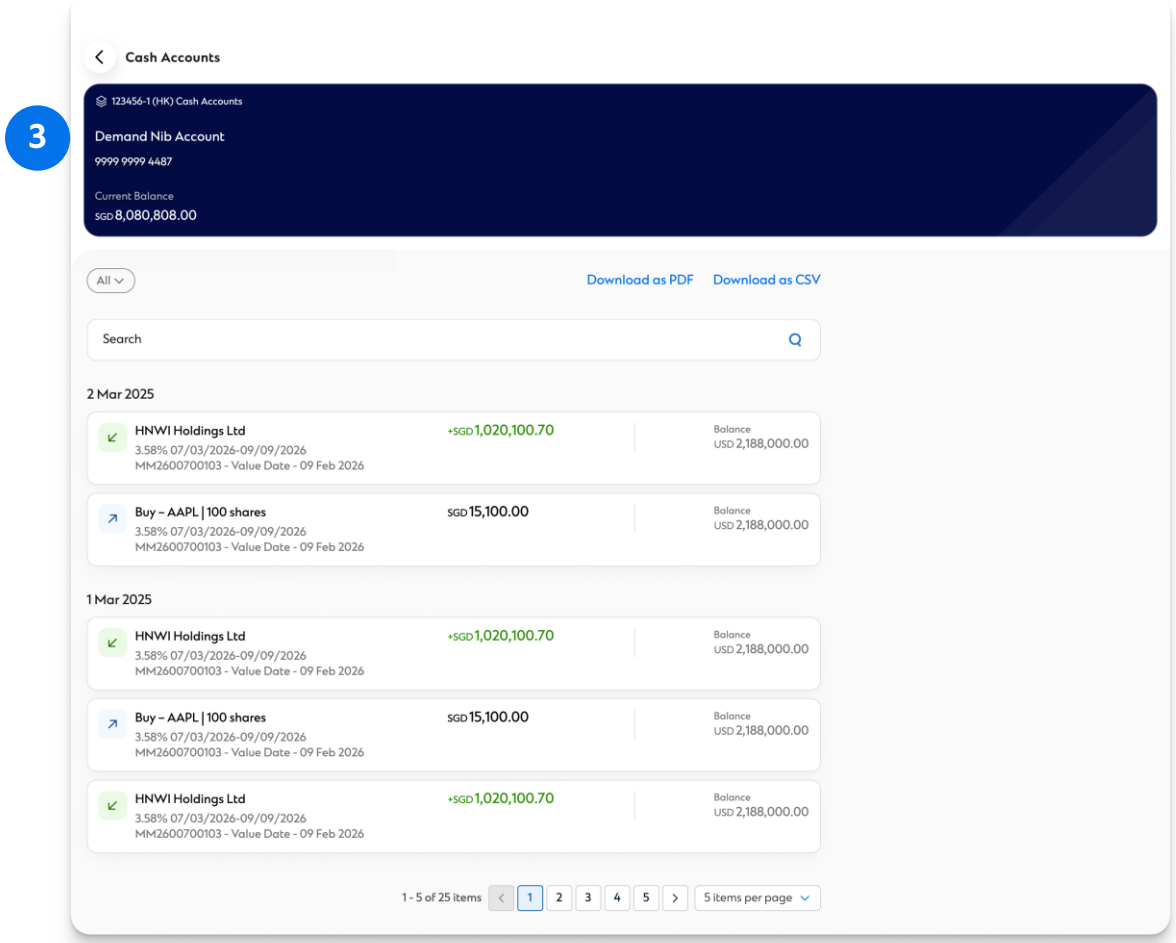
2 Click any cash account you wish to view for further details.

View Your Portfolio – Cash Accounts (continued)

3 View transaction details under cash account.

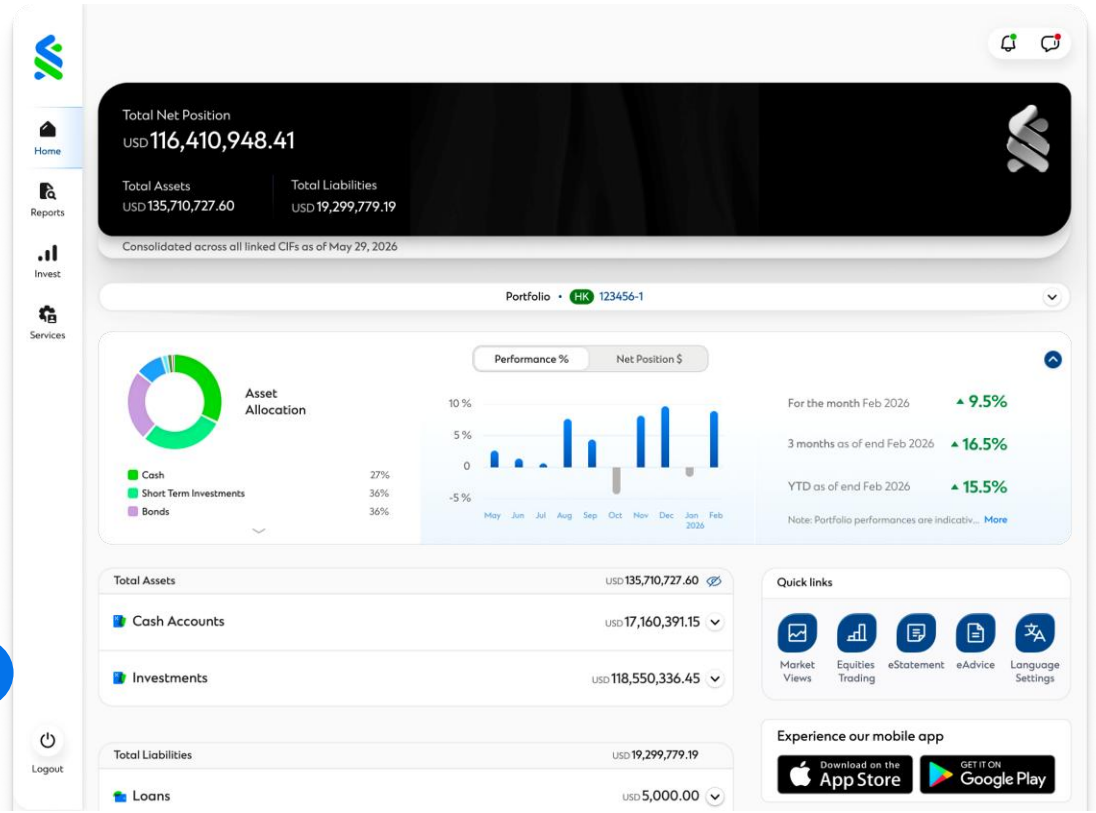
Search for transactions using keywords.

Download transaction data in PDF or CSV format.

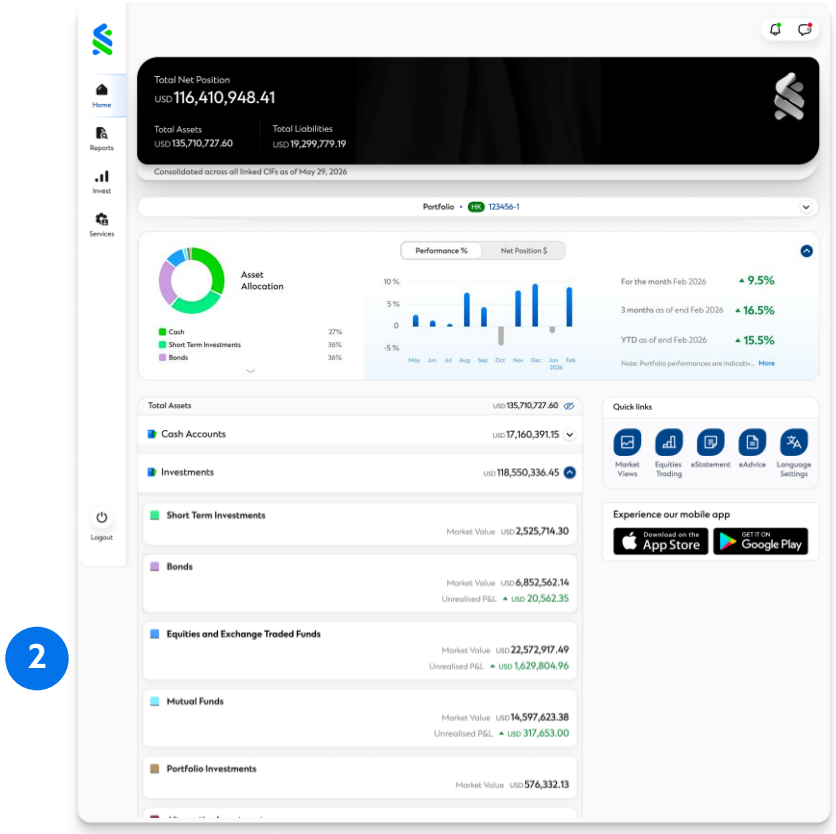


View Your Portfolio – Investments

View your Investments across asset classes and access details of your portfolio holdings and performance.



1

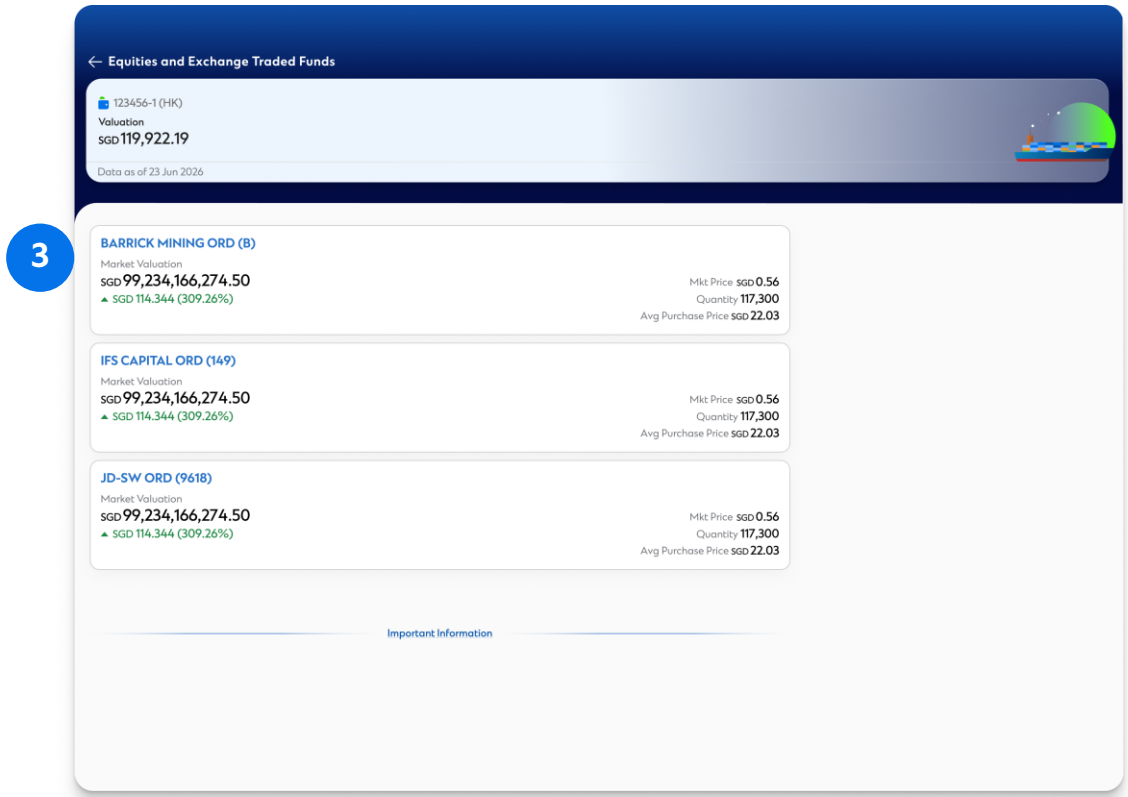


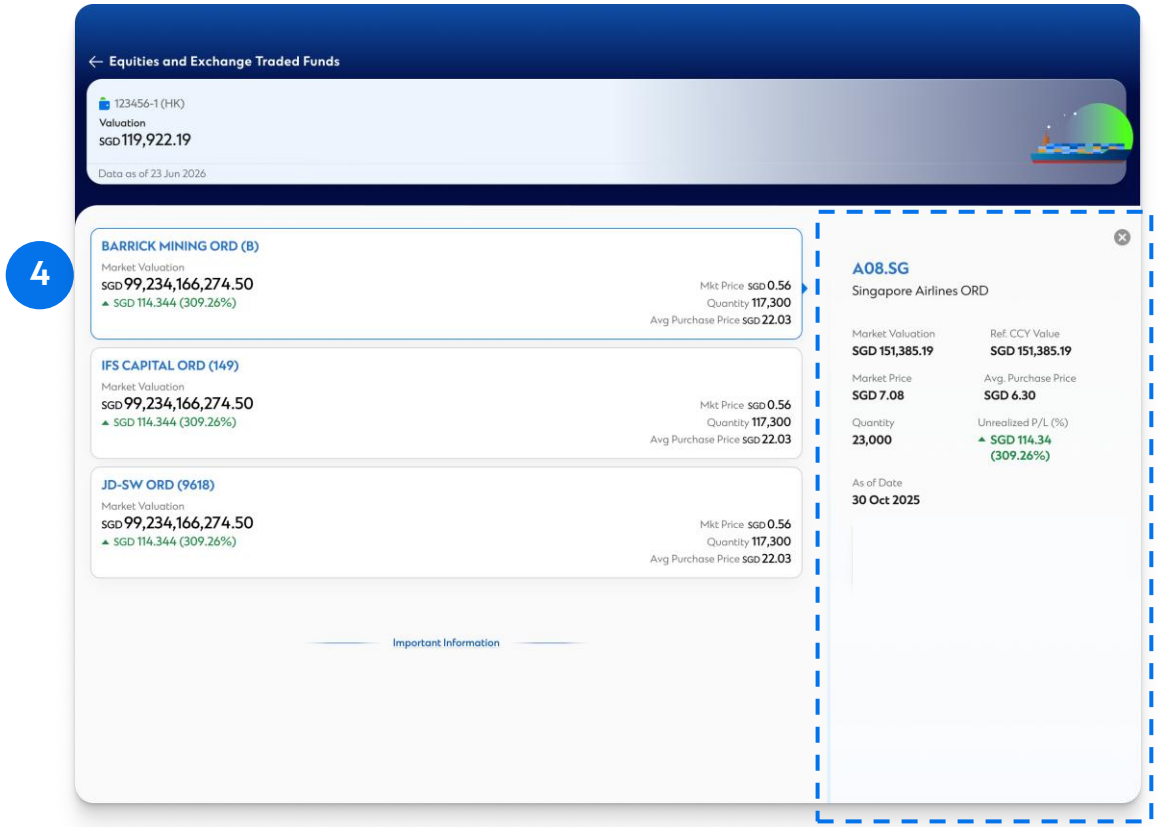
2

1 Click **Investments** to view your investments.

2 Click any asset class you wish to view for further details (e.g., Equities as shown above).

View Your Portfolio – Investments (continued)



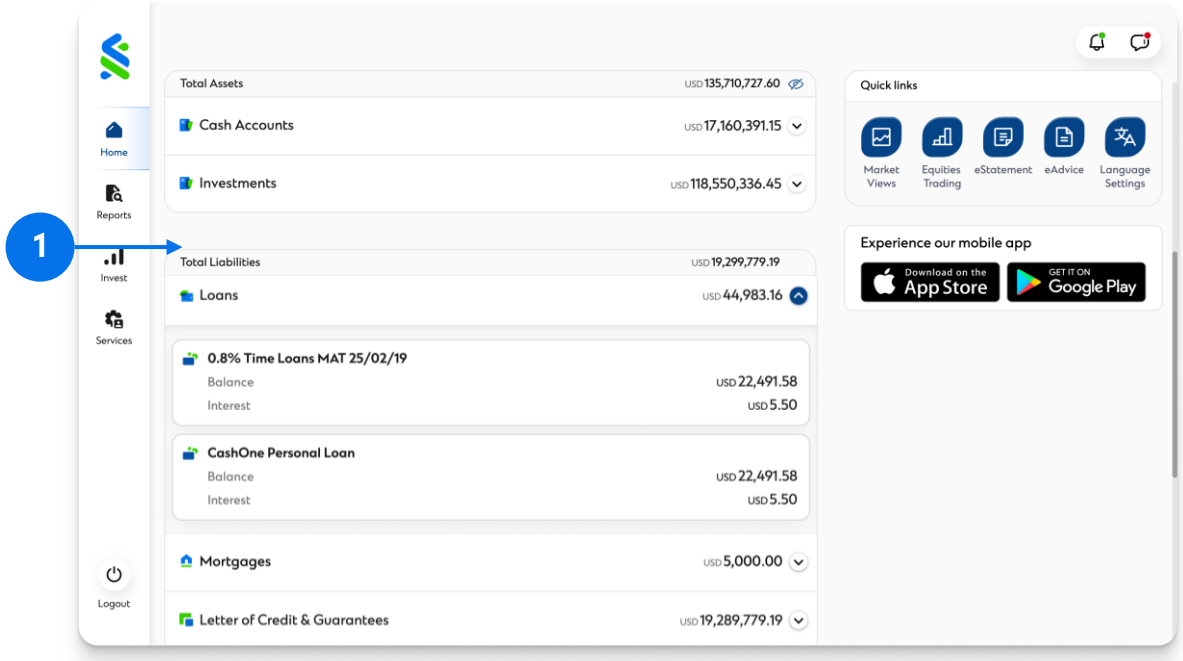


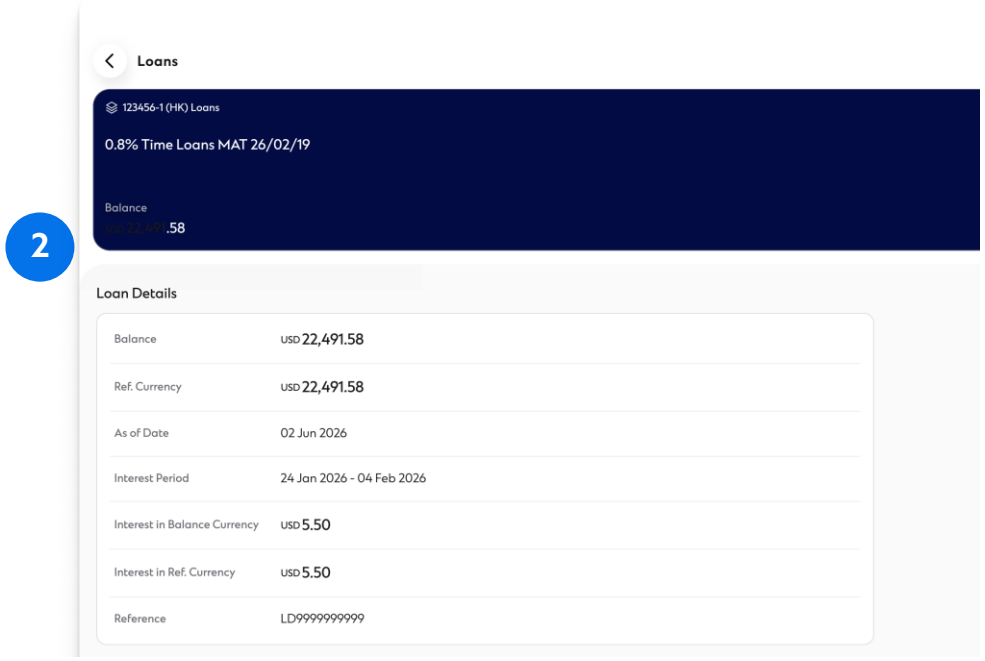
3 Displays a view of your holdings under the asset class (sorted by stock name for Equities).

4 Click on any specific holding to view further details. Details will appear on the right side.

View Your Portfolio – Liabilities

Stay informed on your Liabilities across Loans, Mortgages, Letters of Credit & Guarantees to get a clear overview of your borrowing arrangements.





1 Under **Total Liabilities**, facilities are grouped by category, such as Loans, Mortgages, and Letters of Credit & Guarantees.

Select a category to view the related facilities and key information (e.g., Loans as shown above).

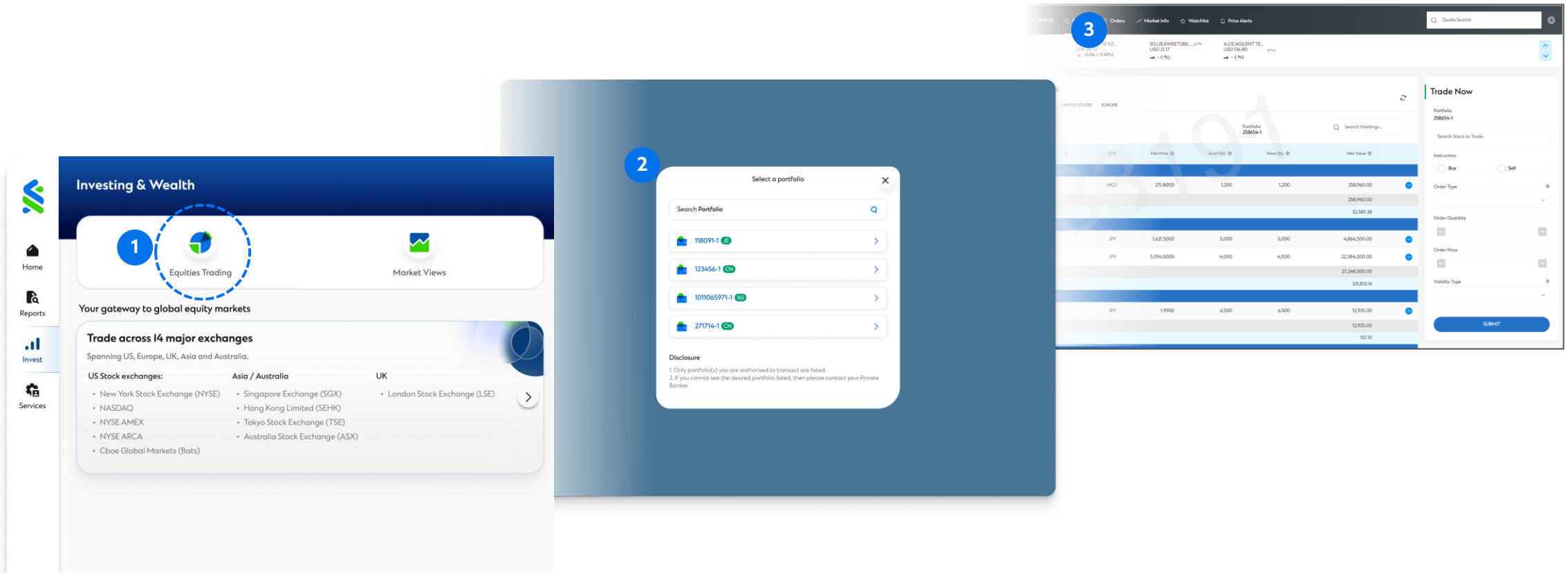
2 View detailed information on clicking the individual facility.

