

FAQ – Wealth Dashboard

1. What is Wealth Dashboard?

HSBC's Wealth Dashboard is a holistic online wealth platform with a simple-to-use user interface. It gives you a unified overview of your investment holdings, performance tracking and analysis, transactions history and market news and insights.

2. How do I access Wealth Dashboard?

HSBC's Wealth Dashboard is only made available for personal banking customers. It can be accessible through the link below once you have logged on to your Personal Internet Banking ("PIB").

HSBC

Personal Banking | Credit Cards | Debit Cards | Property Financing | Investments | Insurance | Digital Banking | Personal Financing | Deposits | Services | Latest Promotions | Smartform | online@hsbc

Welcome | You are logged on to online@hsbc | LOG OFF

Apply for products | Retrieve Application | Accounts | Account Summary | Net Worth Statement | Open New Account | Open New Term Deposit-i | Open New Time Deposit | Open New Foreign Currency Time Deposit | Update Maturity Instruction | Statements and Advices | Pay Bills | Transfers | Insurance | Investment | **Wealth Dashboard** | Rates Inquiry | Services | Transaction Rewards | Contact centre | Log Off

You have 1 new message Print

Global View and Global Transfers* allow you to access all your HSBC accounts around the world all on one screen, and transfer funds between them. [Find out more >](#)

Account Summary

Click on an underlined account number to view your account.

Account number	Type	Ccy	Balance*
	Advance E-Chequeing Account	MYR	9,489.70

*denotes ledger balance

Account number	Type/Maturity date	Ccy	Balance
	Time Deposits	MYR	10,000.00

Redeem your Reward Points now!

3. How do I navigate back to the PIB summary page from Wealth Dashboard?

Click on "Internet Banking", which resides at the master header, on the top of the webpage. Once clicked, you will be directed back to the PIB Summary page.

HSBC | **Internet banking** | My Portfolio (Holdings and performance) | Markets (News and insight)

Current holdings

My Portfolio | My Watchlists | Analyse and Compare | Realised Gain/Loss | Transactions

Current holdings | Account summary

4. What browser and operating system can support Wealth Dashboard?

HSBC's Wealth Dashboard is compatible with the operating system and browser below

Operating system	Browser
Windows 7 and above	Internet Explorer Firefox Google Chrome
Macintosh (OSX 10 and above)	Safari

5. What functions does the Wealth Dashboard offer?

In summary, Wealth Dashboard offers you the following functionalities

Function	Descriptions
Portfolio view	Allows you to view your current investment account and holdings (Unit Trust Funds, Structured Investments including Dual Currency Investment, Bonds/Sukuk, Investment Linked Insurance and Non-Investment Linked Insurance)
Market News and Insights	These are tailored insights to the market pertaining to your investment holdings. It channels aggregated news and information from Thomson Reuters that is relevant to your investment portfolio.
Analyse and Compare	Asset Allocation breaks down your investment holdings to provide an in-depth view by its underlying assets, sector, region and product type.
Top Holdings	Provide an interactive graphical summary of the market fluctuations over time of your investments with the ability to compare a variety of market benchmarks.
Watchlist	Allows you to create watchlist and track performance on selected unit trust funds, bonds/sukuk and indices.
Quick Quote	Allows you to get information on Unit Trust fund's price and FX rate.

6. Does Wealth Dashboard refresh with the latest data when I click on the "Refresh" button?

There is a delay in some instances as the underlying system is not refreshed immediately from the source system. Please refer to the sources and disclaimer at the bottom of the Wealth Dashboard page for details.

7. I cannot see my investment account in both PIB and Wealth Dashboard. Why is that so?

The investment account is likely not linked. This typically happens when you open the investment account after the initial savings or current account opening and did not request for PIB linkage. To link up, log into PIB and click on <Services> --> Select Accounts and check the box for the particular investment account.

HSBC

Personal Banking | Credit Cards | Debit Cards | Property Financing | Investments | Insurance | Digital Banking | Personal Financing | Deposits | Services | Latest Promotions | HSBC Safeguard | Smartform | online@hsbc

Welcome | You are logged on to online@hsbc. LOG OFF

HSBC You have 2 new messages [Print](#)

Go to Global View

Services

- Update Personal Information
- Update Correspondence Addresses
- Change Internet Banking Password
- Change Secondary Password
- Change security question and answer
- Request Replacement Telebanking PIN
- Order Cheque Book
- Stop Cheque
- Select Accounts
- Rename Accounts
- Change Limits

Select Accounts

Account number	Type	Ccy	Selection
	Advance E-Chequeing Account	MYR	<input checked="" type="checkbox"/>
	HomeSmart	MYR	<input checked="" type="checkbox"/>
	Visa Signature	MYR	<input checked="" type="checkbox"/>

Select

8. What are the type of investment holdings available in Wealth Dashboard?

Investment products available are unit trust funds, bonds, structured investments, dual currency investment and investment-linked insurance.

9. How often are the market values or prices updated?

Different products have different market frequency update as below

- >> Unit Trust Funds: Daily
- >> Bonds (Local and Overseas): Daily
- >> Structured Investments: Weekly
- >> Deposits: Daily

However, updates are further subject to batch runs and in some instances, the prices reflected are few days delayed. Please refer to the sources and disclaimer at the bottom of the Wealth Dashboard page for details.

10. How is Unrealised Capital Gain/Loss calculated?

Unrealised Capital Gain/Loss is calculated as the difference between the current Market Value and the Book Cost.

11. Will I be able to transact based on the market value or price shown in Wealth Dashboard?

All market value or price in Wealth Dashboard are indicative and should only be used as an indication of the market value for your investment holdings. Transacting in a particular wealth product would have associated transaction costs which are specific to each product. You are advised to refer back to the corresponding product literature for details, or speak to our Relationship Manager for more information.

12. Does the figure under the Unrealised capital gain/ loss reflects the exact settlement amount that I will receive after redemption or a sale?

Unrealised Gain/Loss displays the indicative value that you will receive in the event of a redemption or sale. It doesn't factor in exchange rates and associated cost charged during actual settlement. You are advised to refer back to the corresponding product literature for details, or speak to our Relationship Manager for more information.

13. How is the unit trust income distribution (dividend) recorded in both Realised and Unrealised capital gain or loss?

Unit trust dividend is not recorded in the Realised gain/loss because no cash is received and settled. However, unit trust dividend is recorded under the Unrealised capital gain (Gain = Current Market Value X units received) in My Portfolio>>Current Holdings.

14. Can I view my joint investment or deposits account in Wealth Dashboard?

Yes. However only joint account with either-to-sign mandate will be displayed. Joint accounts that require all-to-sign mandate will not be displayed.

15. I am unable to view the transactions details for my savings or current accounts in Wealth Dashboard. Should I be concerned?

No, you should not be concerned.

Wealth Dashboard displays only the latest total amount in your savings and current deposit accounts. To view those account transactions details, you will need to go to the Personal Internet Banking page.

16. Will I be able to view the history of my investment transaction(s) in Wealth Dashboard?

You can view your investment transaction details dating back to a maximum of 2 years from current date. If you need further analysis on your investment portfolio, please contact our Relationship Manager.