



standard  
chartered  
private bank

# SC Private Bank App User Guide

Aug 2022

Best Private Bank for  
Customer Experience

Best Digital Customer  
Experience in Private  
Banking

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Awarded by  
**Digital CX Awards 2020**





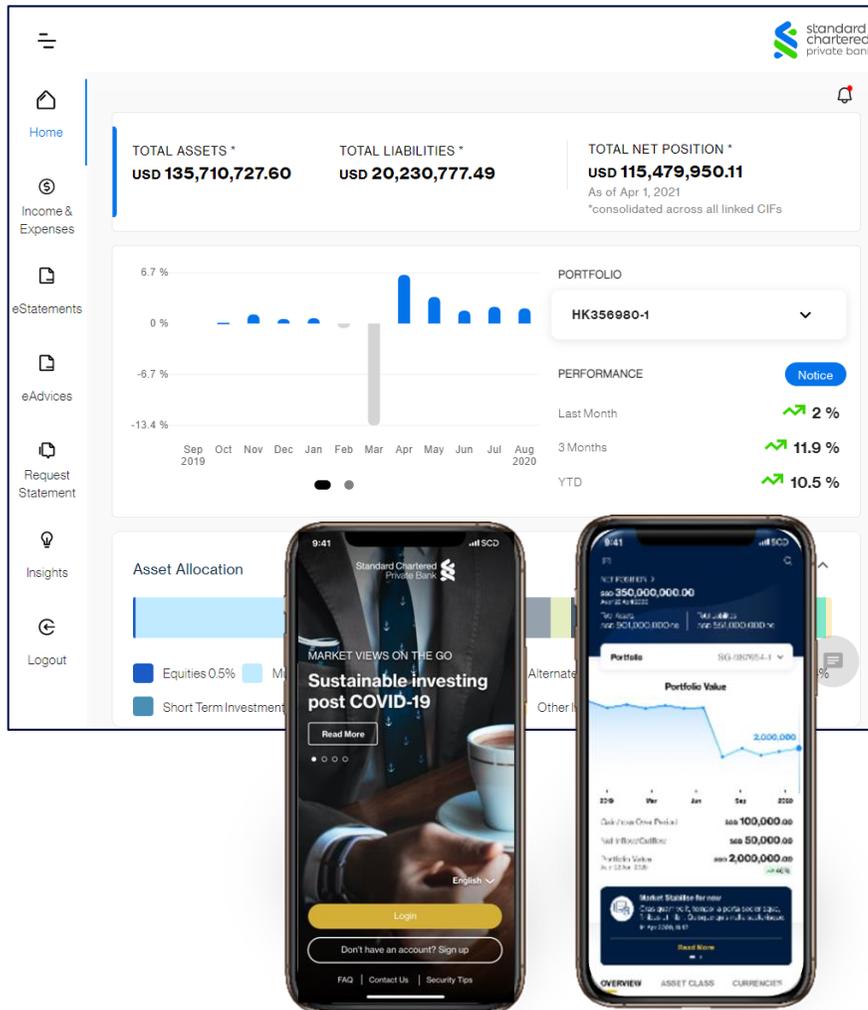
# Content

- i. Registration, Login and Manage Credentials
- ii. View & Manage Your Investment Portfolio
- iii. Communication Hub, Access & Subscribe to Market Insights
- iv. Send Messages and Files to Your Private Banker
- v. Manage Your Preferences



# Features & Benefits

The SC Private Bank App provides a simple and intuitive user interface for you to manage your Global Investment Portfolio



Access to view your Investment Portfolio with Performance Analysis Globally, via desktop, tablet or mobile.



Read and Subscribe for our CIO's Investment Publications such as Global Market Outlook, Market Watch, House Views via our 'Market Insights'



Access the in-app messaging tool which gives you a secured space of communication with your Private Banker to discuss trade ideas and your investment needs



Manage your preferences online. You may change your password, add or delete accounts and opt-in for electronic Statements and Advices.



# 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.**

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English 1

MARKET INSIGHTS

## Looking for a catch-up

- Since May this year, "buy Asia" had been a profitable stance, with a turn in Chinese policy direction towards supporting growth underscoring strong outperformance of regional equity markets and, to a lesser extent, regional USD bonds.
- This outperformance has reversed in recent weeks, over the last three weeks, Asia ex-Japan equities have fallen 1.0%, while global equities rose 4.8%. Asian USD bonds similarly lagged global peers, albeit more modestly.

Read more

Welcome to Standard Chartered Private Bank

[Login](#) | [Sign Up](#) 2

Case Sensitive Username \*

Case Sensitive Password \*

LOGIN

[Forgot Username](#)

[Forgot Password](#)

Important Notice Protect your Personal Digital Keys; Beware of Fraudulent Links. Please be aware that there have been multiple reports of scammers, at times impersonating as staff from the bank, targeting customers through emails, voice calls, and messag... [Read More](#)

- 1 You may select either English, Simplified Chinese or Traditional Chinese.
- 2 To register for SC Private Bank App, update your contact details before clicking **Sign Up** on the login screen.



# Registration

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## MARKET INSIGHTS

### Looking for a catch-up

- Since May this year, "buy Asia" had been a profitable stance, with a turn in Chinese policy direction towards supporting growth underscoring strong outperformance of regional equity markets and, to a lesser extent, regional USD bonds.
- This outperformance has reversed in recent weeks; over the last three weeks, Asia ex-Japan equities have fallen 1.0%, while global equities rose 4.8%. Asian USD bonds similarly lagged global peers, albeit more modestly.

[Read more](#)

#### Enter Details

Step 1 of 4

1 Investment Centre (Booking Centre) \*

2 CIF Number \*

3 Document ID \*

[< Back](#) [NEXT](#)

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Follow the steps as outlined below to register

- 1 Your Investment Centre
- 2 Your Portfolio (CIF) Number
- 3 Your Document ID provided to the bank during onboarding



# Registration

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## MARKET INSIGHTS

### Looking for a catch-up

- Since May this year, "buy Asia" had been a profitable stance, with a turn in Chinese policy direction towards supporting growth underscoring strong outperformance of regional equity markets and, to a lesser extent, regional USD bonds.
- This outperformance has reversed in recent weeks; over the last three weeks, Asia ex-Japan equities have fallen 1.0%, while global equities rose 4.8%. Asian USD bonds similarly lagged global peers, albeit more modestly.

[Read more](#)

#### Enter Details

Step 2 of 4

Last Name \* 4

Date of Birth \* 5

Country of Birth \* 6

I accept the [Terms and Conditions](#)

[< Back](#) [NEXT](#)

ⓘ Important Notice Protect your Personal Digital Keys, Beware of Fraudulent Links. Please be aware that there have been multiple reports of scammers, at times impersonating as staff from the bank, targeting customers through emails, voice calls, and messag... [Read More](#)

Follow the steps as outlined below to register

- 4 Your Last Name
- 5 Your Date of Birth
- 6 Your Country of Birth



# 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 for registration*

7 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.



# Registration

The screenshot shows a mobile banking interface. At the top, there is a navigation bar with links: Online Guide | Terms of Use | Security Tips | Fighting Fraud | Contact Us. The Standard Chartered Private Bank logo is in the top right corner. The main content area features a background image of a Venetian canal with gondolas. A dark overlay contains a 'MARKET INSIGHTS' section titled 'Looking for a catch-up' with two bullet points and a 'Read more' button. A white modal window titled 'Send One Time Password' is overlaid on the right, indicating 'Step 3 of 4'. It states: 'An SMS with the OTP has been sent to your \*\*\*\*2028 mobile number'. Below this is a field for 'Enter your OTP' with a dashed line for input, a 'Resend OTP' link, and a '< Cancel' button. At the bottom of the screen, there is an 'Important Notice' regarding Personal Digital Keys and fraudulent links, with a 'Read More' link.

A 6 digit one-time-password (OTP) will be sent to your registered mobile number. If you are using a different mobile number, please contact your Private Banker

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



# Registration

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## MARKET INSIGHTS

### Looking for a catch-up

- Since May this year, "buy Asia" had been a profitable stance, with a turn in Chinese policy direction towards supporting growth underscoring strong outperformance of regional equity markets and, to a lesser extent, regional USD bonds.
- This outperformance has reversed in recent weeks; over the last three weeks, Asia ex-Japan equities have fallen 1.0%, while global equities rose 4.8%. Asian USD bonds similarly lagged global peers, albeit more modestly.

[Read more](#)

#### Create New Account

Step 4 of 4

Case Sensitive Username \*  
YourUserName

Case Sensitive Password \*  
.....|

13 / 20

8

Password must contain:

- one lower character
- one upper character
- one numeric character
- one special character (!@#%&\*+=,./|~\':;"?<>)
- 12-20 characters
- no common passwords (ie. "password!")
- password should not contain consecutive characters

[< Back](#) [NEXT](#)

Important Notice Protect your Personal Digital Keys, Beware of Fraudulent Links. Please be aware that there have been multiple reports of scammers, at times impersonating as staff from the bank, targeting customers through emails, voice calls, and messag... [Read More](#)

8

Create a unique Username and Password using alphanumeric characters

- Please do not share your Username or Password with anyone
- If you forget your Username or Password, you will be required to repeat the registration process and create a new Username and Password



# Registration

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MARKET INSIGHTS

## Looking for a catch-up

- Since May this year, "buy Asia" had been a profitable stance, with a turn in Chinese policy direction towards growth underscoring strong outperformance of regional equity markets and, to a lesser extent, regional US
- This outperformance has reversed in recent weeks, over the last three weeks, Asia ex-Japan equities have f while global equities rose 4.8%. Asian USD bonds similarly lagged global peers, albeit more modestly.

Read more

Success!

Thank you for signing up for Standard Chartered Private Bank application.

LOGIN

9

Important Notice Protect your Personal Digital Keys; Beware of Fraudulent Links. Please be aware that there have been multiple reports of scammers, at times impersonating as staff from the bank, targeting customers through emails, voice calls, and messag... [Read More](#)