PUBLIC

Investing & Market Insights

Equity Trading - Trade in leading stock exchanges globally

Navigating to the Equities Trading platform.



1. Go to **Invest** and then click **Equities Trading**.

2. Select the desired portfolio and proceed.

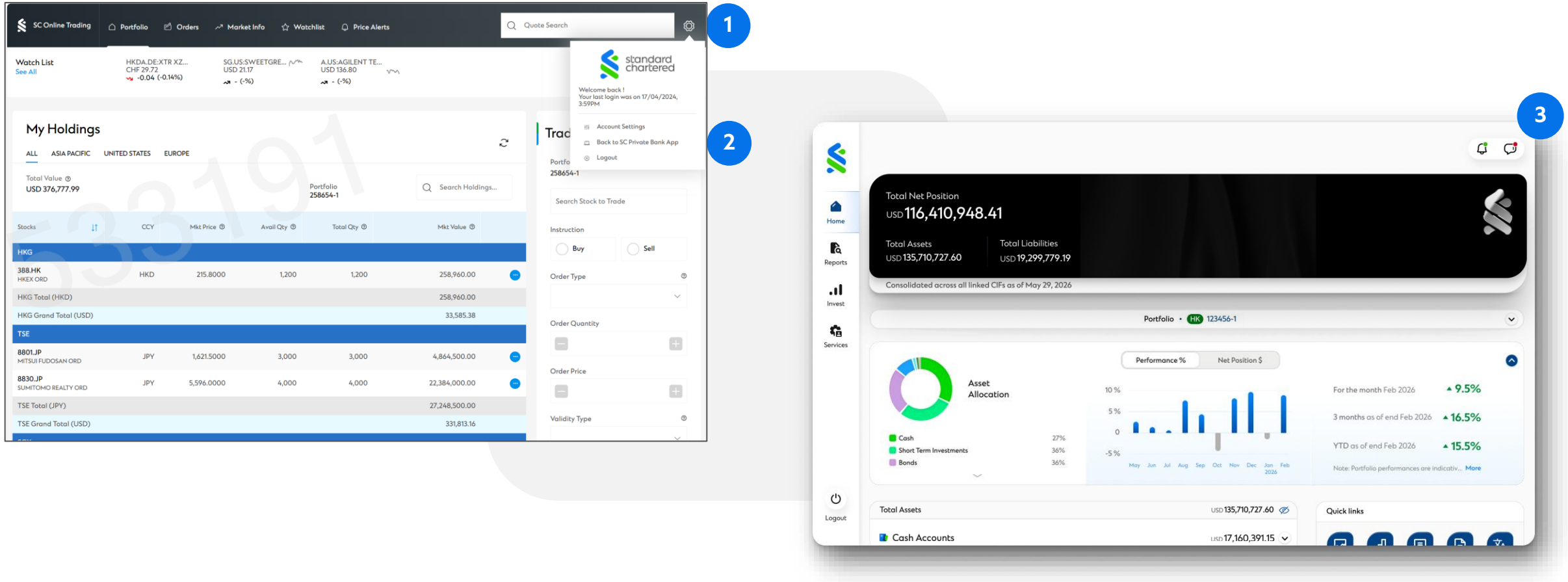
   Only Portfolio(s) you are registered for and authorised to trade will be listed

3. You are now on the Equities trading platform.

In cases where **Equity Trading** is not yet enabled, a message will be shown for you to contact your Private Banker for assistance on Step 1.

Equity Trading - Trade in leading stock exchanges globally

Navigating back to SC Global Private Bank app from Equity Trading platform.



1 Click the ⚙ icon at the top right of the screen.

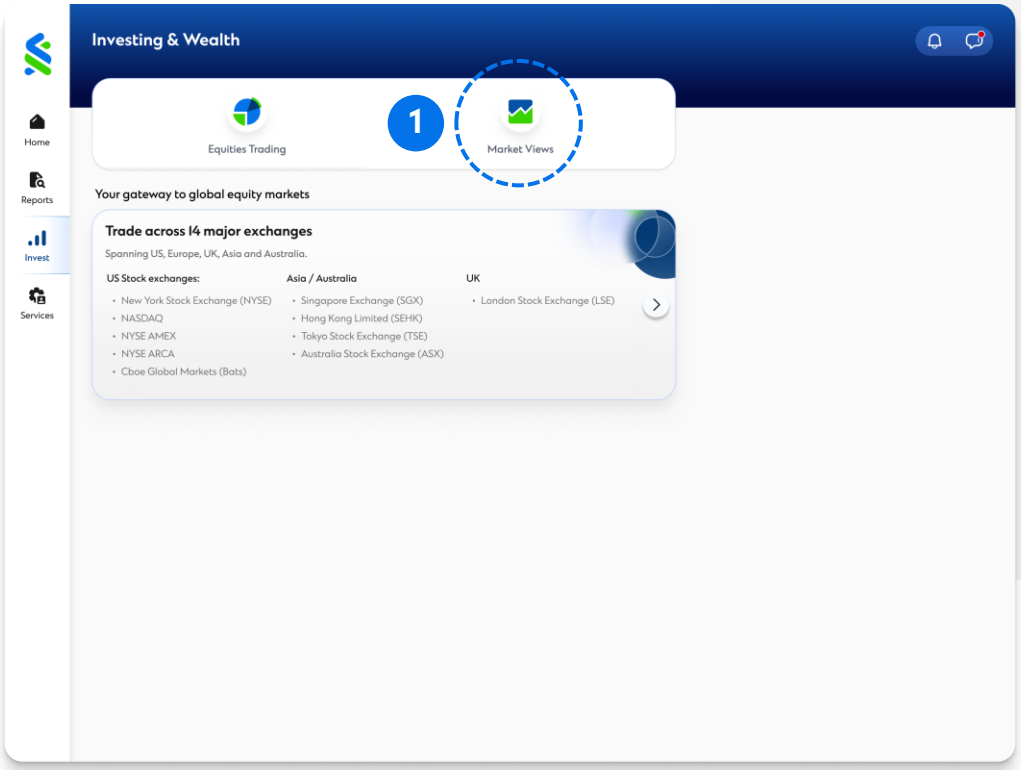
2 Click **Back to SC Private Bank App** to navigate back to the app.

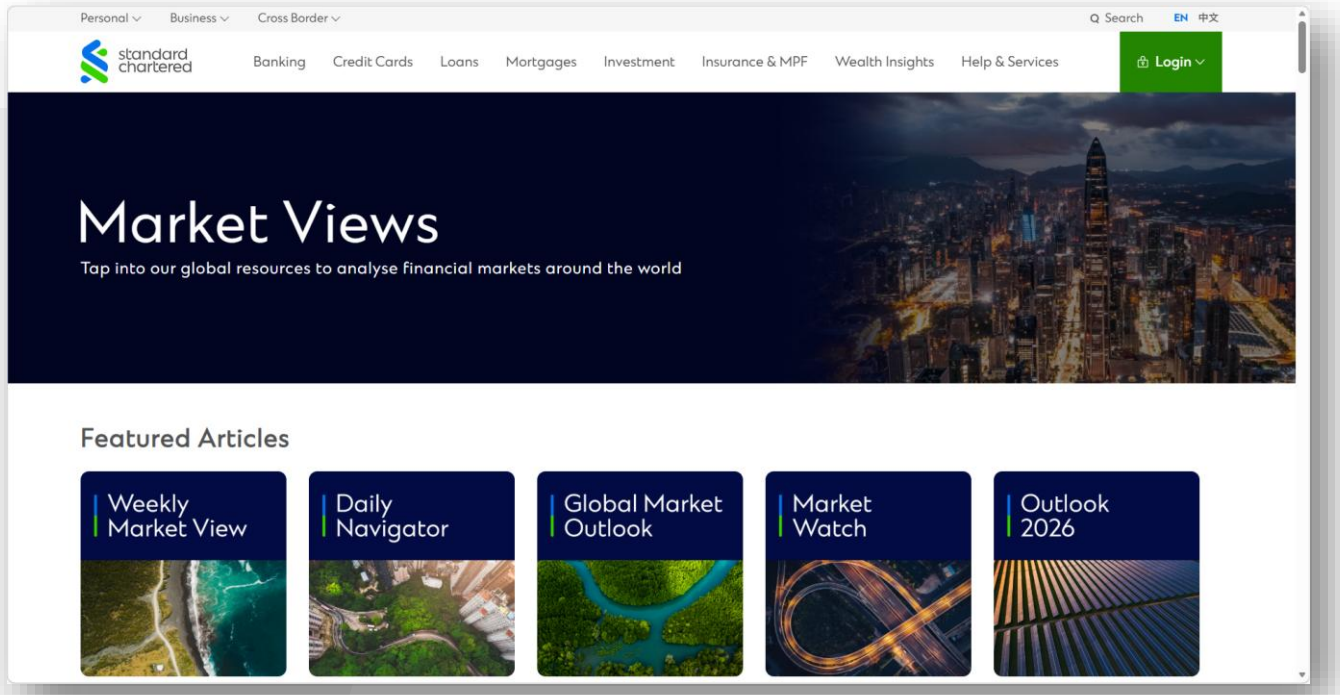
3 You will be able to navigate the SC Global Private Bank app.

Market Views - Stay updated with market insights

Access Market Views on-the-go to stay updated with insights from our Chief Investment Office.

1. Click **Market Views** via **Invest** main menu.





PUBLIC

Reports



Access eStatements

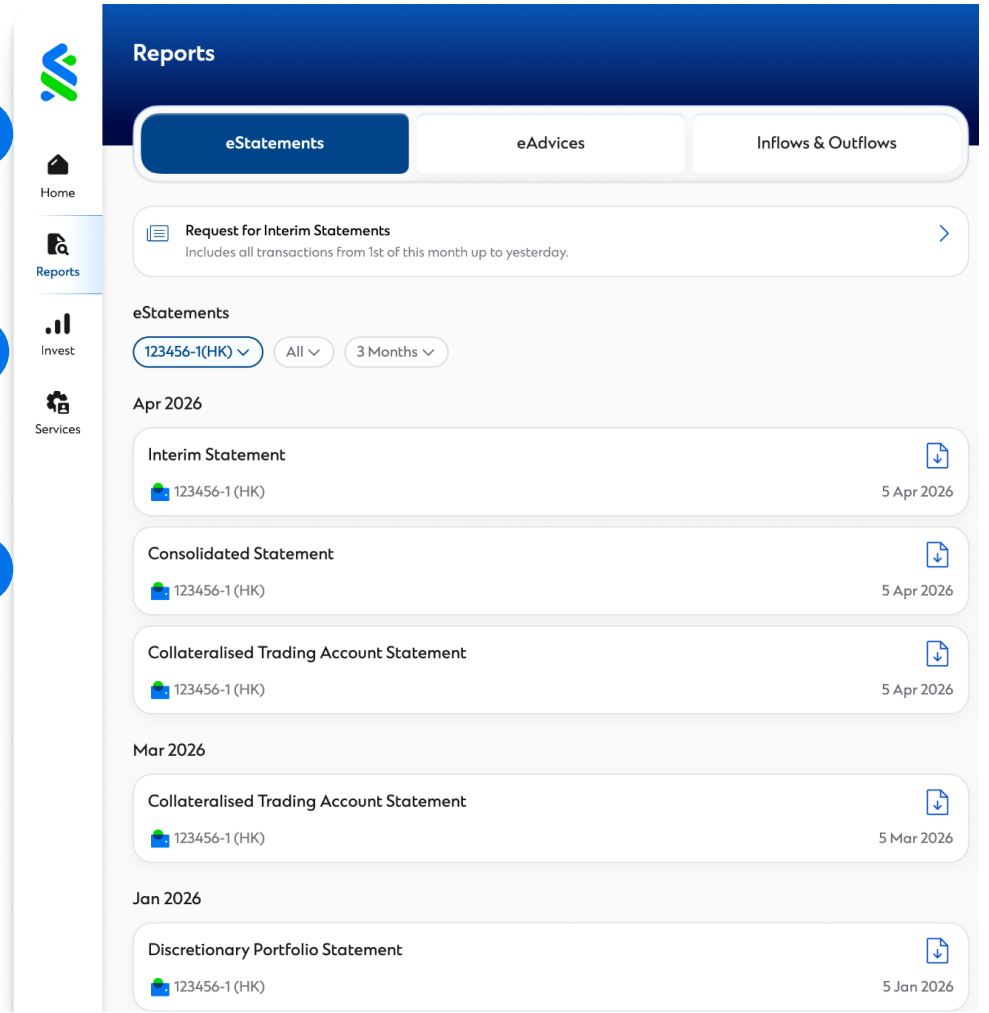
Easily access and review your statements from the past 36 months through the app.

1. Select **eStatements** under **Reports**.

2. Select **Portfolio** and **Type of Statement** and **Date Range**.

   You may select **Consolidated Statement, Collateralised Trading Account Statement, Discretionary Portfolio Statement or Interim Statement**.

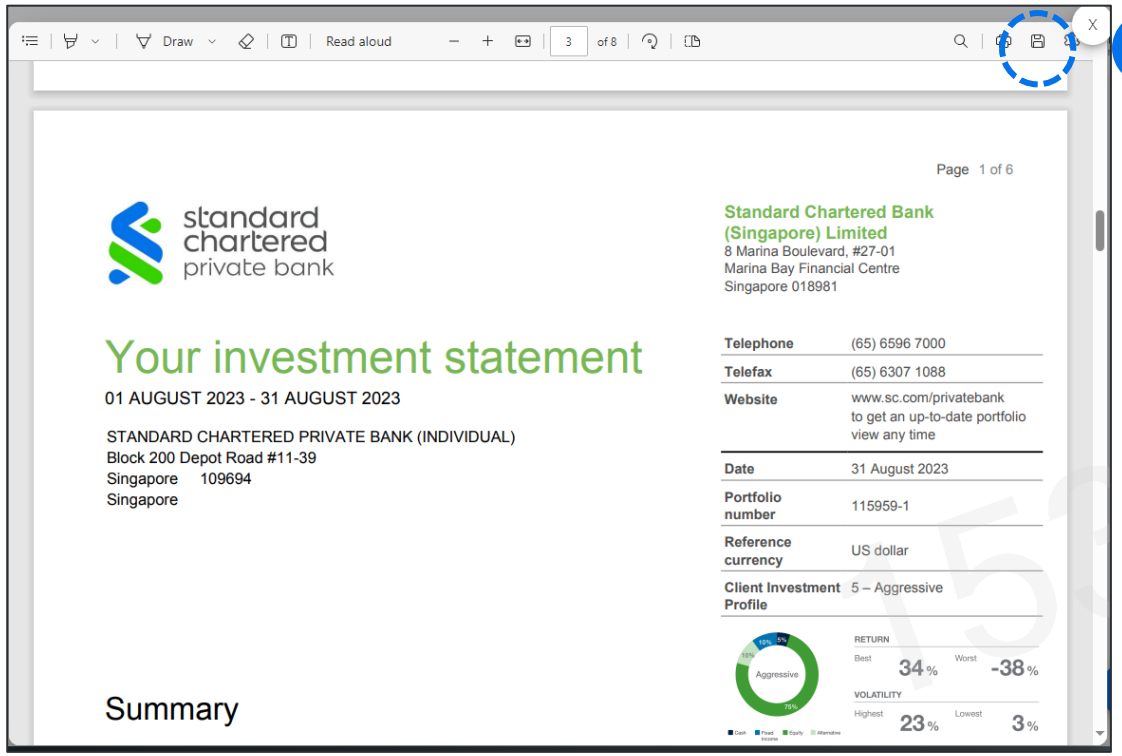
3. Select the statement you wish to view from the eStatements listing.



You will receive an email notification once your latest eStatement is available for viewing.

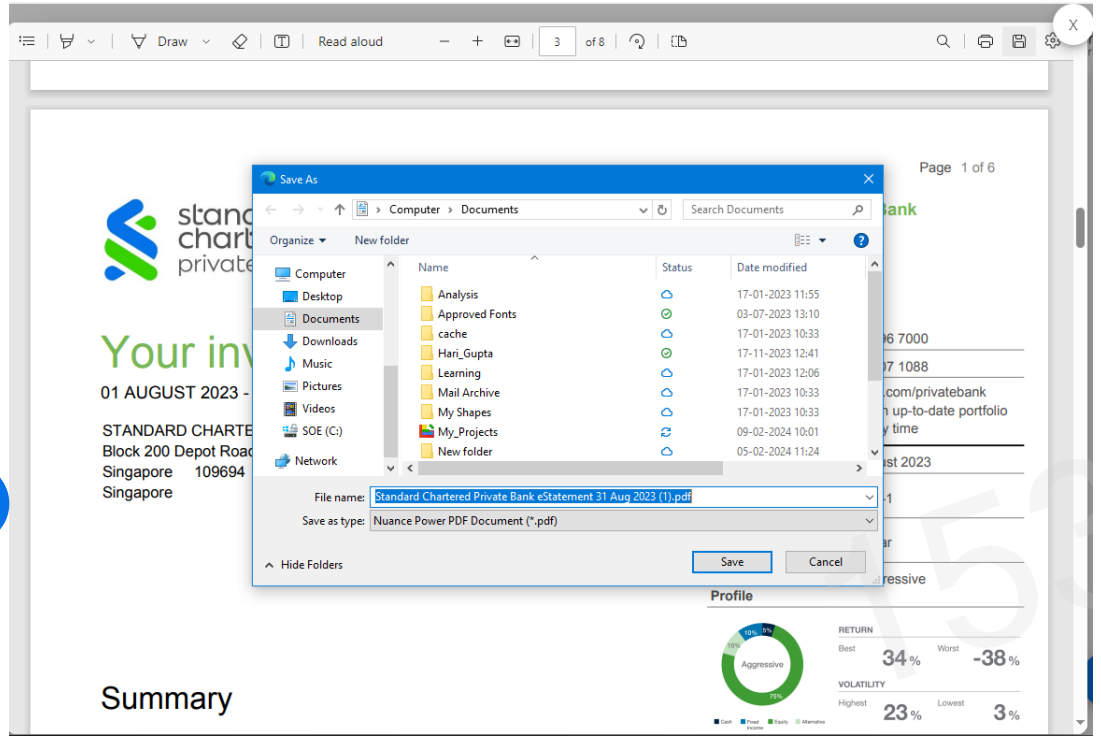
Access eStatements

Download eStatements to your device.



1

1 Click **Save** icon on the top right of the viewer toolbar.



2

2 Select the folder to which you would like to save the eStatement file. The file will be downloaded and saved to the selected folder.

Access eAdvices

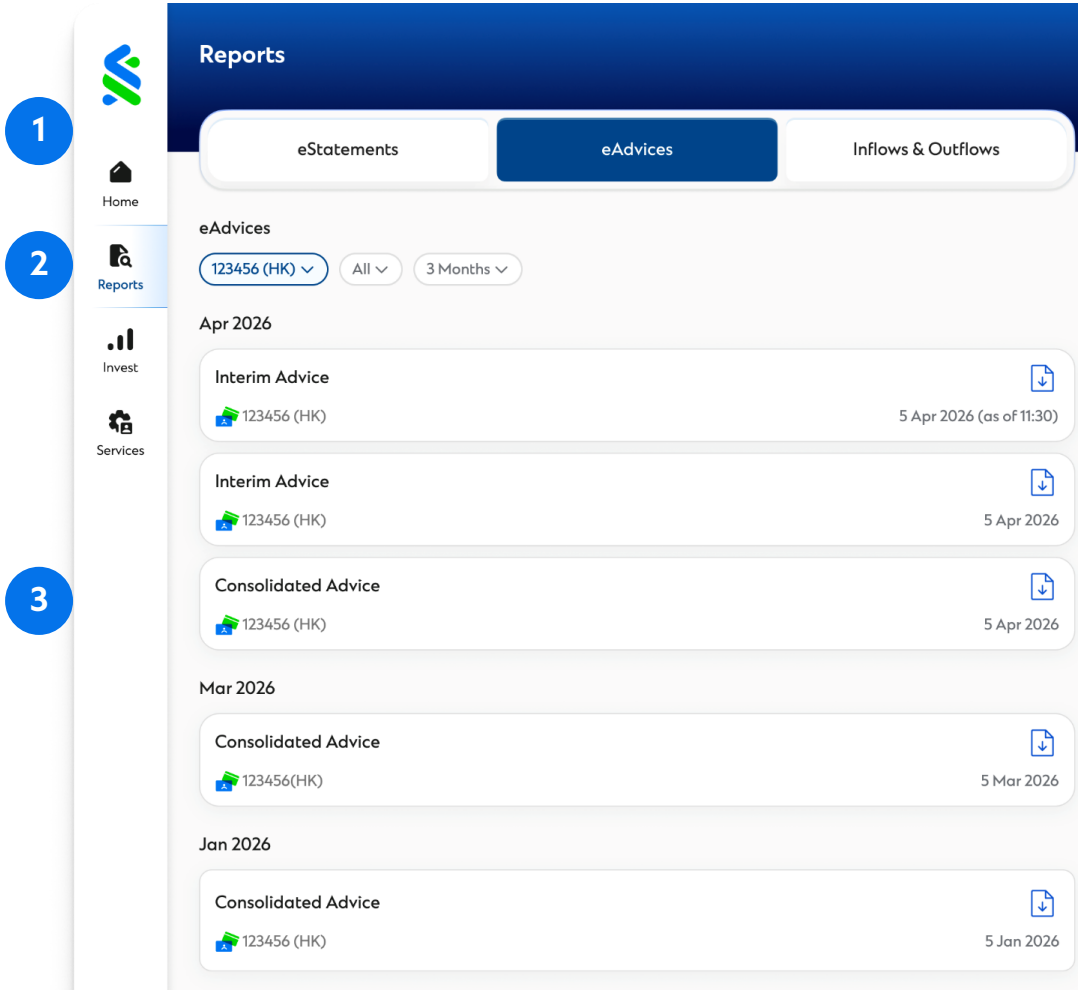
Access your Consolidated Advices for the past 36 months.

