



# A STEP-BY-STEP GUIDE TO INVEST IN UNIT TRUST VIA CIMB Clicks



## ► Unit Trust Account Opening

### STEP 1

- Log in to your Clicks account and click on **'Apply & Invest'** on the left panel menu.
- On the Unit Trust tile, click on **"Apply"**.

a.►

**CIMB Clicks**

Please enter your login credentials

I want to  
View My Dashboard

User ID  
Enter User ID

*CIMB Clicks ID is mandatory*

Login

Register Handy Tips

[Forgot User ID or Password?](#)

b.►

FORWARD Banking

My Dashboard  
My Accounts  
Pay & Transfer  
Top Up  
**Apply & Invest**  
Rewards  
Services  
Handy Tips

### Investments

Unit Trust ASN

Apply Subscribe

CIMB CASH PLUS PERSONAL LOAN  
**We got your back with up to RM1,000**  
Campaign period: 10 February to 31 May 2020  
FORWARD Your Life  
\*Terms and Conditions apply.



# A STEP-BY-STEP GUIDE TO INVEST IN UNIT TRUST VIA CIMB *Clicks*



## ► Unit Trust Account Opening

### STEP 2

You will be prompted to fill up Investment Suitability Assessment.

a. Answer all the questions to complete your **Risk Profiling**.

a.►

**Investor Suitability Assessment / Risk Profiling**

Read more on [Investor Suitability Assessment / Risk Profiling](#)

**Your Personal Details**

Name

Enter Email Address

Enter Mobile Number

**Choose statements that best describe you**

**Your current age:**

18 - 35

36 - 45

46 - 60

61 - 74

75 and above



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## ► Unit Trust Account Opening

### STEP 2

You will be prompted to fill up Investment Suitability Assessment.

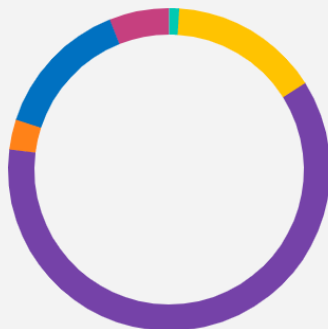
b. Your Risk Profile will be displayed along with the recommended funds.

b.►

### Your Risk Profile & Model Portfolio

Your suggested portfolio is:

#### Conservative



1% Alternative

15% Cash

61% Fixed Income

3% Global Equity

14% Local Equity

6% Regional Equity

### Recommended Products

Desired Investment Amount  
MYR 1000

Calculate

Note: Minimum initial investment & minimum subsequent investment in unit trust differs from fund to fund. Please refer to the Prospectus for further information.

Asset Class	Proposed (%)	Investment Amount (RM)	Recommended Product Name	Ranking	More Information	Action
Alternative	1	10.00				
Cash	15	150.00	CIMB-PRINCIPAL DEPOSIT FUND	NA	<a href="#">Link to Prospectus</a>	NA
			CIMB ISLAMIC MONEY MARKET FUND	NA	<a href="#">Link to Prospectus</a>	NA
Fixed Income	61	610.00	CIMB ISLAMIC SUKUK FUND	NA	<a href="#">Link to Prospectus</a>	NA
			AFFIN HWANG SELECT BOND FUND - RM CLASS	NA	<a href="#">Link to Prospectus</a>	NA
Global Equity	3	30.00				



# A STEP-BY-STEP GUIDE TO INVEST IN UNIT TRUST VIA CIMB Clicks



## ► Unit Trust Account Opening

**STEP**  
**3**

- a. Proceed to fill in your **personal details**.
- b. Request and enter the TAC sent to your mobile number registered with CIMB to confirm your account.

a.►

**Unit Trust Account Opening**

Your Current Risk Profile  
**Conservative** For more information, please [click here](#)

**1 Personal Details**

Select Title

Full Name

ID Number

Date Of Birth

**2 Address**

Address (Line 1)

b.►

Hi,  
Last Login 04 Mar 2020 10:20:37 am

**CIMB Clicks** Mailbox Logout

**Unit Trust Account Opening Confirmation**

**Personal Details**

Title **MS** Date of Birth

Full Name Risk Tolerance Type

ID Number

**Address**

Address Line 1 Post Code

Address Line 2 State

Address Line 3 Country

Address Line 4



# A STEP-BY-STEP GUIDE TO INVEST IN UNIT TRUST VIA CIMB *Clicks*



## ► Purchase of Unit Trust

**STEP**  
**1**

Select 'Purchase' from the dropdown menu ('...') in the Unit Trust tile.