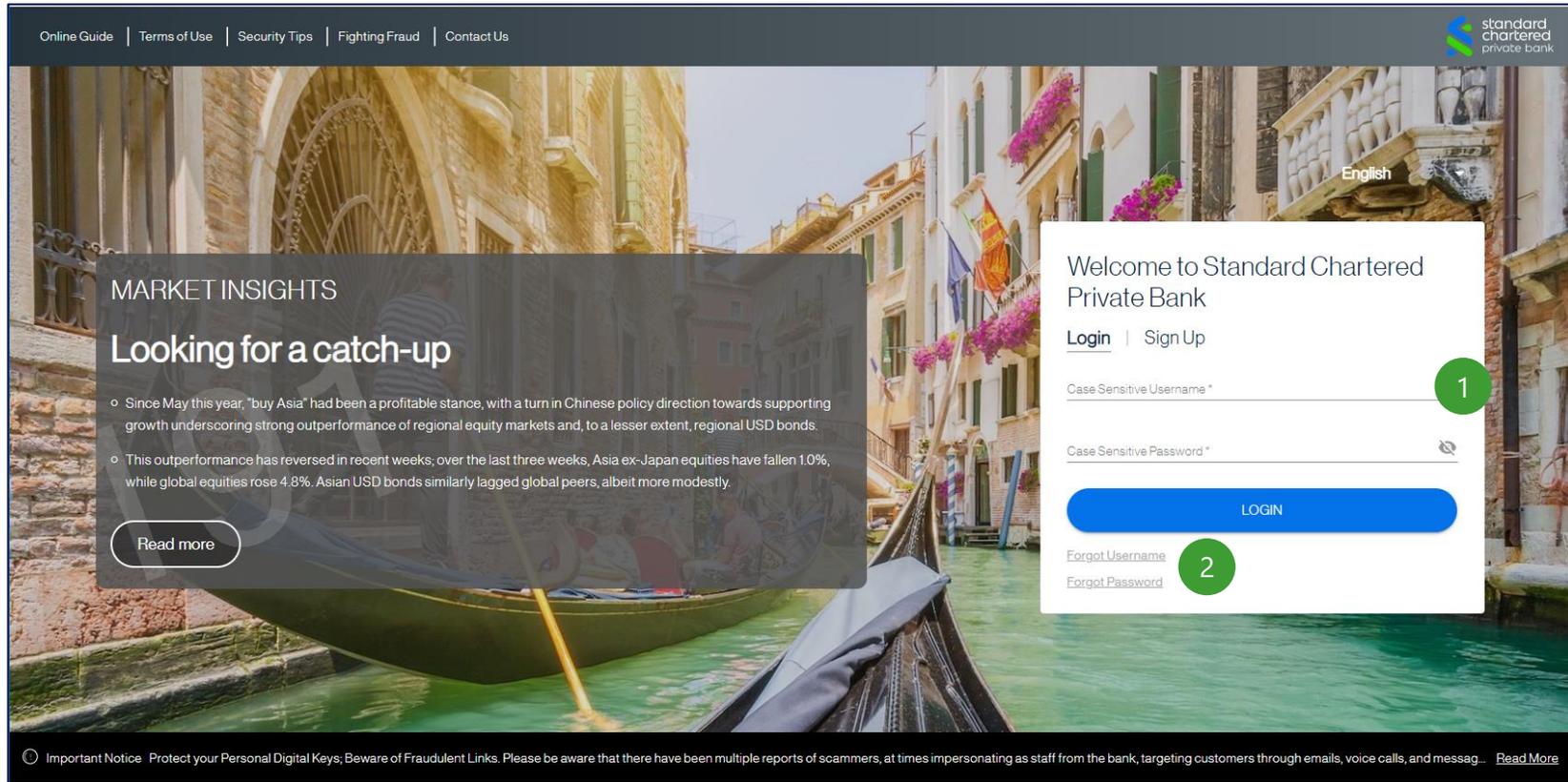
9

Registration is now complete. Click on the Login button and enter the newly created Username and Password to access SC Private Bank App.

- Upon login you will be view your consolidated Private Banking accounts globally. Transaction history will only be available on the next working day.



# Log In or Reset Credentials

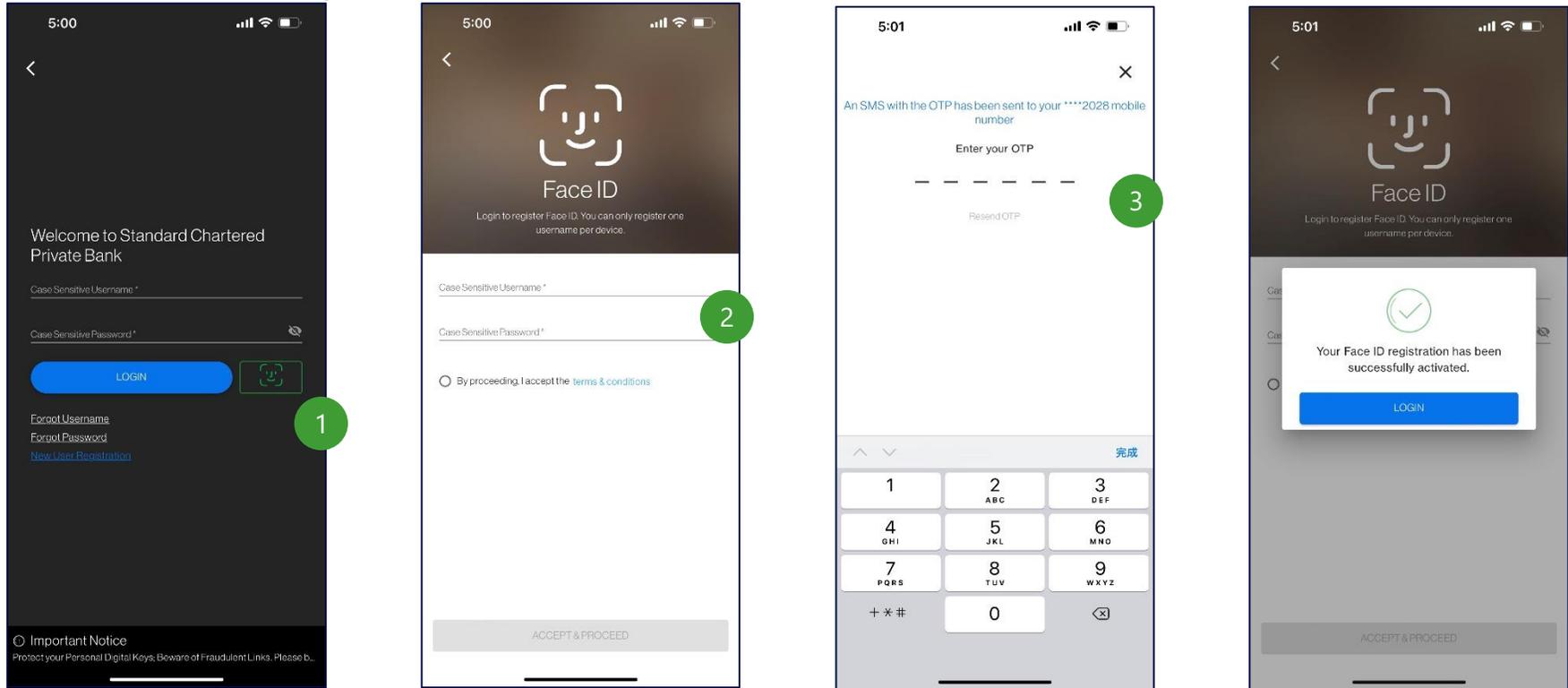


- 1 Login to SC Private Bank App with a valid Username / Password.
- 2 If you have forgotten your username, select 'Forget Username' to reset your login credentials  
If you have forgotten your password, select 'Forgot Password' and follow the steps as indicated.



# Log In or Reset Credentials

## Touch ID or Face ID Registration



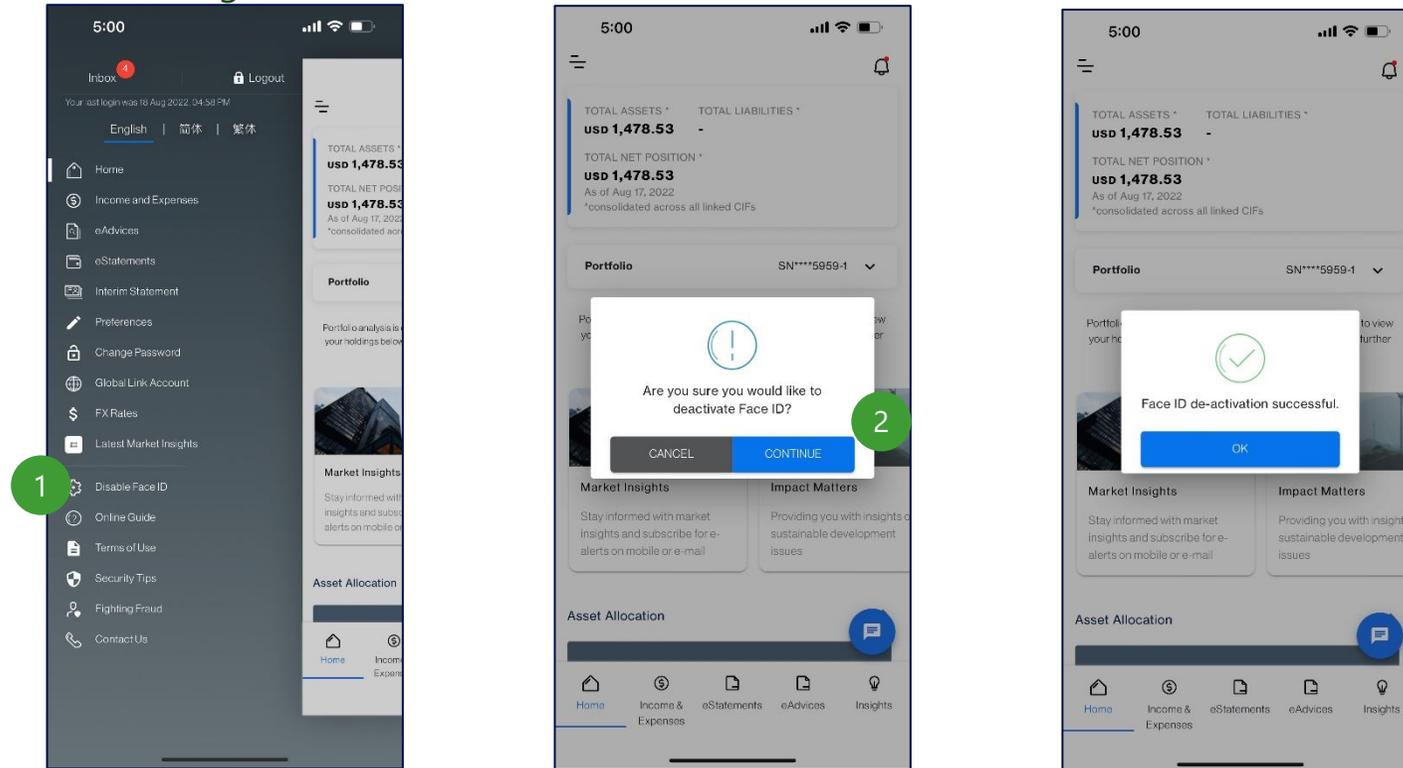
- 1 Tap on the icon in the SC Private Bank App login screen.
- 2 Activate Touch/Face ID login service by logging in with your username and password.
- 3 Enter the One Time Password sent to your mobile number.

Upon successfully activation, an email notification will be sent to your registered external email address



# Log In or Reset Credentials

## Touch ID or Face ID Registration



1 Go to the side navigation bar and selected 'De-activate Face/Touch ID'

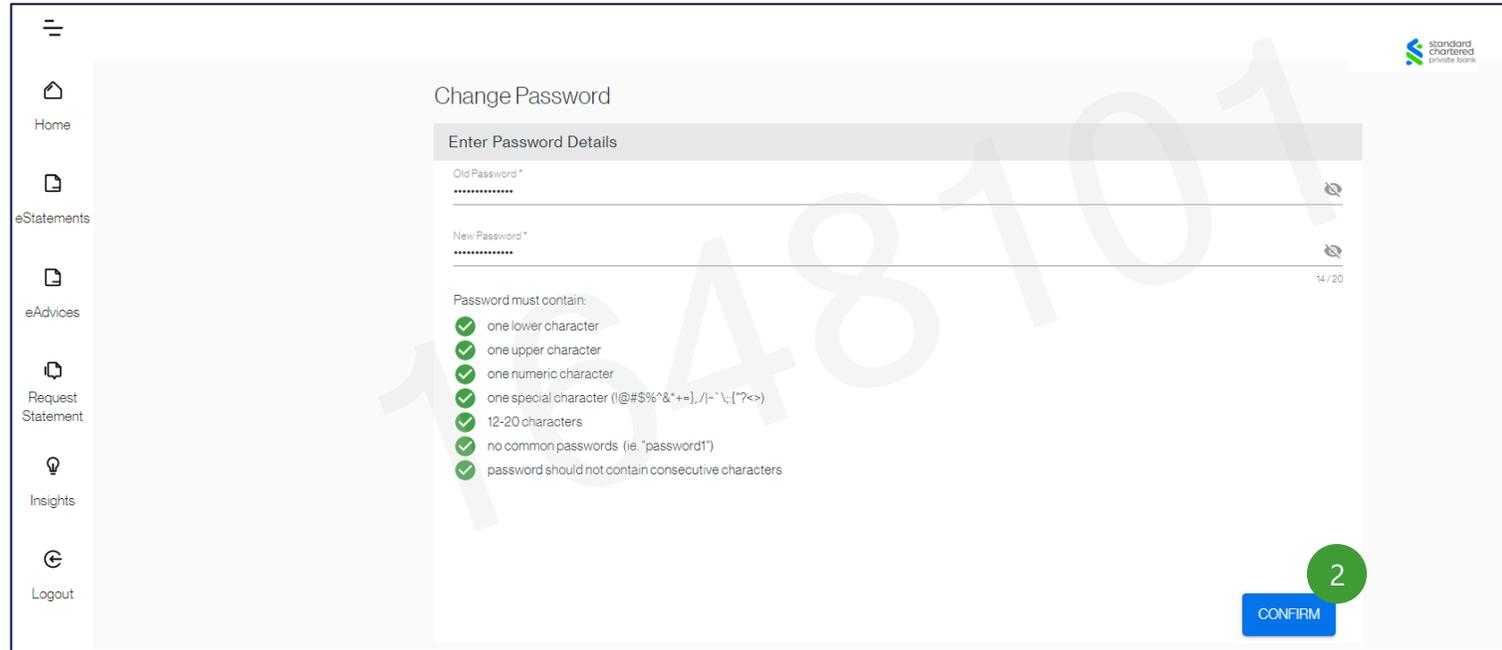
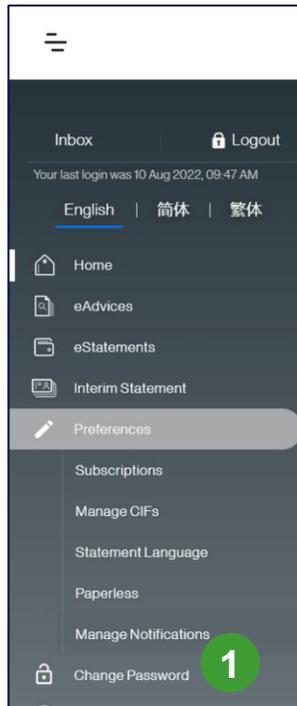
2 Click on "Continue" to confirm on the de-activation