1. Select **eAdvices** under **Reports**.

2. Select **Portfolio** , **Type of Advice and Date Range**.

   You may select **Consolidated Advice or Interim Advice**.

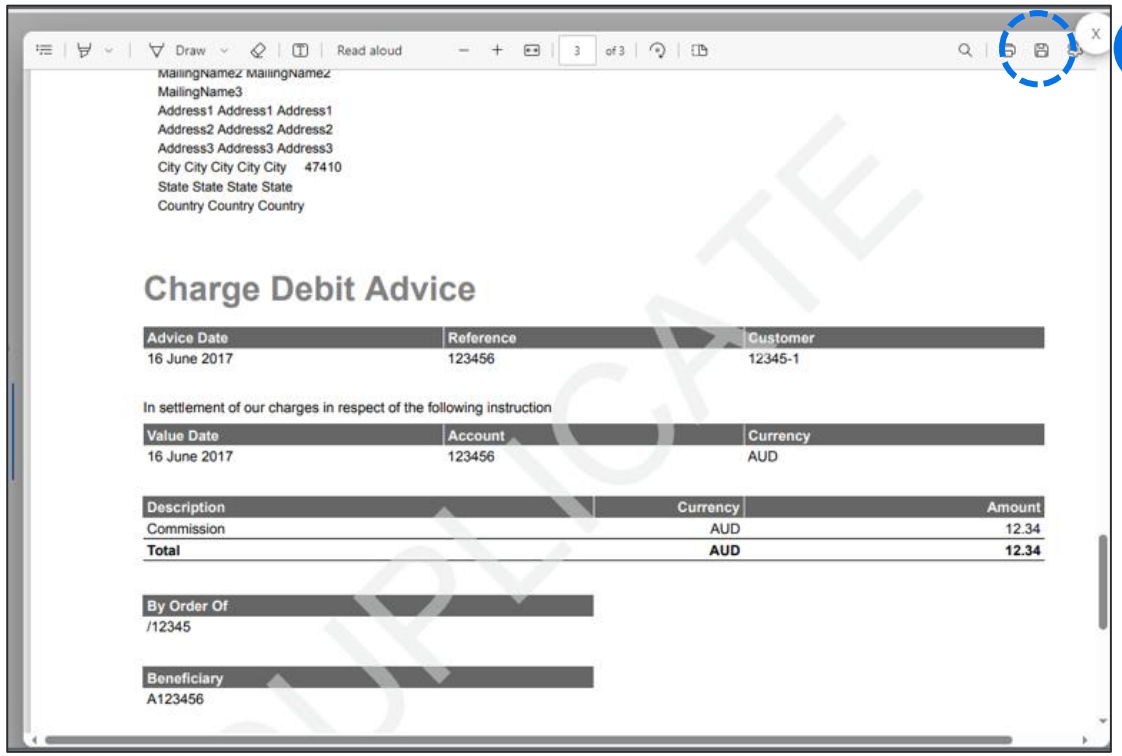
3. Select the advice you wish to view from the eAdvices listing.



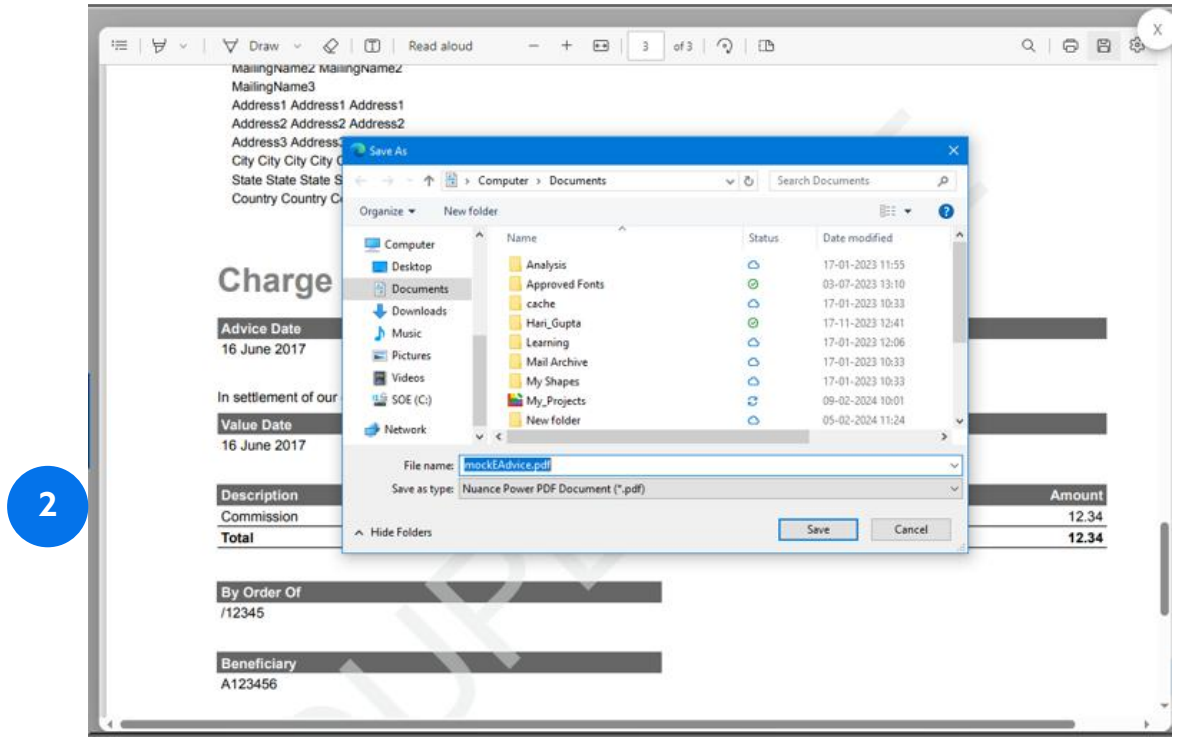
You will receive an email notification once your latest eAdvice is available for viewing.

Access eAdvices

Download eAdvices to your device.



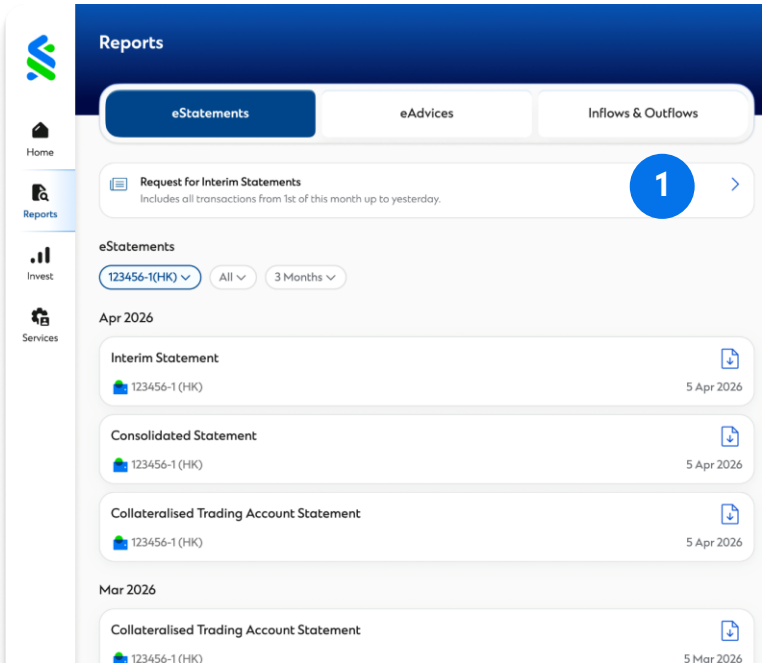
1 Click **Save** icon on the top right of the viewer toolbar.

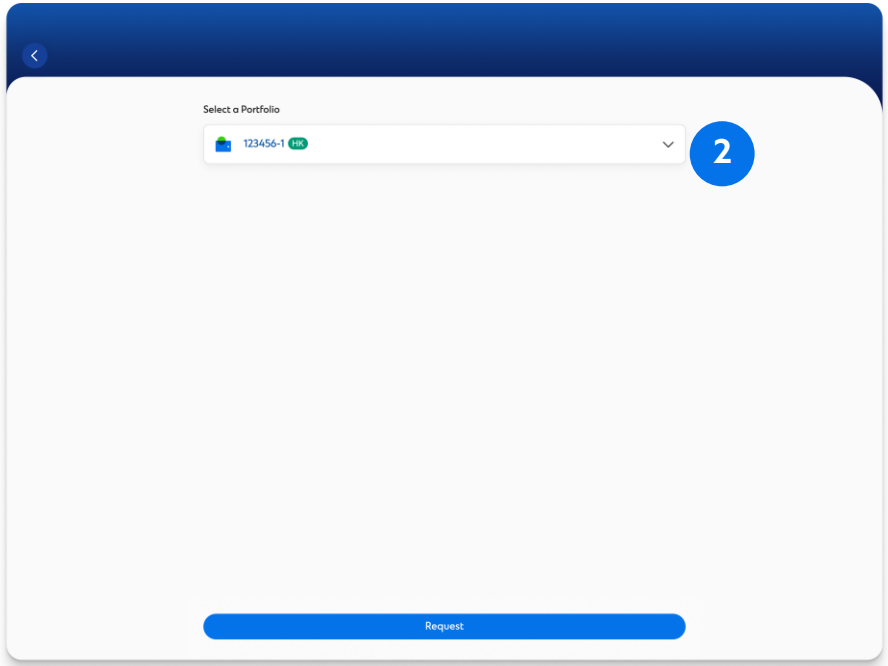


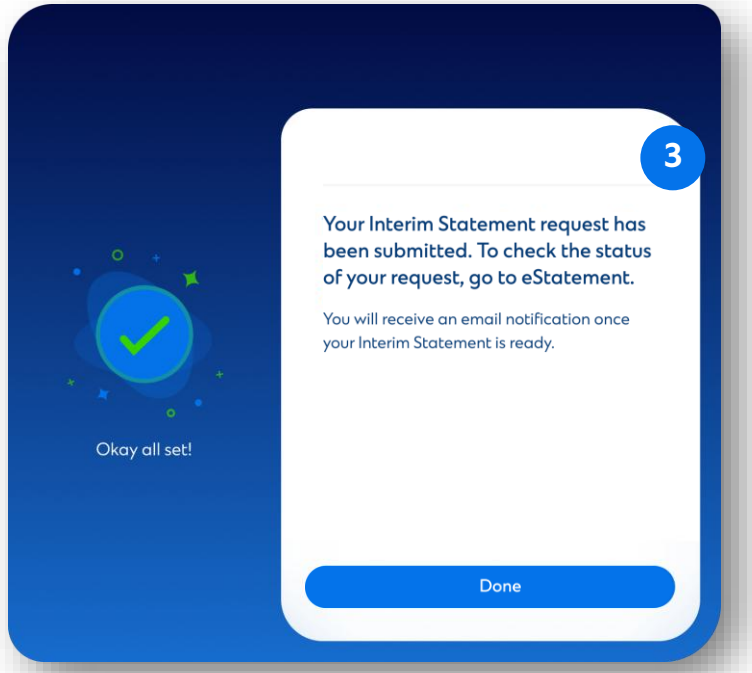
2 Select the folder to which you would like to save the eAdvice file. The file will be downloaded and saved to the selected folder.

Request Interim Statements

Interim (Same Day) Statement Generation - Interim Statement covers the period from the first day of the current month to the previous business day before your request.







1. This feature can be found within the menu **eStatements** under **Reports**.

2. Select CIF and portfolio that you wish to request interim statements for and click **Request**.

3. Your request will be submitted. You will receive an email notification when it is available for download within the next 15 minutes.

You will receive an email notification once your latest interim Statement is available for viewing.

Access Inflows & Outflows

Inflows and Outflows.

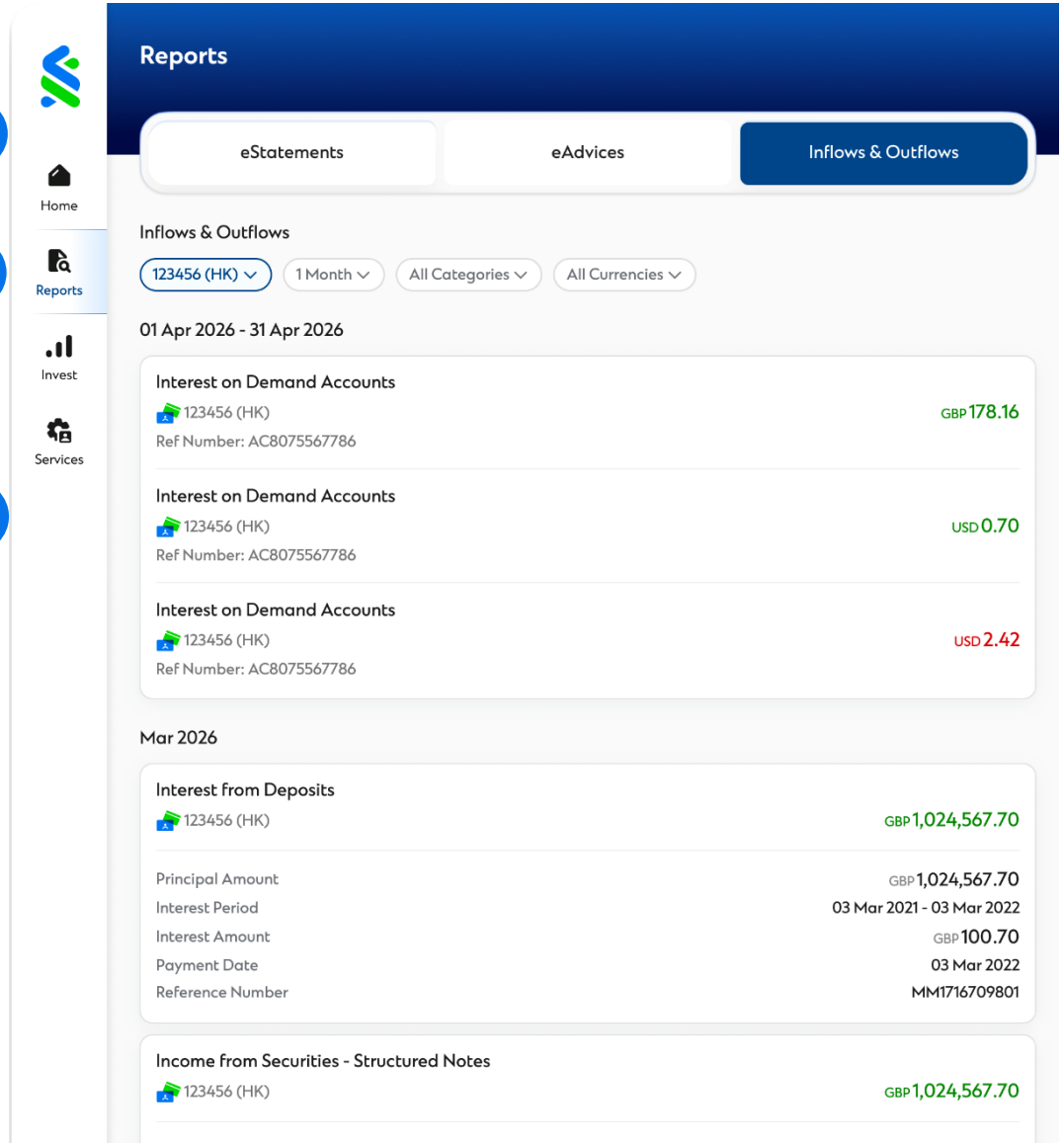
View your inflows and outflows across SG and HK portfolios.

1. Select **Inflows & Outflows** under **Reports.**

2. Select **Portfolio**, **Date Range, Category and Currency.**

   You may select **Interest on Demand Accounts, Interest from Deposits, Income from Securities – Structured Notes / For Dividend Distribution / For Coupon Distribution / For Signature Coupon Distribution, Reinvested Income or Interest Paid on Loans.**

3. Inflows & Outflows are displayed based on date range.



Inflows and outflows details provided are as of last month-end.

PUBLIC

Collaboration

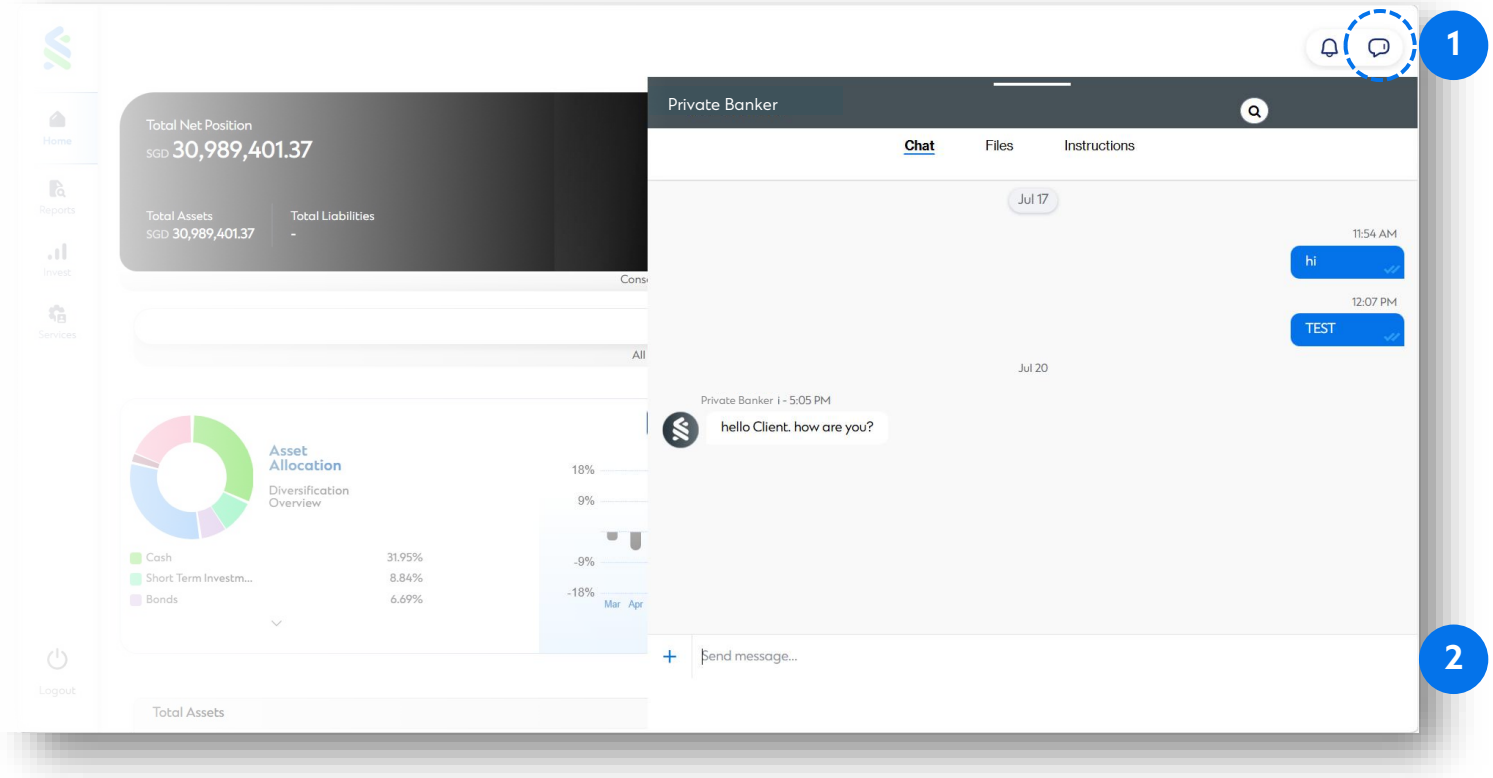


Instant Messaging

The myRM feature allows you to reach out to your Private Banker directly through SC Global Private Bank app in a secure and intuitive manner.

