FSMOne step-by-step guide

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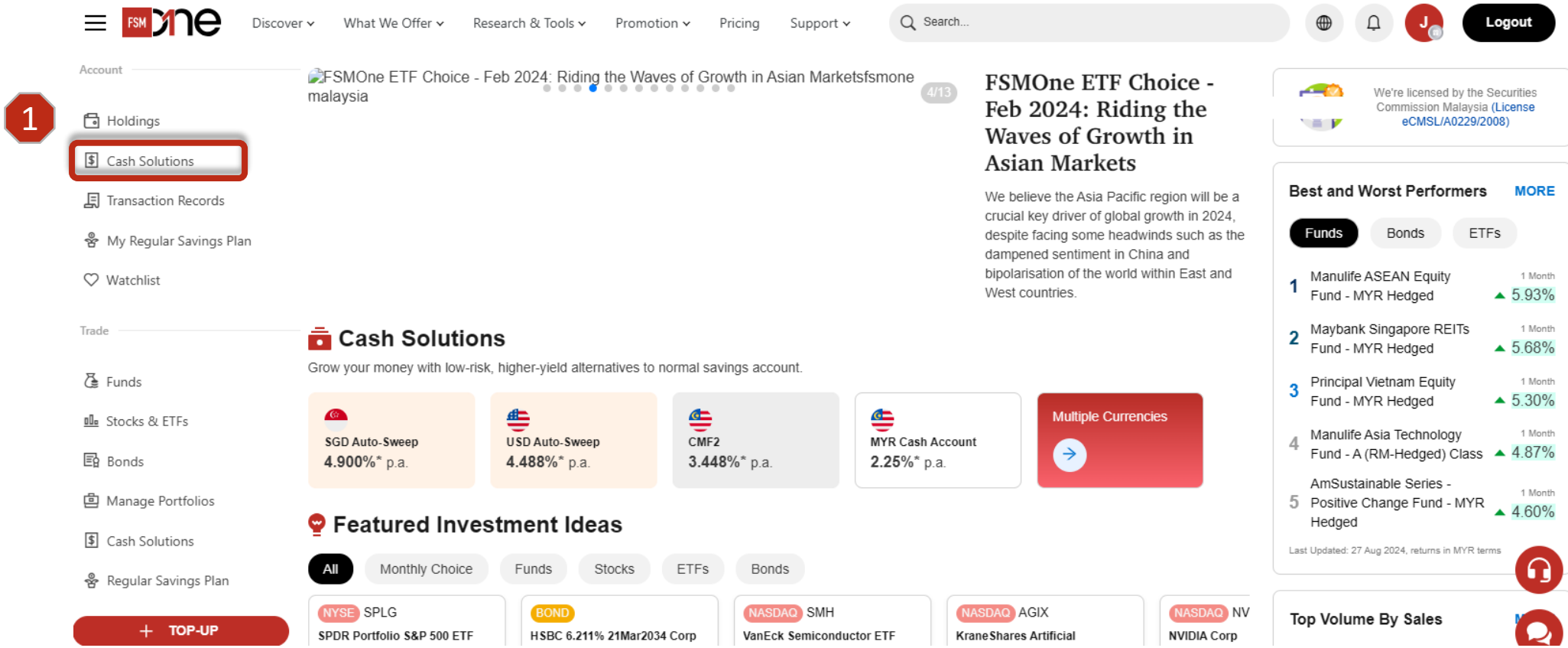
FSMOne step-by-step guide

Cash Account

Cash Account top up on FSMOne

Step 1

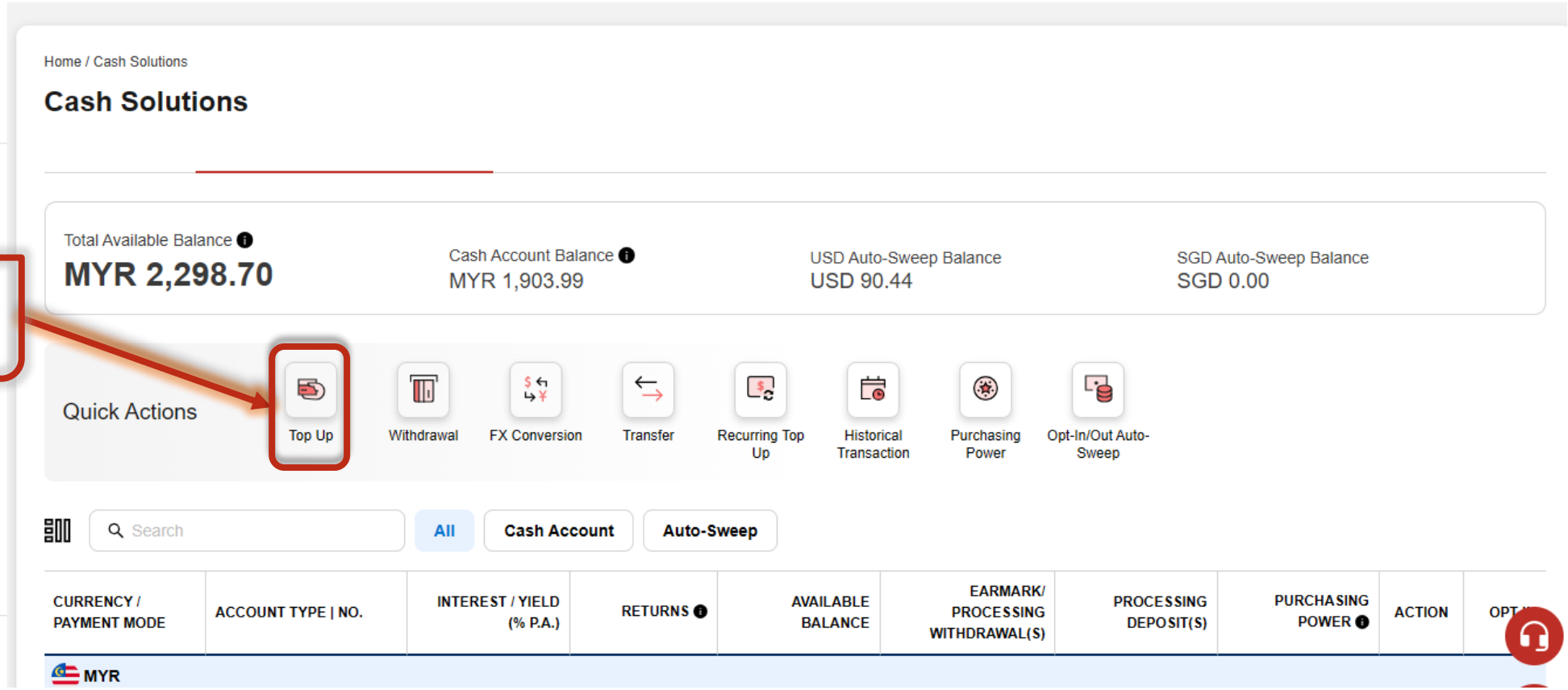
- **Click on [Cash Solution]**



Cash Account top up on FSMOne

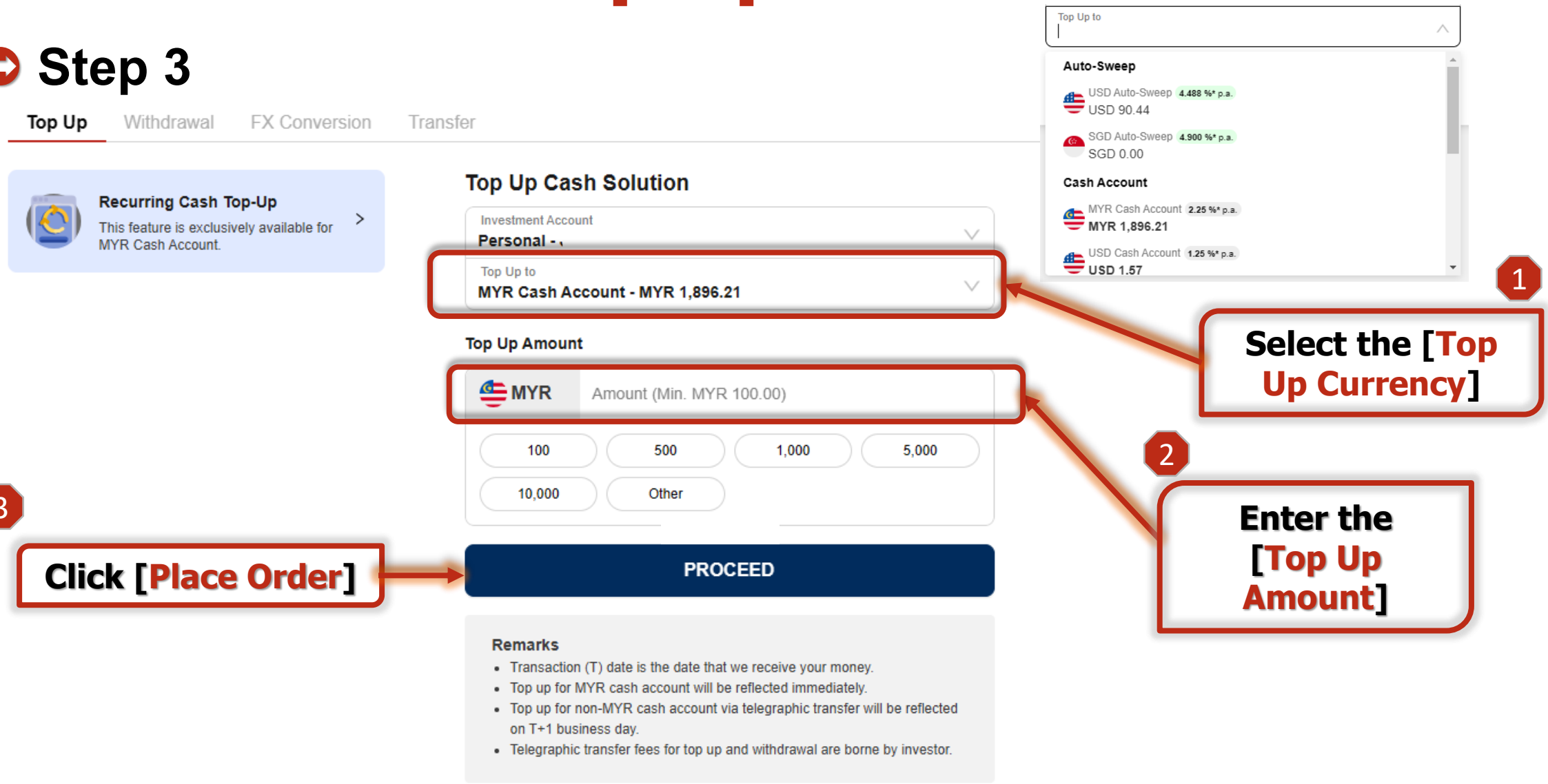
Step 2

Click on [Top Up]



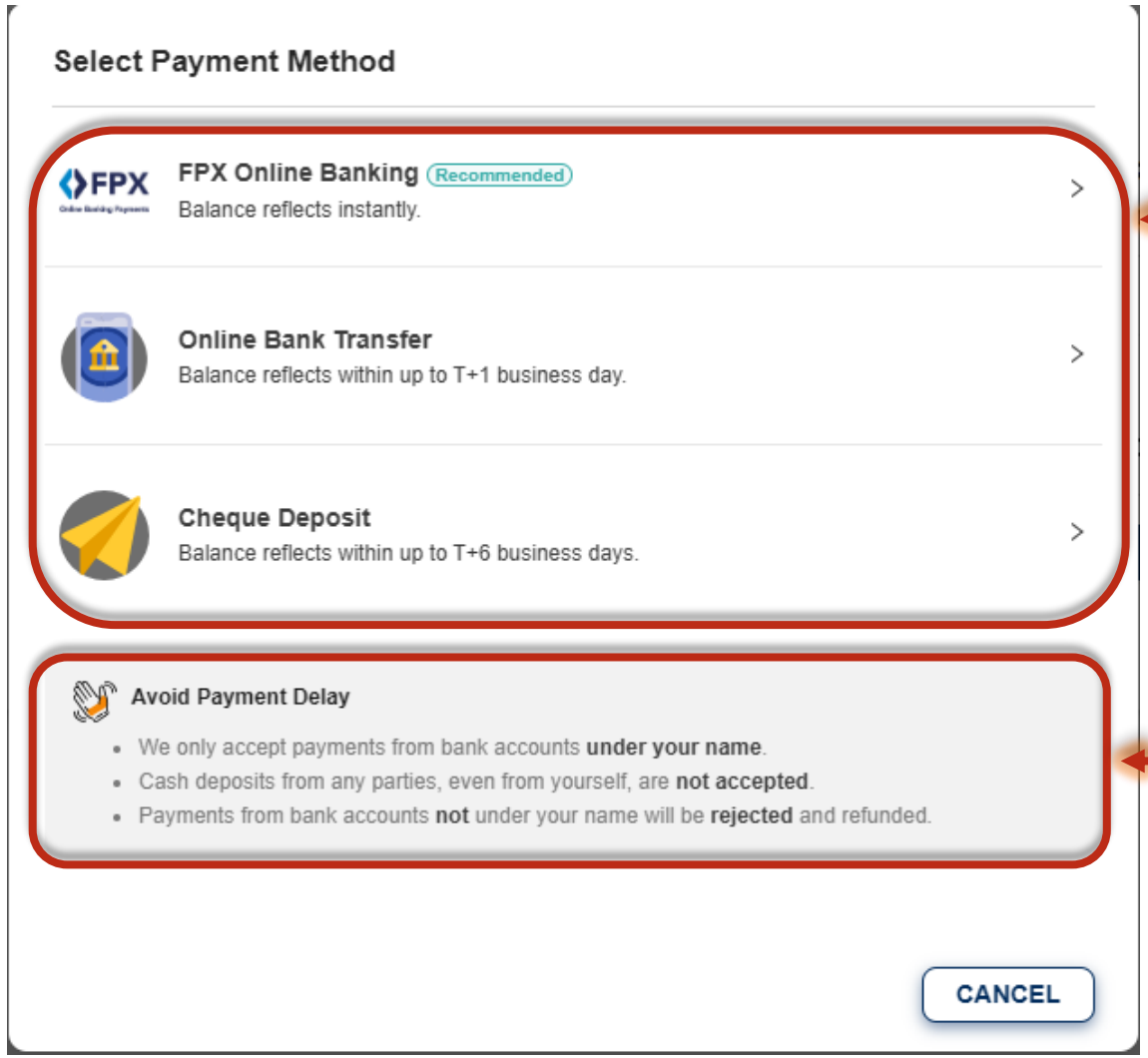
Cash Account top up on FSMOne

Step 3



Cash Account top up on FSMOne

- **Step 4**



Select [payment method]

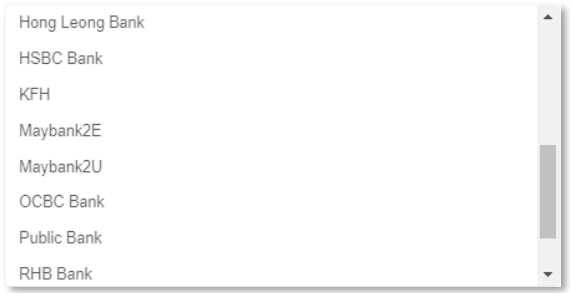
Take note important note

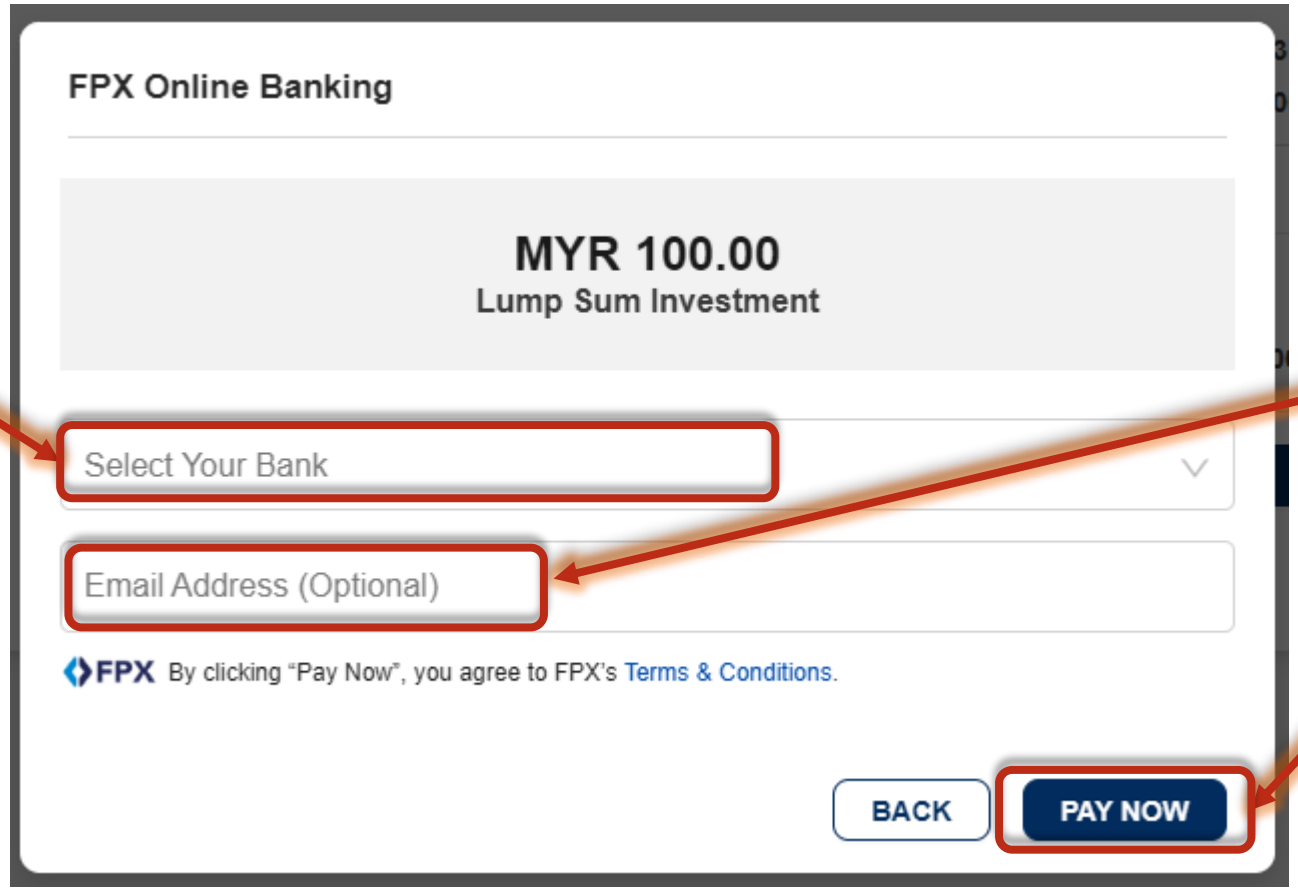
Cash Account top up on FSMOne

➲ Step 5

1

Select your preferred bank





2

Enter your Email Address
Optional

3

Click [Pay Now]

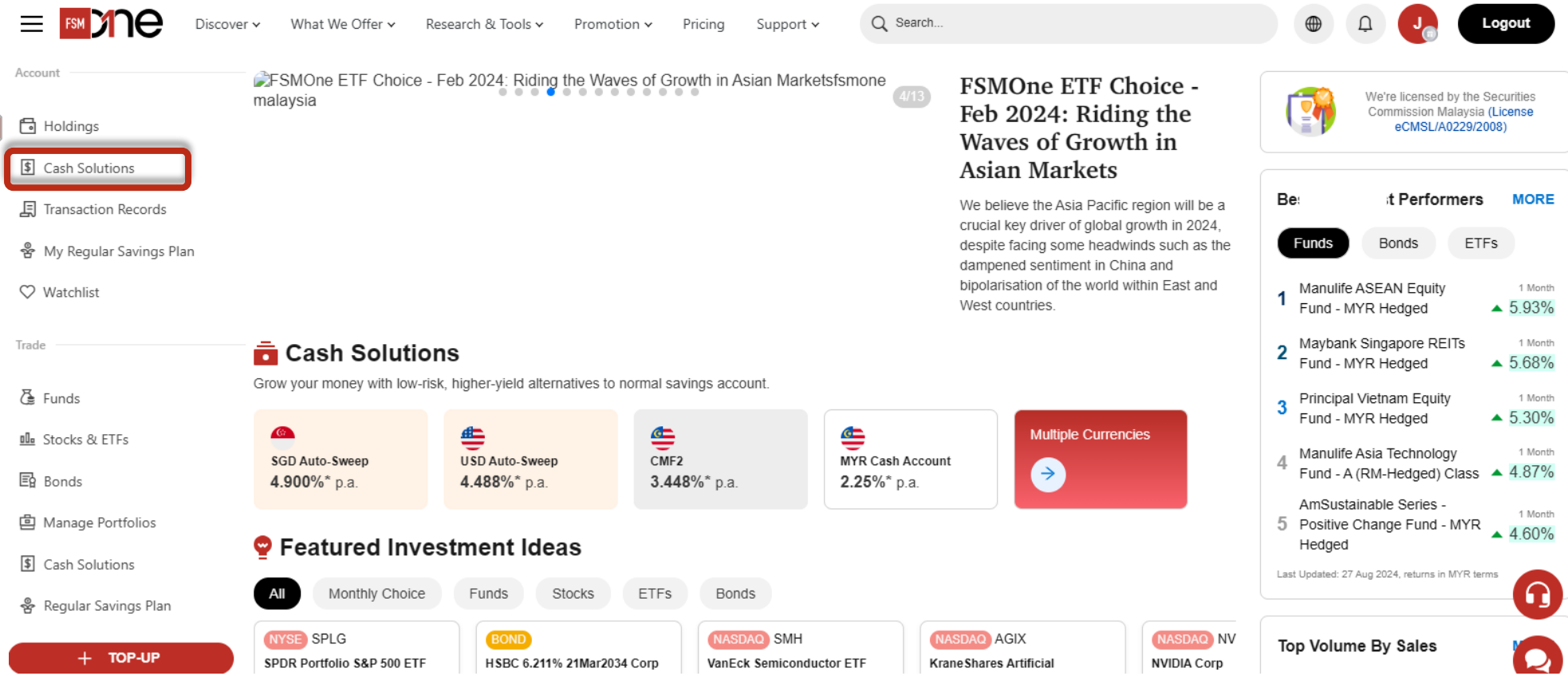
FSMOne step by step guide

Cash Account - RSP

Cash Account RSP set up on FSMOne

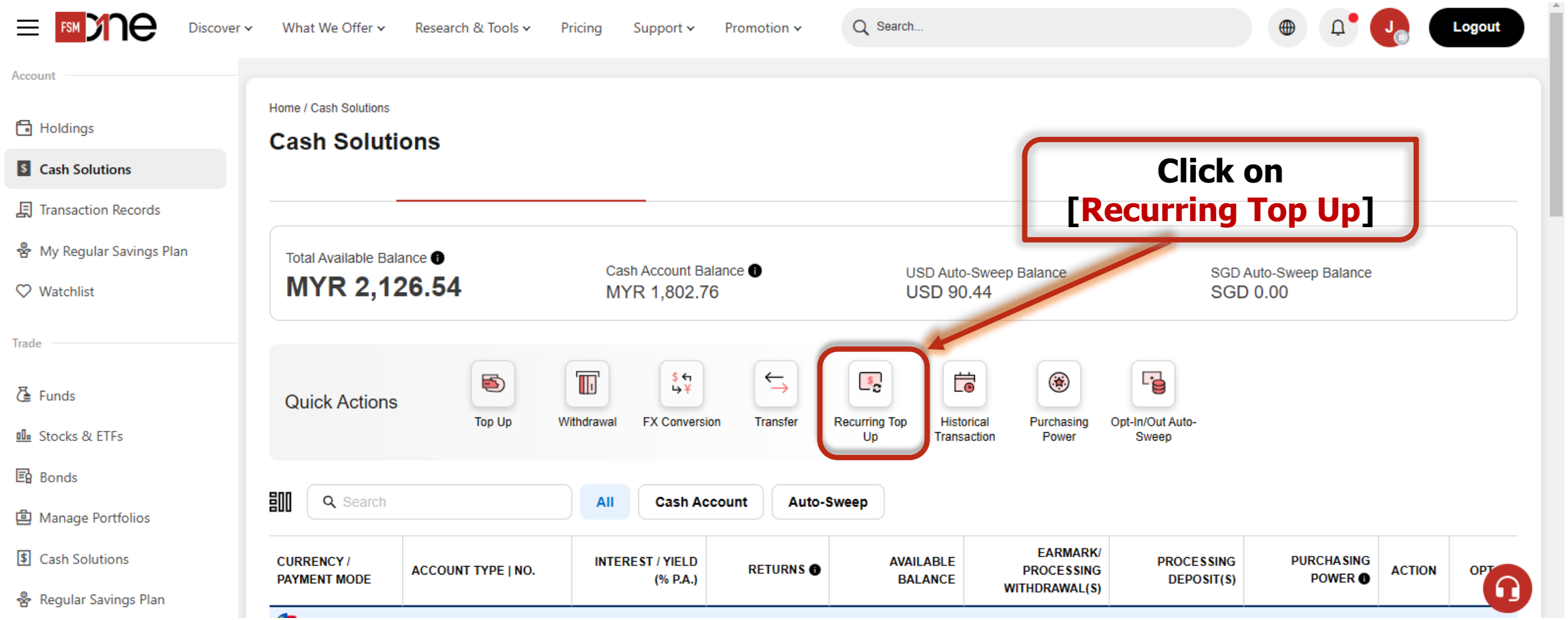
➲ Step 1

- **Click on [Cash Solution]**



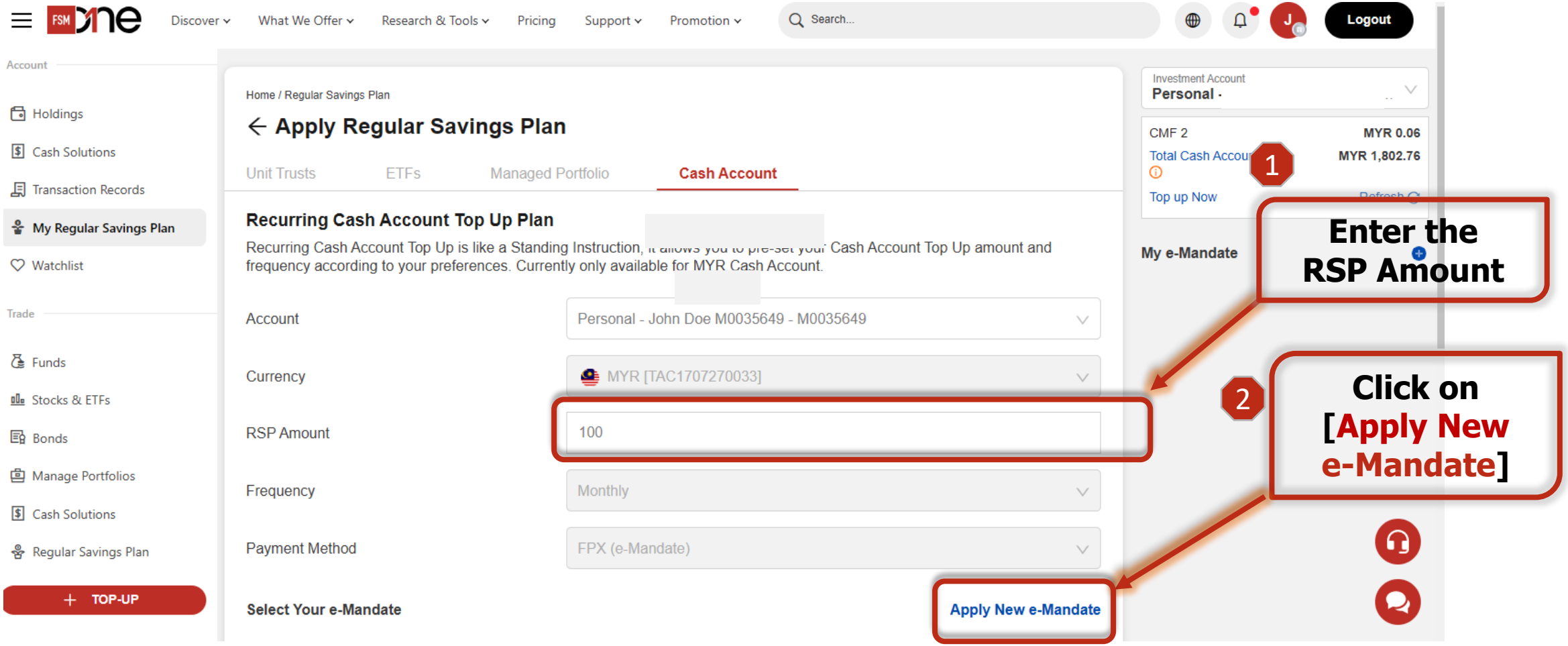
Cash Account RSP set up on FSMOne

Step 2



Cash Account RSP set up on FSMOne

Step 3



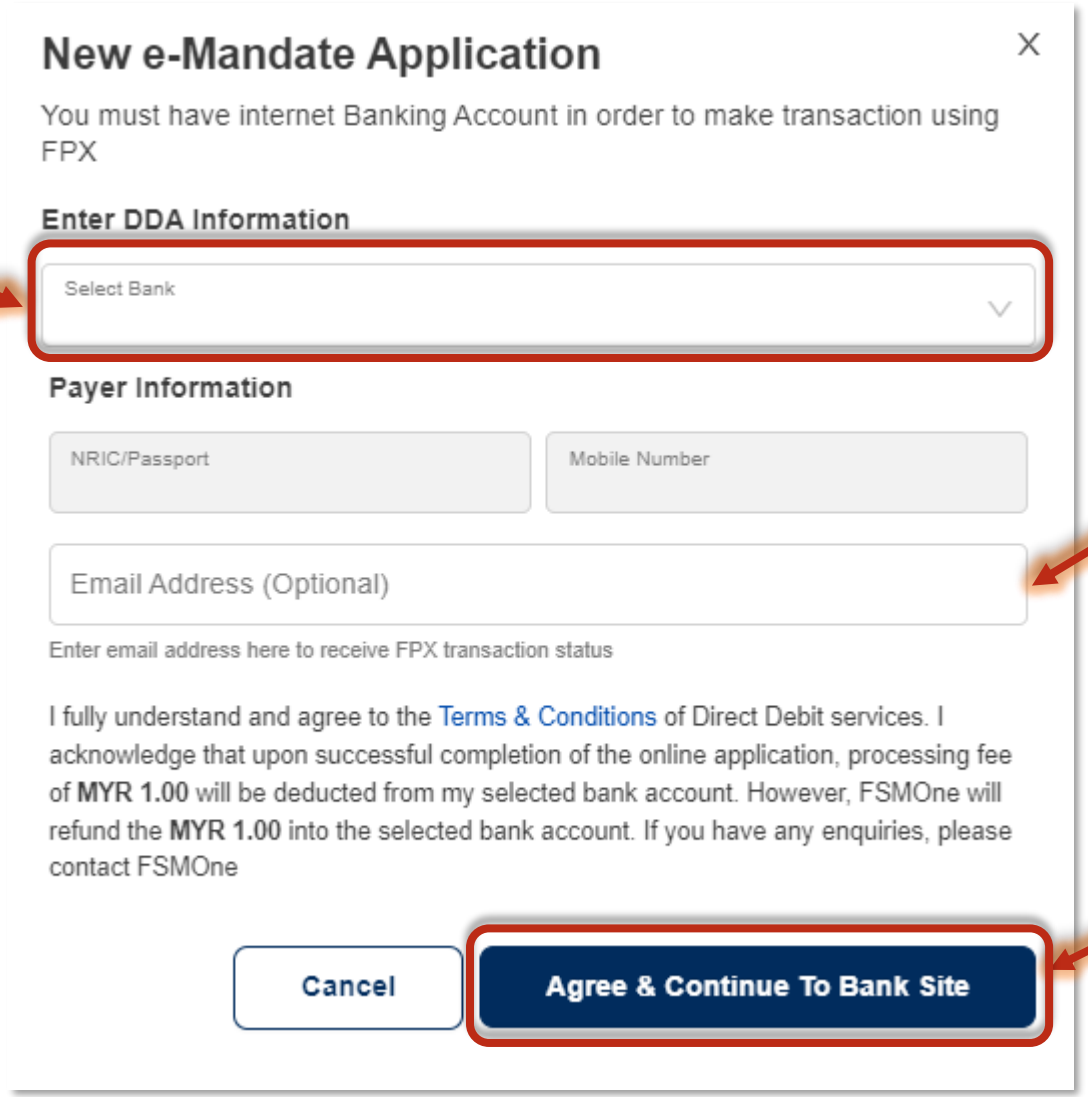
Cash Account RSP set up on FSMOne

➲ Step 4

1

Select Preferred Bank





2

Enter Email Address **Optional*

3

Click [Agree & Continue To Bank Site]

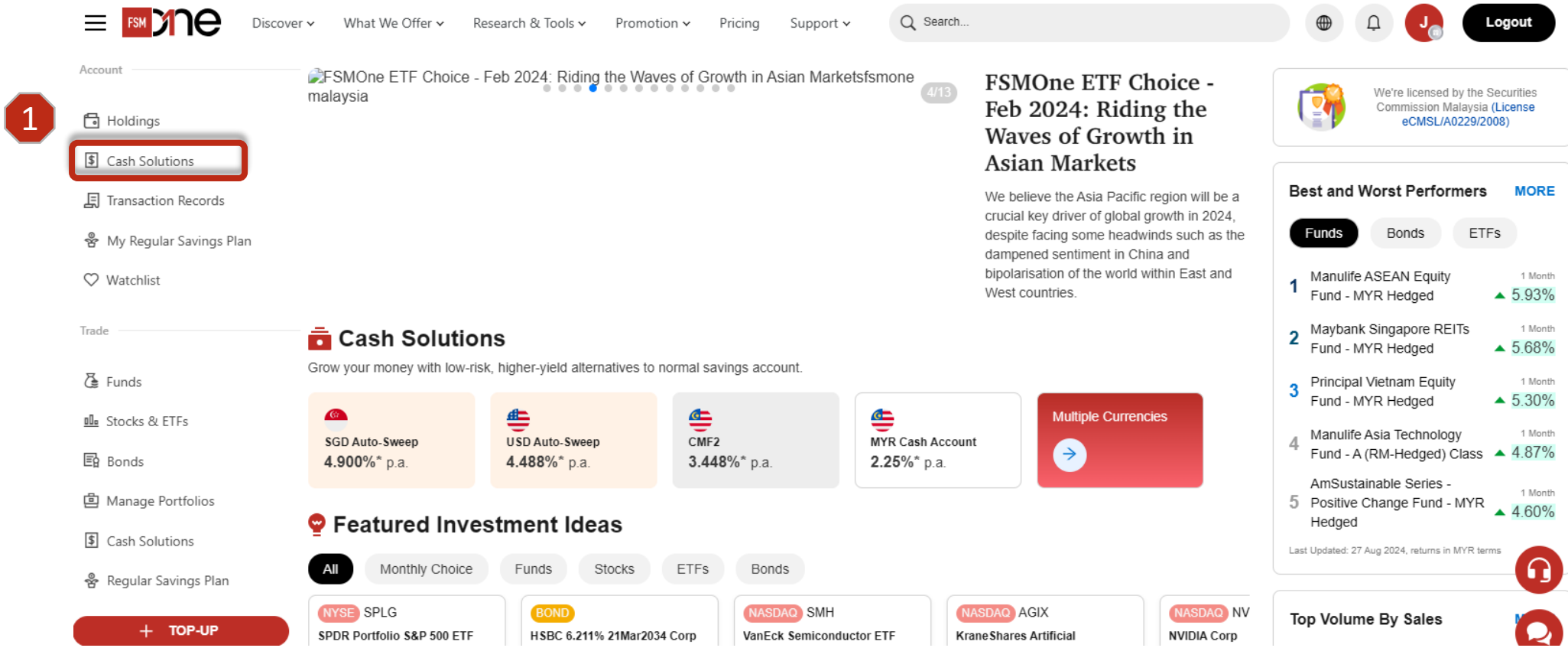
FSMOne step by step guide

Cash Account - Withdrawal

Cash Account Withdrawal on FSMOne

Step 1

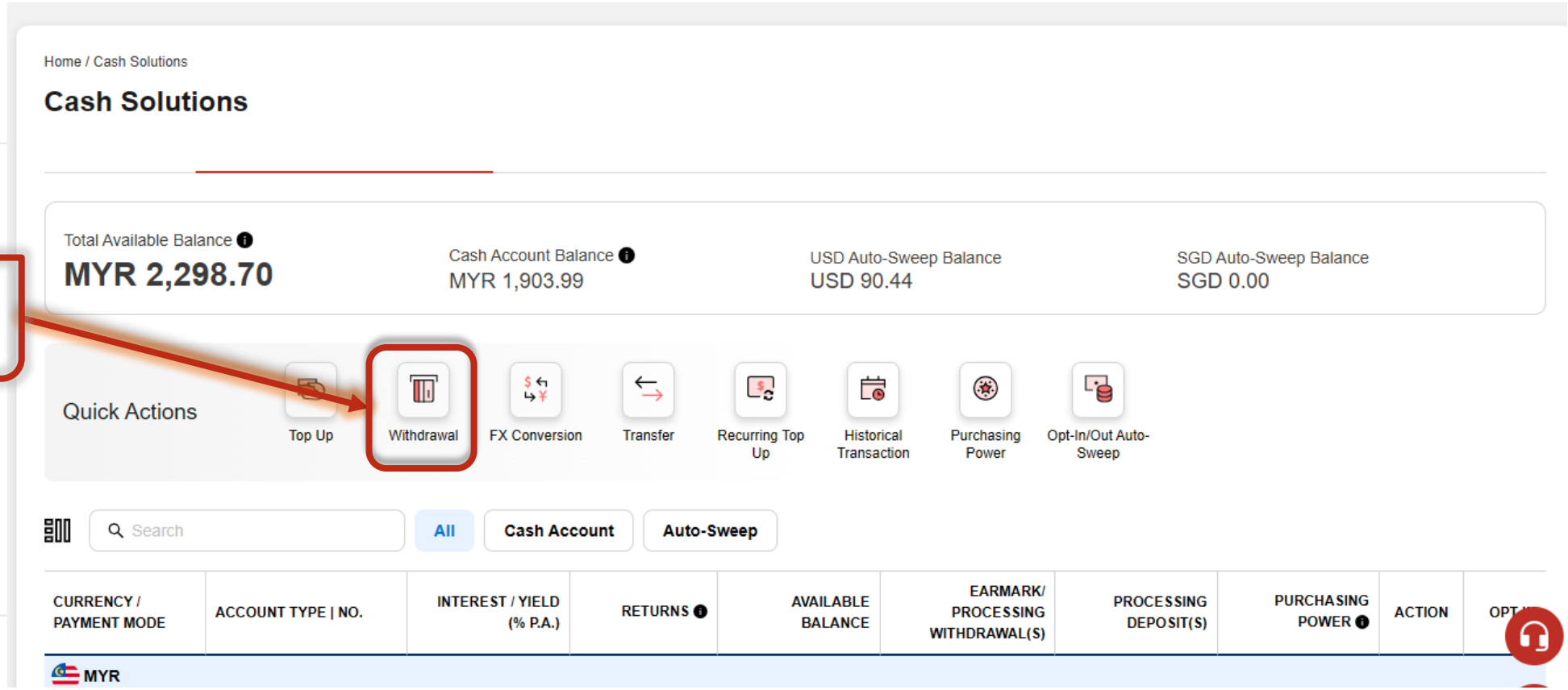
- **Click on [Cash Solution]**



Cash Account Withdrawal on FSMOne

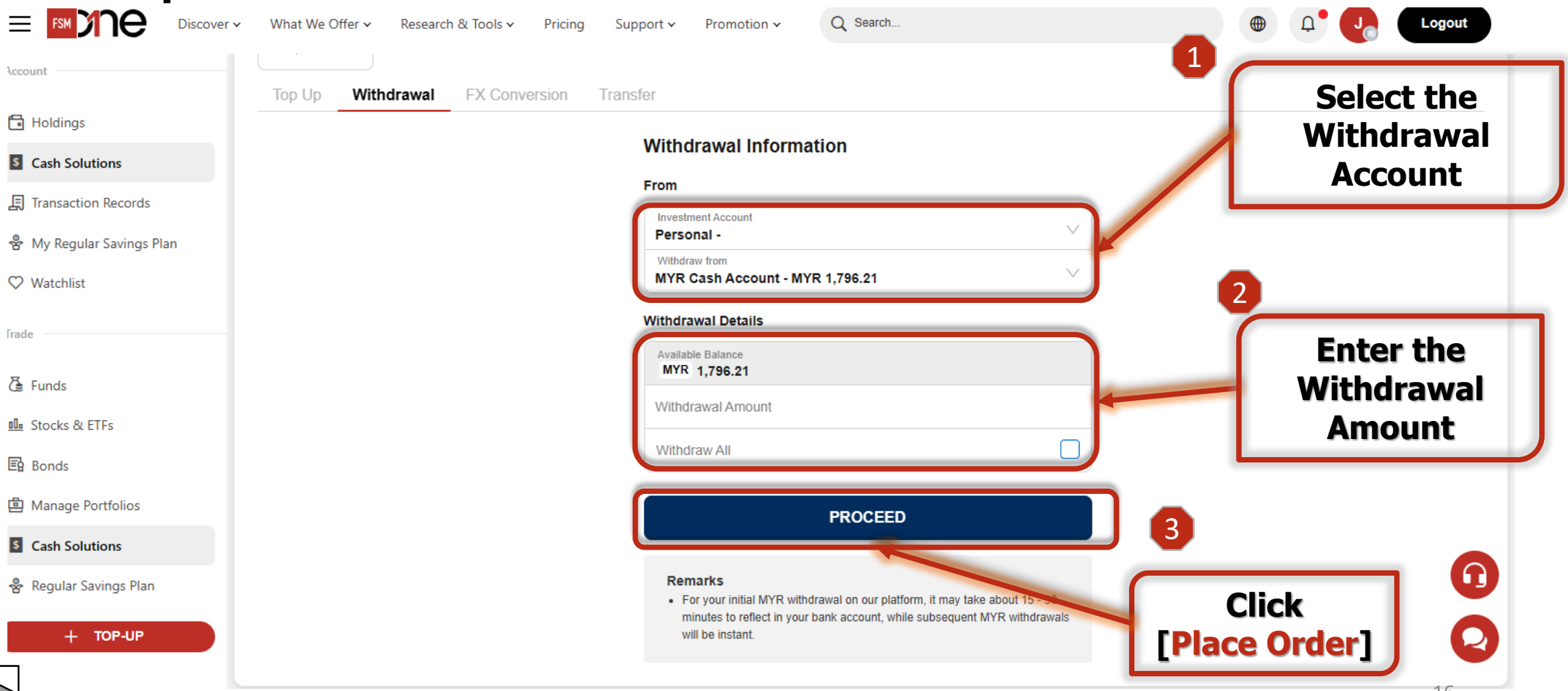
Step 2

Click on [Withdrawal]



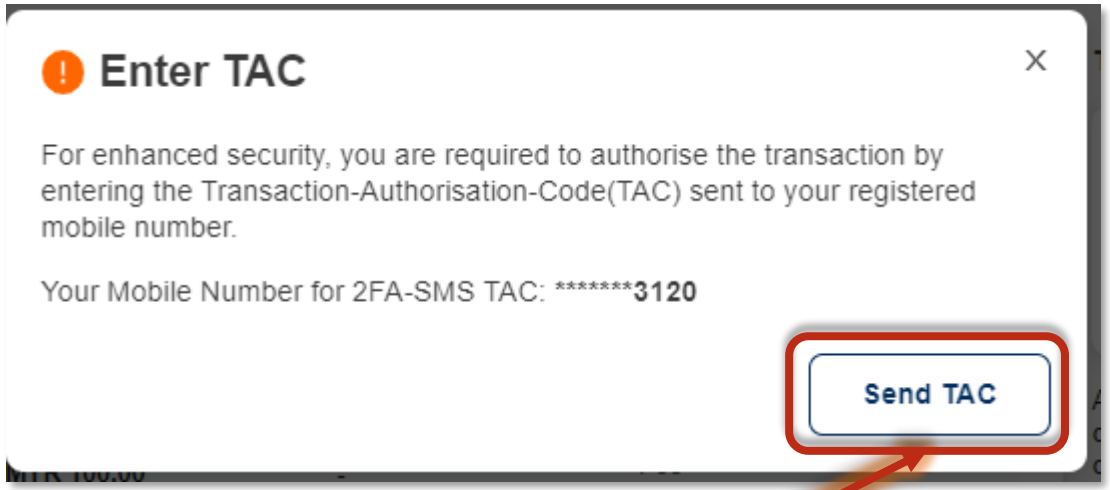
Cash Account Withdrawal on FSMOne

Step 3



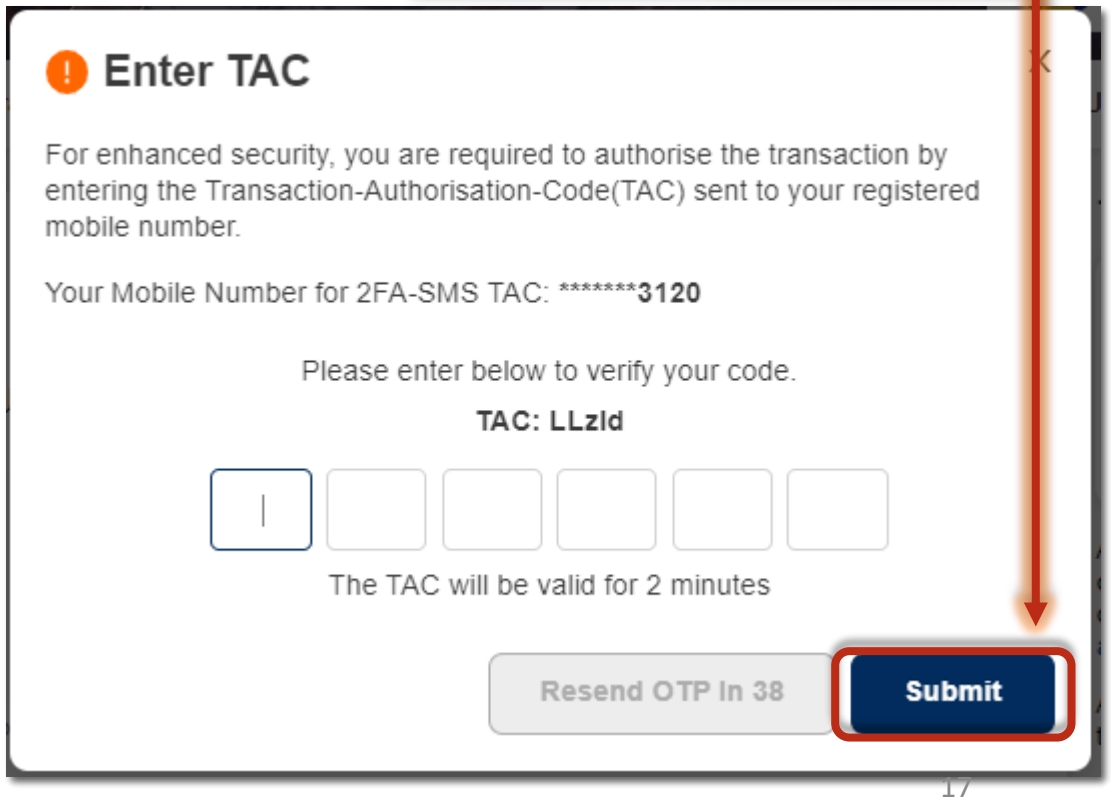
Cash Account Withdrawal on FSMOne

➲ Step 4



Click [Send TAC]

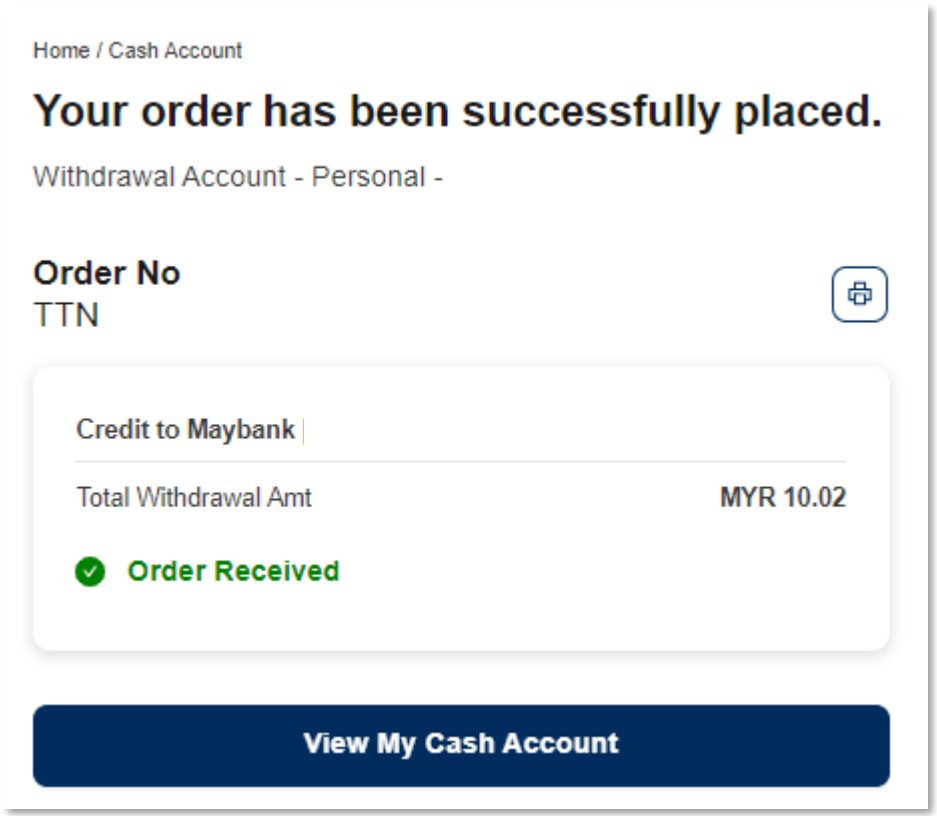
Enter TAC and Click [Submit]



Cash Account Withdrawal on FSMOne

➲ Step 5

The money will be transferred to your bank account



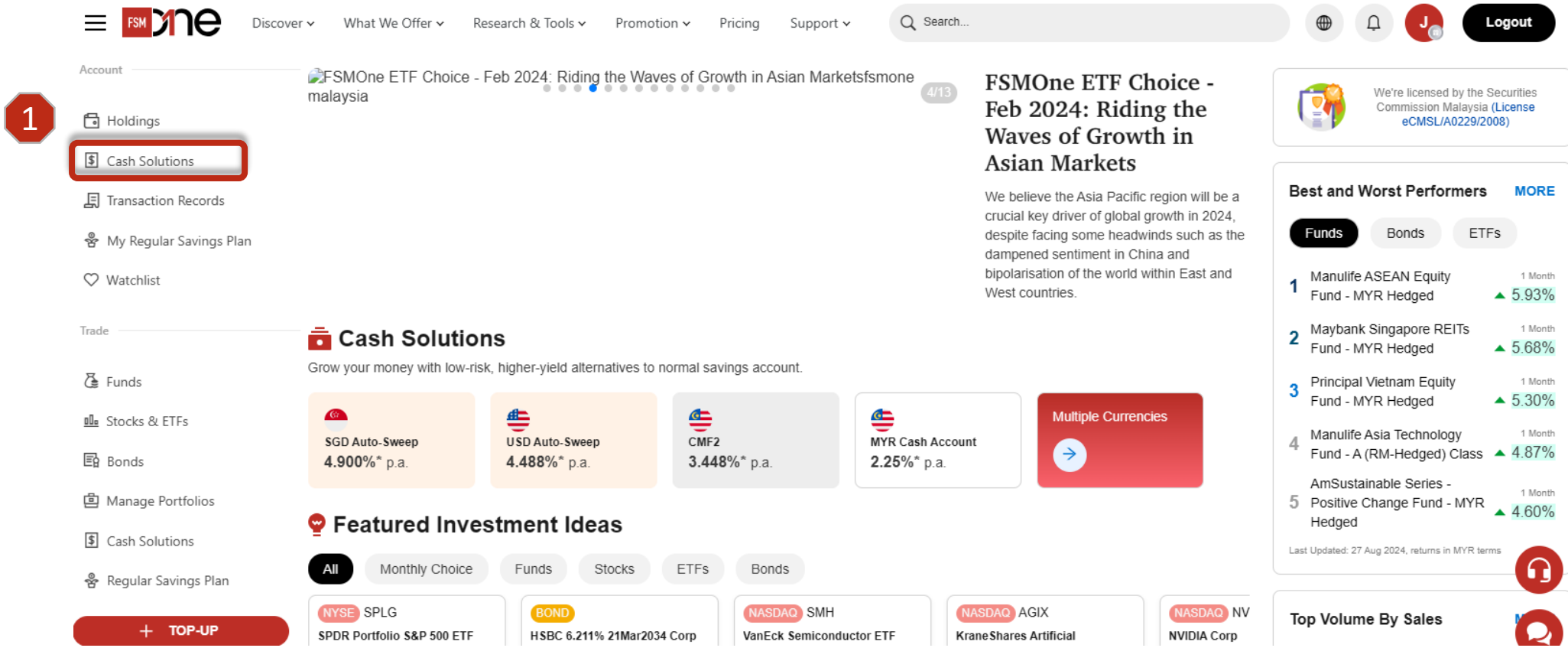
FSMOne step by step guide

Cash Account - FX Conversion

Cash Account FX Conversion on FSMOne

Step 1

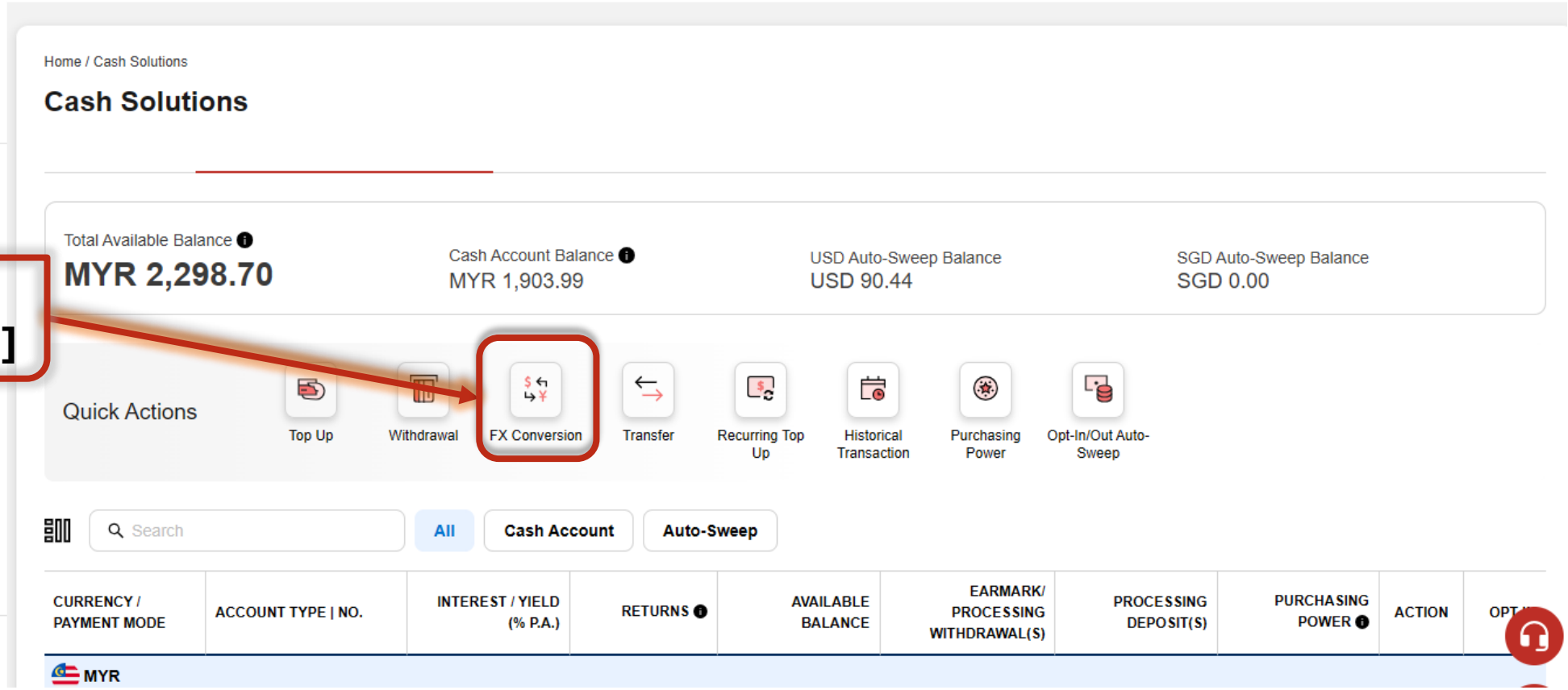
- **Click on [Cash Solution]**



Cash Account FX Conversion on FSMOne

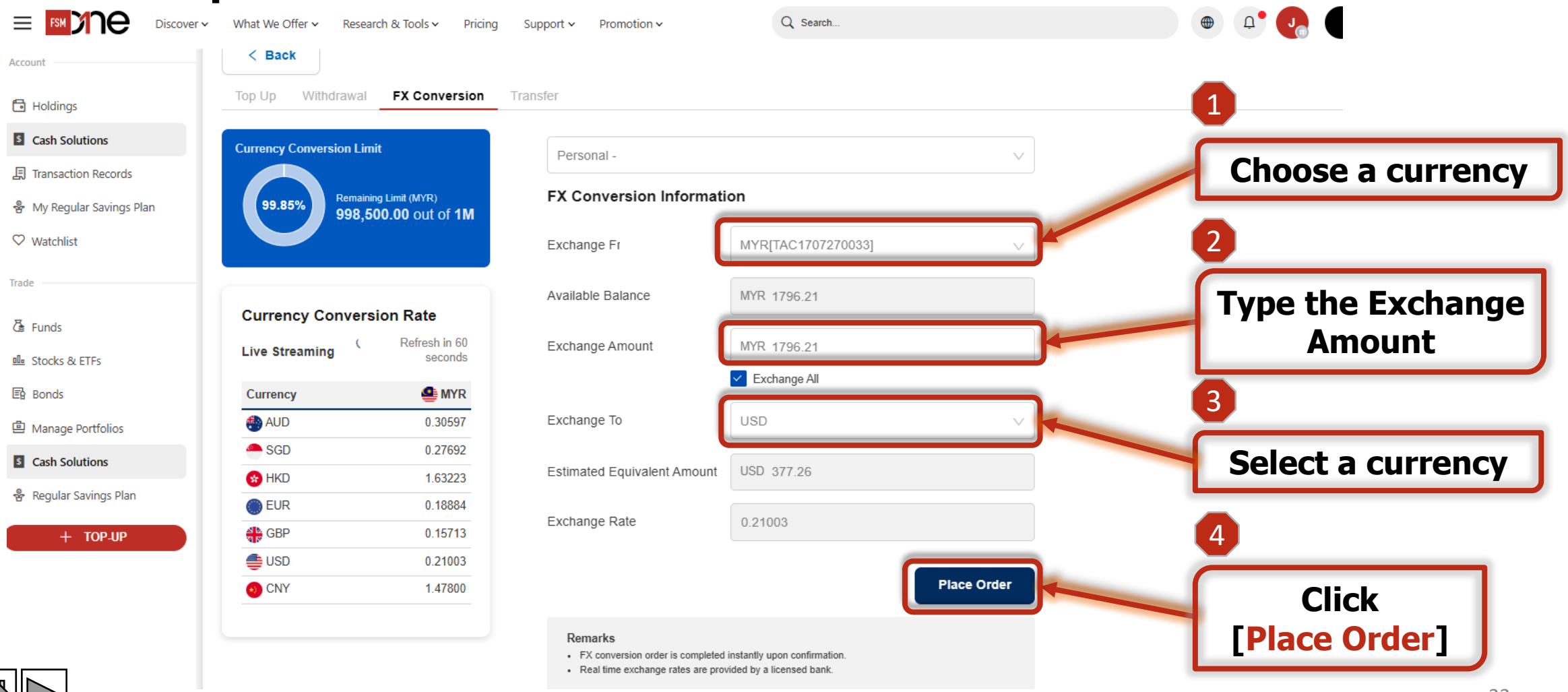
Step 2

Click on [FX Conversion]



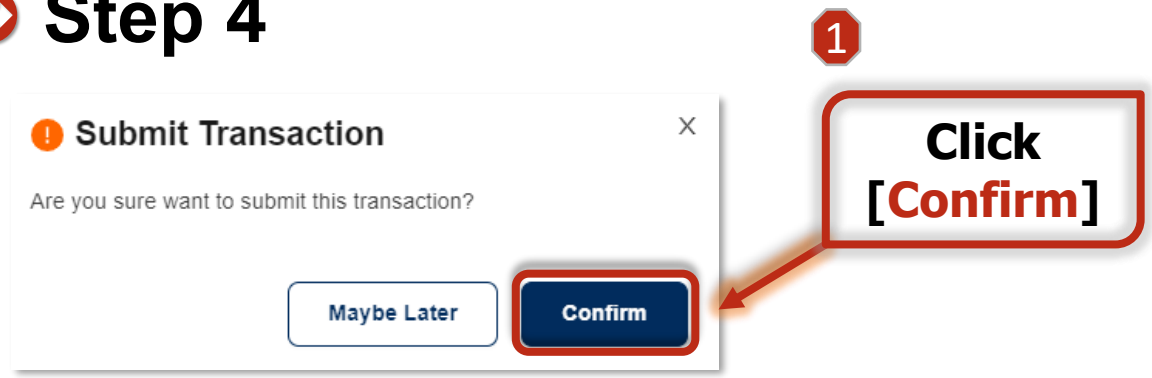
Cash Account FX Conversion on FSMOne

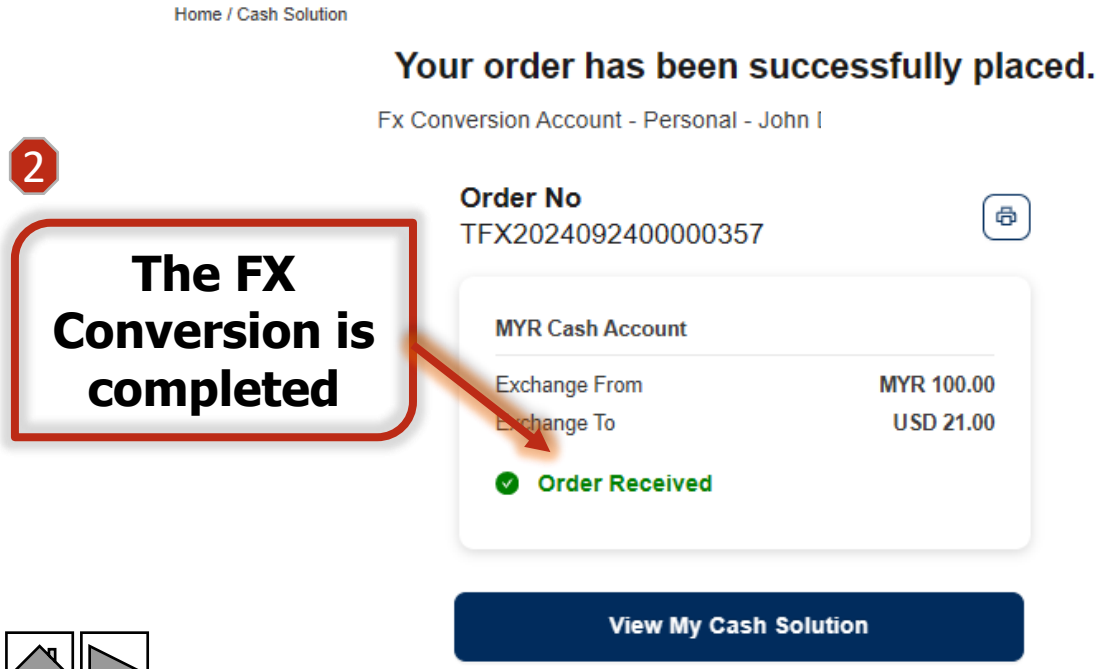
Step 3

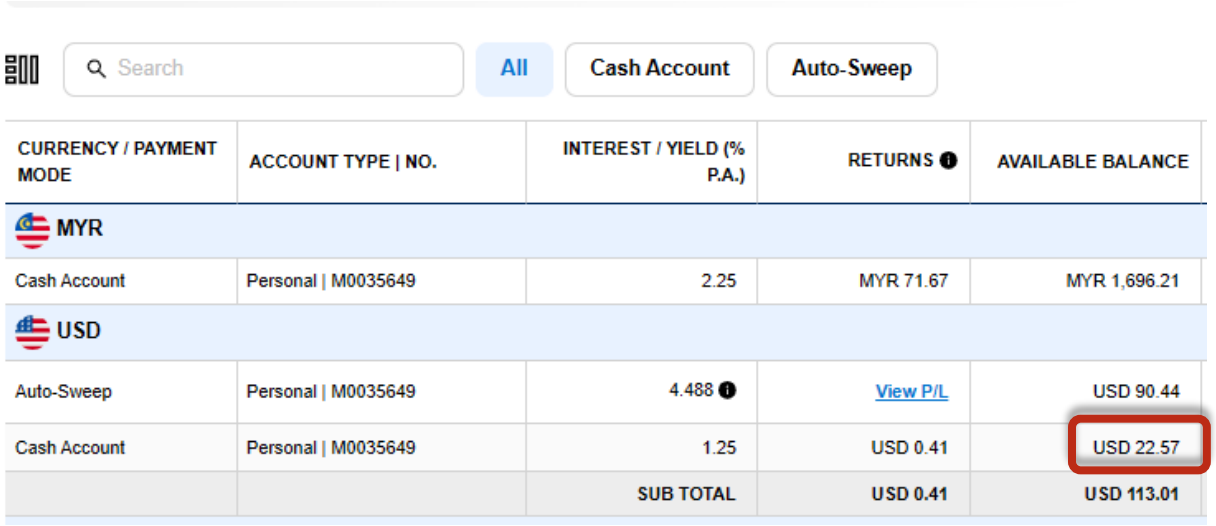


Cash Account FX Conversion on FSMOne

Step 4







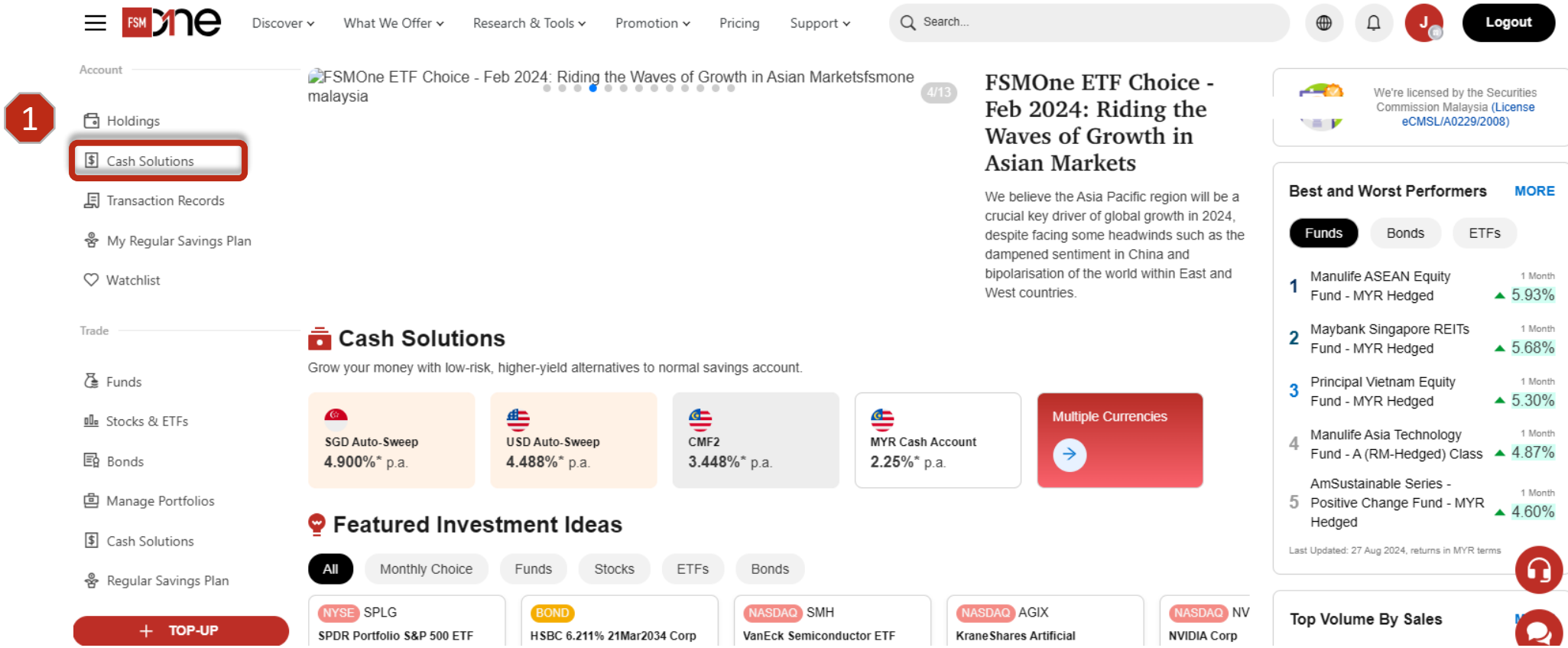
FSMOne step-by-step guide

TOP-UP USD AUTO-SWEEP

USD AUTO-SWEEP top up on FSMOne

Step 1

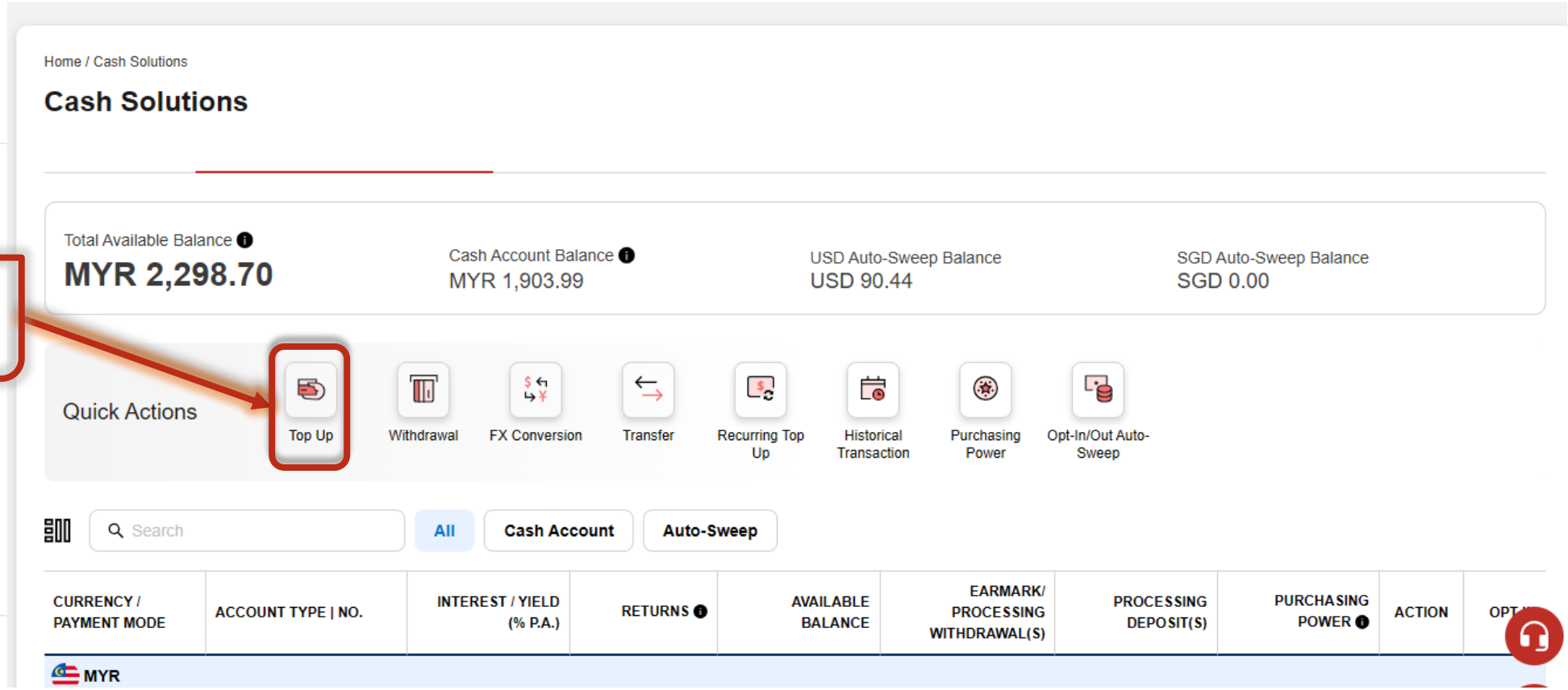
- **Click on [Cash Solution]**



USD AUTO-SWEEP top up on FSMOne

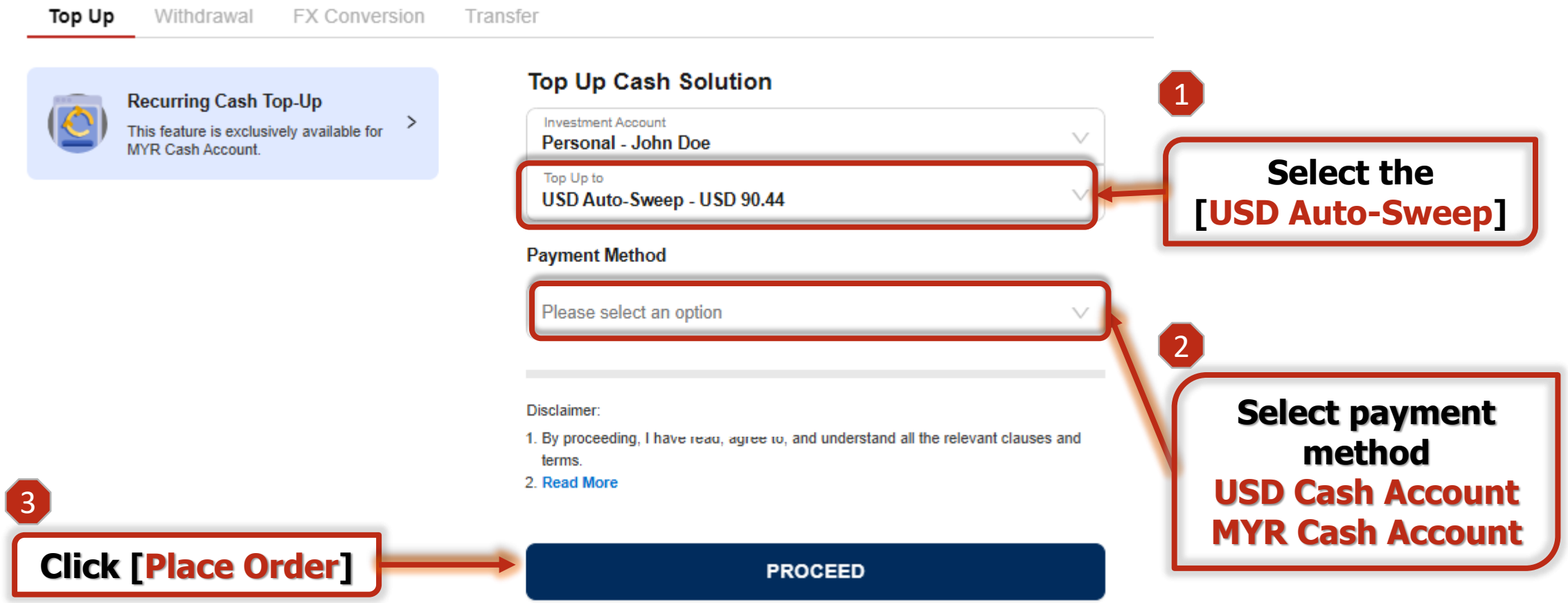
Step 2

Click on [Top Up]