Upon successful de-activation, an email notification will be sent to your registered external email address



# Log In or Reset Credentials

## Change Password



1 This feature can be found within the menu

2 Once you have completed your update, click **Confirm**

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



# Log In or Reset Credentials

## Change Password

2 ✓ Your Password has been changed successfully.

### Change Password

Enter Password Details

Old Password\*

New Password\* 0/20

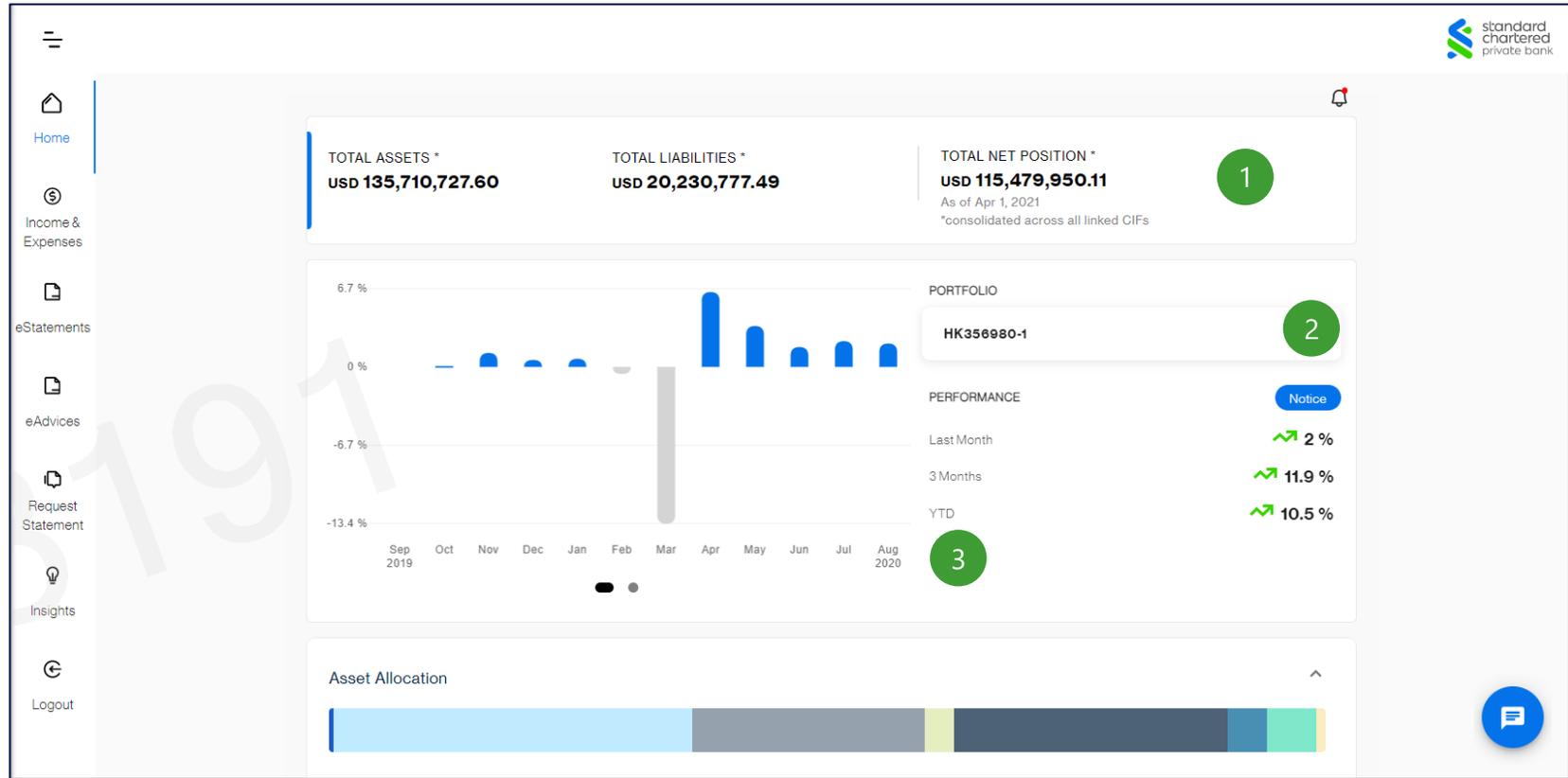
Password must contain:

- one lower character
- one upper character
- one numeric character
- one special character (!@#\$%^&\*+=),./|~\;:{}<>)
- 12-20 characters
- no common passwords (ie. "password1")
- password should not contain consecutive characters

2 The system will acknowledge the successful change of your password.



# View Your Investment Portfolio

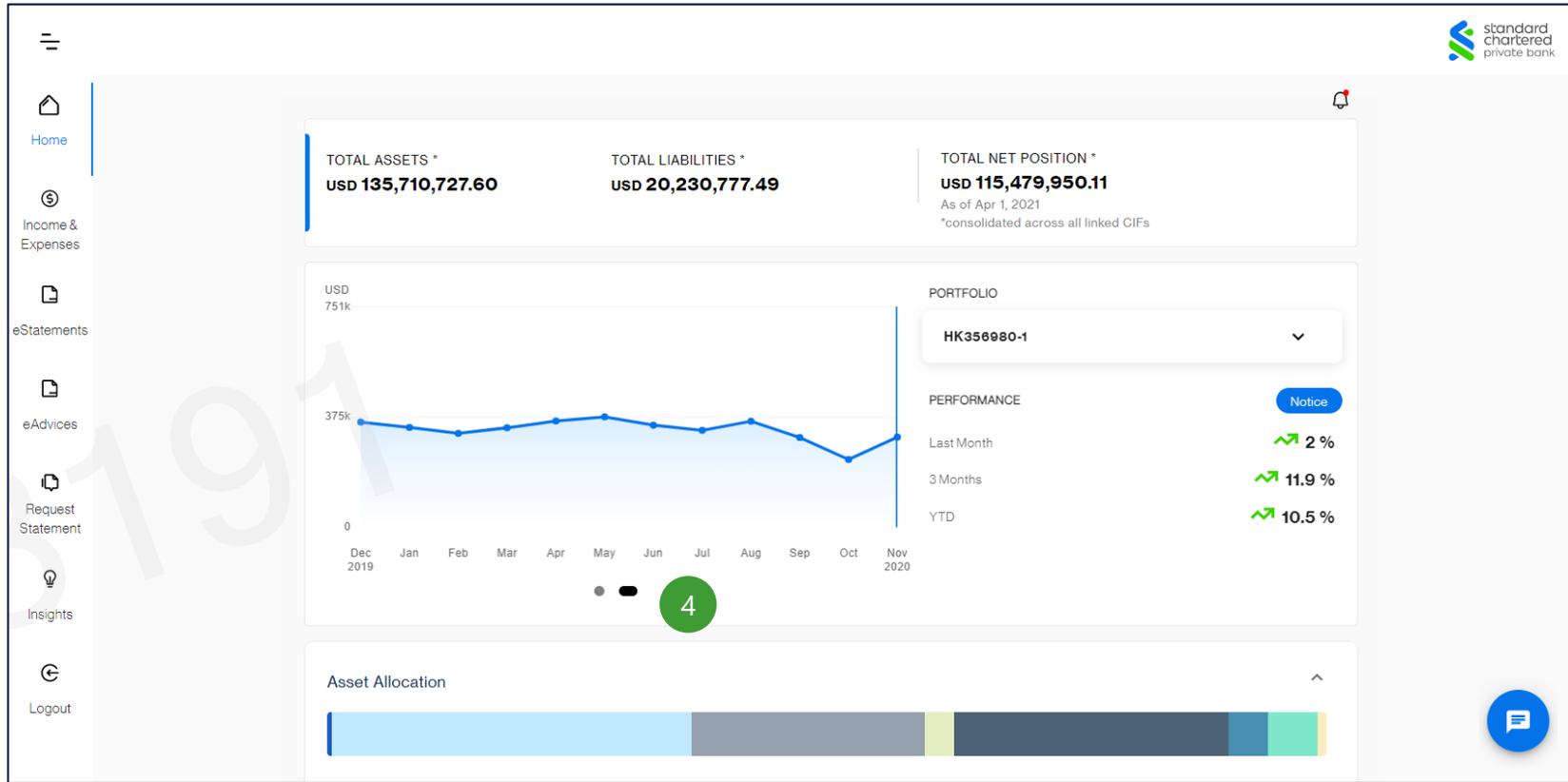


- 1 Your Total Net Position across your holdings
- 2 Portfolio Selector – Switch between multiple portfolios across your Private Banking accounts
- 3 Portfolio Performance Analysis – View an indication of your portfolio's health at a glance

*Account balances reflected are as of the close of business on the previous day.*



# View Your Investment Portfolio



4 Swipe Right to view Your Historical Net Positions across your portfolios

*Account balances reflected are as of the close of business on the previous day.*



# View Your Investment Portfolio

**5** Total Assets - \$ 62,652,423<sup>52</sup> USD

Category	Market Value	Unrealised P&L
<b>Equities</b>	\$ 281,070 <sup>49</sup> USD	▲ \$ 25,375 <sup>62</sup> USD
<b>Mutual Funds</b>	\$ 22,572,917 <sup>92</sup> USD	▲ \$ 1,629,804 <sup>96</sup> USD
<b>Bonds</b>	\$ 14,597,623 <sup>38</sup> USD	▲ \$ 317,653 <sup>00</sup> USD
<b>Alternate Investments</b>	\$ 1,852,562 <sup>14</sup> USD	▲ \$ 20,562 <sup>35</sup> USD
<b>Cash Accounts</b>	\$ 17,160,391 <sup>15</sup> USD	
<b>Short Term Investments</b>	\$ 2,525,714 <sup>13</sup> USD	
<b>Portfolio Investments</b>	\$ 3,085,811 <sup>91</sup> USD	
<b>Other Investments</b>	\$ 576,332 <sup>40</sup> USD	

**Total Liabilities - \$ 12,273,258<sup>30</sup> USD**

Category	Market Value
<b>Loans</b>	\$ 5,273,258 <sup>30</sup> USD
<b>Letter of Credit and Guarantees</b>	\$ 7,000,000 <sup>00</sup> USD