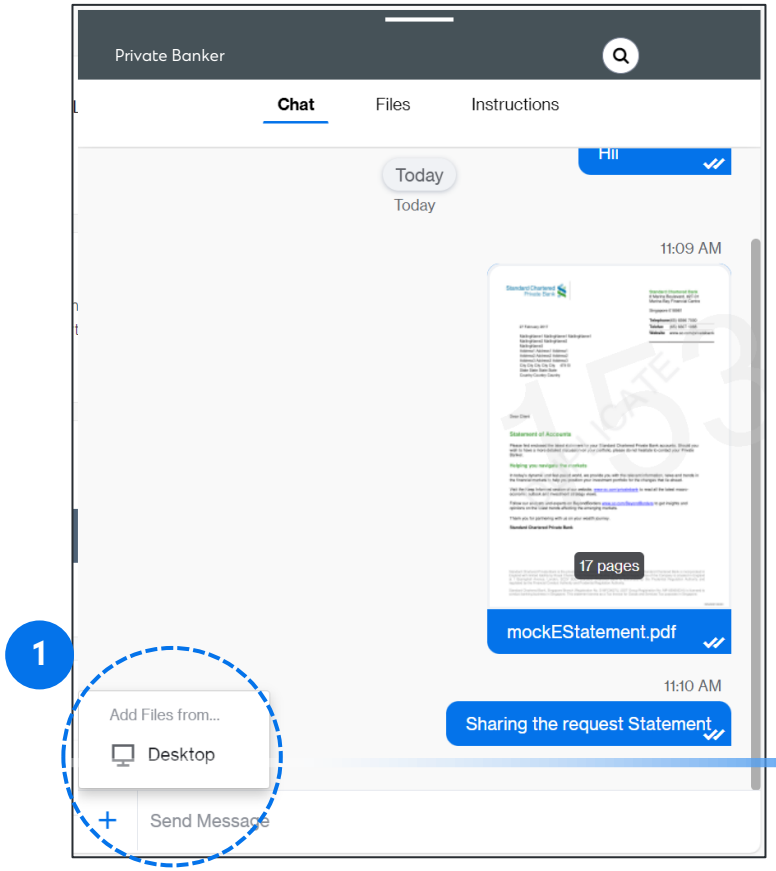
1. Click the **Chat** icon at any point within the SC Global Private Bank app.

2. Send messages, discuss trade ideas and share documents with your Private Banker.

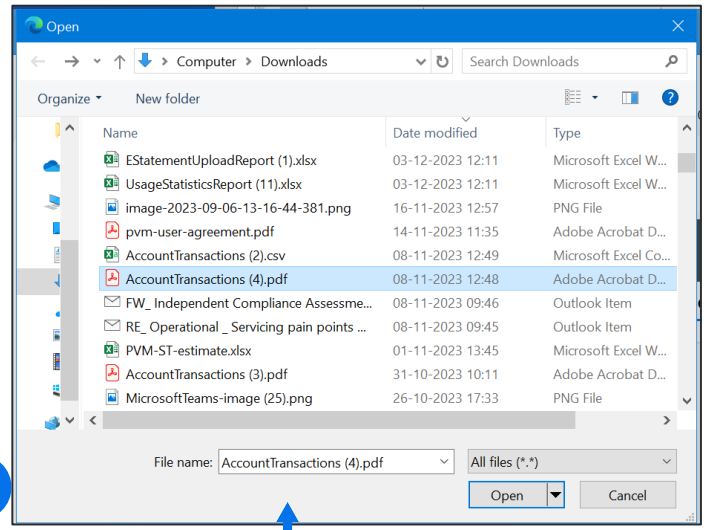


Document Sharing

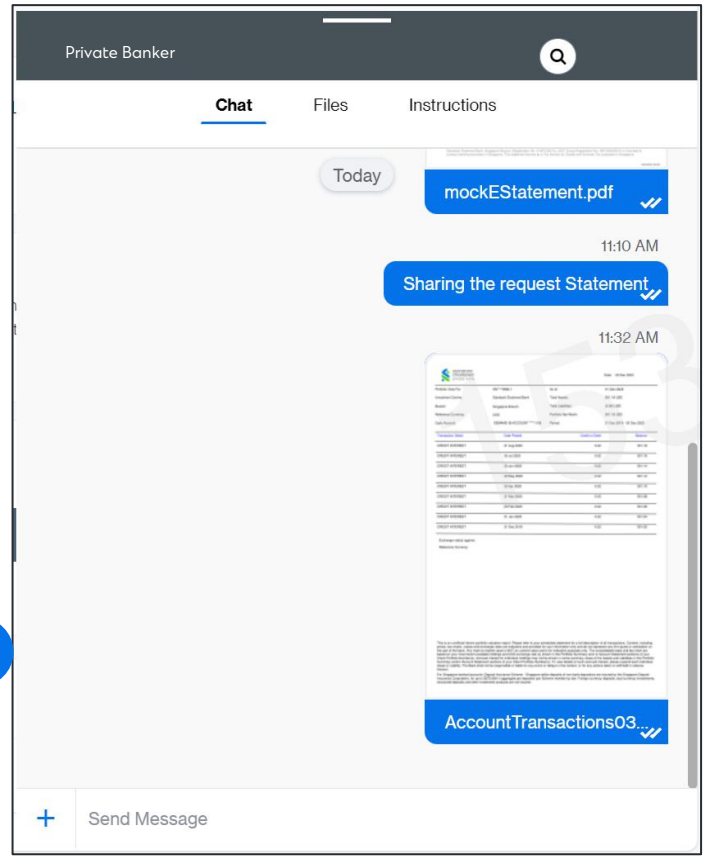
You can share and receive file from your Private Banker directly through SC Global Private Bank app.



1



2



3

1 Click the **Chat** icon and then click the **+** icon to upload a document from your device.

2 Select the desired document file (ppt, doc, pdf, jpeg or png) and click **Open**.

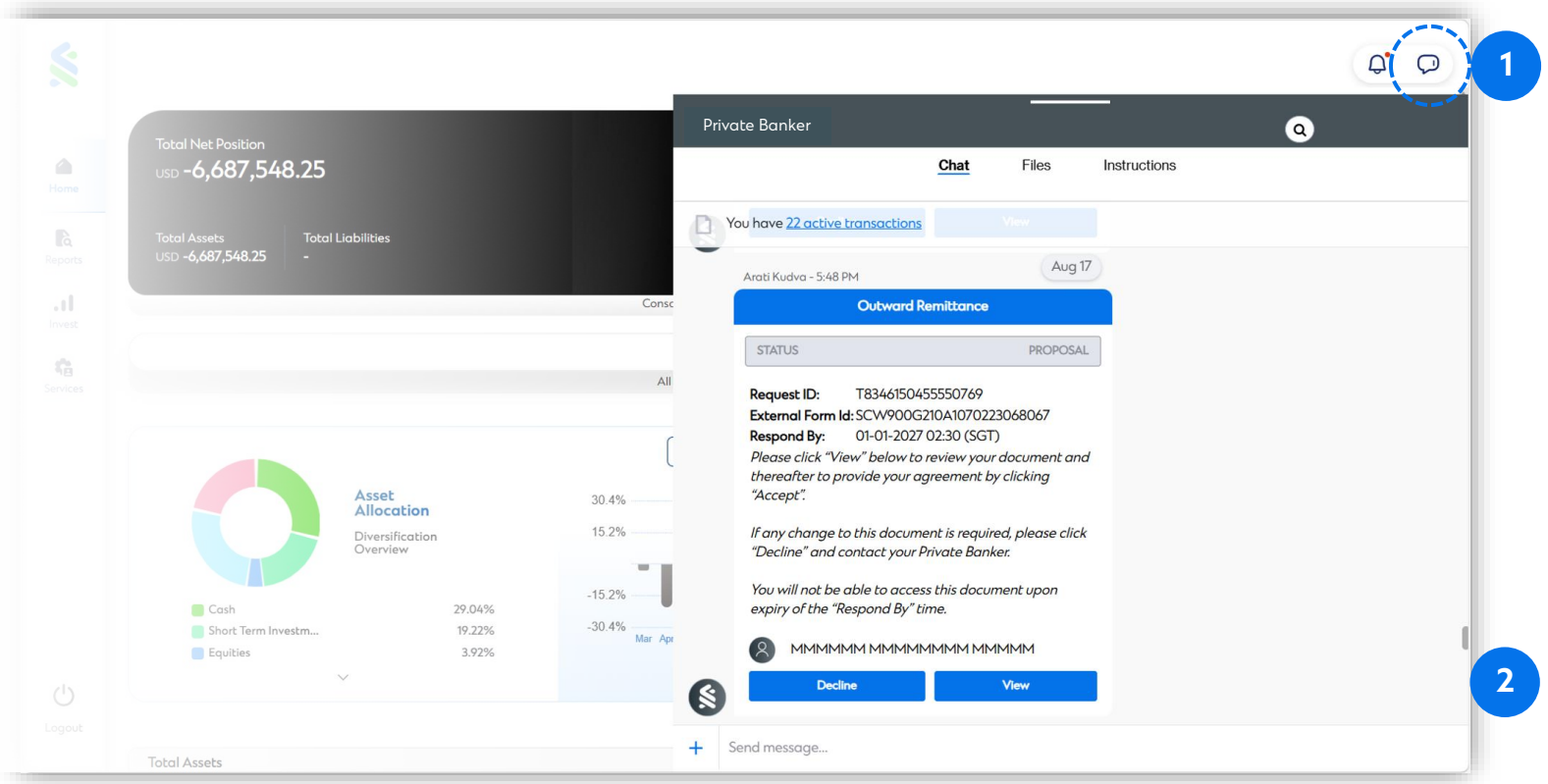
3 File will be securely shared with your Private Banker.

Payment Instructions - Review

Upon payment instructions being provided to your Private Banker.

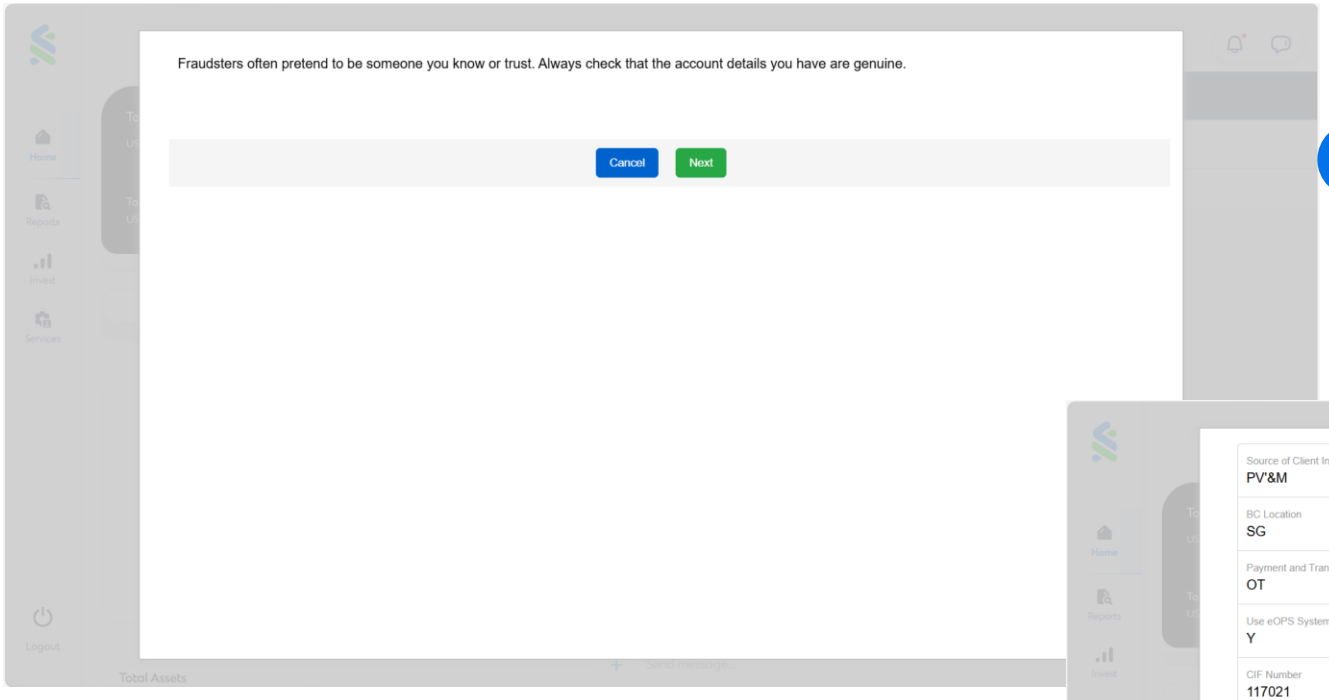
1. Click the **Chat** icon to access payment instructions.

2. Click **View** for payment instruction details.

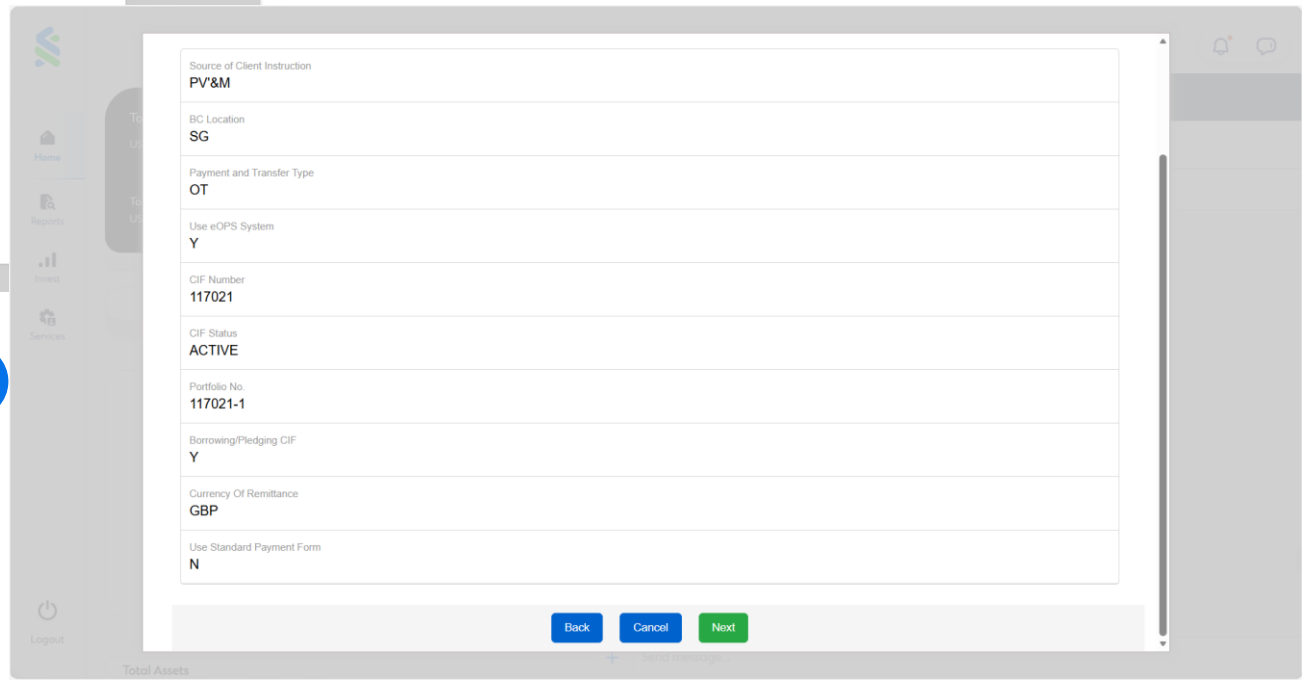


* Excluding UK Advisory Center clients.

Payment Instructions - Review (continued)



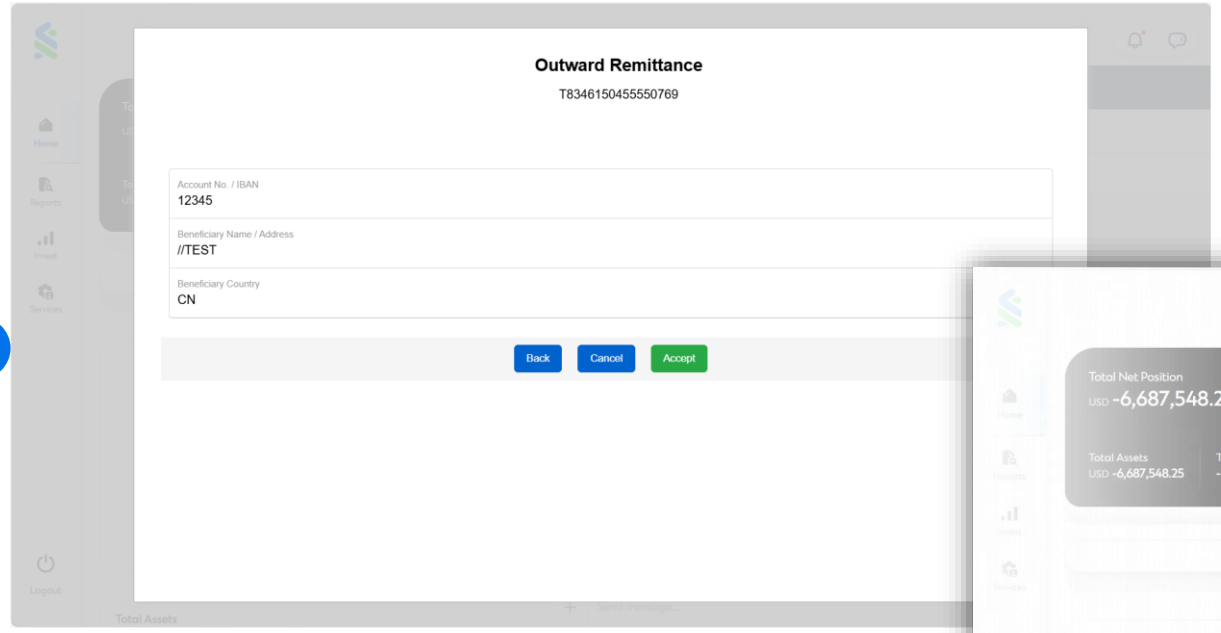
3 Click **Next** to acknowledge the Fraud notification pop up prompt.



4 Review the details of the payment instruction.

Payment Instructions - Approval

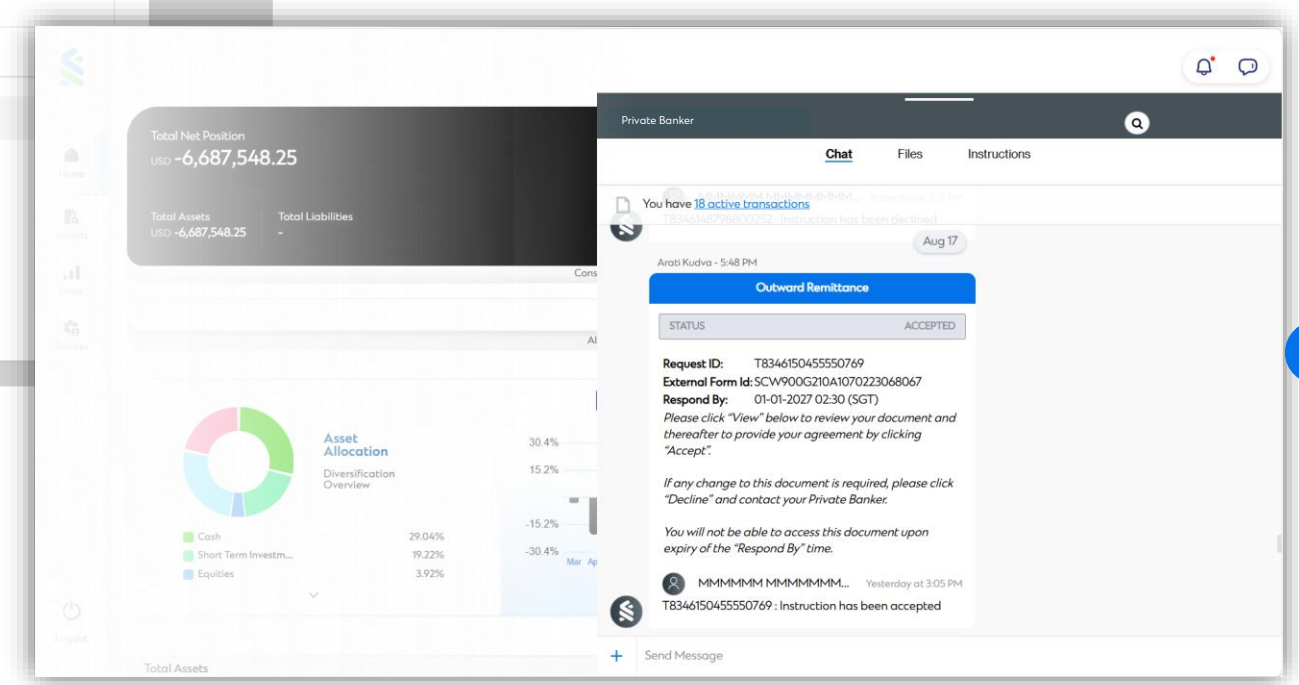
Once you have reviewed the payment instruction details you can provide your approval for the payment to be processed.