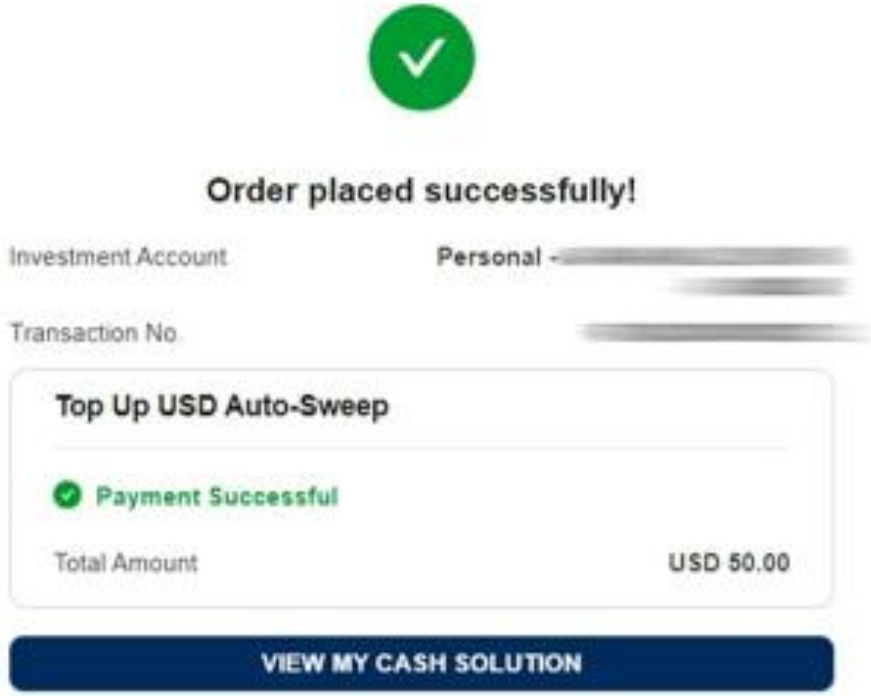
USD AUTO-SWEEP top up on FSMOne

Step 3



Cash Account top up on FSMOne

- Done



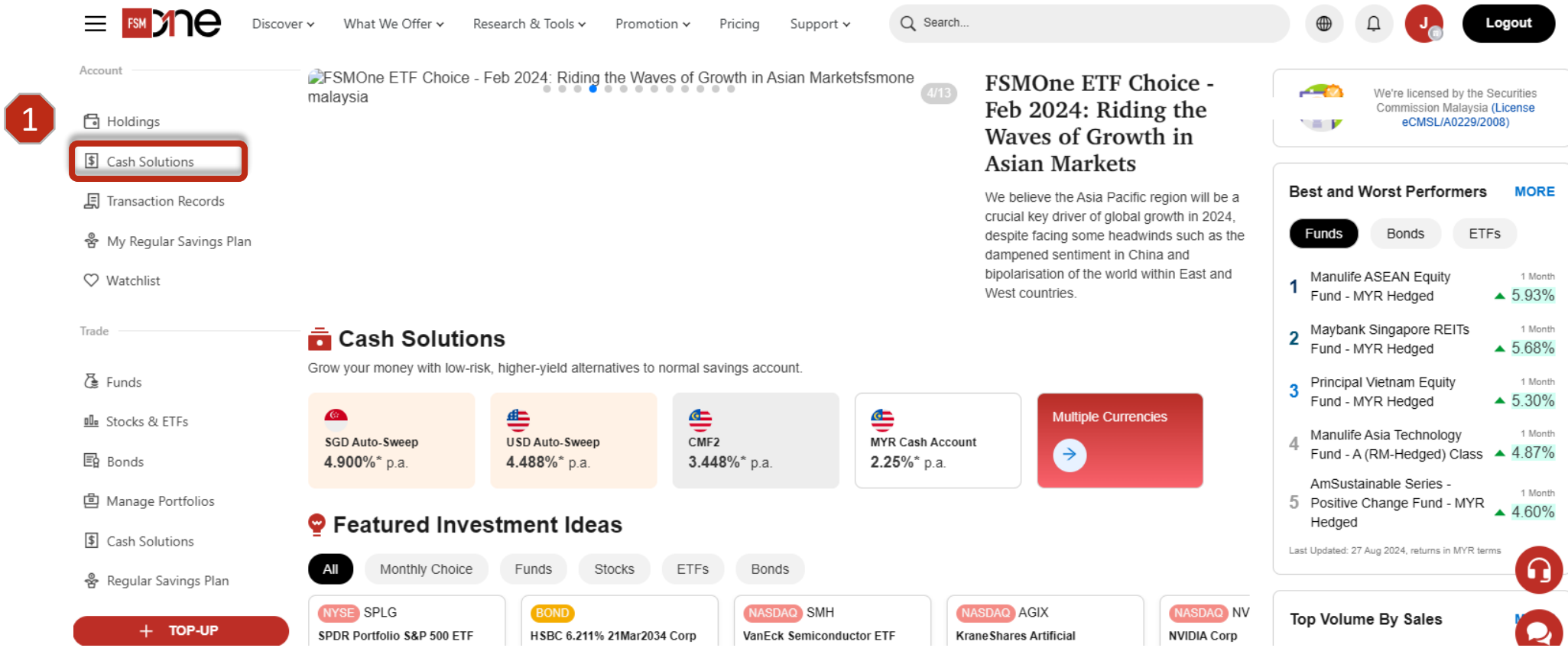
FSMOne step by step guide

USD AUTO-SWEEP (WITHDRAWAL)

USD AUTO-SWEEP Withdrawal on FSMOne

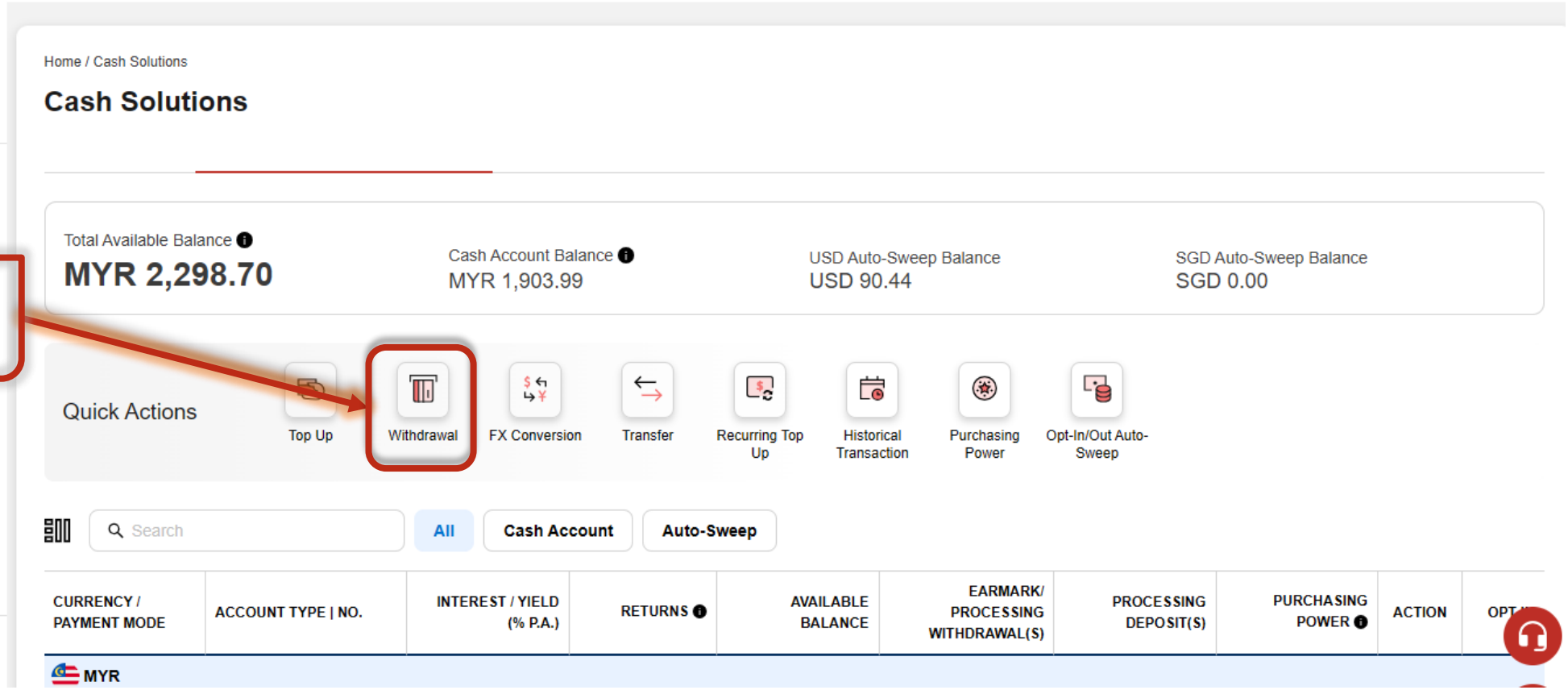
Step 1

- **Click on [Cash Solution]**



USD AUTO-SWEEP Withdrawal on FSMOne

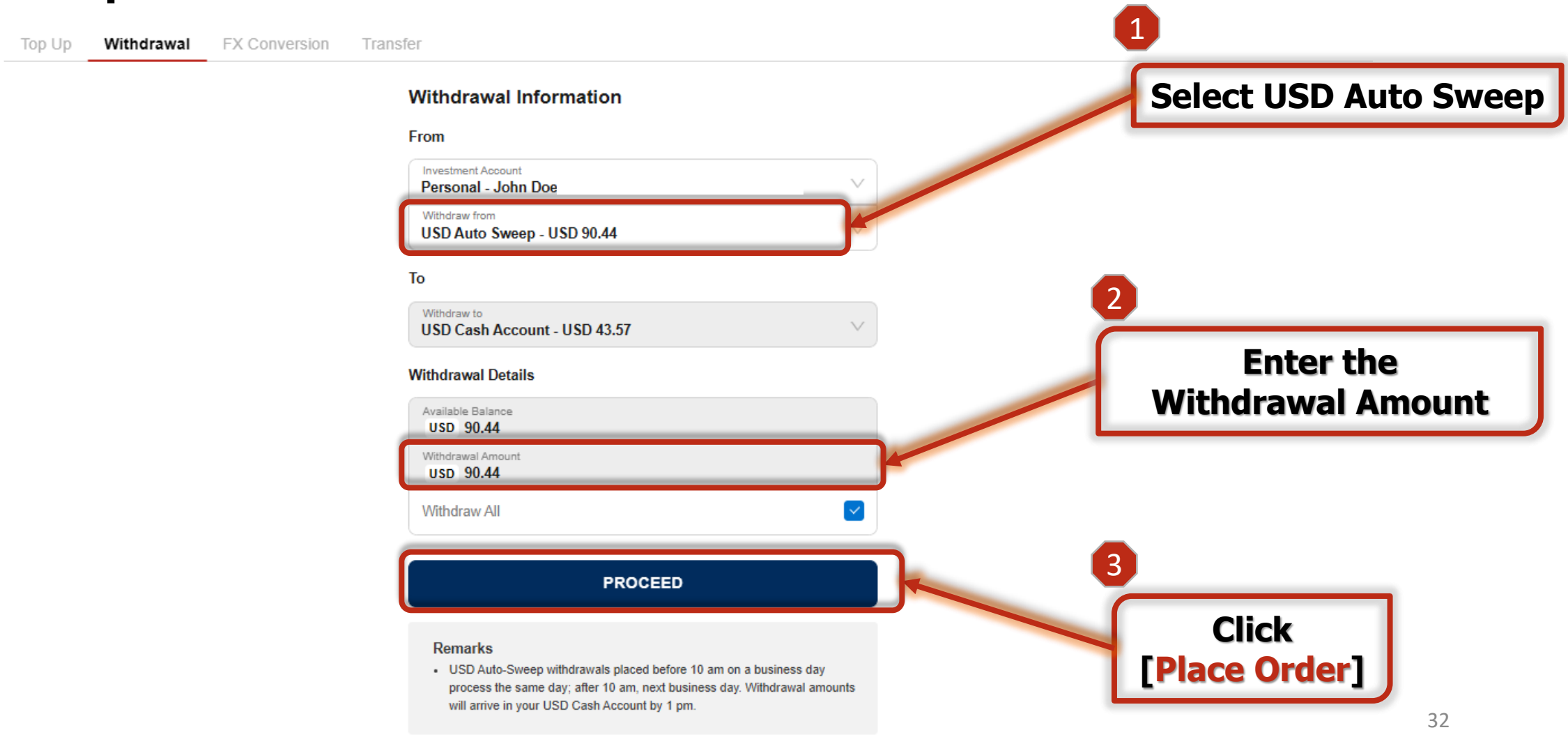
Step 2



Click on [Withdrawal]

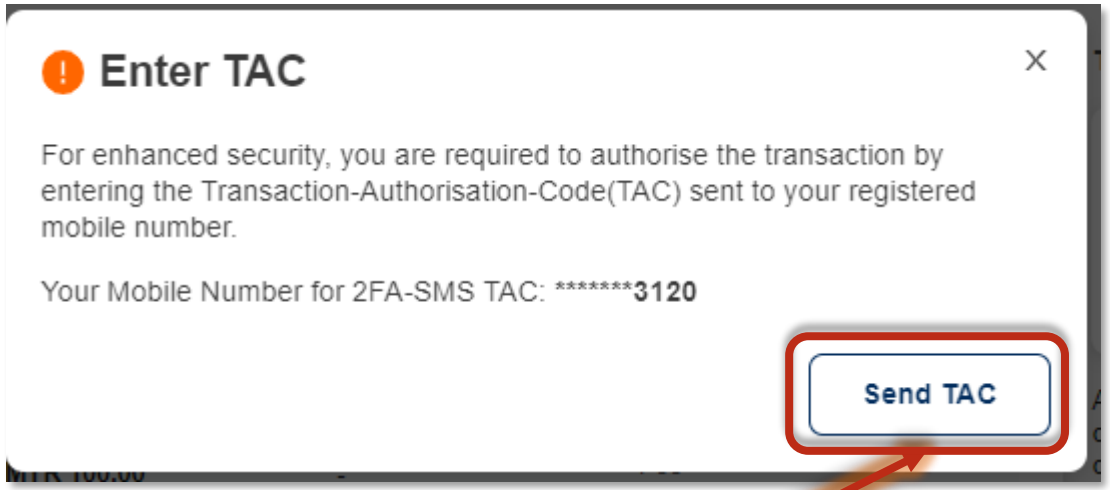
USD AUTO-SWEEP Withdrawal on FSMOne

Step 3



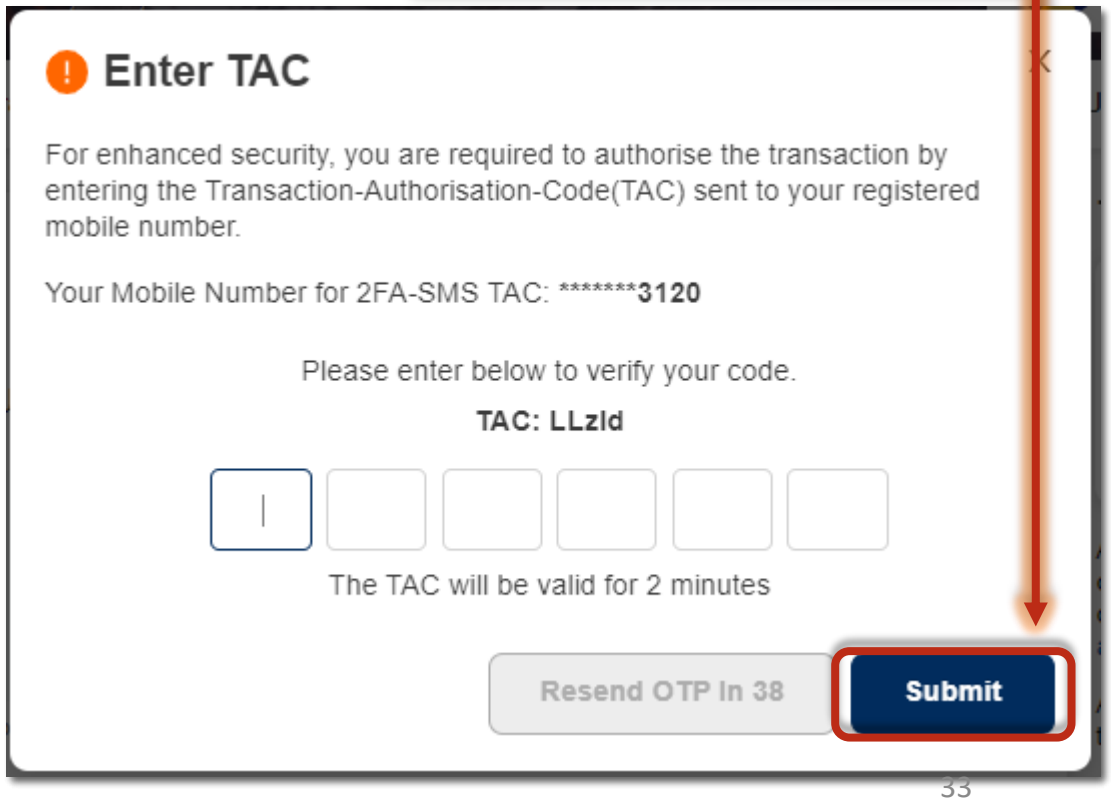
Cash Account Withdrawal on FSMOne

➲ Step 4



Click [Send TAC]

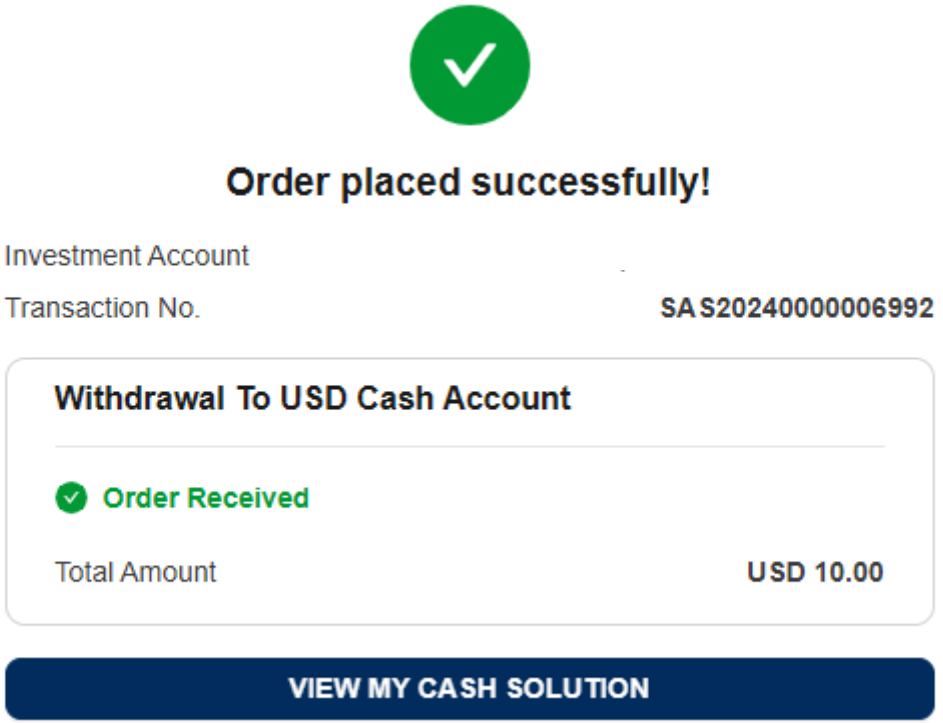
Enter TAC and Click [Submit]



Cash Account Withdrawal on FSMOne

Step 5

The money will be transferred to your USD Cash account



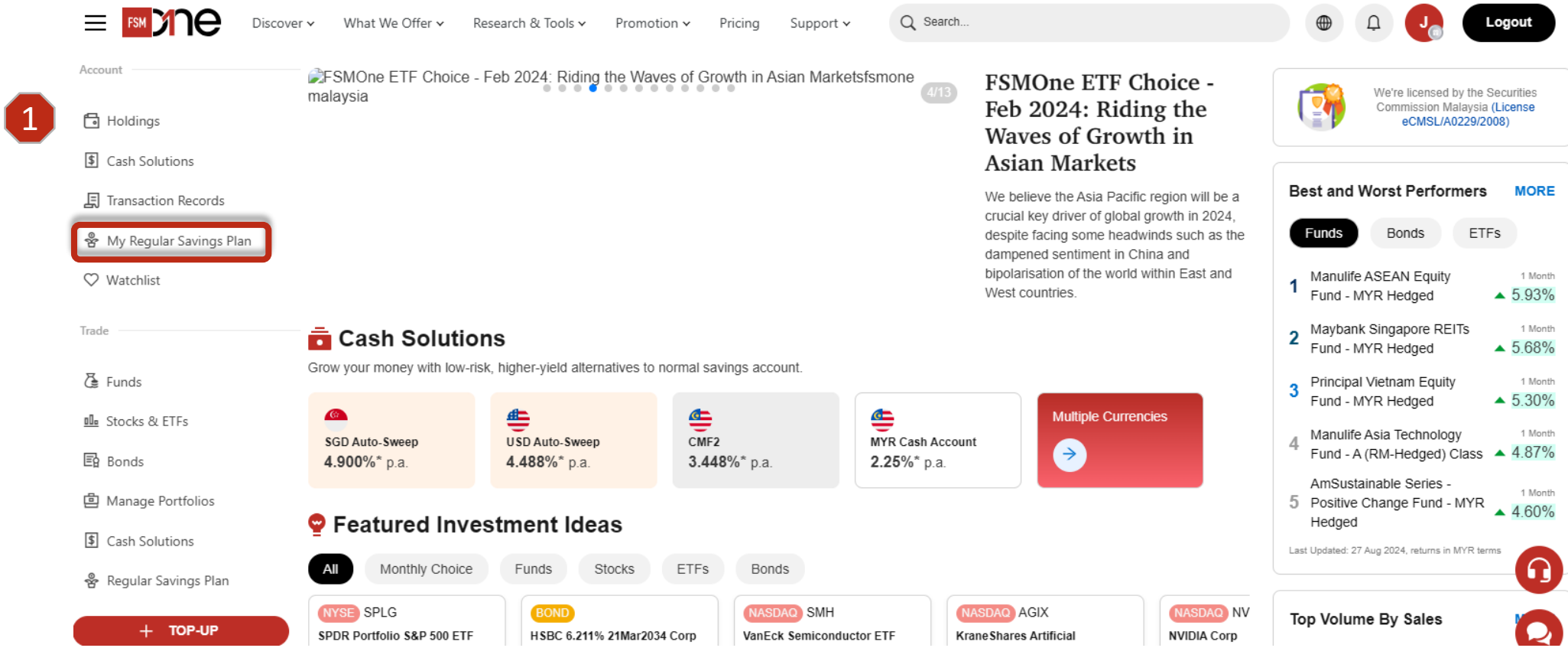
FSMOne step by step guide

FPX e-Mandate Setup / Amend / Terminate

Setup FPX e-Mandate on FSMOne

Step 1

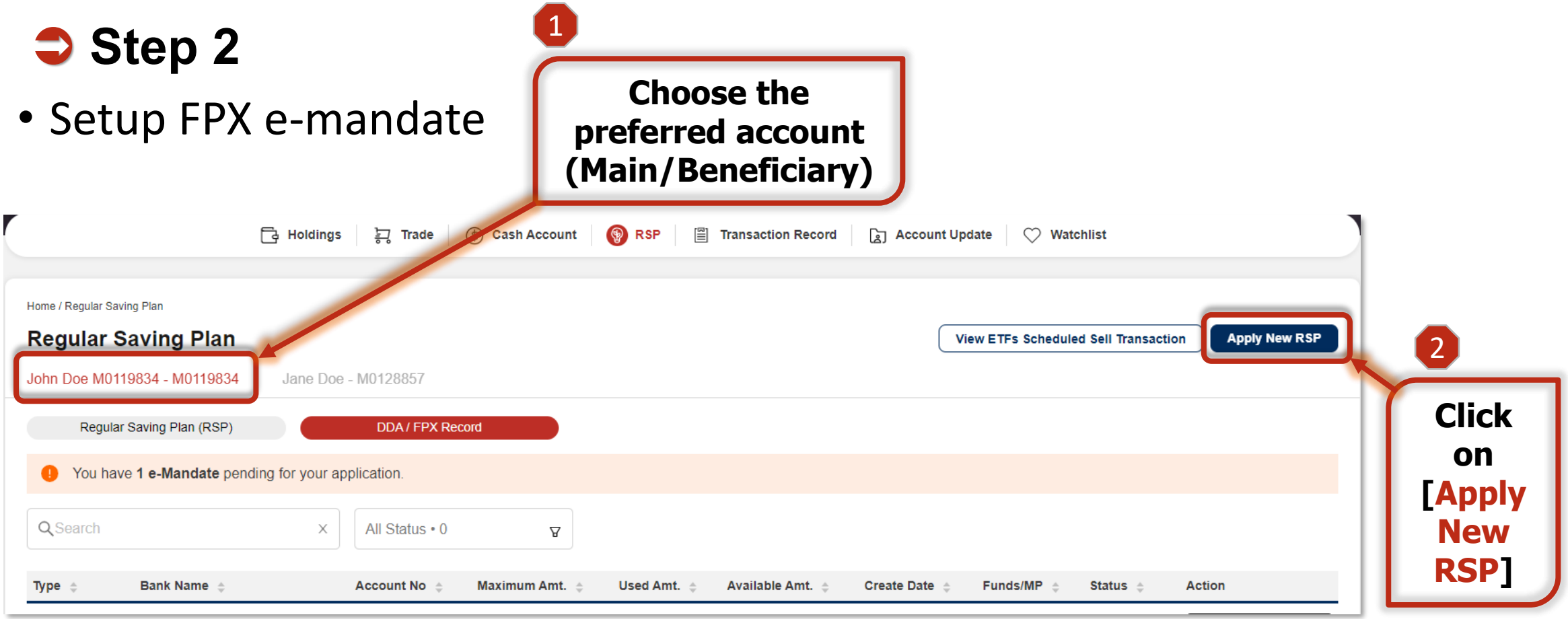
- **Click on [My Regular Savings Plan]**



Setup FPX e-Mandate on FSMOne

Step 2

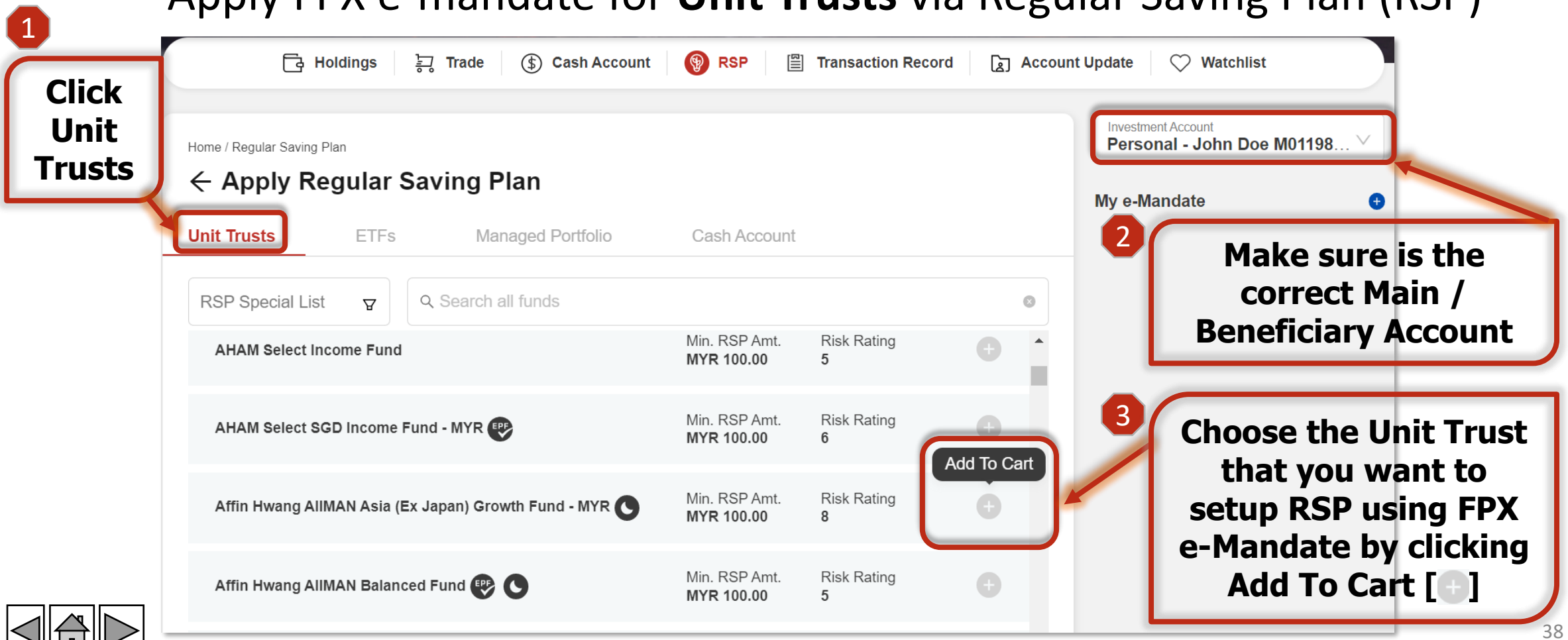
- Setup FPX e-mandate



Setup FPX e-Mandate on FSMOne

➲ Step 3

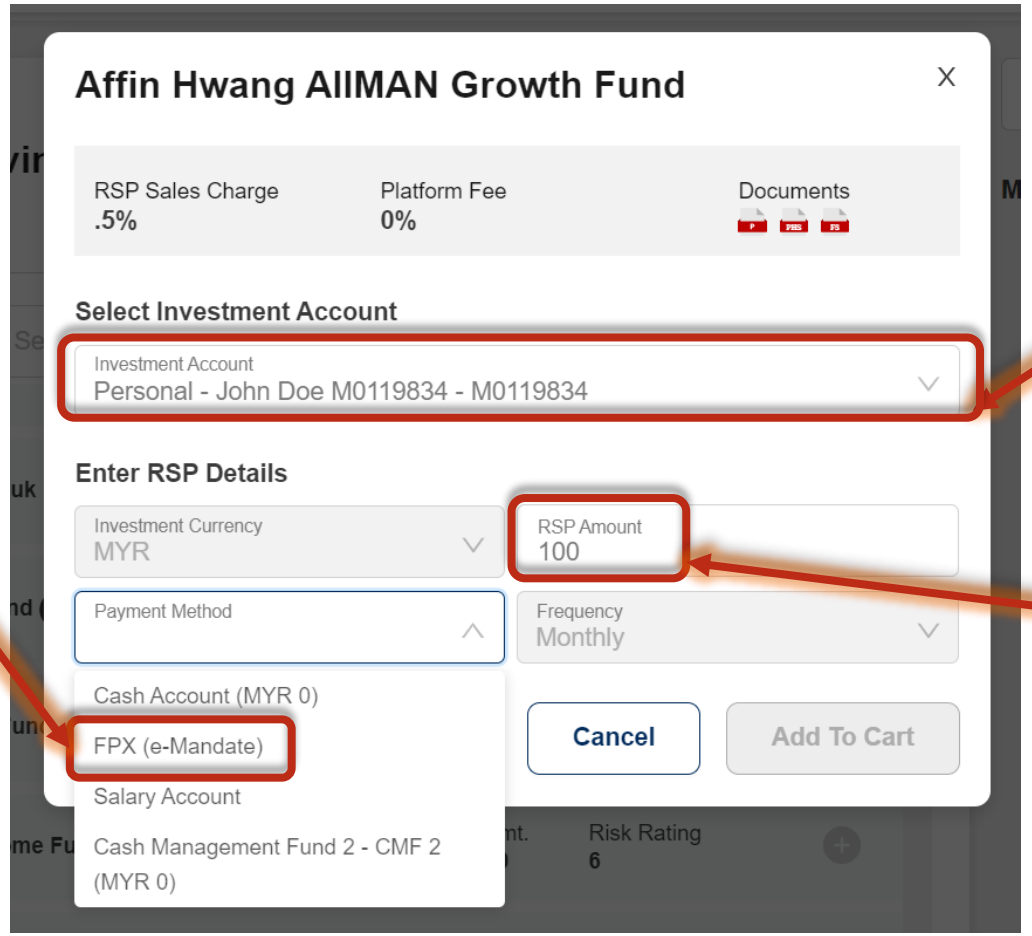
- Apply FPX e-mandate for **Unit Trusts** via Regular Saving Plan (RSP)



Setup FPX e-Mandate on FSMOne

➲ Step 4

- Apply FPX e-mandate for **Unit Trusts** via Regular Saving Plan (RSP)



1 **Make sure is the correct Main / Beneficiary Account**

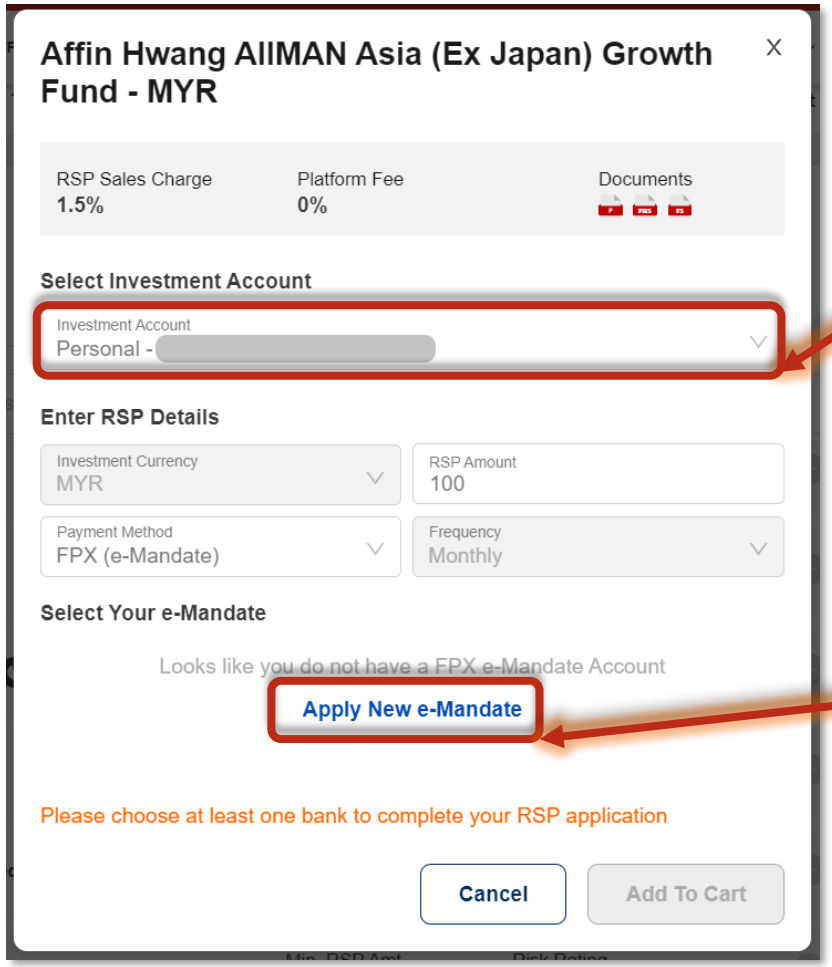
2 **Key in the Unit Trust RSP Amount**

3 **Select [FPX (e-Mandate)] as the Payment Method**

Setup FPX e-Mandate on FSMOne

➲ Step 5

- Apply FPX e-mandate for **Unit Trust** via Regular Saving Plan (RSP)



1

Make sure is the correct Main / Beneficiary Account

2

Click on [Apply New e-Mandate]

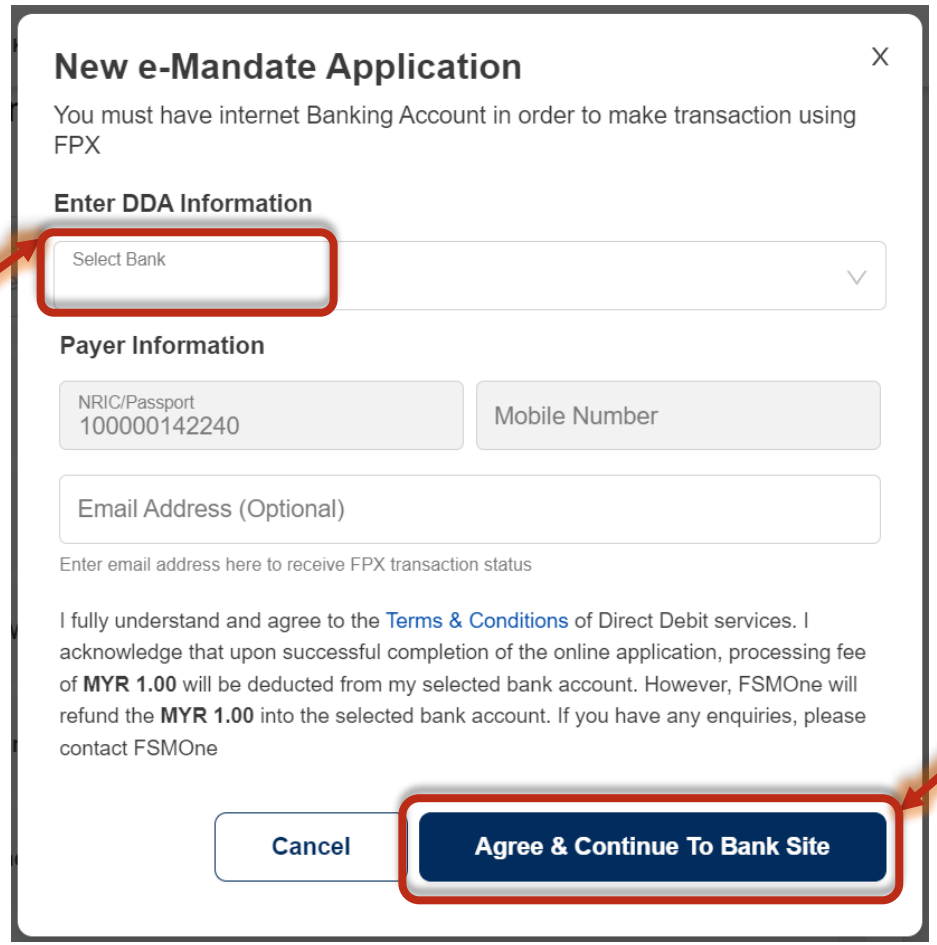
Setup FPX e-Mandate on FSMOne

➲ Step 6

- Agree & Continue to Bank Site

1

Select your preferred Bank



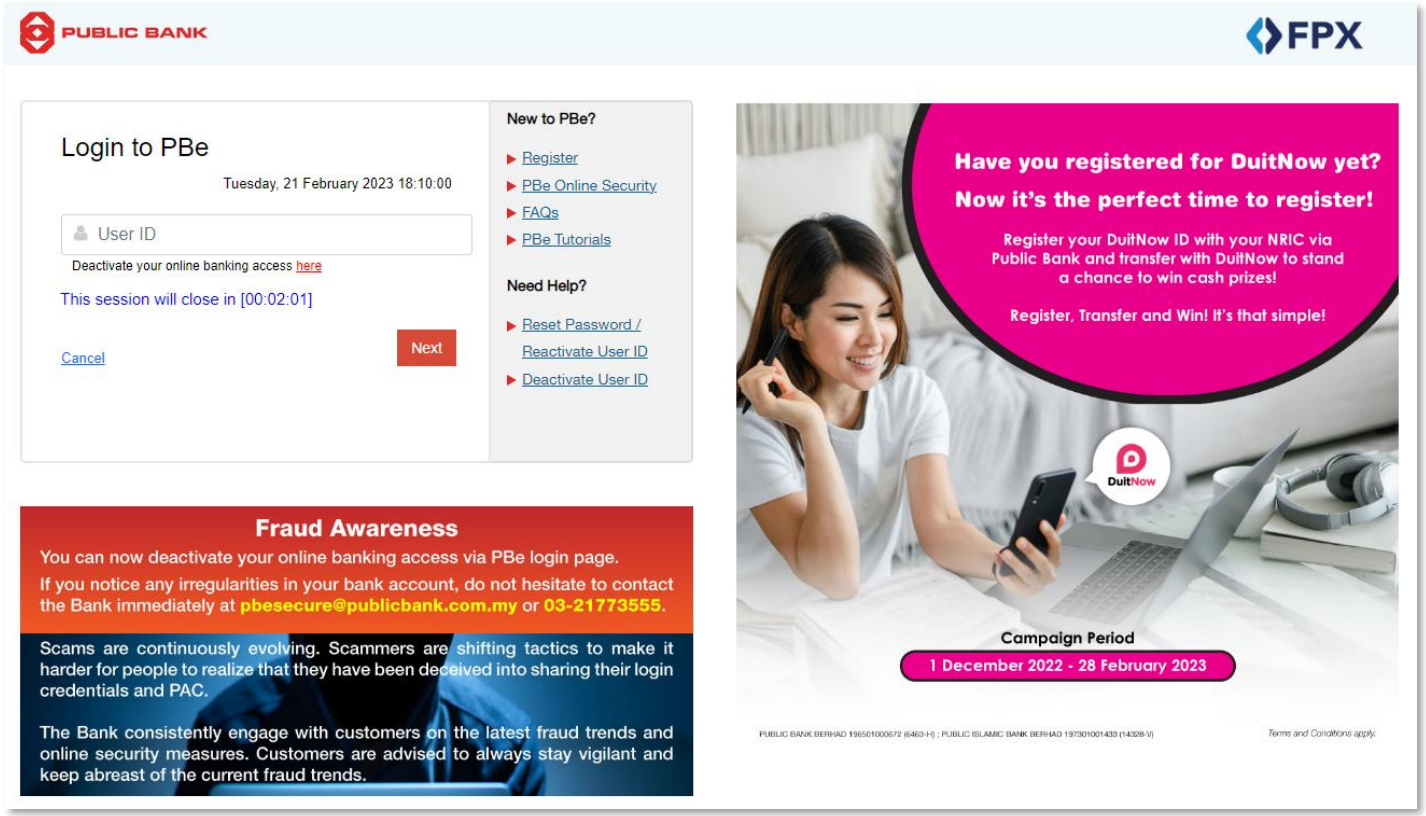
2

Click [Agree & Continue to Bank Site]

Setup FPX e-Mandate on FSMOne

➲ Step 7

- It will redirect you to the respective bank's website. Please login and proceed accordingly.



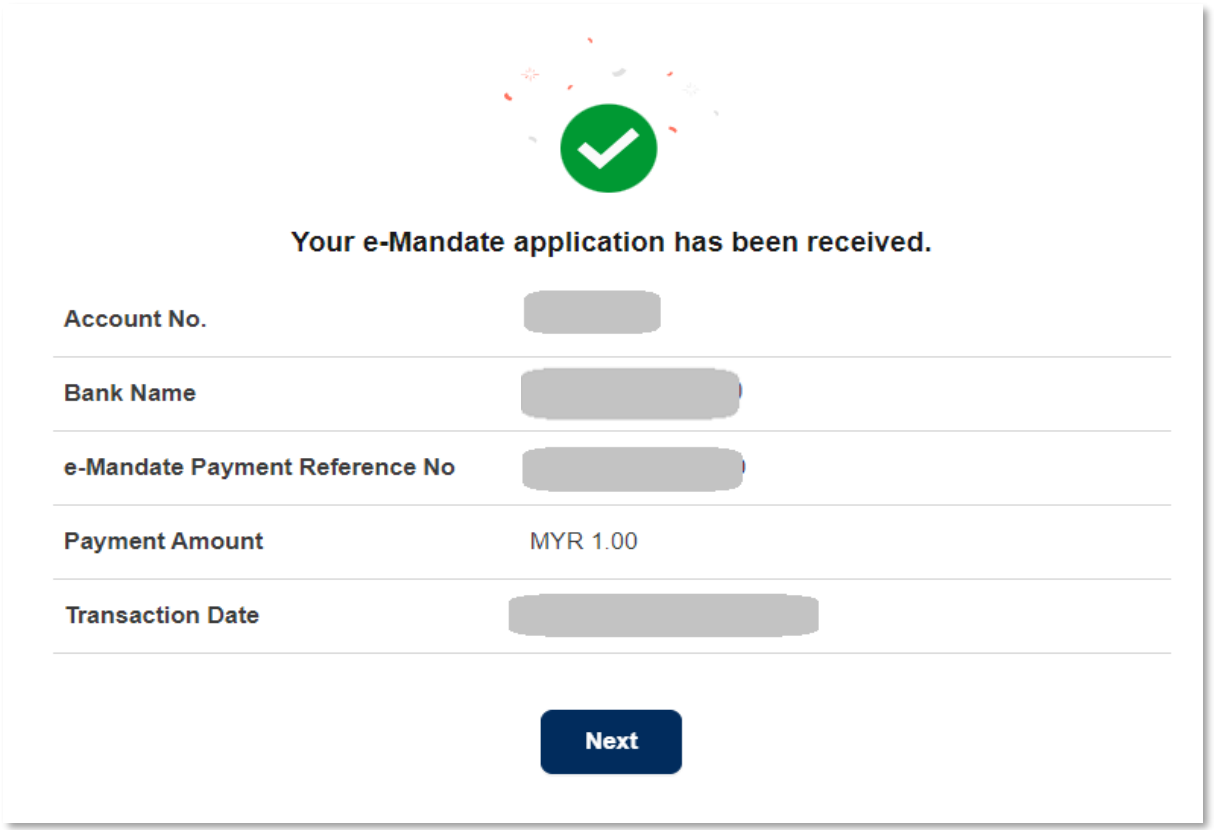
Note:

- MYR 1.00 will be deducted from your bank account upon successful application, amendments and termination.
- However, the amount will be refunded to your bank account in 7 business days.
- Bank will deduct payment from your bank account 4 business days before the 15th of every month or the next business day if the 15th is a non-business day.

Setup FPX e-Mandate on FSMOne

➲ Step 8

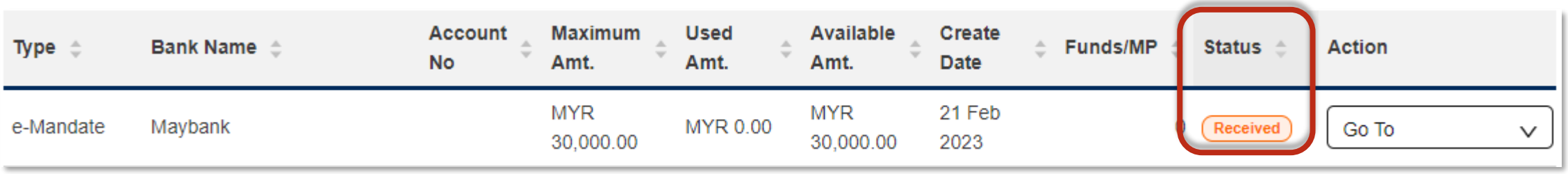
- Upon completing MYR 1.00 payment, your e-Mandate application will display the received status.



Setup FPX e-Mandate on FSMOne

➲ Step 9a

- Upon completing MYR 1.00, your e-Mandate application will display the received status.

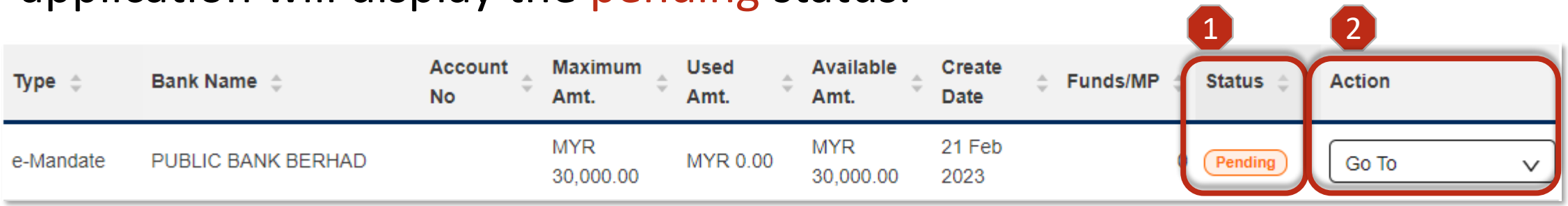


Type	Bank Name	Account No	Maximum Amt.	Used Amt.	Available Amt.	Create Date	Funds/MP	Status	Action
e-Mandate	Maybank		MYR 30,000.00	MYR 0.00	MYR 30,000.00	21 Feb 2023		Received	Go To

Setup FPX e-Mandate on FSMOne

Step 9b

- Should the MYR 1.00 payment is not successful, your e-Mandate application will display the pending status.



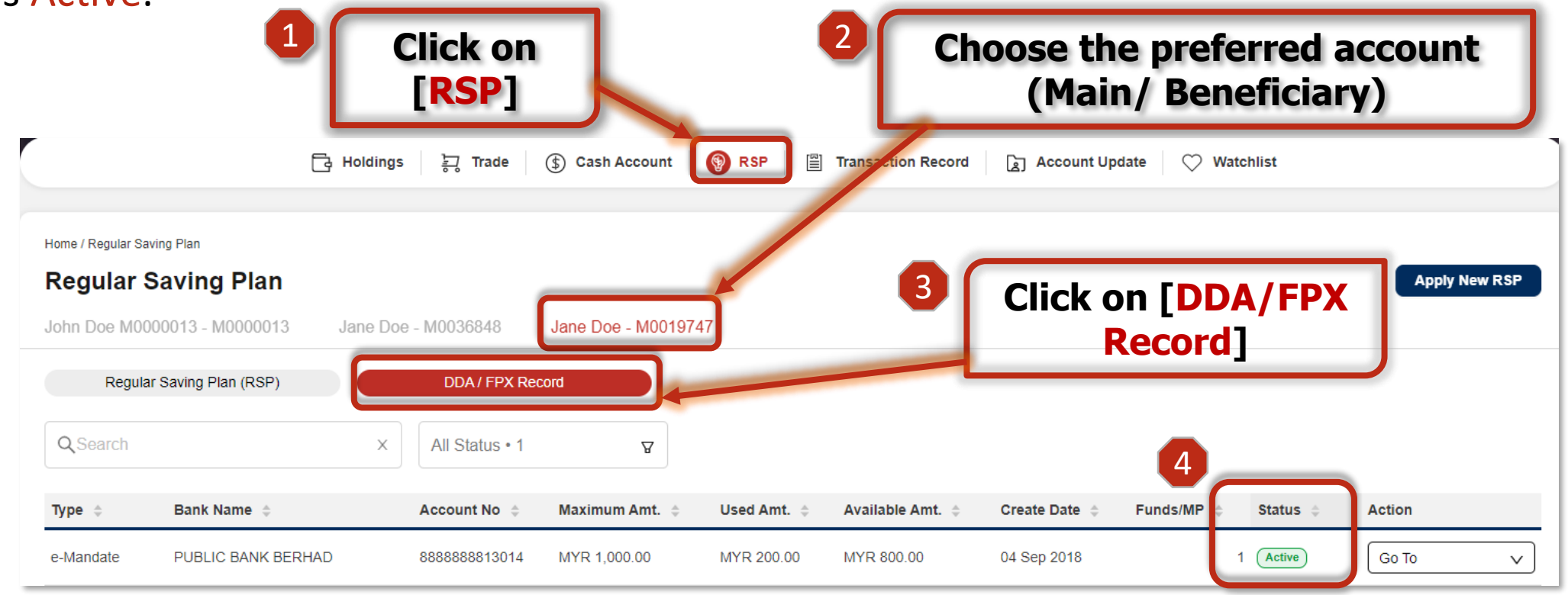
- To complete the application, click on [Go To] and [Apply e-Mandate], and repeat Step 7 to proceed with the payment.



Setup FPX e-Mandate on FSMOne

➲ Step 10

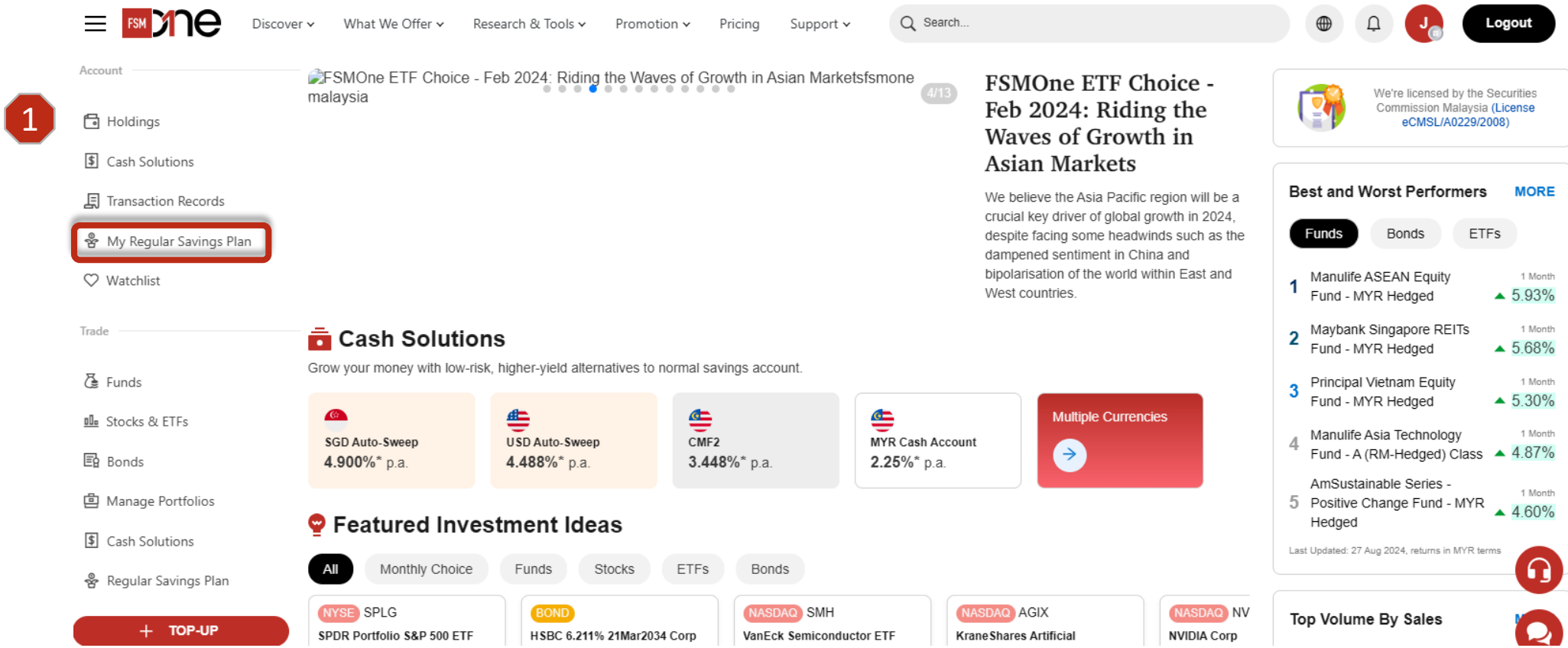
- The FPX e-Mandate application will take T+4 business days to process by the bank, and an email will be sent to notify you once the bank has approved the application.
- In your investment account, you may also check the **approved application** status display as Active.



Amend FPX e-Mandate on FSMOne

Step 1

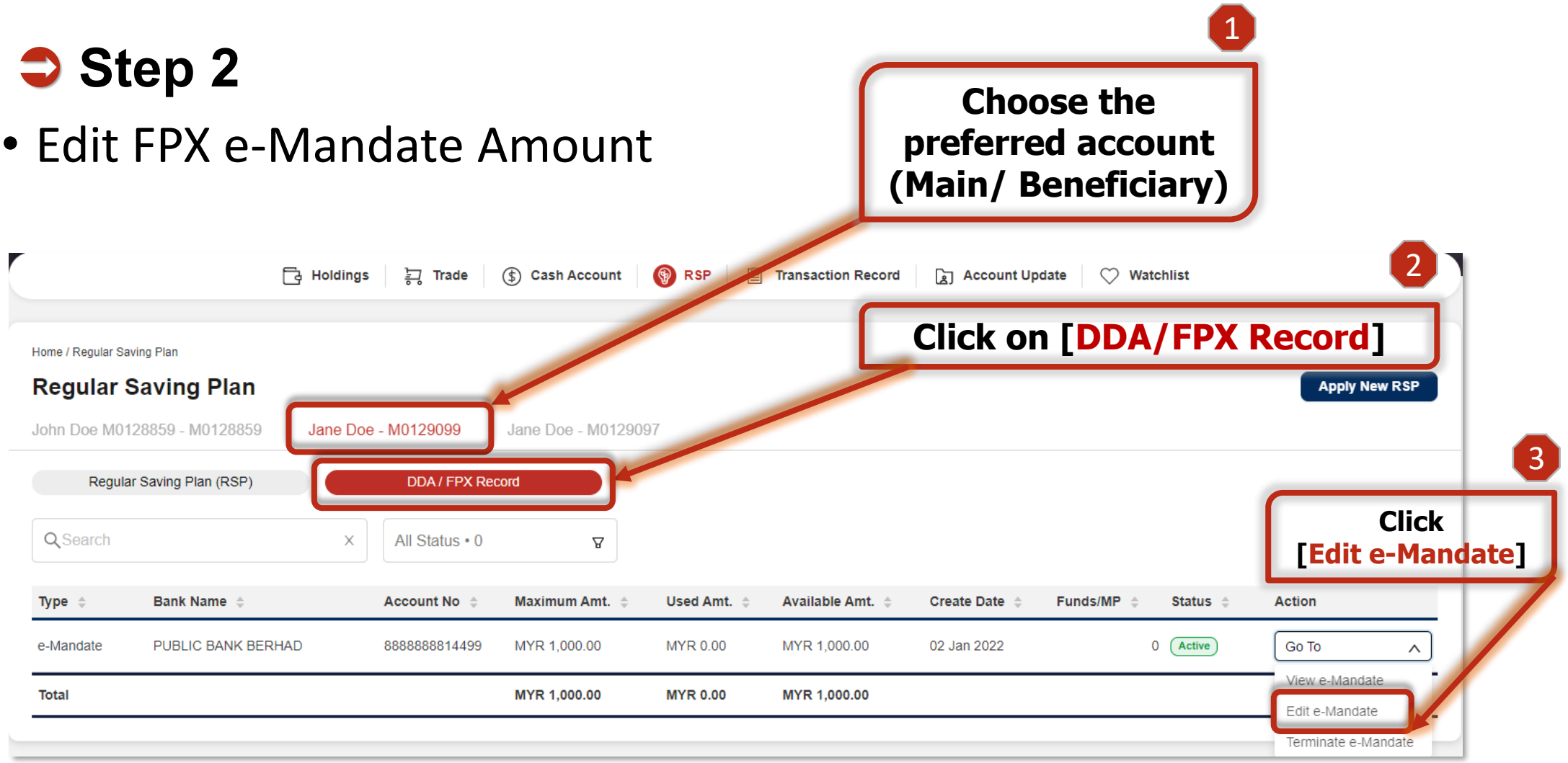
- **Click on [My Regular Savings Plan]**



Amend FPX e-Mandate on FSMOne

Step 2

- Edit FPX e-Mandate Amount



- To accommodate the deduction and transaction processes, request for a change of amount or termination received between 8th to 18th of the month will only take effect on the following month.

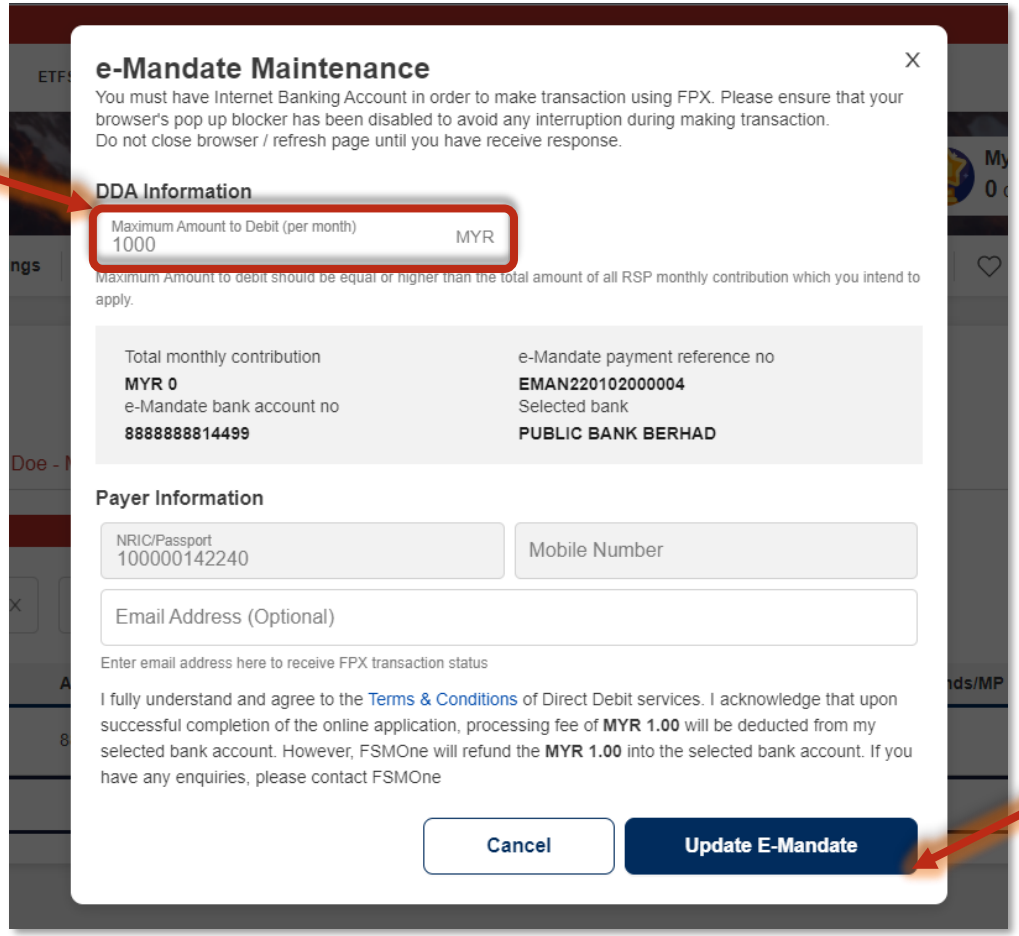
Amend FPX e-Mandate on FSMOne

➲ Step 3

- Edit Maximum Amount to Debit before clicking **[Update E-Mandate]**

1

Edit the Amount



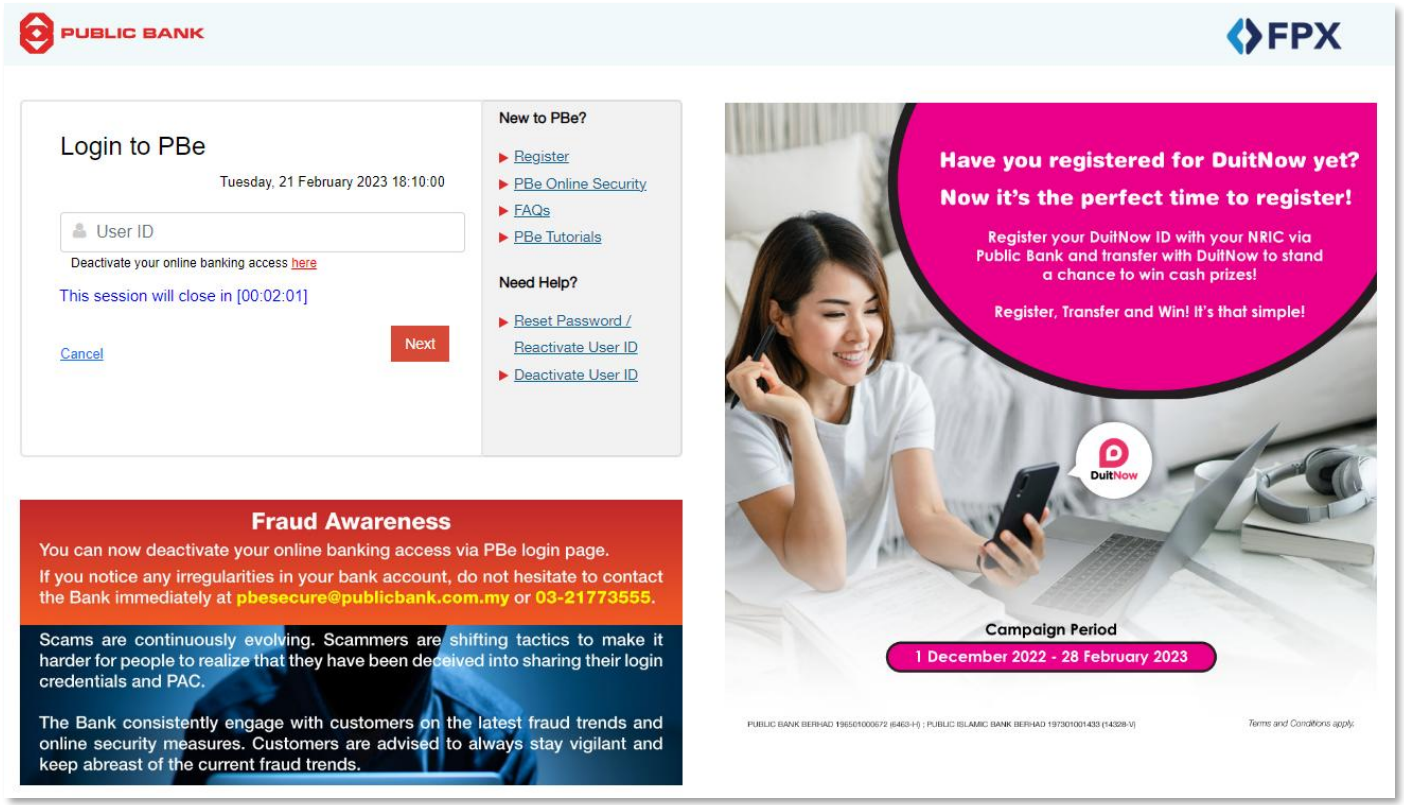
2

Click [Update E-Mandate]

Amend FPX e-Mandate on FSMOne

➲ Step 4

- It will redirect you to the respective bank's website. Please login and proceed accordingly.



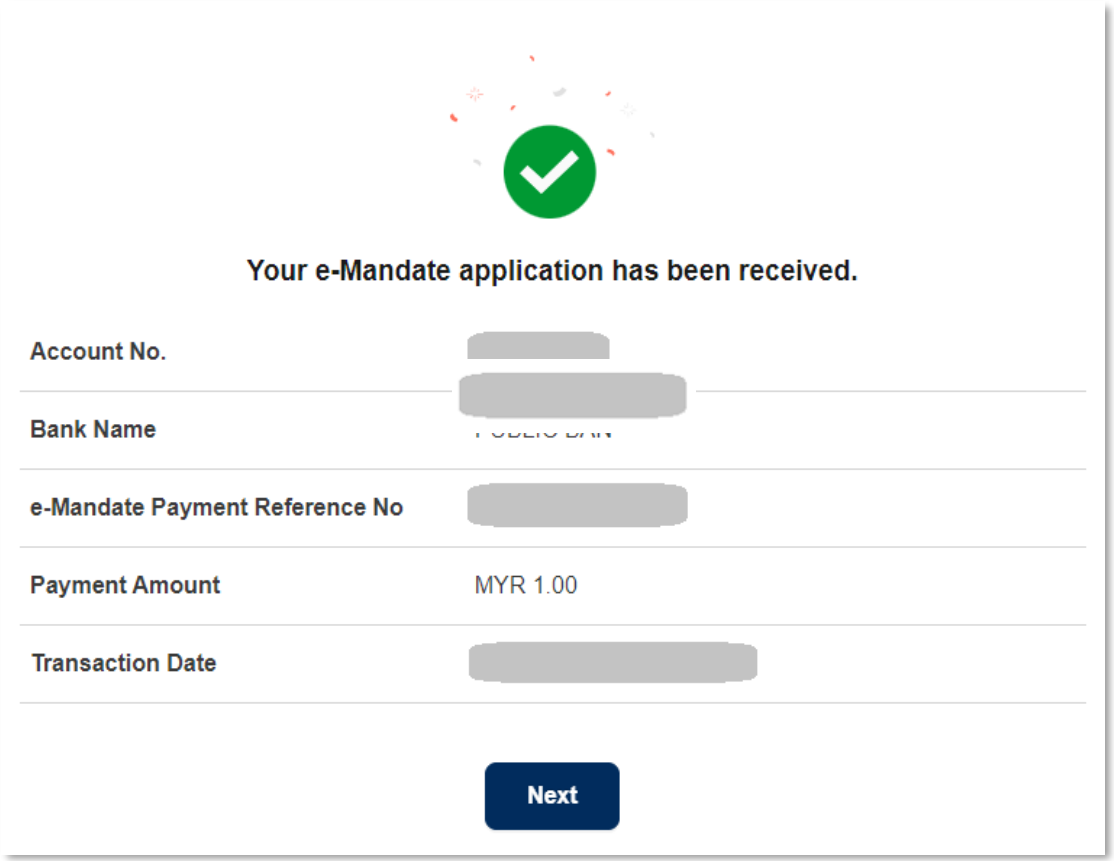
Note:

- MYR 1.00 will be deducted from your bank account upon successful application, amendments and termination.
- However, the amount will be refunded to your bank account in 7 business days.
- Bank will deduct payment from your bank account 4 business days before the 15th of every month or the next business day if the 15th is a non-business day.

Amend FPX e-Mandate on FSMOne

➲ Step 5

- Upon completing MYR 1.00 payment, your e-Mandate application will display the received status.



Amend FPX e-Mandate on FSMOne

➲ Step 6

- Upon completing MYR 1.00 payment, your e-Mandate application will display the received status.

Type	Bank Name	Account No	Maximum Amt.	Used Amt.	Available Amt.	Create Date	Funds/MP	Status	Action
e-Mandate	Maybank		MYR 30,000.00	MYR 0.00	MYR 30,000.00	21 Feb 2023		Received	Go To

Amend FPX e-Mandate on FSMOne

➲ Step 7

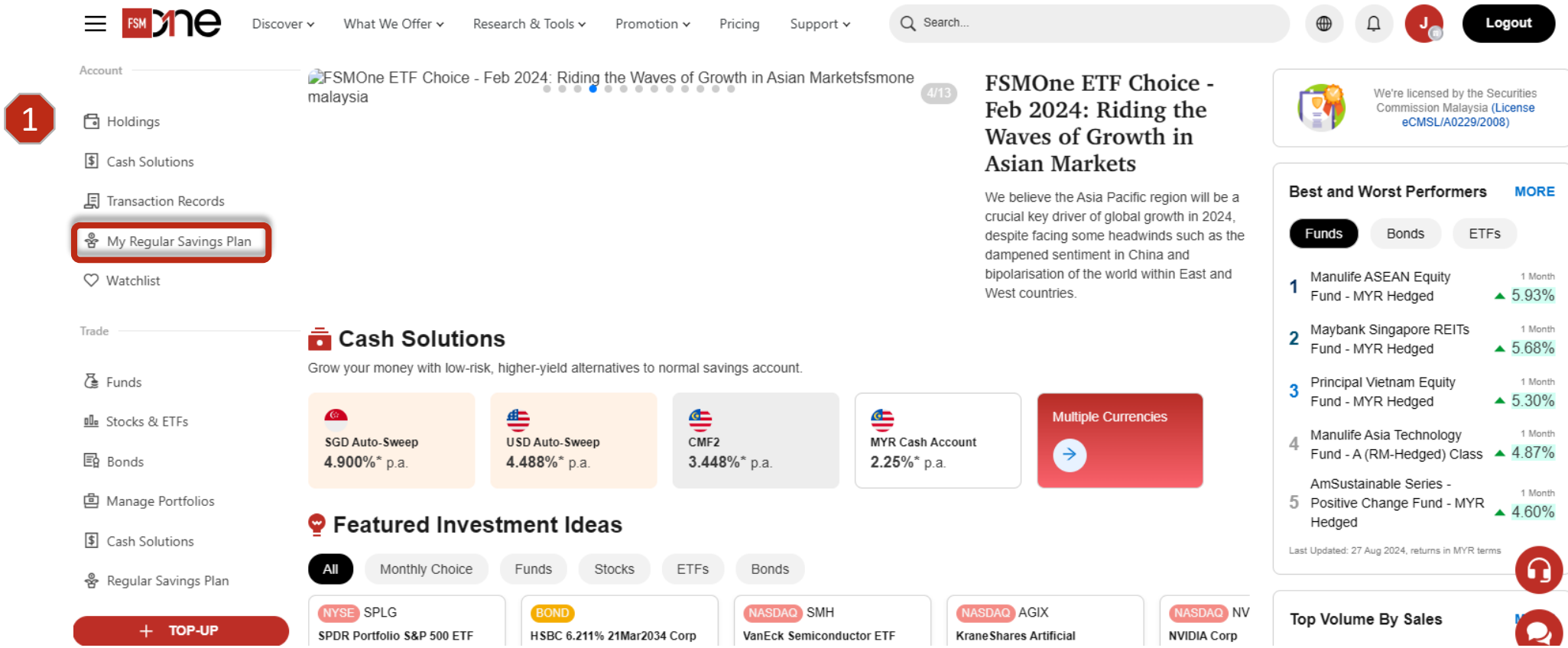
- The FPX e-Mandate application will take T+4 business days to process by the bank, and an email will send to notify you once the bank has approved the application.
- In your investment account, you may also check the approved application status display as Active.



Terminate FPX e-Mandate on FSMOne

Step 1

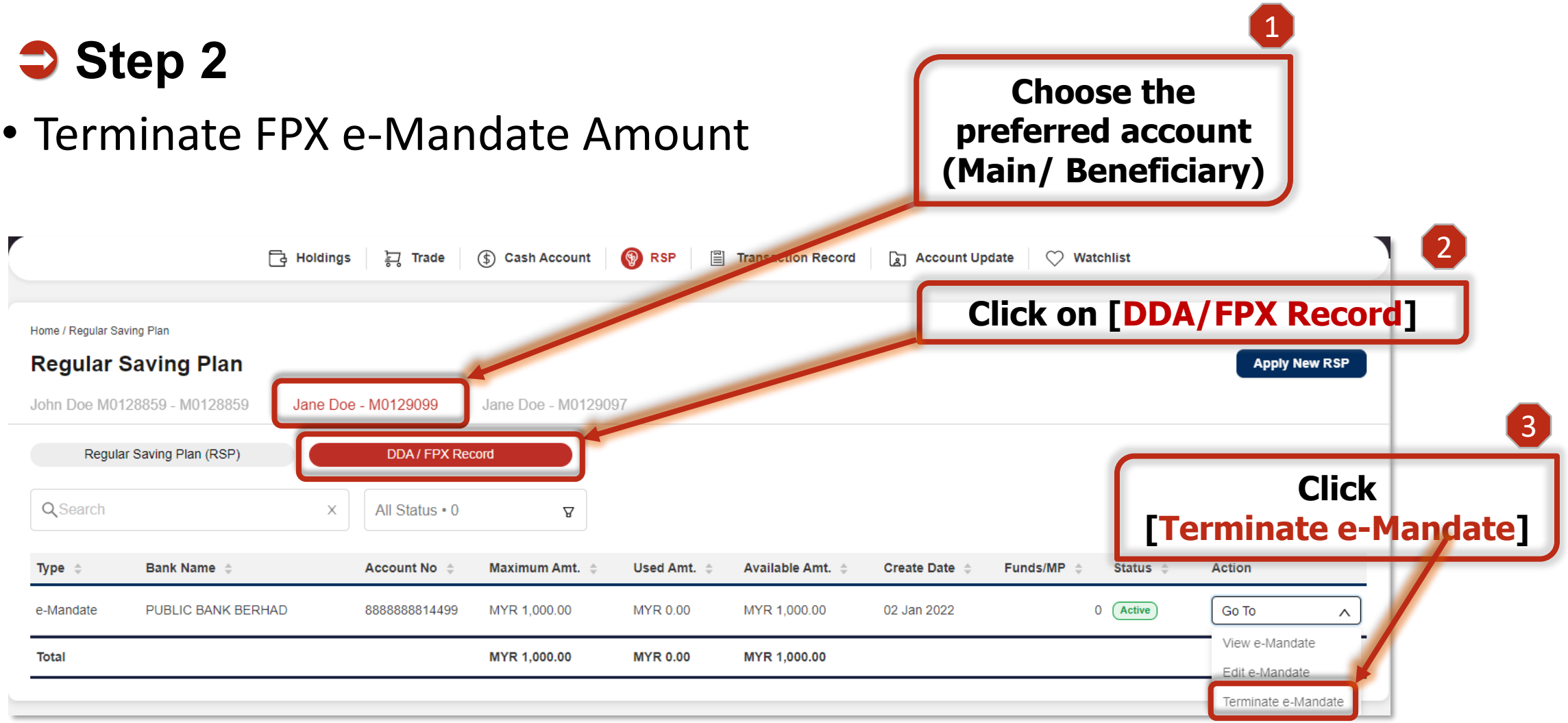
- **Click on [My Regular Savings Plan]**



Terminate FPX e-Mandate on FSMOne

Step 2

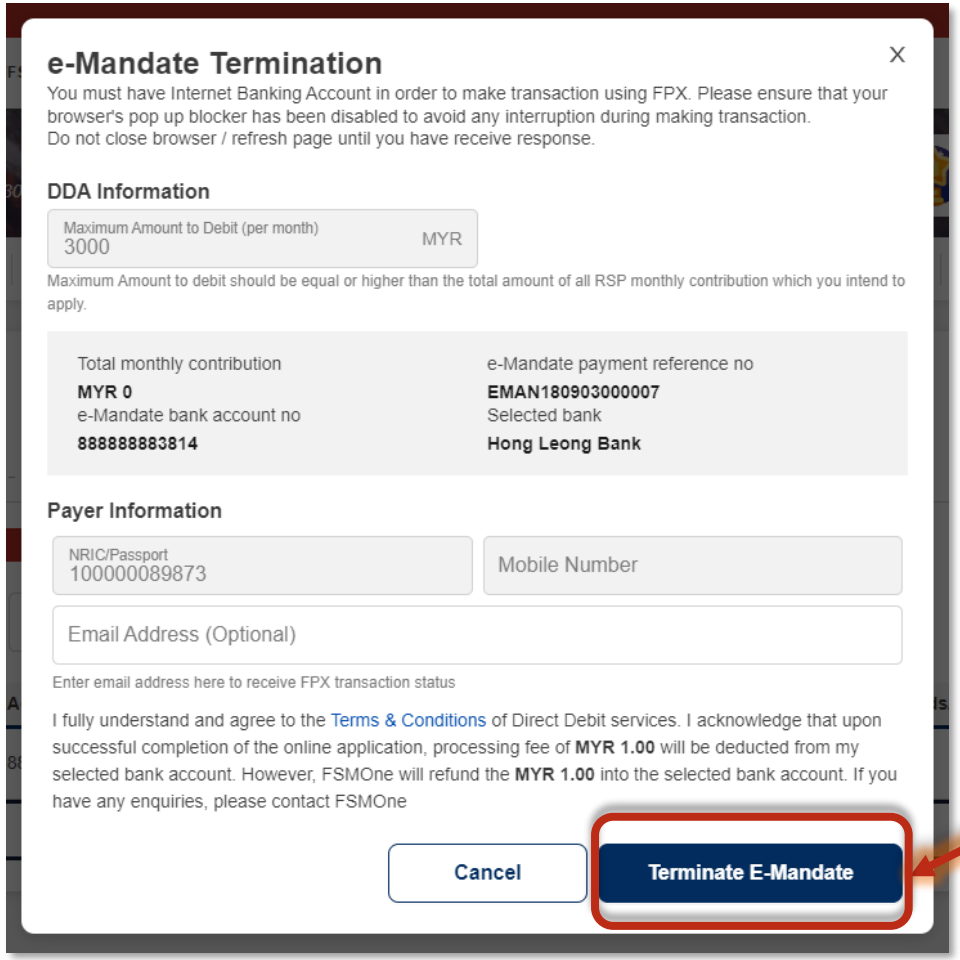
- Terminate FPX e-Mandate Amount



- Note: To accommodate the deduction and transaction processes, request for a change of amount or termination received between 8th to 18th of the month will only take effect on the following month.