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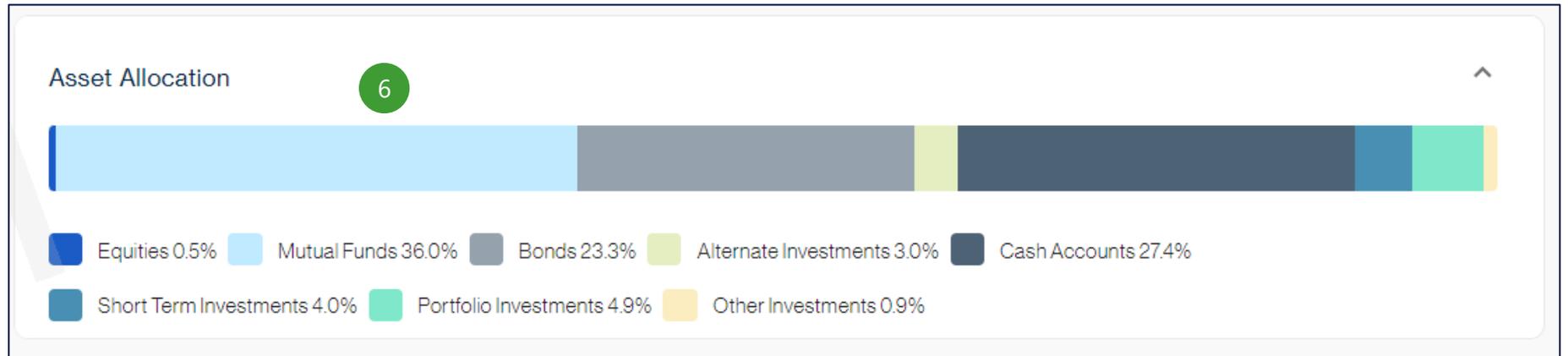
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**5** Displays total assets and liabilities held in portfolios you have registered on SC Private Bank App. Investment categories are listed with corresponding balance in your reference currency (USD etc.)



# View Your Investment Portfolio

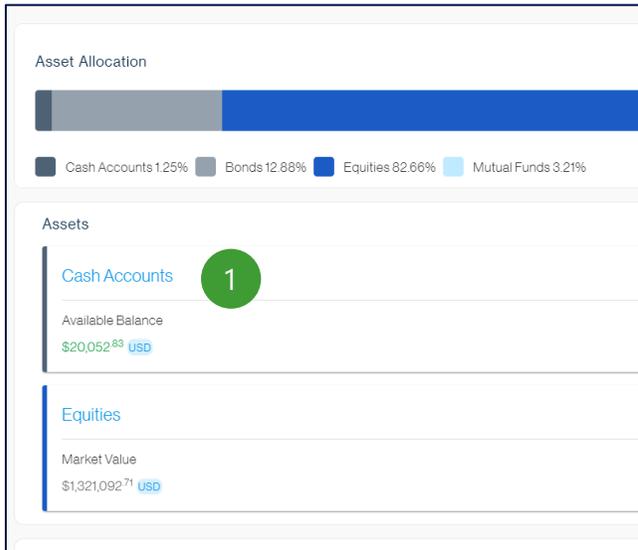


6 Represents total holdings across your selected portfolio CIF by investment category.



# View Your Investment Portfolio

## Investment Category Details: Cash Accounts



You are in [Dashboard](#) > [CIF SN66625](#) > [Cash Accounts](#)

Account Balance  
**\$20,052.83 USD**  
As of Nov 4, 2016

Filter

Accounts	Account Number	Reference Currency	Balance In Reference Currency	Currency	Available Balance
DEMAND/IB ACCOUNT 2	6129996200	USD	(33,497.80)	USD	(33,497.80)
SAVINGS ACCT ACCOUNT	6203837101	USD	0.00	SGD	0.00
DEMAND/IB ACCOUNT	6500162206	USD	109.44	GBP	89.83
DEMAND/IB ACCOUNT	6500721205	USD	(24,024.14)	EUR	(21,920.83)
DEMAND/IB ACCOUNT	6500760608	USD	77,115.48	JPY	8,095,363.00
DEMAND/IB ACCOUNT	6500977106	USD	139.98	CHF	138.45
SAVINGS ACCT ACCOUNT	6503837000	USD	0.00	USD	0.00
DEMAND/IB ACCOUNT	6505116401	USD	233.06	AUD	306.14

Items Per Page: 20

1 - 8 of 8 |< < > >|

- 1 Scroll down and click on investment category to display sub-accounts or investment holdings.
- 2 Click on each sub-account or investment holding for further details.



# View Your Investment Portfolio

## Investment Category Details: Cash Accounts

The screenshot shows a user interface for viewing investment portfolio details. A modal window is overlaid on the dashboard, indicating that an SMS with the OTP has been sent to the user's mobile number. The modal contains a text input field for entering the OTP and a 'Resend OTP' button. The background dashboard displays various investment categories and their values.

**Asset Allocation**

- Equities 0.5%
- Mutual Funds 27.4%
- Portfolio Investments 4.9%
- Short Term Investments 4.0%

**Total Assets - \$ 62,652,423**

Category	Market Value	Unrealised P&L
Equities	\$ 281,070 <sup>49</sup> USD	\$ 25,375 <sup>82</sup> USD
Bonds	\$ 14,597,623 <sup>38</sup> USD	\$ 317,653 <sup>00</sup> USD
Alternate Investments	\$ 1,852,562 <sup>14</sup> USD	\$ 20,562 <sup>85</sup> USD

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3 Enter a One Time Password (OTP) where required to view account details.



# View Your Investment Portfolio

## Investment Category Details: Cash Accounts

You are in [Dashboard](#) > [CIF SN66625](#) > [Cash Accounts](#) > DEMAND IB ACCOUNT-6500760608

Account Balance  
**¥8,095,363<sup>00</sup> JPY**  
As of Nov 4, 2016

Showing account transactions from 01/Jan/99 - 01/Feb/14

Filter

Date	Transaction Details	Credit or Debit	Balance	Currency
16 Oct 2013	PAYMENT OF LOAN PRINCIPAL	(16,606,454 <sup>00</sup> )	68,630 <sup>00</sup>	JPY
16 Oct 2013	LOAN INTEREST	(16,154 <sup>00</sup> )	16,675,084 <sup>00</sup>	JPY
16 Oct 2013	LOAN DRAWDOWN	16,622,608 <sup>00</sup>	16,691,238 <sup>00</sup>	JPY
12 Sep 2013	PAYMENT OF LOAN PRINCIPAL	(16,591,738 <sup>00</sup> )	68,630 <sup>00</sup>	JPY
12 Sep 2013	LOAN INTEREST	(14,716 <sup>00</sup> )	16,660,368 <sup>00</sup>	JPY
12 Sep 2013	LOAN DRAWDOWN	16,606,454 <sup>00</sup>	16,675,084 <sup>00</sup>	JPY

- 4 Download transaction data in PDF or CSV format.
- 5 Search transaction period by "Recent Days" or "Date Range" options
- 6 Detailed list of transactions for specified period.



# View Your Investment Portfolio

Investment Category Details: Applicable for Short Term Investments, Bonds, Equities, Mutual Funds, Portfolio Investments, Alternative Investments, Other Investments, Liabilities

You are in [Dashboard](#) > [SN22018-1](#) > [Bonds](#)

Valuation  
**\$ 3,105,859<sup>43</sup> USD**  
As of Jan 2, 2016

[NWD FINANCE \(BVI\) LTD 5.75% 05 OCT 2016 -](#) 1

Quantity	Market Price	Market Valuation	Average Purchase Price	Reference Currency Valuation	As of Date	Accrued Interest Period
200,000 <sup>00</sup>	87 <sup>476</sup>	\$174,952 <sup>00</sup> USD	102 <sup>125</sup>	\$174,952 <sup>00</sup> USD	01 Feb 2019	Interest 05 OCT 2018 - 04 FEB 2019

Accrued Interest in Valuation Currency    Accrued Interest in Reference Currency

\$3,769<sup>44</sup> USD                      \$3,769<sup>44</sup> USD

1

Investment details displayed include:

- Description, Quantity or Balances
- Market price & Average Purchase Price.
- Market Valuation & Reference Currency Valuation



# View Your Investment Portfolio

## Investment and Interest Income & Expenses

1

Income & Expense

Portfolio SG-987654

15 March 2021 Updated as of 20 March 2021

Interest on Demand Account AC6506311309 \$1,024,567.89 USD

Interest Amount \$2,182.85 USD Payment Date 01 Sep 2019

Interest from Deposits MM1717300014 \$1,567.89 USD

Interest Period From 16 March 2020 Interest Period To 15 March 2021 Interest Amount \$2,182.85 USD Principal Amount \$2,182.85 USD

Interest Amount \$2,182.85 USD

Income from Securities - For Dividend dolor sit amet Quarterly Coupon Lorem ipsum dolor \$1,567.89 USD

ISIN	Reference Number	Gross Dividend	Withholding Tax Amount
12345678910	ABC123DEF456	\$2,182.85 USD	\$2,182.85 USD

Payment Date 15 March 2021

Reinvested Income WRAP BGF EURO Lorem ipsum dolor \$1,567.89 USD

ISIN	Reference Number	Gross Dividend	Withholding Tax Amount
12345678910	ABC123DEF456	\$2,182.85 USD	\$2,182.85 USD

Net Dividend \$2,182.85 USD Payment Date 15 March 2021

4:12 INCOME & EXPENSE SCDESIGN

Portfolio SG-987654

15 March 2021 Updated as of 20 March 2021

Interest on Demand Account AC6506311309 \$1,024,567.89 USD

Interest Amount \$1,234.00 USD Payment Date 15 March 2021

Interest from Deposits MM1717300014 \$1,567.89 USD

Interest Period From 16 March 2020 Interest Period To 15 March 2021 Interest Amount \$1,234.00 USD Principal Amount \$1,234.00 USD

Interest Amount \$1,234.00 USD

Income from Securities - For Dividend Distribu... \$1,567.89 USD

Quarterly Coupon Lorem ipsum dolor

ISIN	Reference Number	Gross Dividend	Withholding Tax Amount
12345678910	ABC123DEF456	\$1,234.00 USD	\$1,234.00 USD

Net Dividend \$1,234.00 USD Payment Date 15 March 2021

Reinvested Income WRAP BGF EURO Lorem ipsum dolor \$1,567.89 USD

ISIN	Reference Number	Gross Dividend	Withholding Tax Amount
12345678910	ABC123DEF456	\$1,234.00 USD	\$1,234.00 USD

Net Dividend \$1,234.00 USD Payment Date 15 March 2021

View your Investment Income across SG and HK portfolios in various time periods

Investment Income details which includes gross and net dividend, less withholding tax amount for applicable instruments

4:12 FILTER SCDESIGN

SELECT ONE OR MORE OPTIONS RESET

Categories

- Interest from Demand Accounts
- Interest from Deposits
- Interest Paid from Loans
- Income from Securities
- Reinvested Income

Currencies

- AUD
- CAD
- CHF
- EUR
- GBP
- HKD
- JPY
- NZD
- SGD
- USD

CANCEL APPLY

Sort your investment income by categories

Sort your investment income by instrument currencies

1

Navigate to view your Investment and Dividend Income across portfolios in Singapore and Hong Kong



# View Your Investment Portfolio

Access Other Features with the Side Menu

1

The screenshot displays a user interface for viewing an investment portfolio. On the left, a dark side menu is open, listing various features such as Home, Income and Expenses, eAdvices, eStatements, Interim Statement, Preferences, Change Password, Global Link Account, FX Rates, Actions, Latest Market Insights, and Aggregator Management. The main content area shows a summary of 'TOTAL ASSETS \* USD 135,710,727.60' and a bar chart for 'Sep 2019' with values ranging from -13.4% to 6.7%.