5

5 Click **Accept** to proceed with the Payment transaction post review.

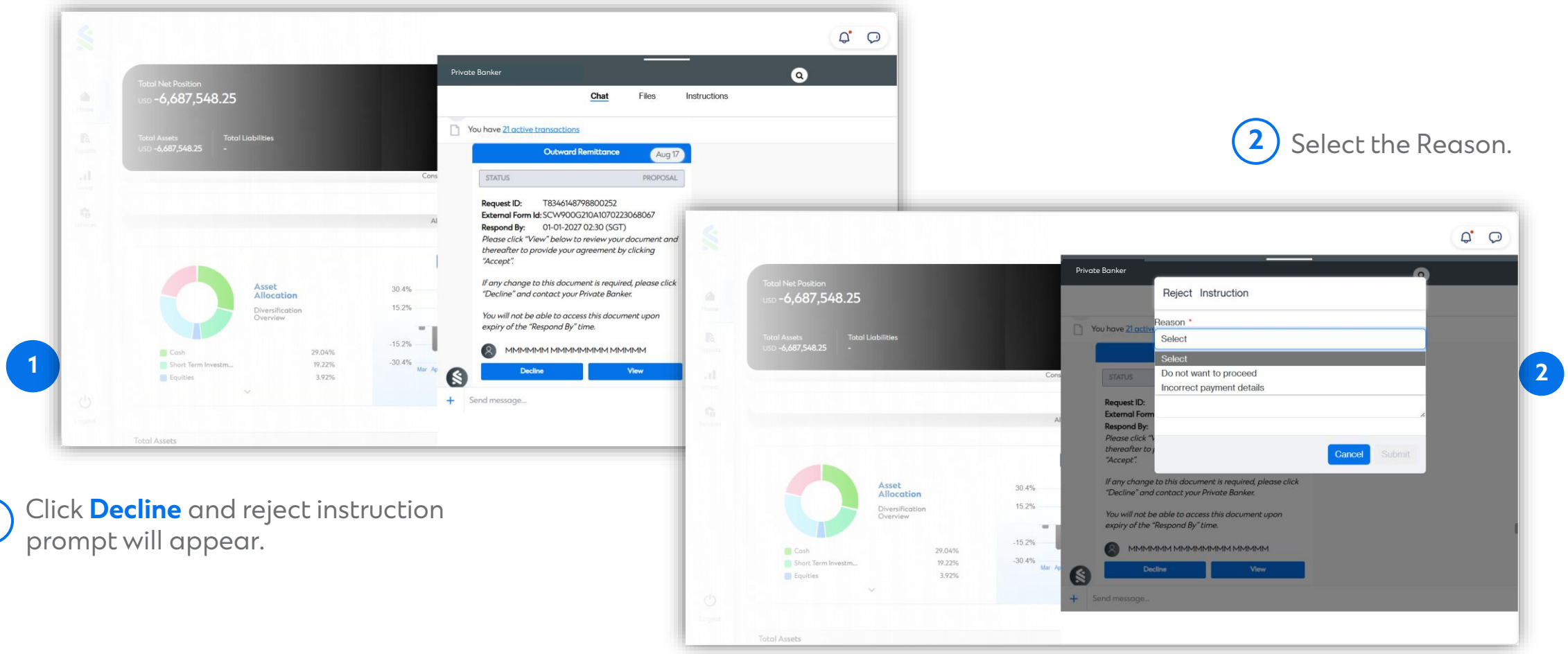
6 Payment instruction status will be updated to **ACCEPTED** in the chat after OTP authentication.



6

Payment Instructions - Decline

Once you have reviewed all the Payment instruction details, you can decline the Payment instruction if you do not wish to proceed.

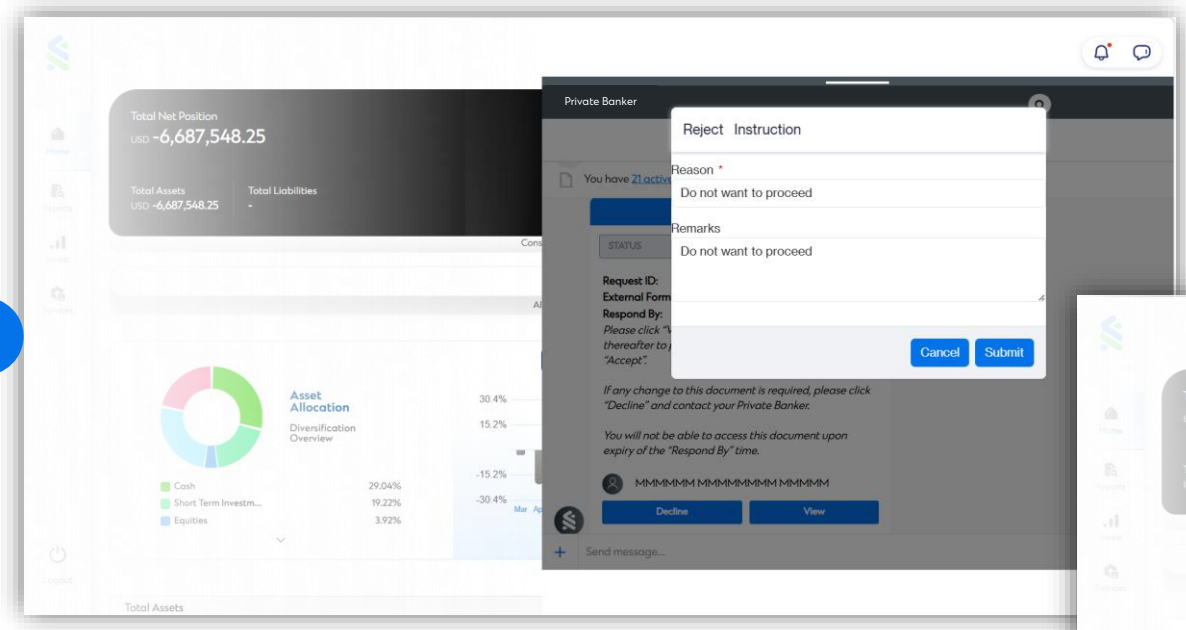


2 Select the Reason.

1 Click **Decline** and reject instruction prompt will appear.

Payment Instructions - Decline

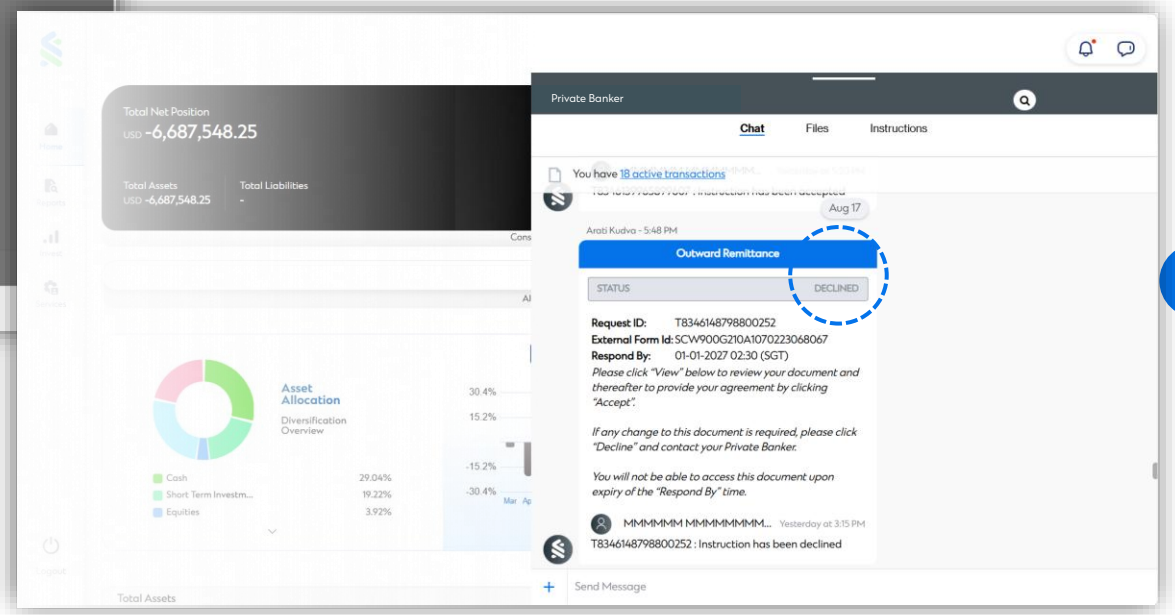
Once you have reviewed all the Payment instruction details, you can decline the Payment instruction if you do not wish to proceed.



3

3 Enter the Remarks and click **Submit**.

4 Payment instruction status will be updated to **DECLINED** in the chat.



4

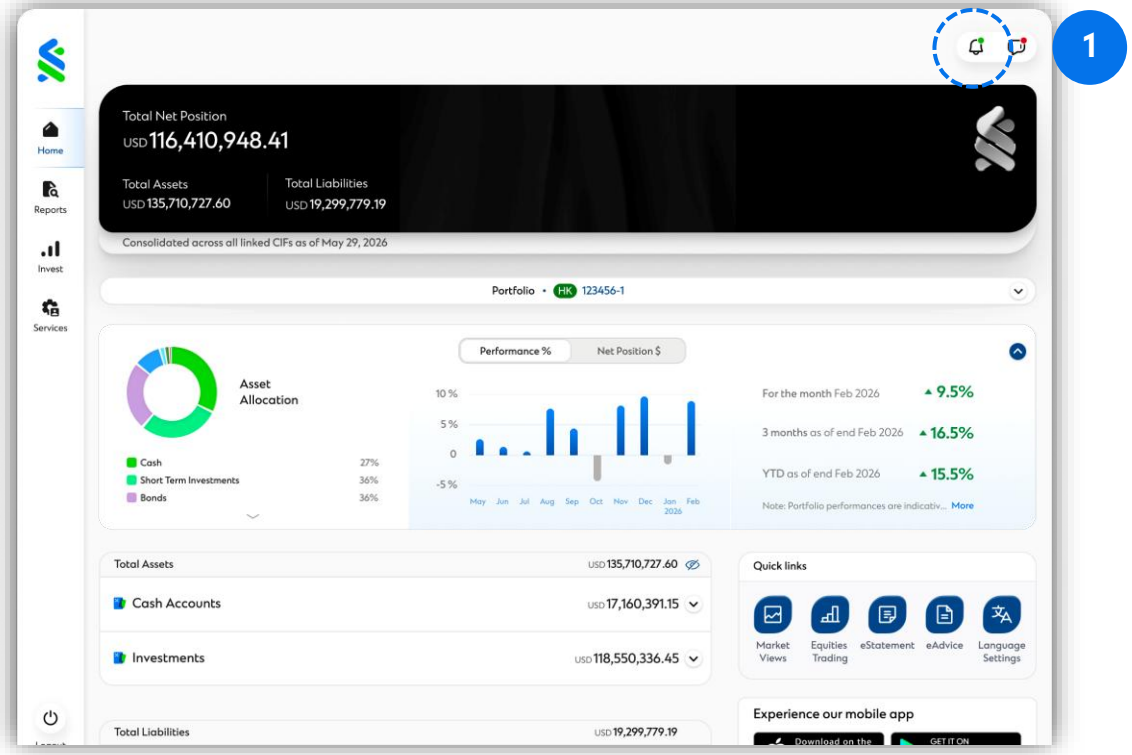
PUBLIC

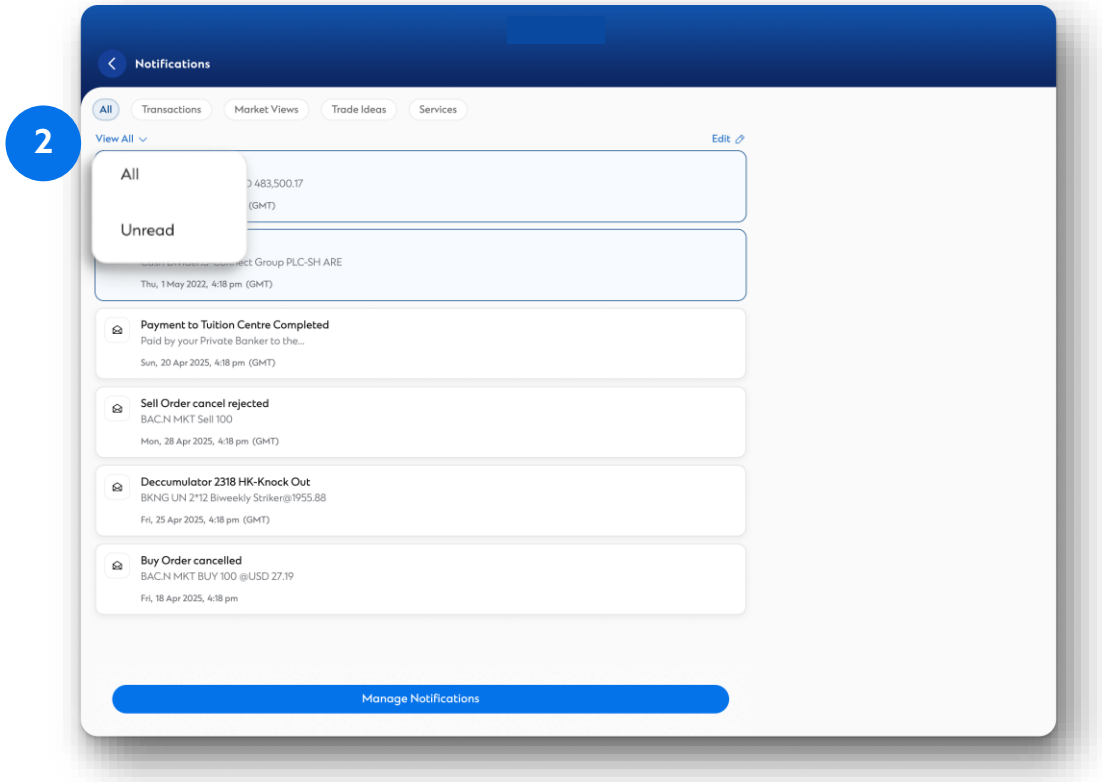
Notifications



Communication Hub – Stay informed with key notifications.

The SC Global Private Bank app provides a simple and intuitive user interface for you to access all the notifications in a single place.





1 Click the **bell** icon on the top right of the home screen to access the Communication Hub.

2 By default, all notifications are displayed. To view details, select the notification from the listing. To filter and view unread notifications, Click **View All**.

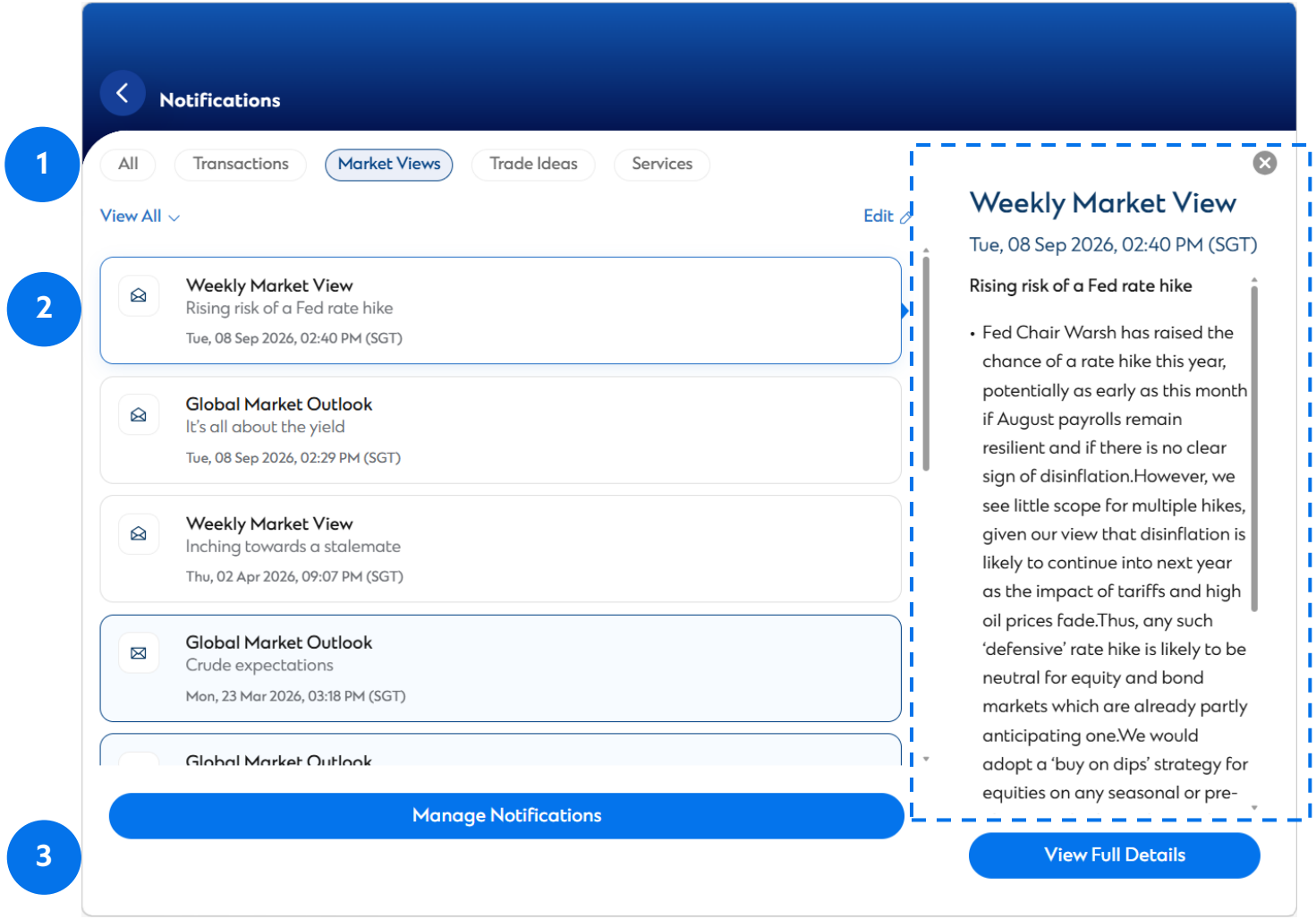
Communication Hub – Market Views

To view market insights.

1. Notifications are grouped by categories. For example, click the **Market Views** tab to view notifications related to market insights.

2. Click a notification to read its summary. Details will appear on the right side.

3. For a detailed view, click **View Full Details.**

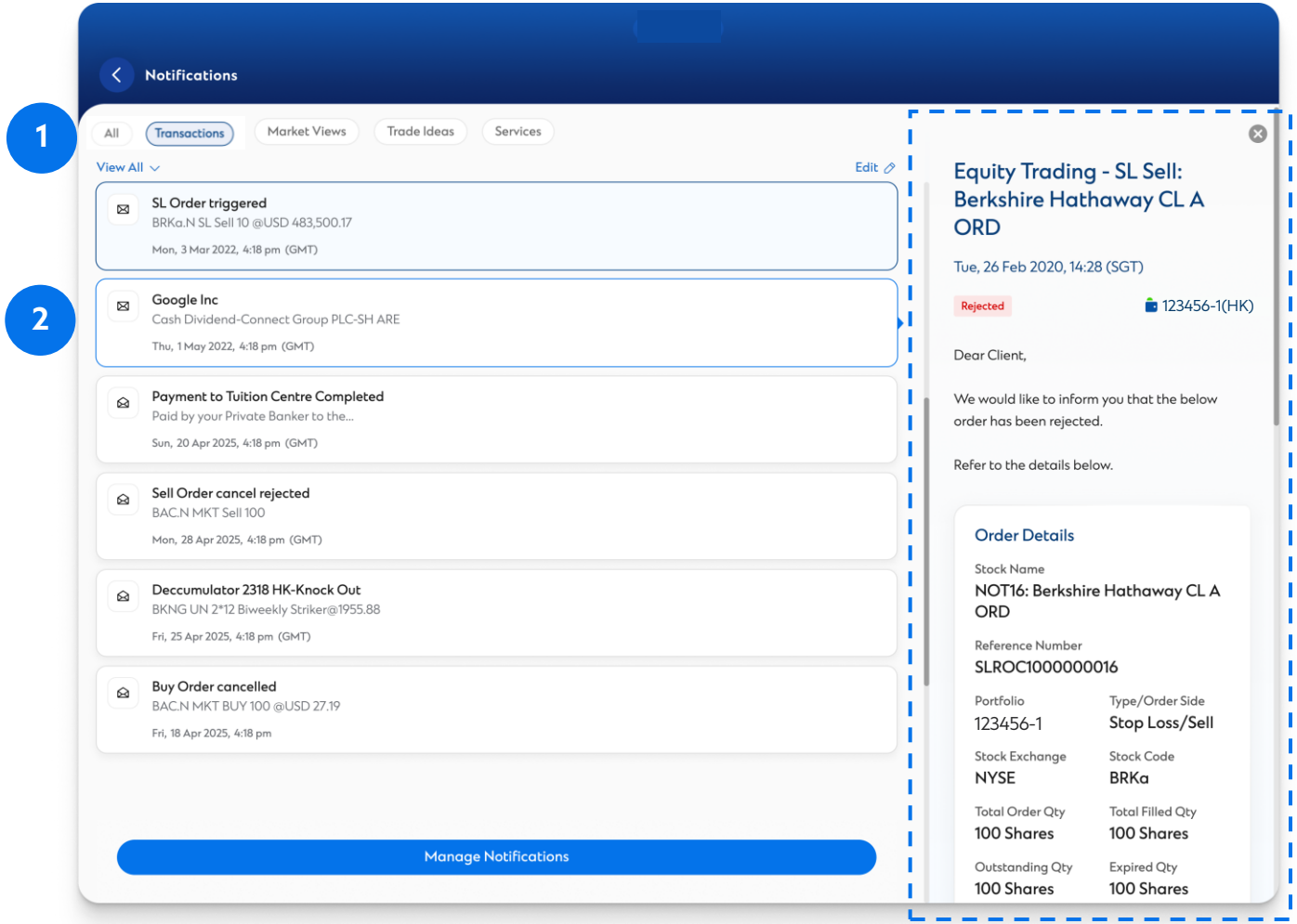


Communication Hub – Transaction notifications

To view Equity Linked Structured Products and Equity trading transaction notifications.

1. Click the **Transactions** option. All the notifications related to Equity Trading and Equity Linked Structured Products will be listed here.