Terminate FPX e-Mandate on FSMOne

- **Step 3**

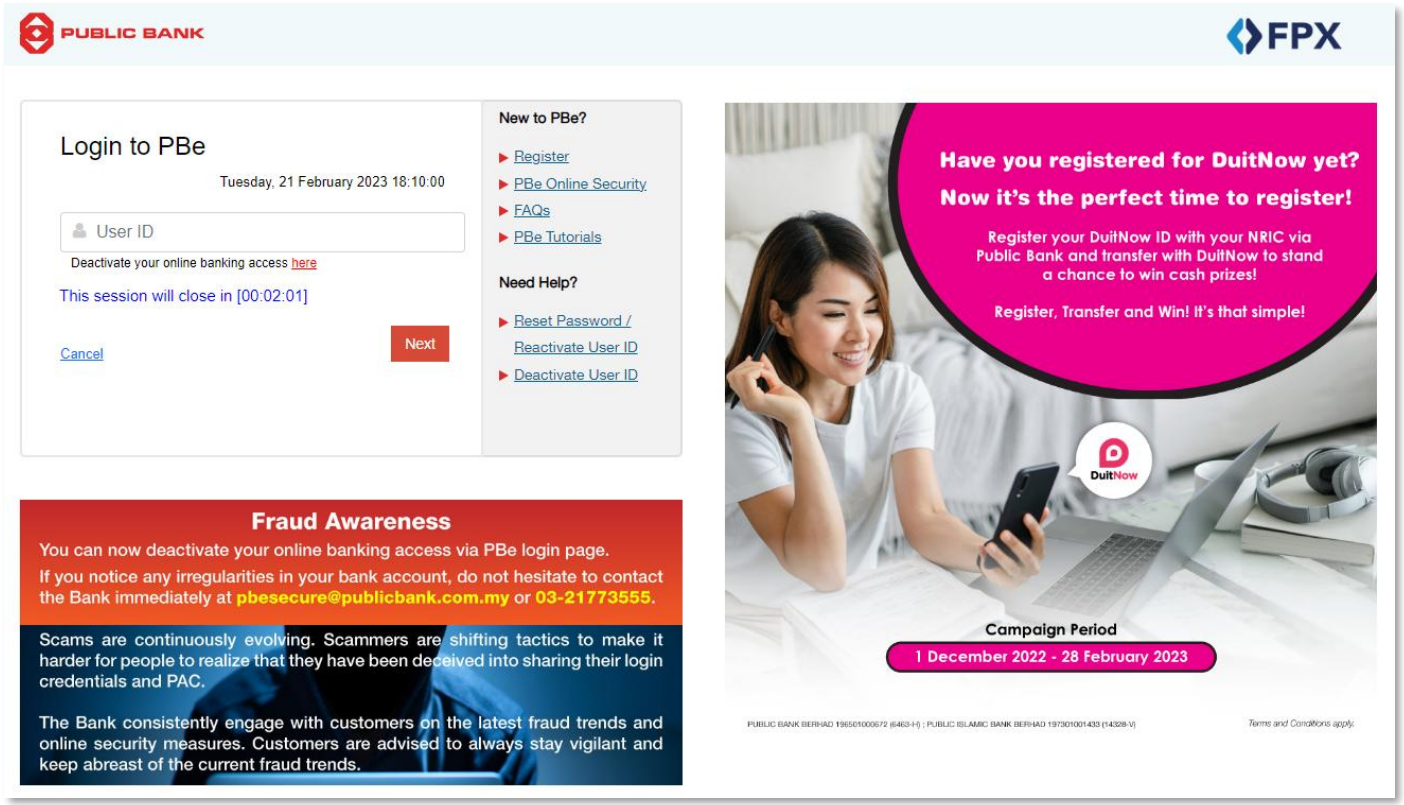


Click [Terminate E-Mandate]

Terminate FPX e-Mandate on FSMOne

➲ Step 4

- It will redirect you to the respective bank's website. Please login and proceed accordingly.



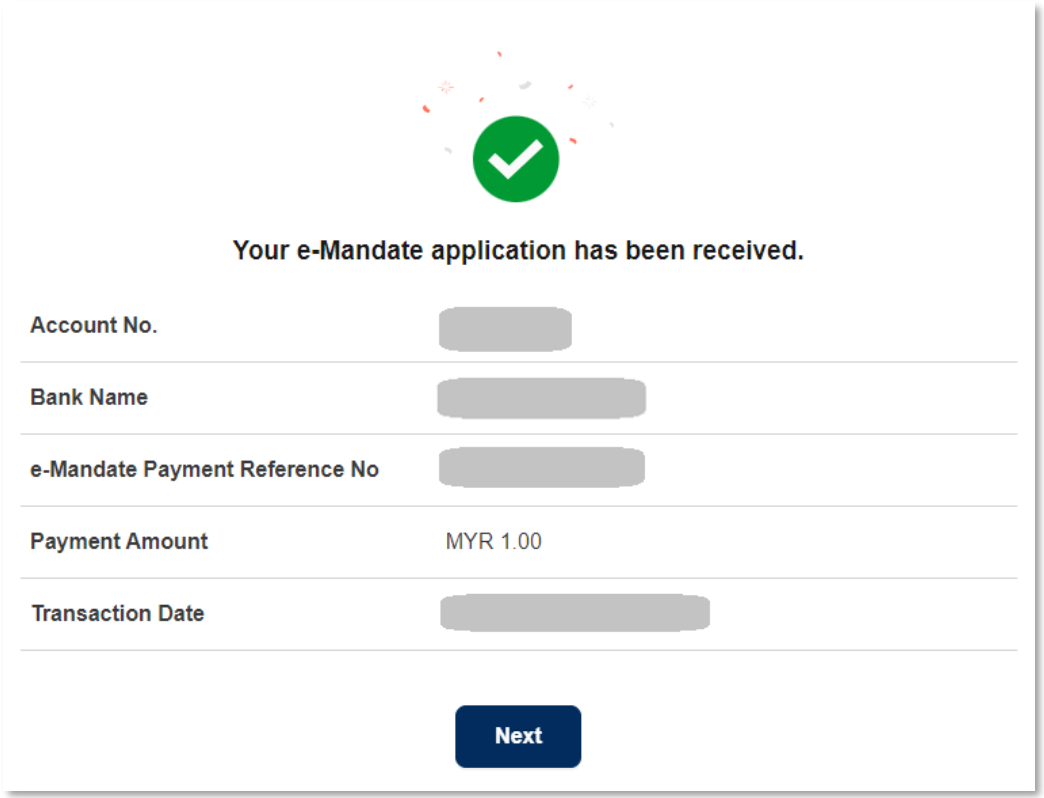
Note:

- MYR 1.00 will be deducted from your bank account upon successful application, amendments and termination.
- However, the amount will be refunded to your bank account in 7 business days.
- Bank will deduct payment from your bank account 4 business days before the 15th of every month or the next business day if the 15th is a non-business day.

Terminate FPX e-Mandate on FSMOne

➲ Step 5

- Upon completing MYR 1.00 payment, your e-Mandate application will display the received status.



Terminate FPX e-Mandate on FSMOne

➲ Step 6

- The FPX e-Mandate application will take T+4 business days to process by the bank, and an email will send to notify you once the bank has approved the application.
- In your investment account, you may also check the approved application status display as Terminated.

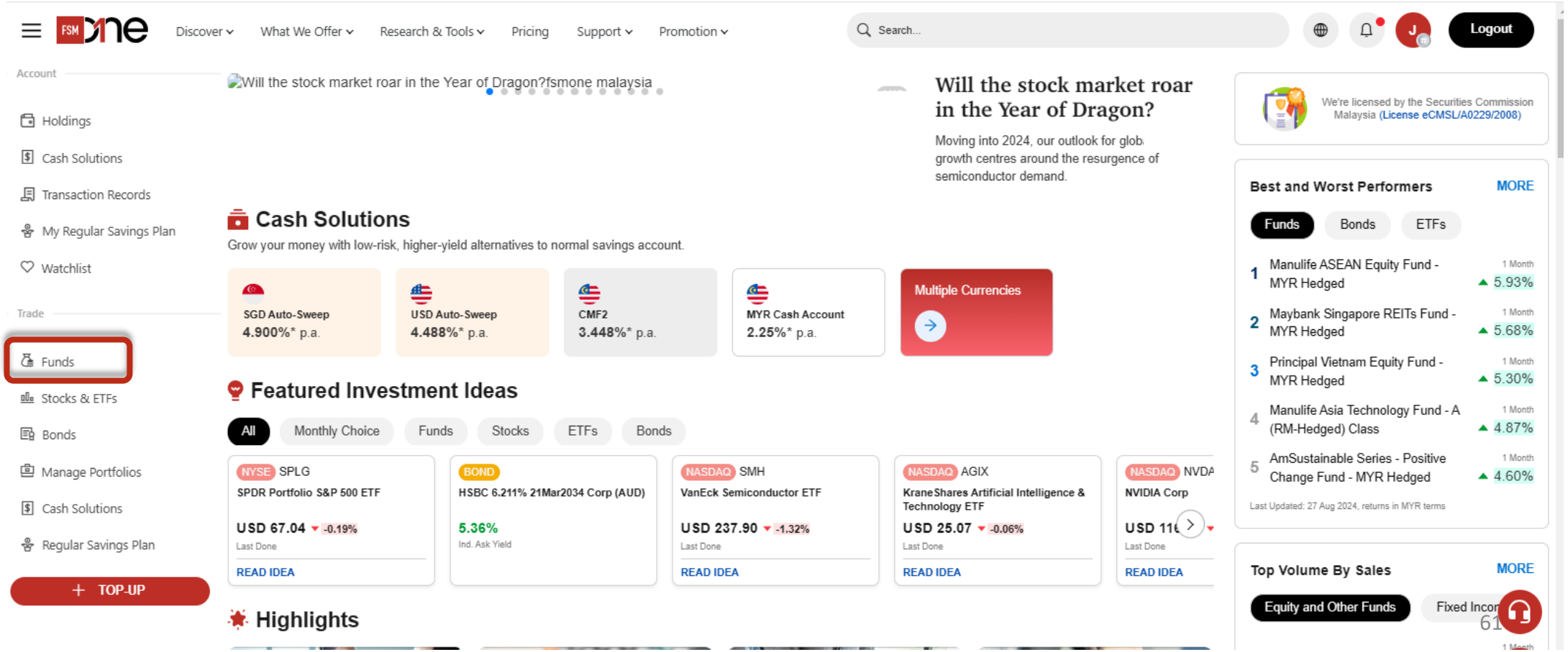
FSMOne step by step guide

Unit Trust Funds Buying

Buying unit trust funds on FSMOne

➲ Step 1

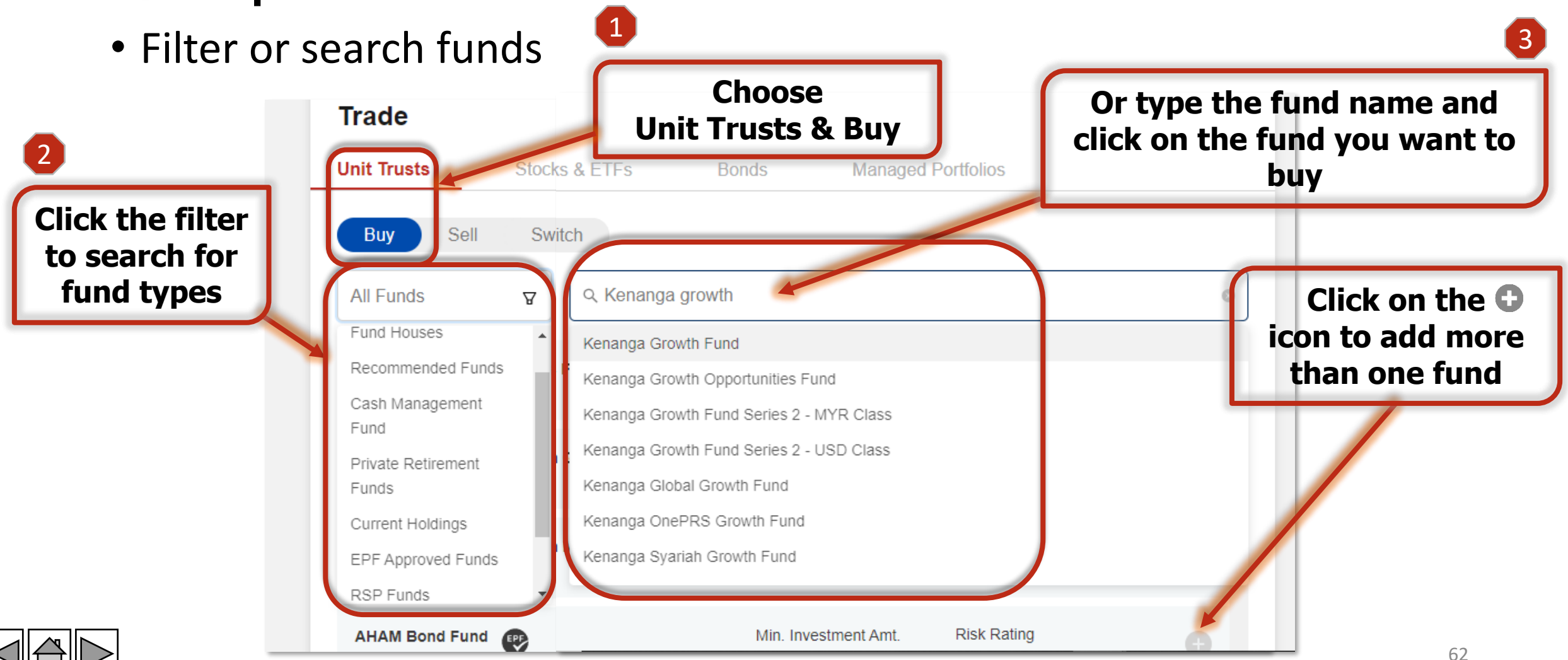
- **Click on [Funds]**



Buying unit trust funds on FSMOne

➲ Step 2

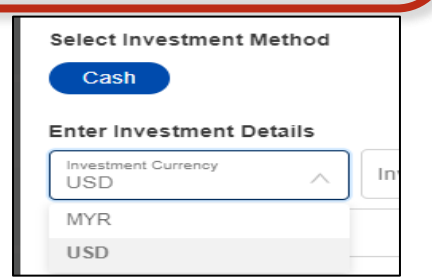
- Filter or search funds



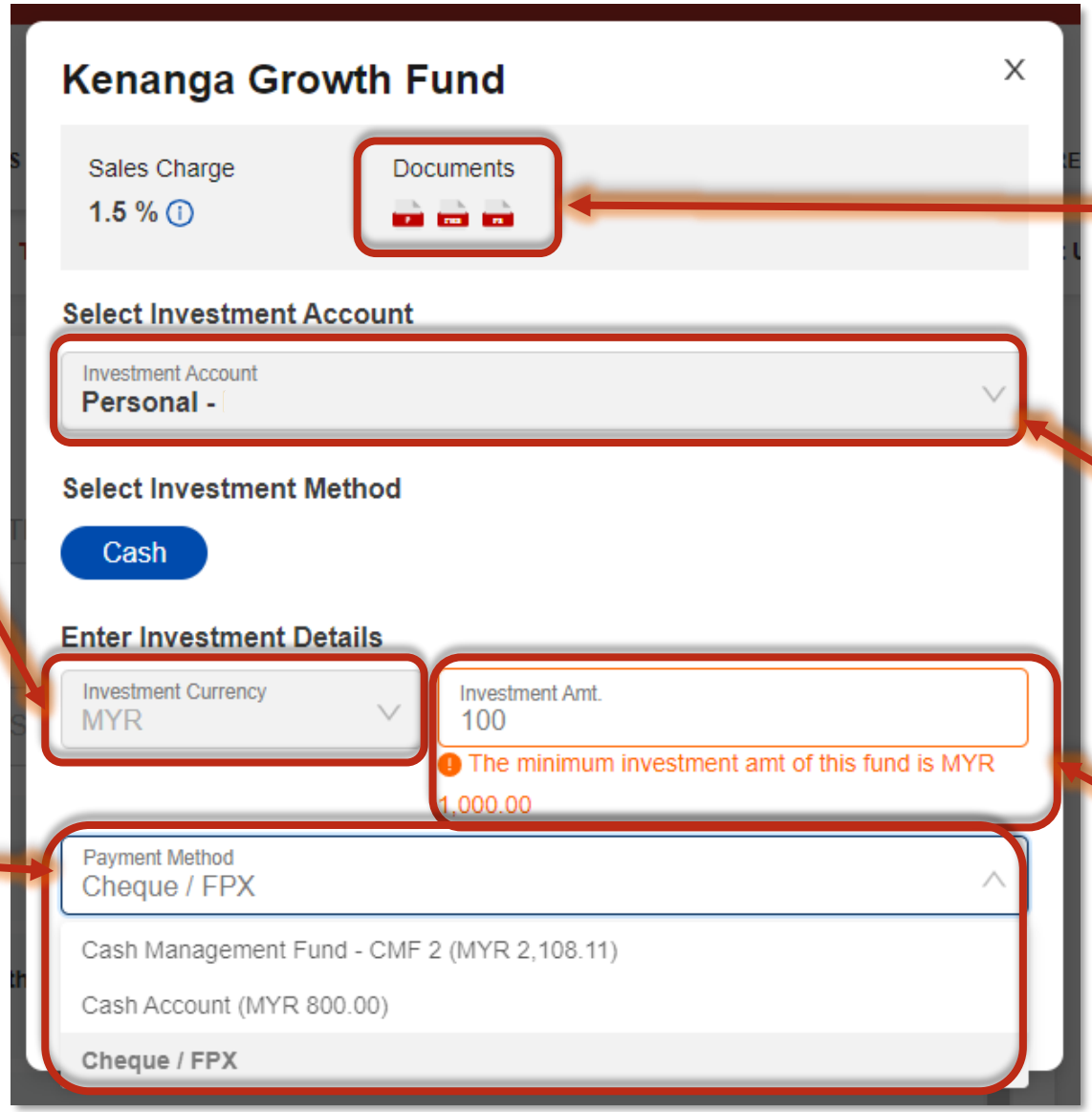
Buying unit trust funds on FSMOne

➲ Step 3

Investment currency will default the currency of the fund.
For Foreign currency fund, will have the option to the Fund default currency or MYR



Select a payment method
- **USD AUTO SWEEP**
- **CMF**
- **Cash Account**
- **Cheque/FPX**



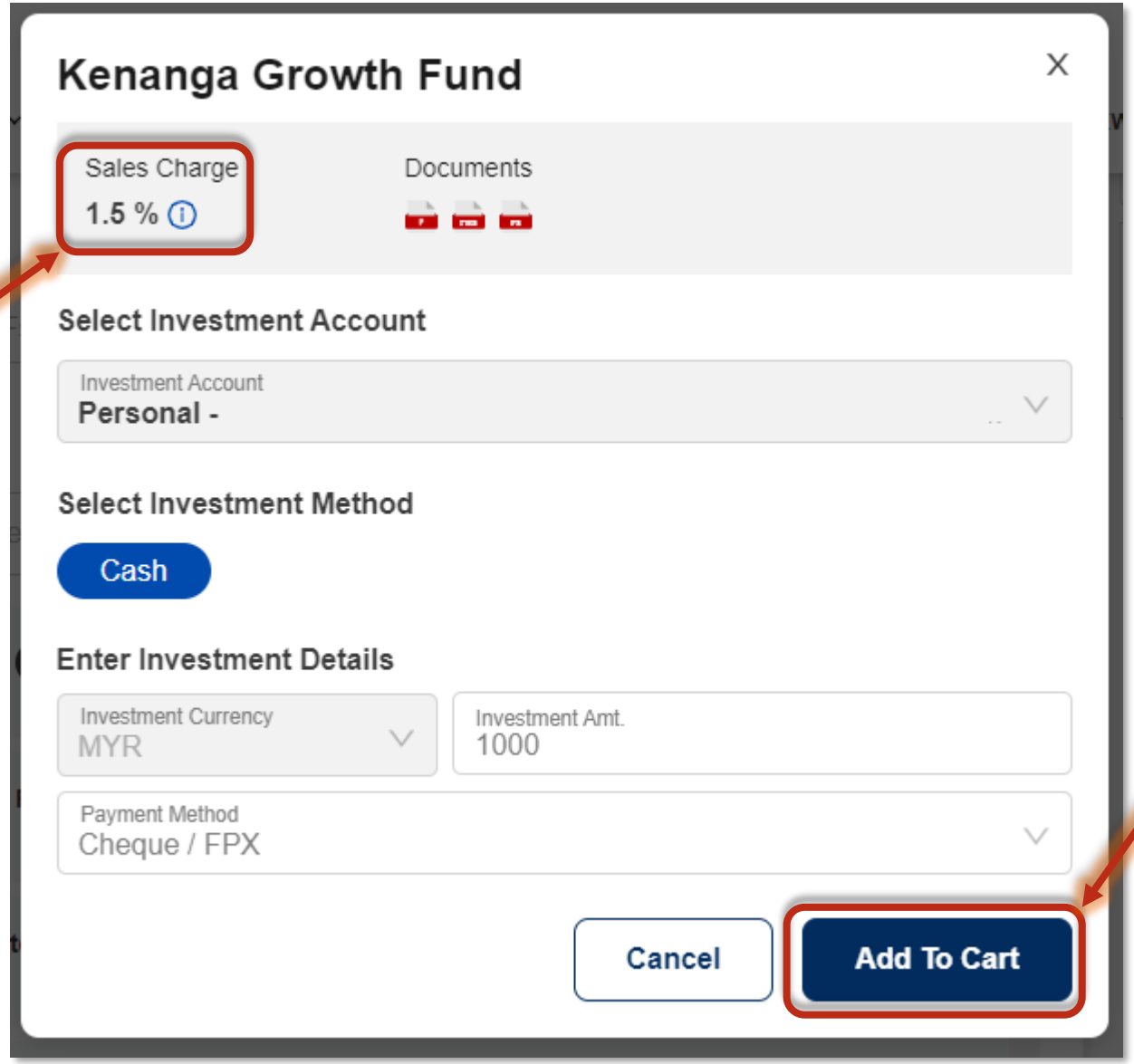
Click to view Prospectus, product highlight sheets and fund factsheet

Confirm the Investment Account; Personal or Beneficiary

Confirm the minimum Investment Amt

Buying unit trust funds on FSMOne

Step 4



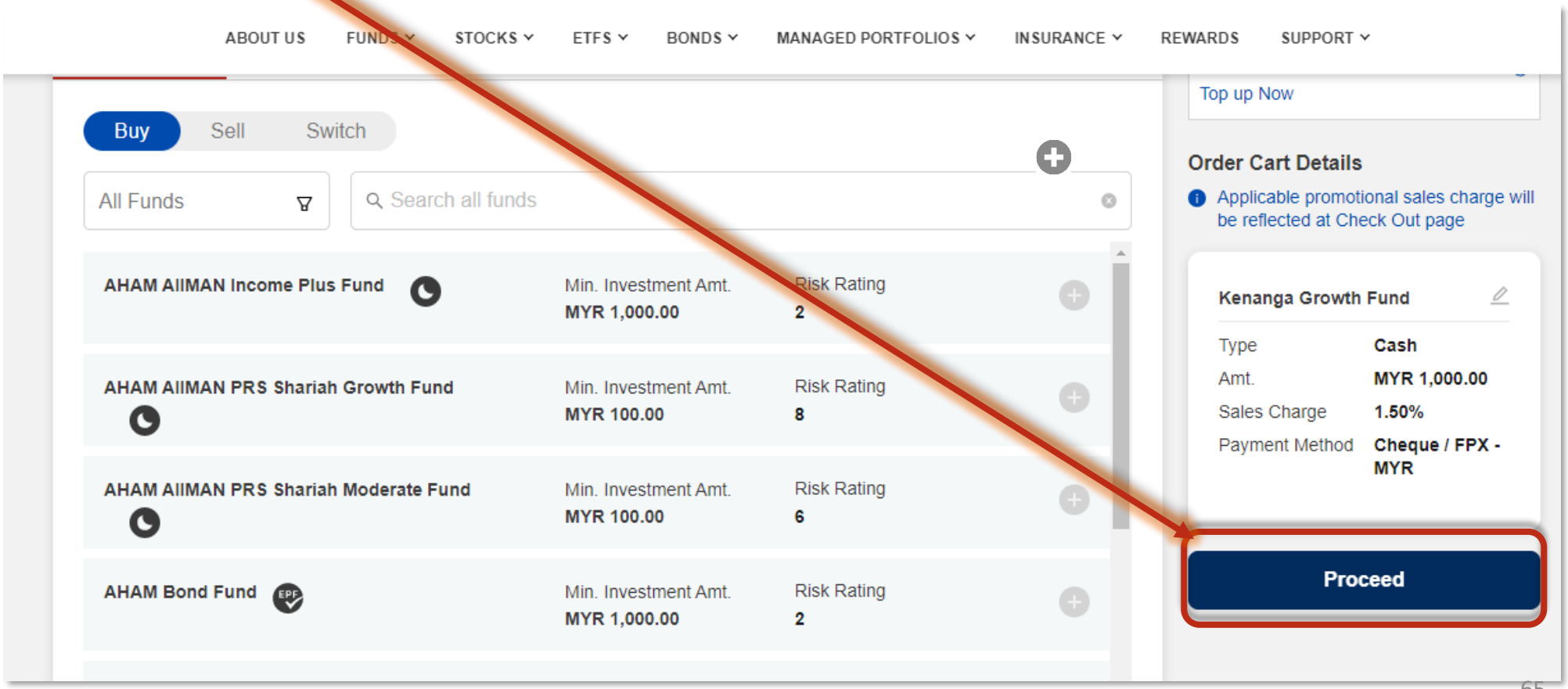
Applicable promotional sales charge will be reflected at Check Out page

Click [Add to Cart]

Buying unit trust funds on FSMOne

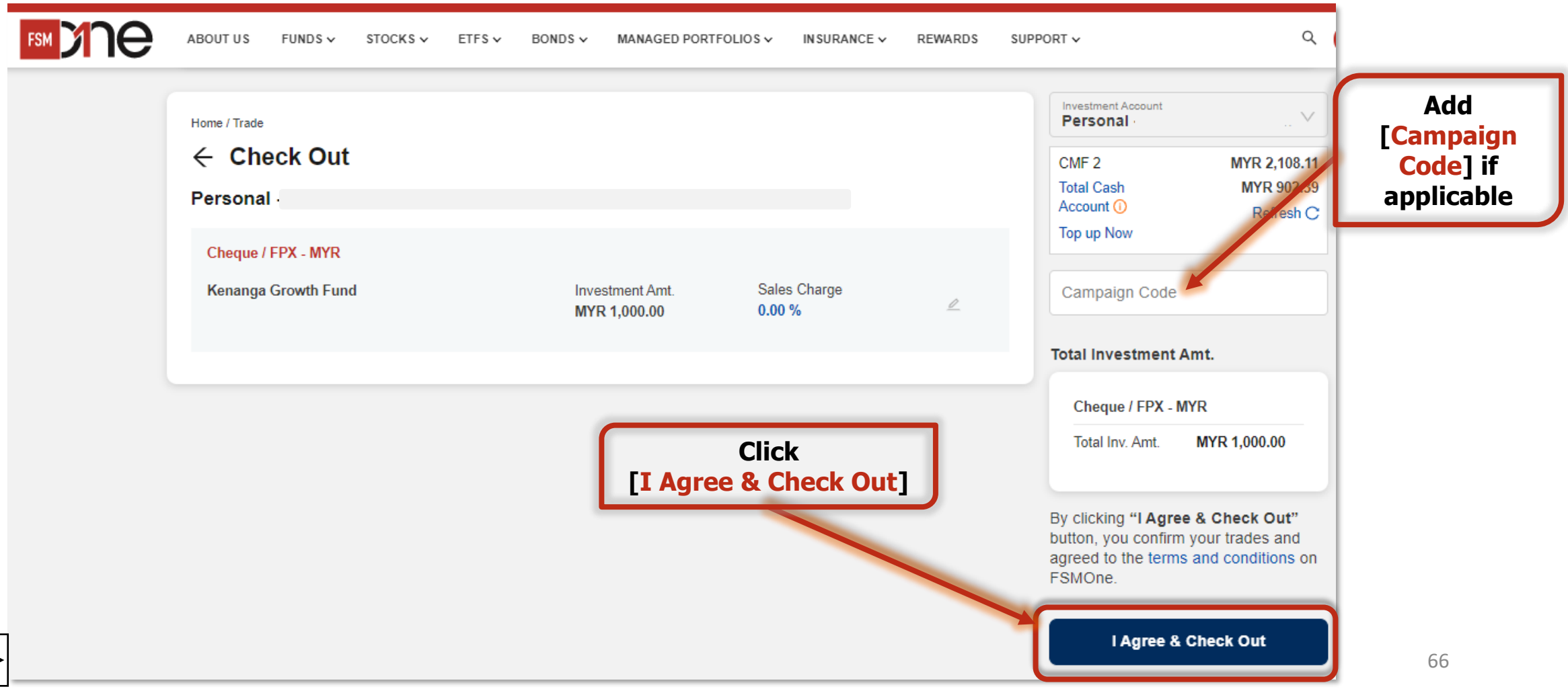
➲ Step 5

- Click [**Proceed**]



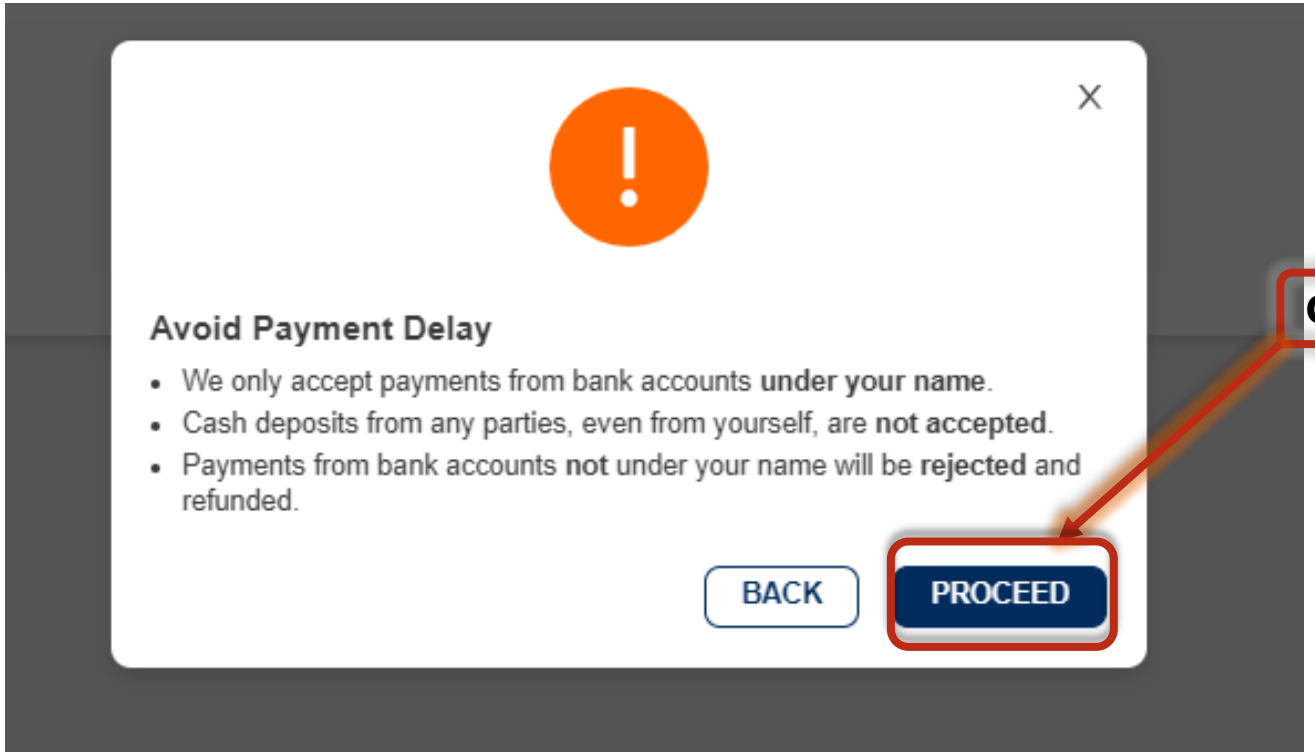
Buying unit trust funds on FSMOne

Step 6a



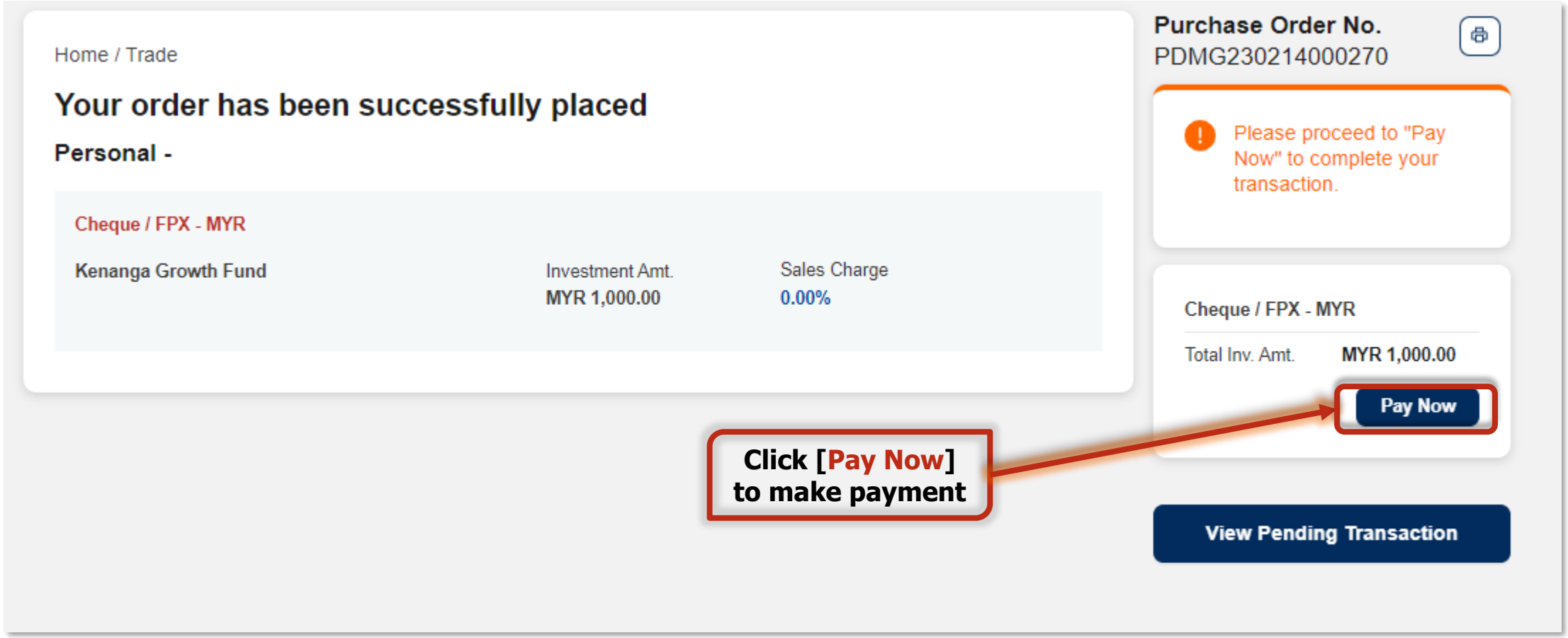
Buying unit trust funds on FSMOne

- Step 6b



Buying unit trust funds on FSMOne

➲ Step 7

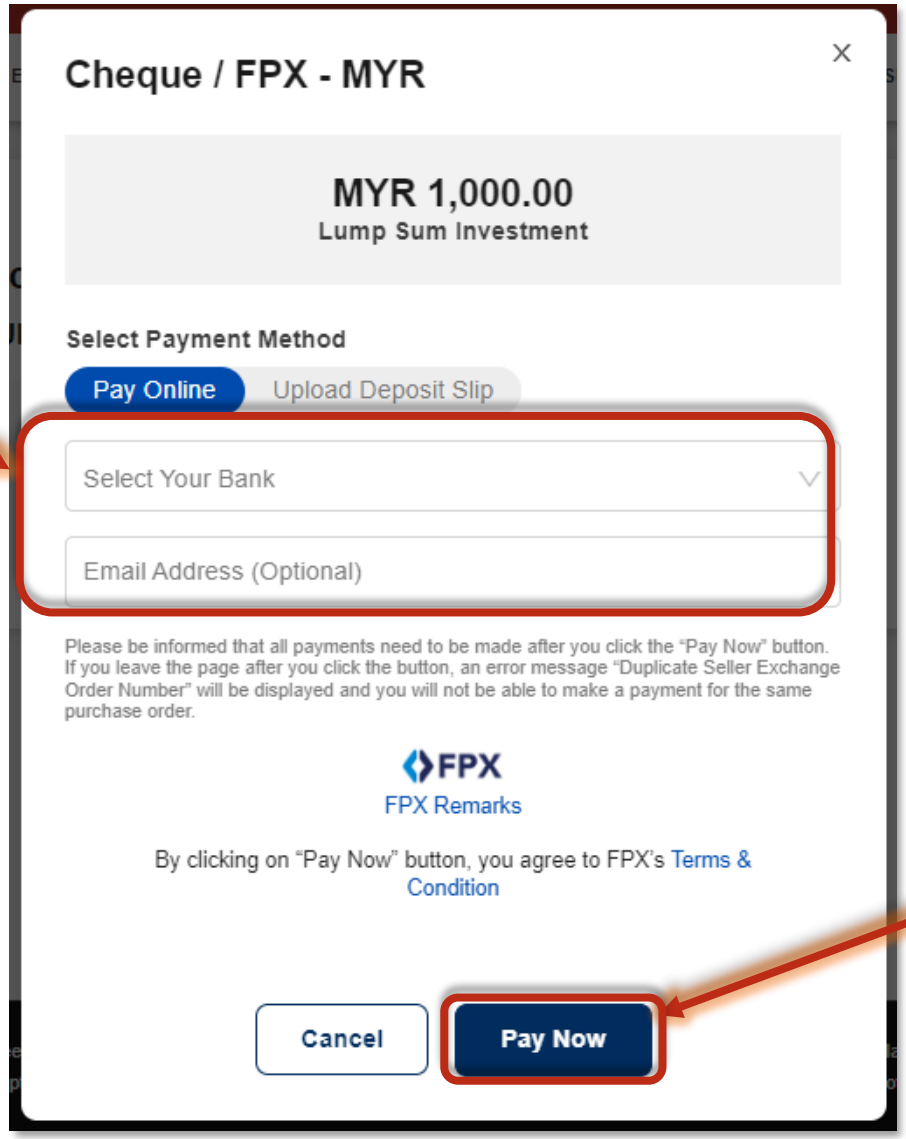


Buying unit trust funds on FSMOne

➲ Step 8

1

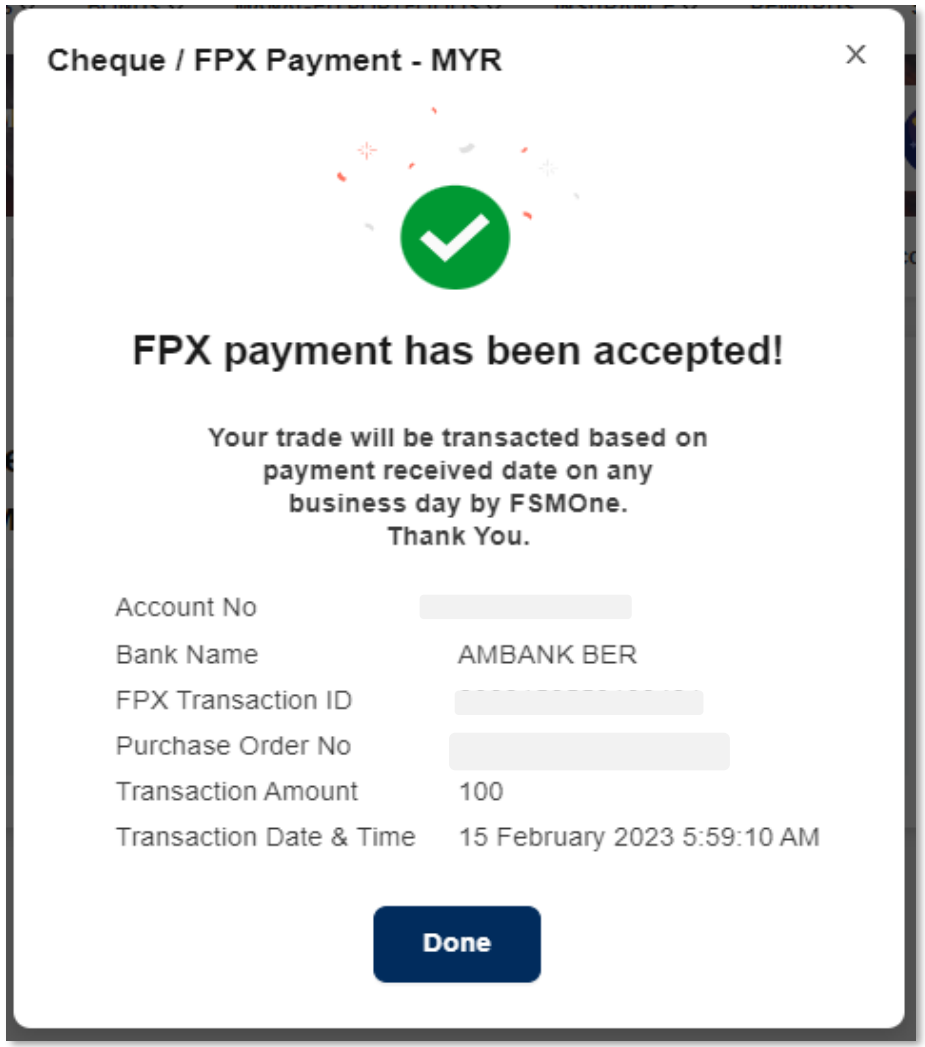
Enter Bank Details



2

Click [Pay Now] to make payment

Buying unit trust funds on FSMOne



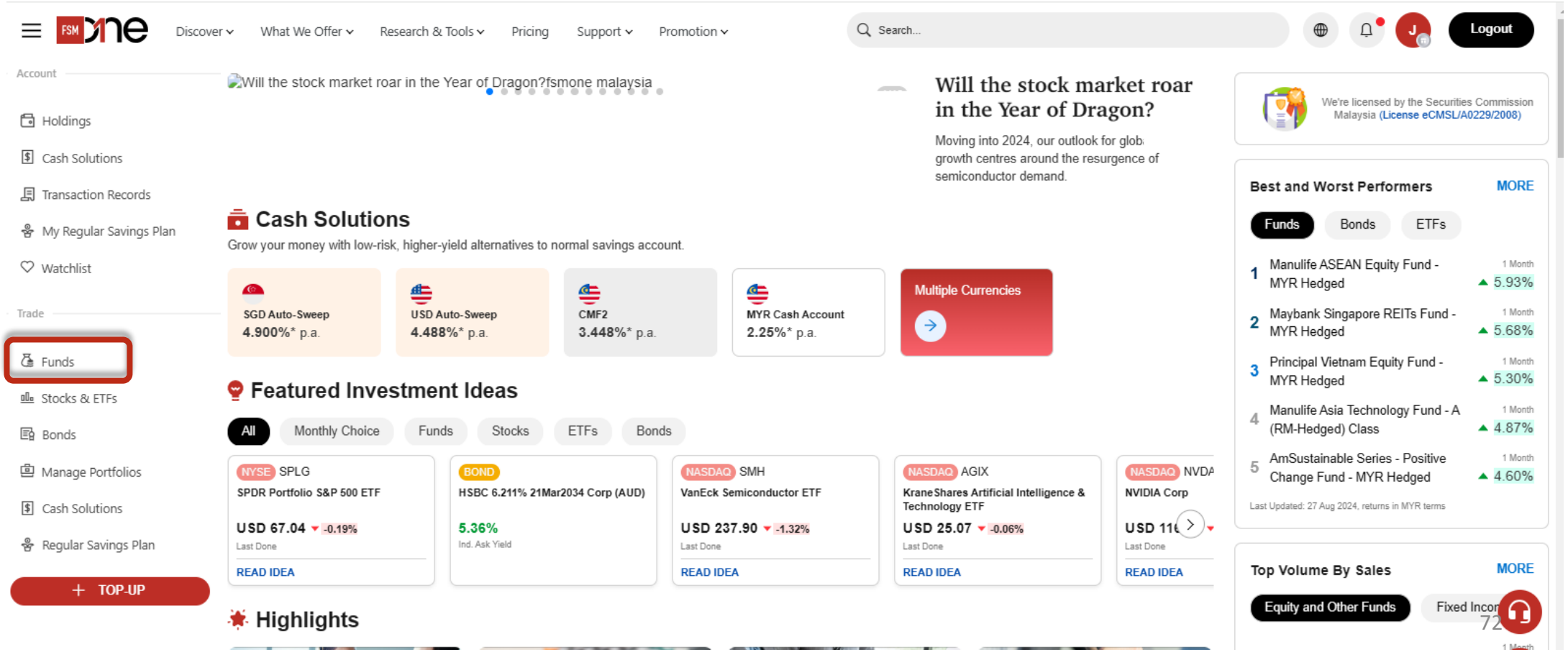
FSMOne step by step guide

Unit Trust Funds Selling

Selling unit trust funds on FSMOne

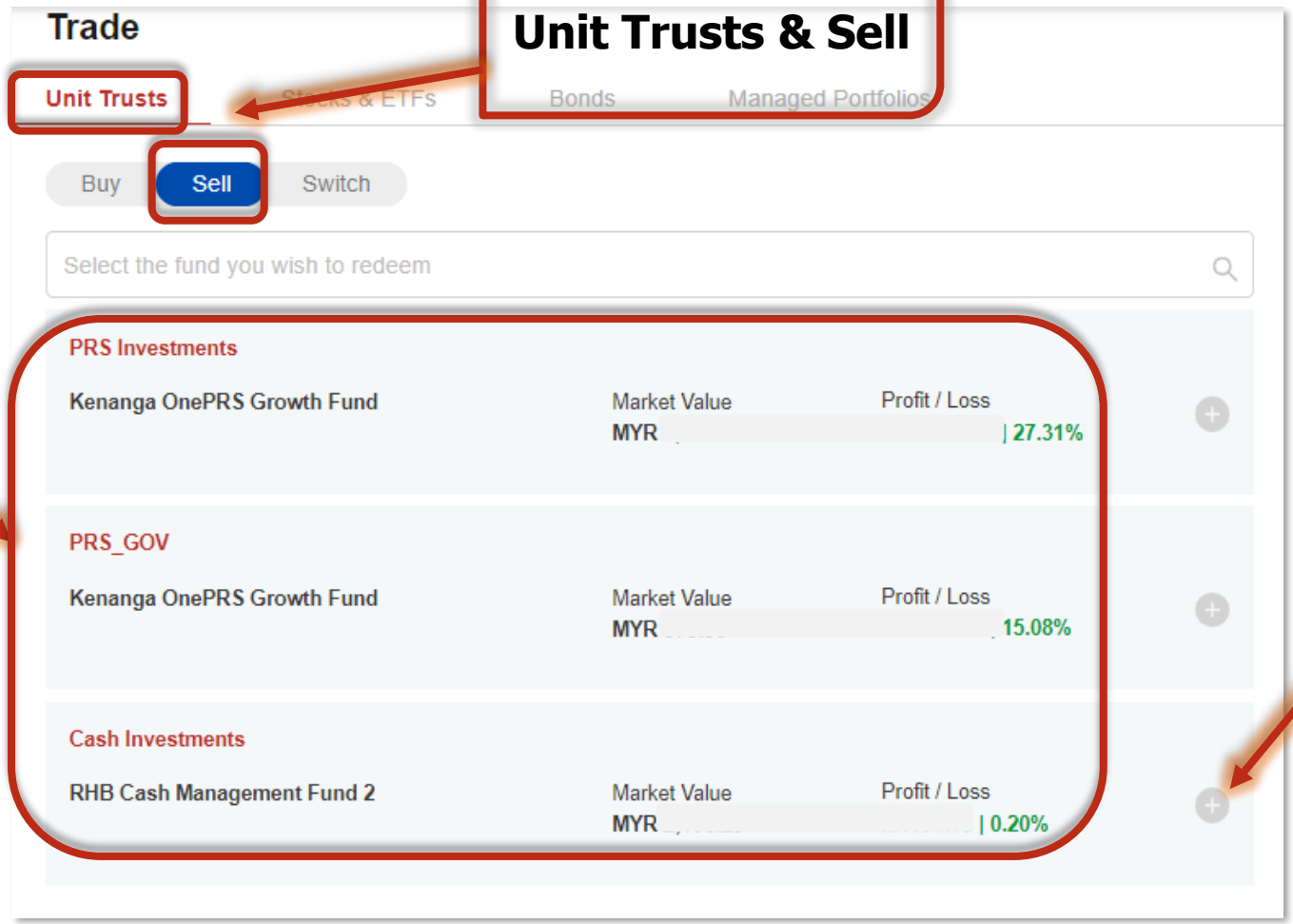
➲ Step 1

- **Click on [Funds]**



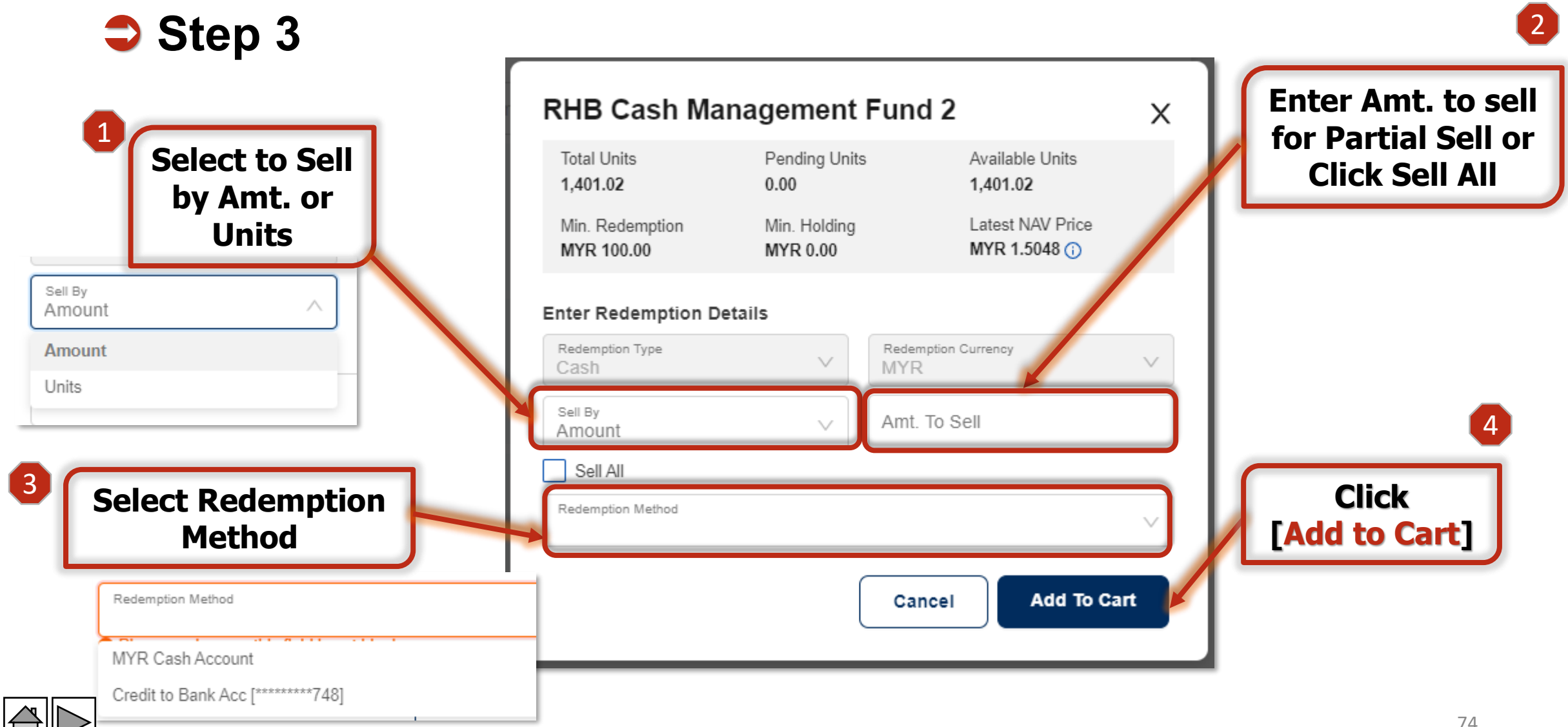
Selling unit trust funds on FSMOne

Step 2



Selling unit trust funds on FSMOne

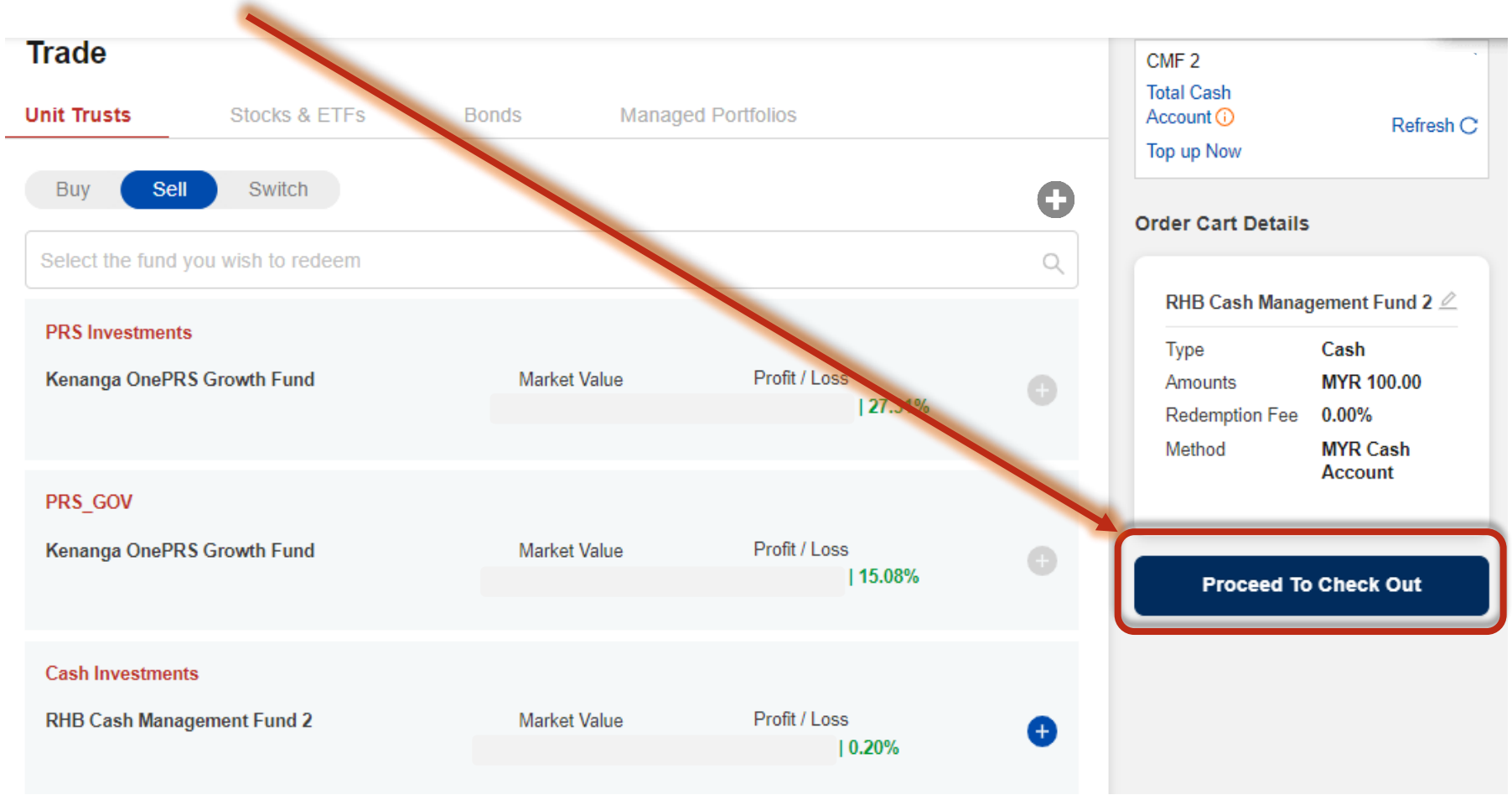
➲ Step 3



Selling unit trust funds on FSMOne

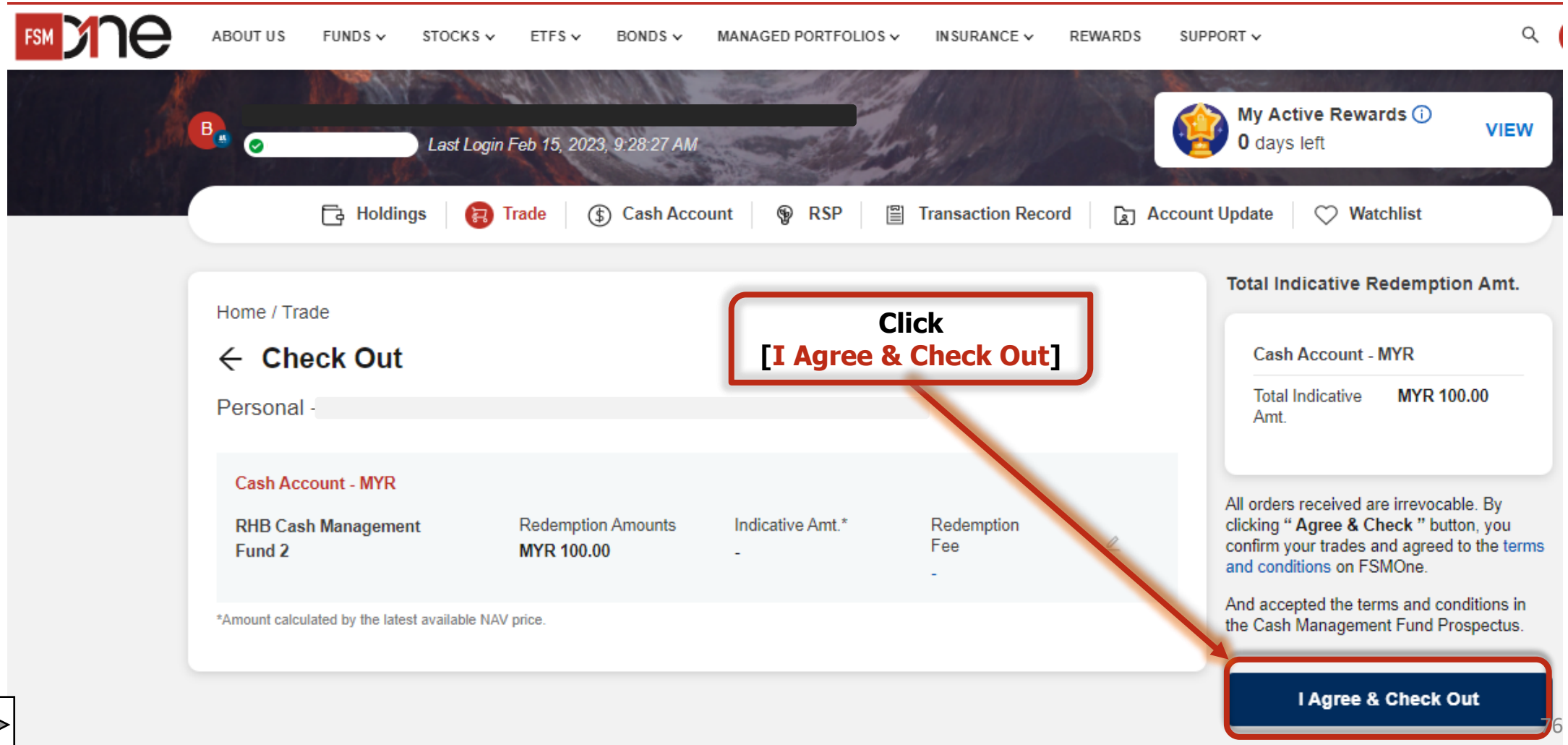
➲ Step 4

- Click [**Proceed To Check Out**]



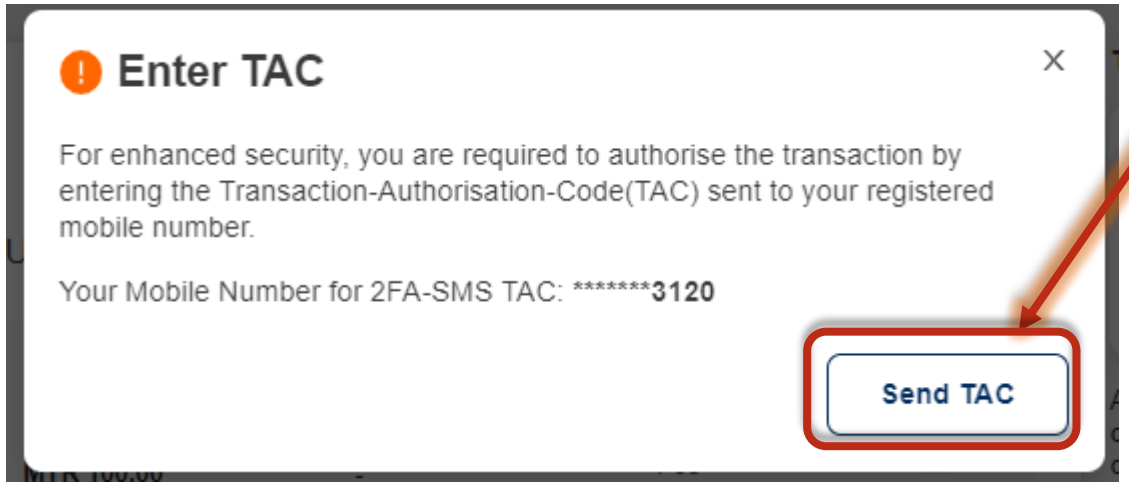
Selling unit trust funds on FSMOne

Step 5

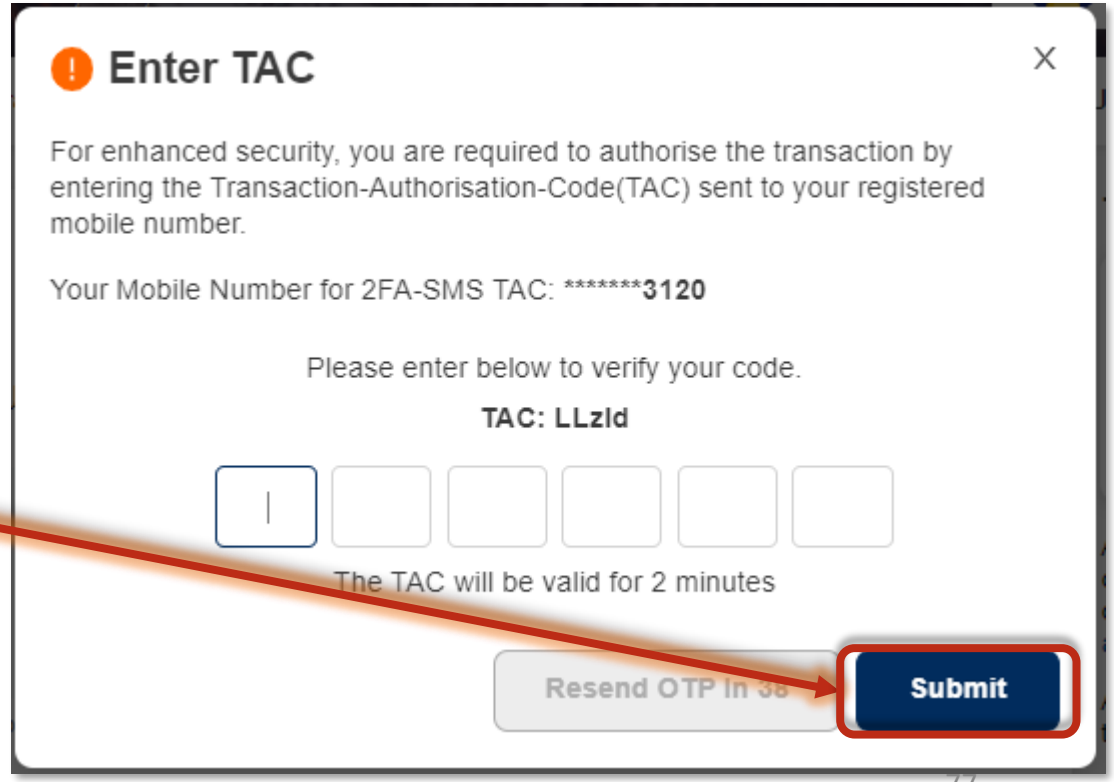


Selling unit trust funds on FSMOne

➲ Step 6



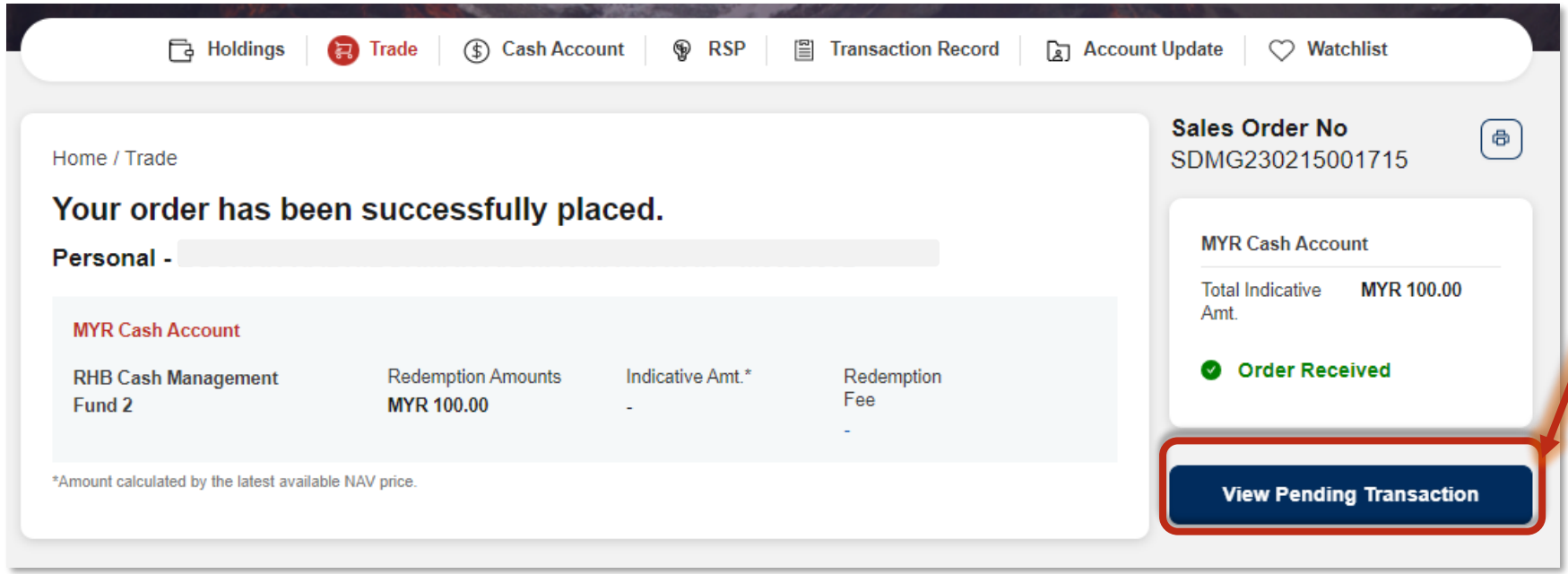
Click [Send TAC]



Enter TAC and Click [Submit]

Selling unit trust funds on FSMOne

- **Order is placed**



Click [View Pending Transactions] to check the order status

FSMOne step by step guide

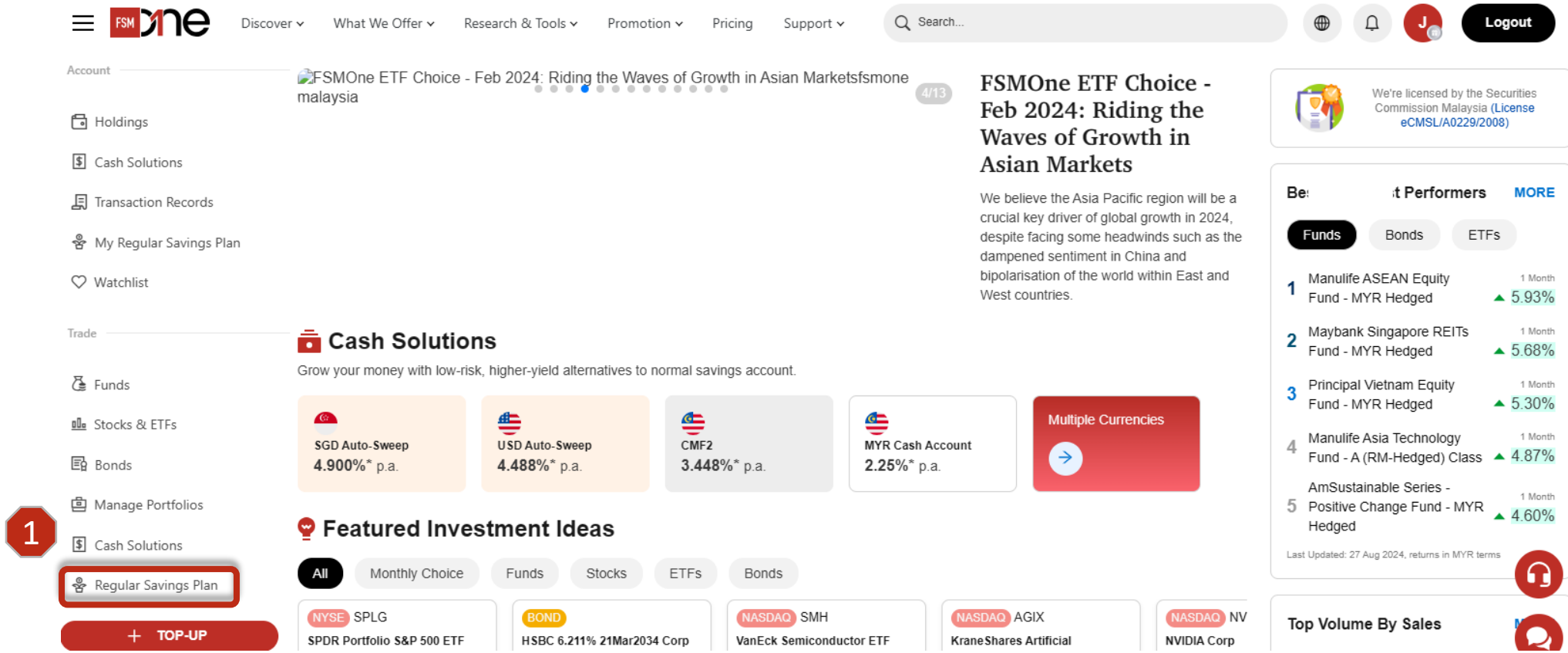
Unit Trust Fund

Regular Savings Plan (RSP)

RSP unit trust funds on FSMOne

Step 1

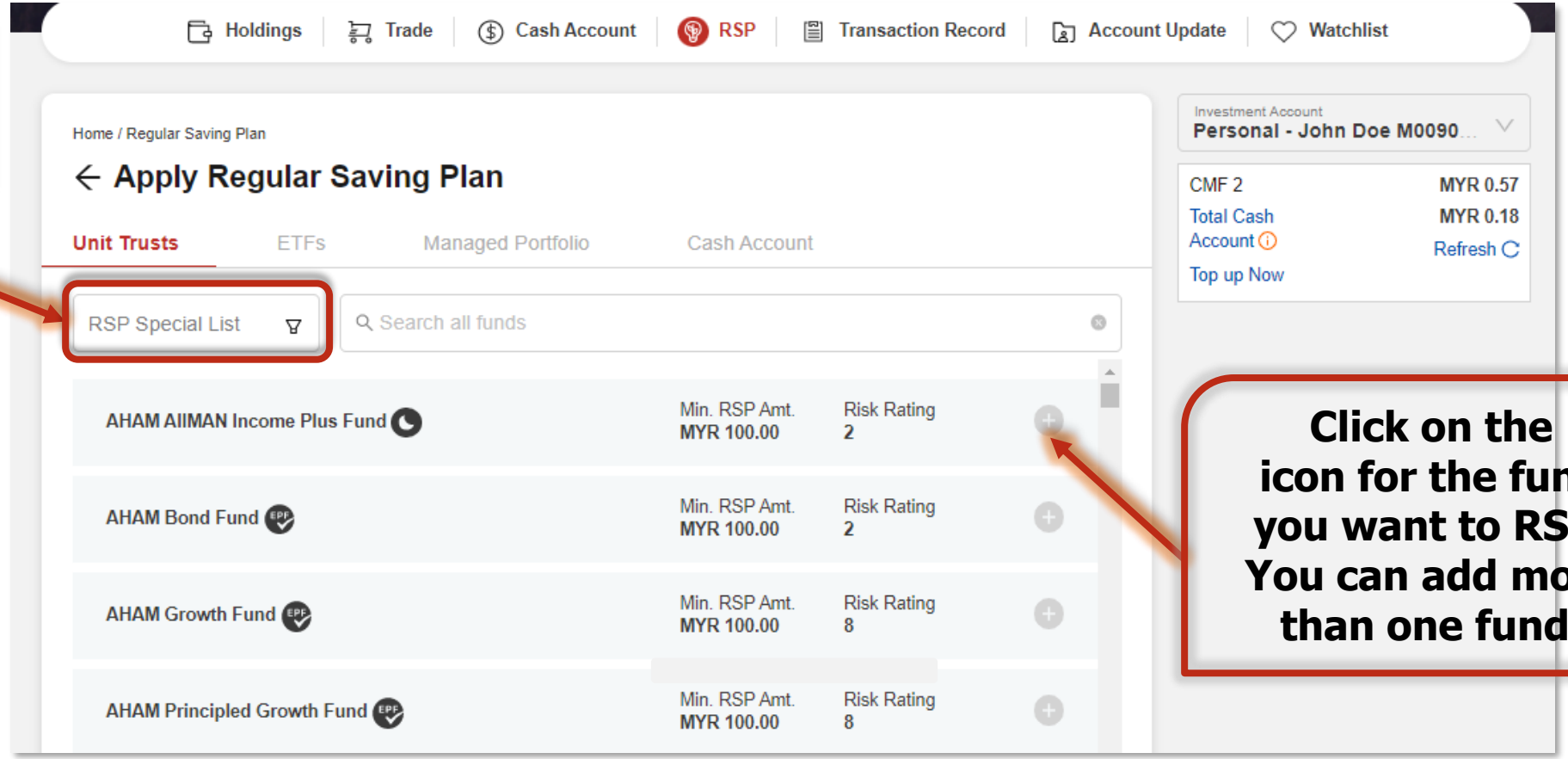
- **Click on [Regular Savings Plan]**



RSP unit trust funds on FSMOne

Step 2

RSP Special List filter is selected by default



Click on the ⊕ icon for the fund you want to RSP. You can add more than one fund.