Top Features:

- **Latest Market Insights:** Access to Daily Market Watch, Global Market Outlook
- **eStatements:** Access to electronic copies of your official bank statements
- **eAdvices:** Access to electronic copies of selected transaction advices
- **Interim Statement:** Request for same-day statement of your portfolio
- **Global Link Account:** Access your Retail Banking Accounts Globally



# View Your Investment Portfolio

## Retrieve eStatements

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eStatements

For Account

CIF \*  
SN116759

Portfolio \*  
SN116759-1

Type of Statement

All

Consolidated Statement

Collateralised Trading Account Statement

Discretionary Portfolio Statement

Interim Statement

19/8/2022

CONTINUE

1 Select eStatements

2 Select Portfolio and Type of Statement

- You may select to view Consolidated Statement, Collateralised Trading Account Statement, Discretionary Portfolio Statement or Interim Statement

3 Click on "Continue"



# View Your Investment Portfolio

## Retrieve eStatements

Results

eStatements for Portfolio SN115959-1

Search

Statement Date	Statement Type	View Statement
31 Jul 2019	Consolidated Statement	<a href="#">View More</a>
28 Jun 2019	Consolidated Statement	<a href="#">View in (English)</a> <a href="#">View in (Traditional Chinese)</a>
31 May 2019	Consolidated Statement	<a href="#">View More</a>
30 Apr 2019	Consolidated Statement	<a href="#">View More</a>
29 Mar 2019	Consolidated Statement	<a href="#">View More</a>

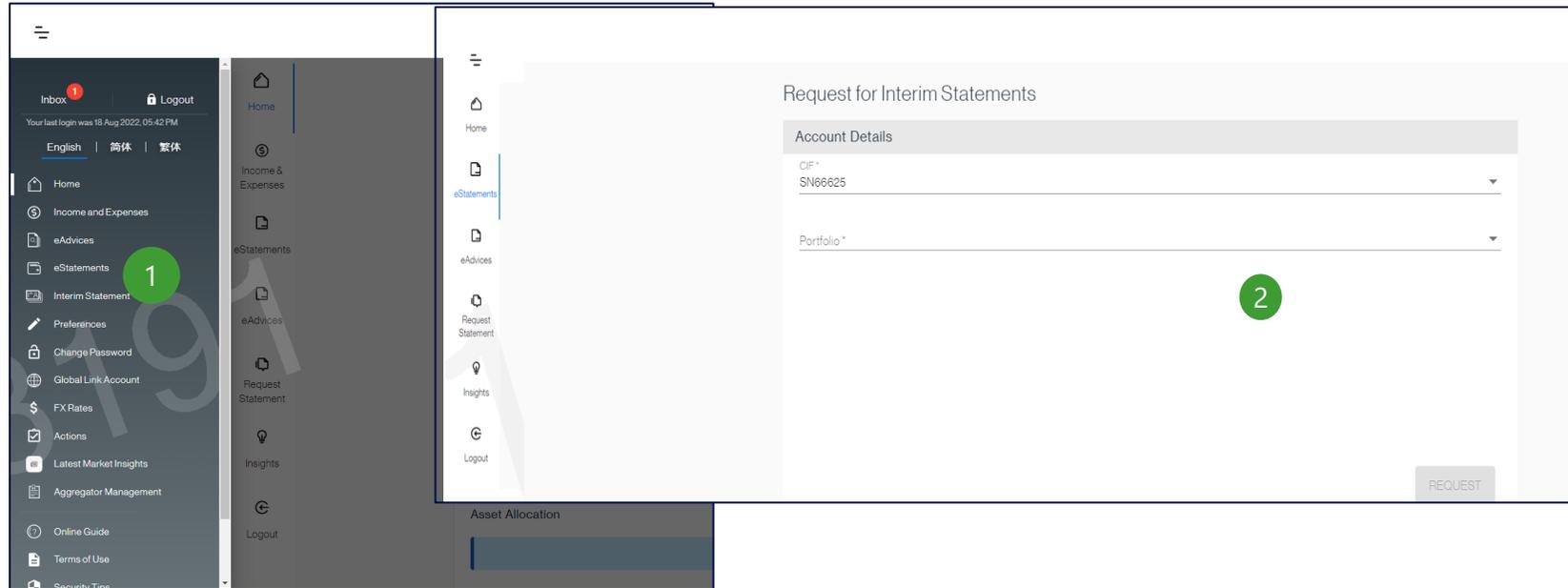
4

Select View or View More and select your preferred language where applicable



# View Your Investment Portfolio

## Interim (Same Day) Statement Generation



- 1 This feature can be accessed via the side navigator menu - Interim Statement
- 2 Select CIF and portfolio that you wish to request interim statements for and click on "Request"

Your request will be submitted, you will receive an email notification when it's available for download within the next 15 minutes



# View Your Investment Portfolio

## Retrieve Interim Statements

3 Once you receive notification that your statement is ready, you will be able to view and download your Interim Statement via 'eStatements'

4 Select 'Interim Statement' in the Statement Type field. Click Continue

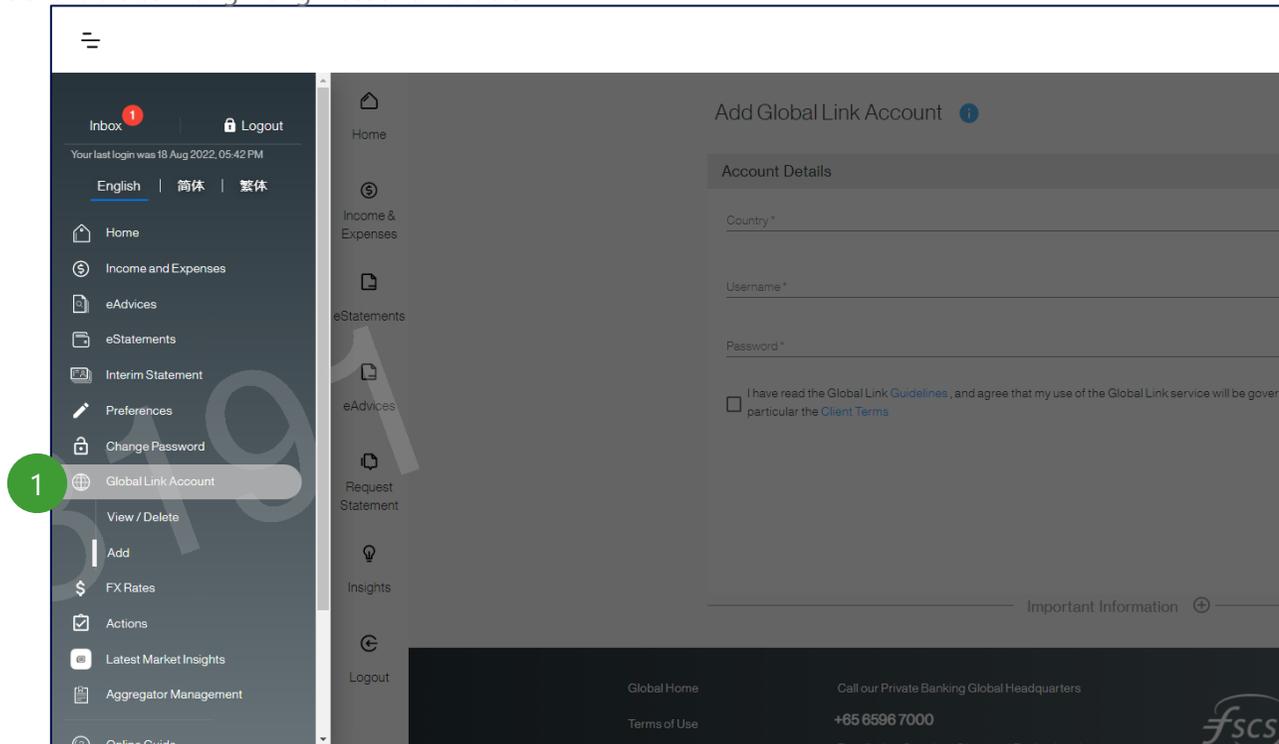


# View Your Investment Portfolio

## Global Link

Global Link allows you to view your Standard Chartered Retail Banking accounts globally through the SC Private Bank App.

! This service is not available to Hong Kong Account Holders



1 Click Add Global Link Account from side navigator menu

2 Global Link is a view-only service. You must login to the online banking account of each country to initiate transactions or to view transaction history details.



# View Your Investment Portfolio

## Global Link

Add Global Link Account ⓘ

Account Details

Country \*

Username \*

Password \*

I have read the Global Link [Guidelines](#), and agree that my use of the Global Link service will be governed by my banking agreement with you, in particular the [Client Terms](#)

ADD

Important Information ⊕

3 Username and Password must be the same as the respective country's online banking credentials.

4 Click Add to complete the process.

- You can add your retail accounts held in 20 countries: Singapore, India, UAE, Pakistan, Bahrain, China, Malaysia, Indonesia, Thailand, Bangladesh, Brunei, Vietnam, Philippines, Sri Lanka, Nigeria, Kenya, Botswana, Ghana, Zambia.
- Up to 5 accounts can be added to SC Private Bank App.



# Access Market Insights

## Investment Publications

Our Market Insights provides you daily updates on the market and house views by asset classes. Available in English, Simplified and Traditional Chinese

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English

### MARKET INSIGHTS

## Looking for a catch-up

- Since May this year, "buy Asia" had been a profitable stance, with a turn in Chinese policy direction towards supporting growth underscoring strong outperformance of regional equity markets and, to a lesser extent, regional USD bonds.
- This outperformance has reversed in recent weeks, over the last three weeks, Asia ex-Japan equities have fallen 1.0%, while global equities rose 4.8%. Asian USD bonds similarly lagged global peers, albeit more modestly.

[Read more](#)

1

Welcome to Standard Chartered Private Bank

[Login](#) | [Sign Up](#)

Case Sensitive Username \*

Case Sensitive Password \*

[Forgot Username](#)

[Forgot Password](#)

LOGIN

© Important Notice: Protect your Personal Digital Keys; Beware of Fraudulent Links. Please be aware that there have been multiple reports of scammers, at times impersonating as staff from the bank, targeting customers through emails, voice calls, and messag... [Read More](#)

1

Click on the 'Read more' on the landing page to access 'Market Insights'



# Access Market Insights

## Subscriptions

Stay alerted via e-mail or push notifications via our 'Subscriptions' feature for Market Insights

The screenshot shows the 'Market Insights Subscriptions' page. On the left, a dark sidebar contains a 'Preferences' menu with a green circle containing the number '2' next to the 'Subscriptions' option. The main content area is titled 'Market Insights Subscriptions' and features a section 'Publications that Interest You (Please select at least 1 publication)'. Below this, there are eight subscription cards, each with an icon, title, description, and a blue checkmark indicating it is selected:

- Global Market Outlook**: Captures the house view on key asset classes issued by the Global Investment Council on a monthly basis.
- Market Watch**: Issued in response to significant developments in key financial markets.
- Weekly Market View**: An end-of-week update on recent developments and the key events to look out for in the ensuing week.
- Daily FX Navigator**: A daily publication providing market commentary on FX markets, as well as high conviction trade ideas.
- Global Wealth Daily**: This publication summarizes key market moves and events across all major asset classes and geographies over the preceding day.
- 360 Perspectives**: A publication looking to build a comprehensive picture of both positives and negatives on an investment asset of interest.
- Investment Briefs**: A in-depth publication on the drivers and risks related to our bullish outstanding investment views.
- Daily Trade Ideas**: A selection of today's trade ideas across asset classes from Standard Chartered's CIO Office.