2. To read the summary, click individual notification and details will appear on the right side.



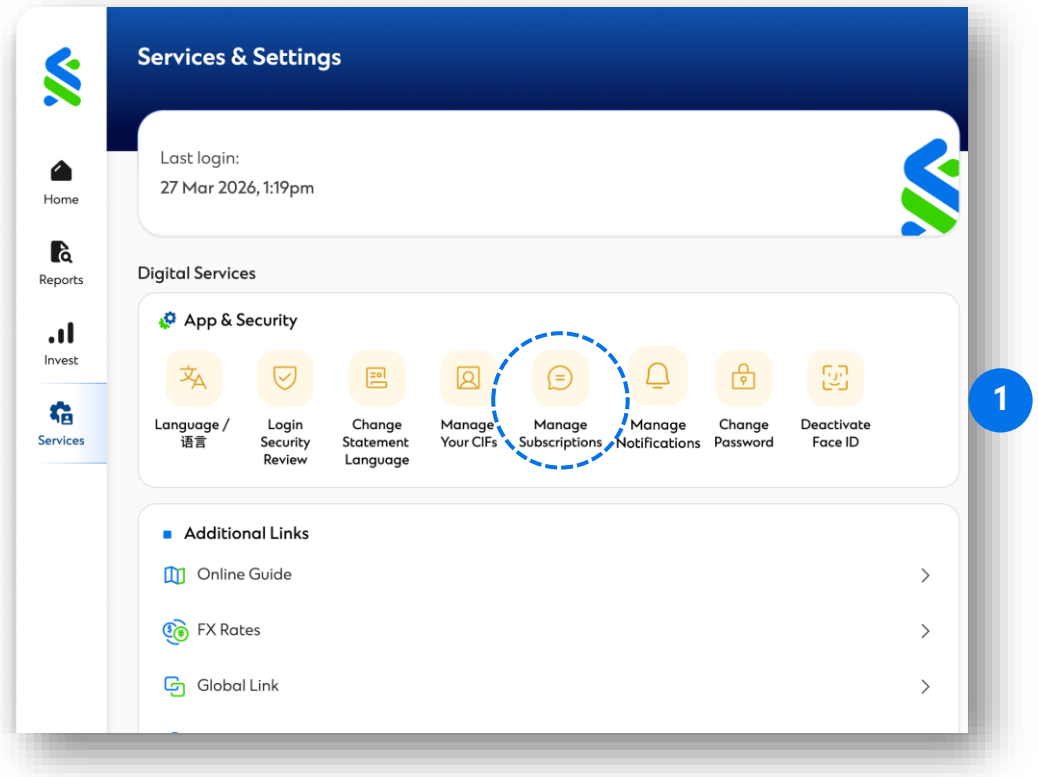
1. Equity Linked Structured Products: Knock Out and Maturity alerts.
2. Equity Trading: All order alerts.

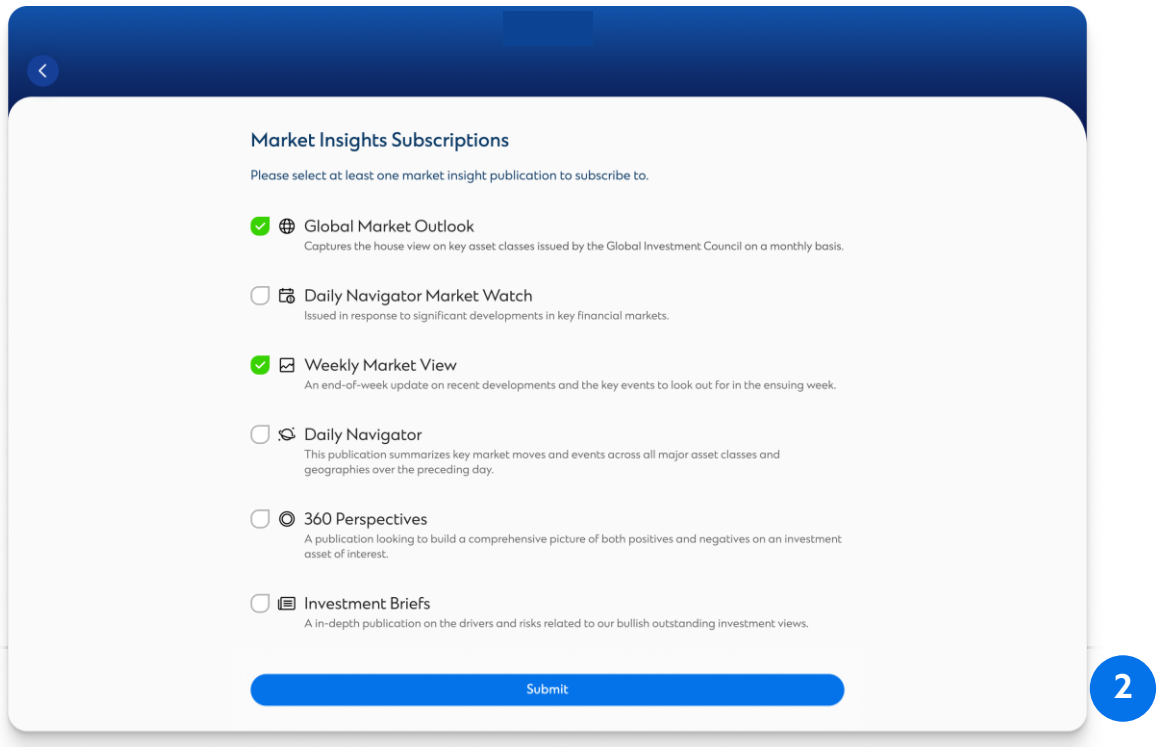
PUBLIC

Manage Your Preferences

Subscriptions

Our Market Insights provides you updates on the market and house views by asset classes.



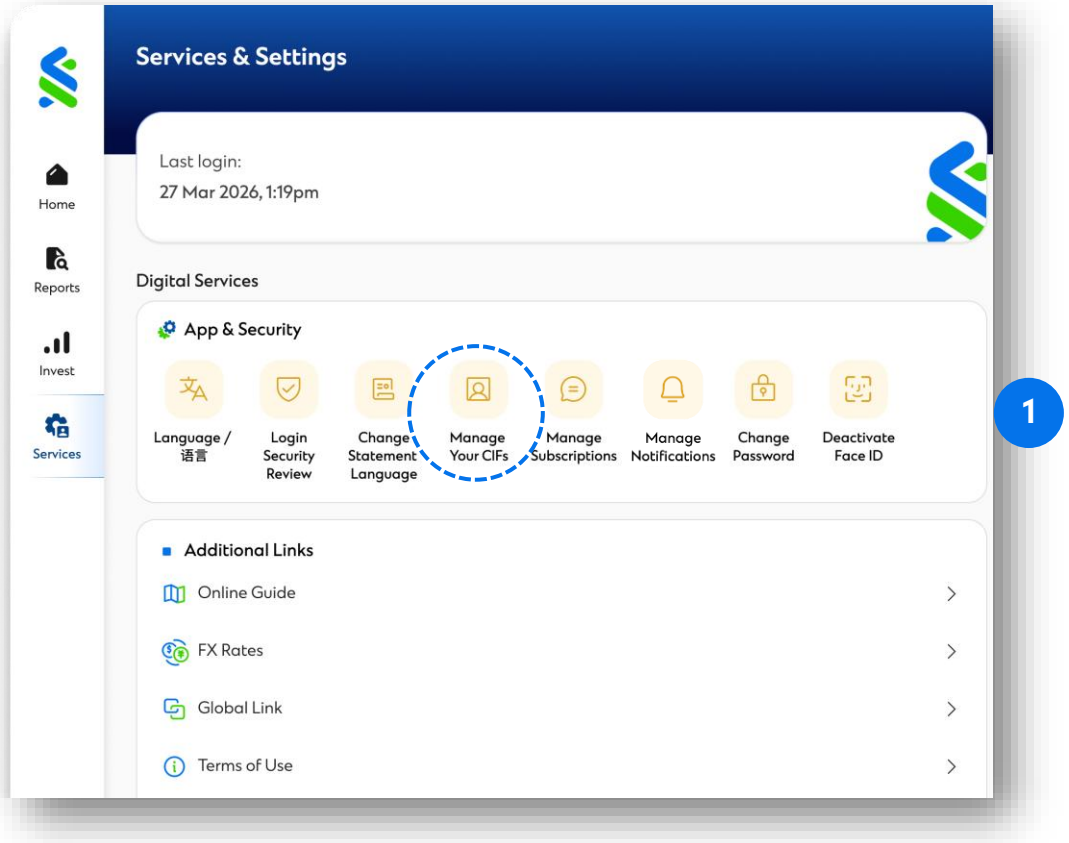


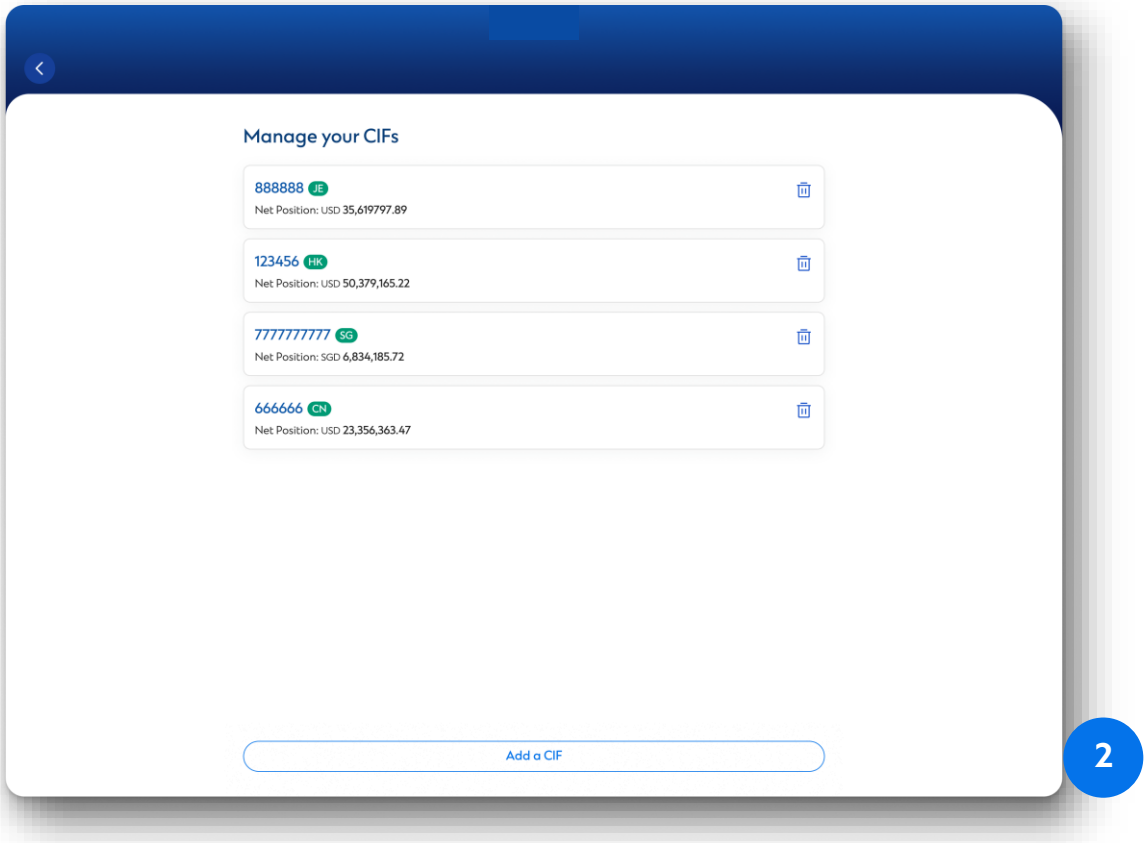
1 Click **Manage Subscriptions** via the **Services** main menu to customize alerts for 'Market Views'.

2 Select the preferred publications and click **Submit** button at the bottom of the screen to subscribe.

Manage CIF – Add a CIF

This feature allows you to add a CIF to your login profile in the SC Global Private Bank application.

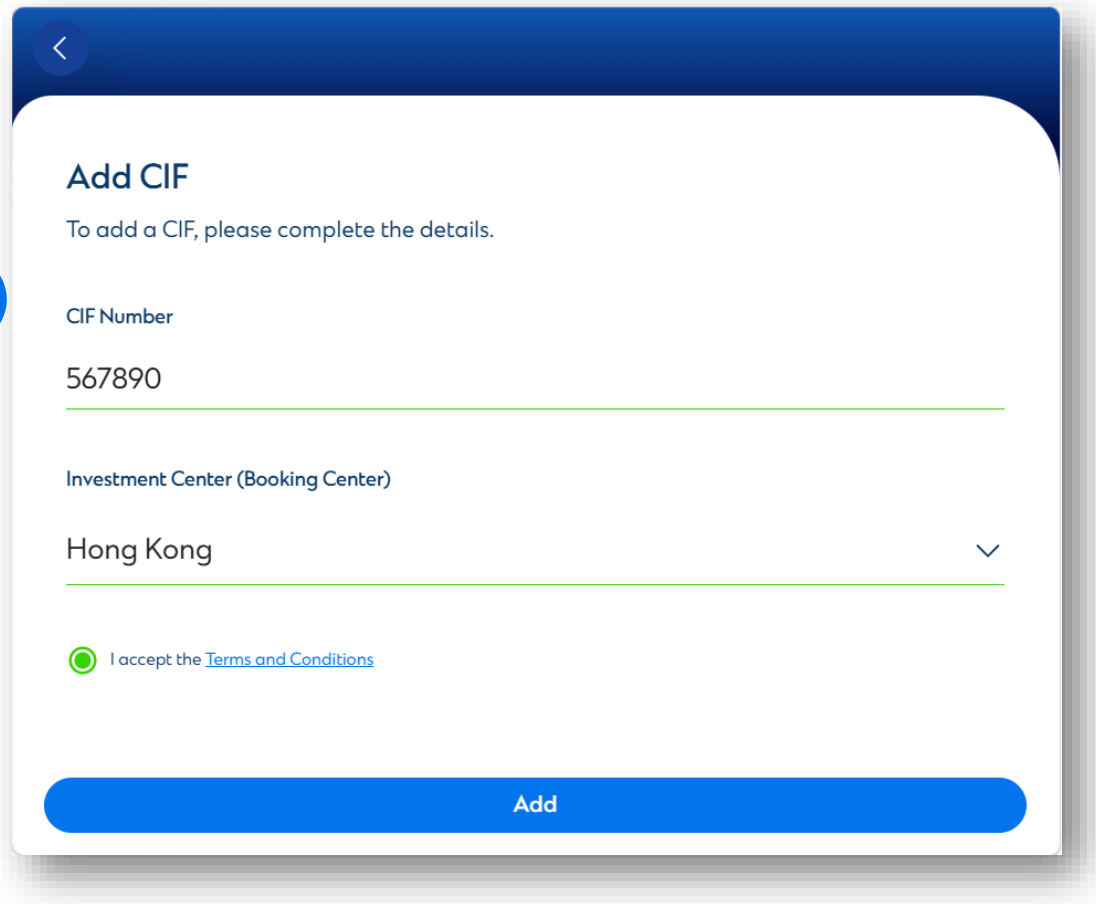


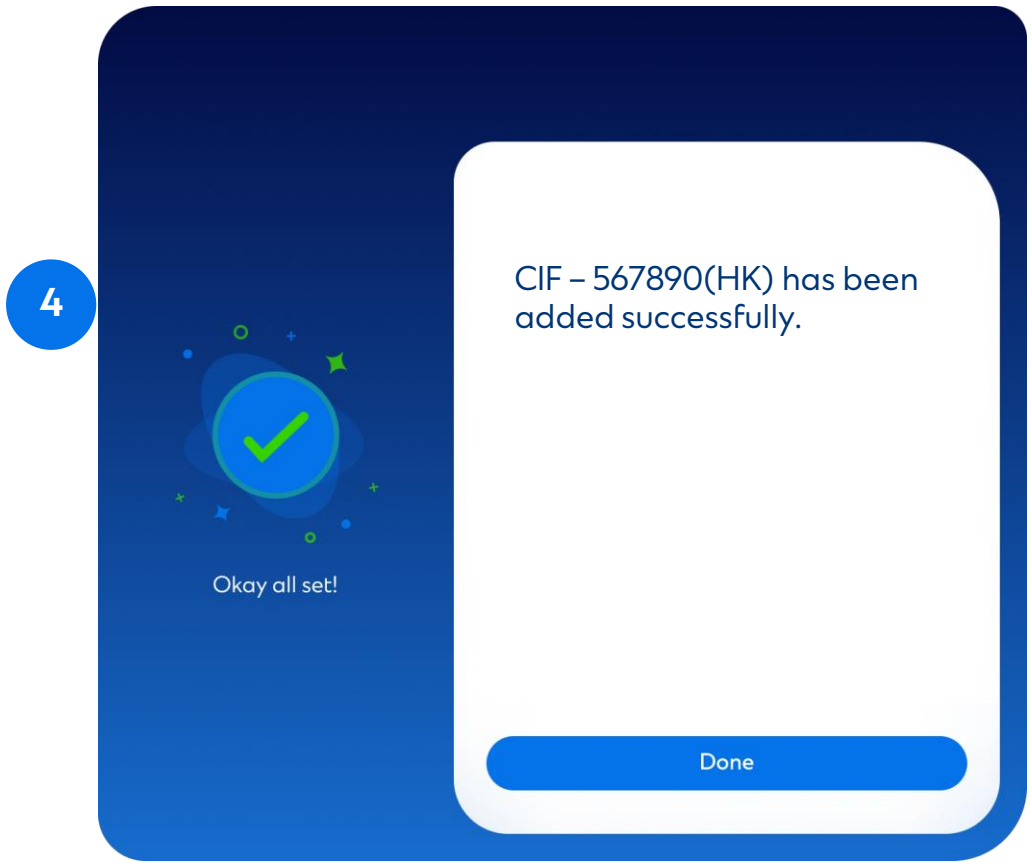


1 Click **Manage Your CIFs** via the **Services** main menu.

2 Click **Add CIF.** A prompt will appear.

Manage CIF – Add a CIF (continued)



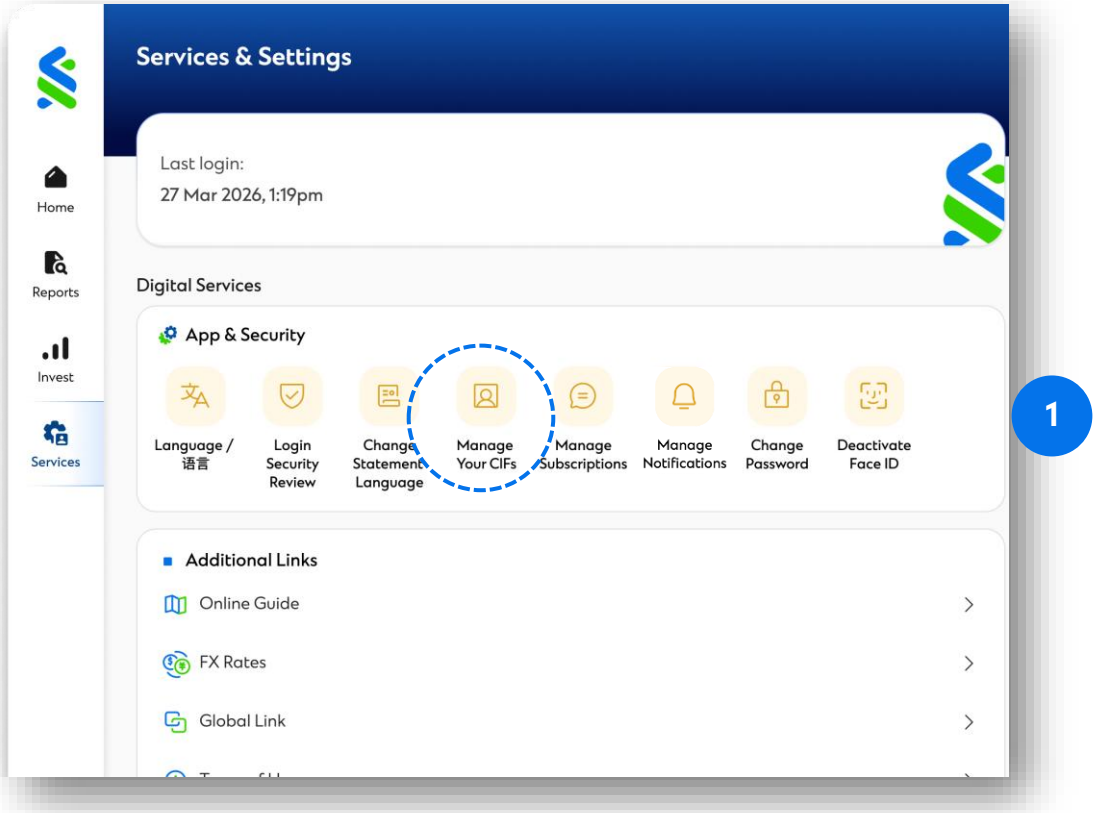


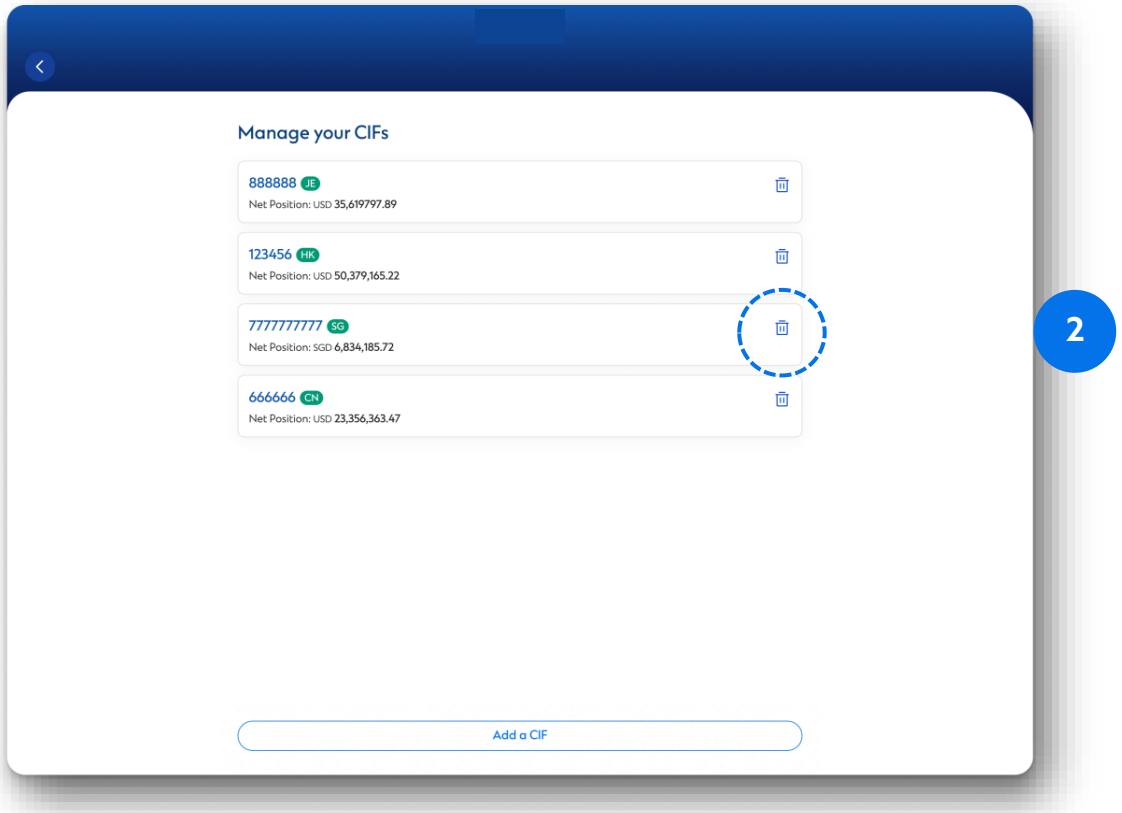
3 Enter the CIF details. Accept the Terms and Conditions and then click **Add**.