RSP unit trust funds on FSMOne

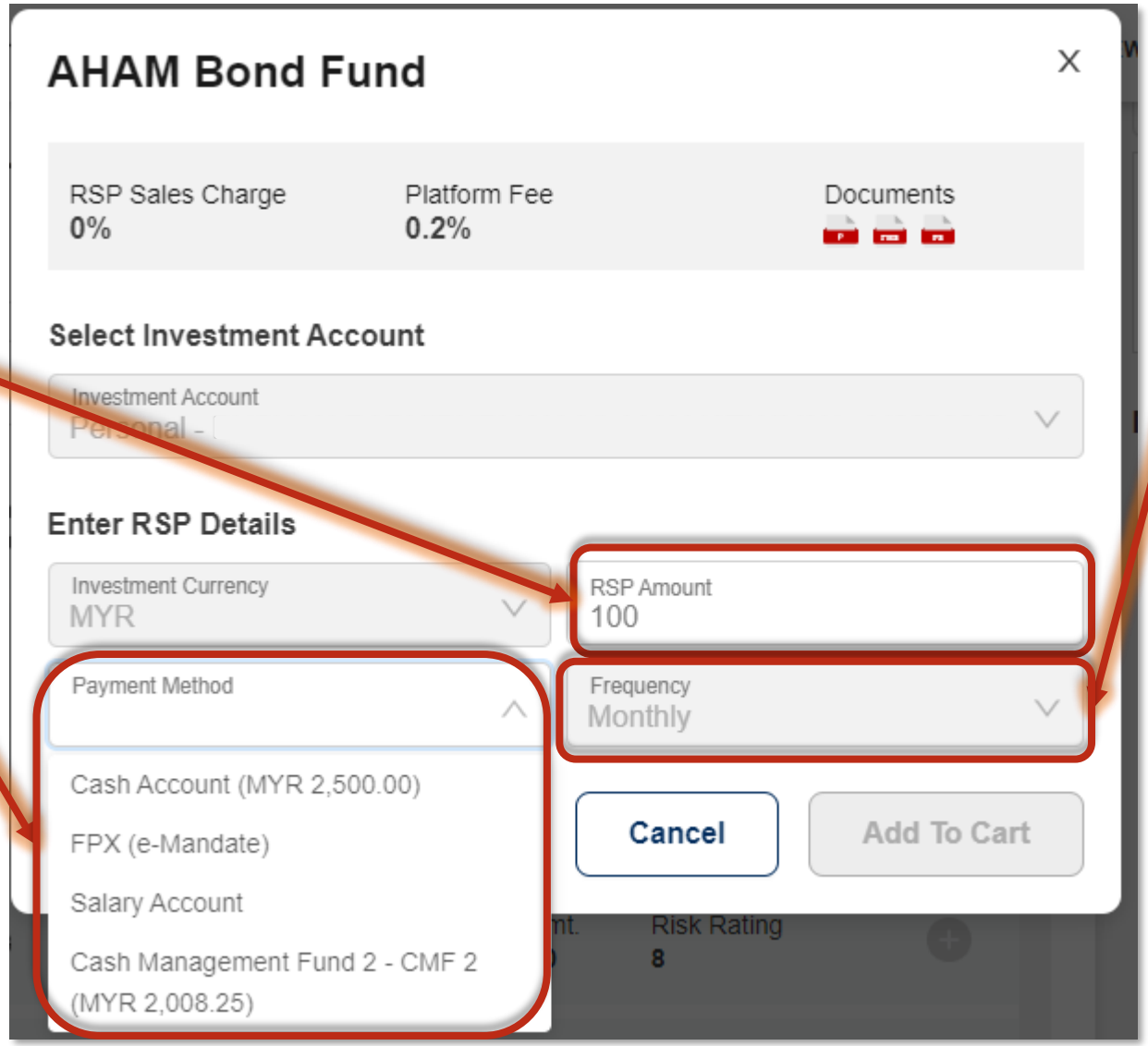
➲ Step 4

1

Select RSP Amount

2

Select Payment Method



3

Select Frequency

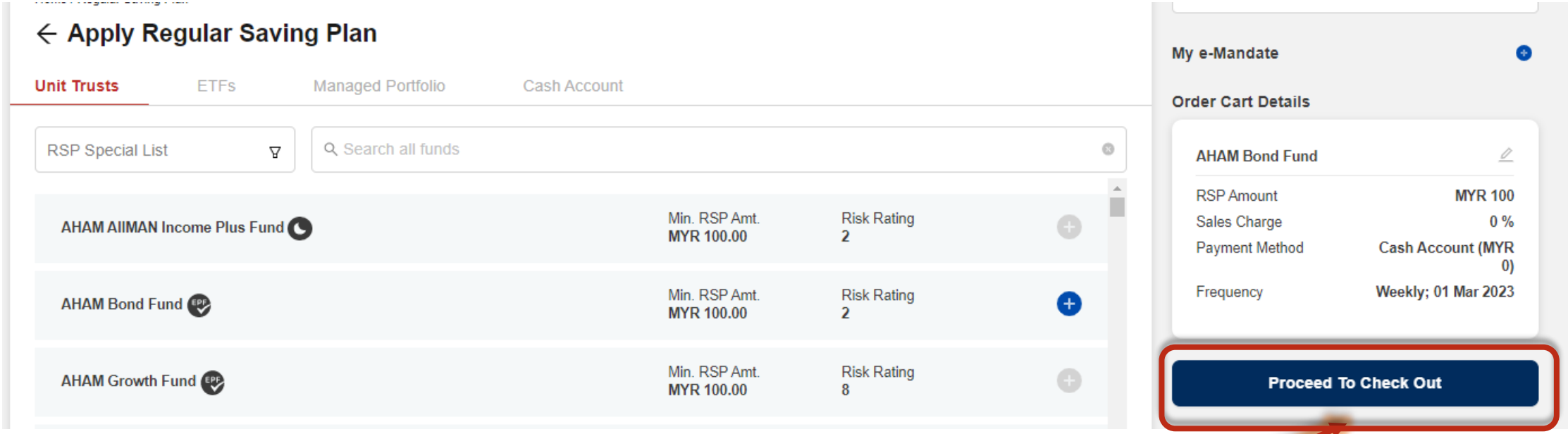
- **For Cash Account & CMF**
  Monthly, Weekly, Bi-Weekly
- **For FPX & Salary Account**
  Monthly Only

4

Click [Add to Cart]

RSP unit trust funds on FSMOne

➲ Step 5

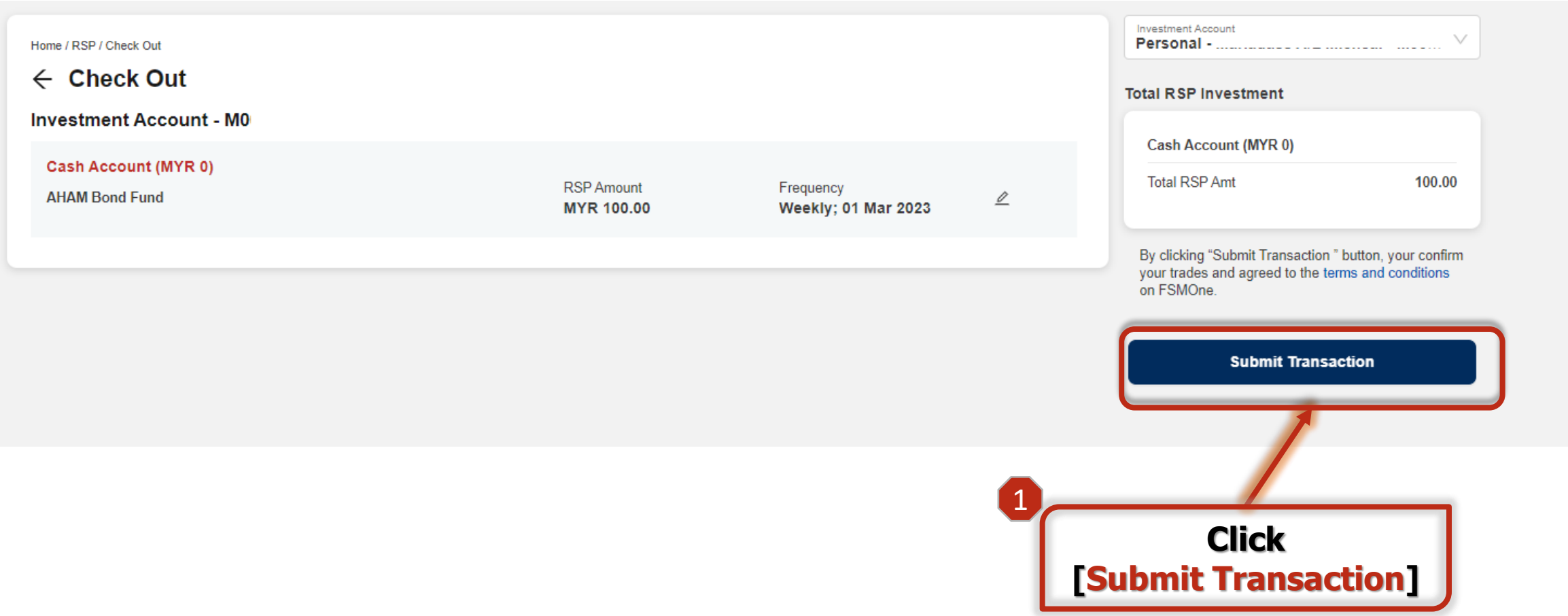


1

Click [Proceed to Check out]

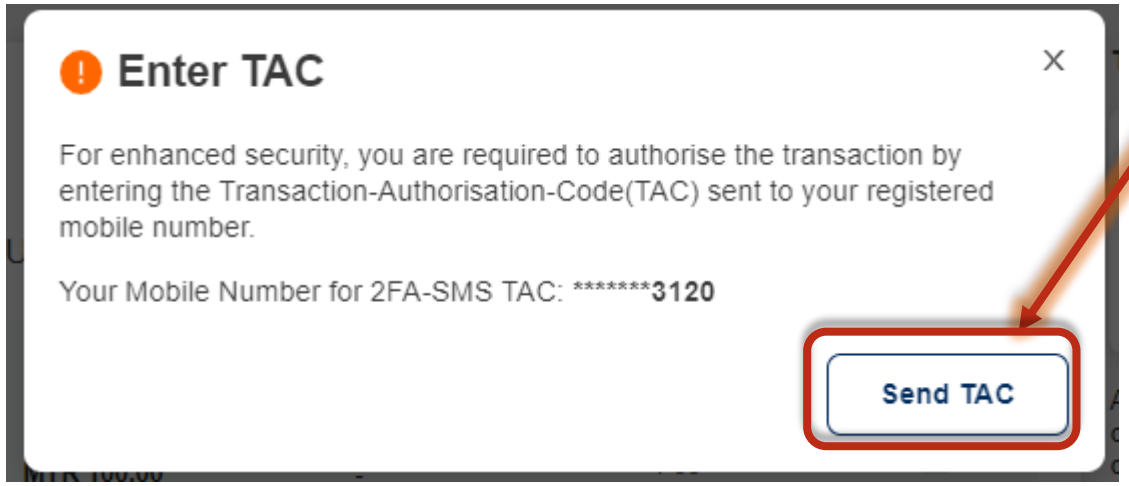
RSP unit trust funds on FSMOne

➲ Step 6

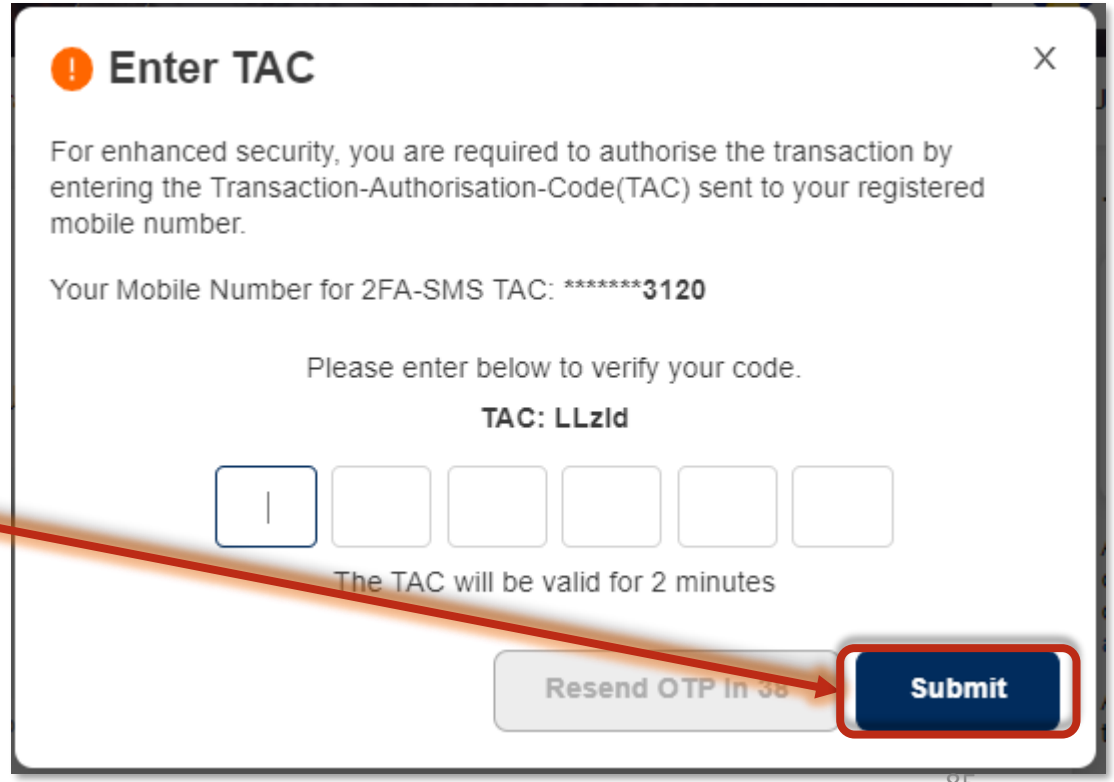


RSP unit trust funds on FSMOne

➲ Step 7



Click [Send TAC]



Enter TAC and Click [Submit]

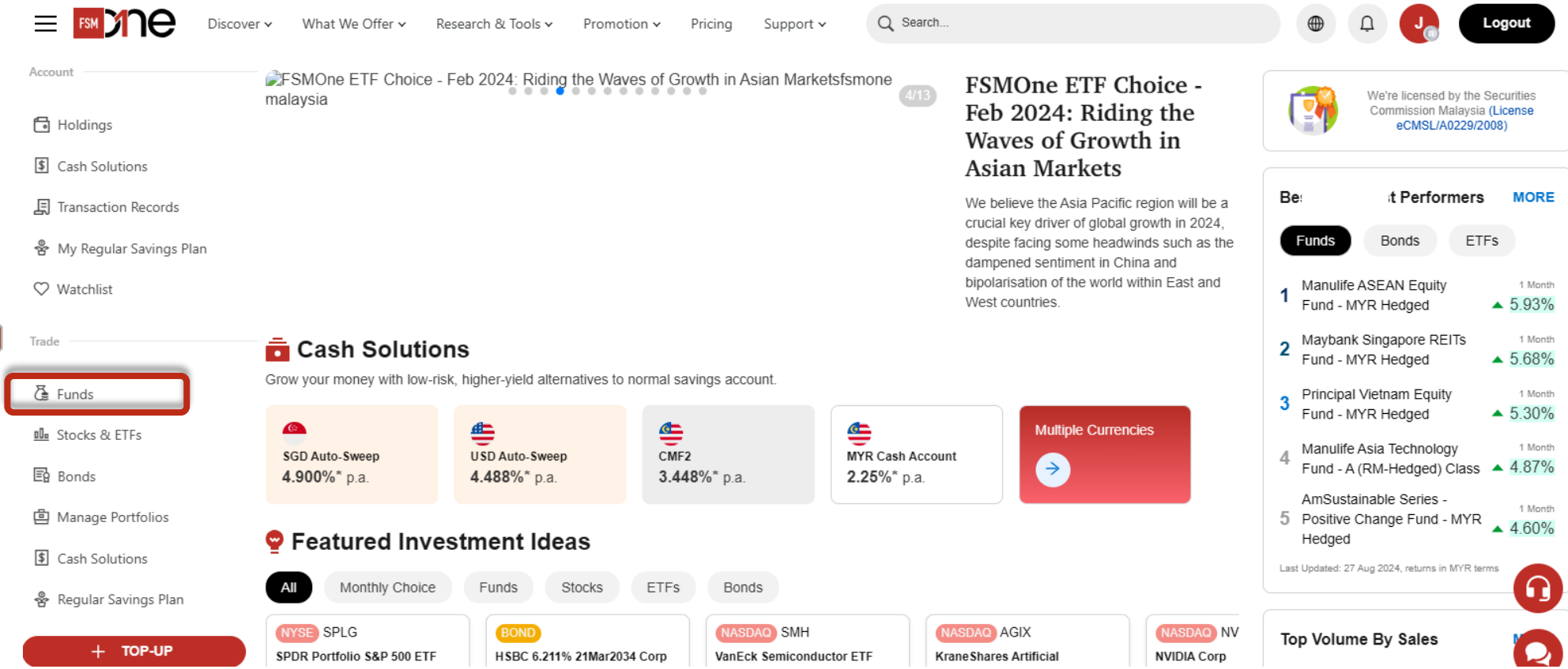
FSMOne step by step guide

Unit Trust Funds Switching

Switching Unit Trust funds on FSMOne

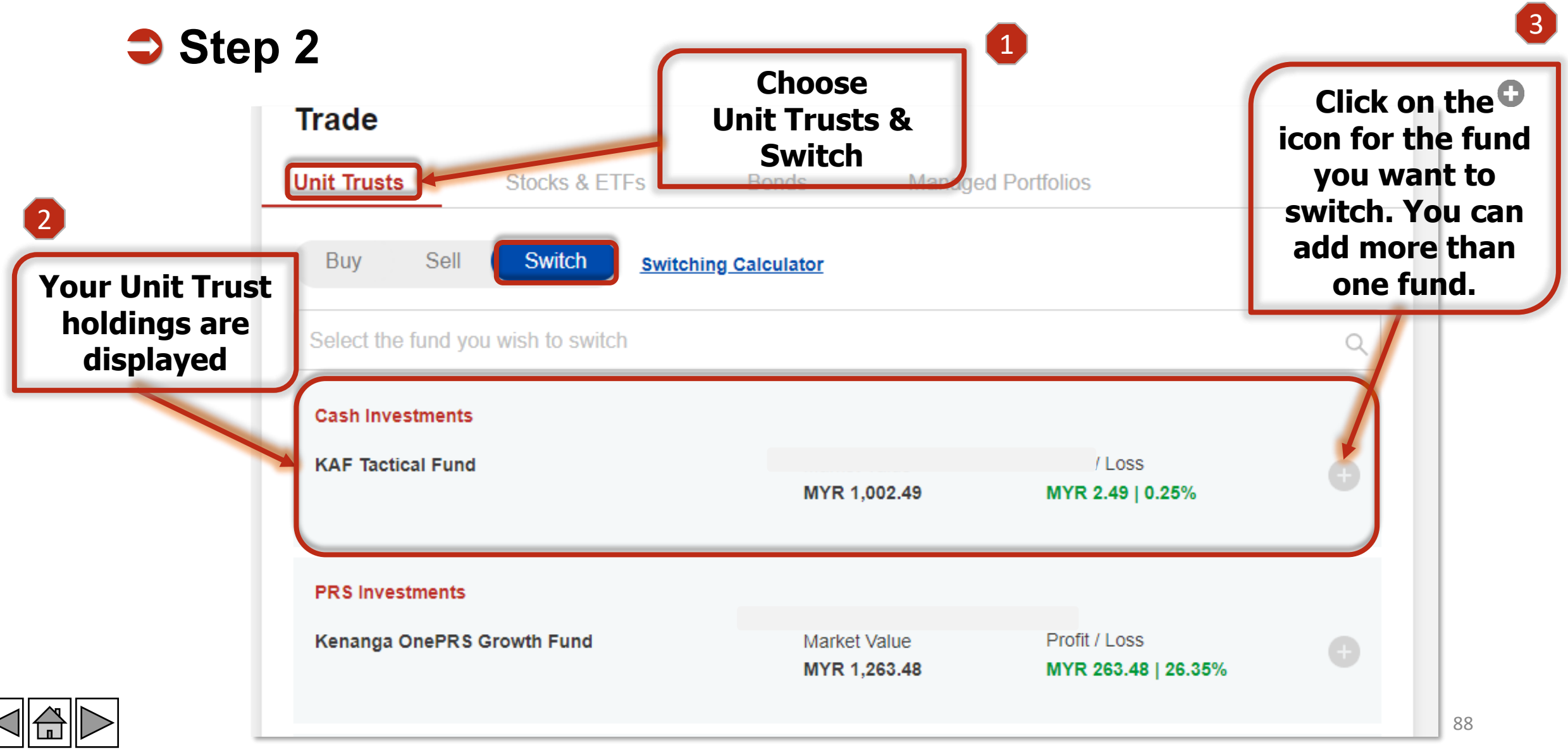
Step 1

- **Click on [Funds]**



Switching Unit Trust funds on FSMOne

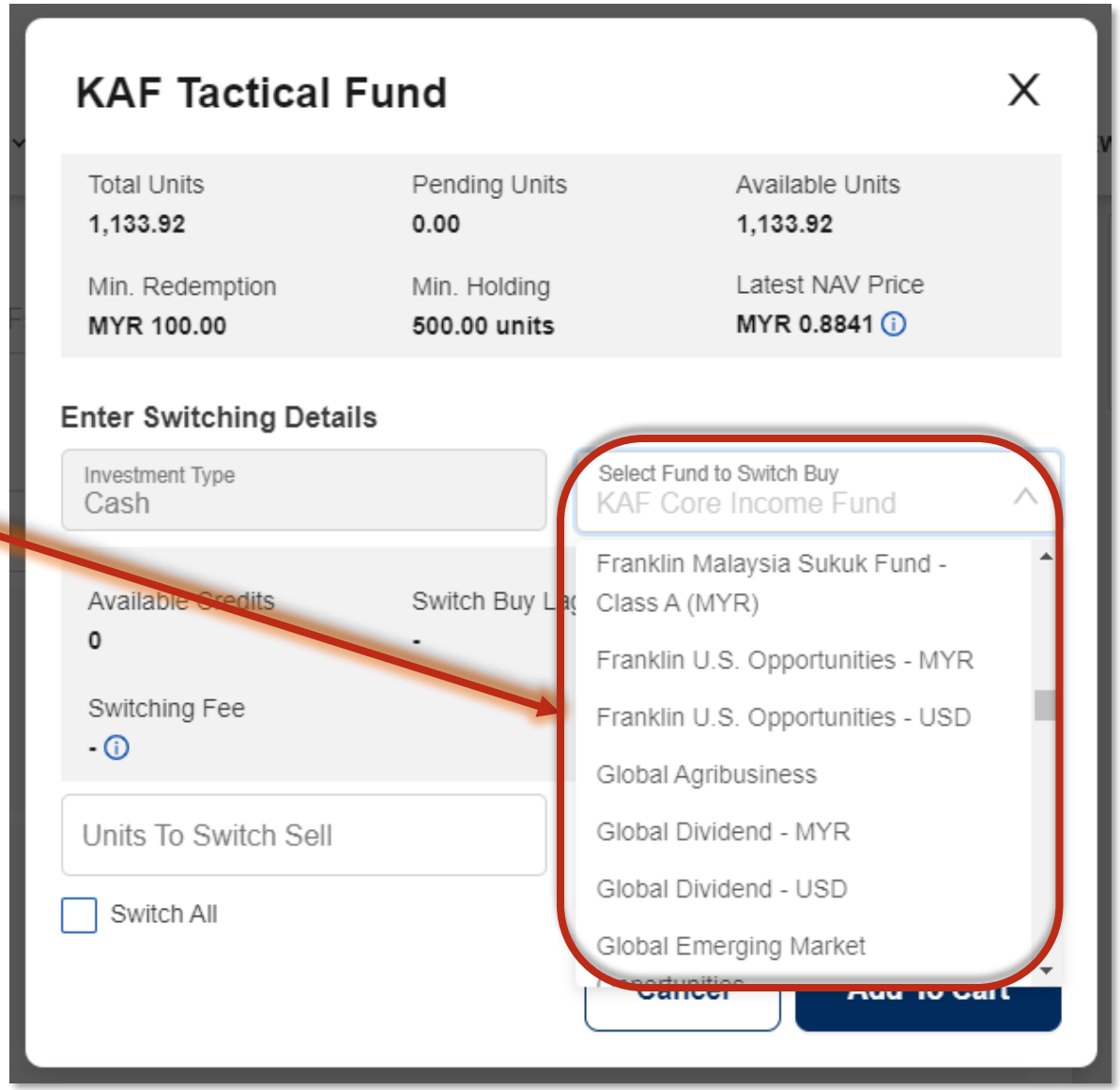
Step 2



Switching Unit Trust funds on FSMOne

➲ Step 3a

Select a fund to Switch

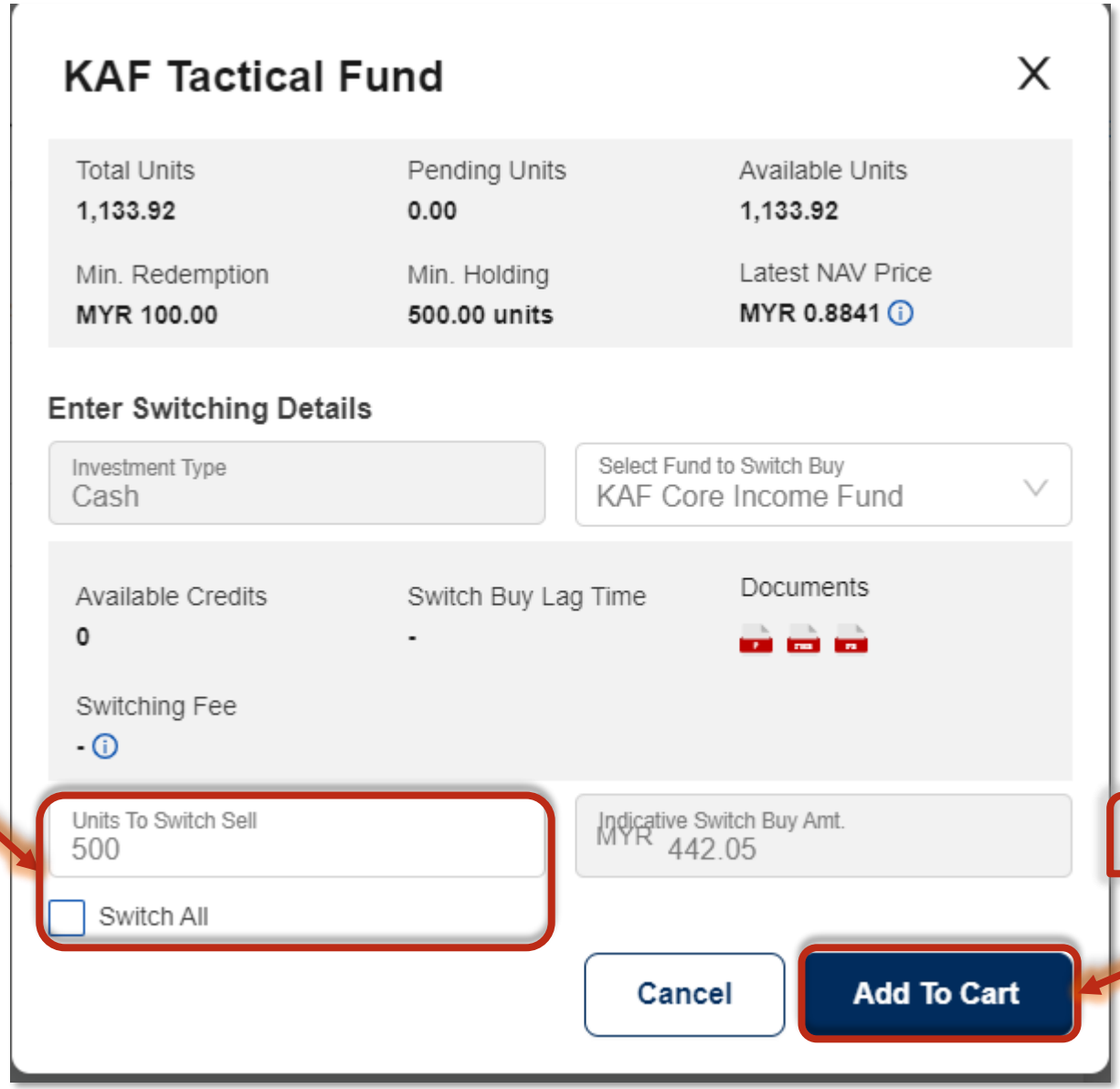


Switching Unit Trust funds on FSMOne

➲ Step 3b

1

Enter Units to Switch Sell or Select [Switch All]

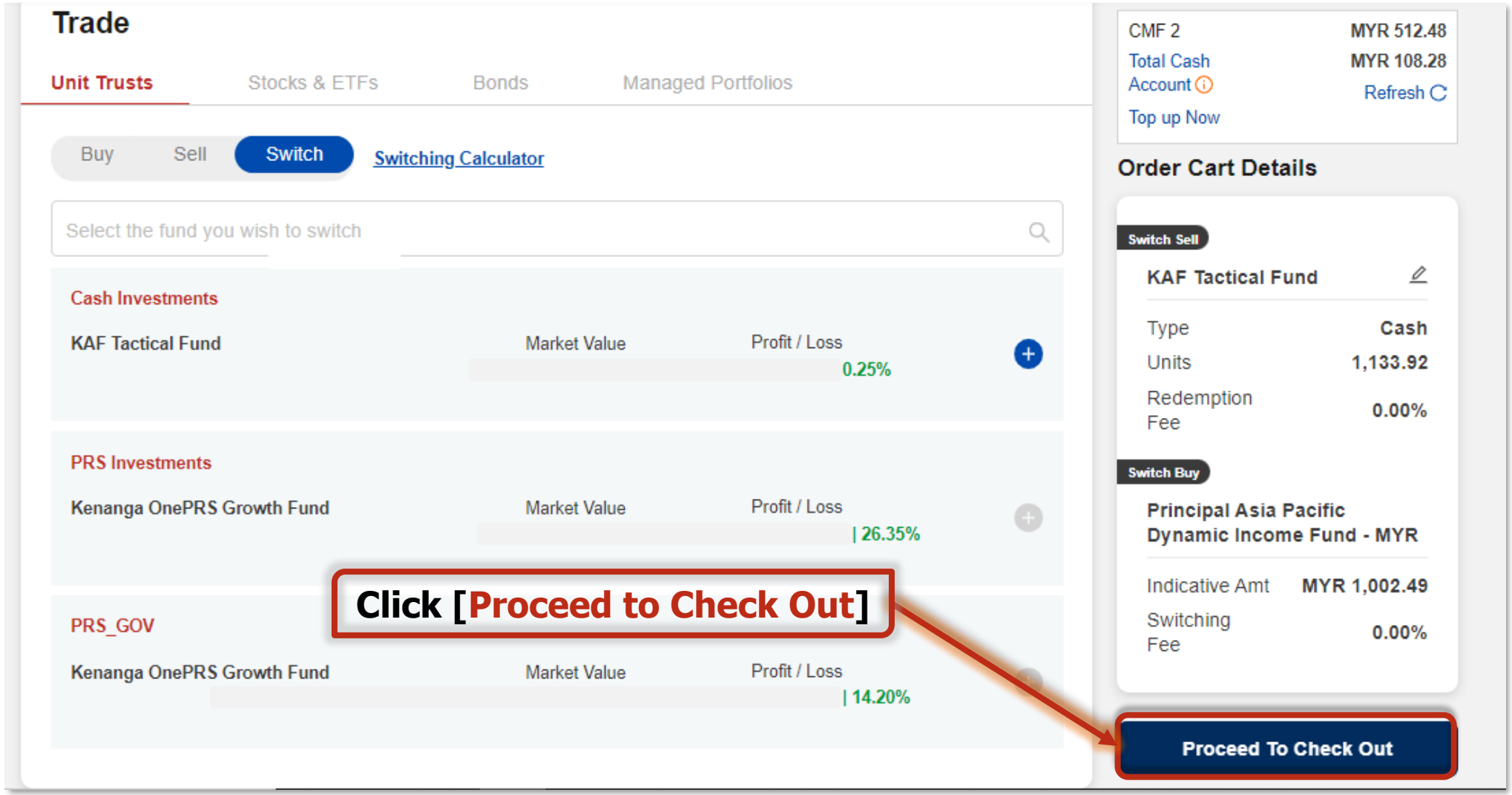


2

Select [Add to Cart]

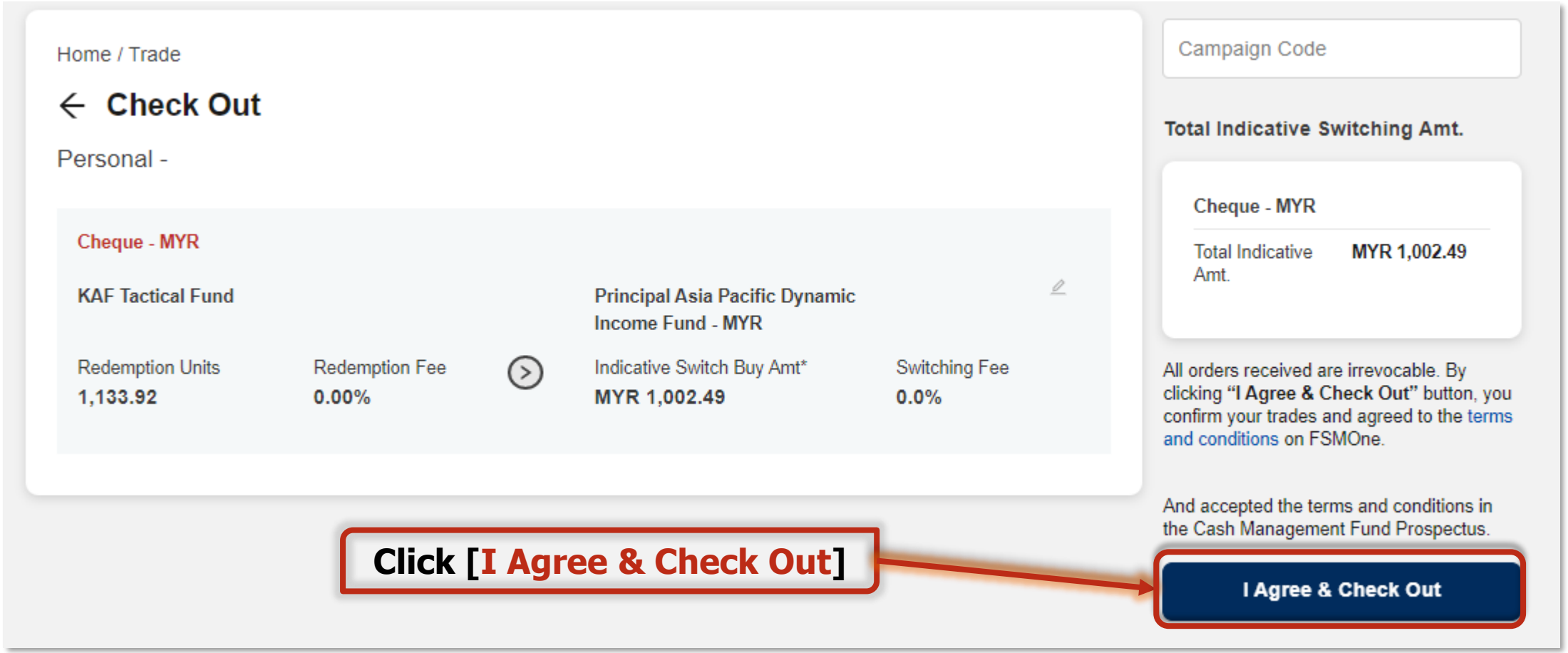
Switching Unit Trust funds on FSMOne

➲ Step 4



Switching Unit Trust funds on FSMOne

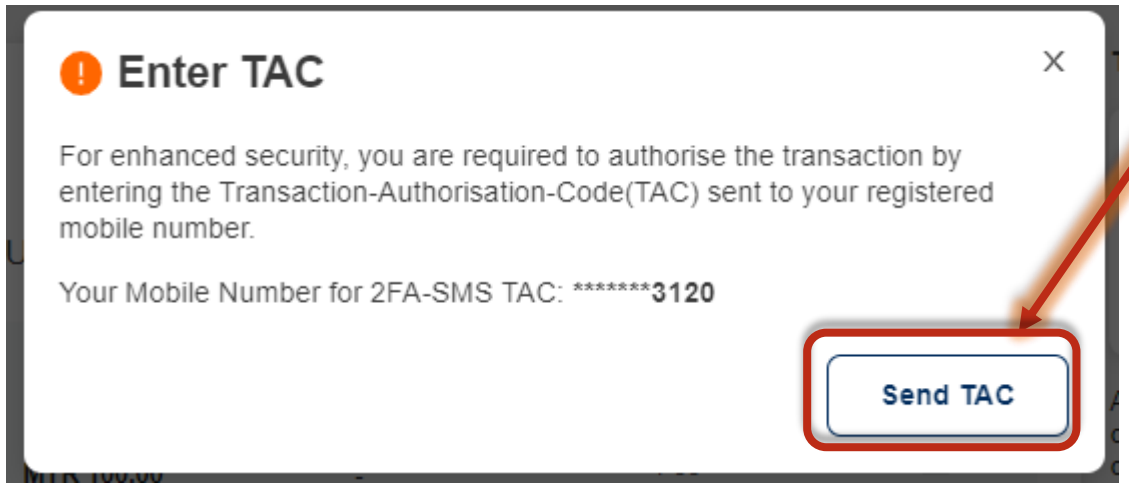
Step 5



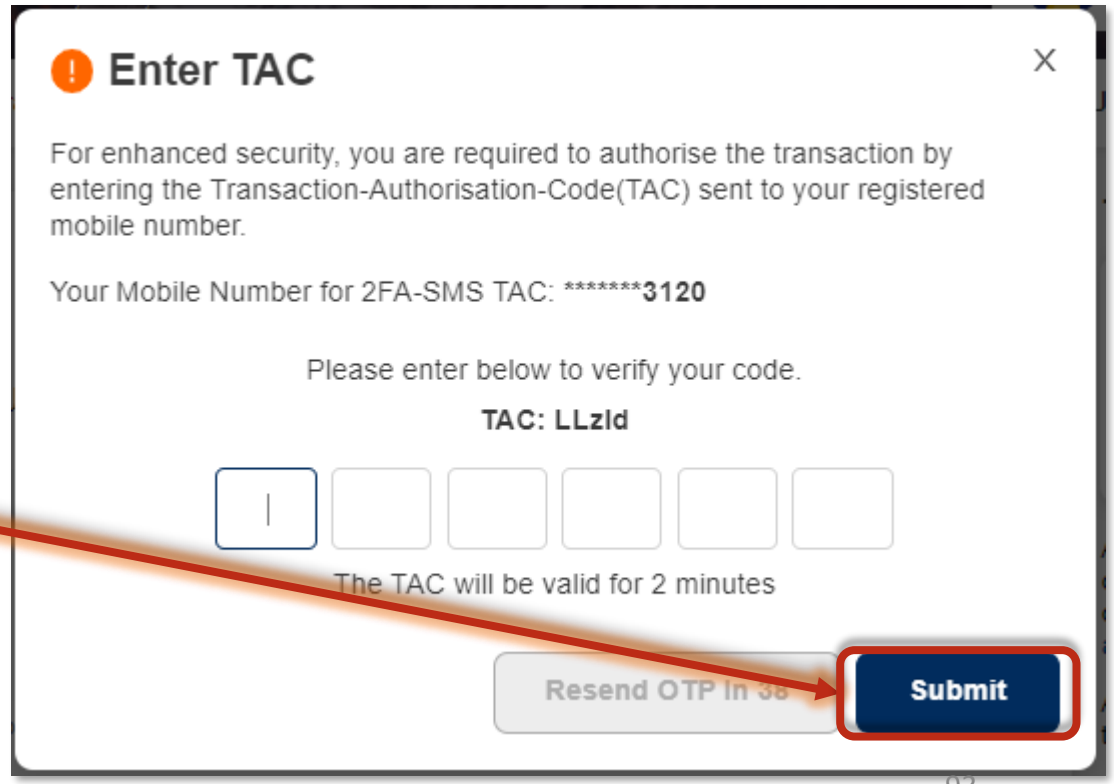
Click [I Agree & Check Out]

Switching Unit Trust funds on FSMOne

➲ Step 6



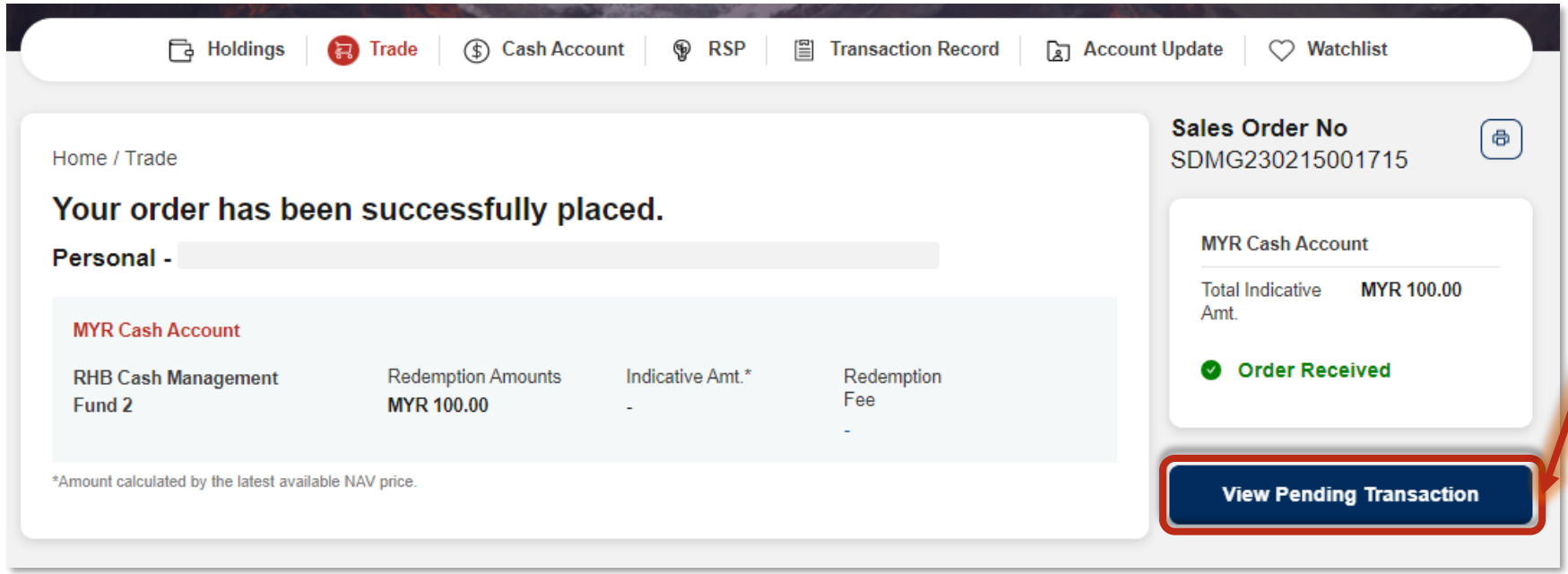
Click [Send TAC]



Enter TAC and Click [Submit]

Switching Unit Trust funds on FSMOne

- **Order is placed**



Click [View Pending Transactions] to check the order status

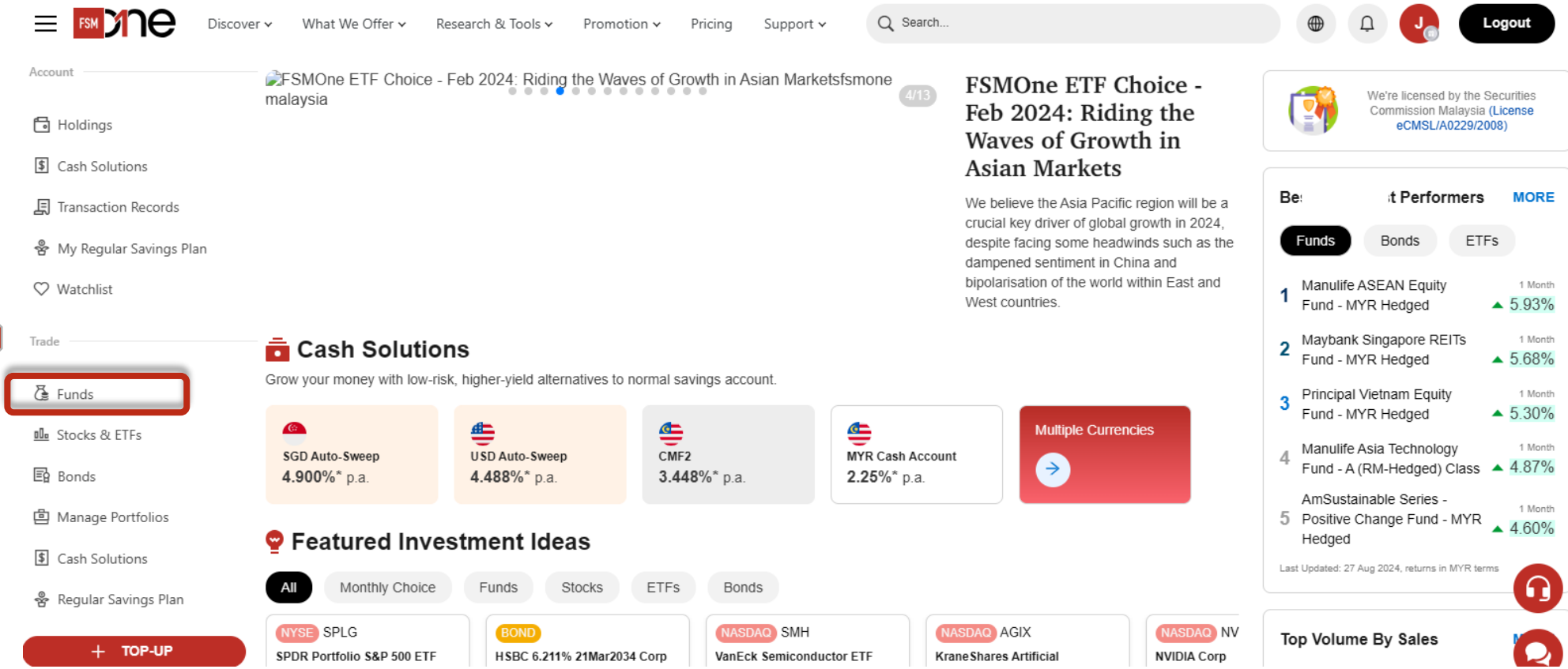
FSMOne step by step guide

Private Retirement Scheme (PRS)

Buying PRS funds on FSMOne

➲ Step 1

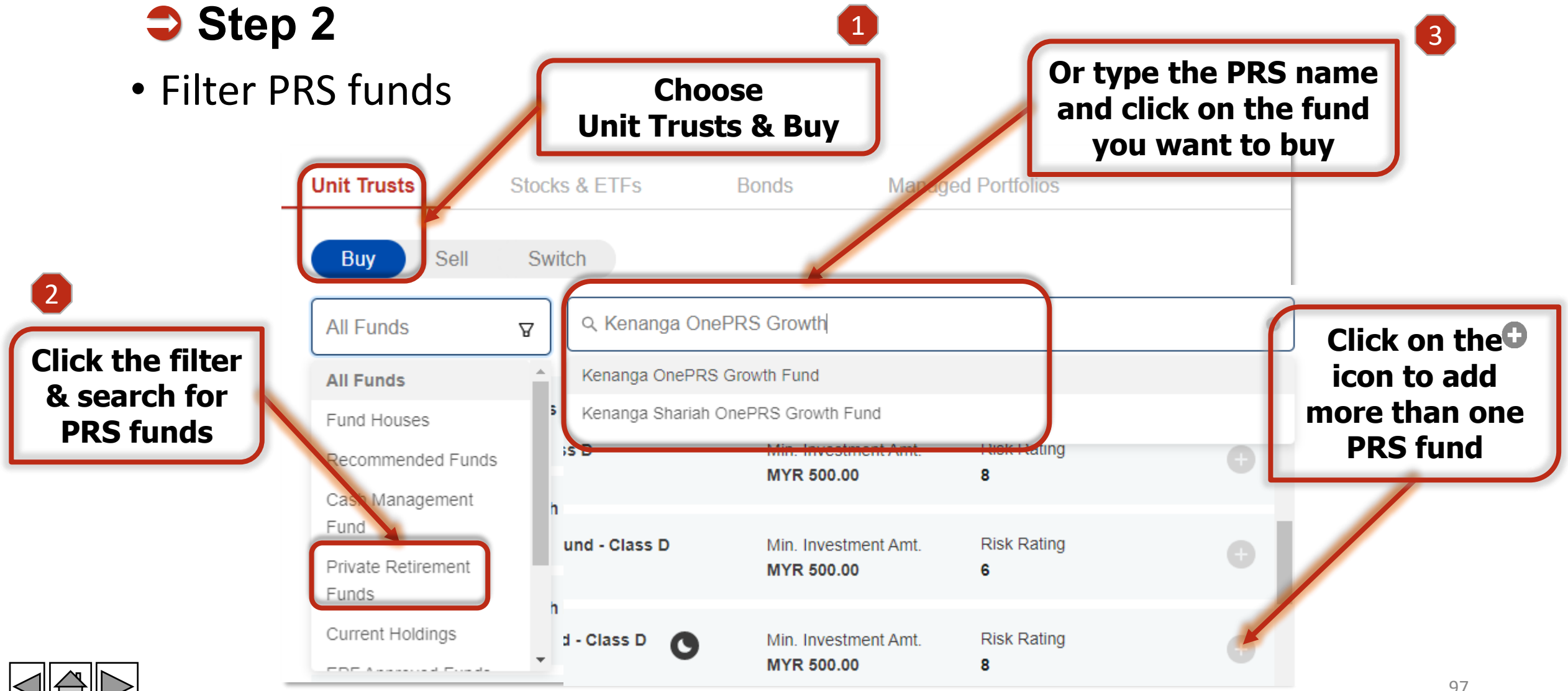
- **Click on [Funds]**



Buying PRS funds on FSMOne

➲ Step 2

- Filter PRS funds

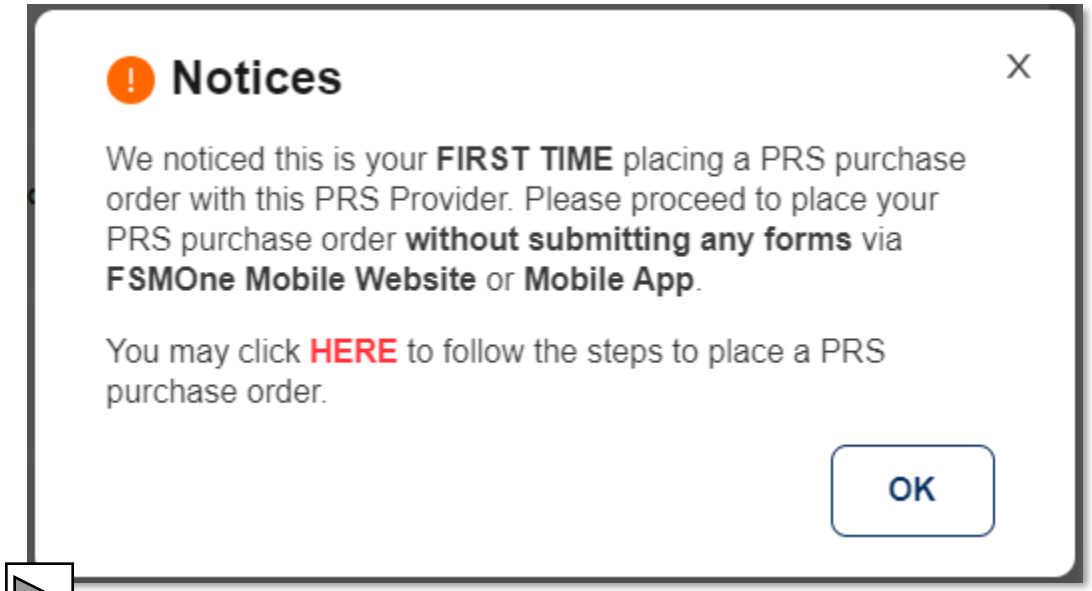


Buying PRS funds on FSMOne

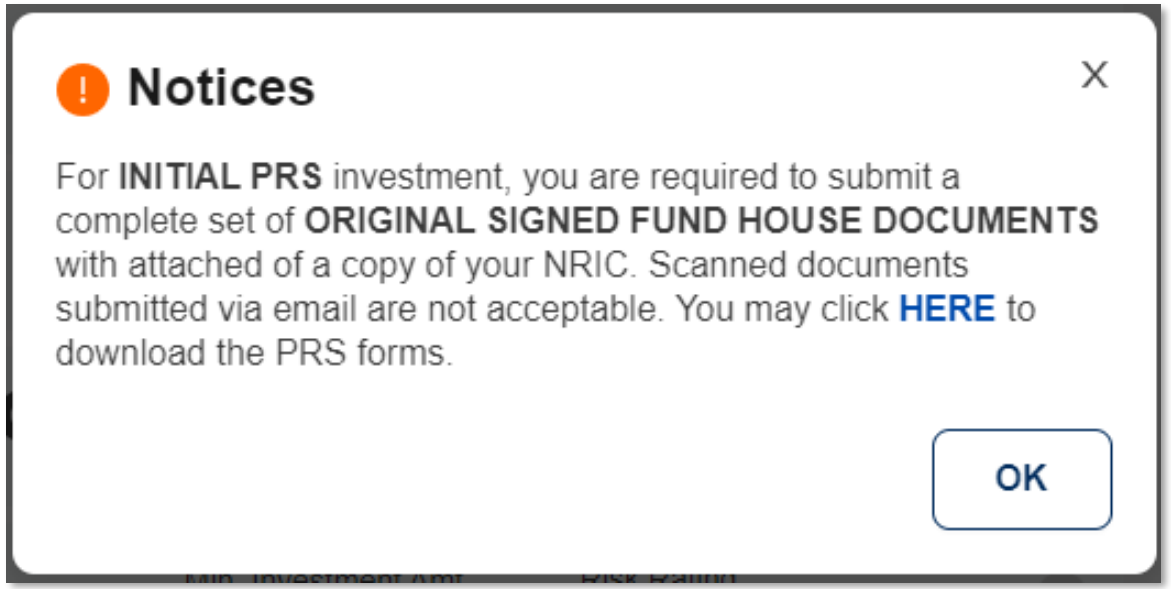
➲ Step 3a

- Initial purchase of PRS fund

Option #1: For Affin Hwang, Kenanga, Principal, and RHB PRS Funds - Invest via FSMOne Mobile WEB and Mobile App. Click Here to follow the steps.



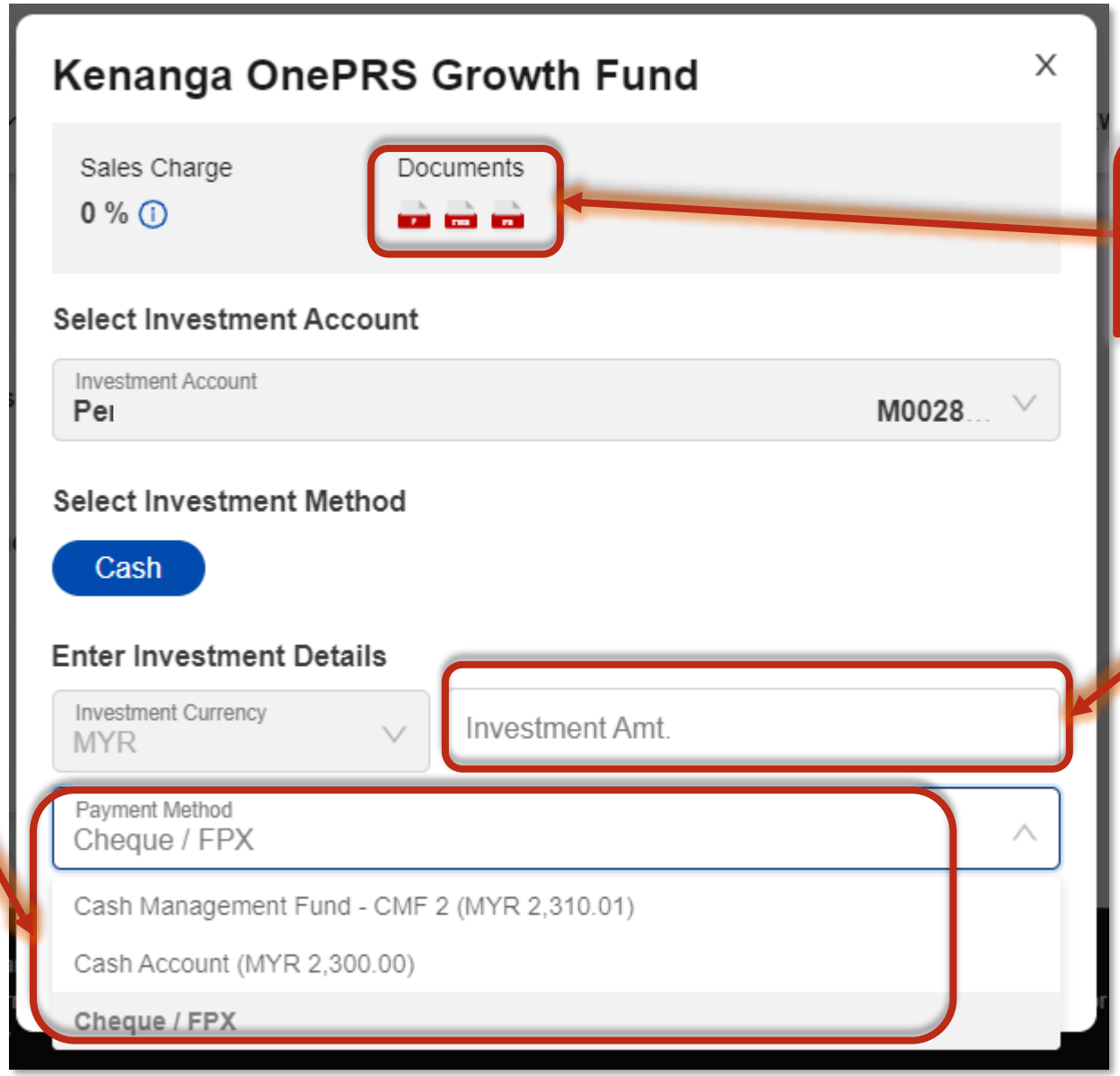
Option #2: For Manulife, AIA, AmInvestment – Submit relevant documents. Click Here to download PRS forms.



Buying PRS funds on FSMOne

➲ Step 3b

Purchase of existing PRS fund



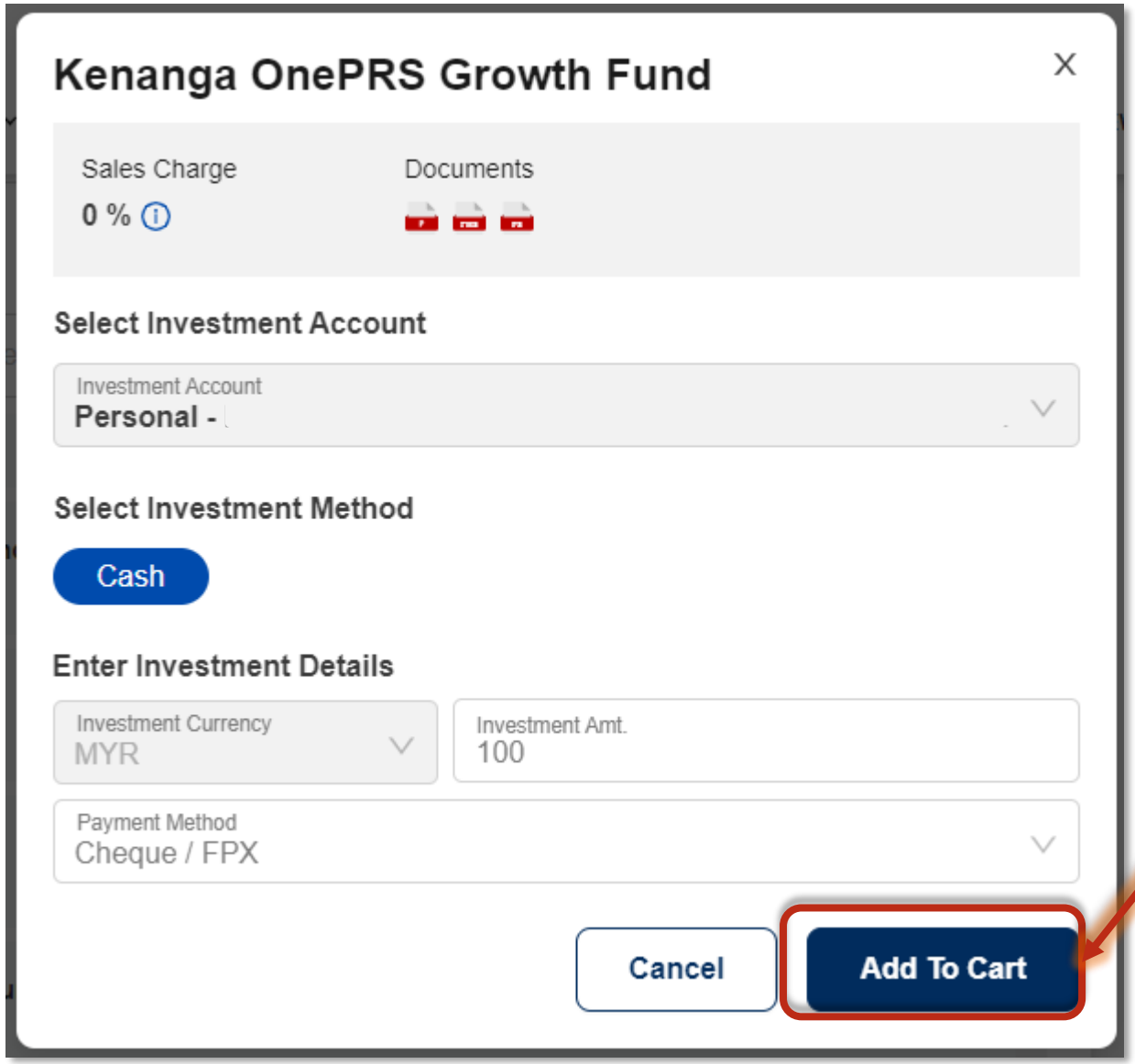
Click to view Prospectus, product highlight sheets and fund factsheet

Confirm the minimum Investment Amt

Select a payment method
- **CMF**
- **Cash Account**
- **Cheque/FPX**

Buying PRS funds on FSMOne

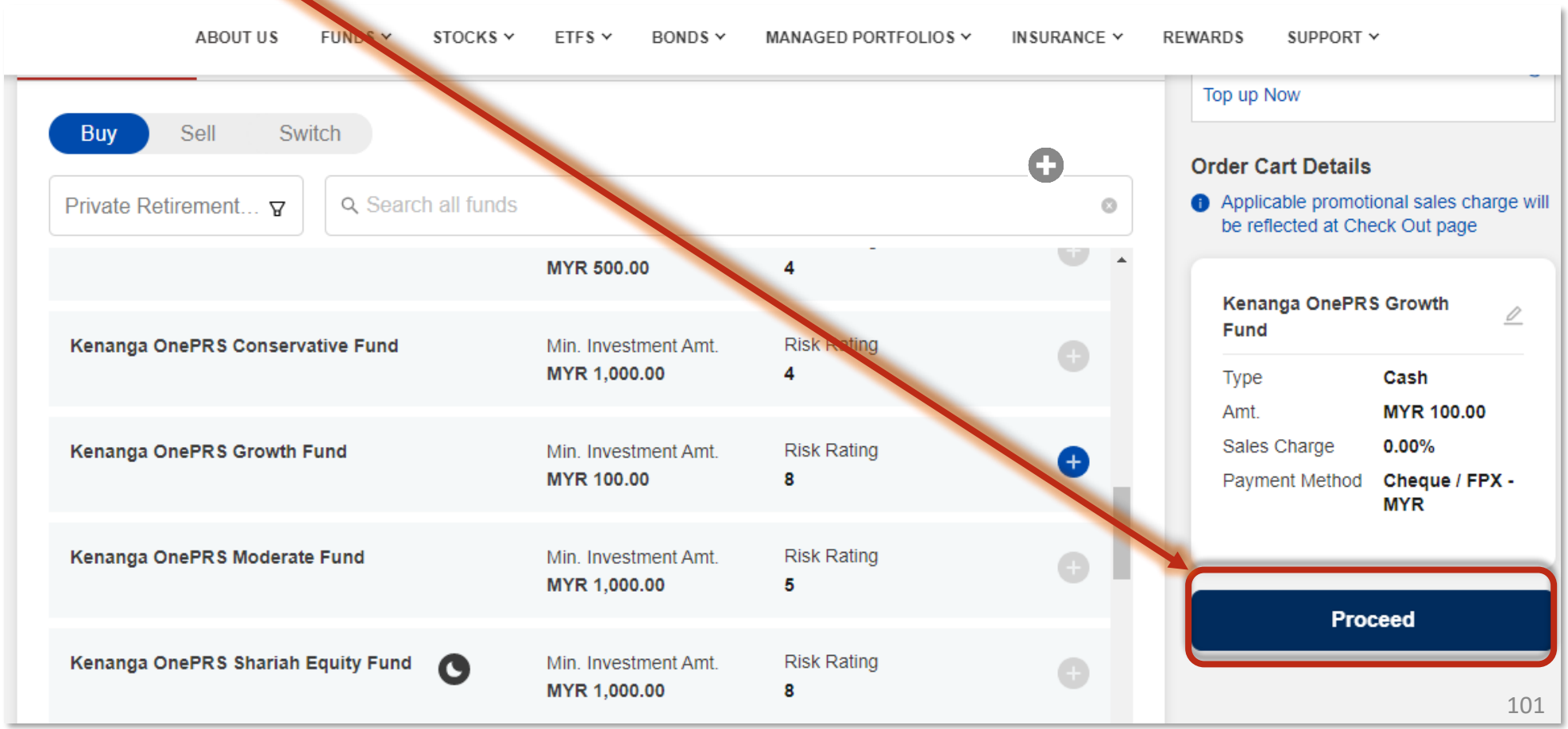
- **Step 4**



Buying PRS funds on FSMOne

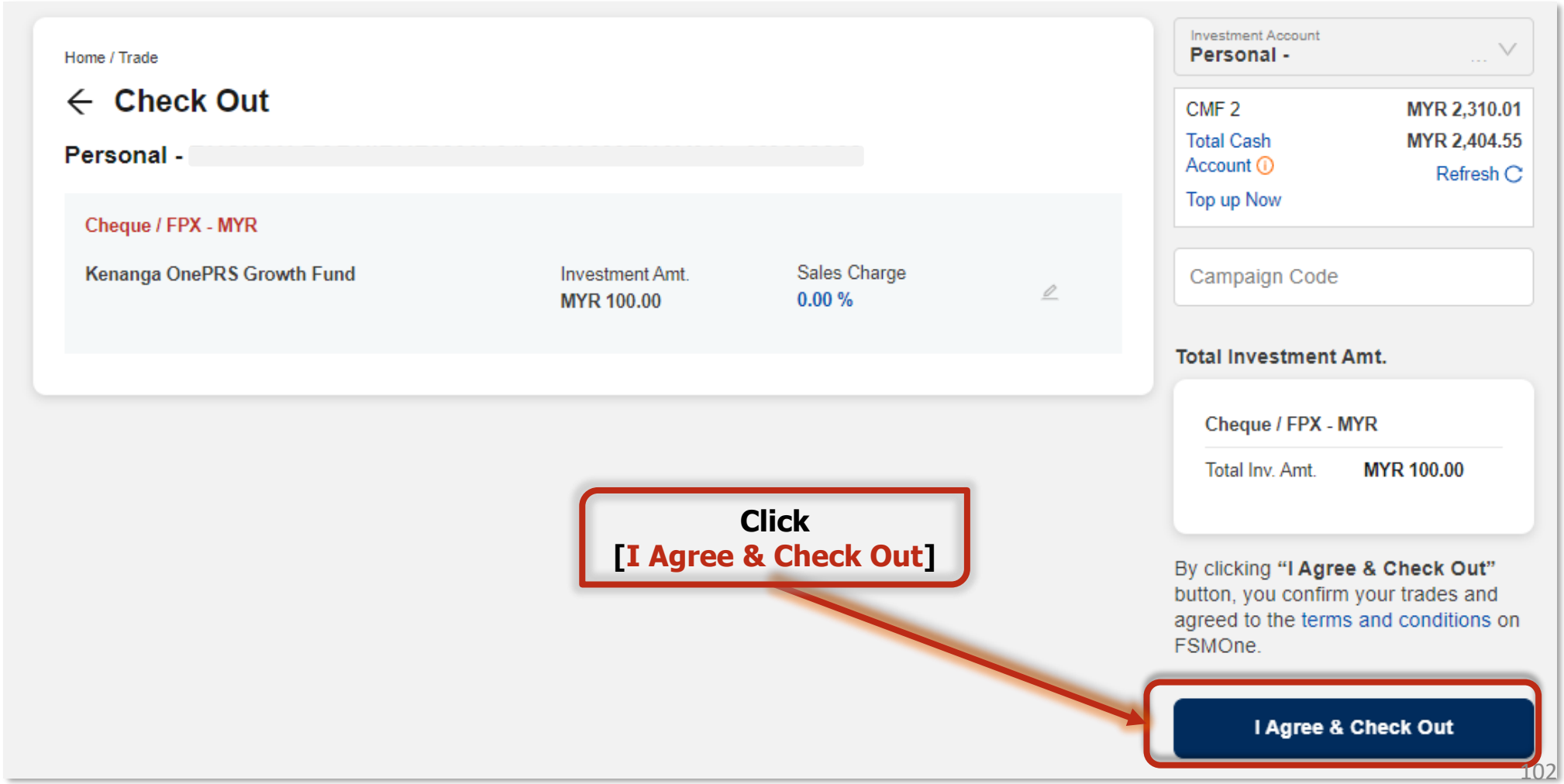
➲ Step 5

- Click [**Proceed**]