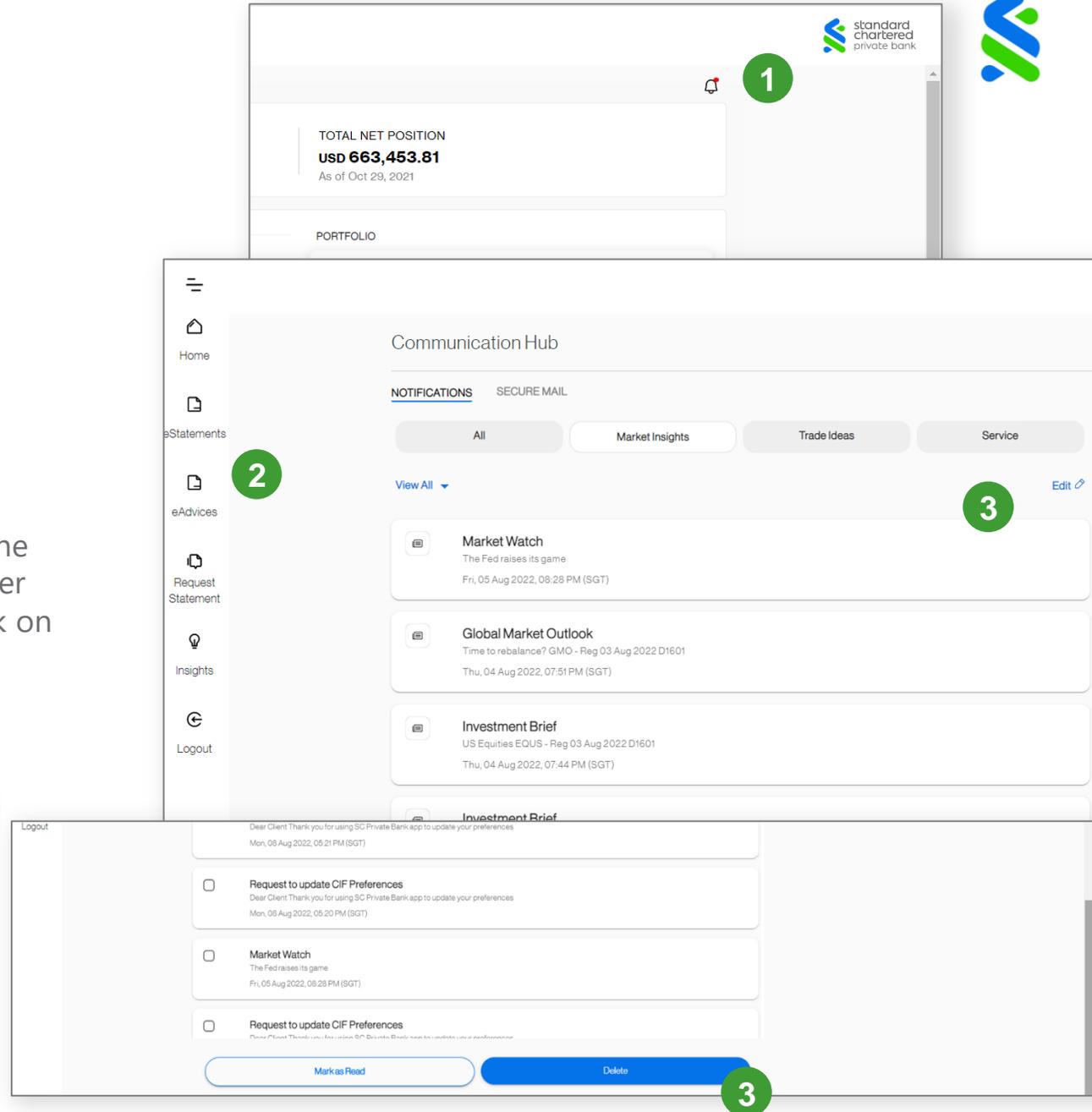
A blue 'OK' button is located at the bottom right of the subscription grid.

2 Click on the 'Preferences' > 'Subscriptions' via the main menu to customize alerts for 'Market Insights'

# Communication Hub

To view/edit notifications

- 1 Click on 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 on "view all".
- 3 To delete or mark notification as read, select the edit function  on the top right corner.



The screenshot displays the Communication Hub interface. At the top, the Standard Chartered Private Bank logo is visible. A notification bell icon is highlighted with a green circle '1'. Below the logo, the 'TOTAL NET POSITION' is shown as USD 663,453.81 as of Oct 29, 2021. The 'PORTFOLIO' section is partially visible. The main content area is titled 'Communication Hub' and has tabs for 'NOTIFICATIONS' and 'SECURE MAIL'. Under 'NOTIFICATIONS', there are filters for 'All', 'Market Insights', 'Trade Ideas', and 'Service'. A 'View All' dropdown and an 'Edit' link are also present. A green circle '2' highlights the 'View All' dropdown. The notification list includes 'Market Watch', 'Global Market Outlook', and 'Investment Brief'. A green circle '3' highlights the 'Edit' link. At the bottom, a detailed view of a notification shows a 'Request to update CIF Preferences' with a 'Mark as Read' button and a 'Delete' button, both highlighted with a green circle '3'.





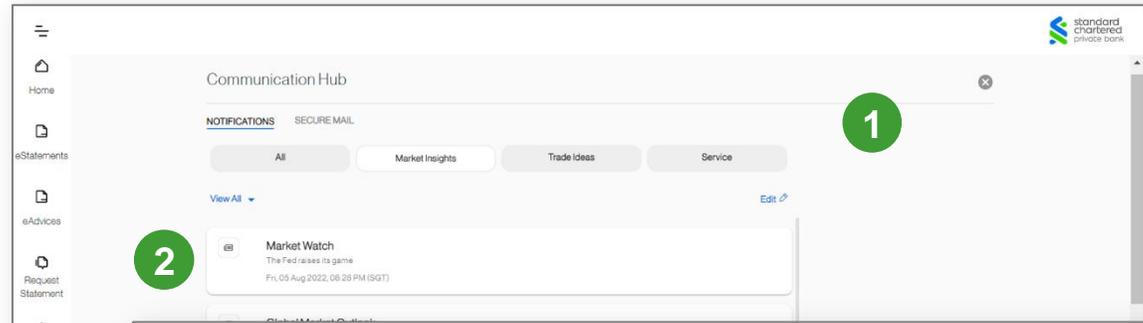
# Communication Hub

To view Market Insight publications

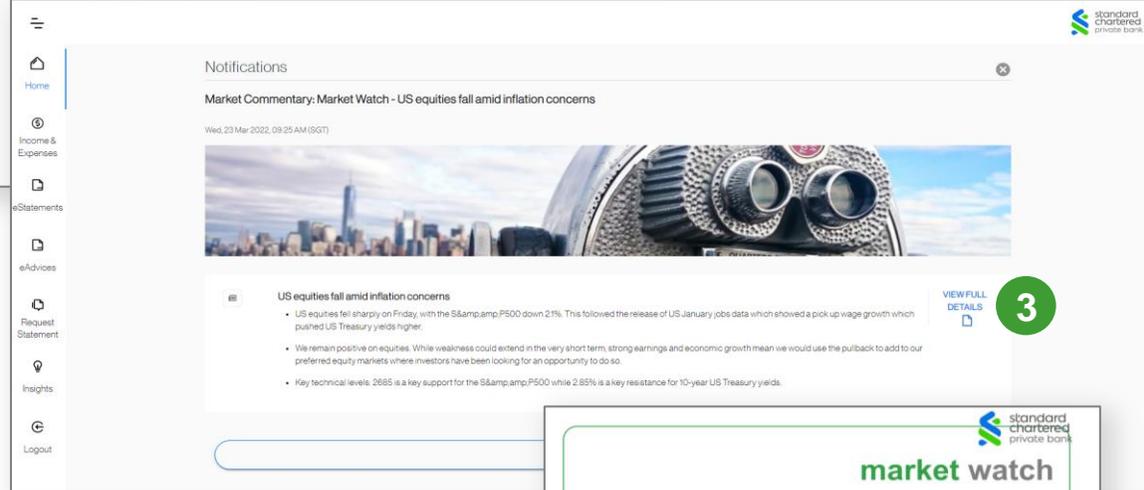
1 Notifications are grouped by categories. Click on Market Insights tab to view notifications related to market insights.