4 The relevant CIF is added to your login profile.

Manage CIF – Remove a CIF

This feature allows you to remove a CIF from your login profile in the SC Global Private Bank application.



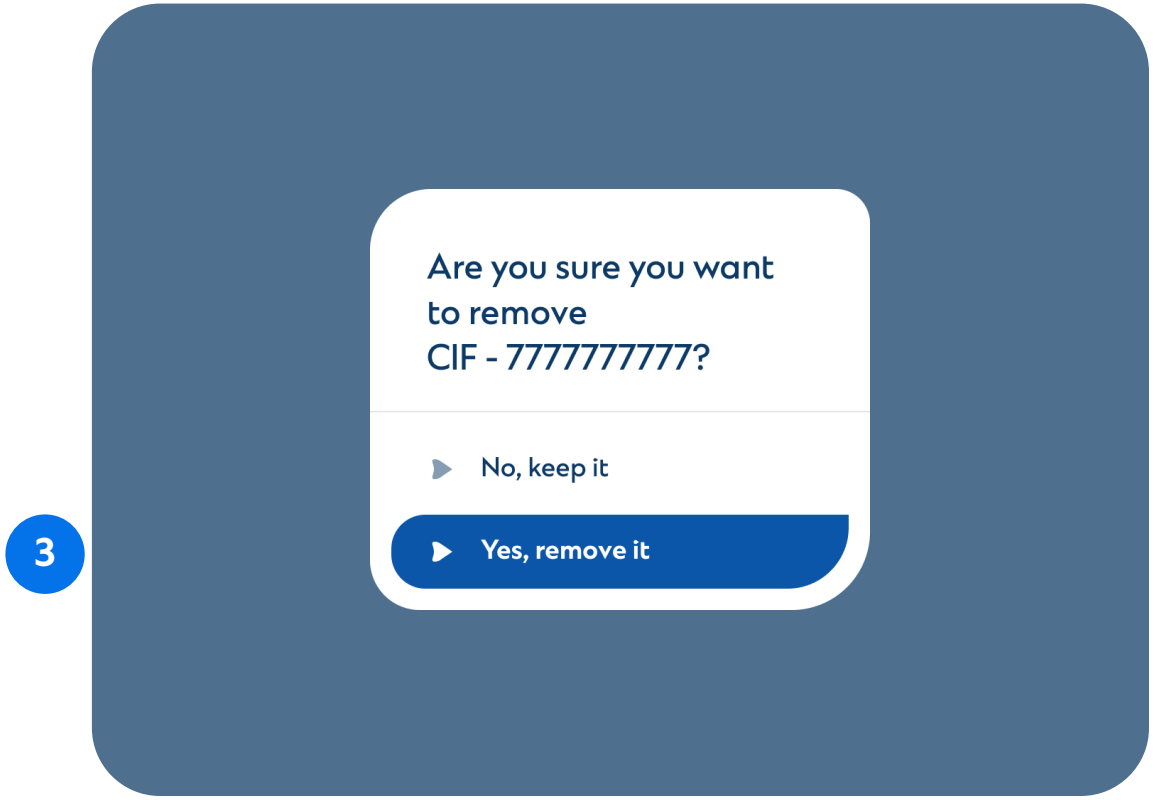


1 Click **Manage Your CIFs** via the **Services** main menu.

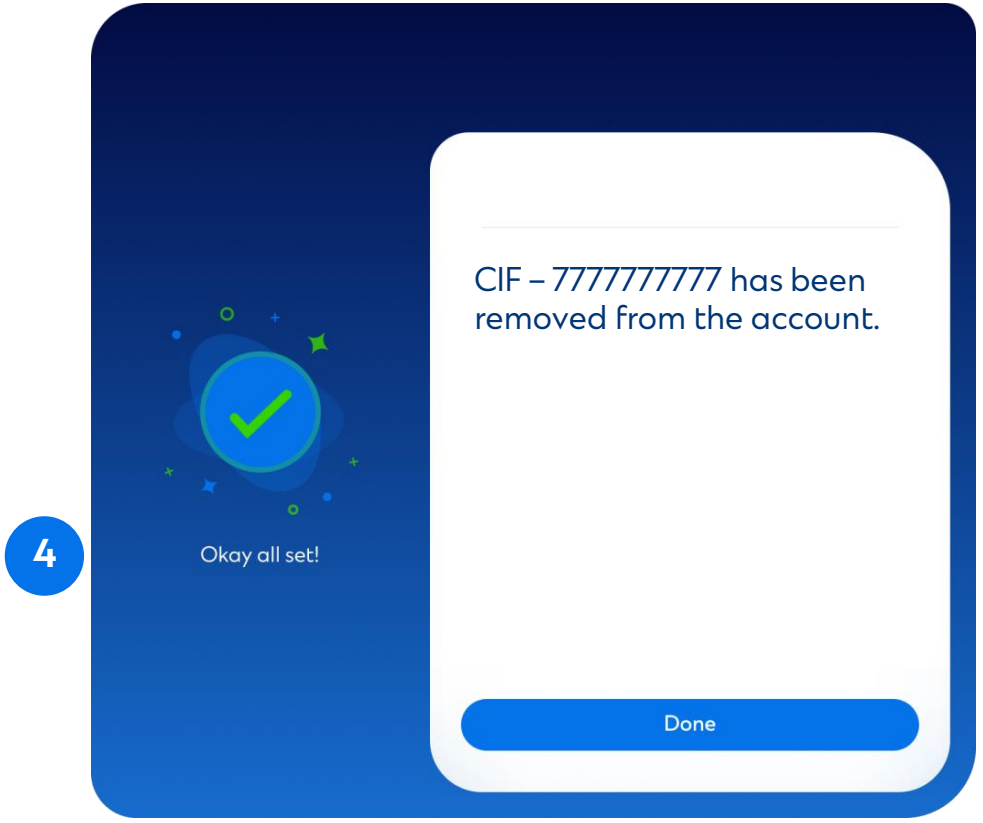
2 Click 🗑 icon next to the CIF which needs to be removed from your login profile.

If you delete the only CIF in your login profile, your account will be disabled and you would be required to re-register in the app.

Manage CIF – Remove a CIF (continued)



3 Click **Yes, remove it** on the prompt to confirm your action.



4 The relevant CIF is removed from your login profile.

Manage Notifications

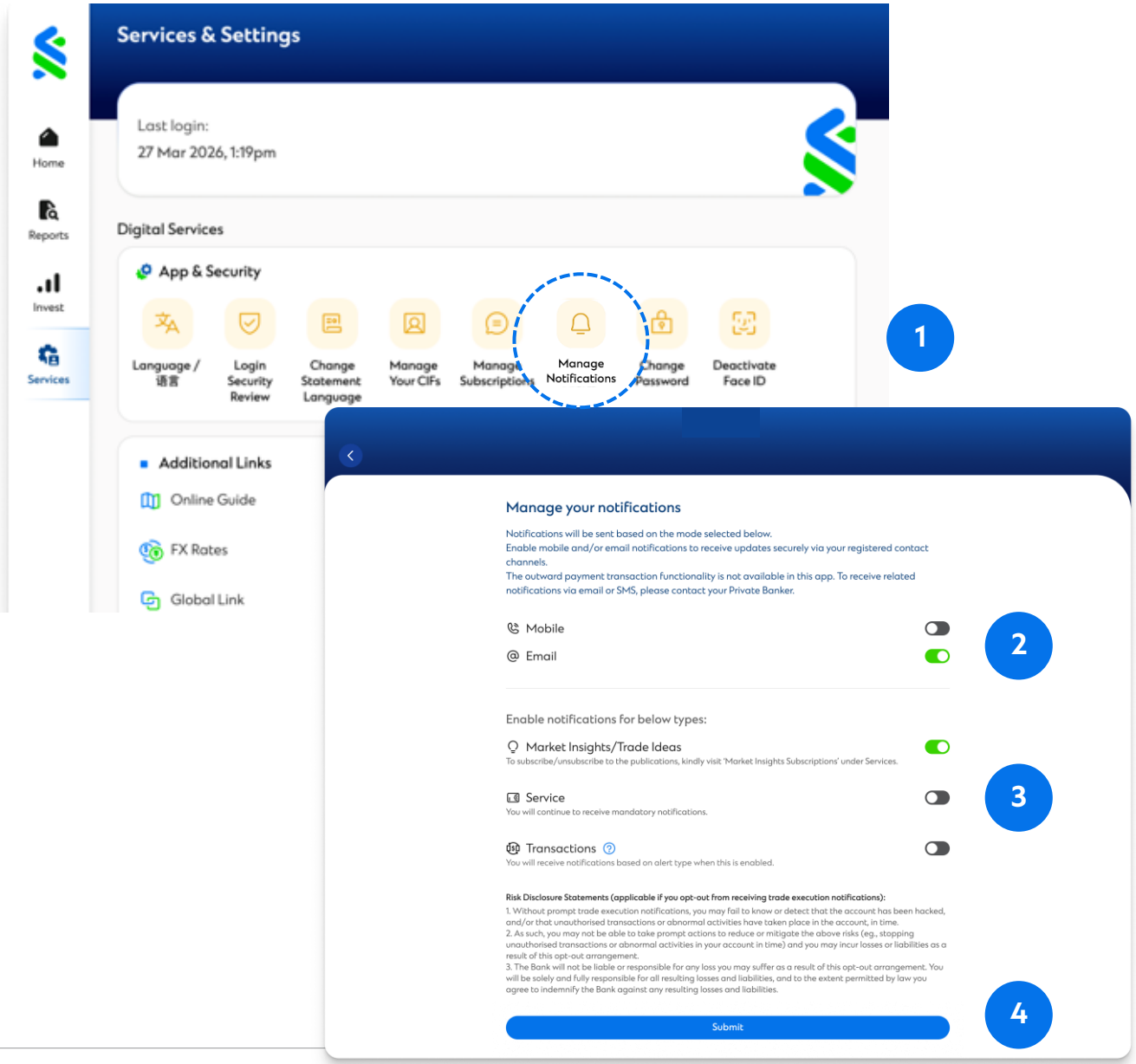
This feature allows you to customize your notification preferences.

1. Click **Manage Notifications** via the **Services** main menu to customize alerts for 'Market Insights'.

2. **Notifications Mode** : you may opt in/out for the email and mobile push notifications (mobile app only) for the various notification types.

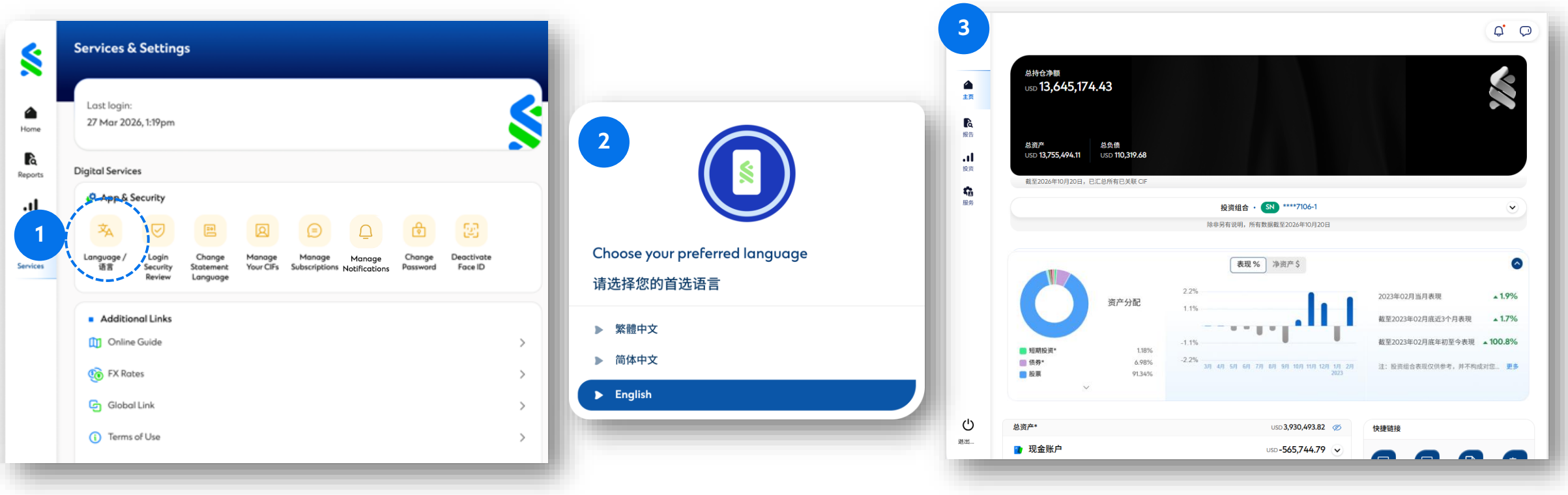
3. **Notifications Types** : Slide the toggle button to the left if you no longer wish to receive the particular notification.
   - **Market Insights/ Trade Ideas :** In house publication notifications
   - **Service :** Preference update confirmation notification
   - **Transactions :** Equity Linked Structured Products and Equity Trading Order alert notifications

4. Click **Submit** at the bottom of the screen for confirming the changes.



Change the preferred language

This feature allows you to change your language preferences on the app.



1. Click **Language / 语言** via the **Services** main menu.

2. Choose your preferred language,
   - 繁體中文 (Traditional Chinese)
   - 简体中文 (Simplified Chinese)
   - English

3. Once a language (Traditional Chinese or Simplified Chinese) is selected, all pages, including Home, will display content in that language.

PUBLIC

User Access Management

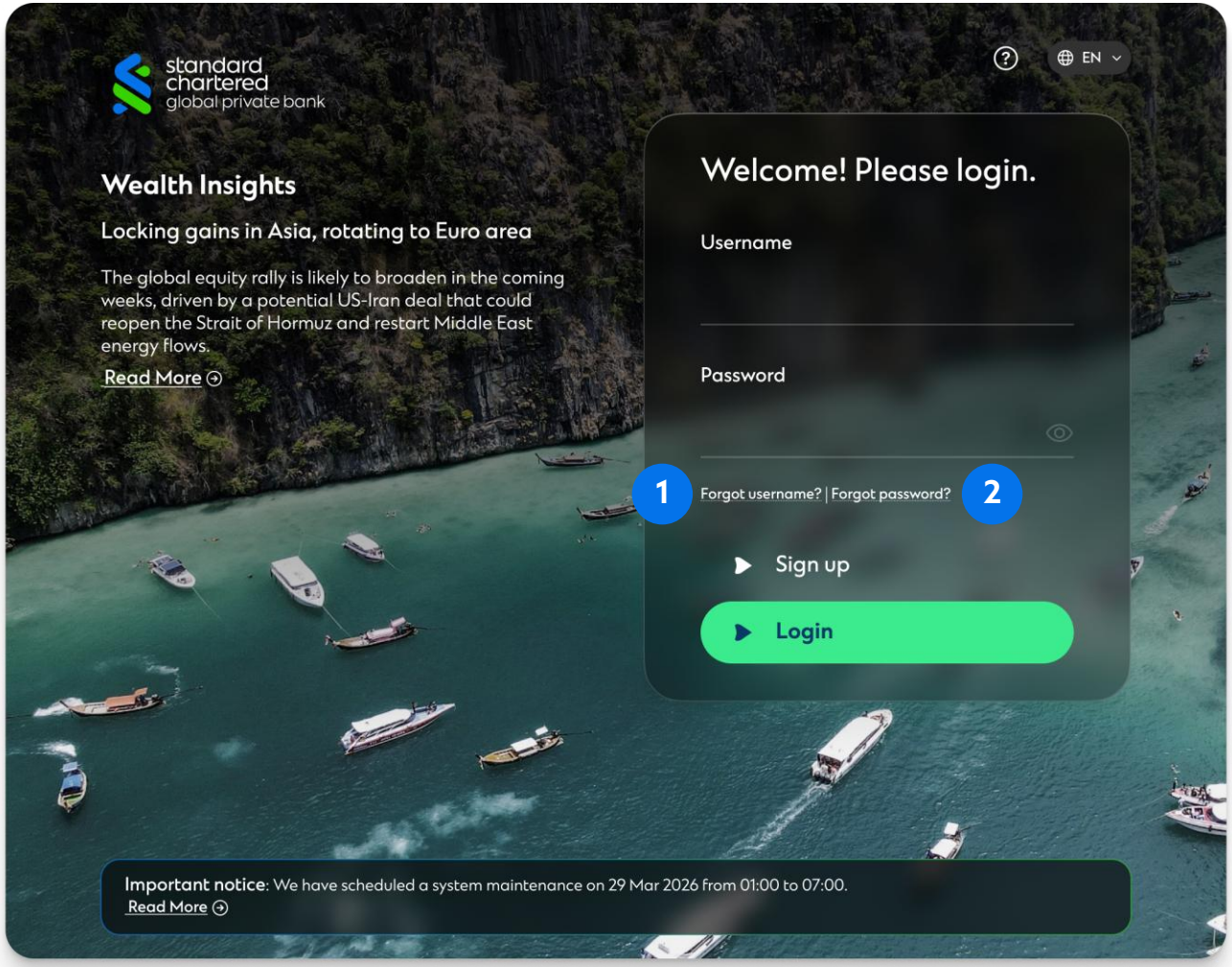


Reset Credentials

You may reset your Credentials from the login screen.

1. If you have forgotten your username, select **Forgot Username?** to reset your login credentials. The process is similar to Registration/Sign up.

2. If you have forgotten your password, select **Forgot Password?** and follow the steps as indicated.

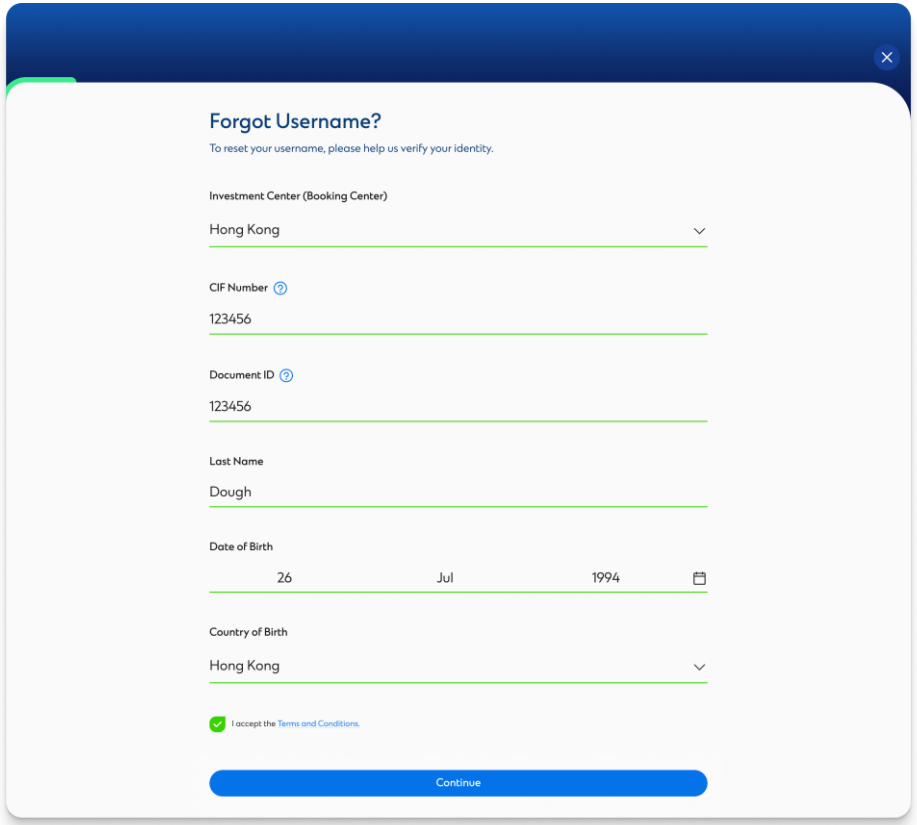


Your account will be disabled after 3 consecutive unsuccessful login attempts. You can re-enable the account by updating your password using Forgot Password feature.