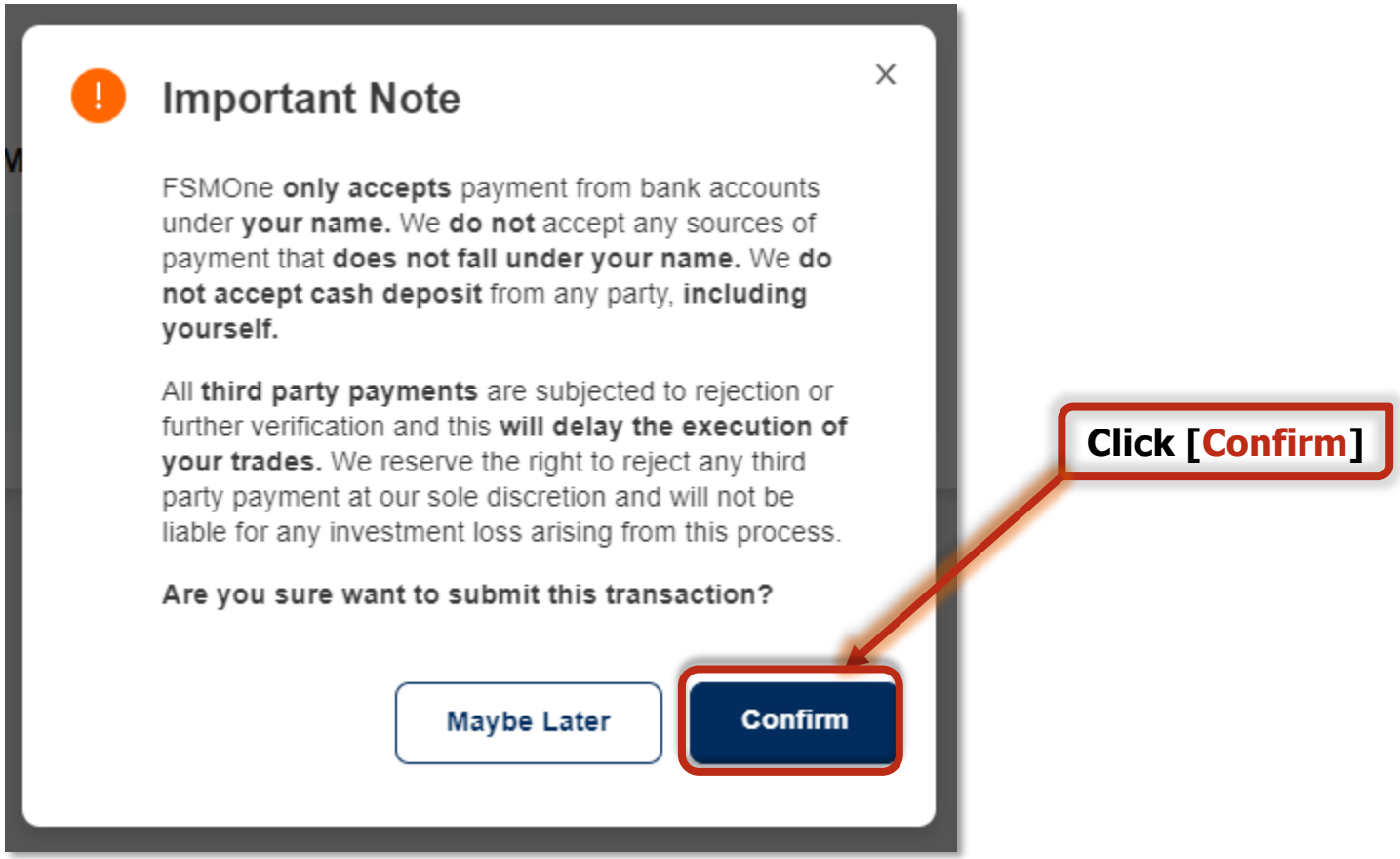
Buying PRS funds on FSMOne

Step 6a



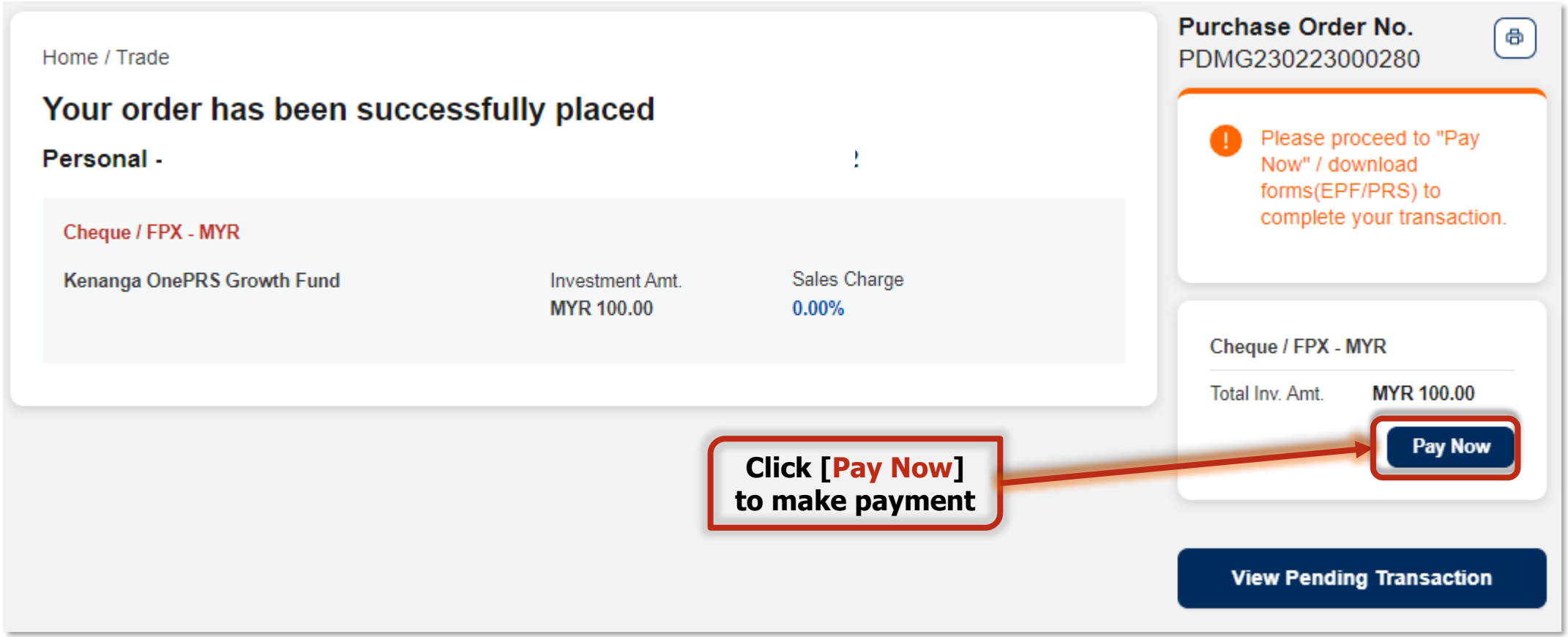
Buying PRS funds on FSMOne

- **Step 6b**



Buying PRS funds on FSMOne

➲ Step 7

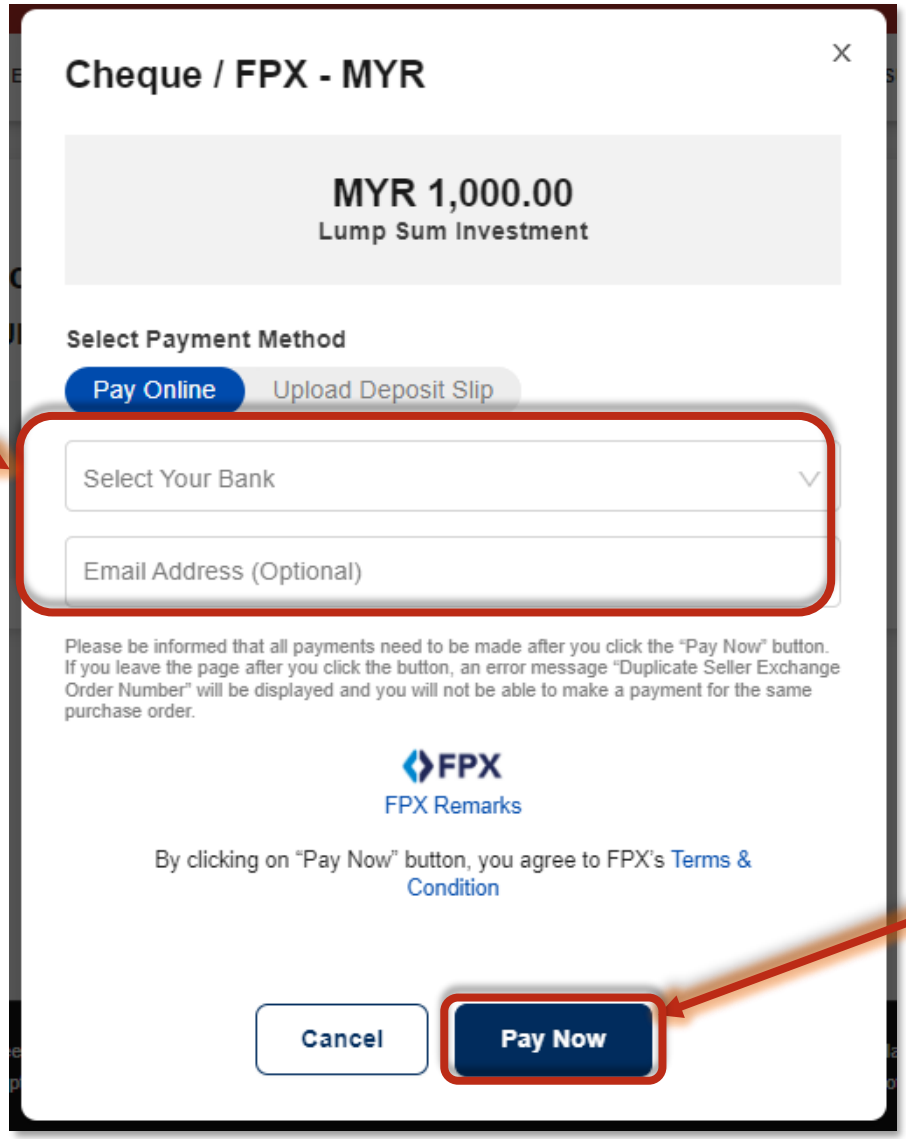


Buying PRS funds on FSMOne

➲ Step 8

1

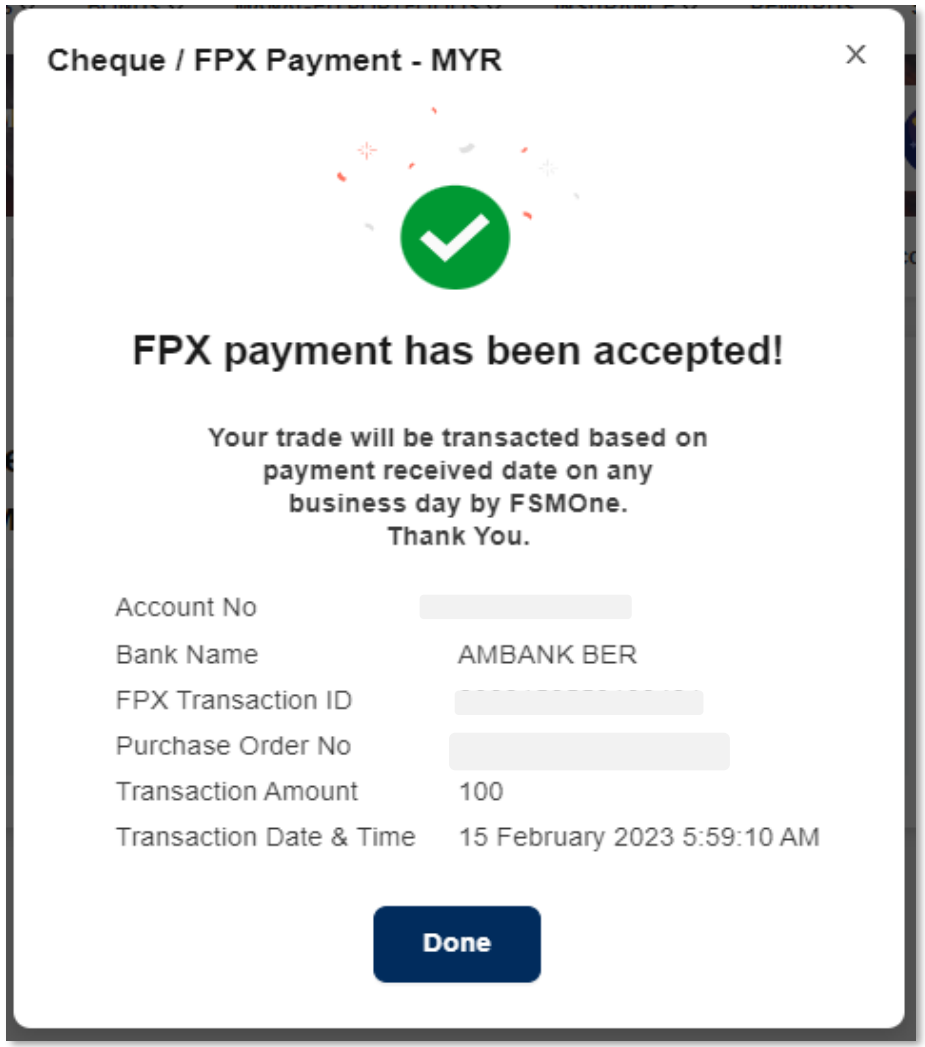
Enter Bank Details



2

Click [Pay Now] to make payment

Buying PRS funds on FSMOne



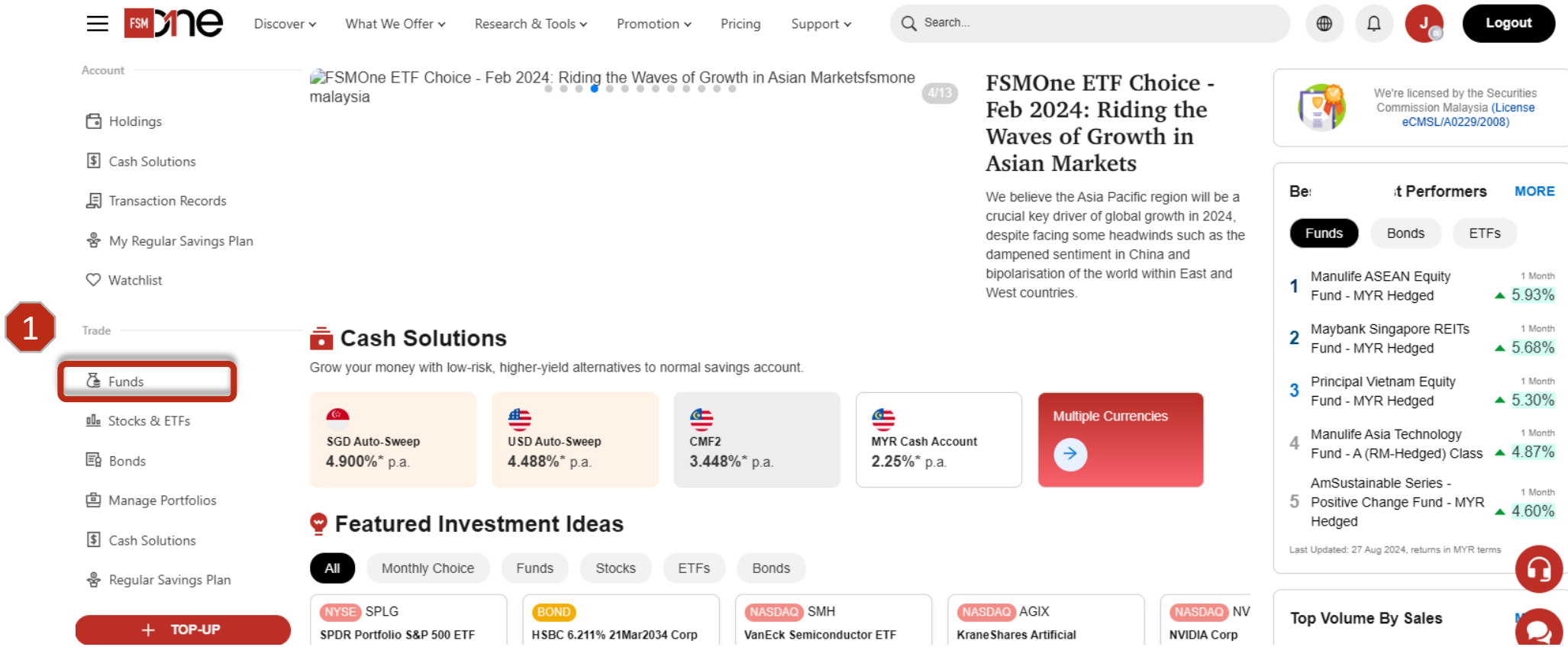
FSMOne step by step guide

Private Retirement Scheme (PRS)- Switching

Switching PRS funds on FSMOne

Step 1

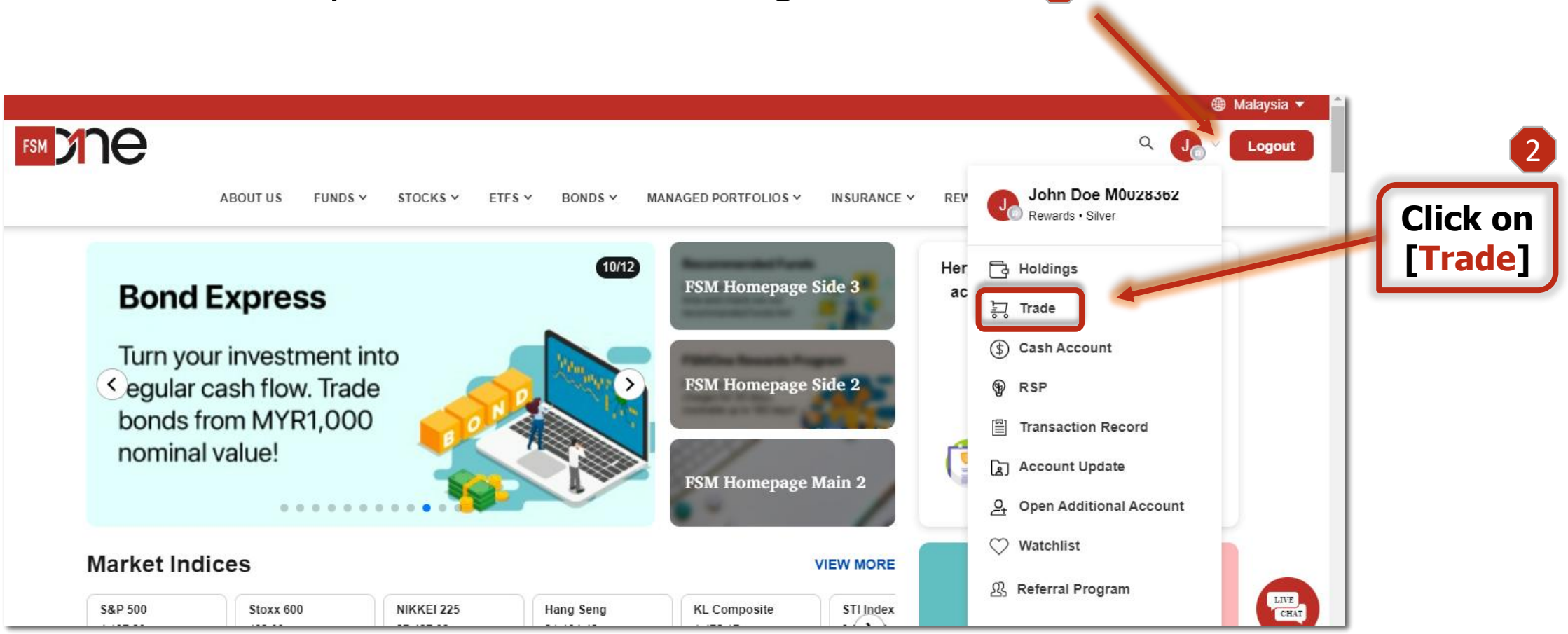
- **Click on [Funds]**



Switching PRS funds on FSMOne

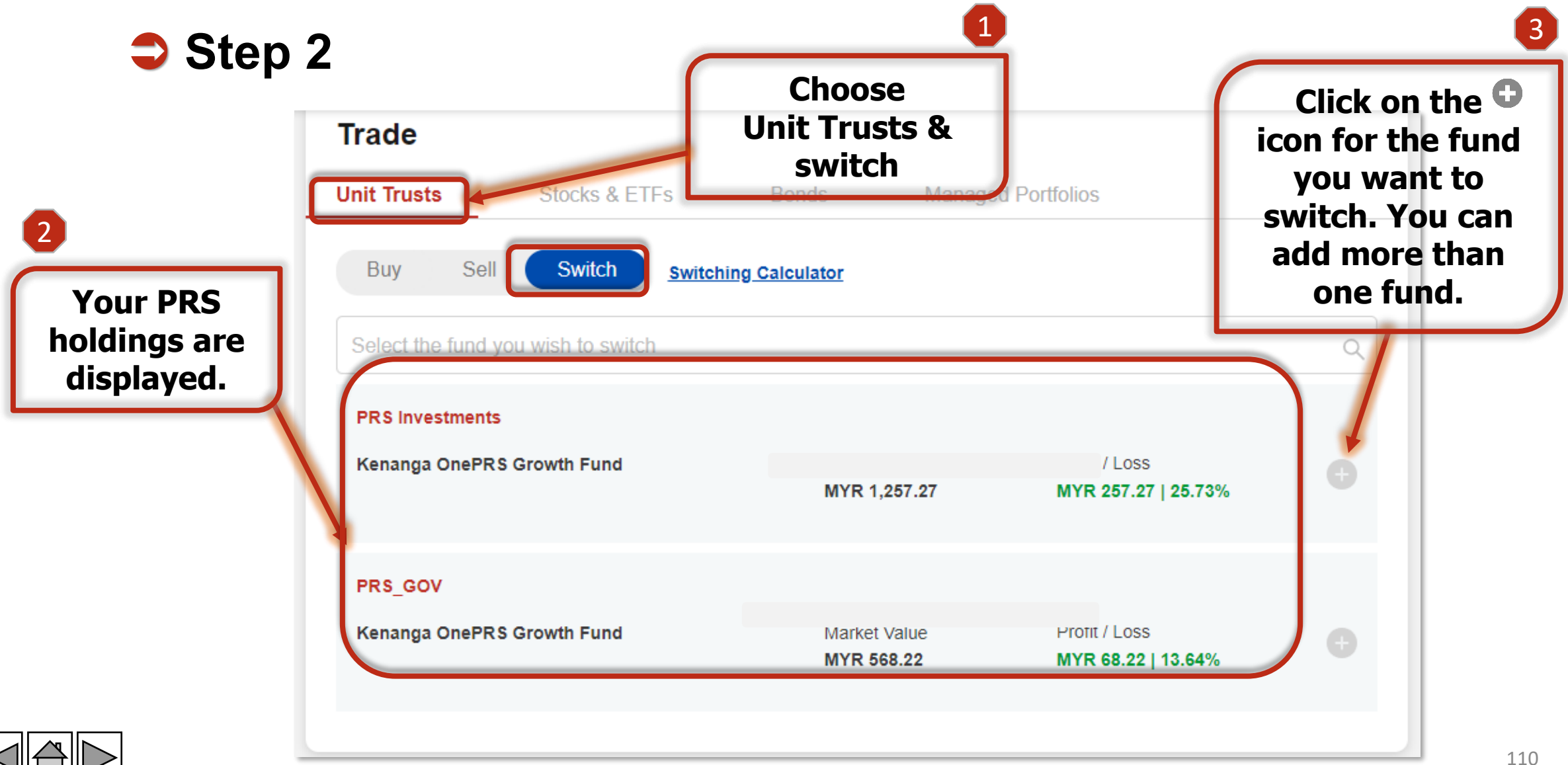
➲ Step 1

- Point at the dropdown beside the Logout button 1



Switching PRS funds on FSMOne

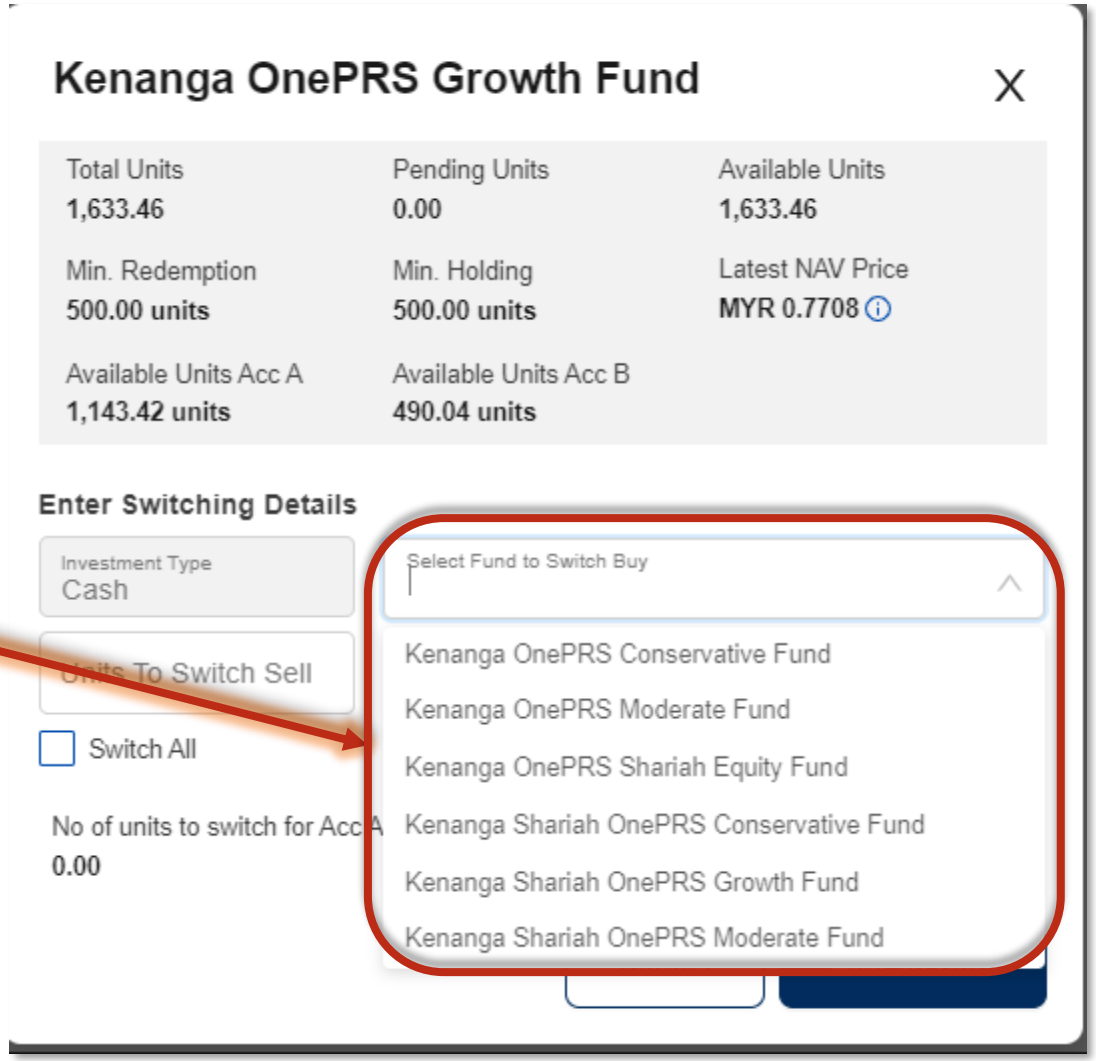
➲ Step 2



Switching PRS funds on FSMOne

➲ Step 3a

Select funds to Switch
***You can only switch within the same fund house**

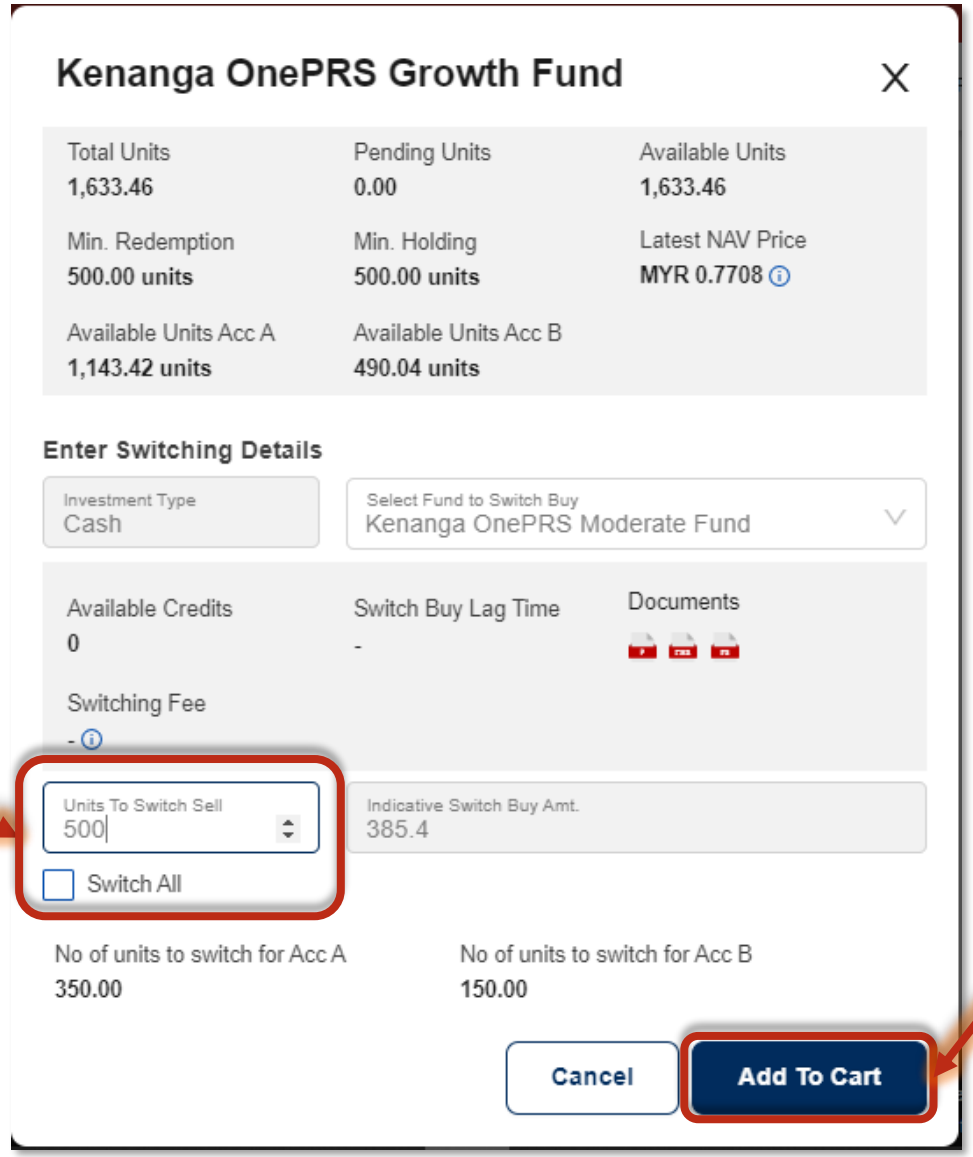


Switching PRS funds on FSMOne

➲ Step 3b

1

Enter Units to Switch Sell or Select [Switch All]

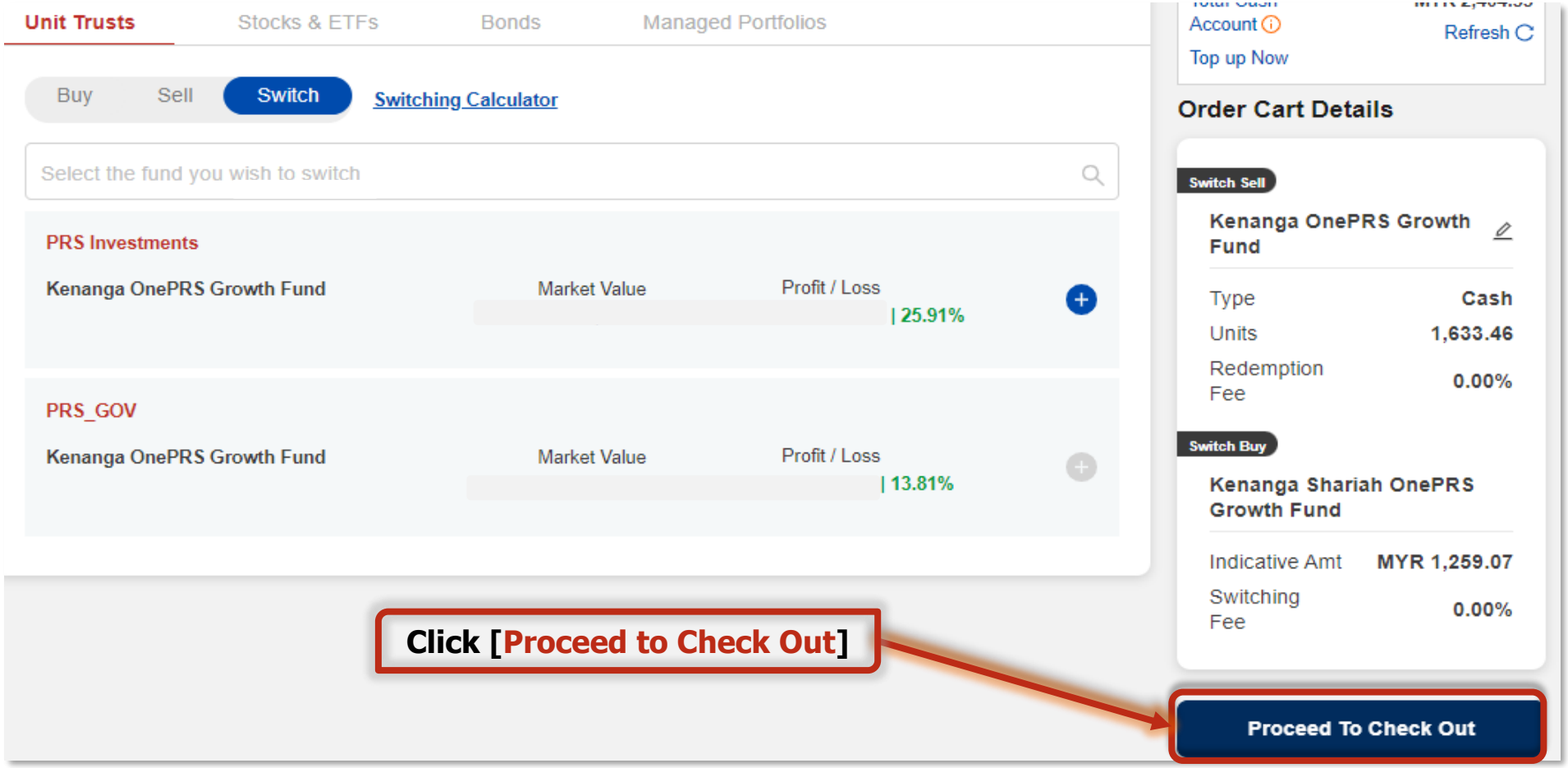


2

Select [Add to Cart]

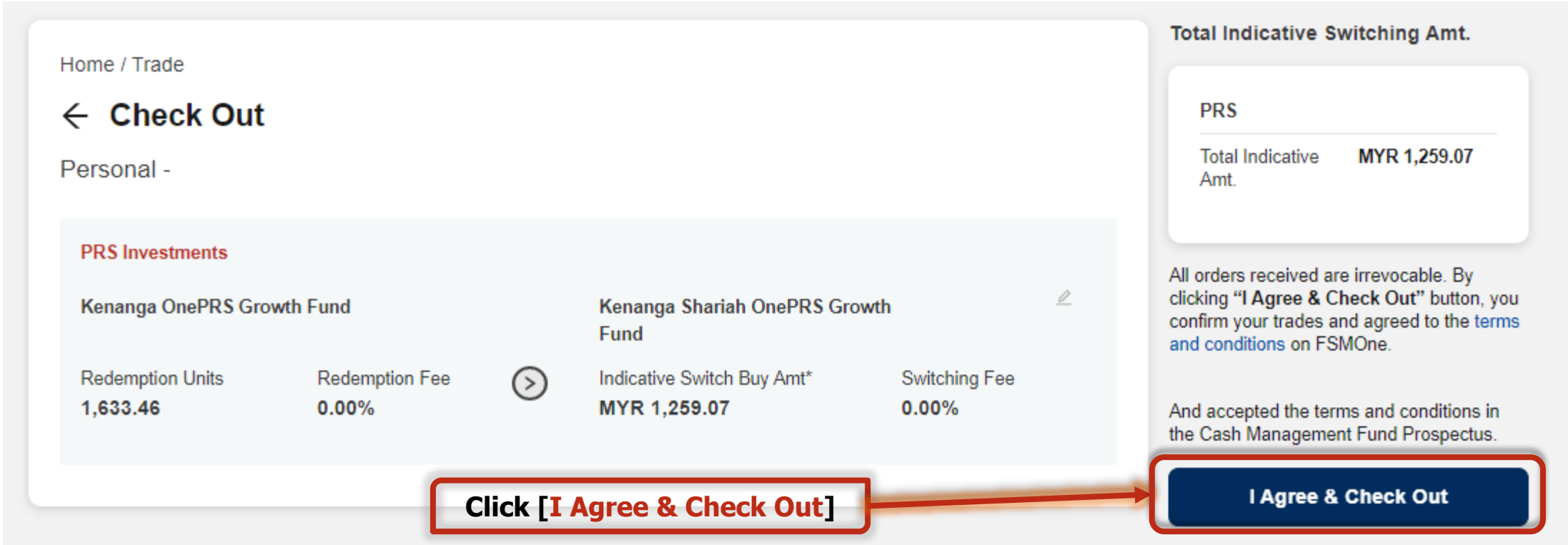
Switching PRS funds on FSMOne

Step 4



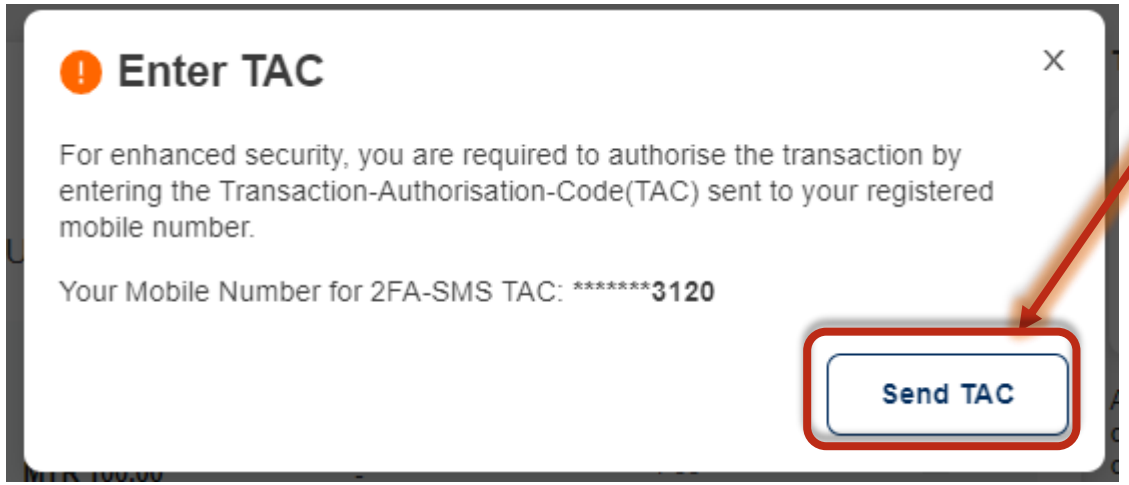
Switching PRS funds on FSMOne

Step 5

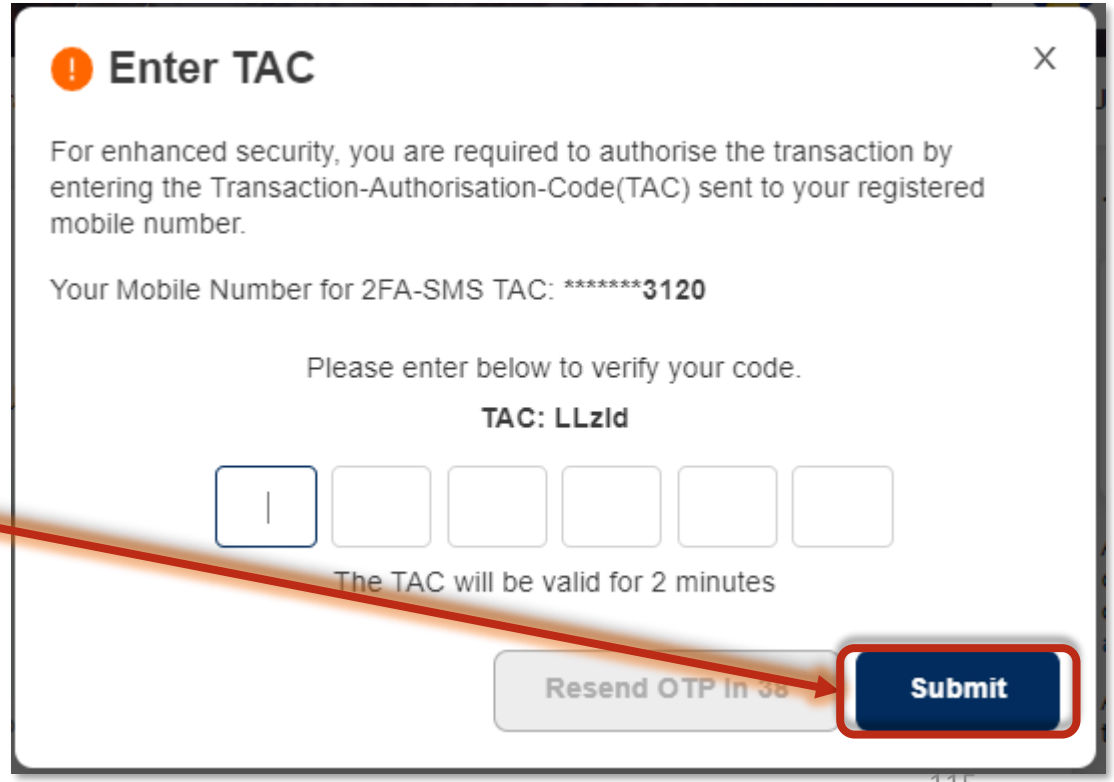


Switching PRS funds on FSMOne

Step 6



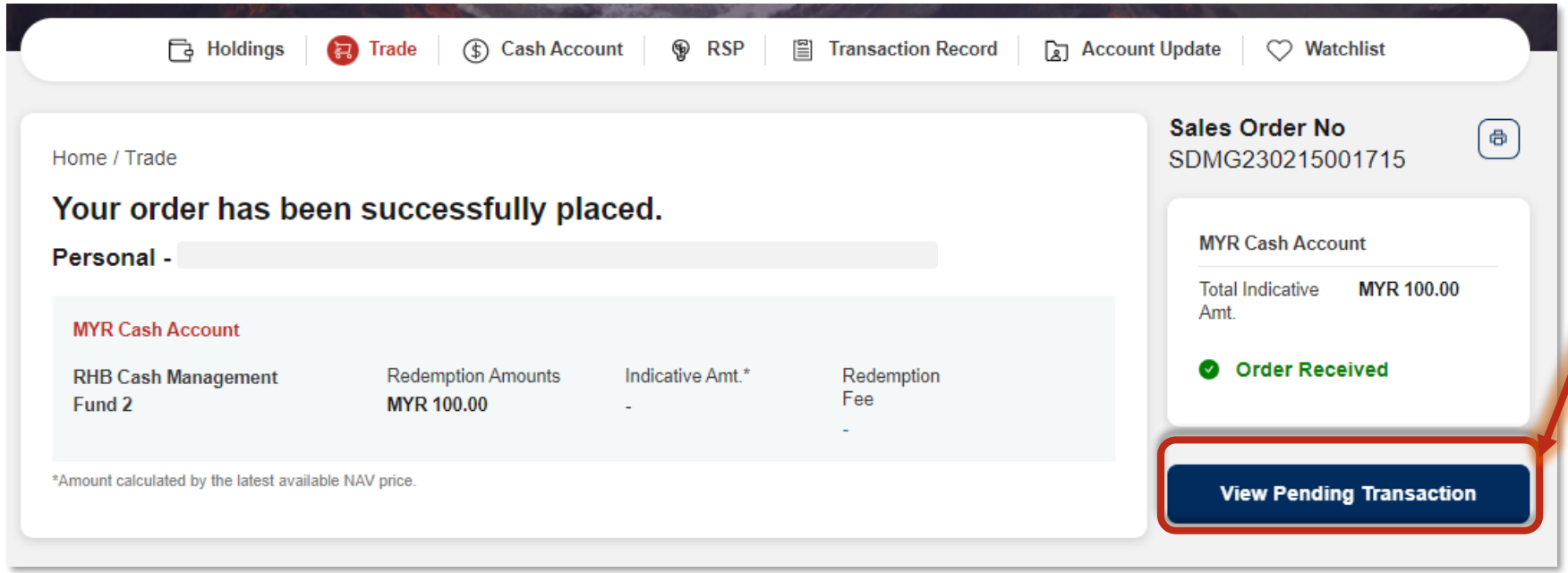
Click [Send TAC]



Enter TAC and Click [Submit]

Switching PRS funds on FSMOne

- Order is placed



Click [View Pending Transactions] to check the order status

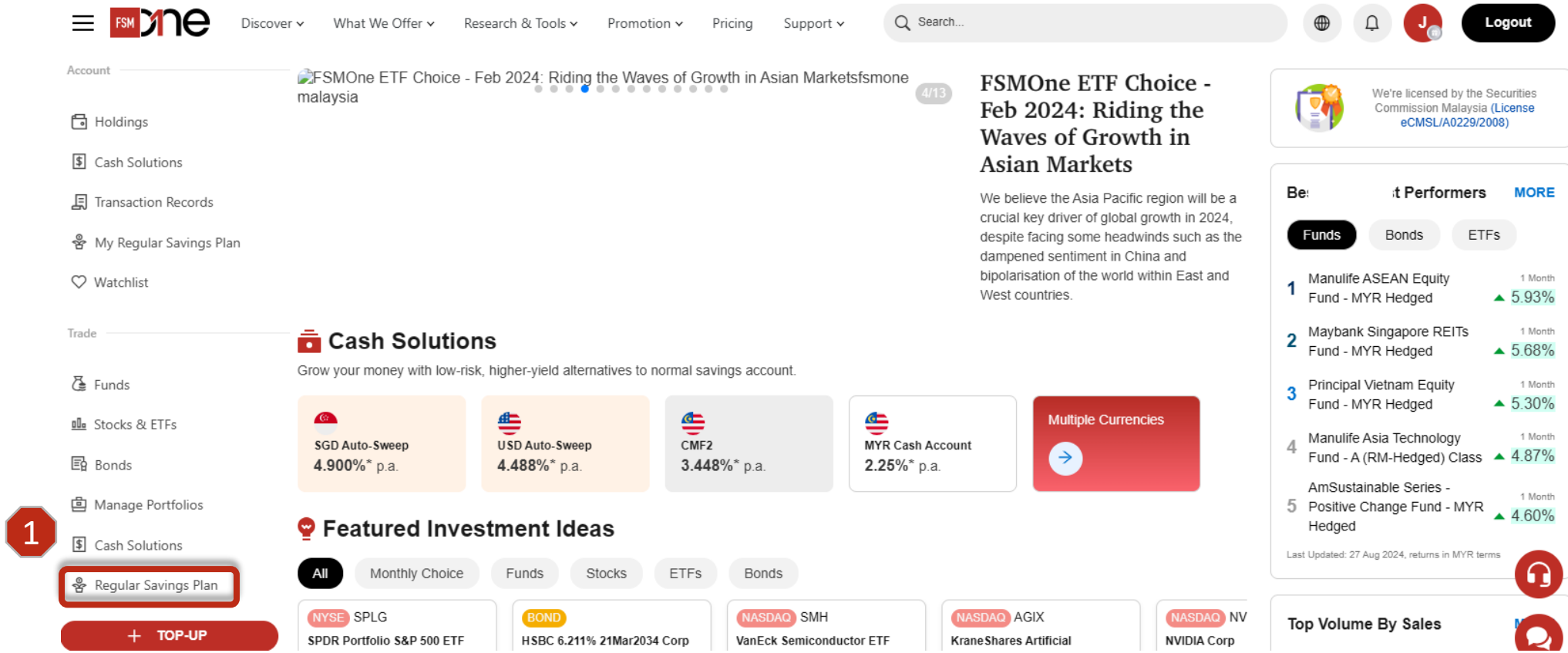
FSMOne step by step guide

Private Retirement Scheme (PRS)-
Regular Saving Plan (RSP)

RSP for PRS funds on FSMOne

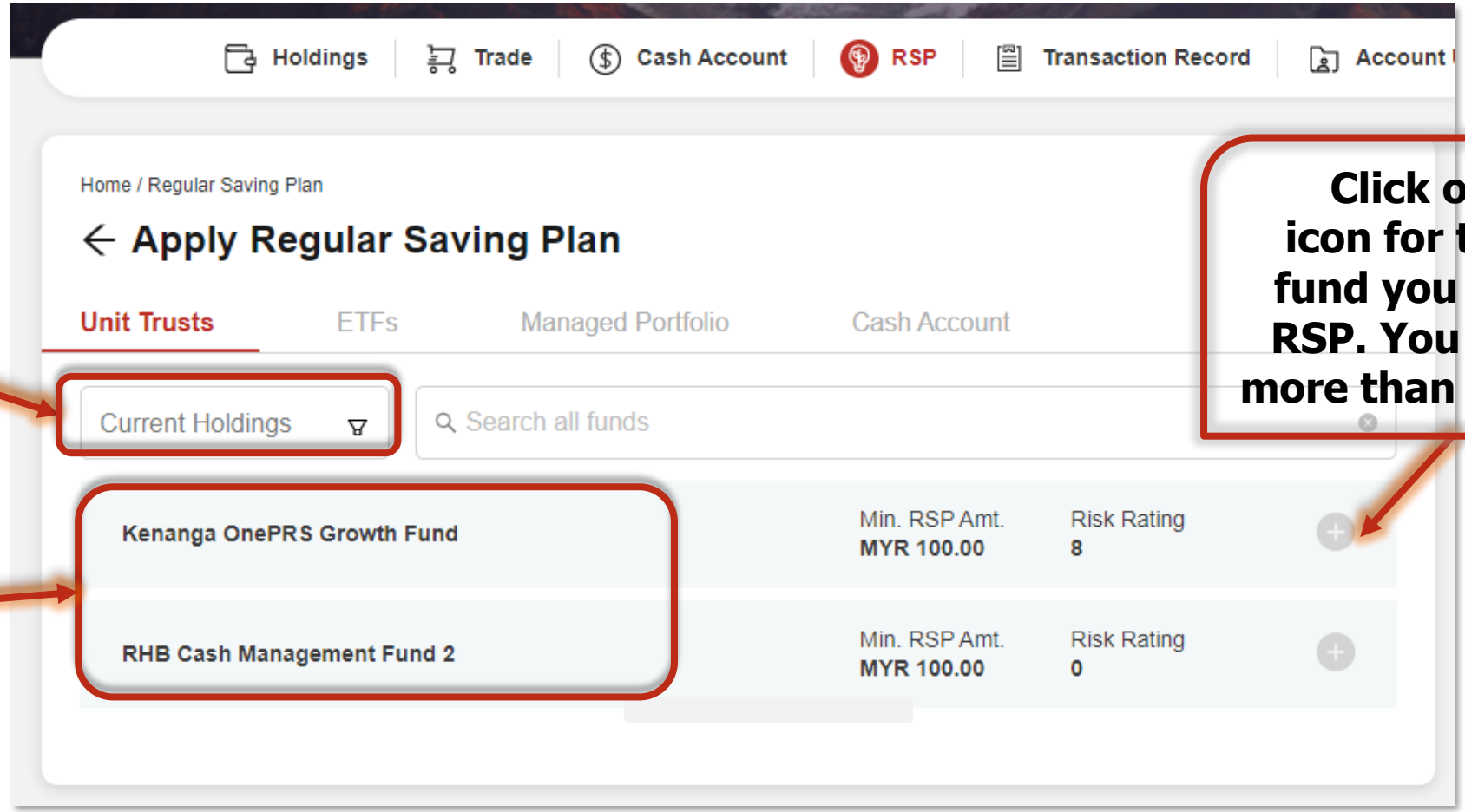
Step 1

- **Click on [Regular Savings Plan]**



RSP PRS funds on FSMOne

➲ Step 2 – RSP Current Holdings



1

Select [Current Holdings] filter

Your Current Holdings are displayed

2

Click on the ⊕ icon for the PRS fund you want to RSP. You can add more than one fund.

RSP for PRS funds on FSMOne

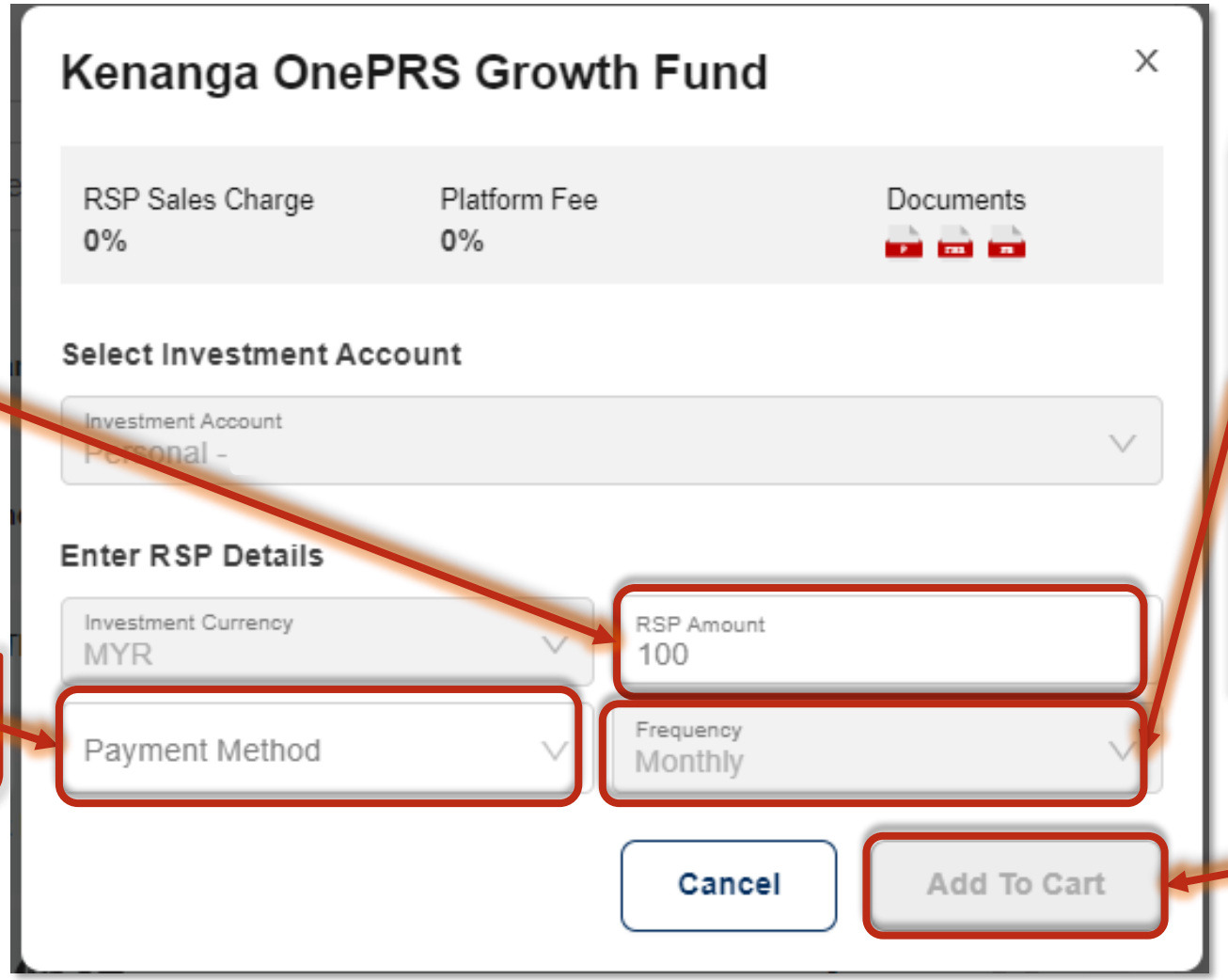
➲ Step 4

1

Select RSP Amount

2

Select Payment Method



3

Select Frequency

➢ **For Cash Account & CMF**
Monthly, Weekly, Bi-Weekly

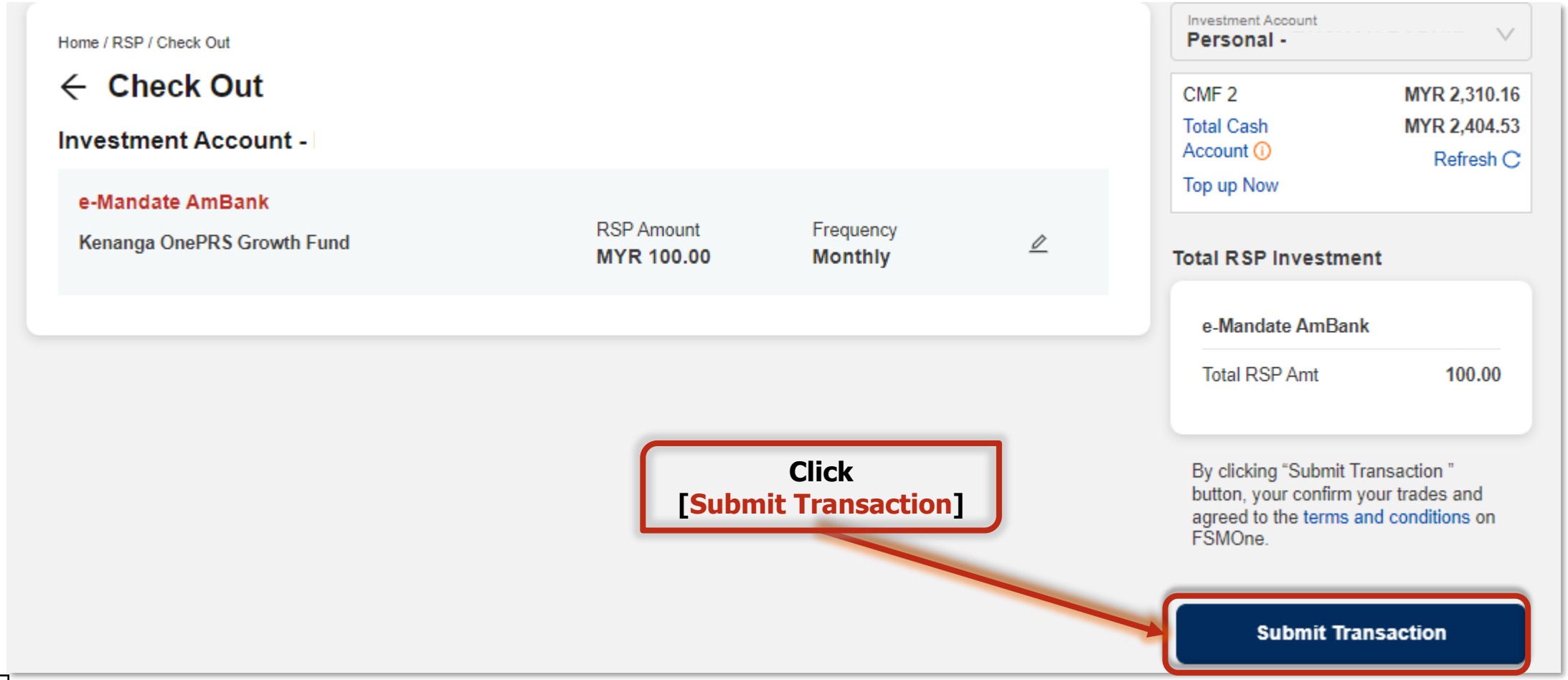
➢ **For FPX & Salary Account**
Monthly Only

4

Click [Add To Cart]

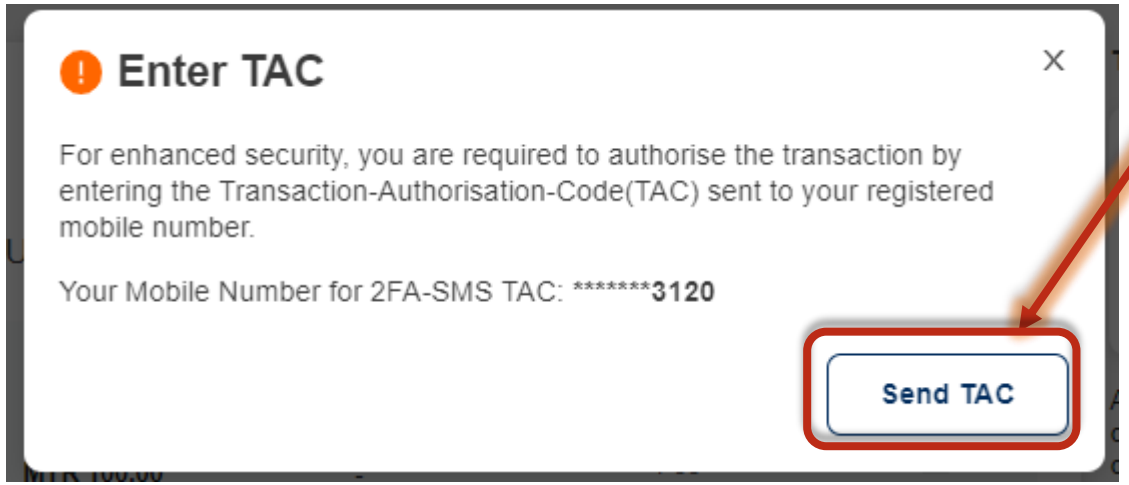
RSP for PRS funds on FSMOne

➲ Step 5

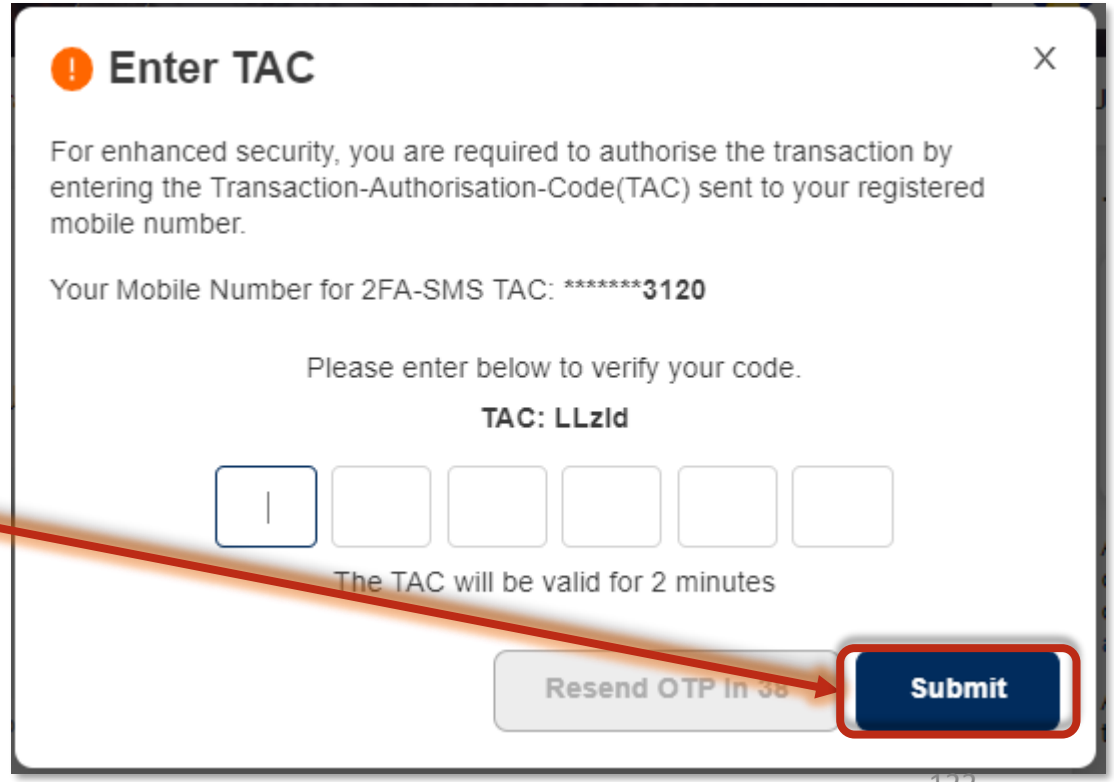


RSP for PRS funds on FSMOne

➲ Step 6



Click [Send TAC]



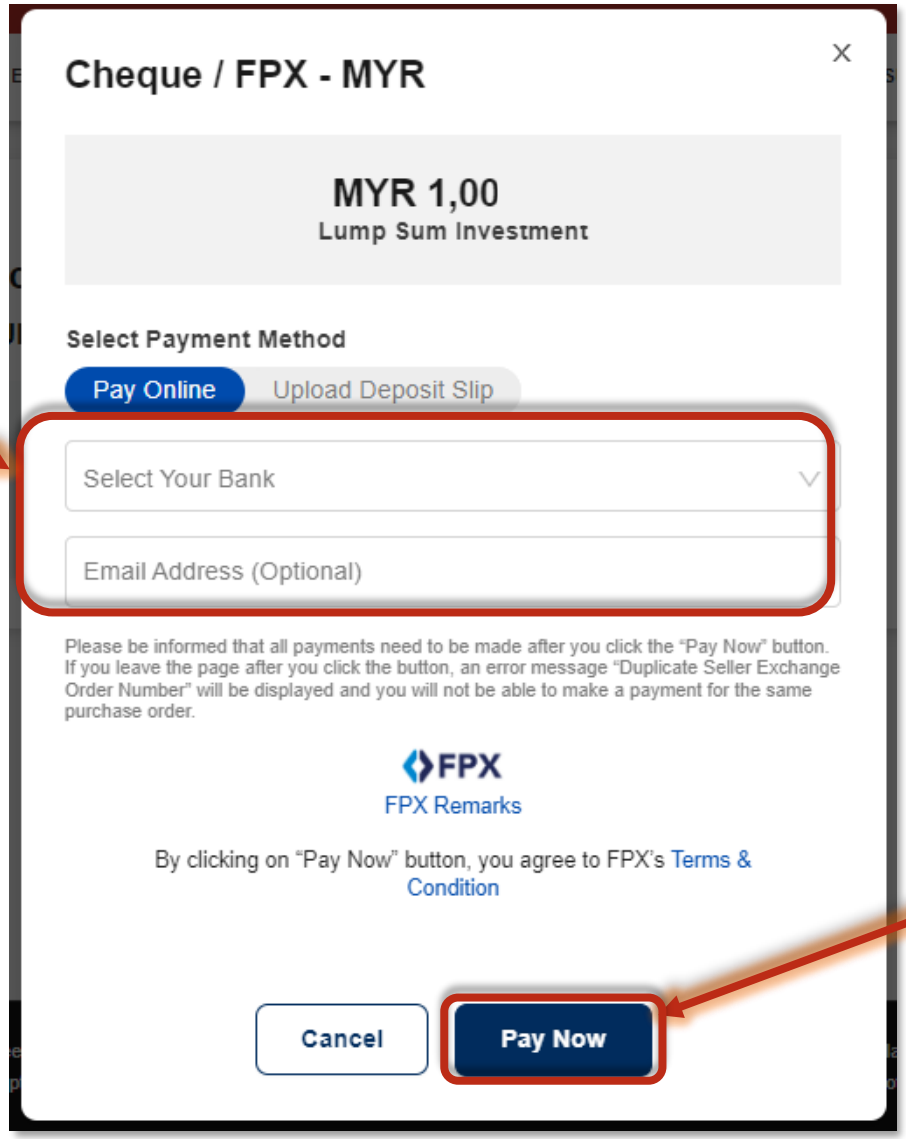
Enter TAC and Click [Submit]

RSP for PRS funds on FSMOne

➲ Step 7

1

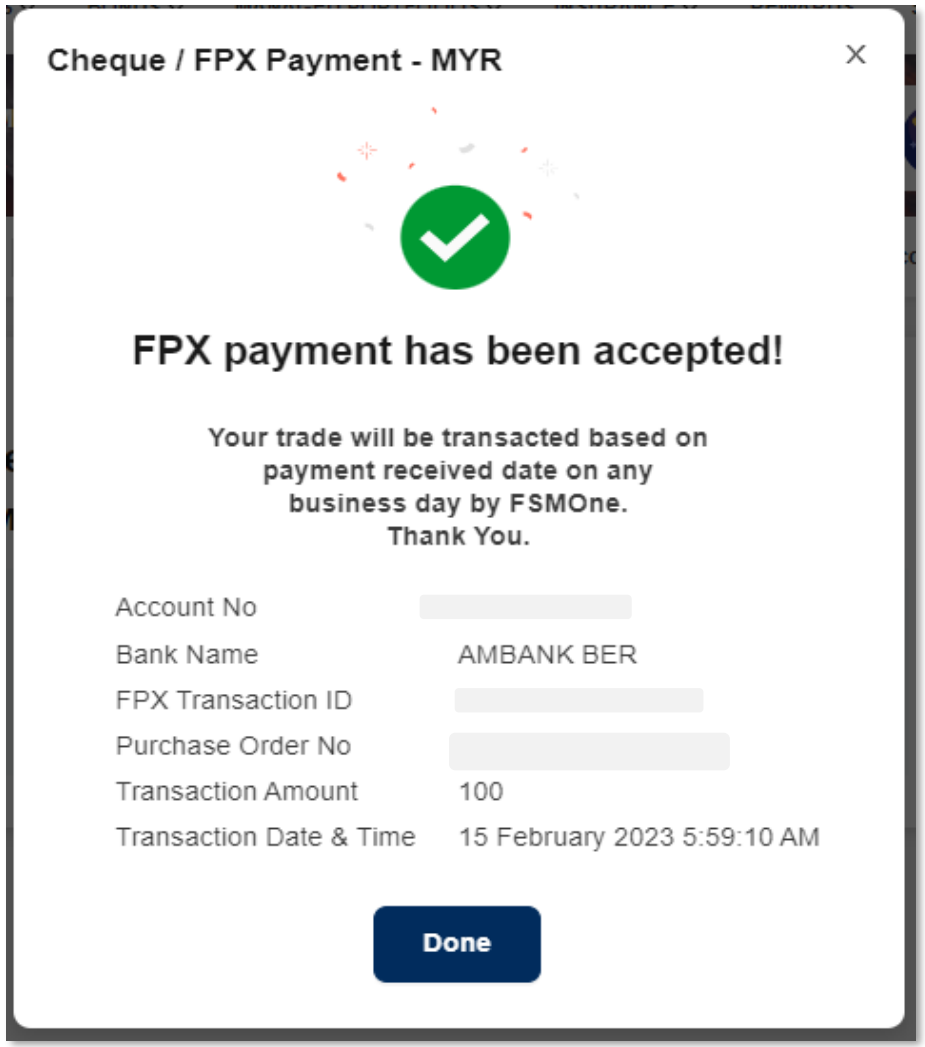
Enter Bank Details



2

Click [Pay Now] to make payment

RSP for PRS funds on FSMOne



FSMOne step by step guide

Buy EPF-Approved Unit Trust Fund through i-Akaun (i-Invest)

BUY

Buying via EPF i-Invest Website

➲ Step 1

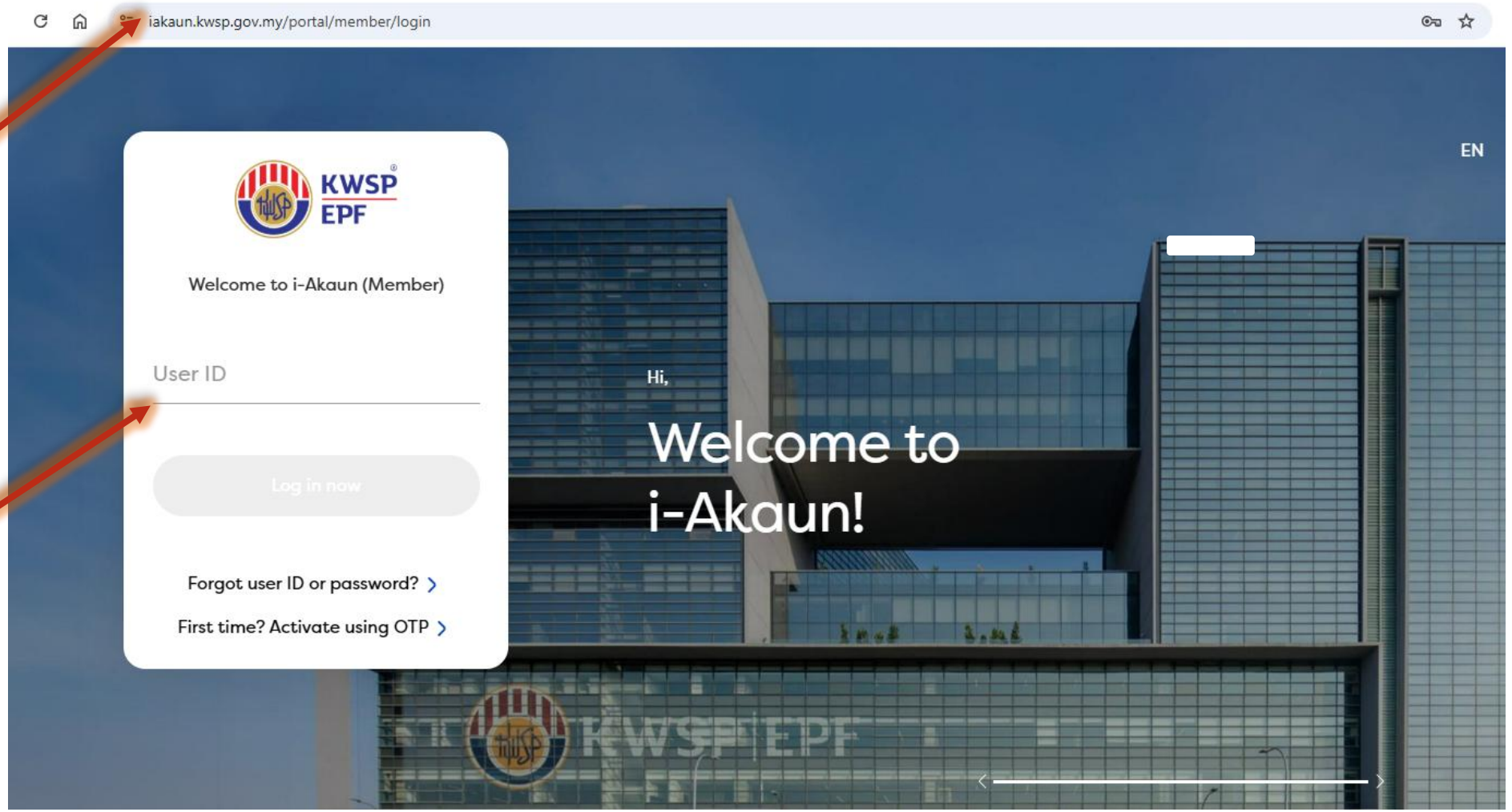
- Login to your EPF i-Akaun (Member) (https://iakaun.kwsp.gov.my/portal/member/login)

1

Browse EPF official website

2

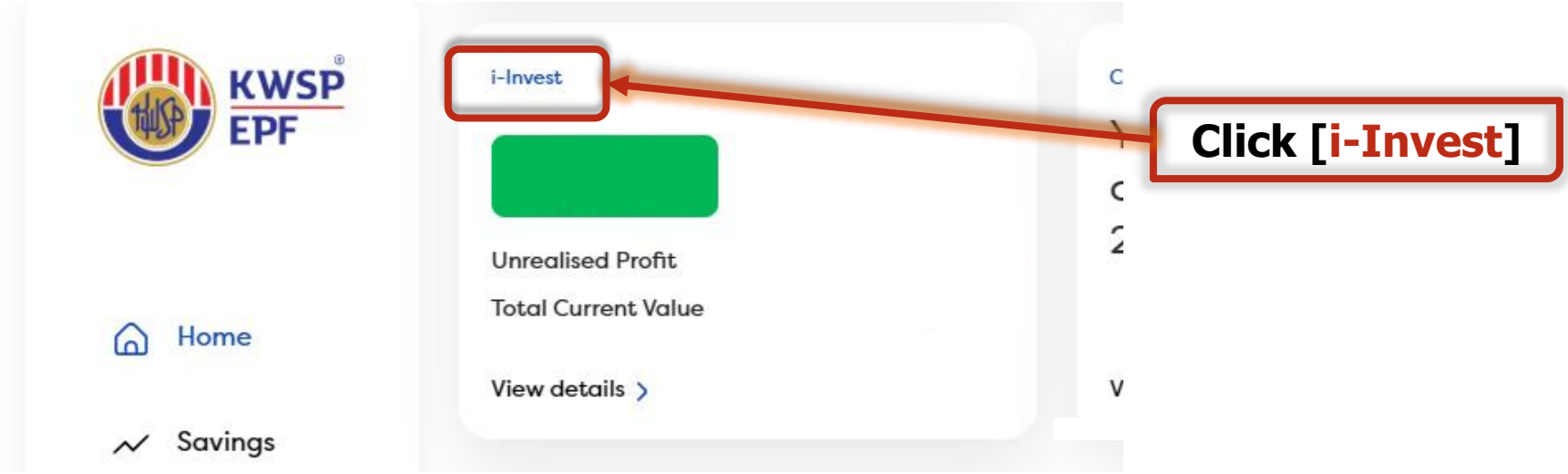
Log in using your User ID and password



Buying via EPF i-Invest Website

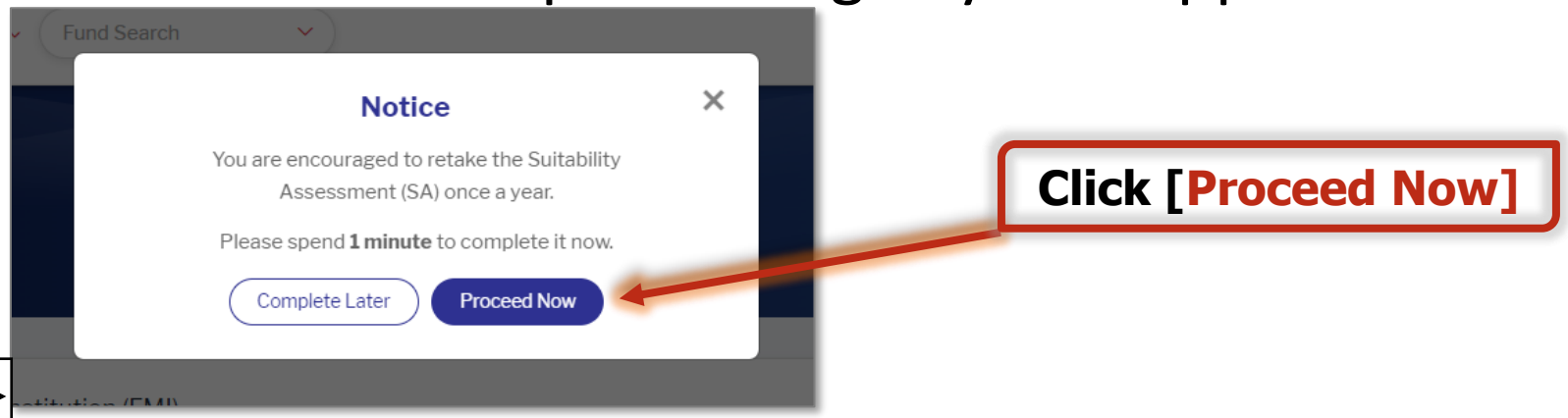
➲ Step 2

- Click [i-Invest].



➲ Step 3

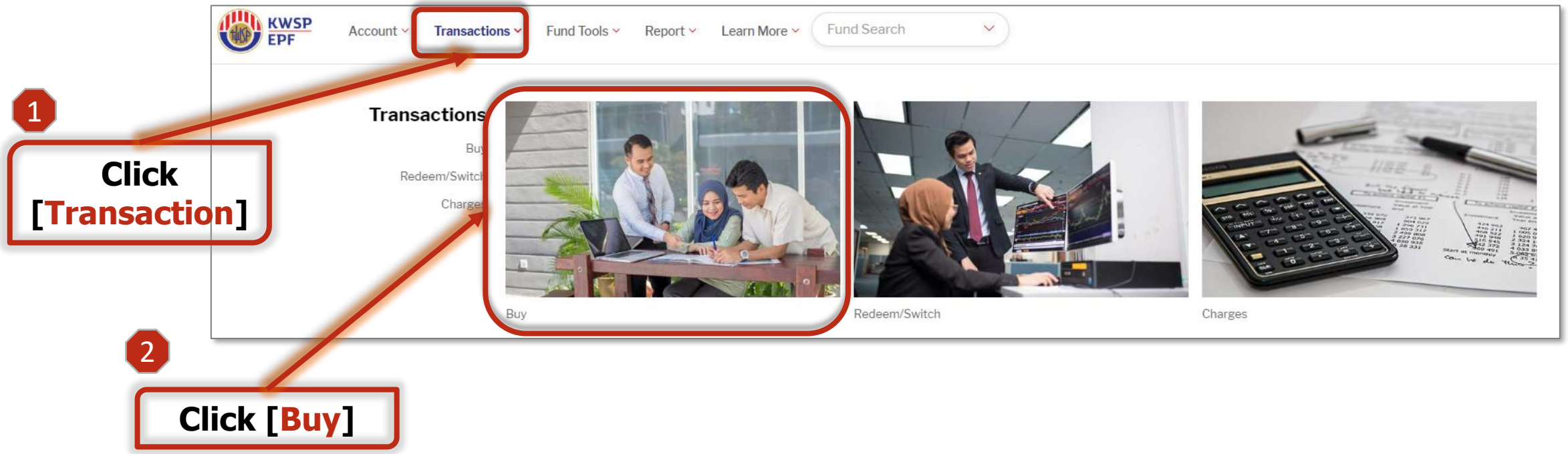
- Take the Suitability Assessment (SA) to check your risk profile and tolerance before purchasing any EPF-Approved unit trust(s).



Buying via EPF i-Invest Website

➲ Step 3

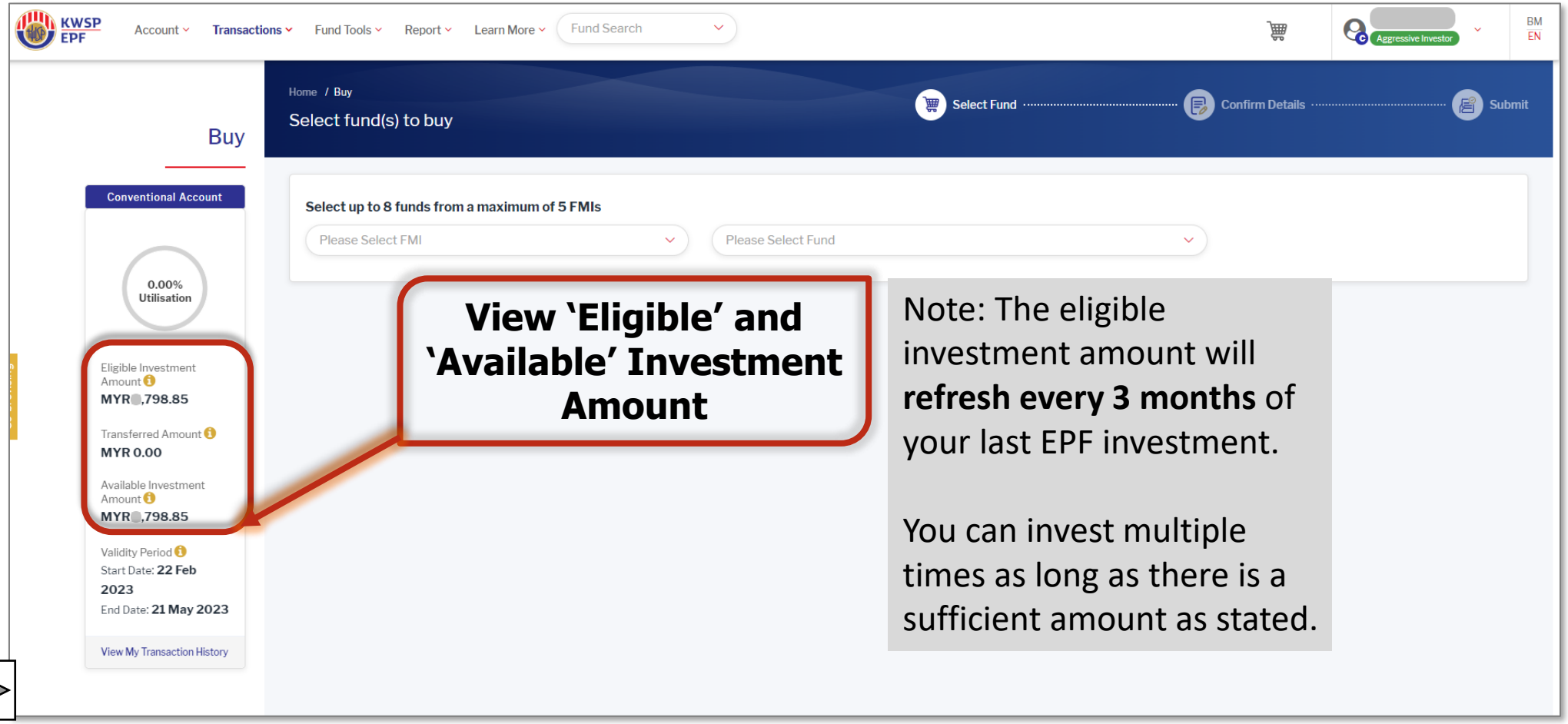
- Under the i-Invest page, click **Transactions > Buy**.