2 To read the summary, click on individual Market Insight notification.

3 For detailed report, click on View Full Details



2



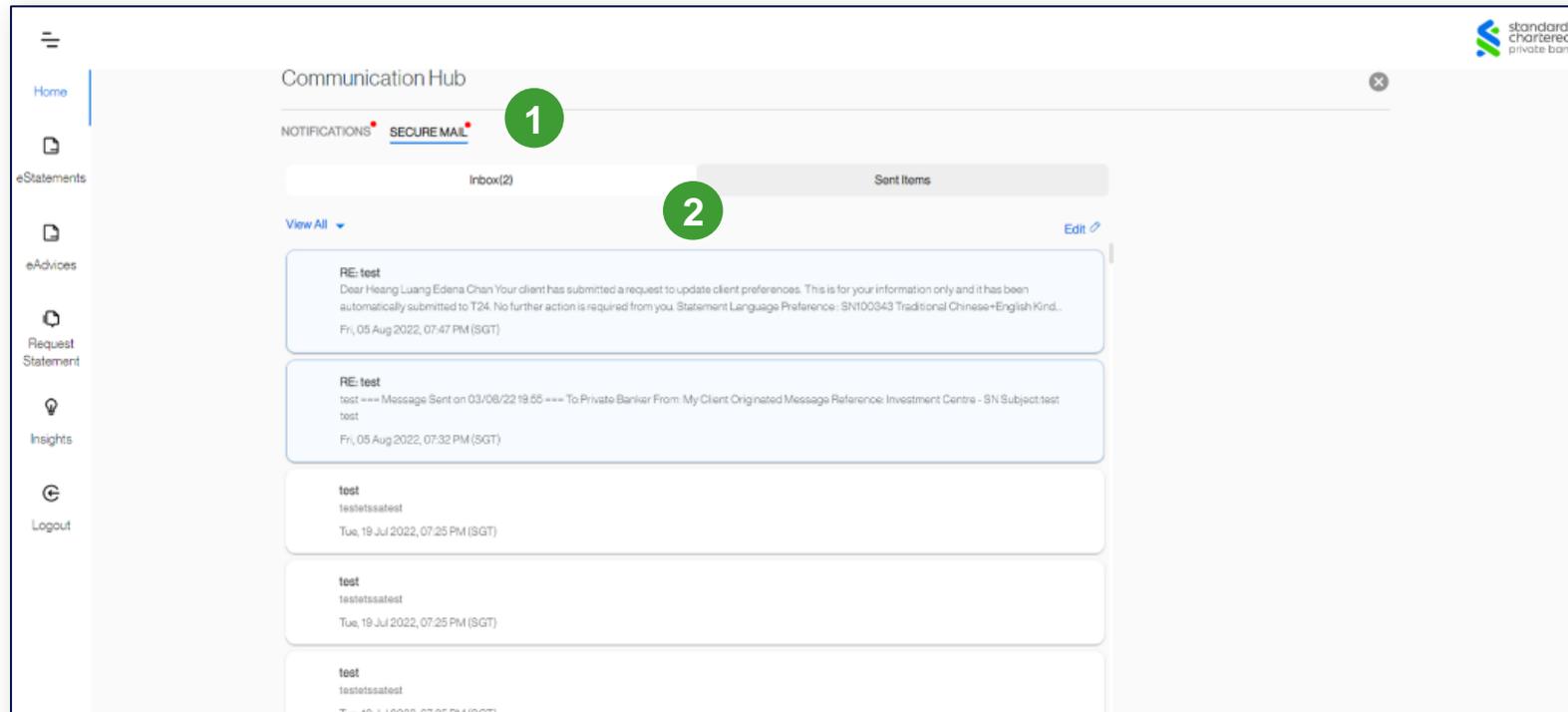
3





# Communication Hub

## Accessing Secure Mail



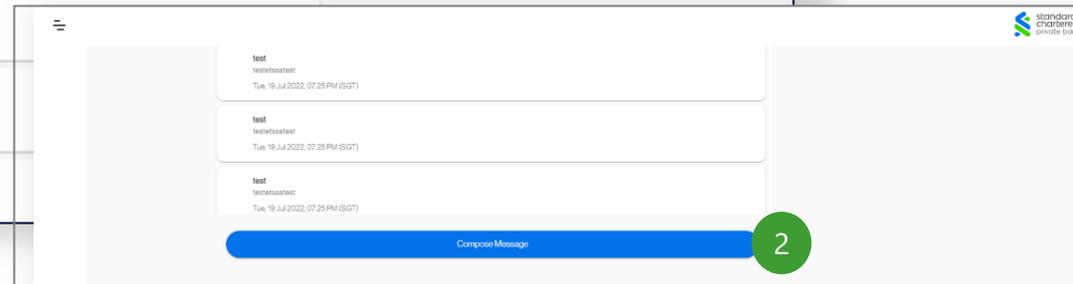
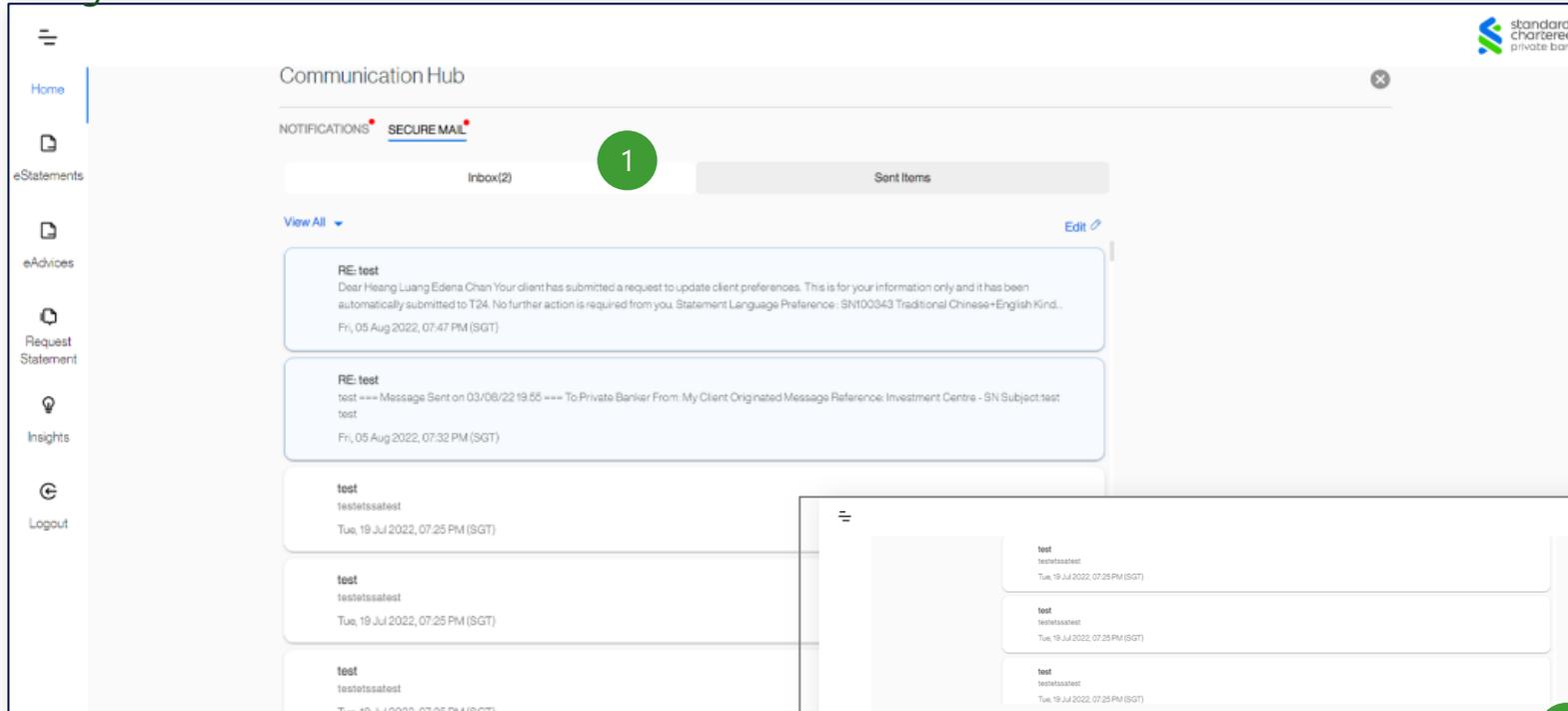
1 Select Secure Mail in Communication Hub to access all the messages in your Mailbox.

2 Switch between Inbox and Sent Items tab to view received or sent mails.



# Communication Hub

## Composing Secure Mail



- 1 Navigate to Securemail > Inbox Click here to access your mail box.
- 2 Click here to access compose an email



# Communication Hub

## Composing Secure Mail

The screenshot shows the 'Secure Mail' interface. On the left is a navigation menu with icons for Home, eStatements, eAdvices, Request Statement, Insights, and Logout. The main area is titled 'New Message' and contains the following fields:

- To:** A dropdown menu with 'SN100343 - Heang Luang Edena Chan' selected. A green circle with the number '2' is positioned to the right of this field.
- Subject:** A text field containing 'DTI publication : Need Assist from RM'.
- Message:** A text area containing 'Dear RM, Need Help to scusrripe the publication. Regards Client'. A green circle with the number '3' is positioned to the right of this area.

At the bottom of the message composition area is a large blue 'SEND' button. A green circle with the number '1' is positioned to the right of the 'Compose Message' button in the top right corner of the interface. At the bottom of the page, there is a footer with 'Global Home', 'Call our Private Banking Global Headquarters', and 'Experience our mobile app'.

- 1 After accessing the Secure Mail Inbox scroll down and click on Compose Message
- 2 On the New Message screen, click here to select your RM
- 3 Click "Send" after Subject and Message are provided

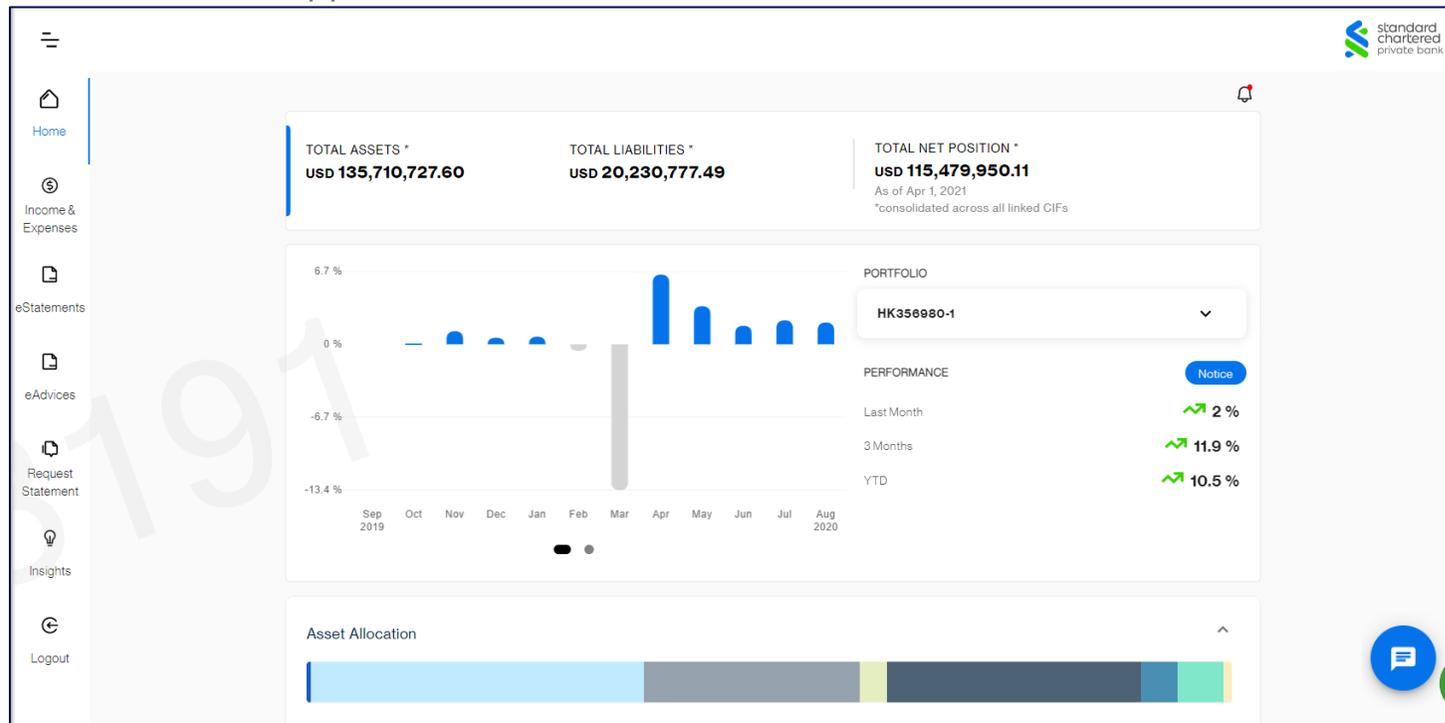
Mail sent via SC Private Bank App is fully encrypted. When you receive a new message in SC Private Bank App, an email notification will be sent to your registered external email address. When you submit a bank services request, an email notification will be sent to your SC Private Bank App mailbox and your registered external email address.



# Send Messages and Files to Your Private Banker

## Instant Messaging

The Instant Messaging and file sharing feature allows you to reach out to your Private Banker directly through SC Private Bank App in a secure and intuitive manner.



- 1 Click on the icon '  ' at any point within the SC Private Bank app
- 2 Start sending messages, discuss trade ideas and share documents with your Private Banker



# Manage Your Preferences

## Statements language selection

The screenshot displays the 'Manage Your Preferences' interface. On the left, a dark sidebar menu contains options like 'Home', 'eAdvices', 'eStatements', 'Interim Statement', 'Preferences', 'Subscriptions', 'Manage CIFs', 'Statement Language', 'Paperless', 'Manage Notifications', and 'Change Password'. The 'Statement Language' option is highlighted with a red circle containing the number '1'. The main content area is titled 'CIF Management' and shows two panels for 'Chinese eStatement option'. Each panel lists three radio button options: 'Simplified Chinese+English', 'Traditional Chinese+English' (which is selected), and 'English Only'. A green 'CONTINUE' button is located at the bottom right of the main content area.

