



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



## ► Unit Trust Account Opening

### STEP 1

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

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

Invest

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.

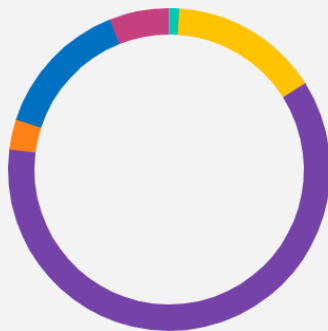
b. Your Risk Profile will be displayed along with the recommended funds.

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. Approve the SecureTAC via CIMB Octo 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.

**Unit Trust Account Opening Confirmation**

**Personal Details**

Title: MS, Date of Birth: [Redacted]

Full Name: [Redacted], Risk Tolerance Type: [Redacted]

ID Number: [Redacted]

**Address**

Address Line 1: [Redacted], Post Code: [Redacted]

Address Line 2: [Redacted], State: [Redacted]

Address Line 3: [Redacted], Country: [Redacted]

c.

**SecureTAC Approval:**  
Do not close or refresh. Transaction will expire in 32 seconds.

**How to approve transaction with SecureTAC:**

**Via Push Notification:**

- 1) Tap on the push notification on your **CFM1948**
- 2) Tap "Approve"

**OR via CIMB OCTO App menu:**

- 1) Open CIMB OCTO App
- 2) Tap "SecureTAC Approval"
- 3) Tap "Approve"

**For seamless approval, enable push notifications to receive SecureTAC:**

- iOS: Go to Settings > Notifications > CIMB OCTO MY > Turn on Allow Notifications
- Android: Go to Settings > Notifications > App Notifications > CIMB OCTO MY > Allow Notifications
- Huawei: Go to Settings > Notifications > Manage All > CIMB OCTO MY > Allow Notifications



# 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.

**FORWARD** Banking

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

### Investments

Unit Trust	ASNB
<b>Invest</b>	<b>Subscribe</b>

...  
Purchase  
Redemption  
Switching  
Funds Pricing  
Status Enquiry  
View/Download eStatement

CIMB CASH PLUS PERSONAL  
**#MakeItHappen**  
Apply online to get up to R  
**FORWARD** Your Dream  
\*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

b.►

FORWARD Banking

#### 2 To

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.



# 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**.

Approve the SecureTAC via CIMB Octo to complete the transaction.

The screenshot shows the CIMB Clicks website interface. The left sidebar contains navigation options: My Dashboard, My Accounts, Pay & Transfer, Top Up, Apply & Invest (highlighted), Rewards, Services, and Handy Tips. The main content area is titled "Unit Trust Purchase Confirmation". It displays "Unit Trust Account Details" with fields for Unit Trust Account Number, Settlement Account, and Amount. The Amount section lists: Minimum Initial Subscription Amount RM 1,000.00, Minimum Subsequent Subscription Amount RM 100.00, Sales Charges (%) 0, Charges (RM) RM 0.00, and Net Investment RM 1,000.00. Below this is the "To" section with fields for Fund Manager, Fund Purchased, and Closing Date. The "Other Details" section shows the Mobile No. field. At the bottom, a "Total Payable" of RM 1,000.00 is visible.

The screenshot shows the SecureTAC Approval page. At the top, it says "SecureTAC Approval: Do not close or refresh. Transaction will expire in 32 seconds." Below this, it provides instructions on "How to approve transaction with SecureTAC". The instructions are divided into two methods: "Via Push Notification" and "Via CIMB OCTO App menu". The "Via Push Notification" method includes steps: 1) Tap on the push notification on your CPH1968, 2) Tap 'Approve!'. The "Via CIMB OCTO App menu" method includes steps: 1) Open CIMB OCTO App, 2) Tap 'SecureTAC Approval', 3) Tap 'Approve!'. A section titled "For seamless approval, enable push notifications to receive SecureTAC:" lists instructions for iOS, Android, and Huawei. An image of a smartphone displaying the CIMB OCTO app interface is shown on the right. The bottom of the page contains a copyright notice: "All rights reserved. Copyright © 2024 CIMB Bank Berhad 197201001799 (13491-R)".



# 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.