Buying via EPF i-Invest Website

➲ Step 4

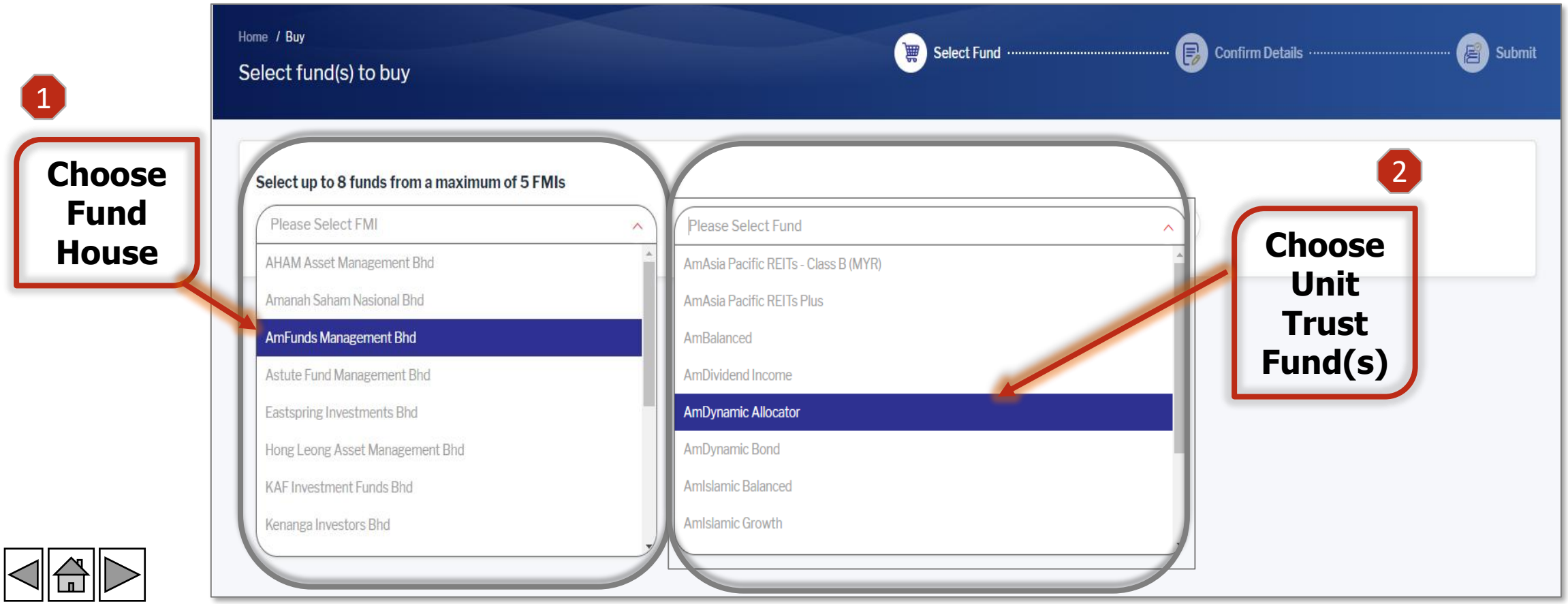
- View your **eligible** and **available** investment amount.



Buying via EPF i-Invest Website

➲ Step 5

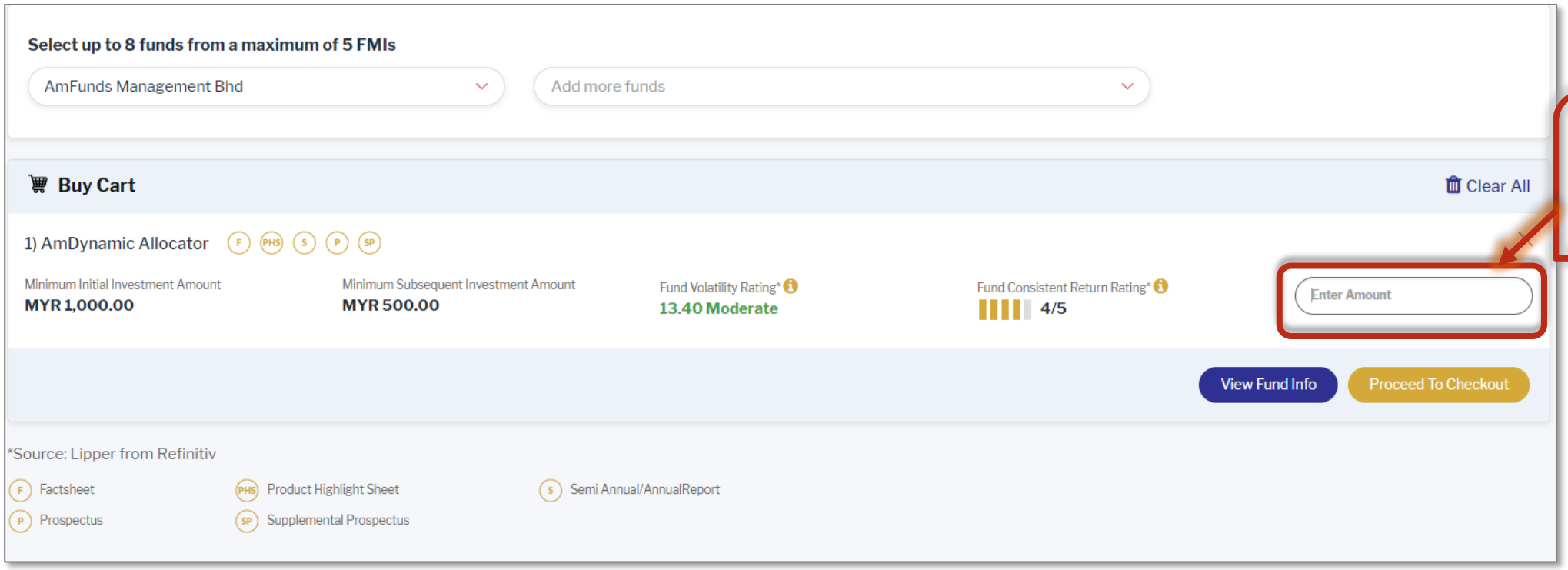
- Select the preferred Fund House > Unit Trust Fund(s) that you would like to purchase (*refer to the example below*).



Buying via EPF i-Invest Website

➲ Step 6

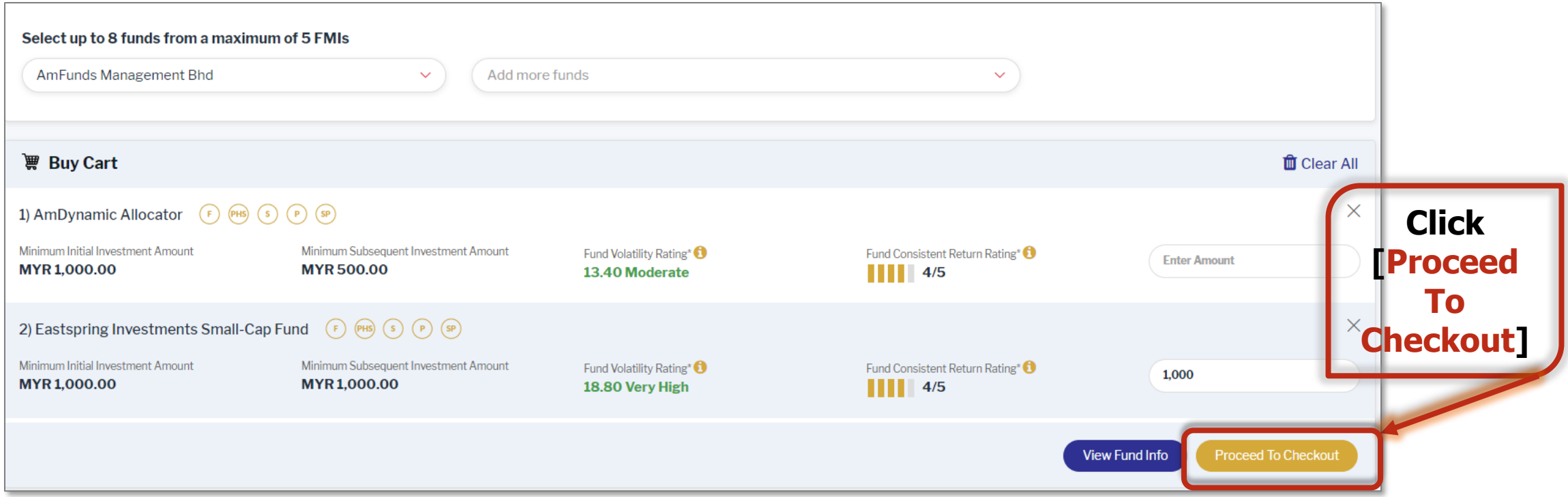
- Enter ‘Minimum Initial Investment Amount’ or ‘Minimum Subsequent Investment Amount’.



Buying via EPF i-Invest Website

➲ Step 7

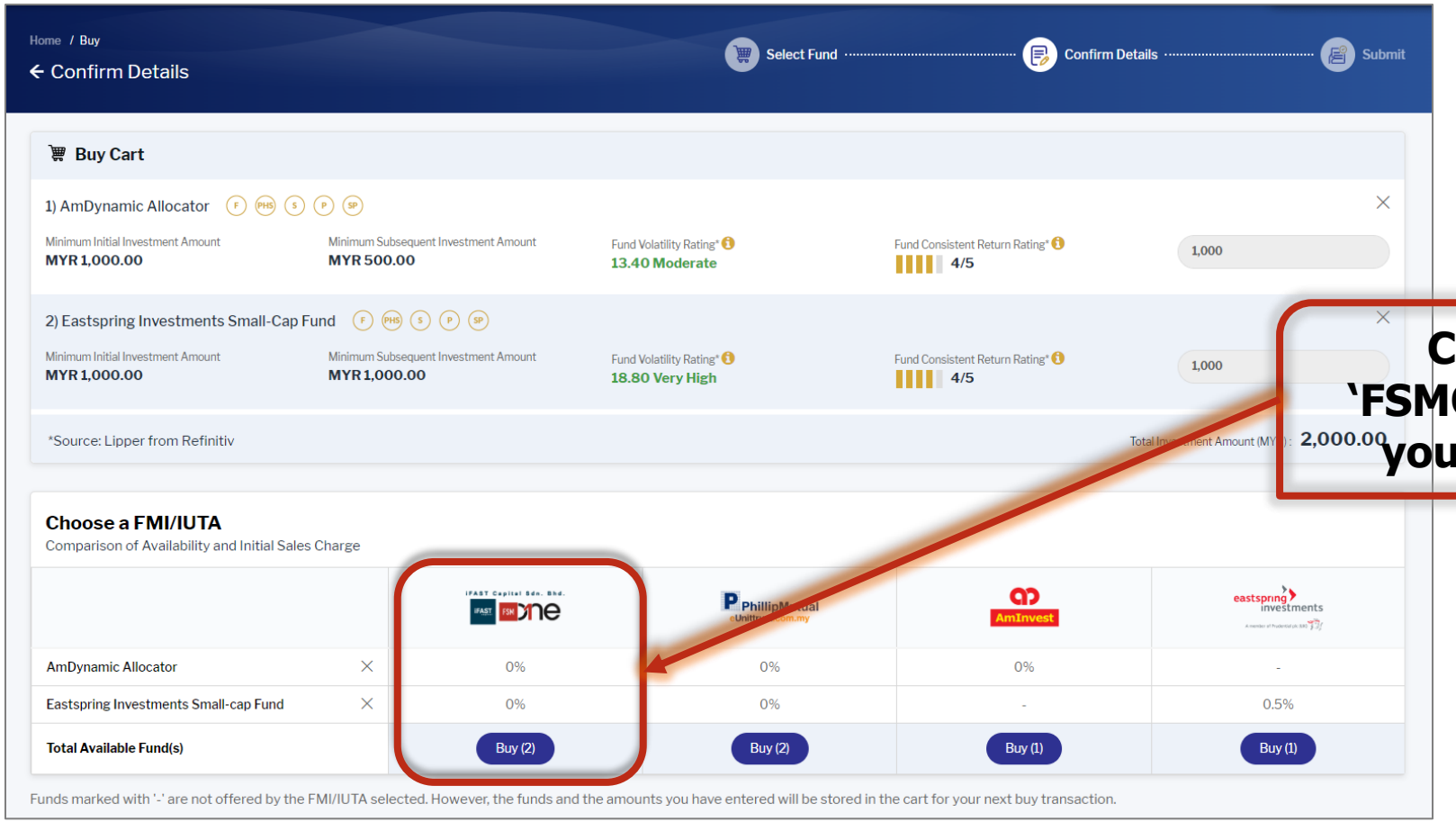
- You may add up to 8 unit trust funds from the maximum of 5 Fund Houses, then click [Proceed To Checkout].



Buying via EPF i-Invest Website

➲ Step 8

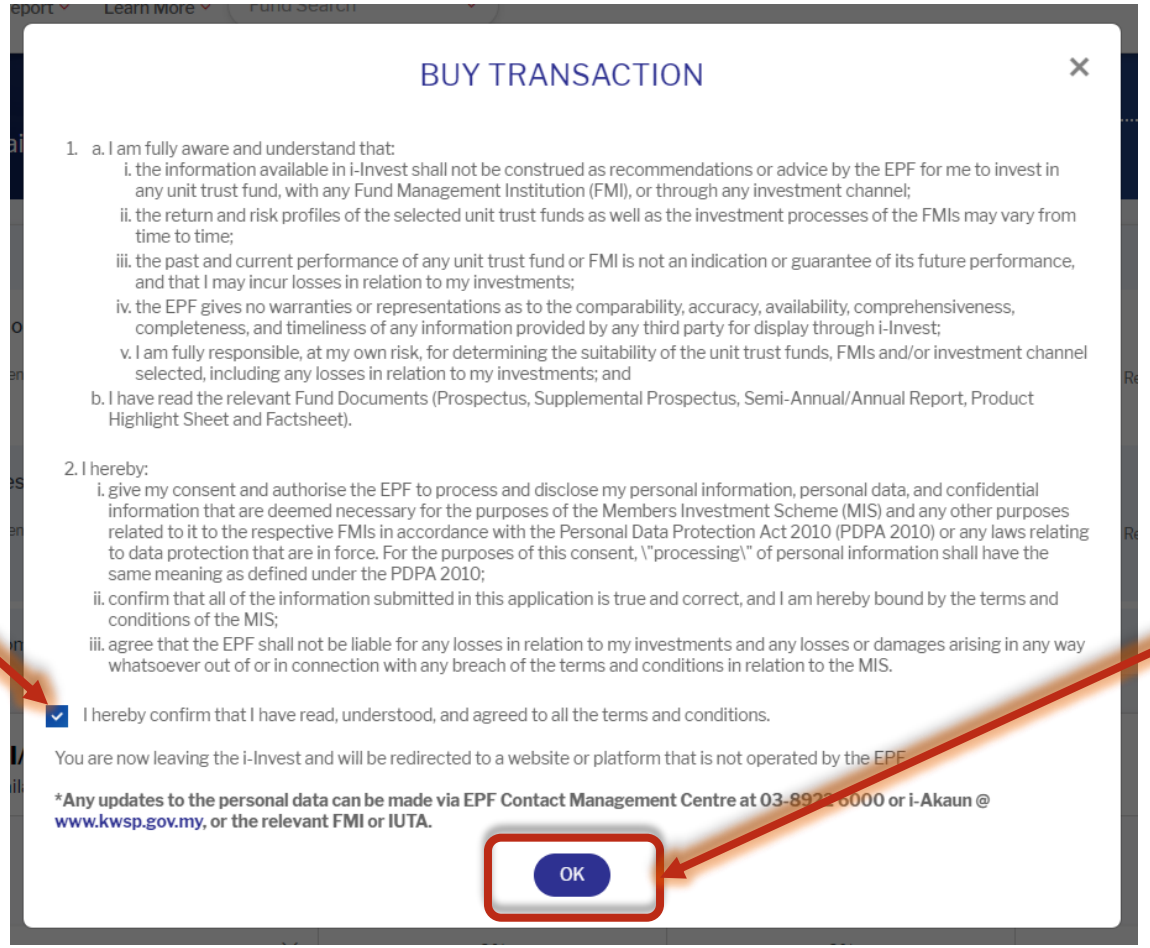
- Select “FSMOne” (*the online unit trust distribution arm of iFast Capital Sdn Bhd*) as your Fund Management Institution (FMI) after choosing your preferred fund(s).



Buying via EPF i-Invest Website

➲ Step 9

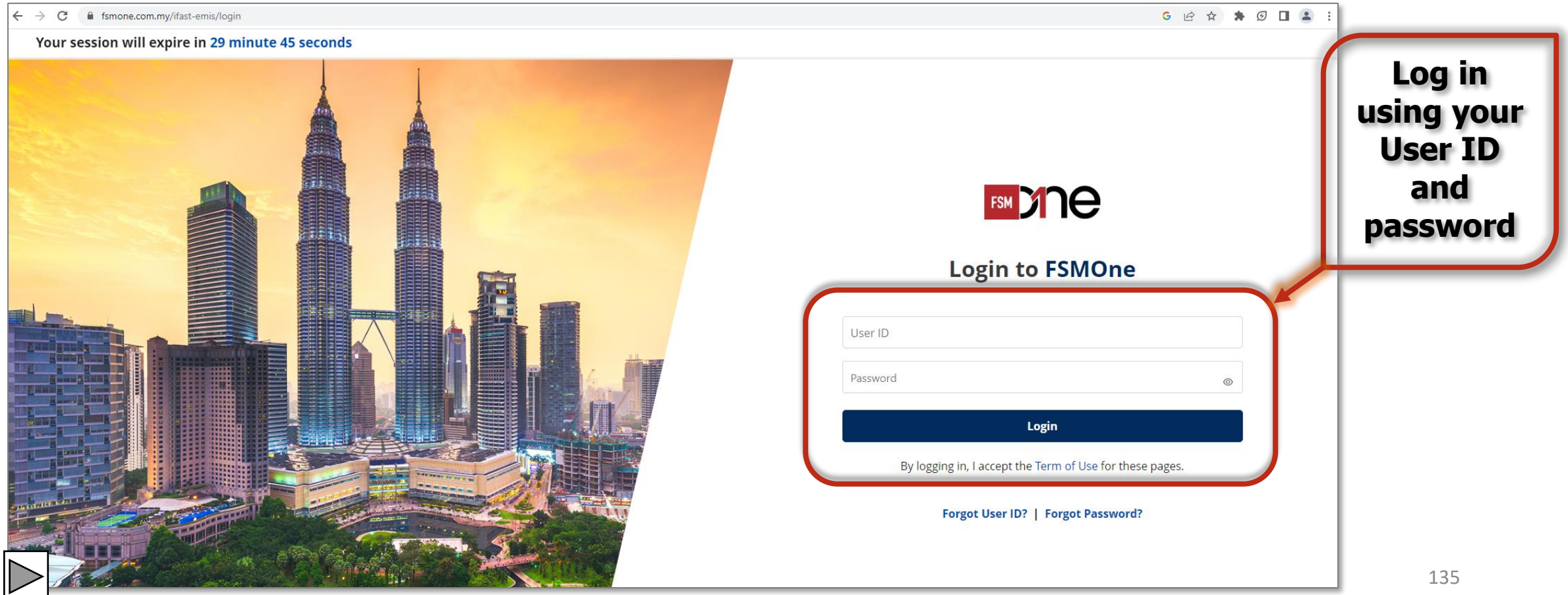
- Read and Agree to the T&C, then proceed to click [OK].



Buying via EPF i-Invest Website

➲ Step 10

- It will re-direct you to FSMOne page. Log in your investment account.



Buying via EPF i-Invest Website

➲ Step 11

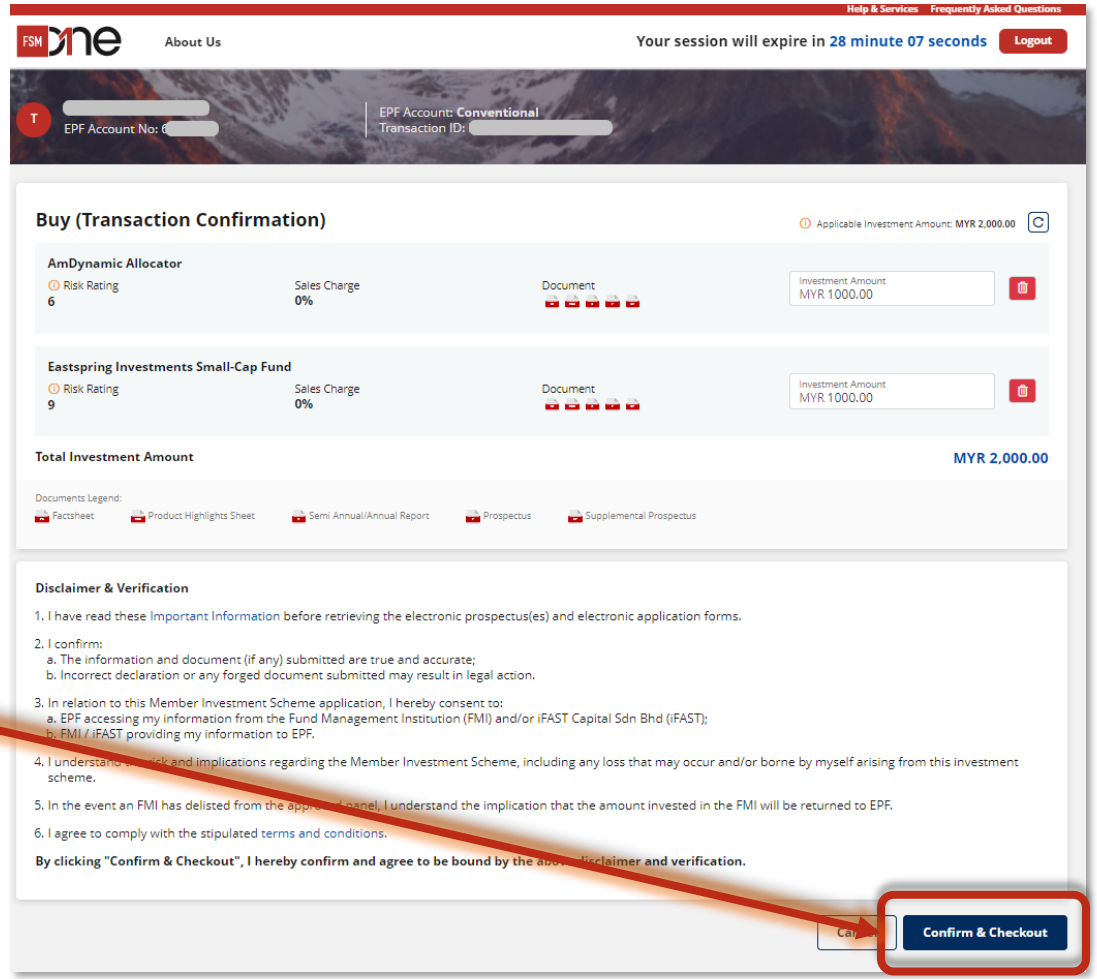
- Check your buy transaction is displayed correctly before clicking [Confirm & Checkout].

Generally, the fund house would require T+3 business days to process and complete the transaction.

Once the transaction cycle is completed, your units will appear in your holdings.

1

Click [Confirm & Checkout]



FSMOne step by step guide

Sell EPF-Approved Unit Trust Fund through i-Akaun (i-Invest)

Selling via EPF i-Invest Website

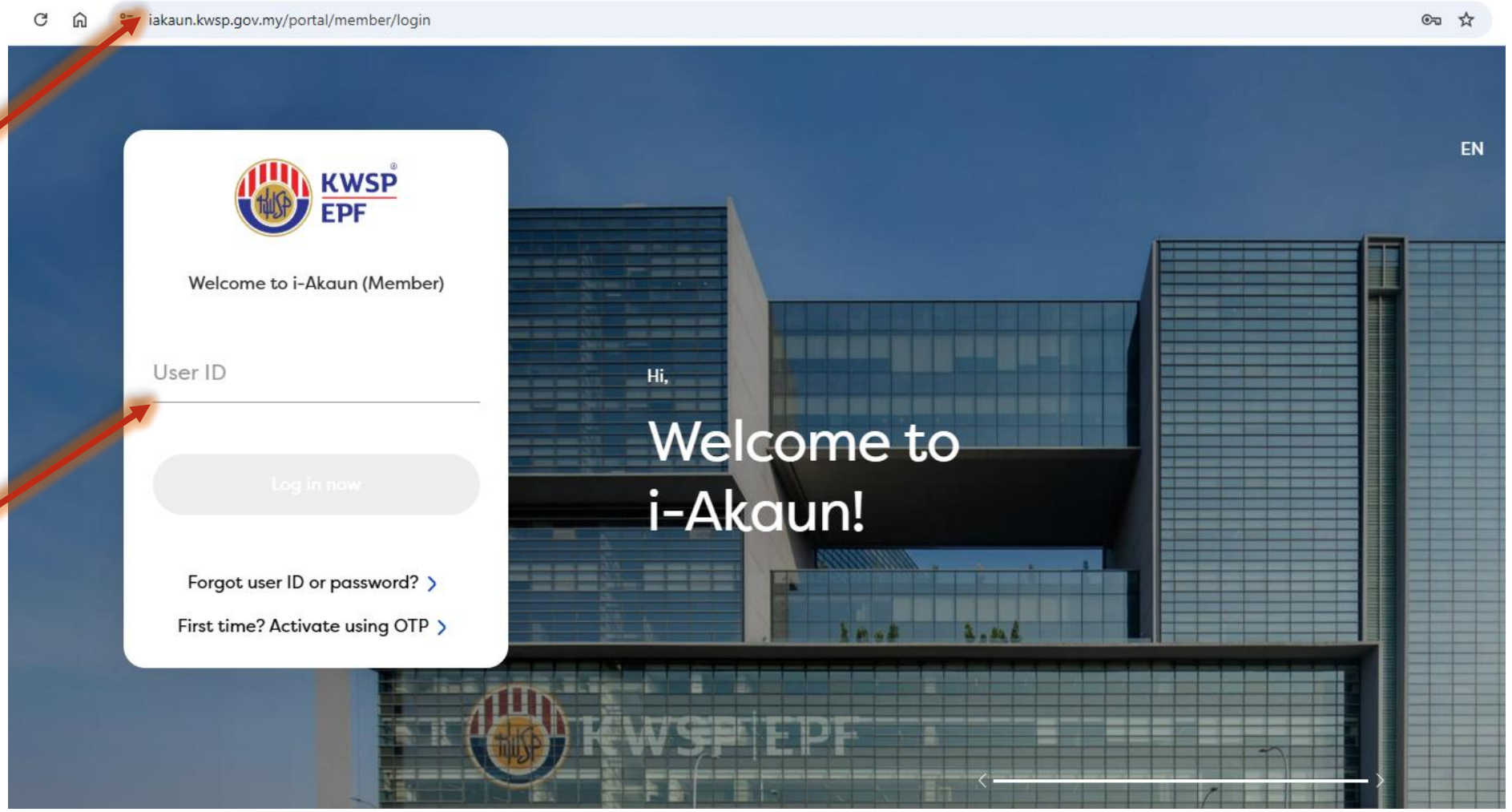
➲ **Step 1** Login to your EPF i-Akaun (Member) (https://iakaun.kwsp.gov.my/portal/member/login)

1

Browse EPF official website

2

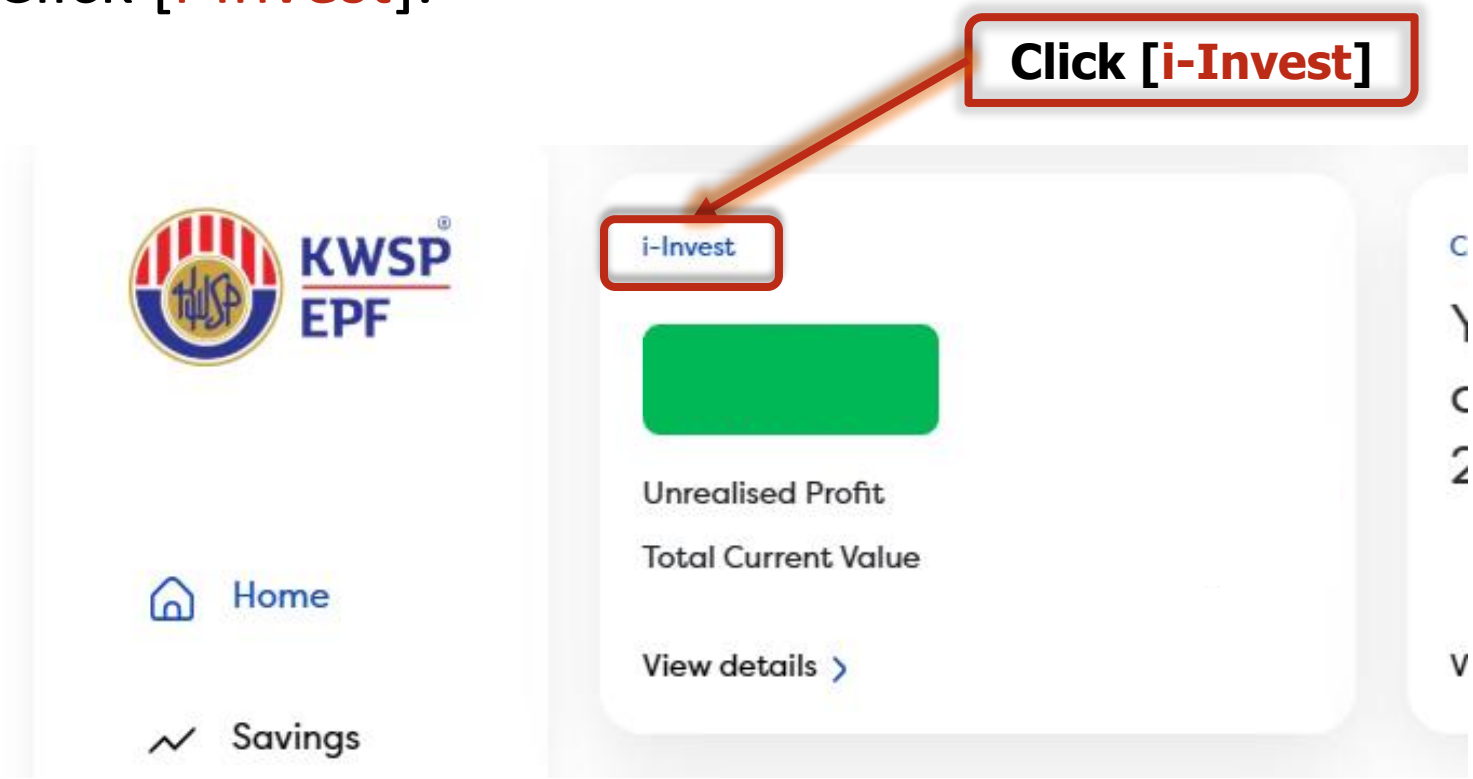
Log in using your User ID and password



Selling via EPF i-Invest Website

➲ Step 2

- Click [i-Invest].



Selling via EPF i-Invest Website

➲ Step 3

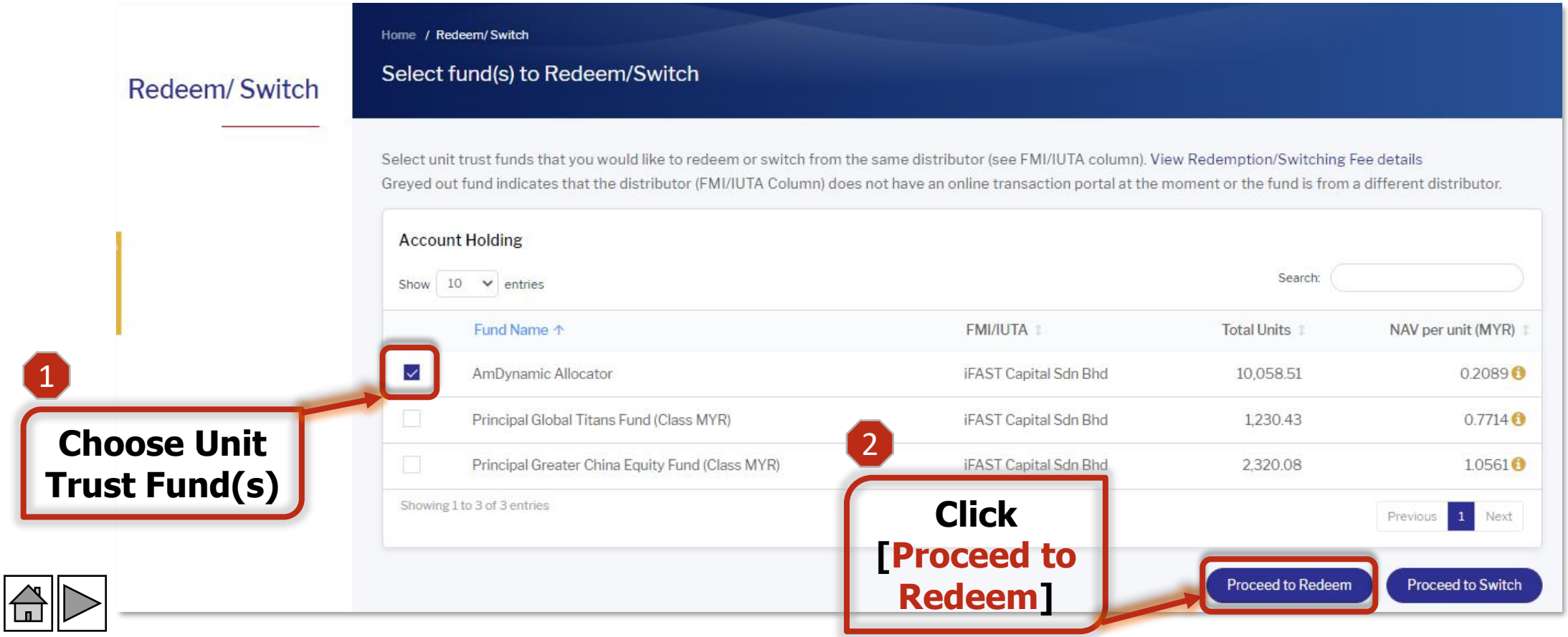
- Under the i-Invest page, click **Transactions > Redeem/Switch**.



Selling via EPF i-Invest Website

➲ Step 4

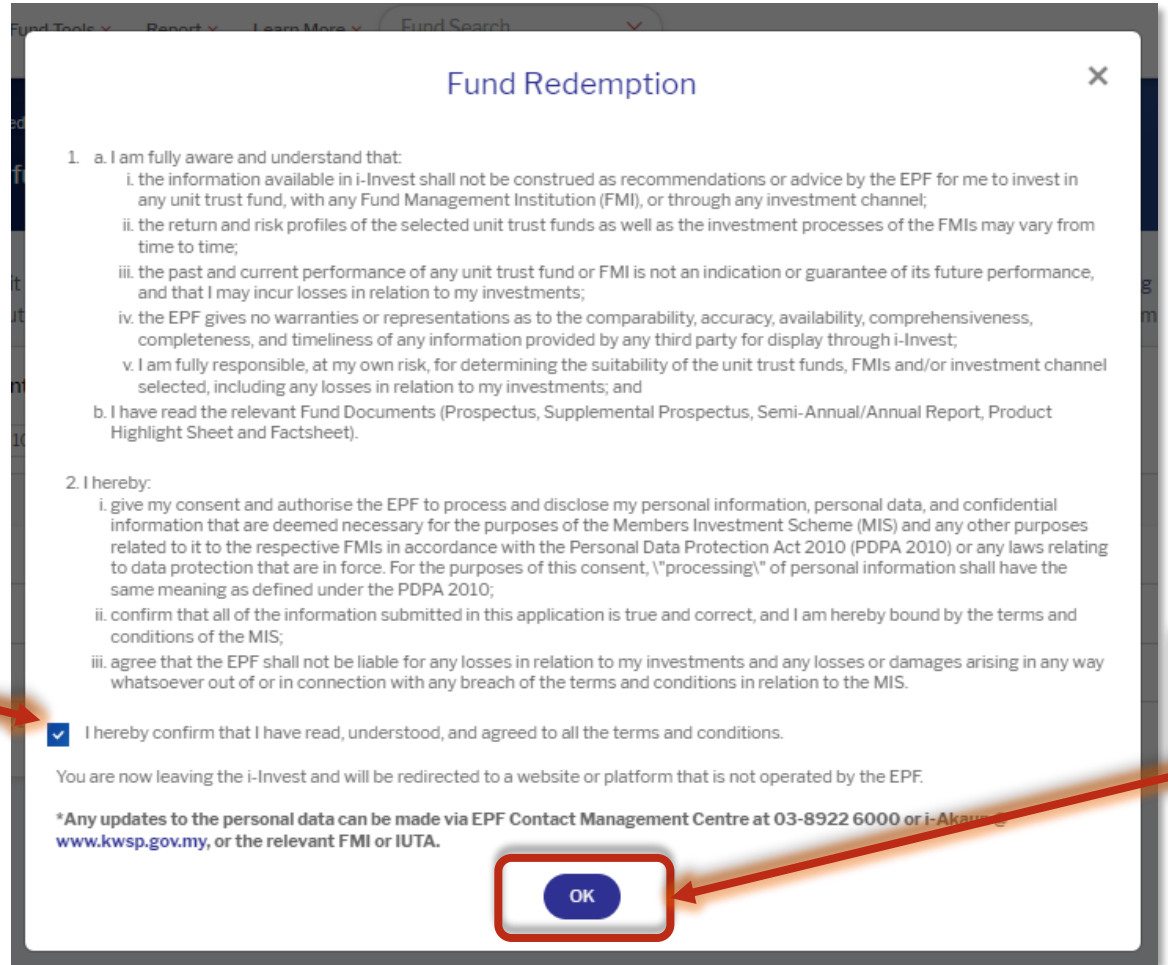
- Select the preferred Fund House > Unit Trust Fund(s) that you would like to redeem/sell (refer the example below).



Selling via EPF i-Invest Website

➲ Step 5

- Read and Agree to the T&C, then proceed to click [OK].



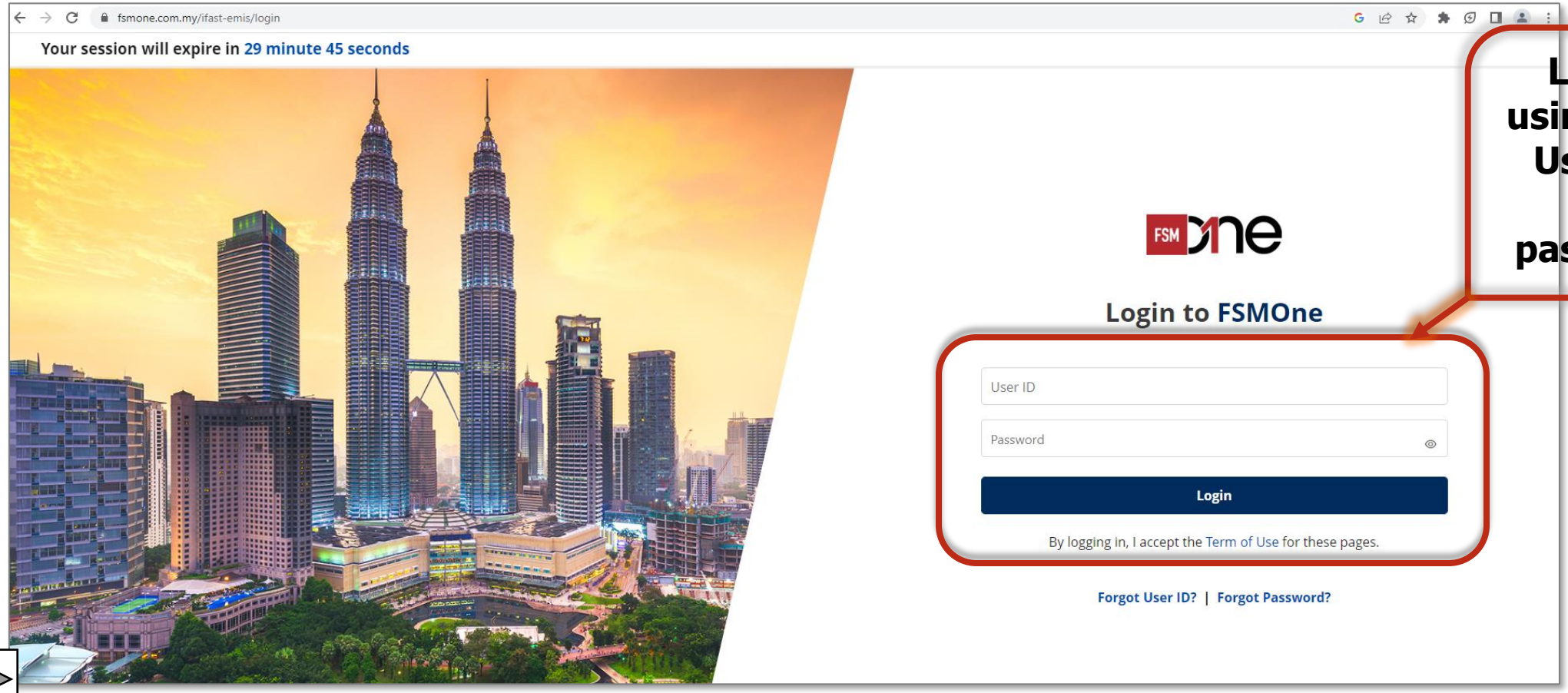
1 **Check the box**

2 **Click [OK]**

Selling via EPF i-Invest Website

➲ Step 6

- It will re-direct you to FSMOne page. Log in your investment account.



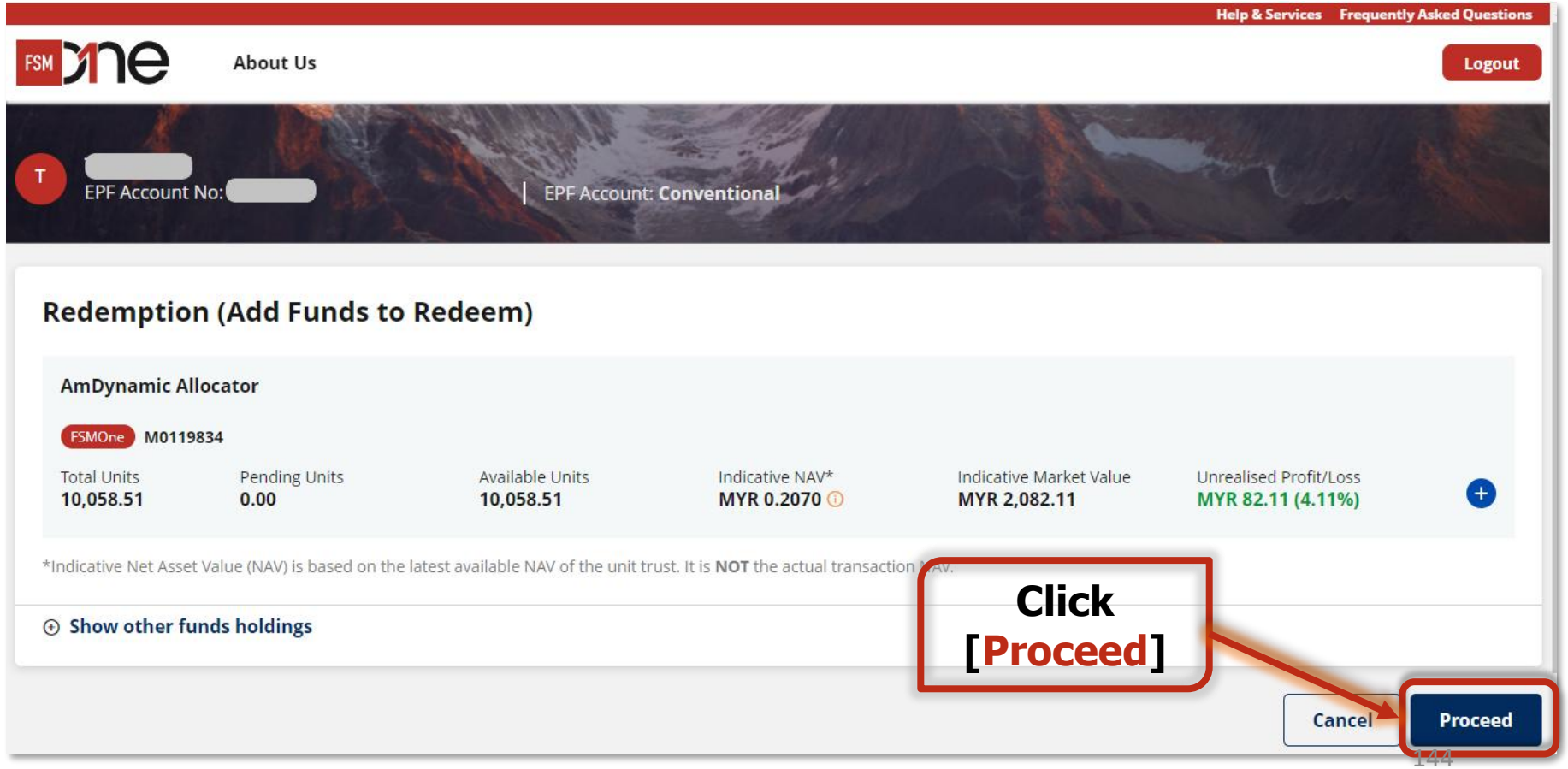
Selling via EPF i-Invest Website

➲ Step 7

- Check your sell transaction is displayed correctly before clicking [Proceed].

Generally, the fund house would require T+10 business days to process and complete the sell transaction.

Once the transaction cycle is completed, your units will appear in your holdings.



FSMOne step by step guide

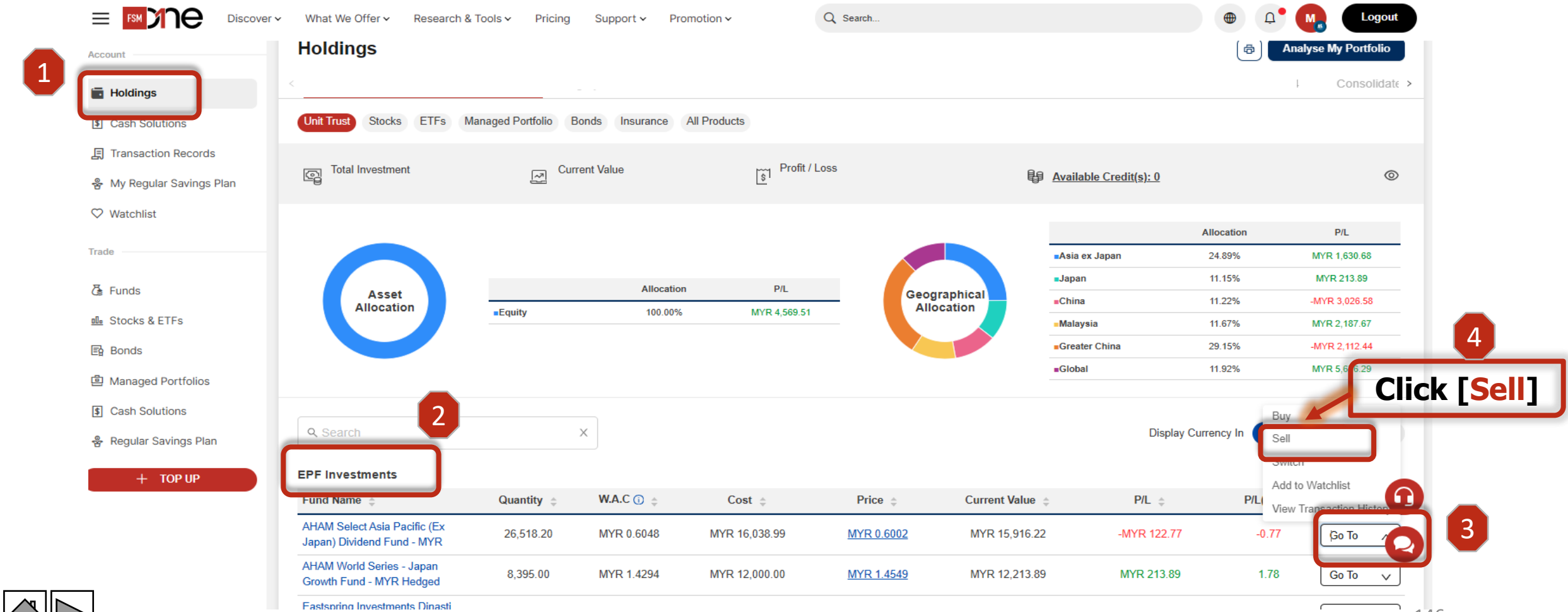
Sell EPF-Approved Unit Trust Fund

Through FSMOne platform

Selling via FSMOne Platform

Step 1

- Log in to your FSMOne account, go to Holding> EPF Investments> Actions> Go to> Click [Sell].

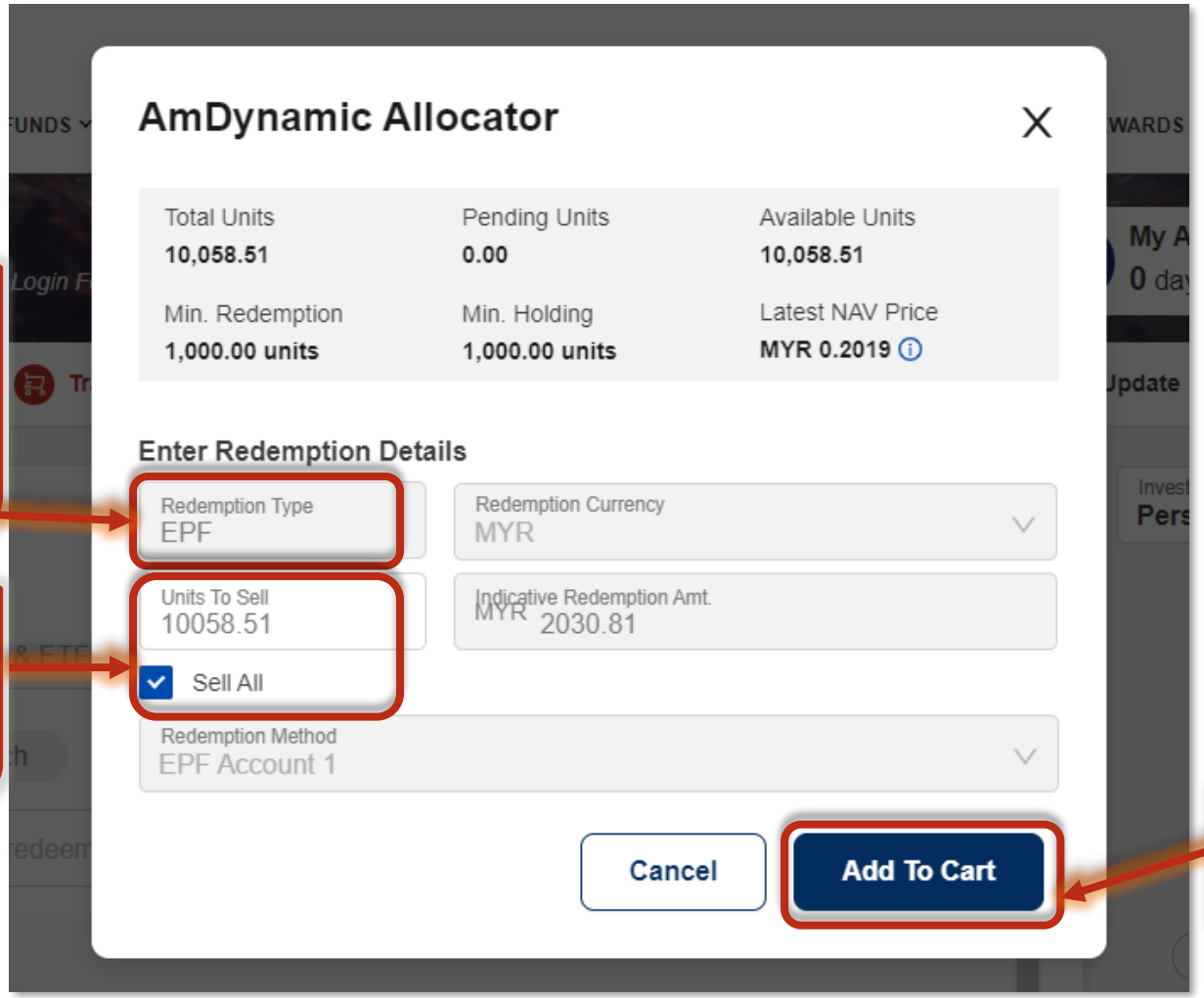


Selling via FSMOne Platform

➲ Step 2

1 **Make sure the Redemption Type is [EPF]**

2 **Indicate 'Units To Sell' or 'Sell All'**

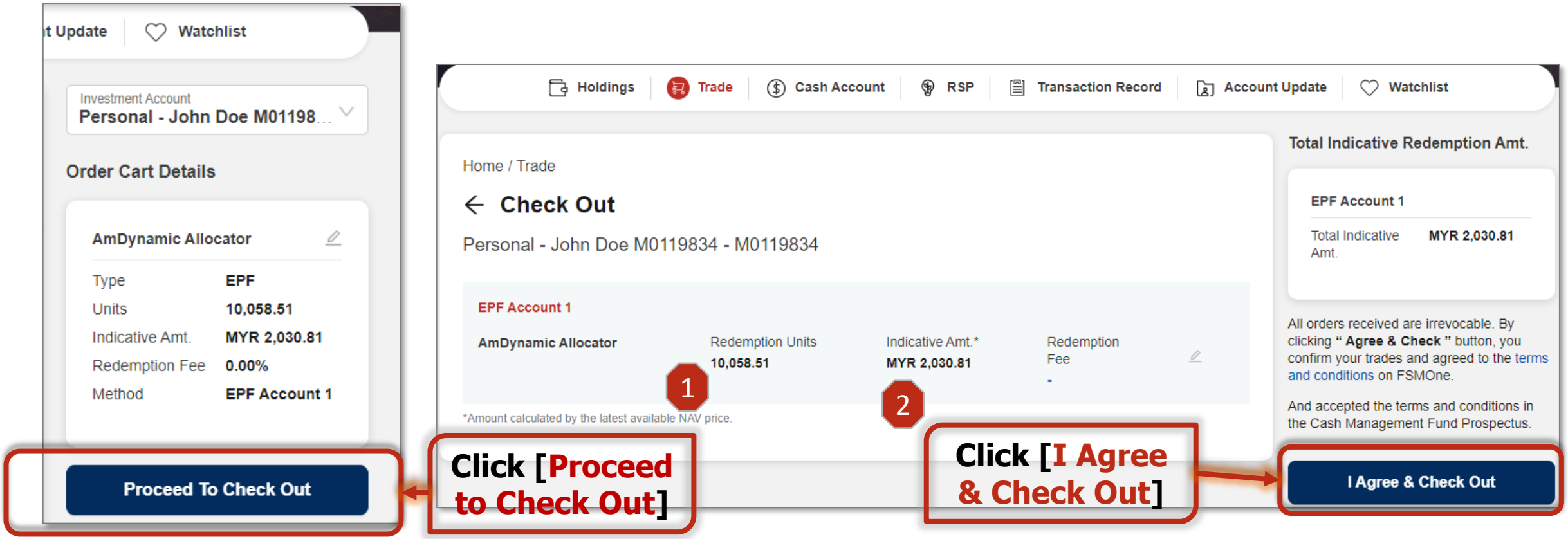


3 **Click [Add to Cart]**

Selling via FSMOne Platform

➲ Step 3

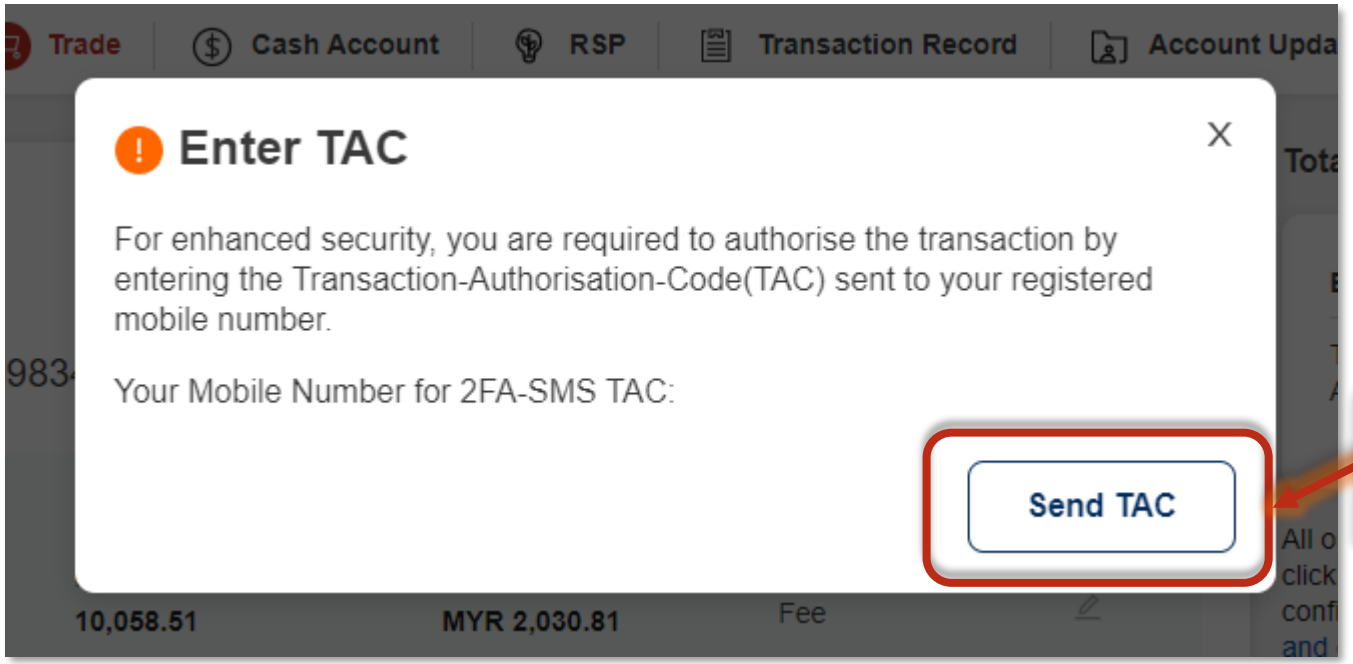
- Check your sell transaction is displayed correctly before clicking [Proceed to Check Out], thereafter click [I Agree & Check Out].



Selling via FSMOne Platform

➲ Step 4

- Enter the TAC after clicking [Send Tac] to proceed to Sell the fund.



Click [Send TAC]

Generally, the fund house would require T+10 business days to process and complete the sell transaction.

Once the transaction cycle is completed, your units will appear in your holdings.

FSMOne step by step guide

Switching EPF-Approved Unit Trust Fund through i-Akaun (i-Invest)

Switching via EPF i-Invest Website

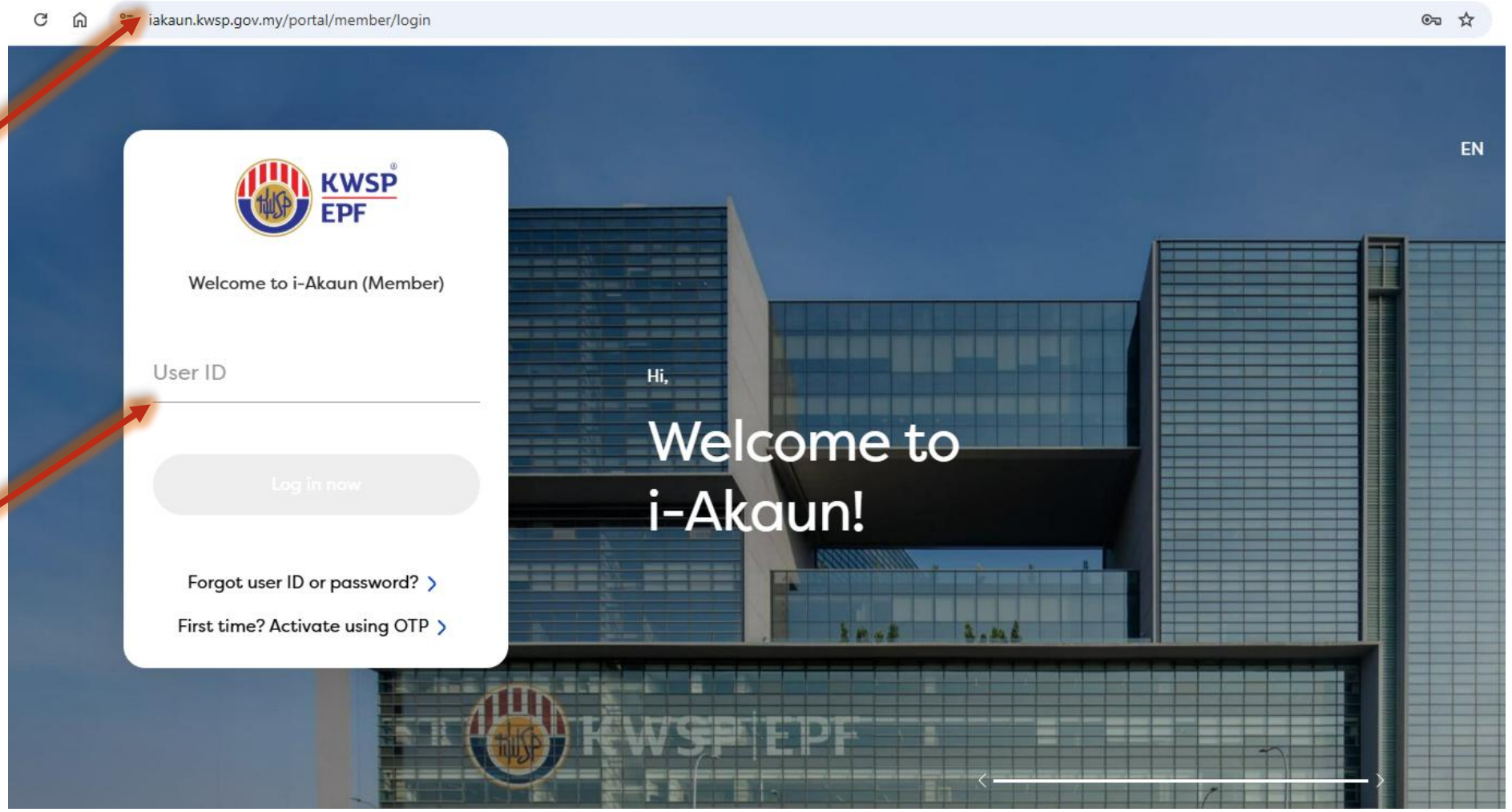
➲ **Step 1** Login to your EPF i-Akaun (Member) (https://iakaun.kwsp.gov.my/portal/member/login)

1

Browse EPF official website

2

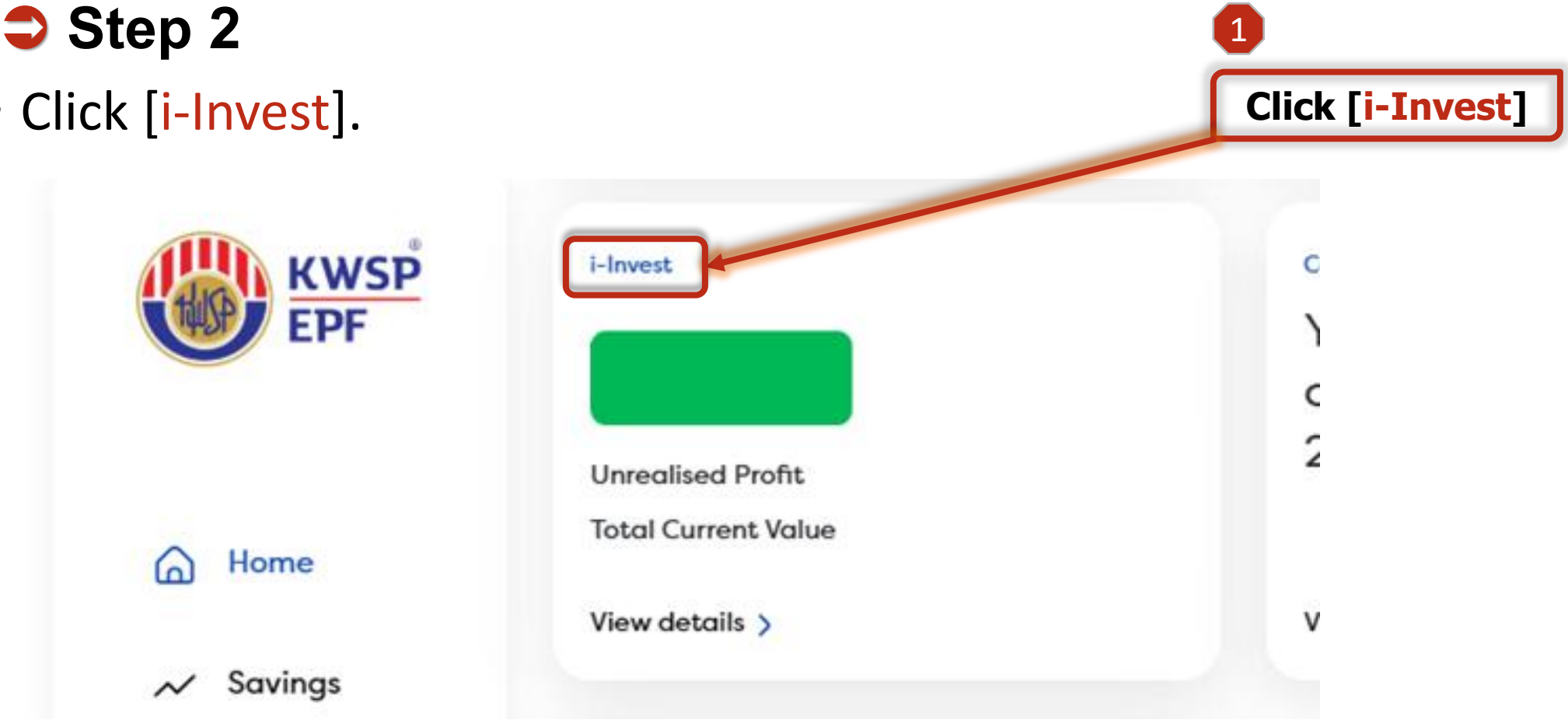
Log in using your User ID and password



Switching via EPF i-Invest Website

➲ Step 2

- Click [i-Invest].



Switching via EPF i-Invest Website

➲ Step 3

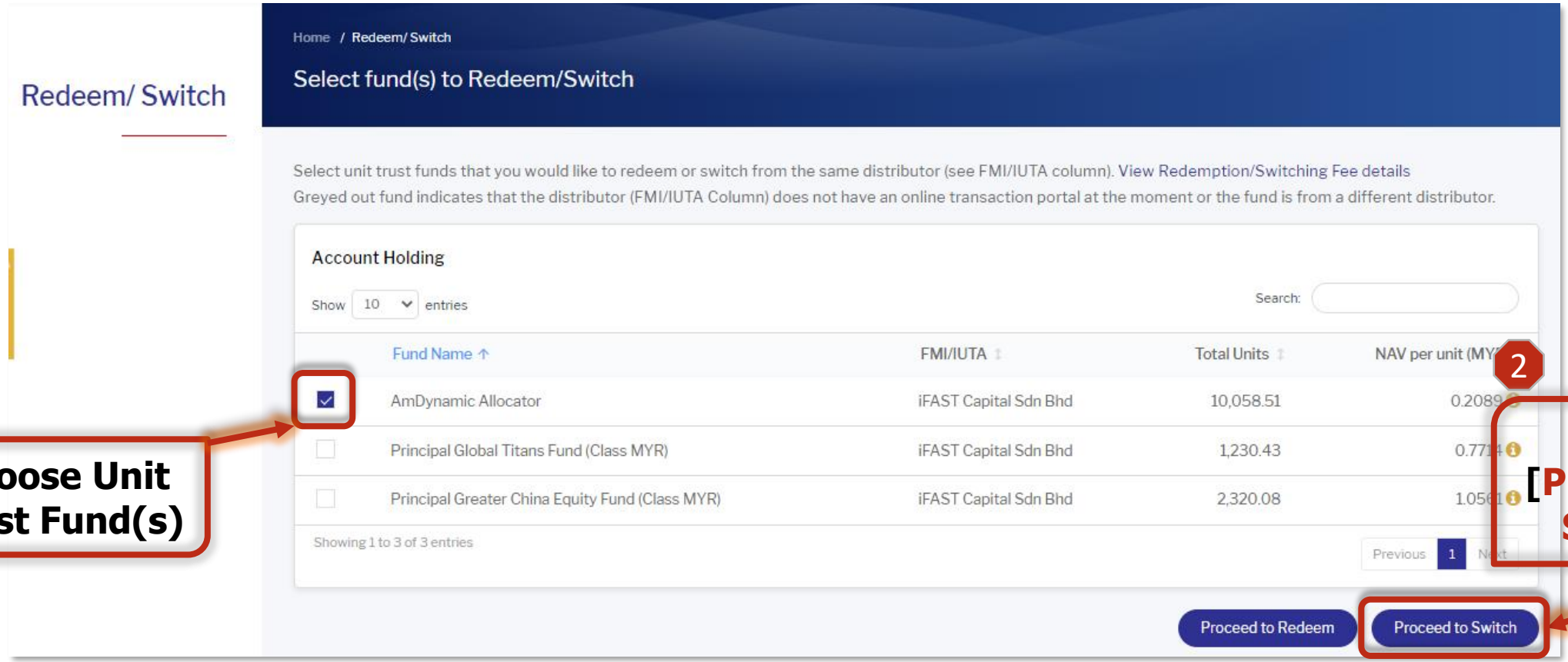
- Under the i-Invest page, click **Transactions > Redeem/Switch**.



Switching via EPF i-Invest Website

➲ Step 4

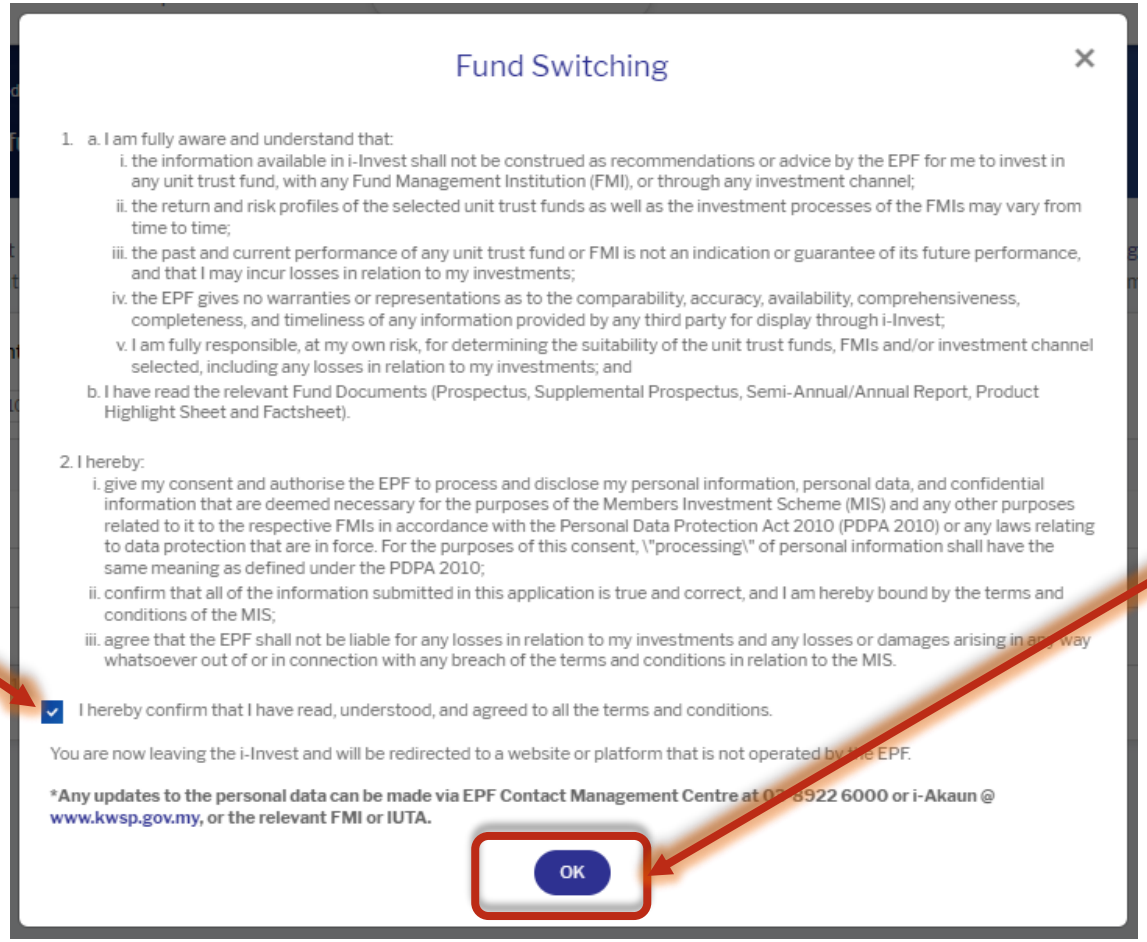
- Select the preferred Fund House > Unit Trust Fund(s) that you would like to switch (refer the example below).



Switching via EPF i-Invest Website

➲ Step 5

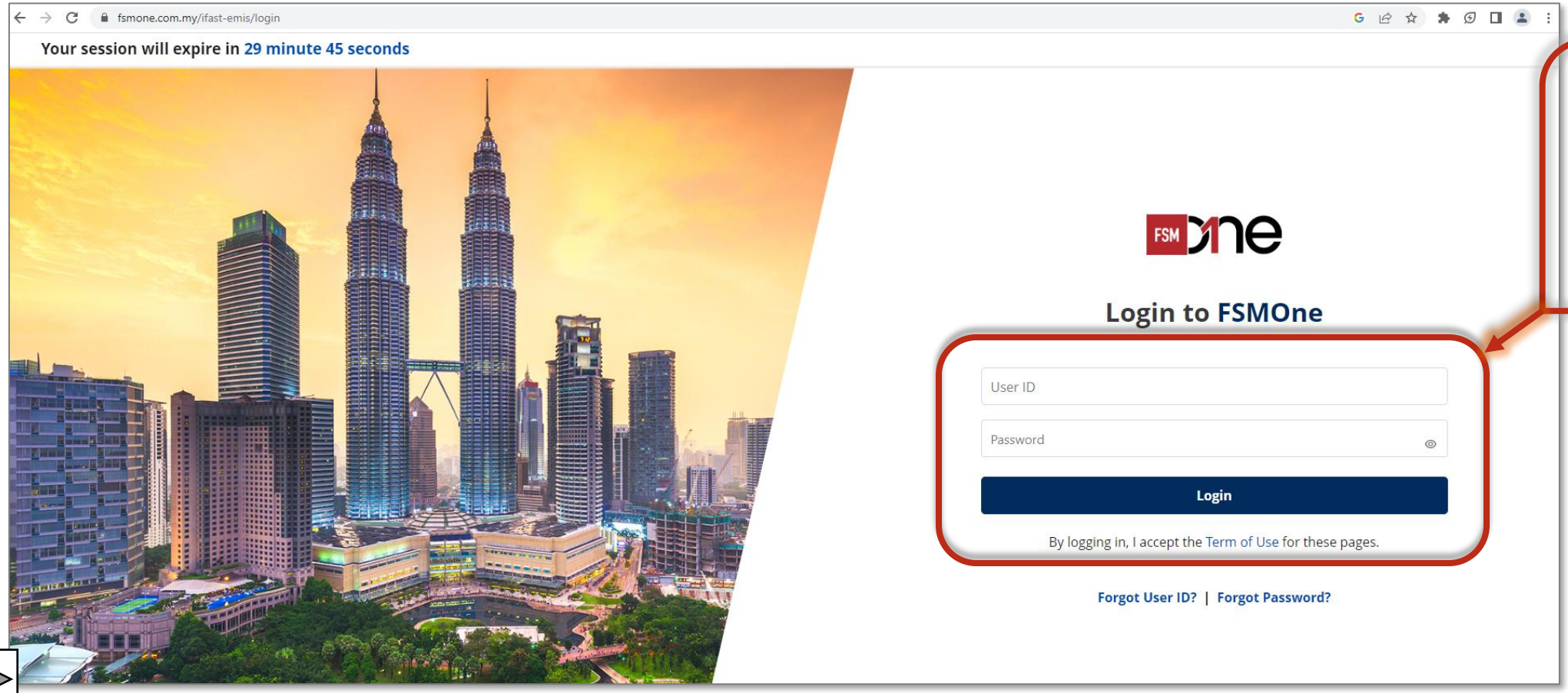
- Read and Agree to the T&C, then proceed to click [OK].