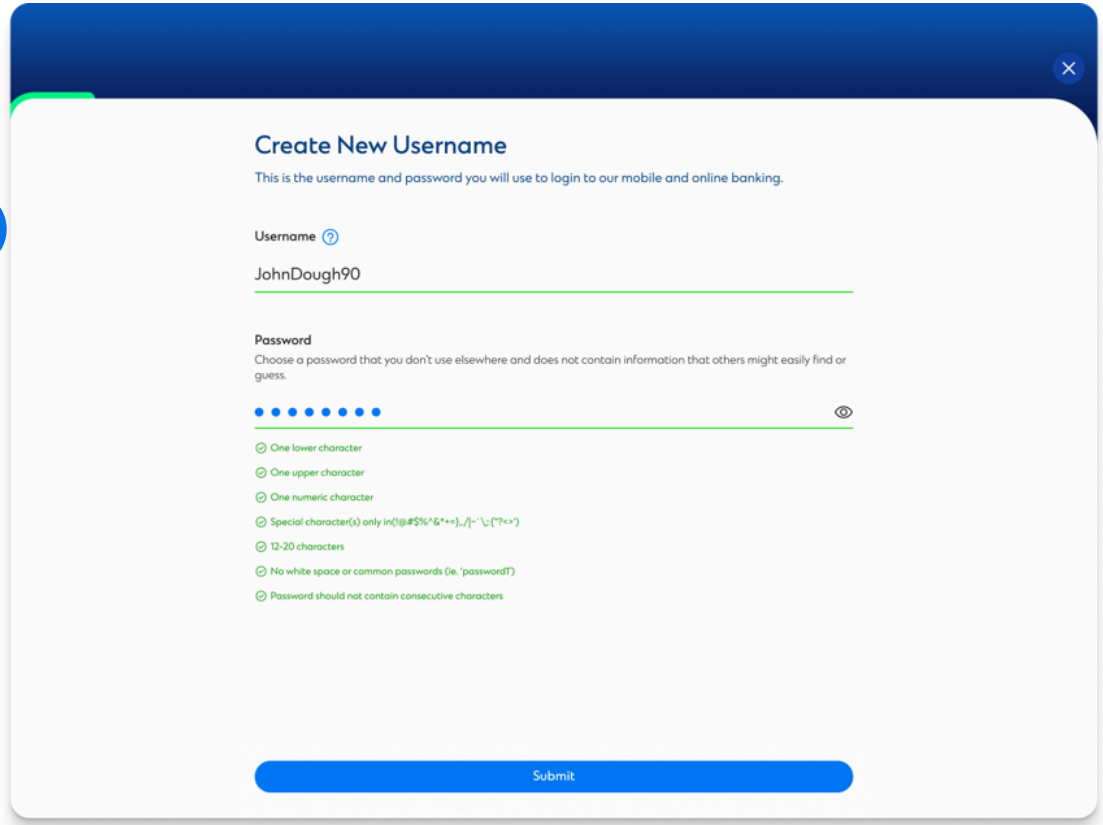
Forgot Username

Click **Forgot Username?** from the login screen and follow these steps.

1



2



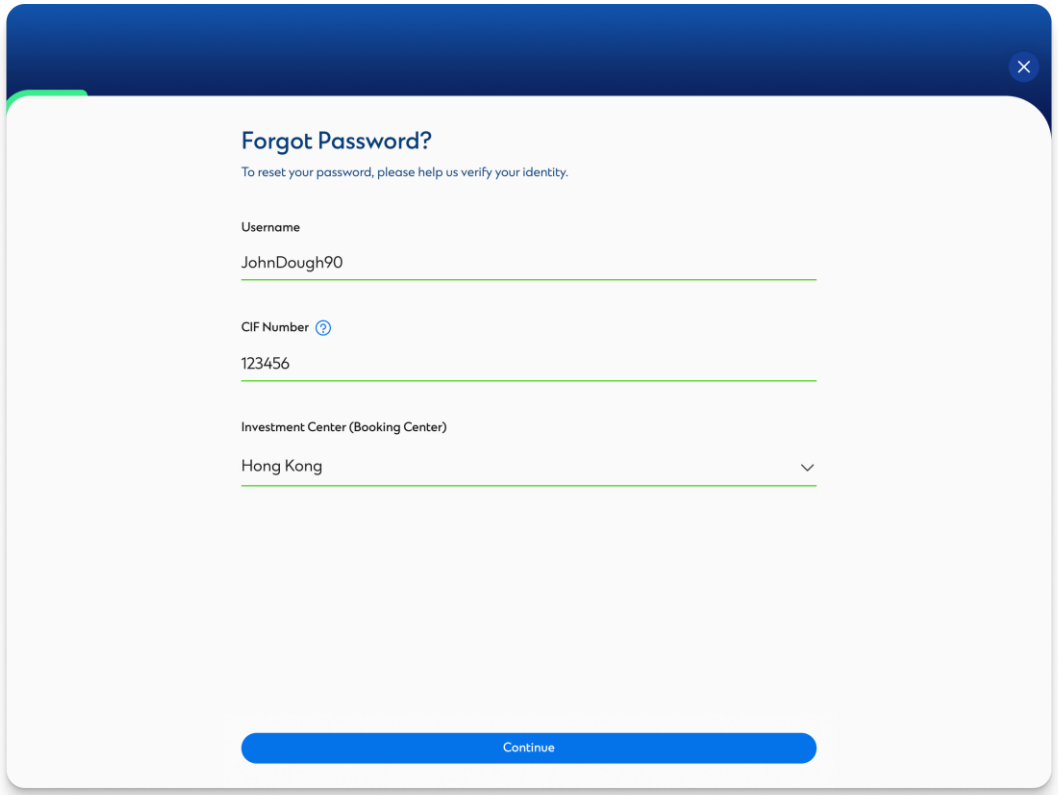
1. Key in Investment Centre (Booking Centre), CIF, Document ID, Last Name, Date of Birth, Country of Birth and click **Continue**.

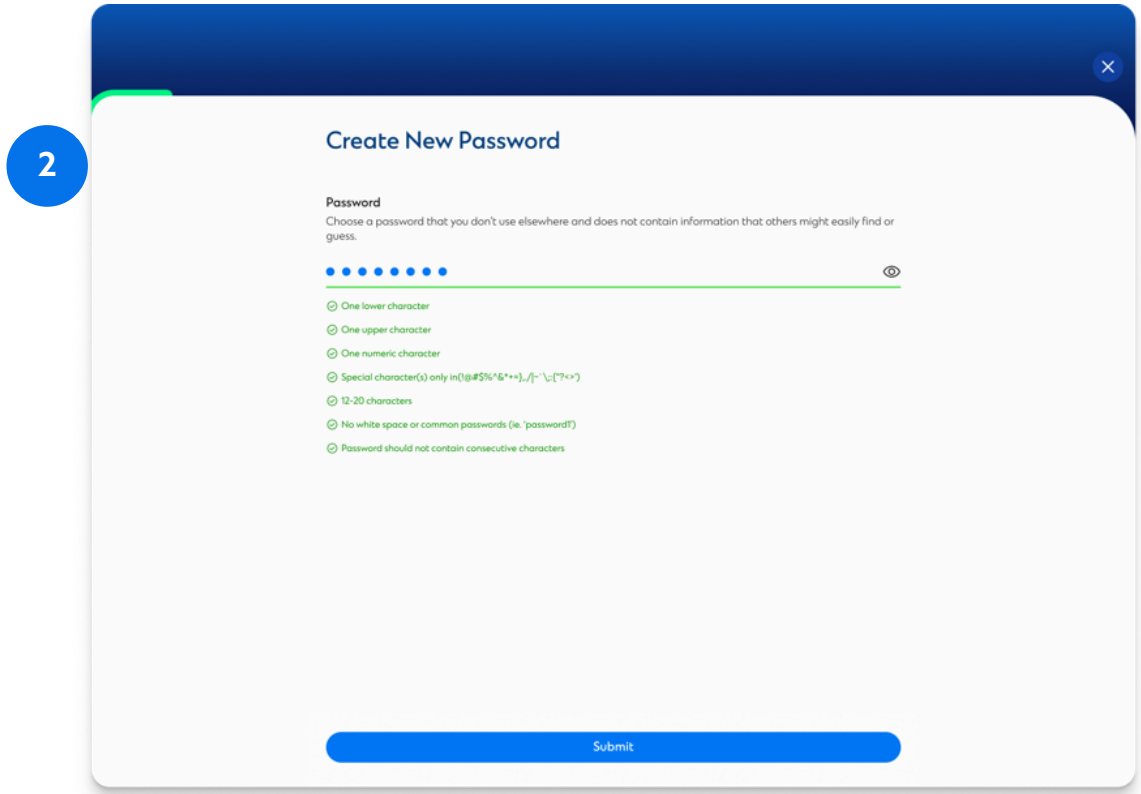
2. After OTP validation success, create your new Username and Password. Click **Submit**.

If you do not receive an OTP, click 'Resend OTP' or contact your Private Banker.

Forgot Password

Click **Forgot Password?** from the login screen and follow these steps.





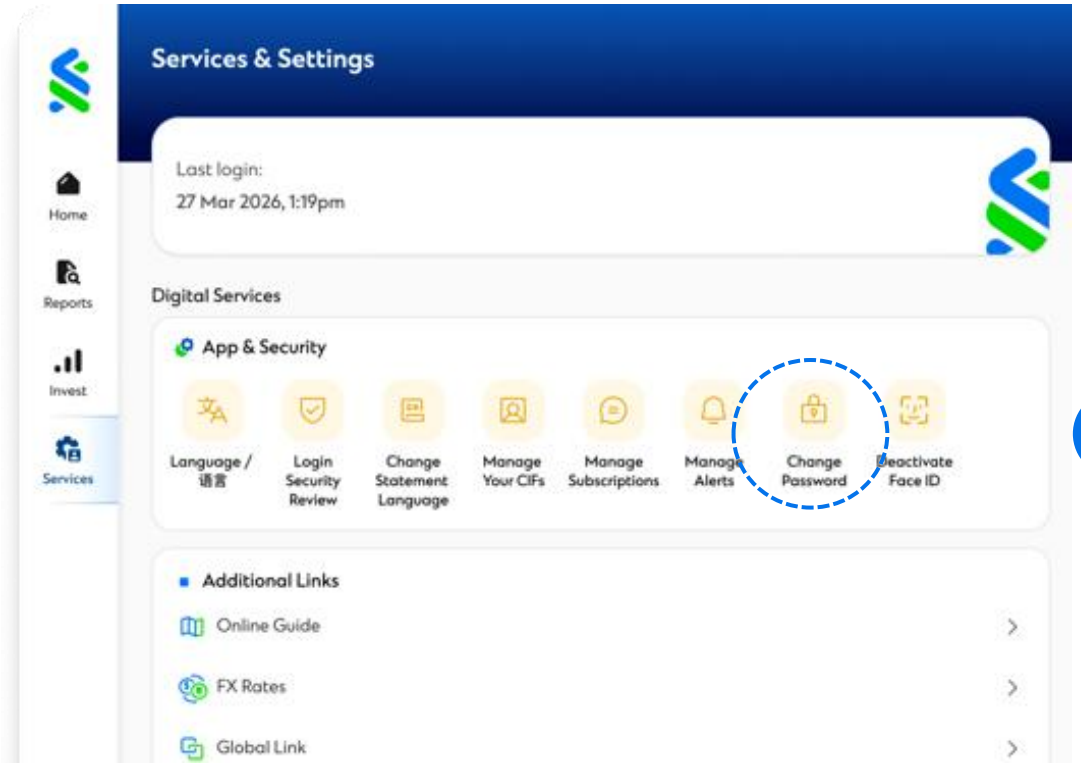
1. Key in your current Username, CIF, Investment Centre (Booking Centre) and click **Continue**.

2. After OTP validation success, Create your new password and click **Submit**.

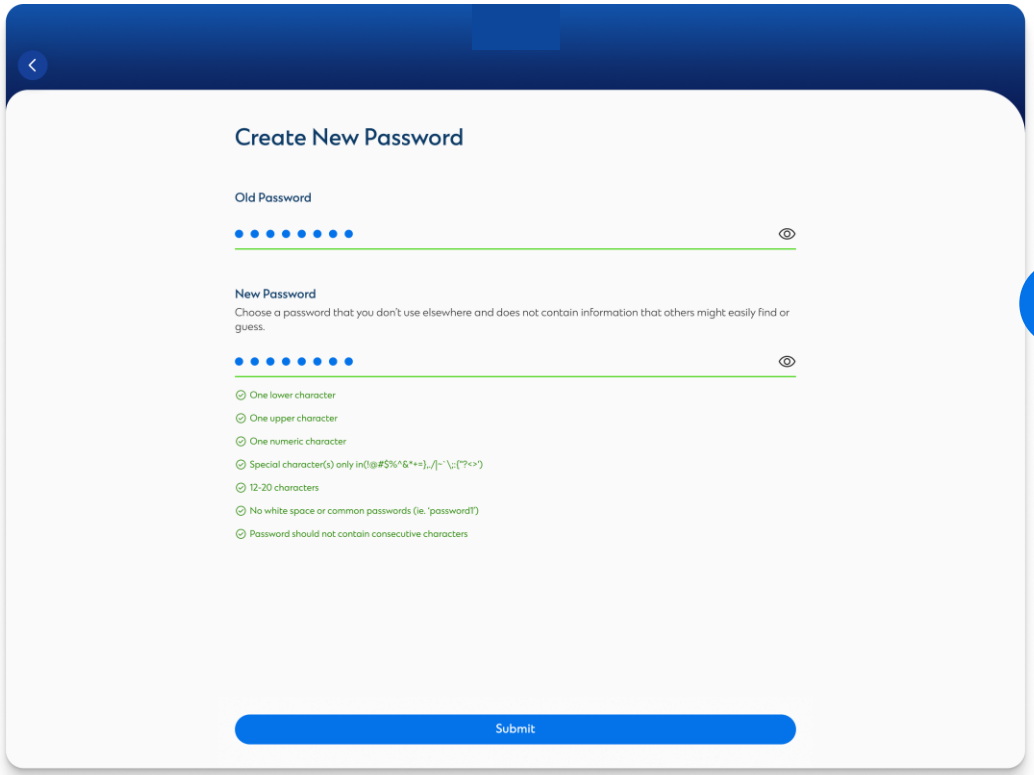
Your new password should not be the same as previous passwords used in SC Private Bank application.

Change Password

You are required to change your password once a year. SC Global Private Bank app will remind you to change the password seven days prior to the password expiry date.



1



2

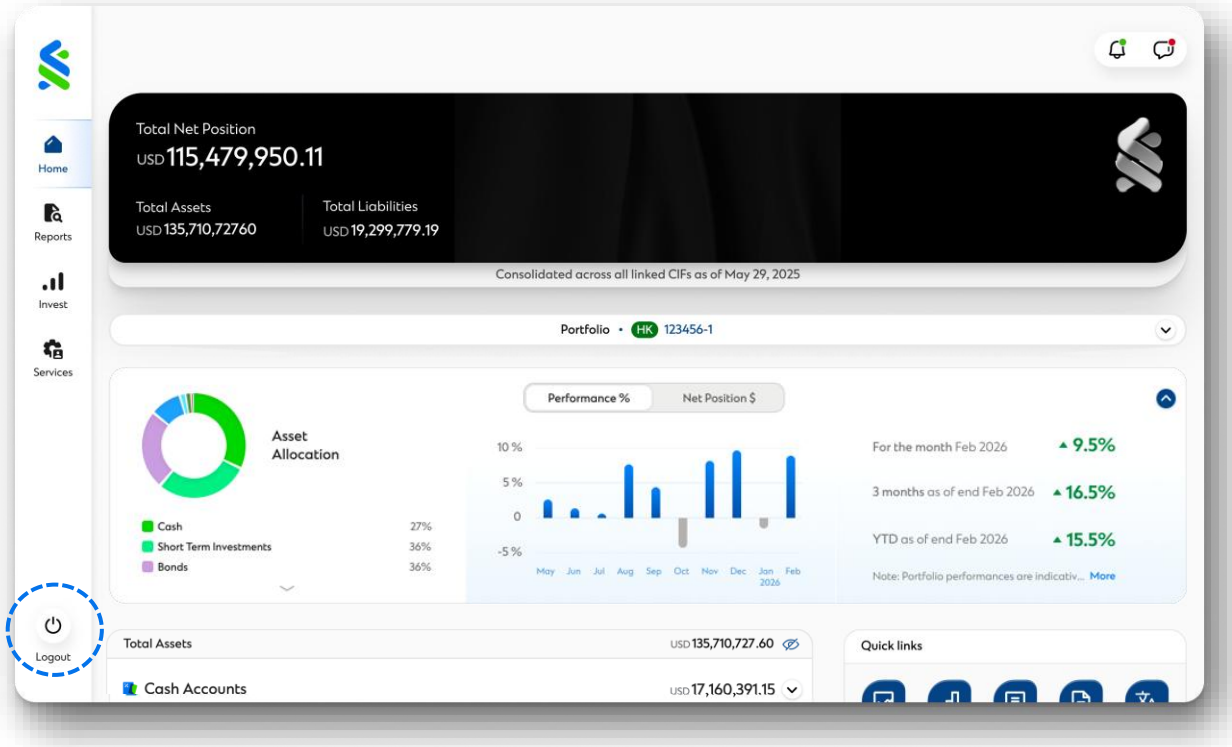
1 Click **Change Password** within **Services**.

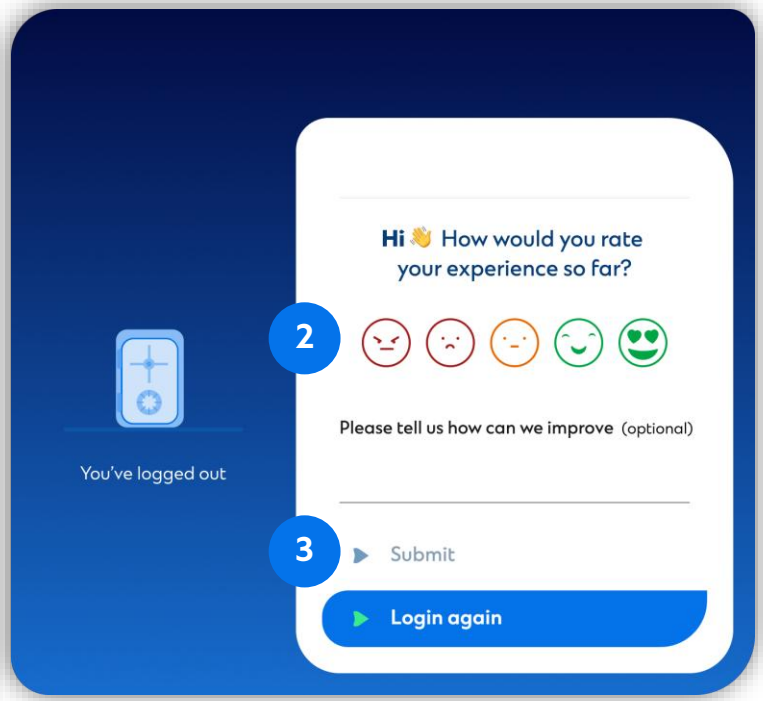
2 Key in your current password and new password. Once you have completed your update, click **Submit**.

Your new password should not be the same as previous passwords used in SC Private Bank application.

Logout

Log out of the session.







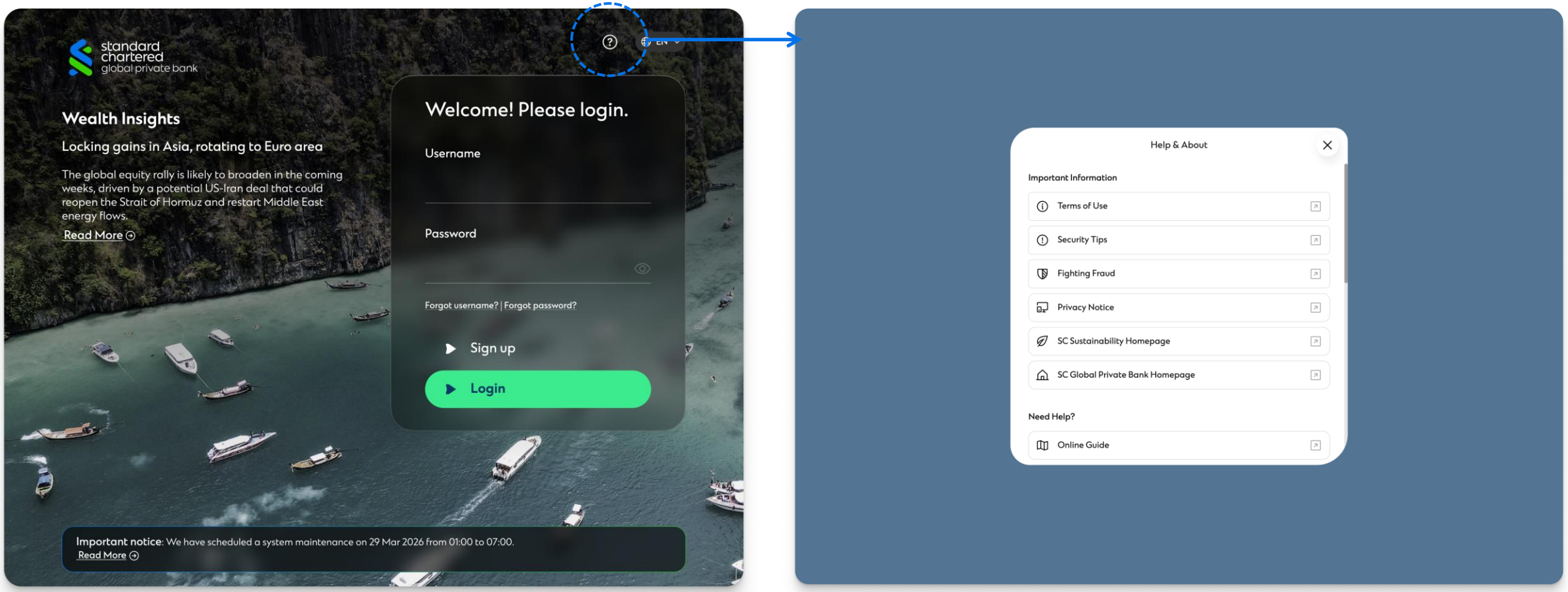
1. Click **Logout** icon ⏻ to signoff the session..
2. Rate your experience. You could provide additional comments if any.
3. Click **Submit**.

PUBLIC

Help & About

Help & About

Help & About brings together useful support links and information about our app.



These useful support links are also available under **Additional Links** in **Services & Settings** after login..

PUBLIC

SC Global Private Bank app

DESKTOP USER GUIDE