- 1 This feature can be access via the side navigator menu under 'Preferences' > 'Statement Language'
- 2 Select your language preferences and click on 'Continue'



# Manage Your Preferences

## Add CIF

The screenshot shows the 'Manage CIFs' interface. On the left, a dark sidebar contains a navigation menu with the following items: Inbox, Logout, Your last login was 10 Aug 2022, 09:47 AM, English | 简体 | 繁体, Home, eAdvices, eStatements, Interim Statement, Preferences (highlighted), Subscriptions, Manage CIFs (highlighted), Statement Language, Paperless, Manage Notifications, and Change Password. The main content area is titled 'Manage CIFs' and displays a grid of CIF cards. A blue dashed box highlights the 'Add CIF' button, which is circled with a green '2'. The cards display the following information:

CIF Number	Net Position
SN22018	\$ 4,482,878 <sup>40</sup> USD
SN66624	\$ 6,402,410 <sup>80</sup> USD
HK33835	\$ 1,414,555 <sup>44</sup> USD
SN66625	\$ 4,482,878 <sup>40</sup> USD

- 1 This feature can be access via the side navigator menu under 'Preferences' > 'Manage CIFs'
- 2 Click on the 'Add CIF' icon. Enter your CIF number and Investment Centre



# Manage Your Preferences

## Delete CIF

The screenshot displays the 'Manage CIFs' interface. On the left, a side navigator menu is visible with a '1' in a green circle next to the menu icon. The menu items are: Home, eStatements, eAdvices, and Request Statement. The main area is titled 'Manage CIFs' and contains a grid of CIF cards. A blue dashed box highlights the 'Add CIF' button. The cards are:

- SN22018: Net Position \$ 4,482,878<sup>40</sup> USD
- SN66624: Net Position \$ 6,402,410<sup>80</sup> USD (with a '2' in a green circle next to the delete icon)
- HK33835: Net Position \$ 1,414,555<sup>44</sup> USD
- SN66625: Net Position \$ 4,482,878<sup>40</sup> USD

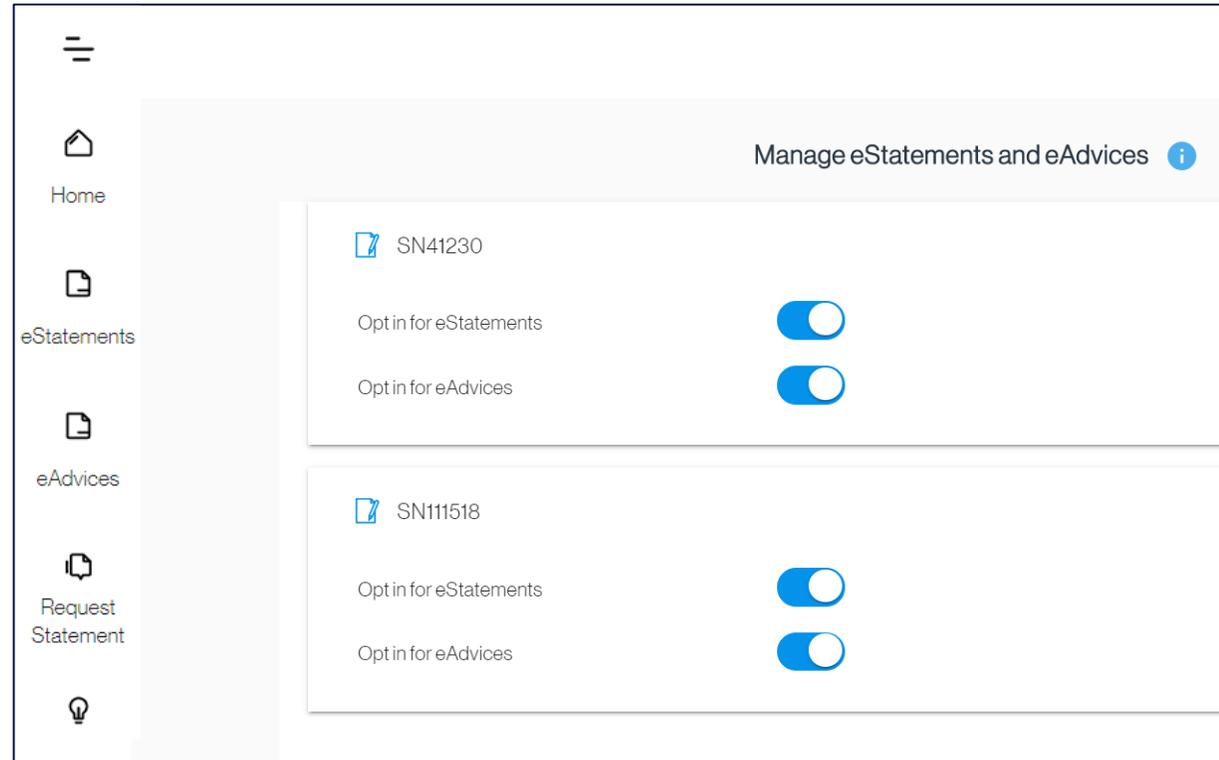
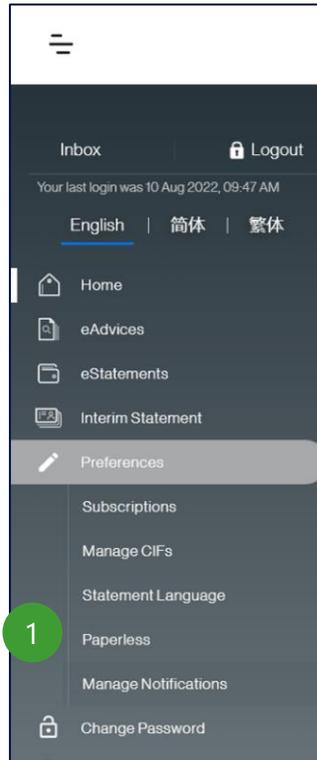
1 This feature can be access via the side navigator menu under 'Preferences' > 'Manage CIFs'

2 Select the CIF(s) accordingly and click Delete.



# Manage Your Preferences

Subscribe for electronic statements and advices



- 1 Electronic statement preferences may be access via the side navigator menu under 'Preferences' > 'Paperless'
- 2 Slide the toggle button right '  ' to Opt-in for electronic Statements or Advices. You will no longer receive hardcopies via your mailing address. Click on Continue.



# Manage Your Preferences

## Subscription for electronic statements and advices

Confirmation

Paper Subscription		
	Go Paper on Statements	Go Paper on Advices
SN115959	-	No
SN115961	-	No

**Important Information:**

**For Singapore-booked clients**

Please ensure your email address registered with us is valid, in order to receive email notifications when your e-statement or e-advice is ready. The statement, collectively "trade documents", will be provided by access through websites (the "Access Service").

Note: your e-statement and e-advice will be available in Standard Chartered Private Bank even if you do not receive an email notification.

**For UK-booked clients**

Please ensure your email address registered with us is valid, in order to receive email notifications when your e-statement is ready. The statement, collectively "trade documents", will be provided by access through websites (the "Access Service").

Note: your e-statement will be available in Standard Chartered Private Bank even if you do not receive an email notification.

**For Hong Kong-booked clients**

Please ensure your email address registered with us is valid, in order to receive email notifications when your e-statement or e-advice is ready. The statement, collectively "trade documents", will be provided by access through websites (the "Access Service").

<BACK CONFIRM

3

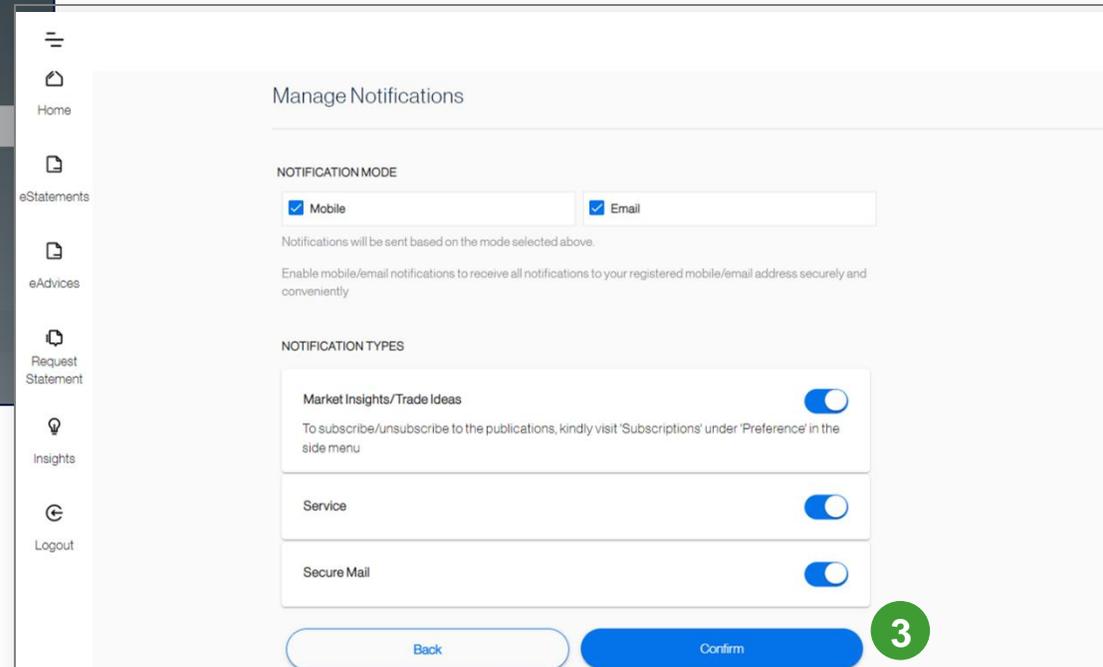
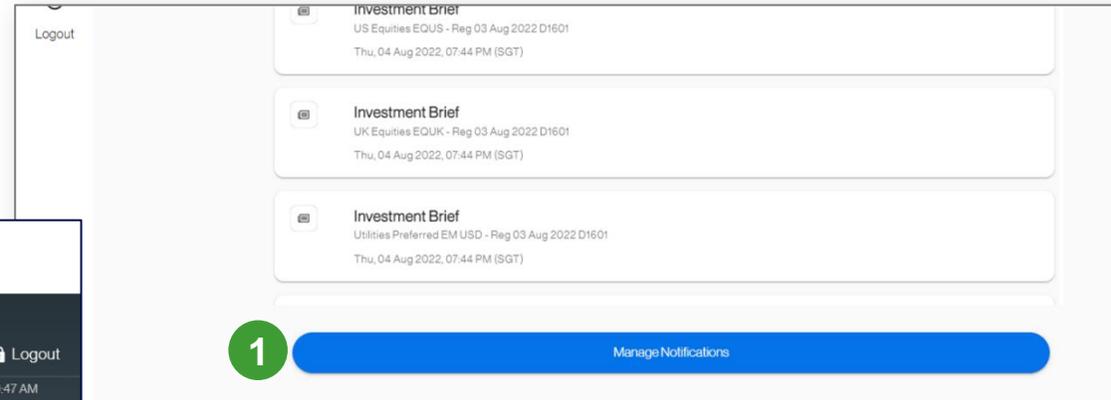
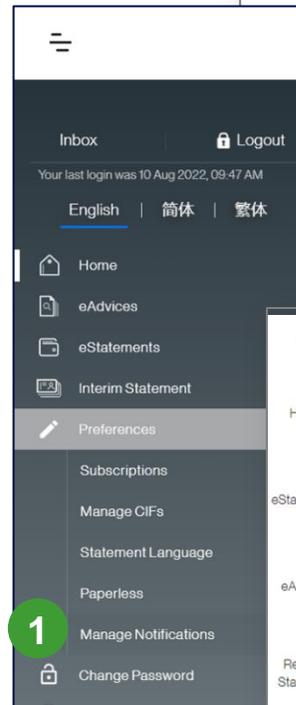
- 3 Review the changes and read the terms of use. Once verified, click confirm and OTP will be sent to your registered phone for confirmation



# Manage Your Preferences

To manage notifications

- 1 Select the Manage Notification button on the bottom of the notifications screen or from the side menu.
- 2 To set manage notification according to your customary usage, check the notification mode and toggle the notification type.
- 3 To save your settings, select the confirm button.





# Security Tips (1/2)

Advice to keep your online experience secure. Click [here](#) for Security tips.

## Login Credentials

- 1 Create a unique Username and Password.
- 2 Do not use the same password for different web site applications or services, particularly when they relate to different entities.
- 3 Your Private Banker will be able to view your portfolio information using his or her own unique Username and Password.
- 4 No Standard Chartered Bank employee should ever ask you for your Password.
- 5 Keep your Username and Password confidential and do not share them with anyone.



# Security Tips (2/2)

## Personal Data Security

- 1 Install anti-virus, anti-spyware and firewall software on your personal computer, particularly when you are linked via broadband connections, digital subscriber lines or cable modems.
- 2 Update the anti-virus and firewall products with security patches or newer versions on a regular basis.
- 3 Remove file and printer sharing on your computer, especially when you have internet access via cable modems, broadband connections or similar set-ups.
- 4 Regularly backup critical data.
- 5 Consider the use of encryption technology to protect highly sensitive data.
- 6 Do not install software or run programs of unknown origin.
- 7 Never disclose your personal information (e.g. information on identity card or passport, addresses, or bank accounts) to any persons failing to prove their identities or any doubtful Web sites. You should never disclose your passwords to anyone.
- 8 Do not access e-banking services through public or shared computers (e.g. at cyber cafés or public libraries).
- 9 Log off the online session and turn off the computer when not in use.



# SC PRIVATE BANK APP

USER GUIDE