Switching via EPF i-Invest Website

➲ Step 6

- It will re-direct you to FSMOne page. Log in your investment account.



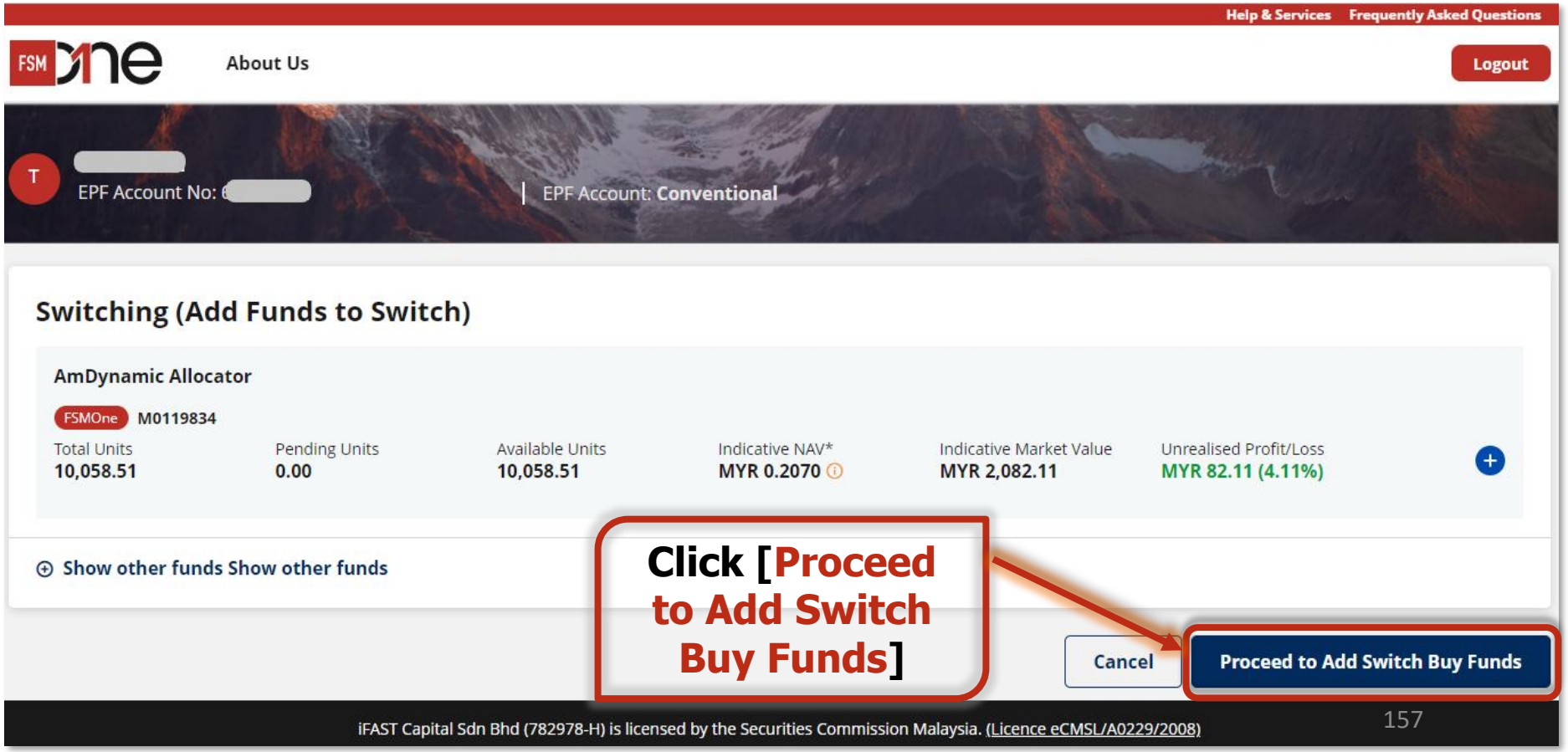
Switching via EPF i-Invest Website

➲ Step 7a

- Check your switch transaction is displayed correctly before clicking [Proceed to Add Switch Buy Funds].

Generally, the fund house would require T+3 business days to process and complete the transaction.

Once the transaction cycle is completed, your units will appear in your holdings.



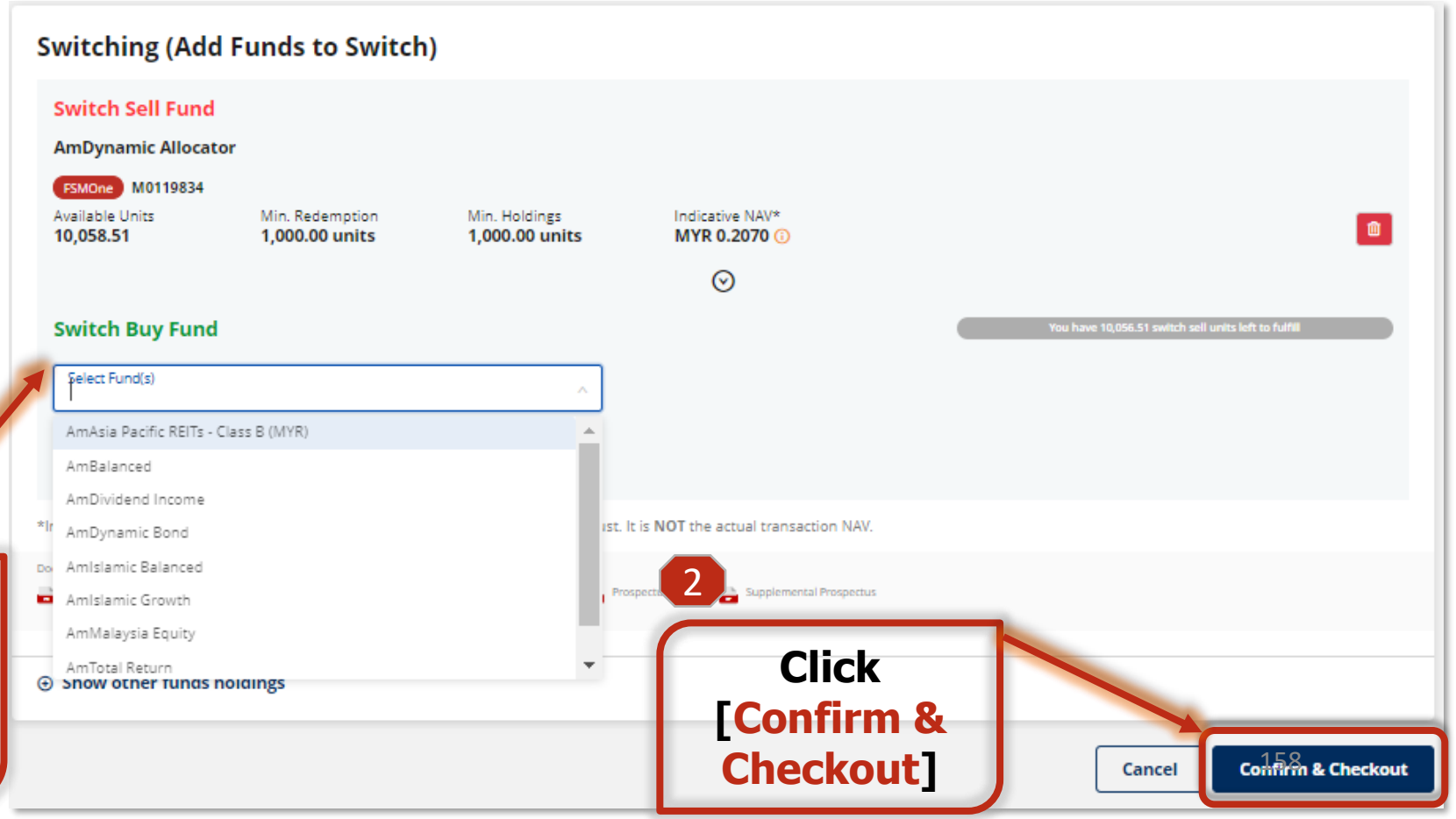
Switching via EPF i-Invest Website

➲ Step 7b

- Check your switch buy transaction is displayed correctly before clicking [Proceed to Add Switch Buy Funds].

Generally, the fund house would require T+3 business days to process and complete the switching transaction.

Once the transaction cycle is completed, your units will appear in your holdings.



1 **Select the preferred Switch Buy Fund**

2 **Click [Confirm & Checkout]**

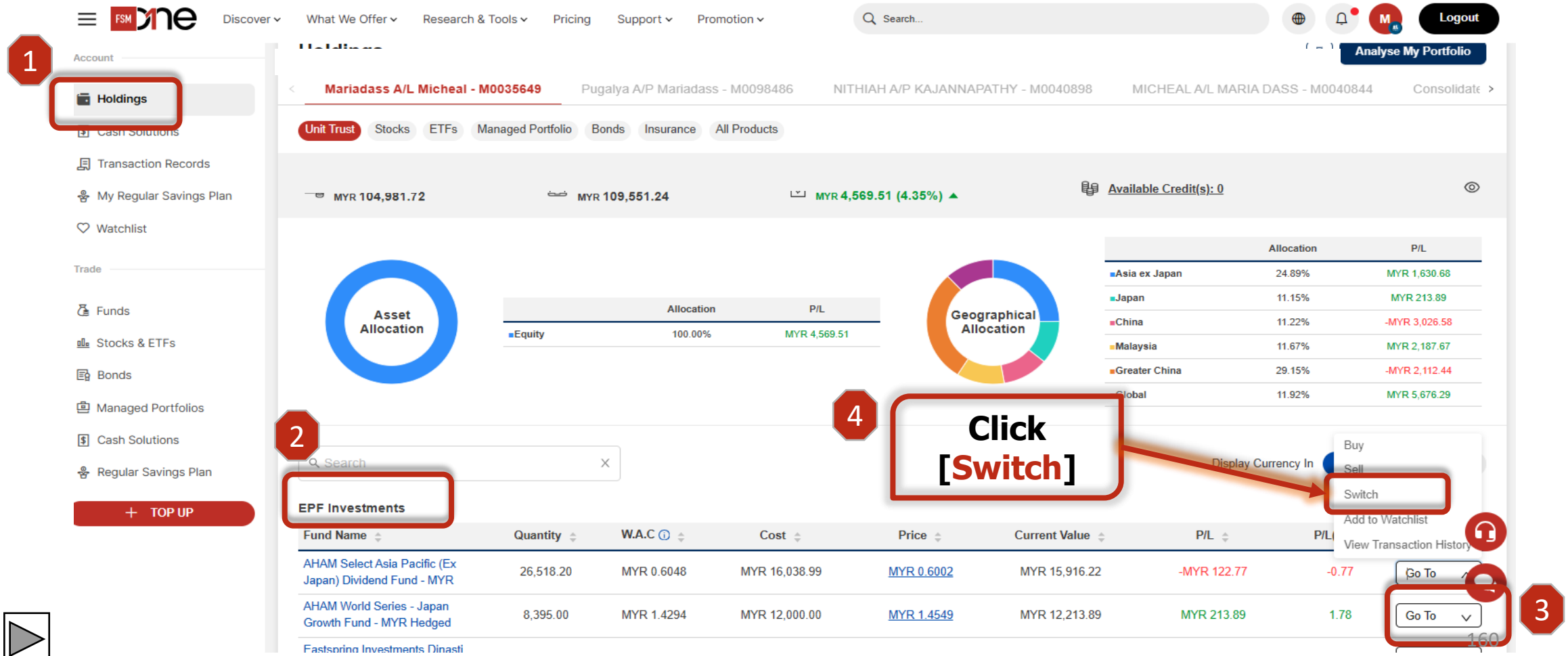
FSMOne step by step guide

Switching EPF-Approved Unit Trust Fund through FSMOne platform

Switching via FSMOne Platform

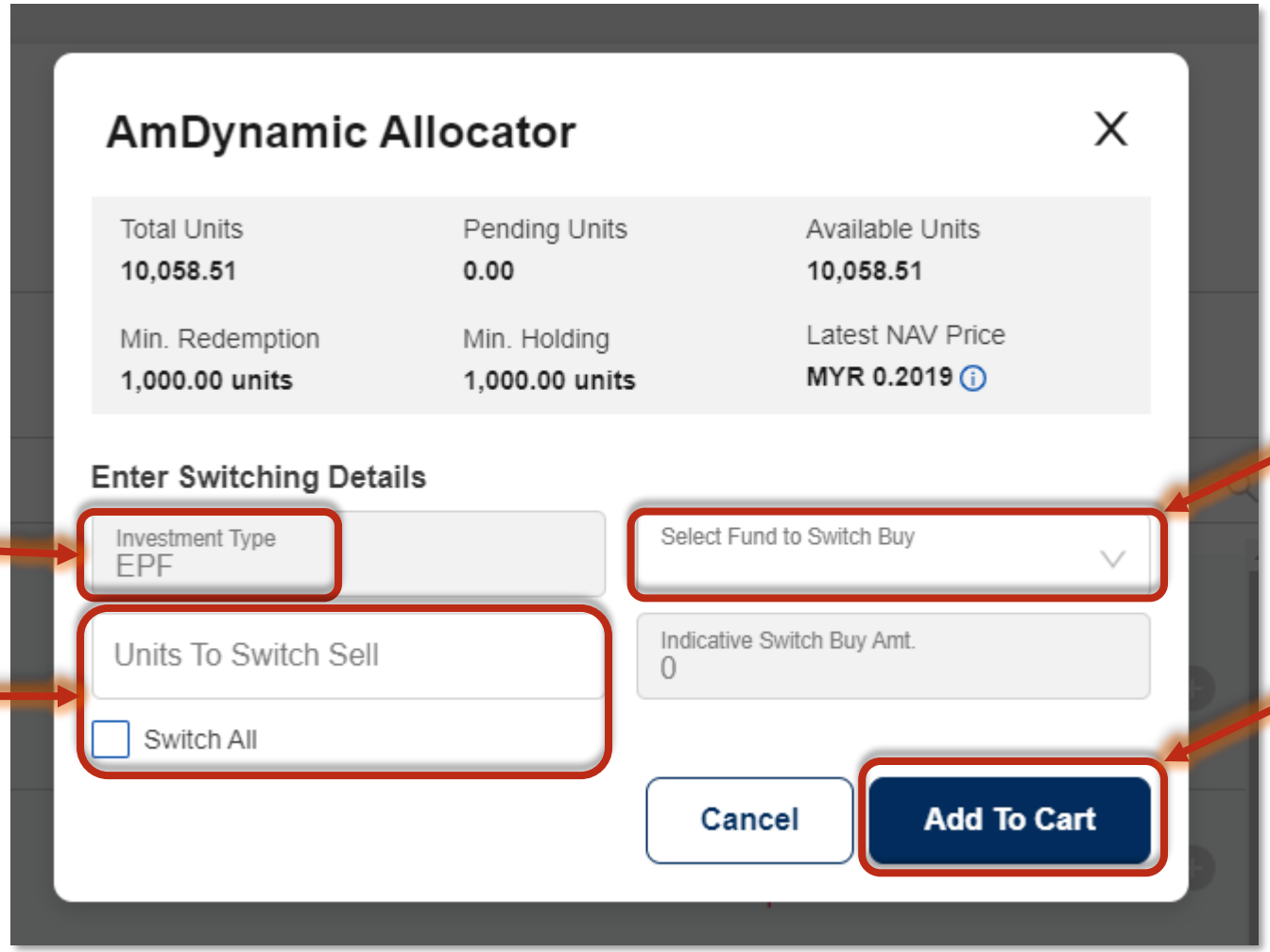
Step 1

- Log in to your FSMOne account, go to Holding> EPF Investments> Actions> Go to> Click [Switch].



Switching via FSMOne Platform

➲ Step 2



1 **Make sure the Redemption Type is [EPF]**

2 **Indicate 'Units To Switch Sell' or 'Switch All'**

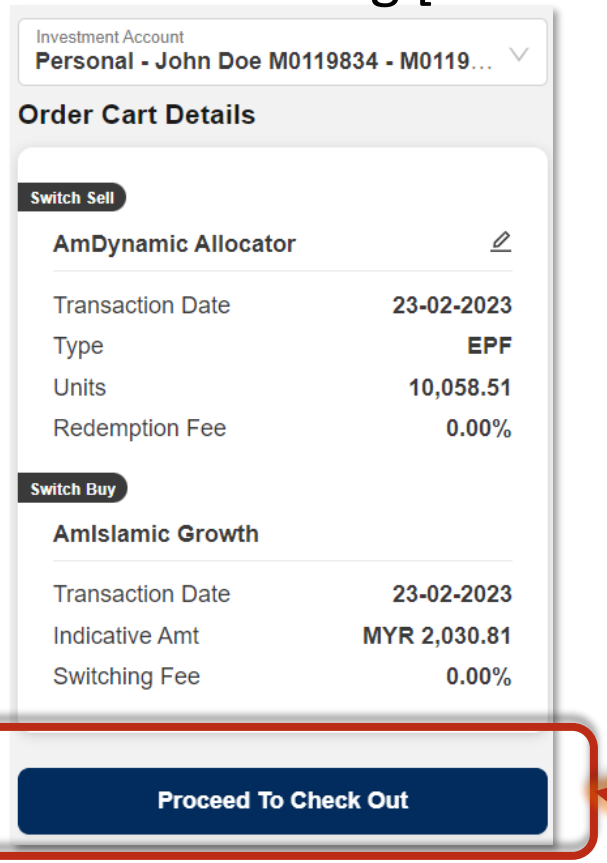
3 **Select Fund to Switch Buy**

4 **Click [Add to Cart]**

Switching via FSMOne Platform

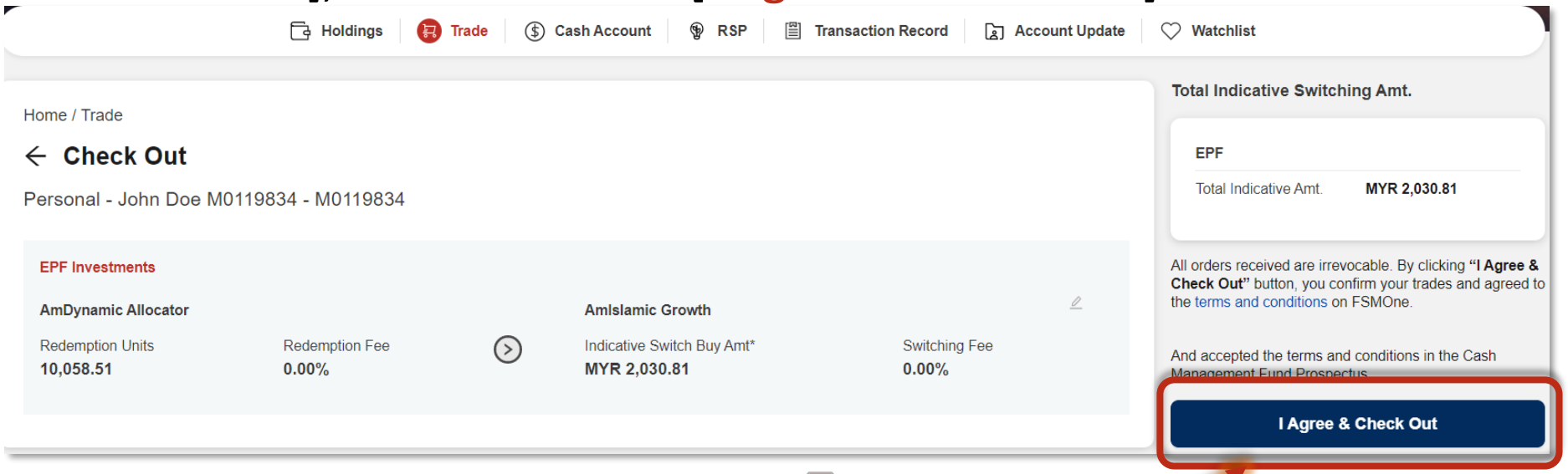
➲ Step 3

- Check your Switch Sell and Switch Buy transaction is displayed correctly before clicking [Proceed to Check Out], thereafter click [I Agree & Check Out].



1

Click [Proceed to Check Out]



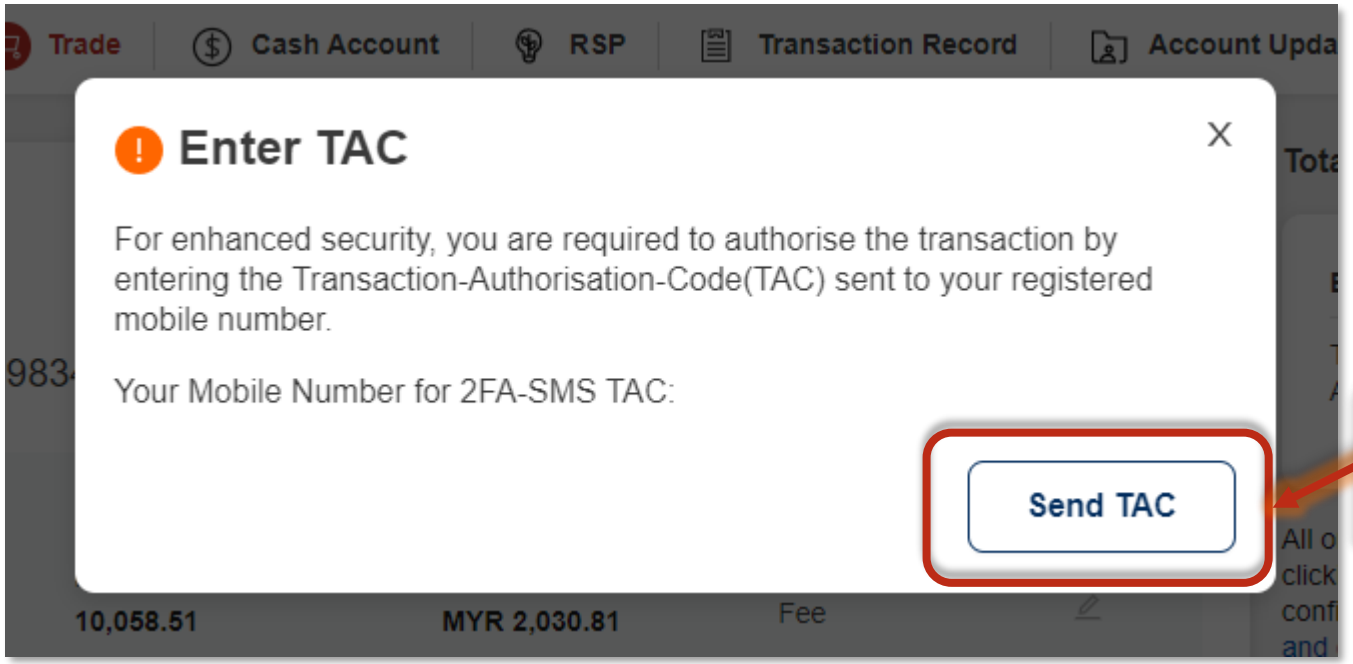
2

Click [I Agree & Check Out]

Switching via FSMOne Platform

➲ Step 4

- Enter the TAC after clicking [Send Tac] to proceed with Switching the fund.



Click [Send TAC]

Generally, the fund house would require T+3 business days to process and complete the switching transaction.

Once the transaction cycle is completed, your units will appear in your holdings.

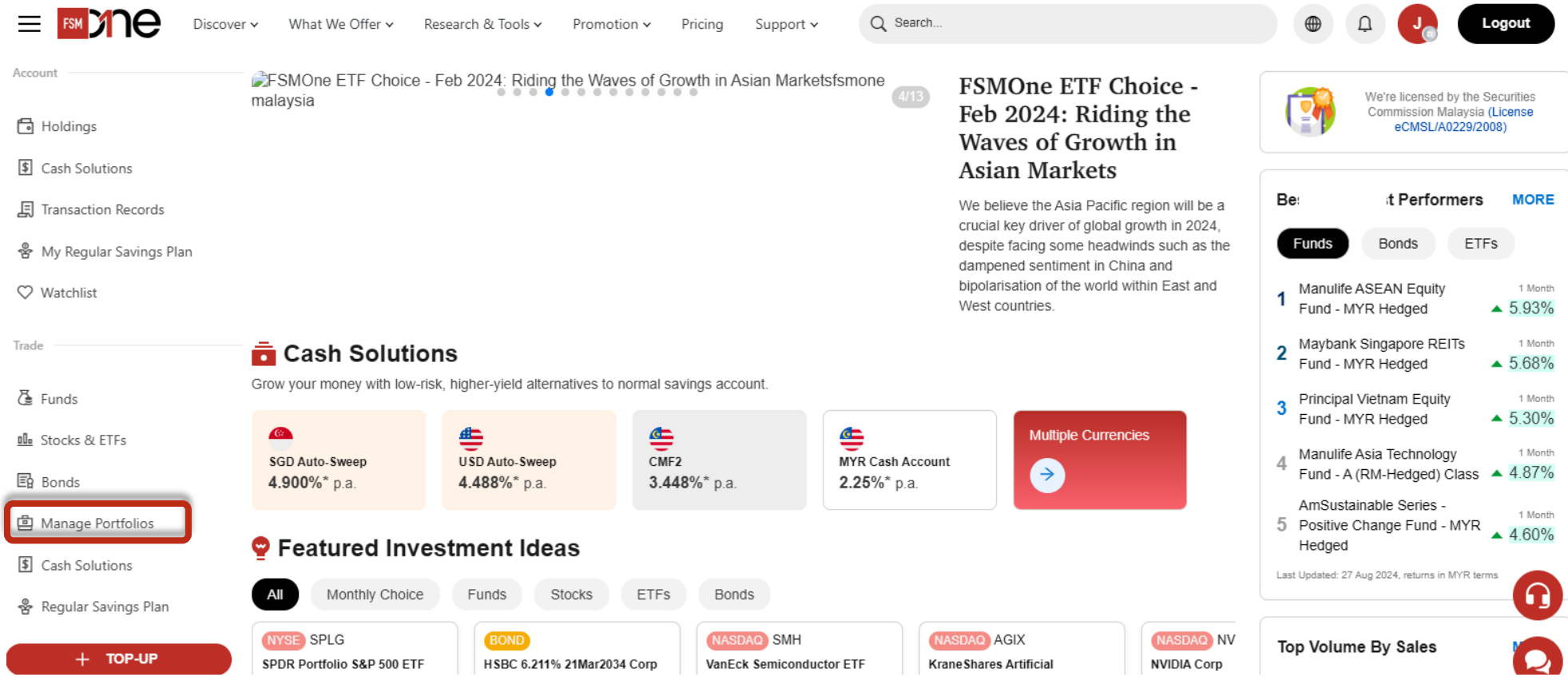
FSMOne step by step guide

Buy Managed Portfolios

Buying Managed Portfolios on FSMOne

Step 1

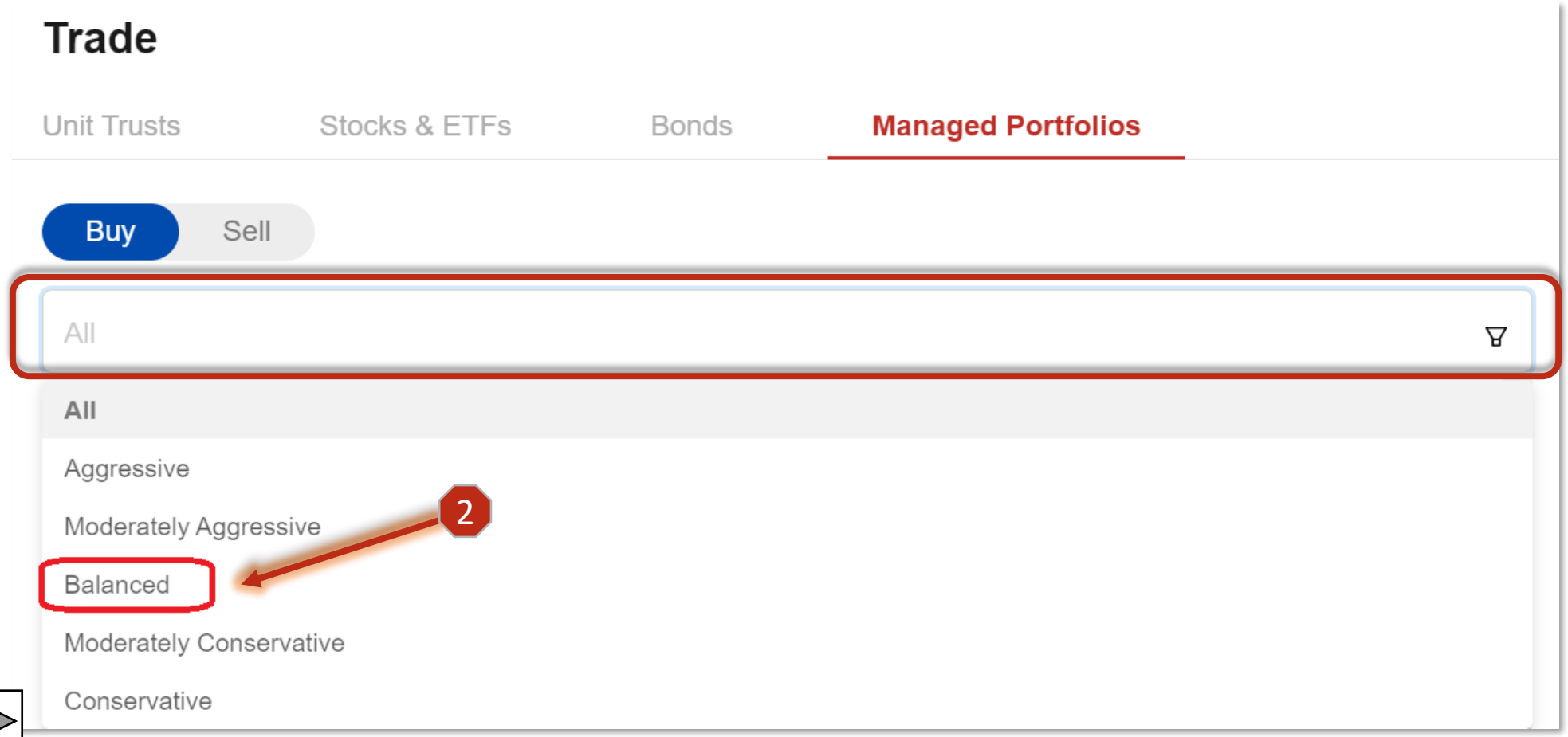
- Click on [Managed Portfolios]



Buying Managed Portfolios on FSMOne

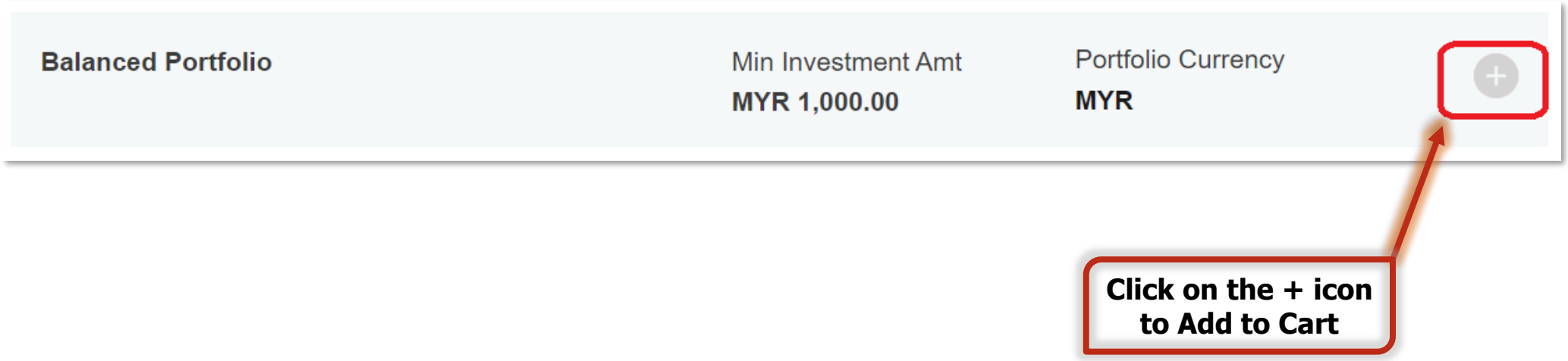
➲ Step 2

- Select a portfolio from the drop down list, for example - Balanced



Buying Managed Portfolios on FSMOne

- **Step 3**



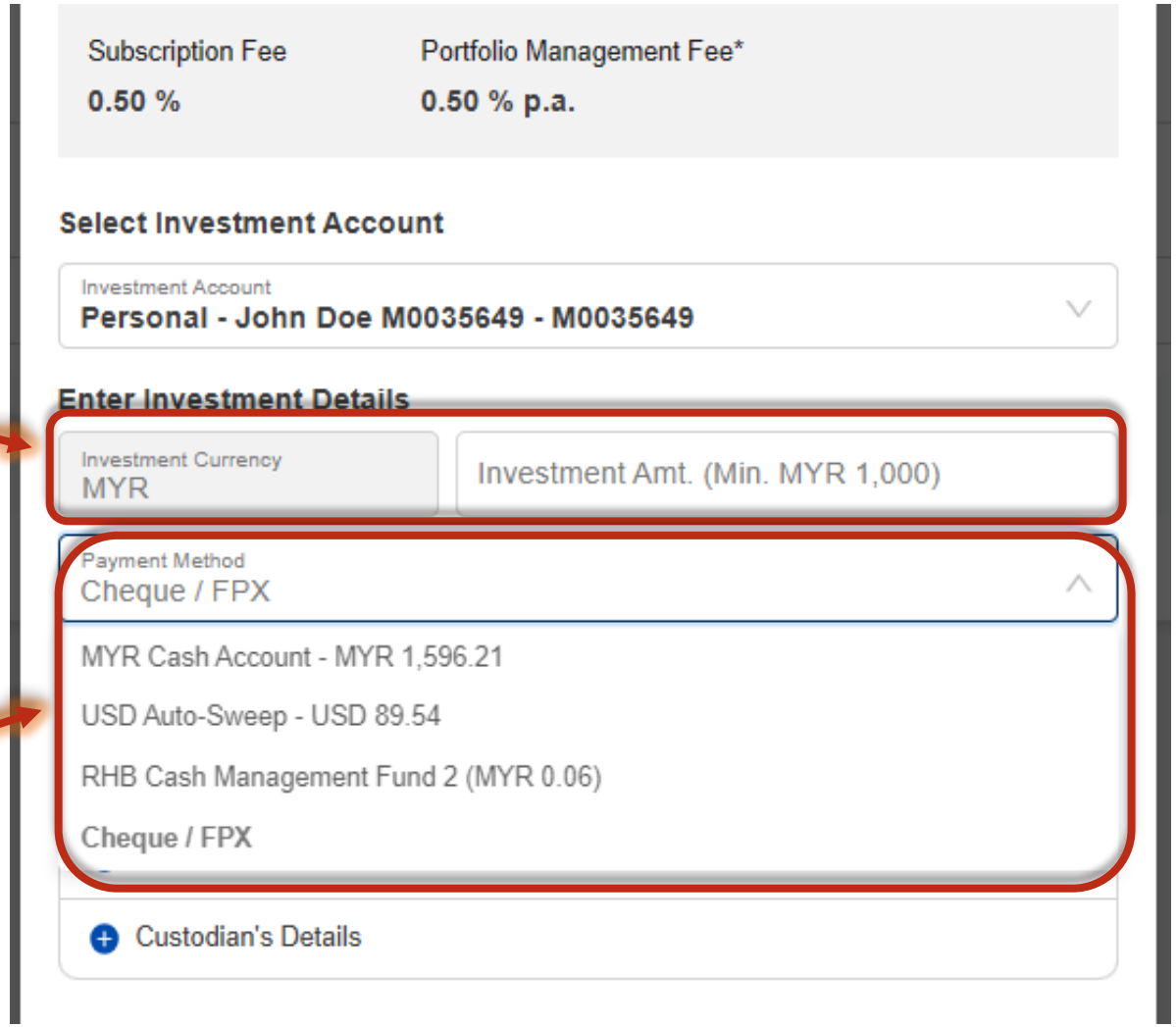
Buying Managed Portfolios on FSMOne

➲ Step 4

Enter Investment Amount

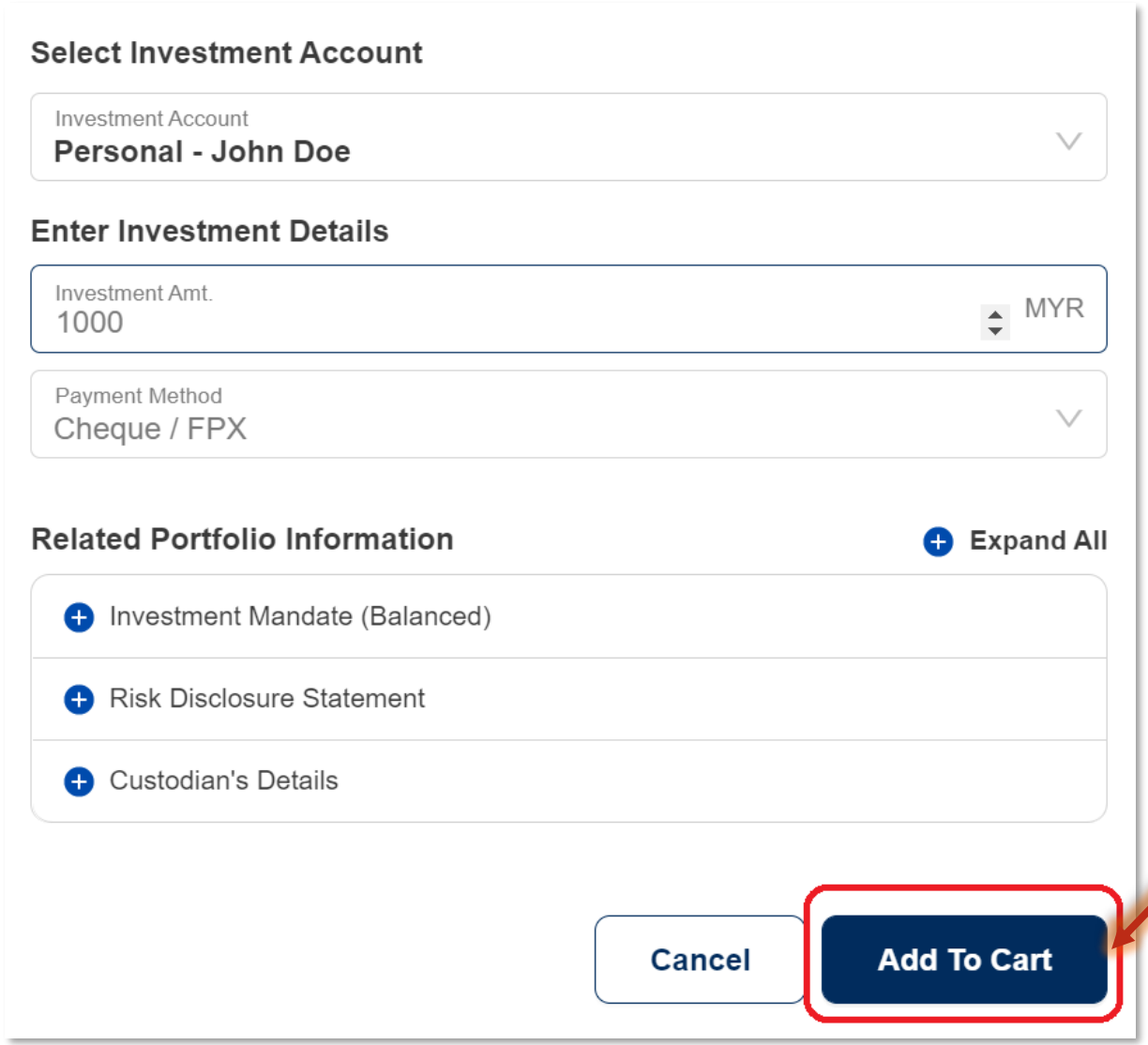
Select a payment method

- **USD Auto Sweep**
- **RHB CMF2**
- **Cash Account**
- **Cheque/FPX**



Buying Managed Portfolios on FSMOne

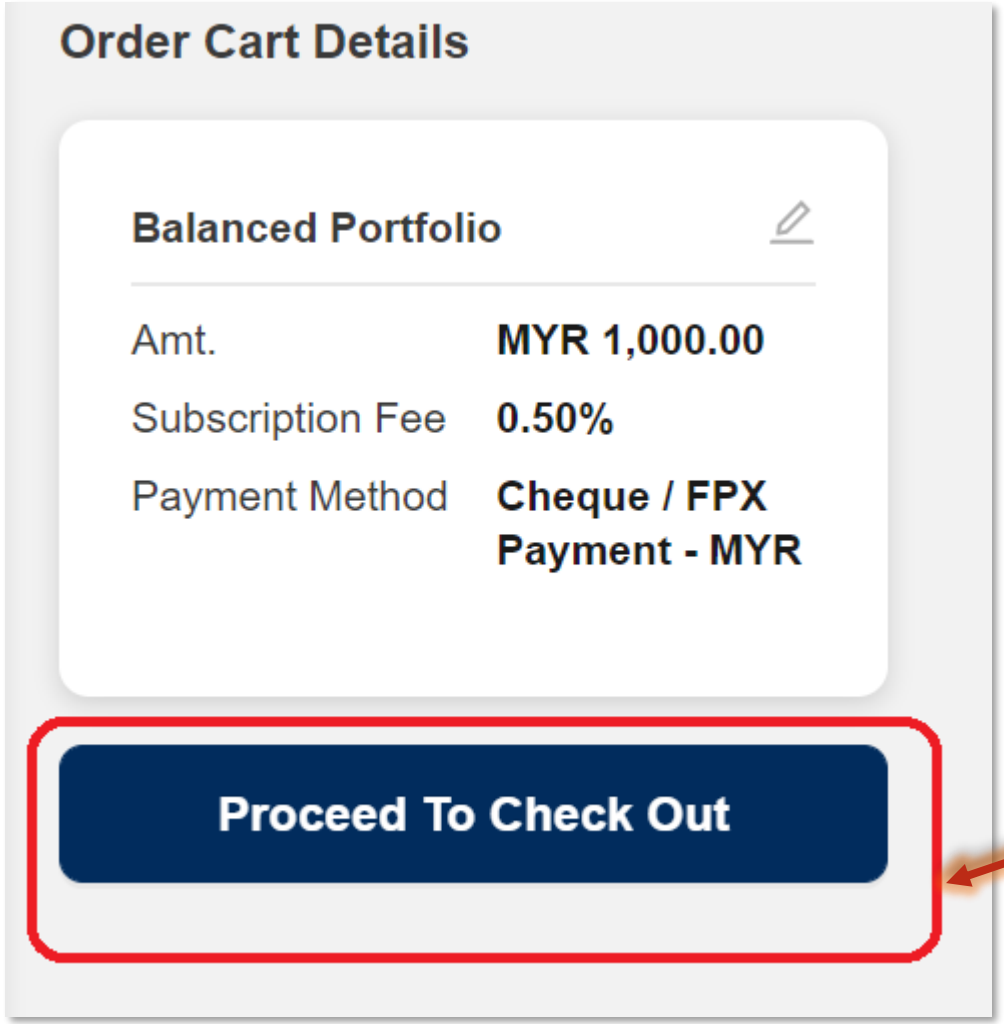
Step 5



Click [Add to Cart]

Buying Managed Portfolios on FSMOne

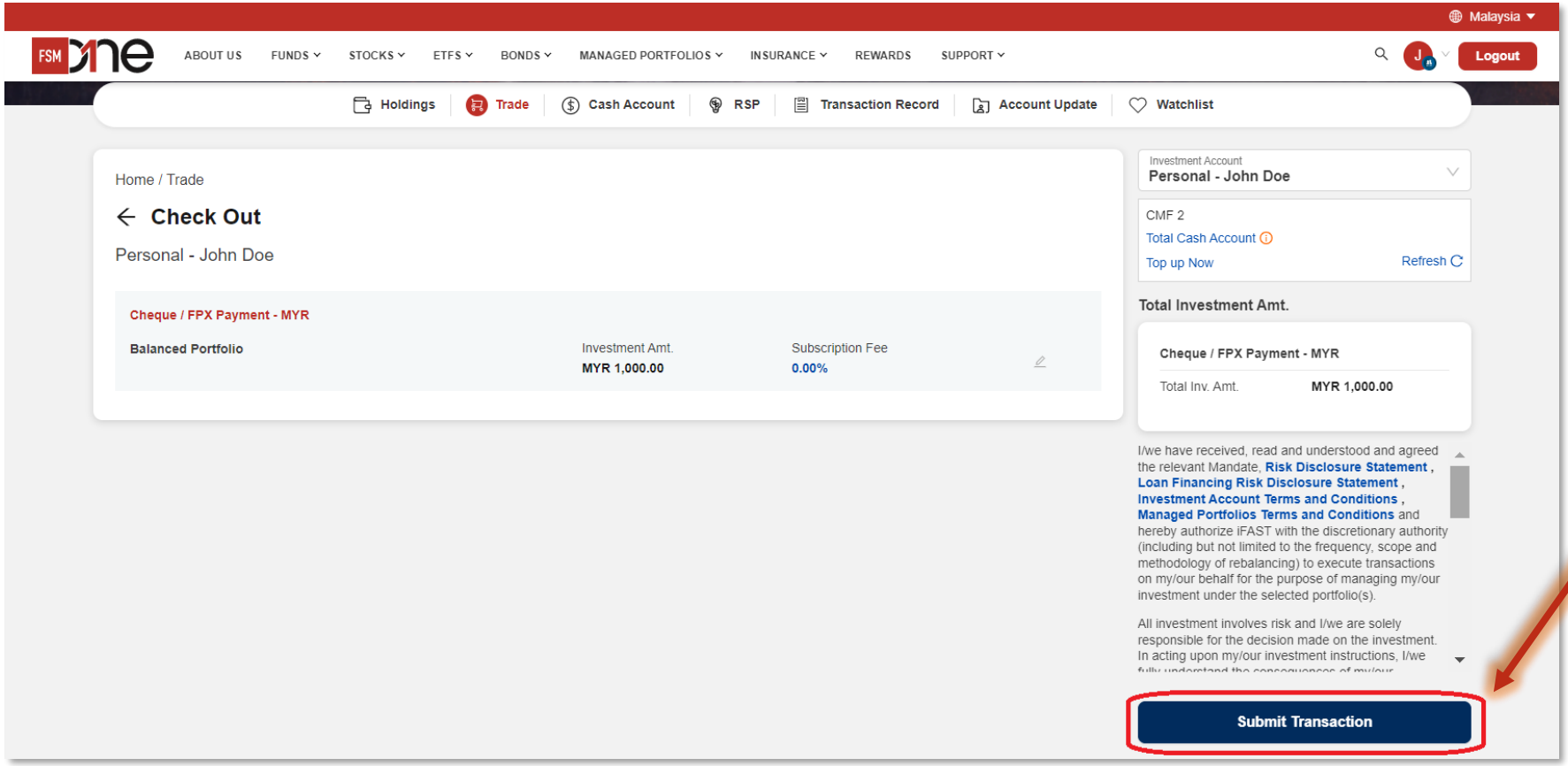
➲ **Step 6**



Click [Proceed To Check Out]

Buying Managed Portfolios on FSMOne

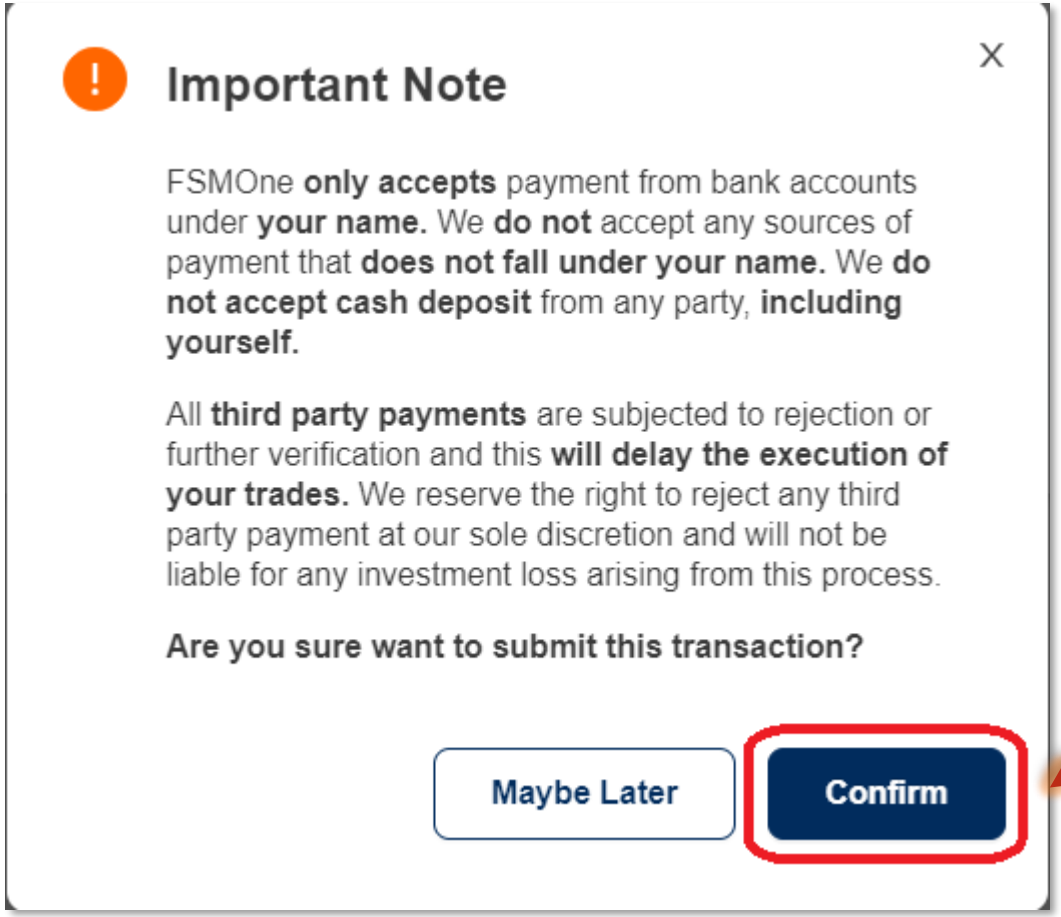
Step 7



Click [Submit Transaction]

Buying Managed Portfolios on FSMOne

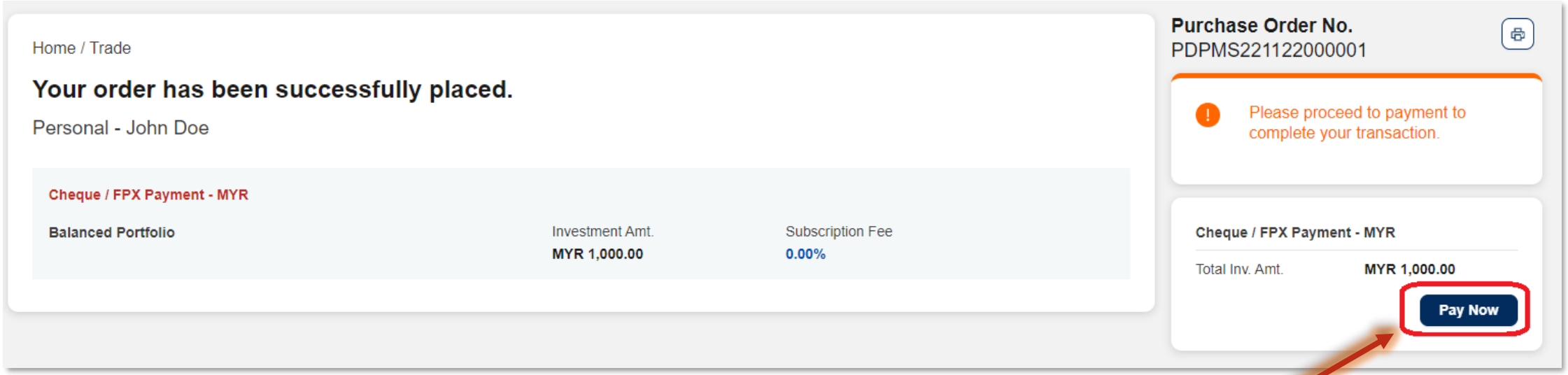
- **Step 8**



Click [Confirm]

Buying Managed Portfolios on FSMOne

Step 9

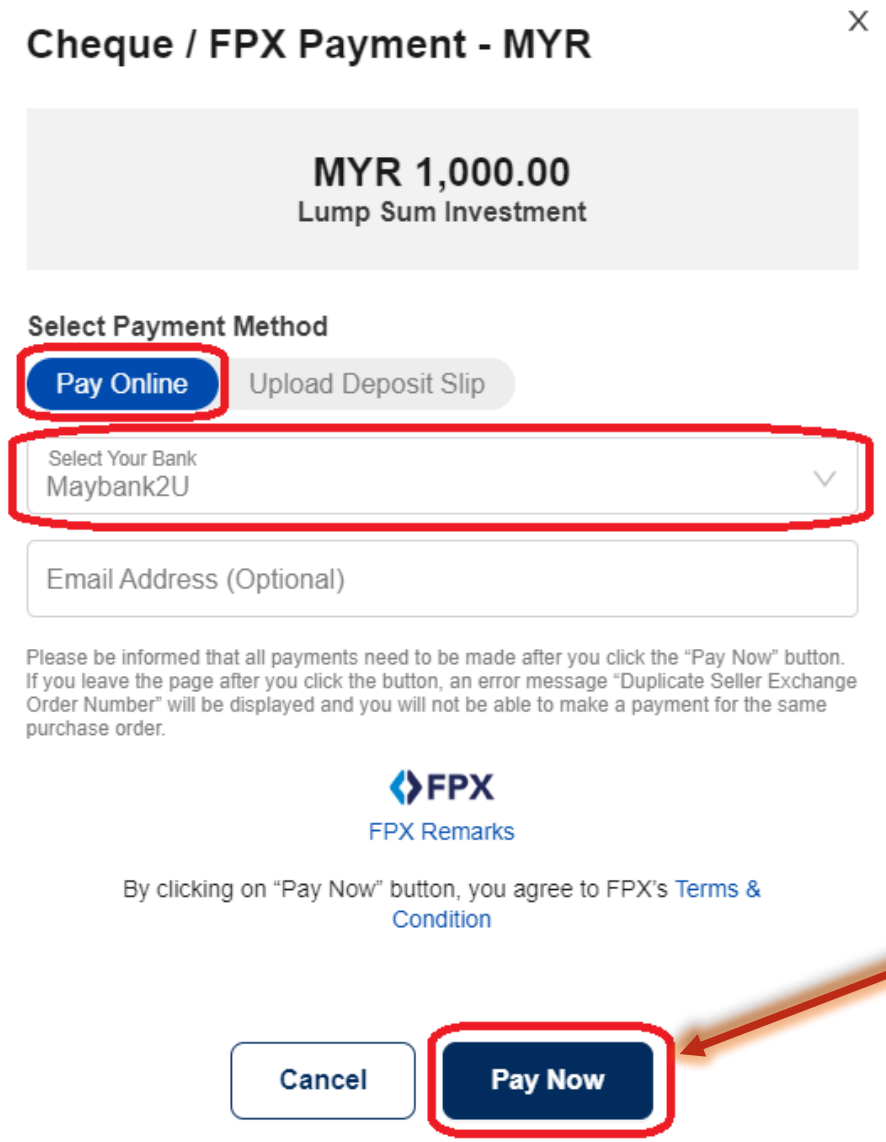


Click [Pay Now] to proceed to the payment page

Buying Managed Portfolios on FSMOne

Step 10

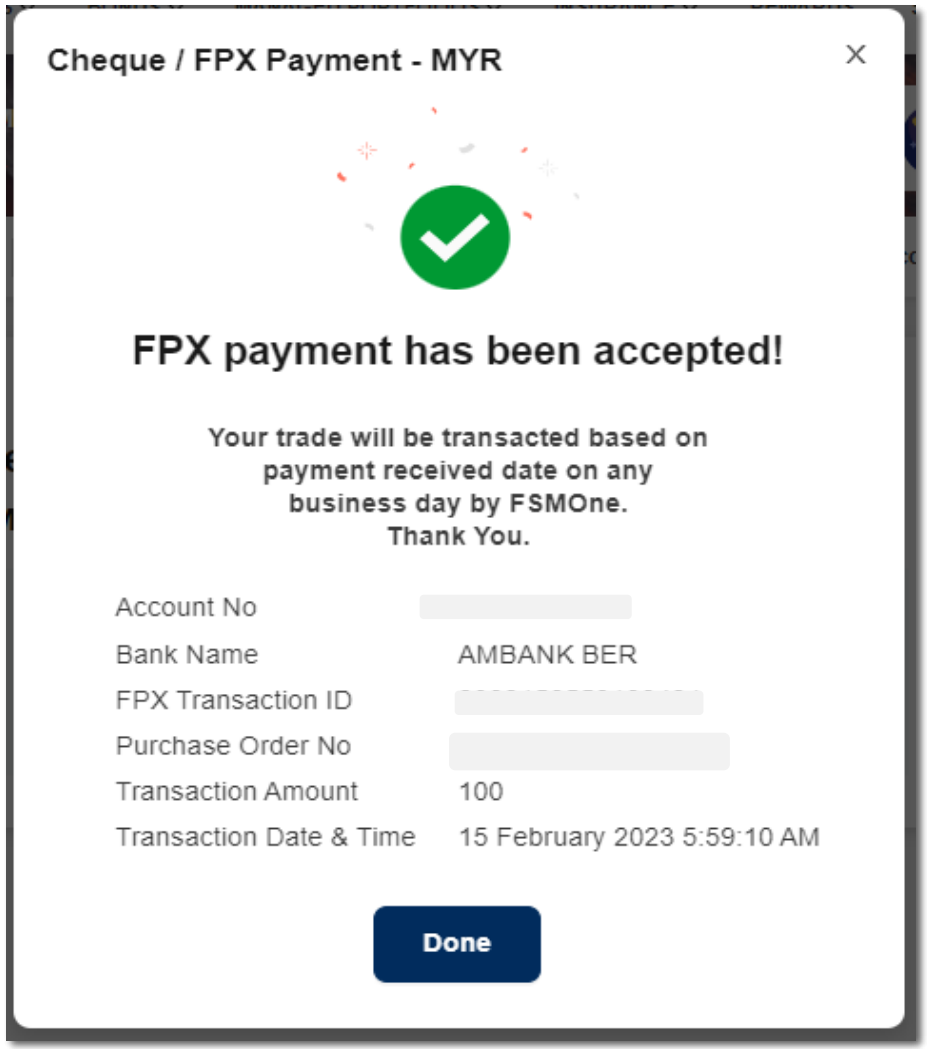
1 **Select your bank**



2 **Click [Pay Now] to make payment**

Buying Managed Portfolios on FSMOne

- Done



FSMOne step by step guide

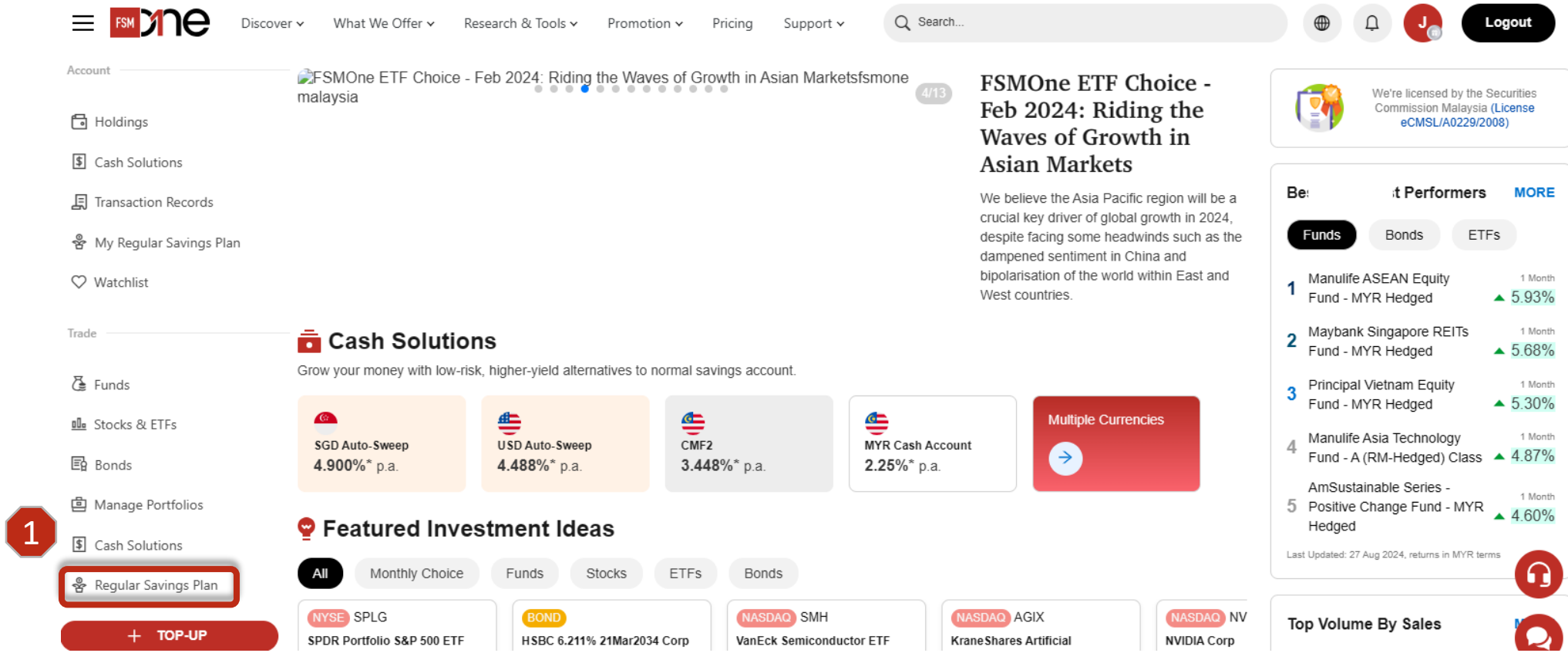
Managed Portfolios

Regular Savings Plan (RSP)

RSP for Managed Portfolio on FSMOne

Step 1

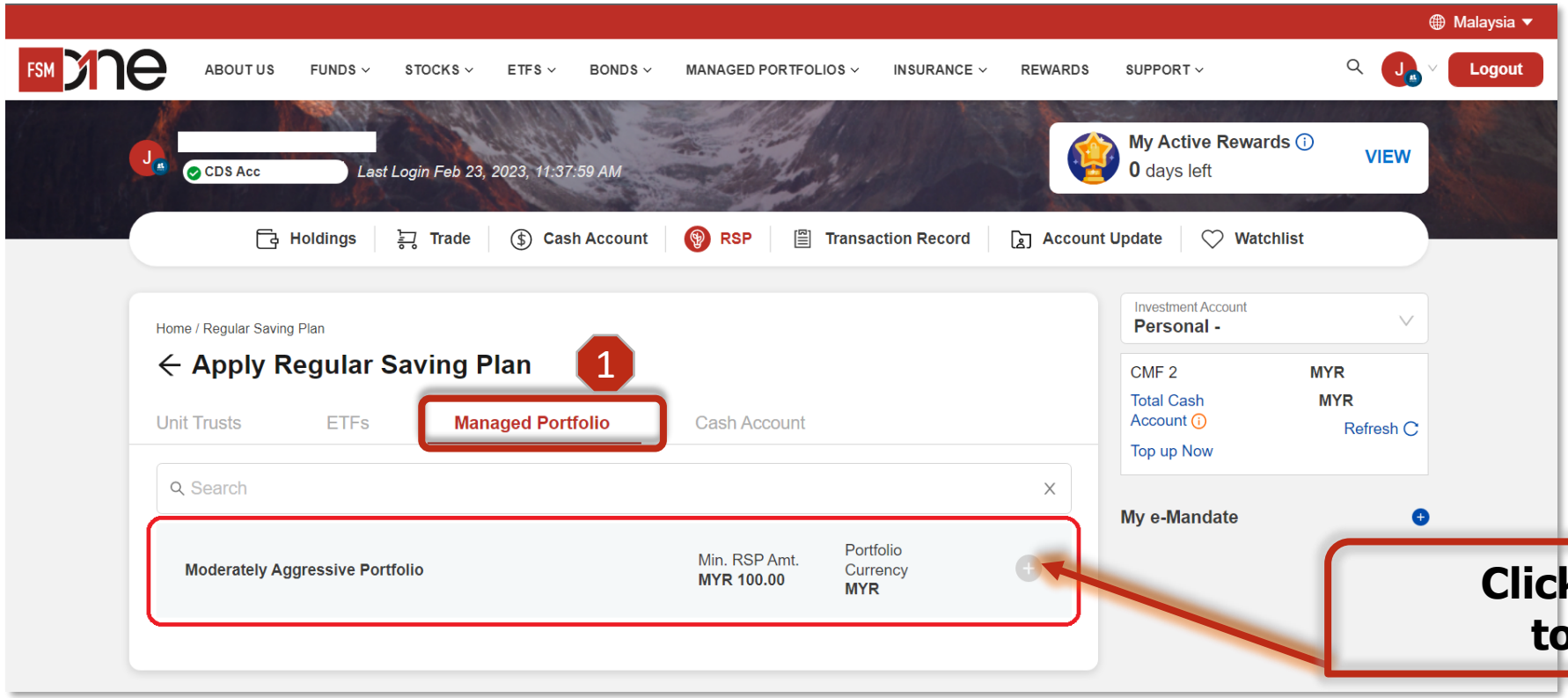
- **Click on [Regular Savings Plan]**



RSP for Managed Portfolios on FSMOne

Step 2

Click on [Managed Portfolio]

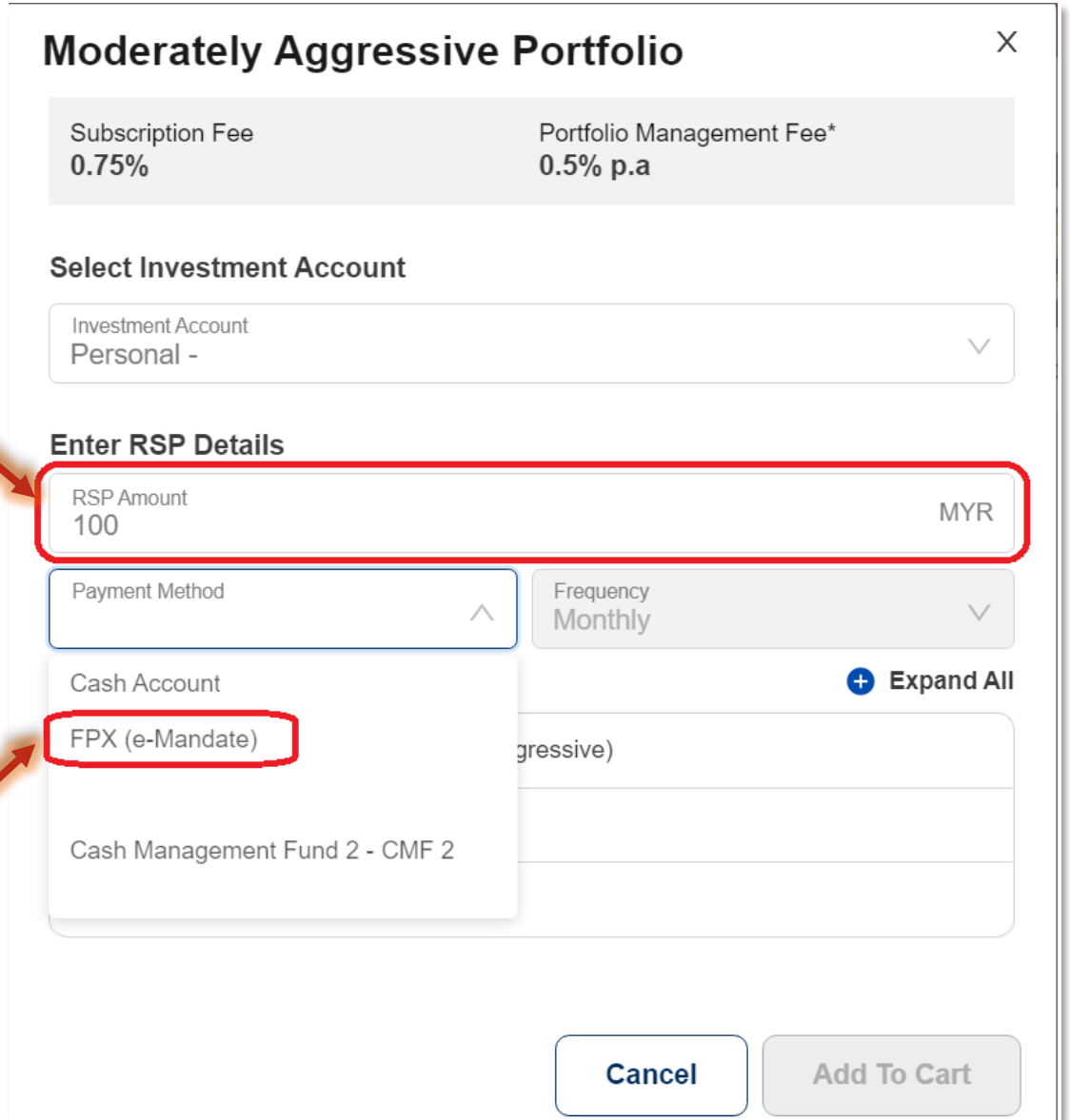


RSP for Managed Portfolios on FSMOne

➲ Step 3

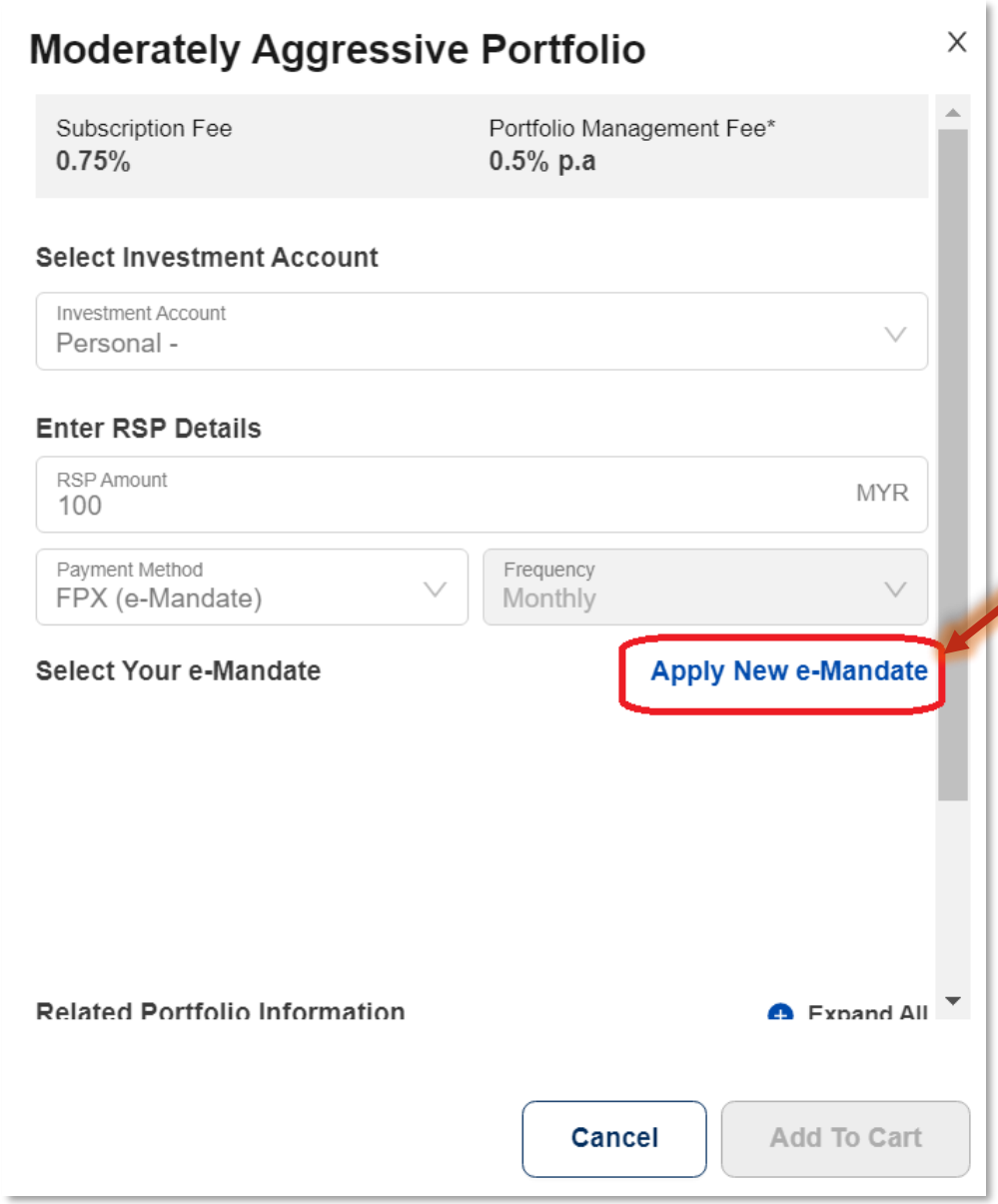
Input desired RSP Amount

Select a payment method
- **Cash Account**
- **FPX (e-Mandate)**
- **Cash Management Fund 2**



RSP for Managed Portfolios on FSMOne

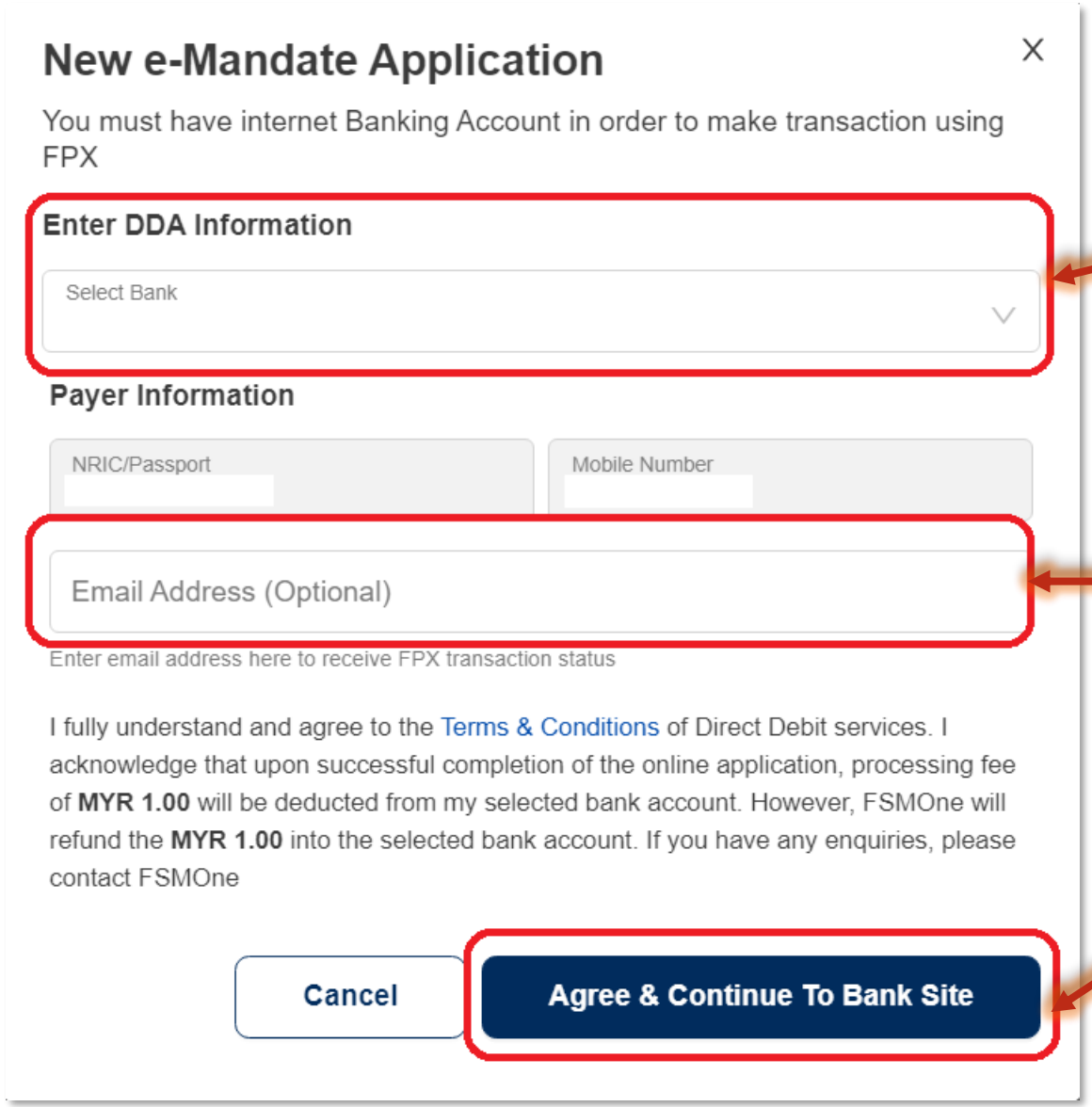
➲ Step 4



Click on [Apply New e-Mandate] if this is your first time applying for an RSP. Otherwise, you may skip this step.