The screenshot displays the CIMB Clicks mobile application interface. On the left is a dark sidebar menu with the following items: My Dashboard, My Accounts, Pay & Transfer, Top Up, **Apply & Invest** (highlighted in red), Rewards, Services, and Handy Tips. The main content area is titled 'Investments' and features two tiles: 'Unit Trust' and 'ASNB'. The 'Unit Trust' tile has a red 'Apply' button and a three-dot menu icon. A dropdown menu is open from this icon, listing options: Purchase (circled in red), Redemption, Switching, Funds Pricing, Status Enquiry, and View/Download eStatement. Below the tiles, there is a promotional banner for 'CIMB CASH PLUS PERSONAL #MakeItHappen' with the text 'Apply online to get up to R... FORWARD ► Your Dream' and a note '\*Terms and Conditions apply.'



# A STEP-BY-STEP GUIDE TO INVEST IN UNIT TRUST VIA CIMB Clicks



## ► Purchase of Unit Trust

### STEP 2

a. Select **Unit Trust Account** > Select **Fund Manager** > Select **Fund Name**

b. Then, key in the amount you wish to invest.

a.►

FORWARD Banking

Hi,  
Last Login 04 Mar 2020 10:20:37 am

CIMB Clicks

Mailbox Logout

### Unit Trust Account Purchase

Your Current Risk Profile  
**Conservative** For more information, please [click here](#)

#### 1 Unit Trust Account Details

Name

Select Unit Trust Account Number

#### 2 To

Select Fund Manager

Fund Manager  
CIMB WEALTH ADVISORS

Fund Name  
CIMB-PRINCIPAL KLCI-LINKED FUND

#### 3 Amount

Minimum Initial Subscription Amount  
RM 500.00

Minimum Subsequent Subscription Amount  
RM 200.00

MYR Enter Amount

Enter Mobile Number  
This field is required.

b.►

FORWARD Banking

Hi,  
Last Login 04 Mar 2020 10:20:37 am

CIMB Clicks

Mailbox Logout

### Unit Trust Account Purchase

Your Current Risk Profile  
**Conservative** For more information, please [click here](#)

#### 1 Unit Trust Account Details

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#### 3 Amount

Minimum Initial Subscription Amount  
RM 500.00

Minimum Subsequent Subscription Amount  
RM 200.00

MYR Enter Amount

Enter Mobile Number  
This field is required.



# A STEP-BY-STEP GUIDE TO INVEST IN UNIT TRUST VIA CIMB Clicks



## ► Purchase of Unit Trust

**STEP**  
**3**

You will be directed to Unit Trust confirmation page with the indication of **sales charge** and **investment amount**.

Request and enter the TAC to complete the transaction.

The screenshot displays the CIMB Clicks website interface. The browser address bar shows 'cimbclicks.com.my/clicks/#/'. The page title is 'Unit Trust Purchase Confirmation'. The user is logged in as 'Hi, Last Login 21 Apr 2020 03:11:37 pm'. The page is divided into several sections:

- Unit Trust Account Details:**

	Amount
Unit Trust Account Number	Minimum Initial Subscription Amount <b>RM 1,000.00</b>
Settlement Account	Minimum Subsequent Subscription Amount <b>RM 100.00</b>
	Sales Charges (R%) <b>0</b>
	Charges (R%) <b>0.00</b>
	Net Investment <b>RM 1,000.00</b>
- To:**
  - Fund Manager
  - Fund Purchased
  - Closing Date
- Other Details:**
  - Mobile No

At the bottom right, the total amount is displayed as **RM 4,000.00**.



# A STEP-BY-STEP GUIDE TO INVEST IN UNIT TRUST VIA CIMB Clicks



Should you want to check the **status of your investment**, click on the **“Status Enquiry”** from the dropdown menu (‘...’) in the Unit Trust tile.