RSP for Managed Portfolios on FSMOne

Step 5



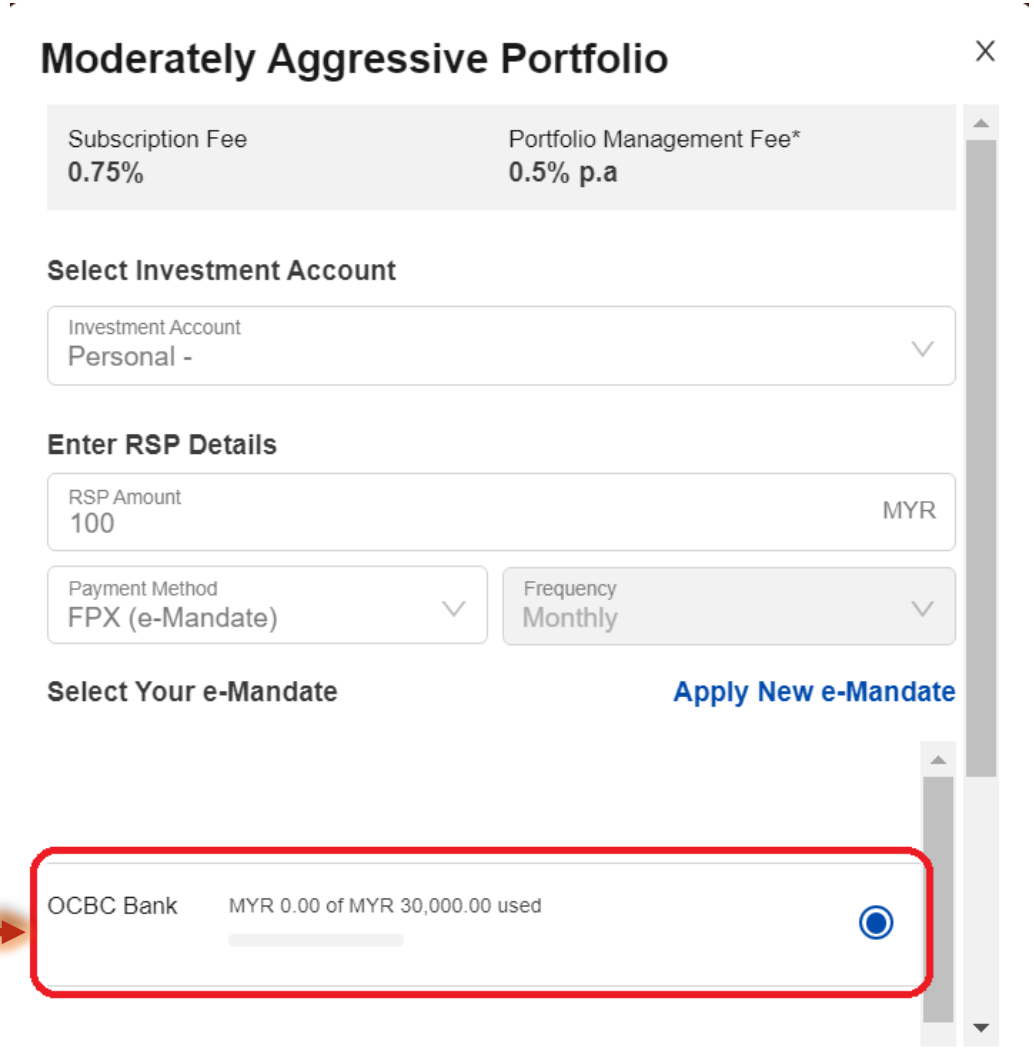
Select your bank from the drop down list.

You may also enter your Email Address here.

Click on [Agree & Continue to Bank Site] and you will be required to login at your usual Online Banking website at the following page

RSP for Managed Portfolios on FSMOne

Step 6

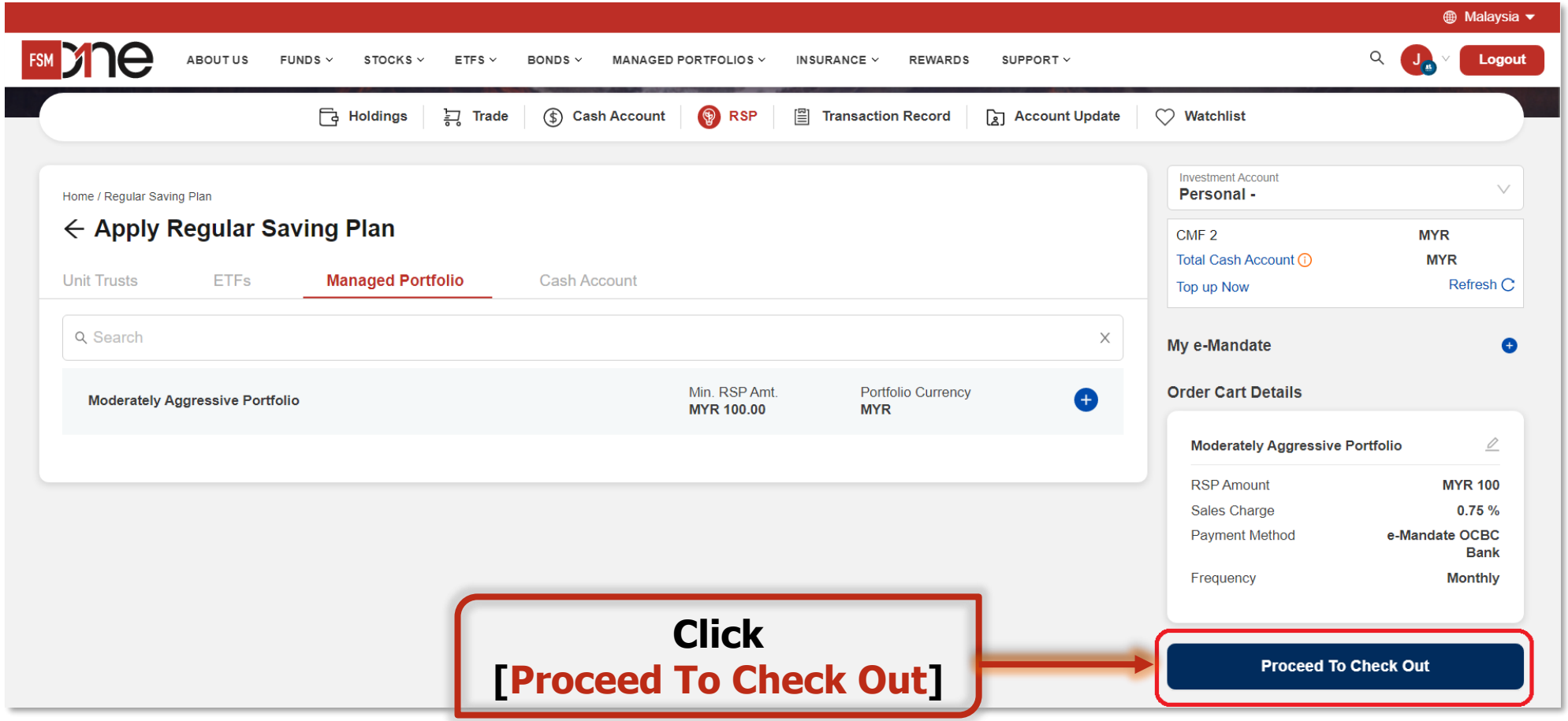


Select your preferred bank

Click [Add to Cart]

RSP for Managed Portfolios on FSMOne

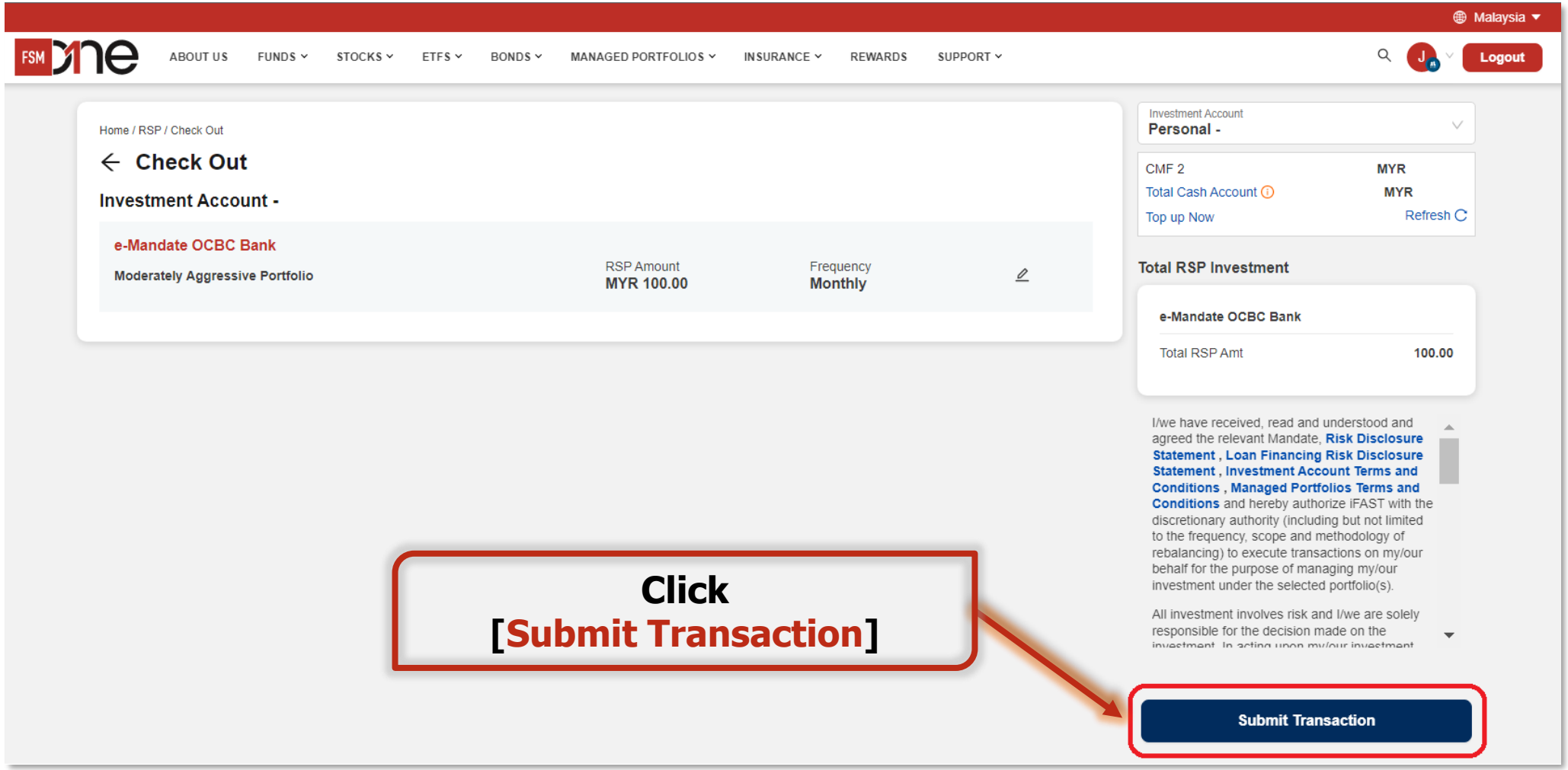
Step 7



Click
[Proceed To Check Out]

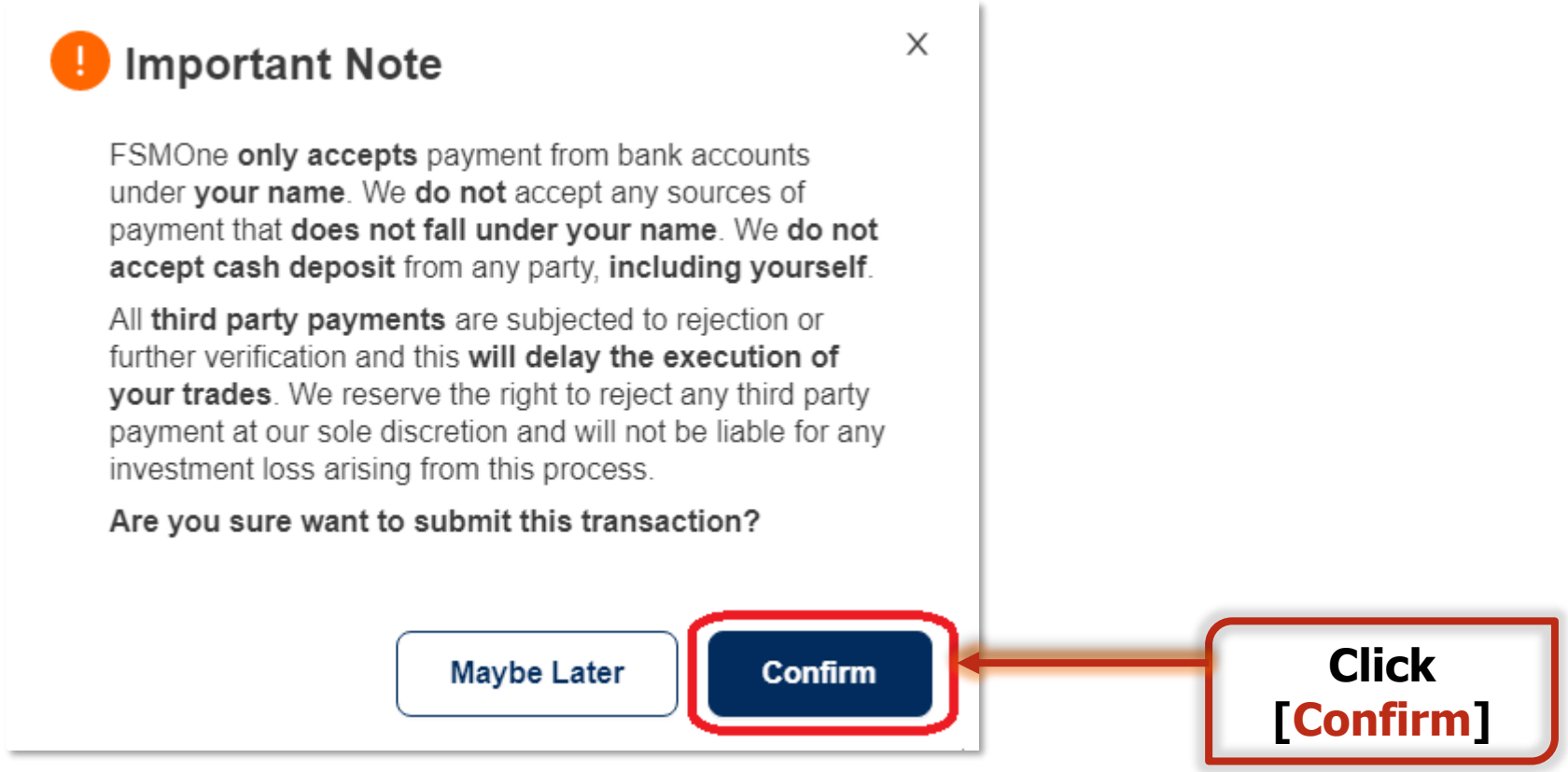
RSP for Managed Portfolios on FSMOne

Step 8



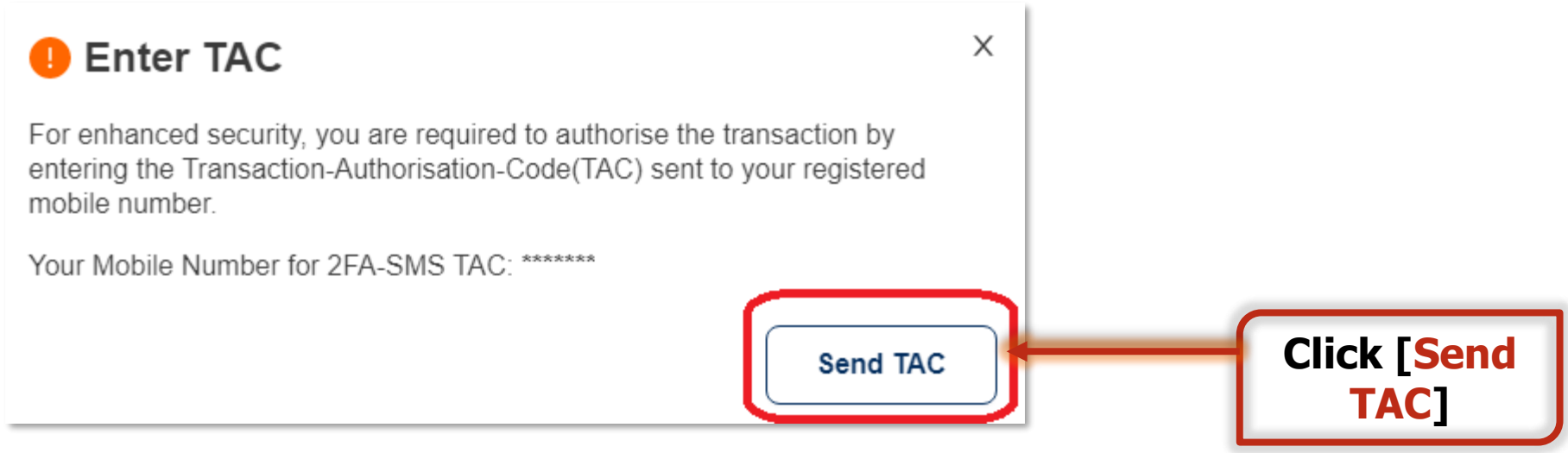
RSP for Managed Portfolios on FSMOne

- **Step 9**



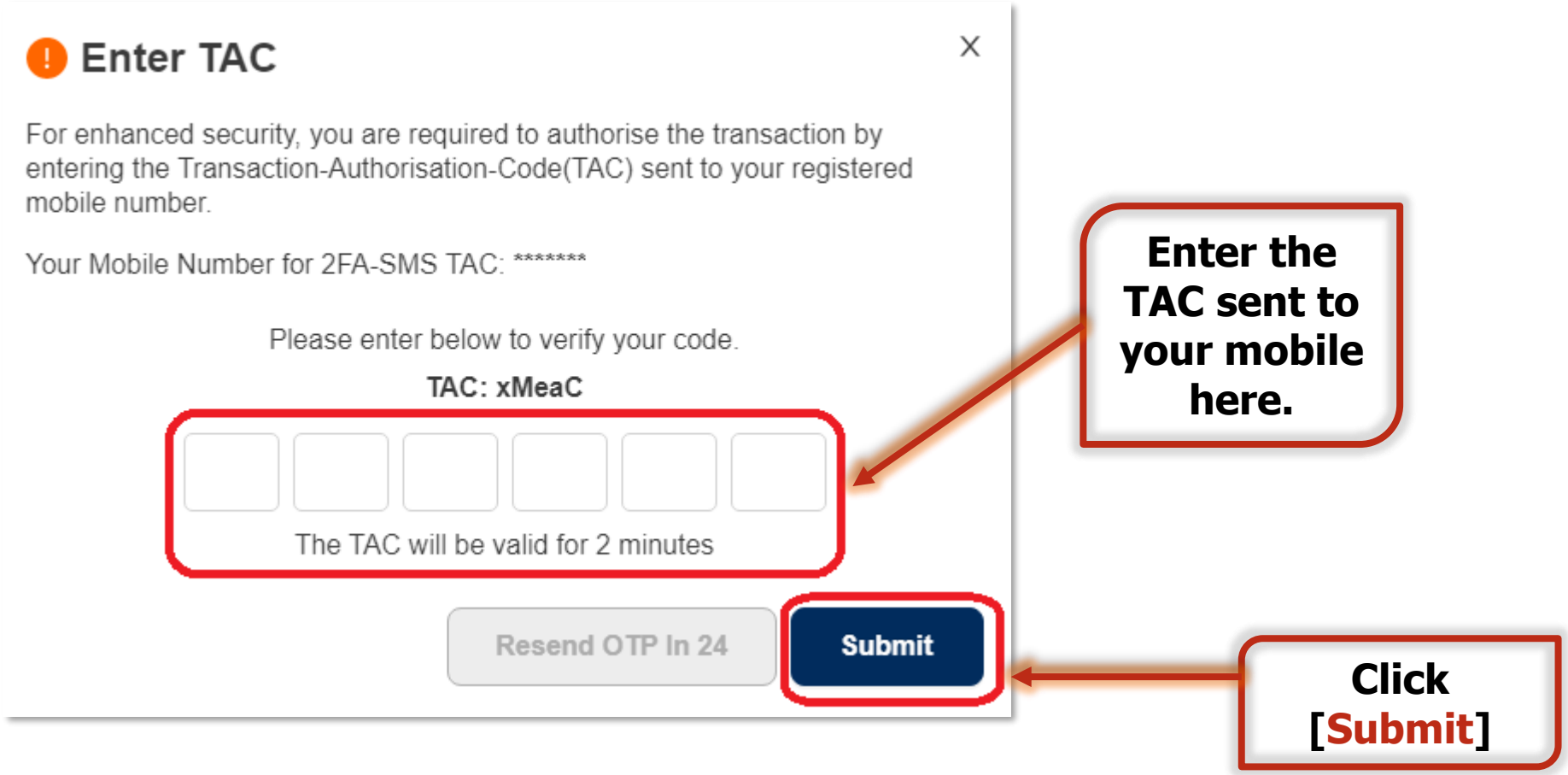
RSP for Managed Portfolios on FSMOne

- **Step 10**



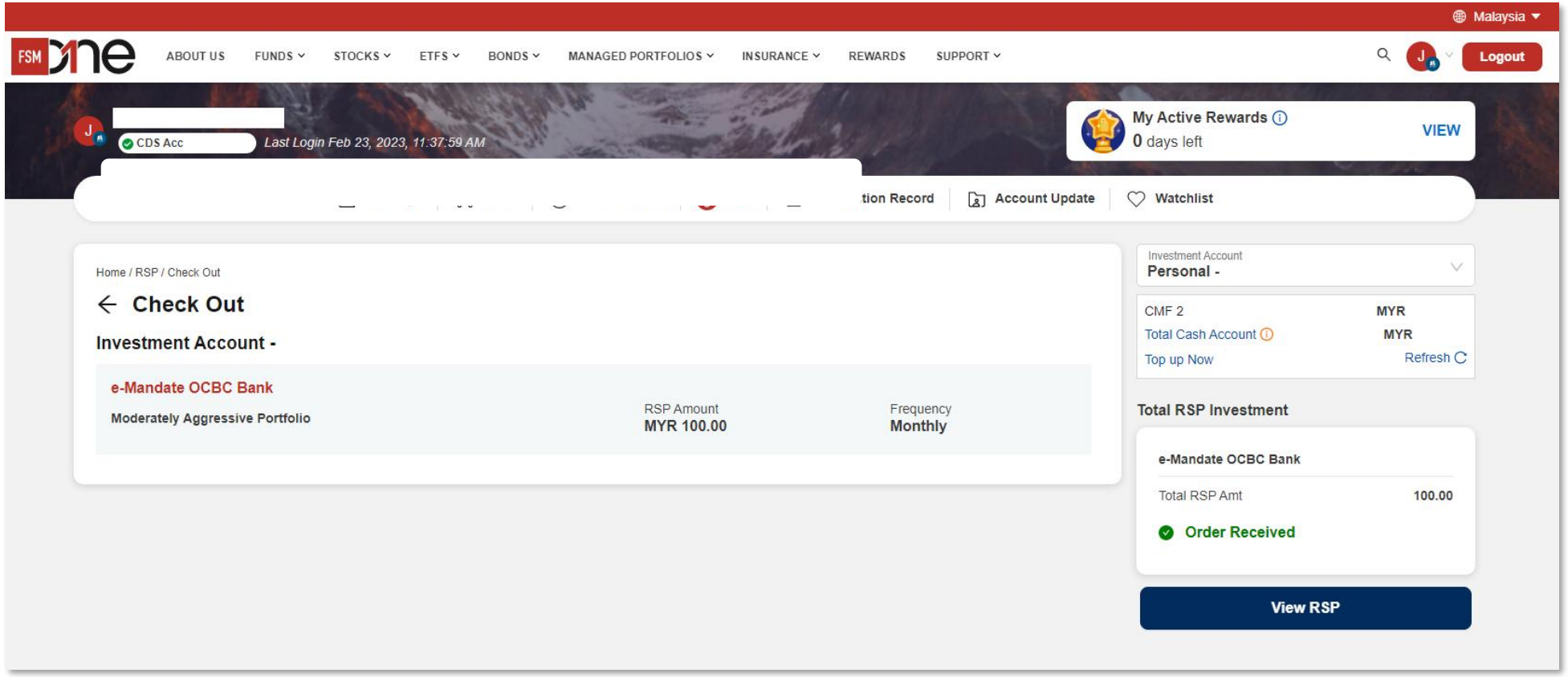
RSP for Managed Portfolios on FSMOne

Step 11



RSP for Managed Portfolios on FSMOne

- Done



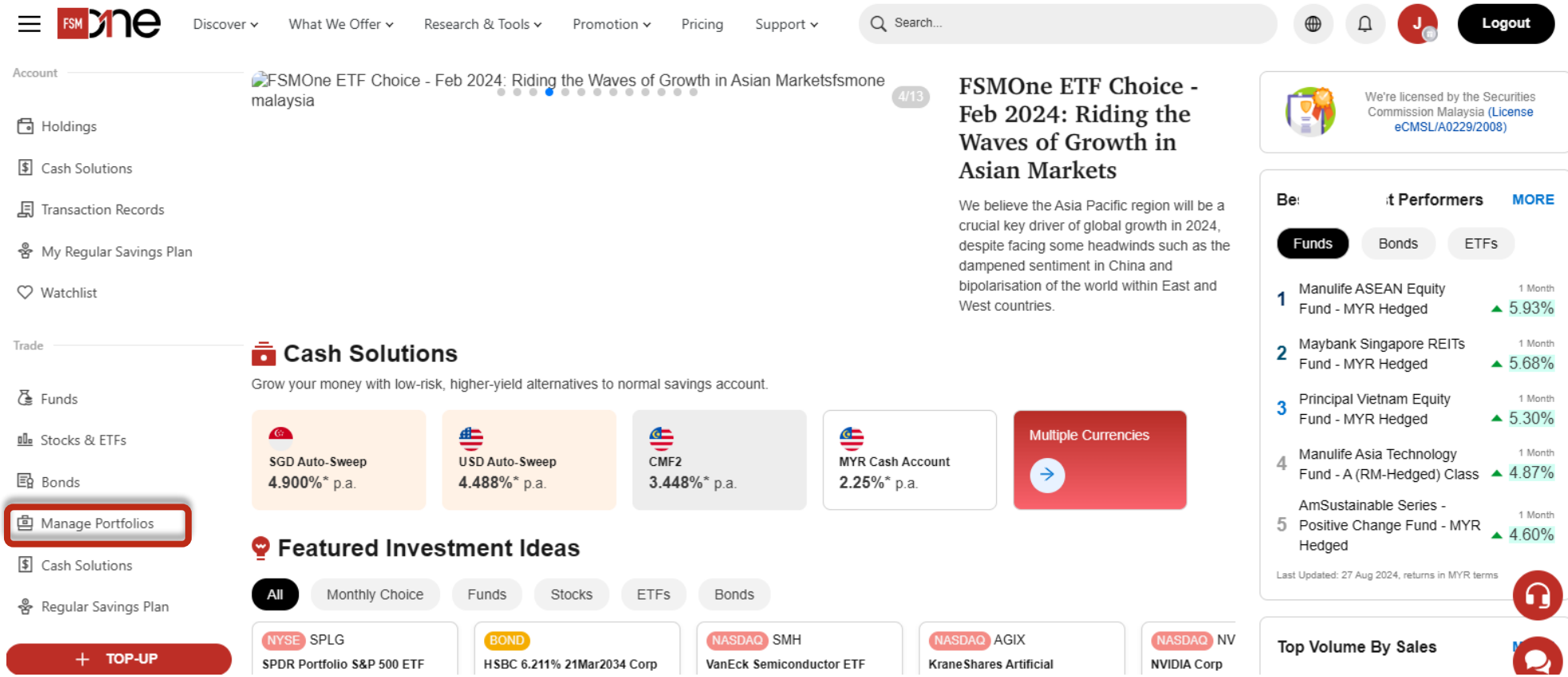
FSMOne step by step guide

Sell Managed Portfolios

Selling Managed Portfolios on FSMOne

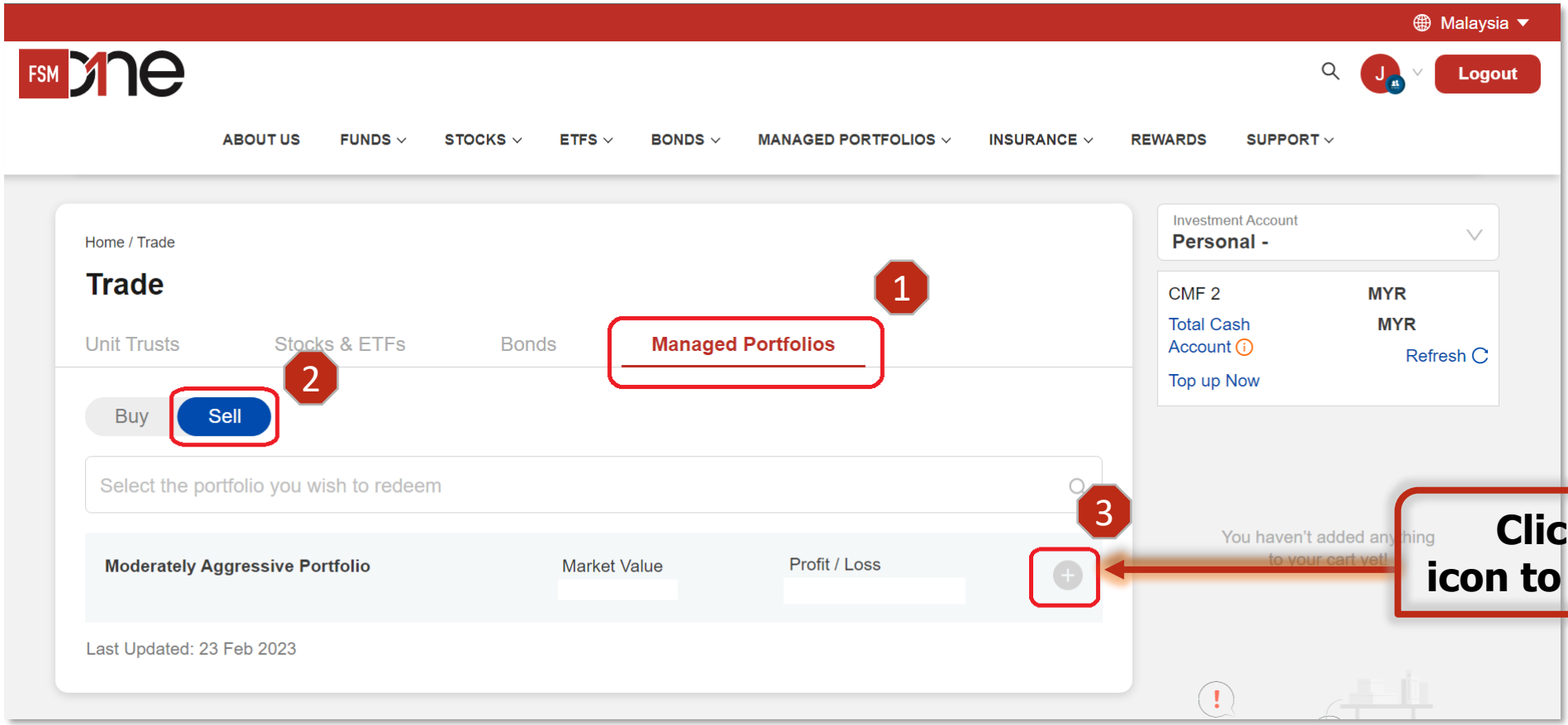
Step 1

- **Click on [Managed Portfolio]**



Selling Managed Portfolios on FSMOne

Step 2



Selling Managed Portfolios on FSMOne

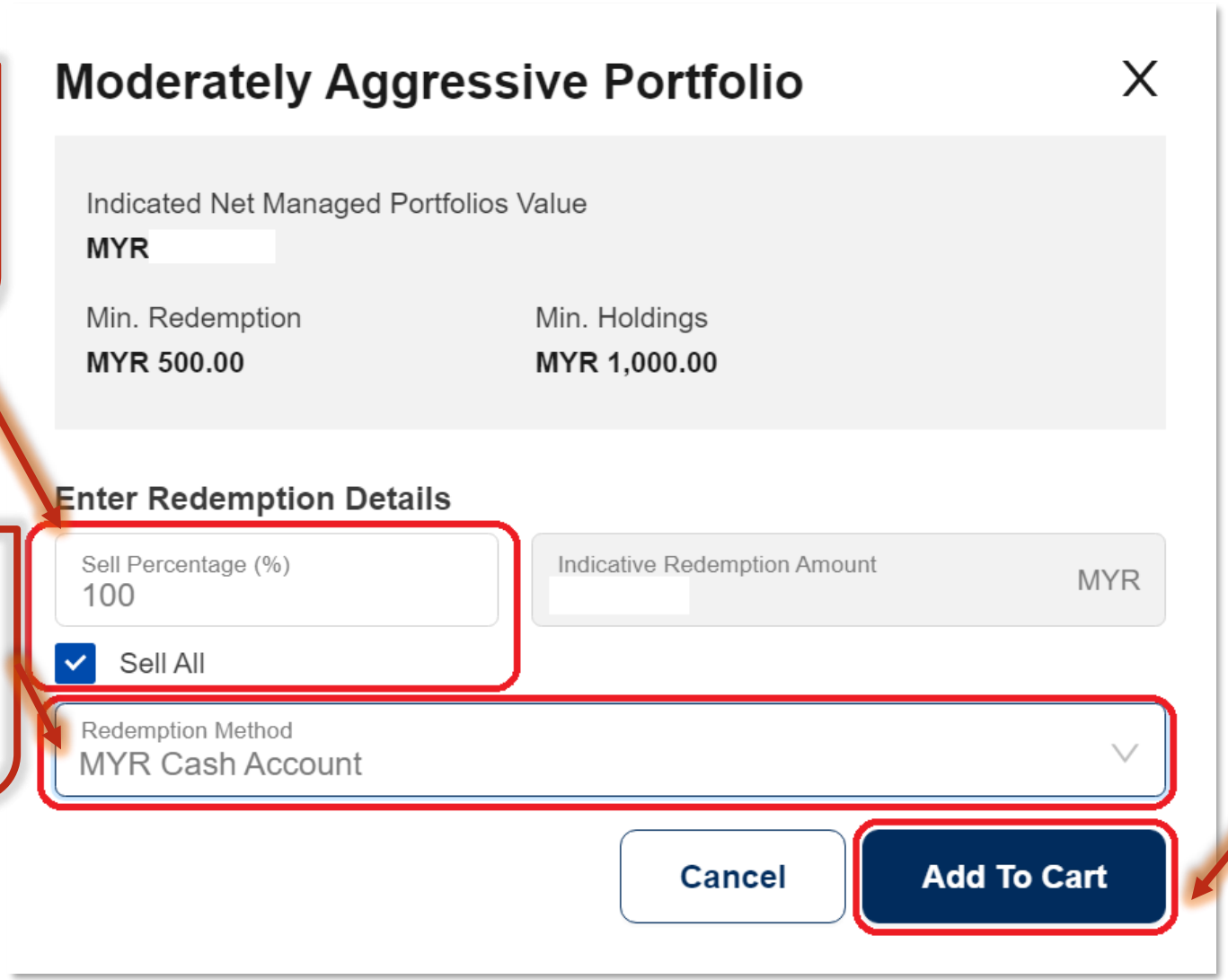
➲ Step 3

1

Enter the sell percentage or you may tick the [Sell All] box

2

Select Redemption Method
- **Cash Account**
- **CMF2**
- **Credit to Bank Account**

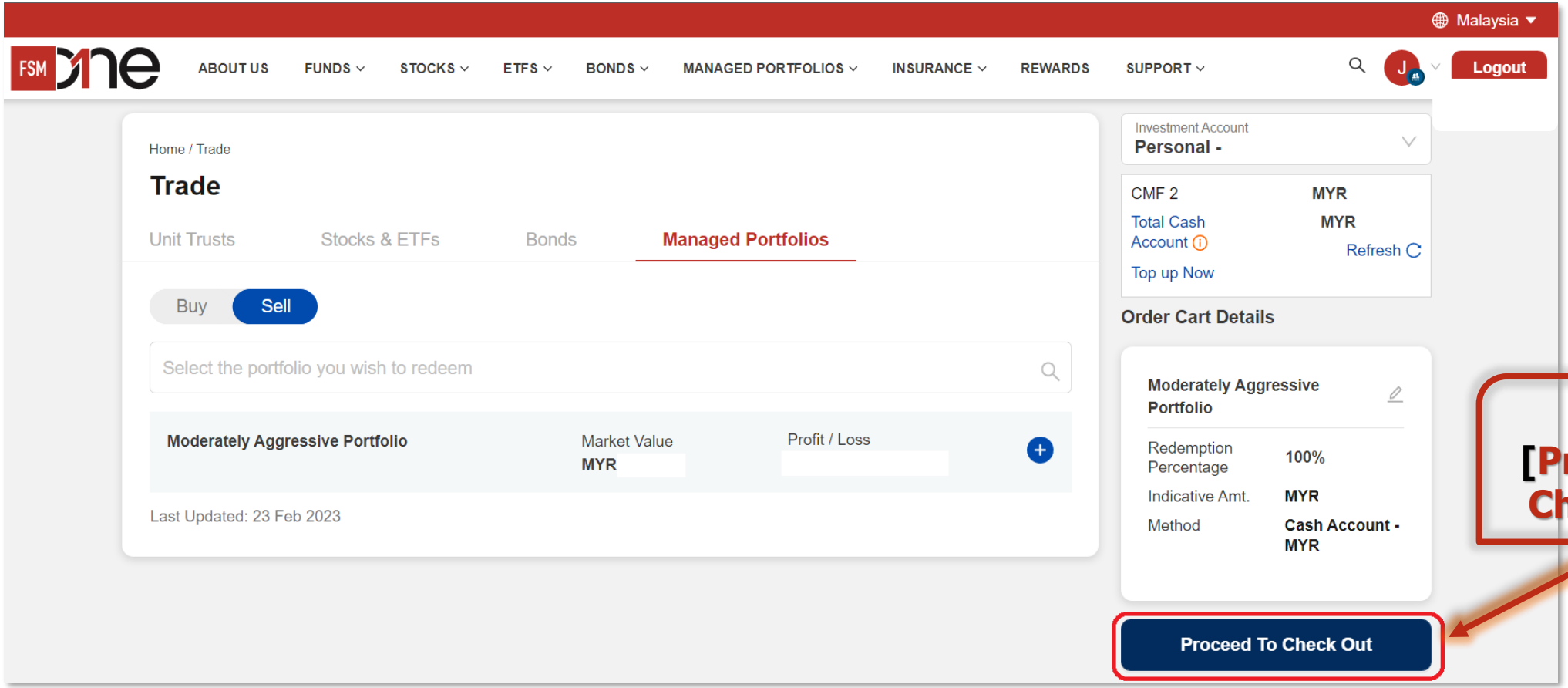


3

Click [Add to Cart]

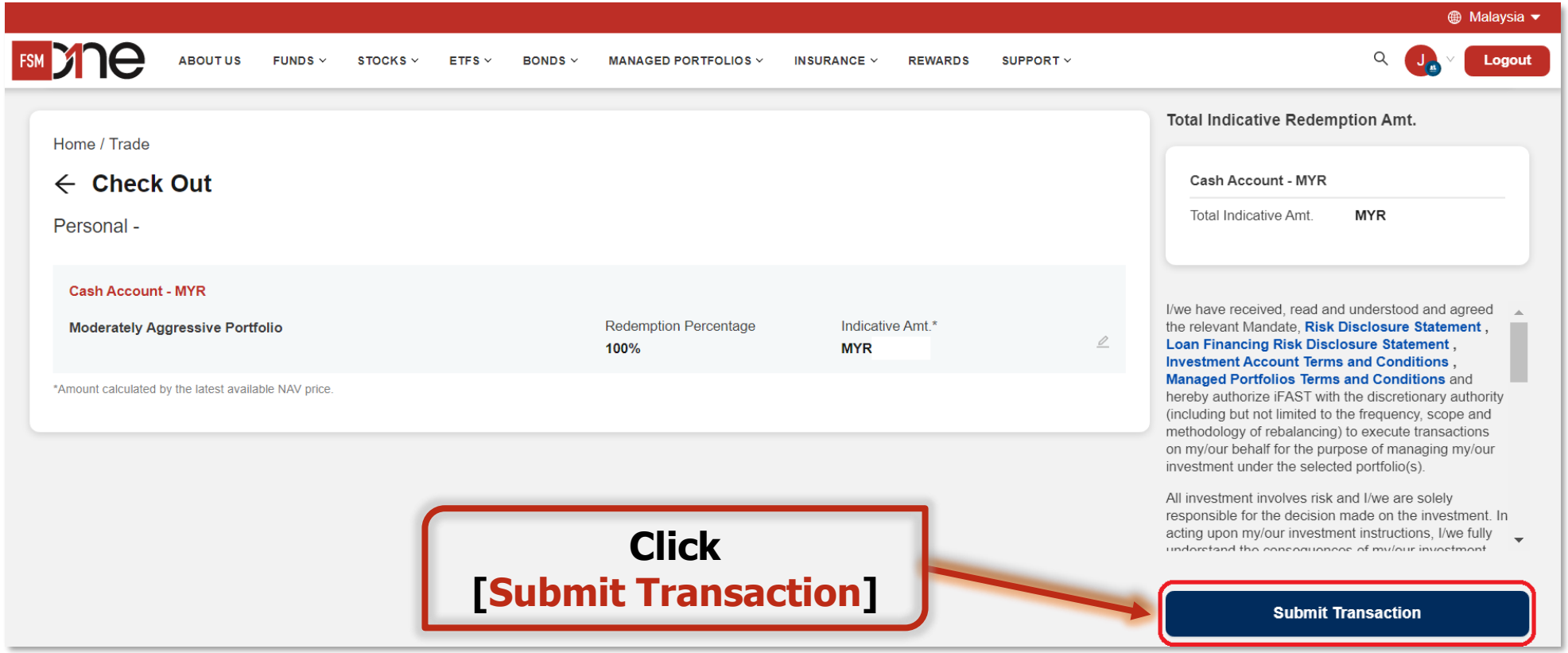
Selling Managed Portfolios on FSMOne

Step 4



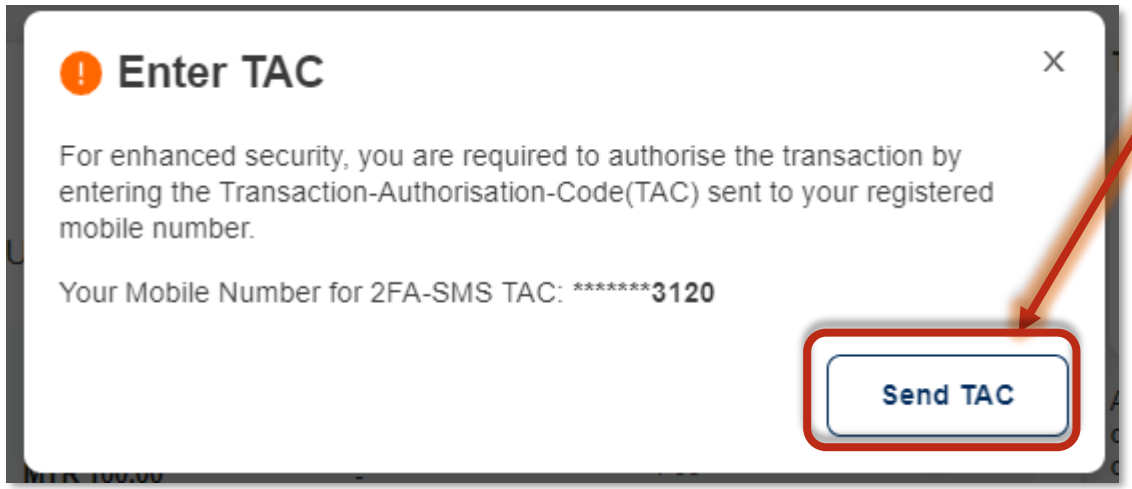
Selling Managed Portfolios on FSMOne

Step 5

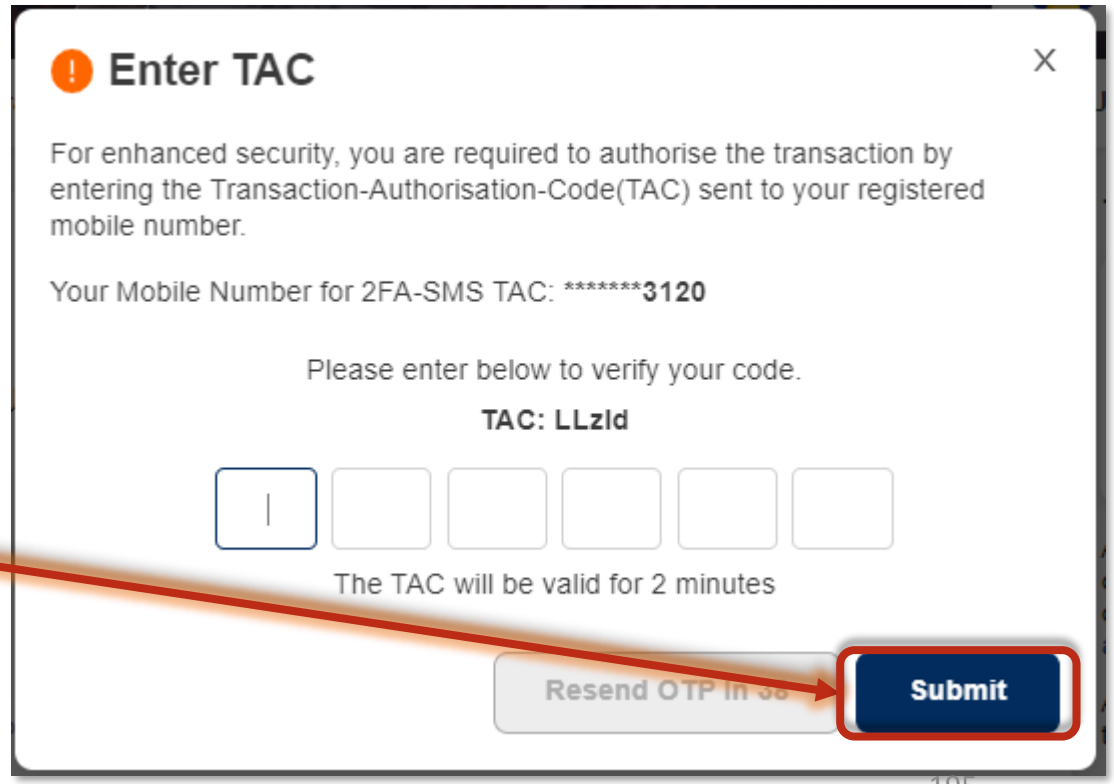


Selling Managed Portfolios on FSMOne

➲ Step 6



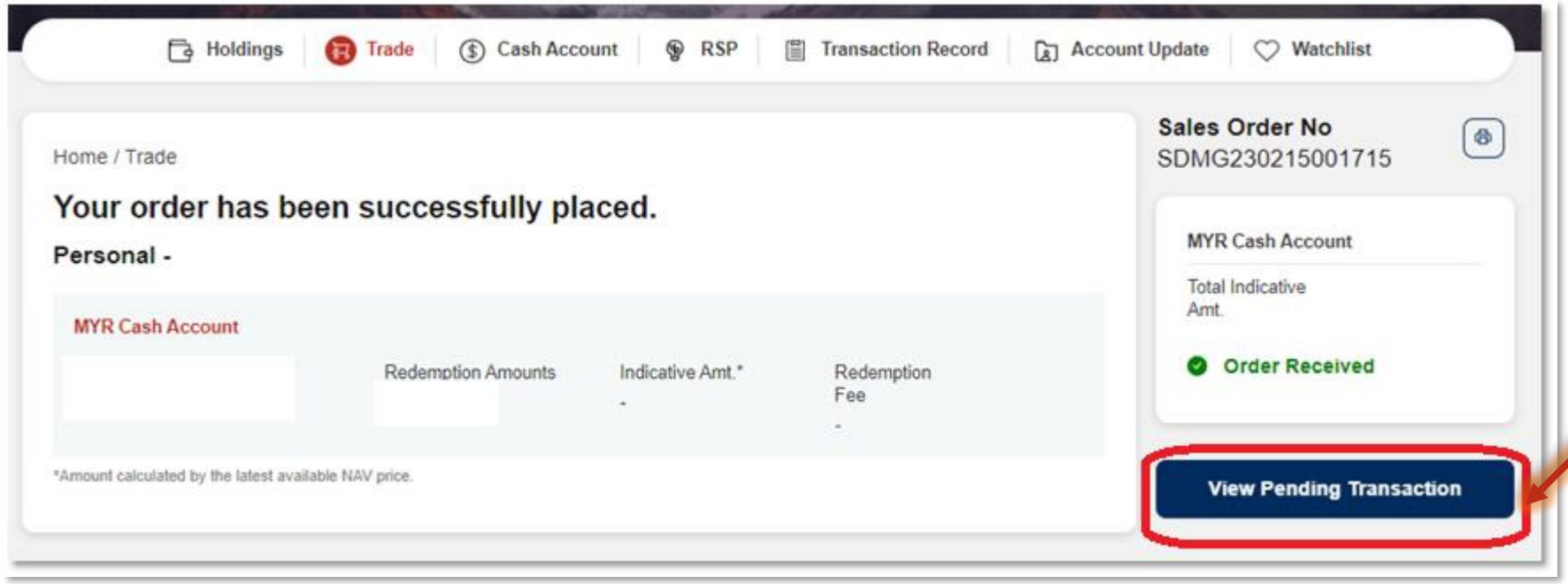
Click [Send TAC]



Enter TAC and Click [Submit]

Selling Managed Portfolios on FSMOne

- Done



Click [View Pending Transactions] to check the order status

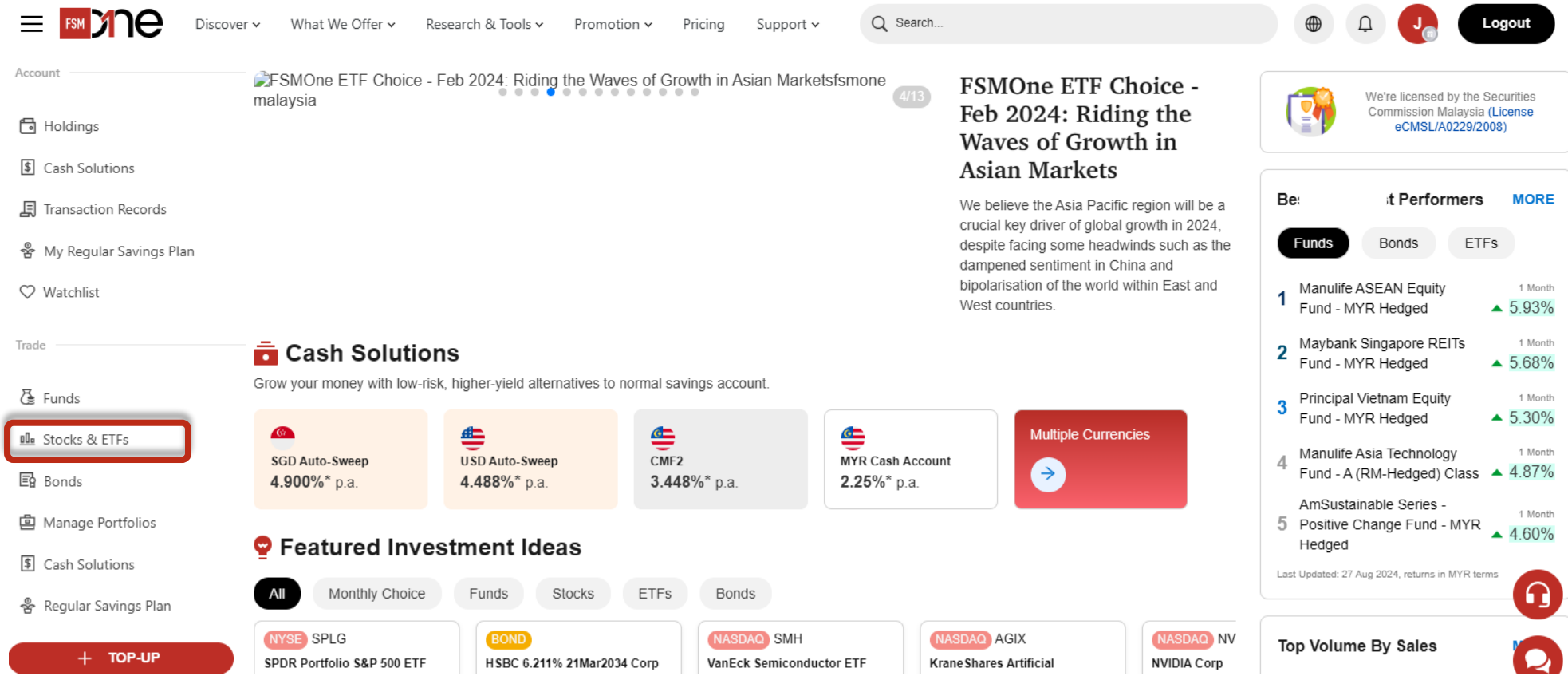
FSMOne step by step guide

BUY STOCKS

Buying stocks on FSMOne

Step 1

- **Click on [Stocks & ETFs]**

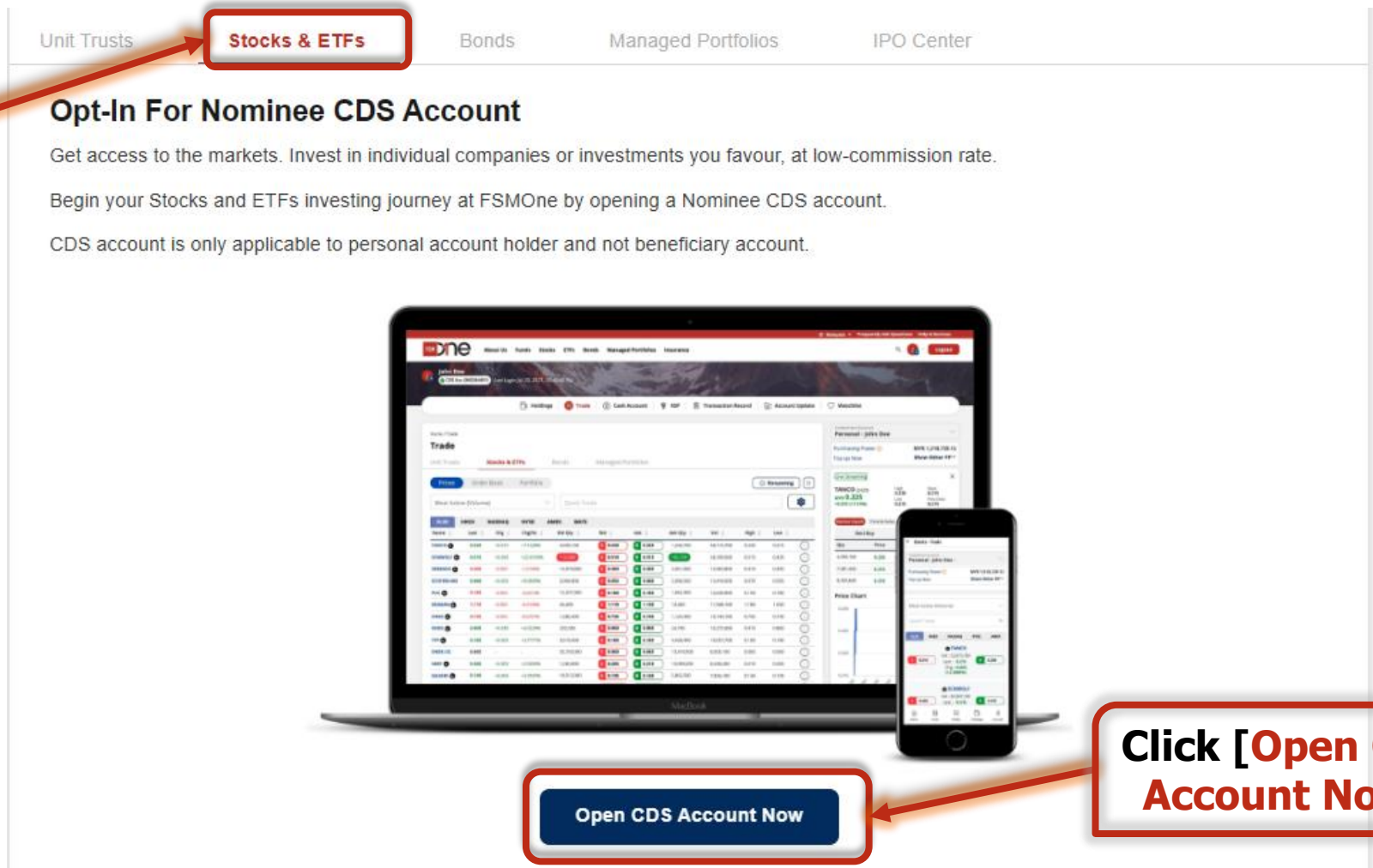


Buying stocks on FSMOne

➲ **Step 2a** If you don't have a CDS account with FSMOne

1

Click [Stocks & ETFs]



2

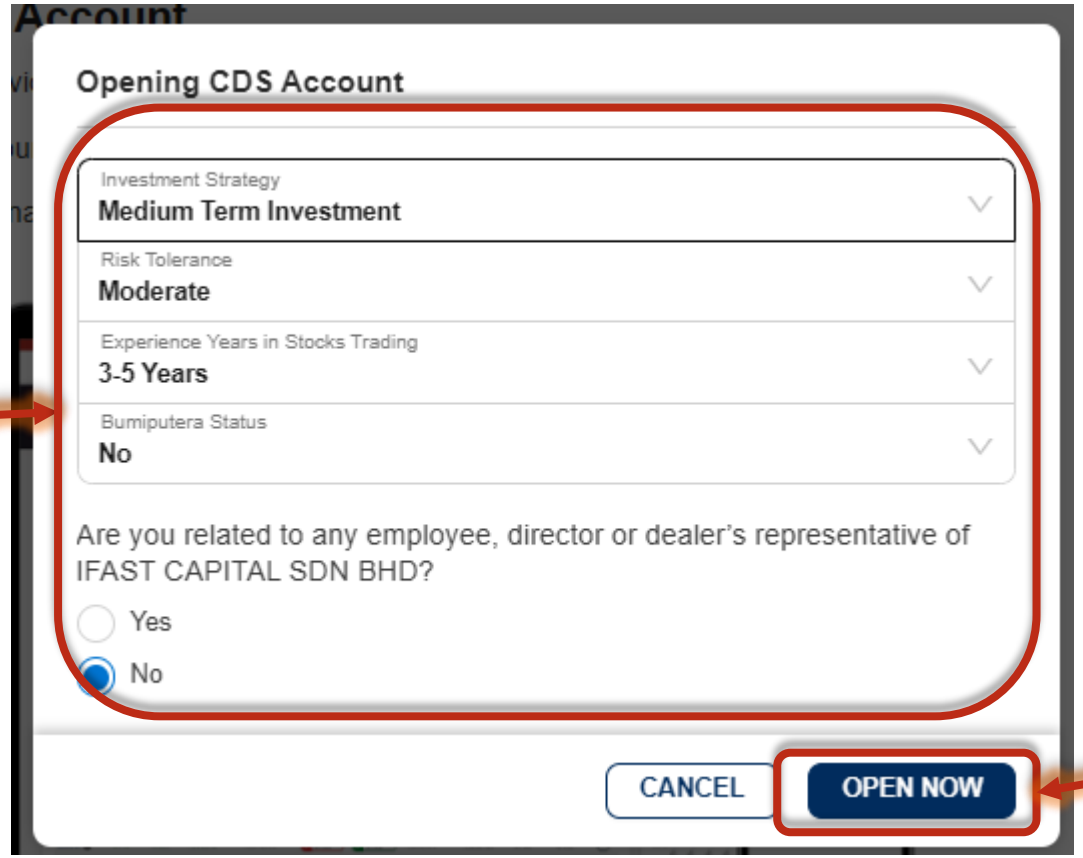
Click [Open CDS Account Now]

Buying stocks on FSMOne

- **Step 2a** If you don't have a CDS account with FSMOne

1

Fill up the form



2

Click [Open Now]

Buying stocks on FSMOne

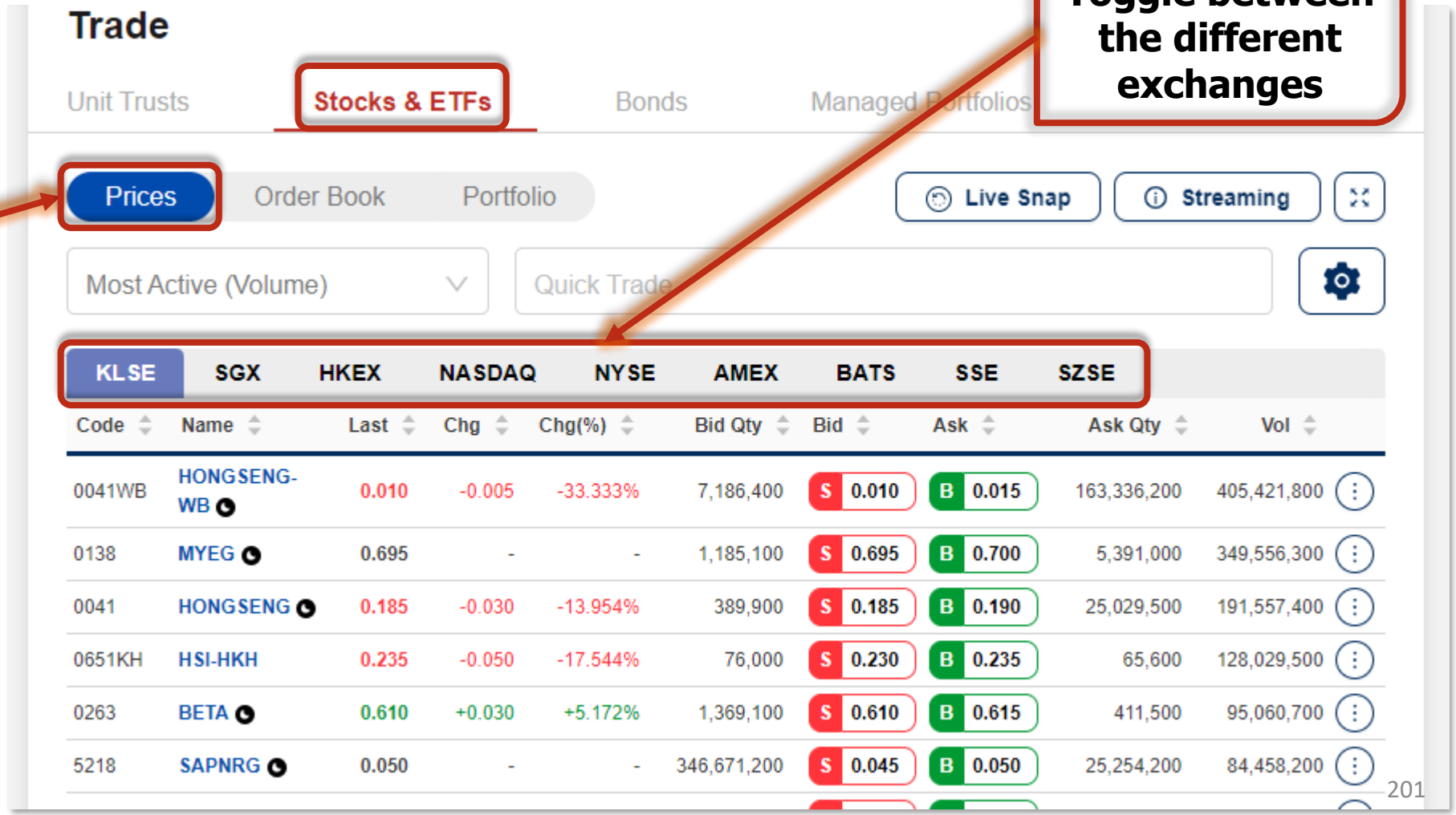
➲ Step 2b

1

Choose Stocks & ETFs > Prices

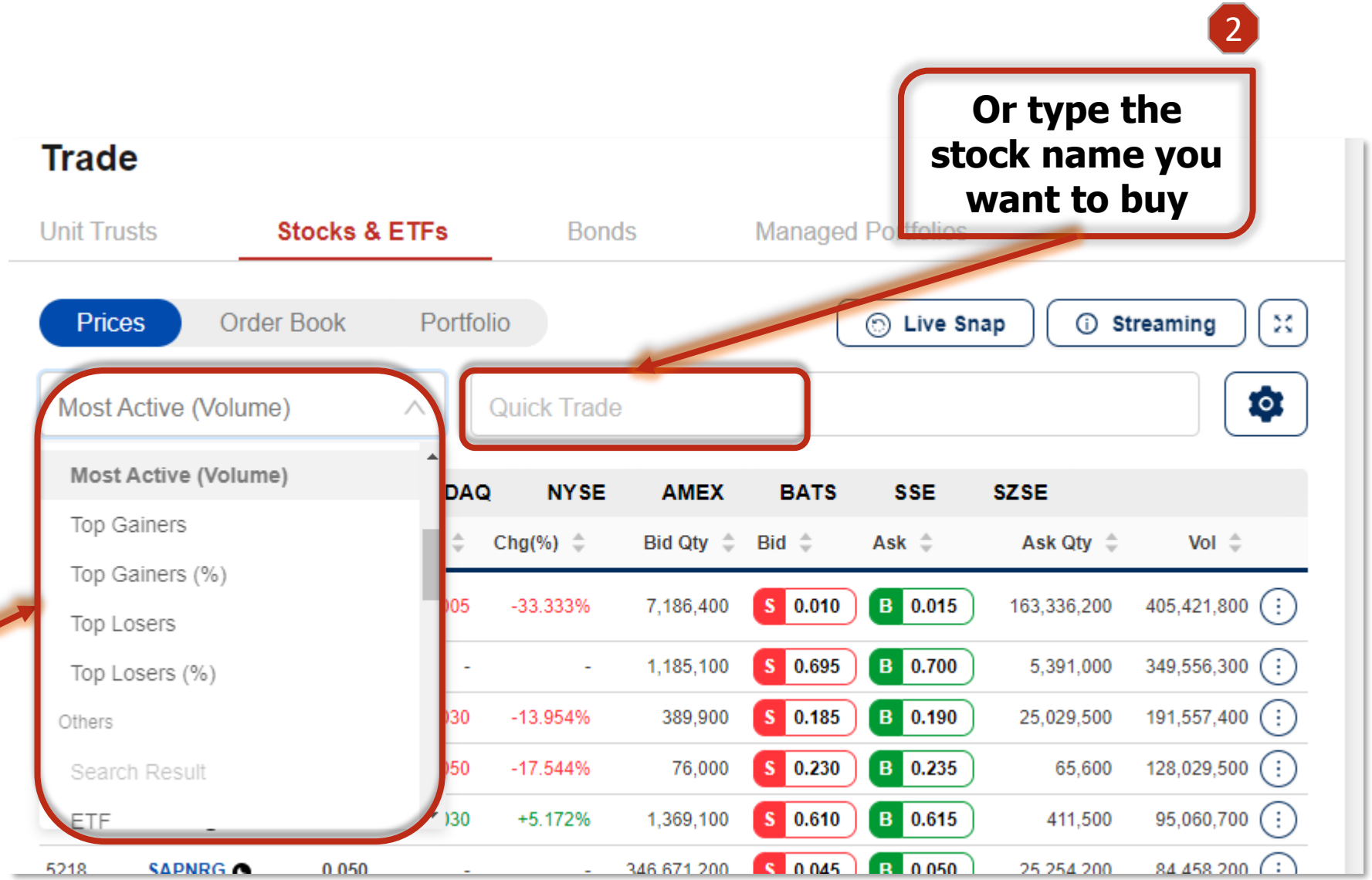
2

Toggle between the different exchanges



Buying stocks on FSMOne

Step 3

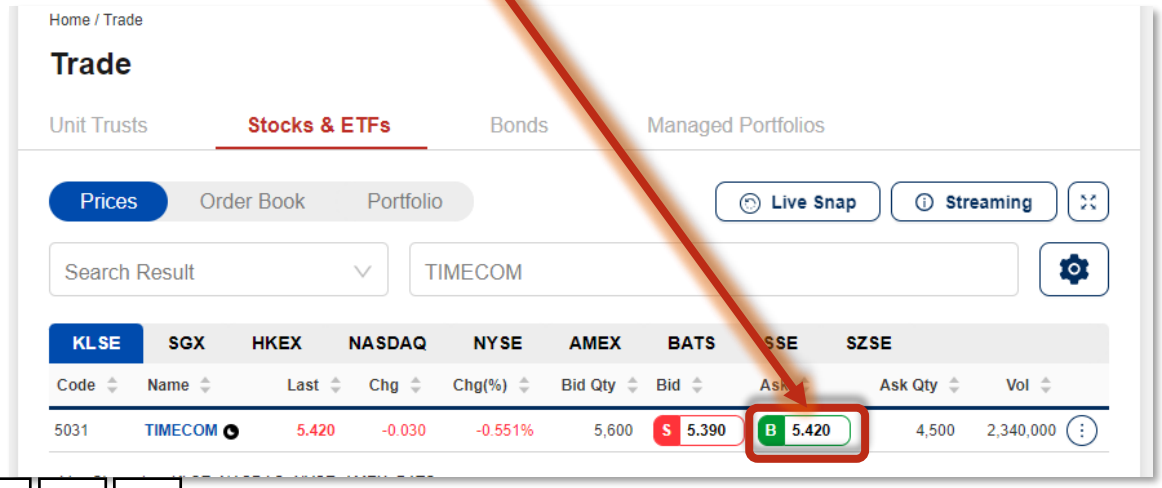


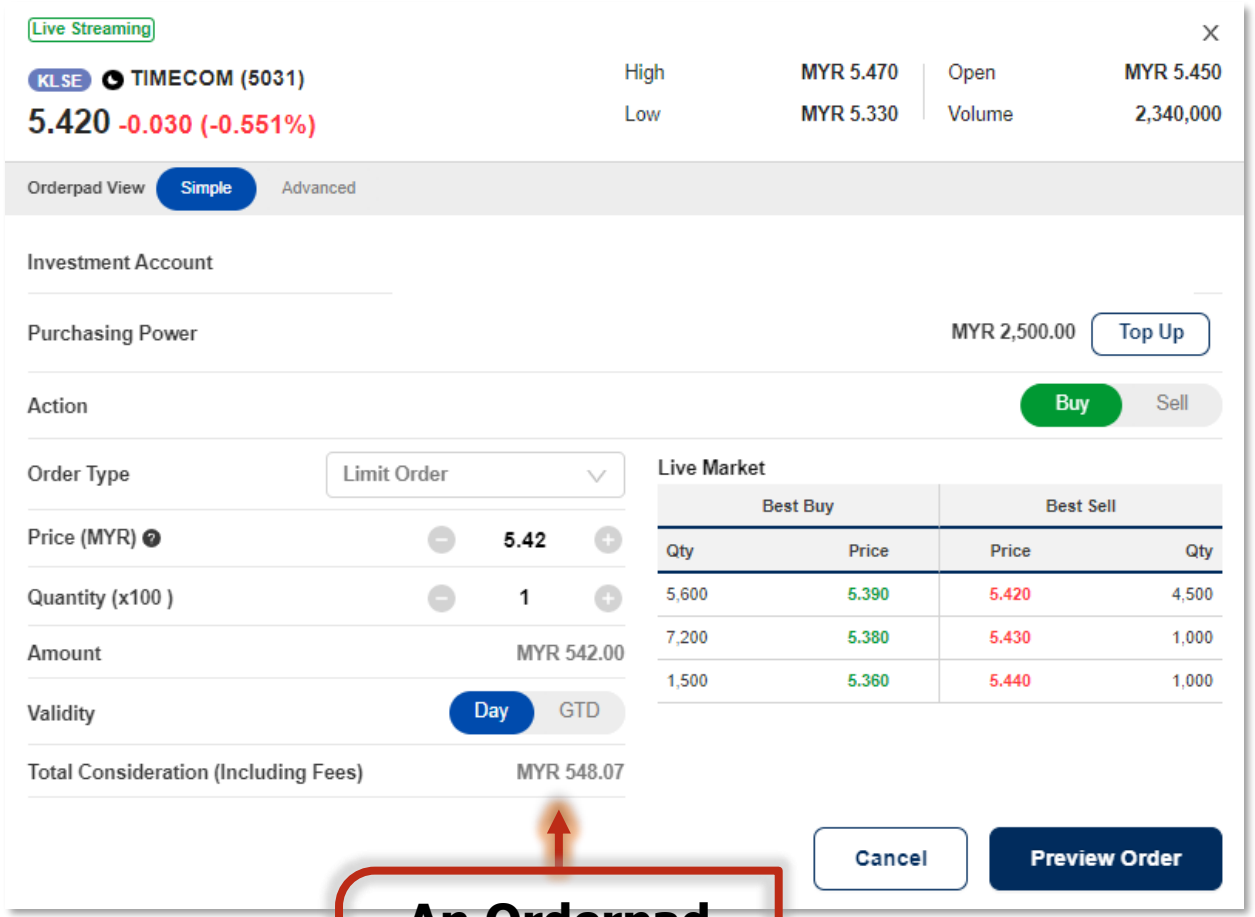
Buying stocks on FSMOne

Step 4

1

Select your stock and click on the [Green Buy] button



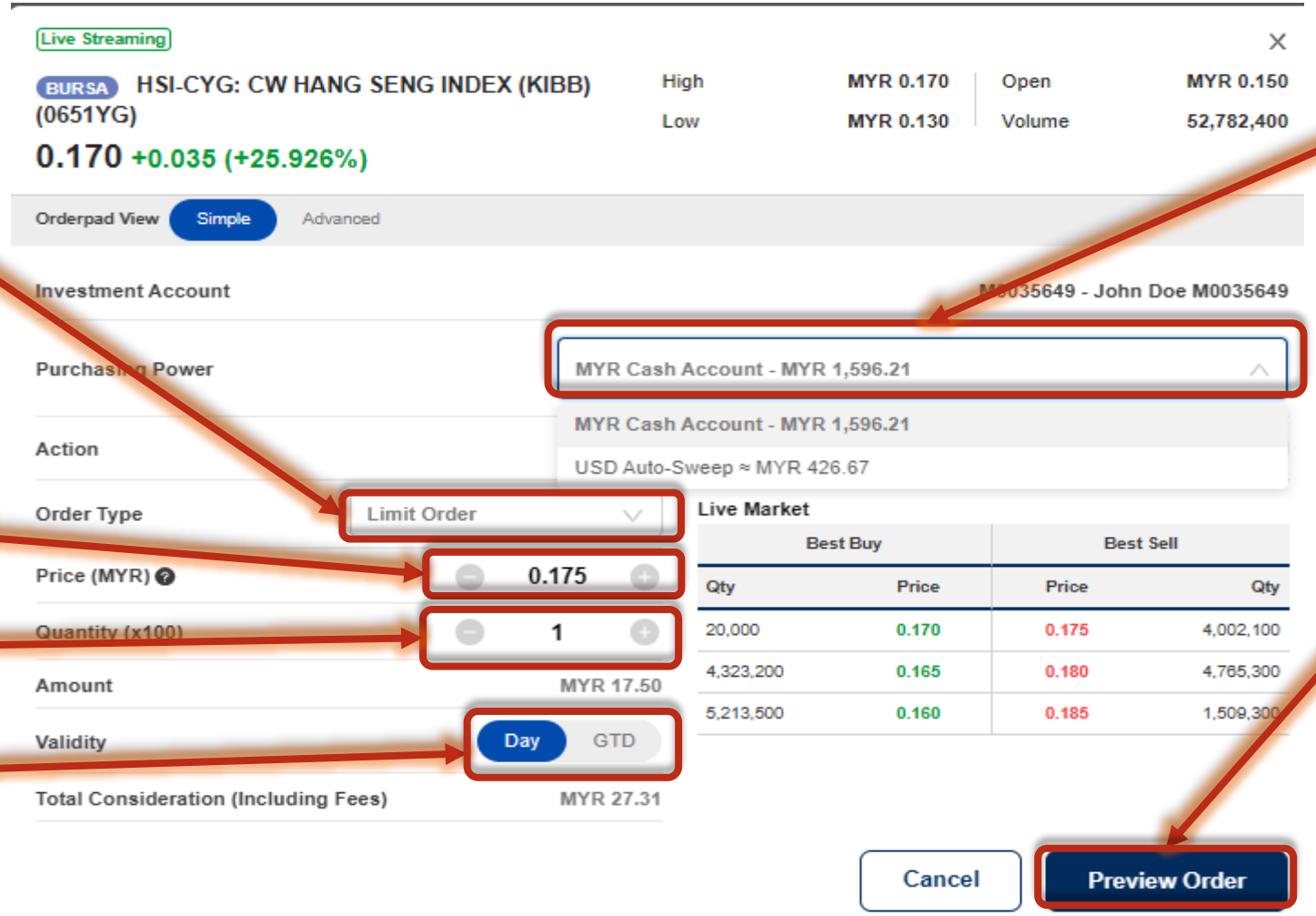


An Orderpad Window will pop-out

2

Buying stocks on FSMOne

➲ Step 5



1 **Choose Cash Account**

2 **Select Order Type**
- Market Order
- Limit Order
- Market to Limit Order

3 **Key in Buy Price**

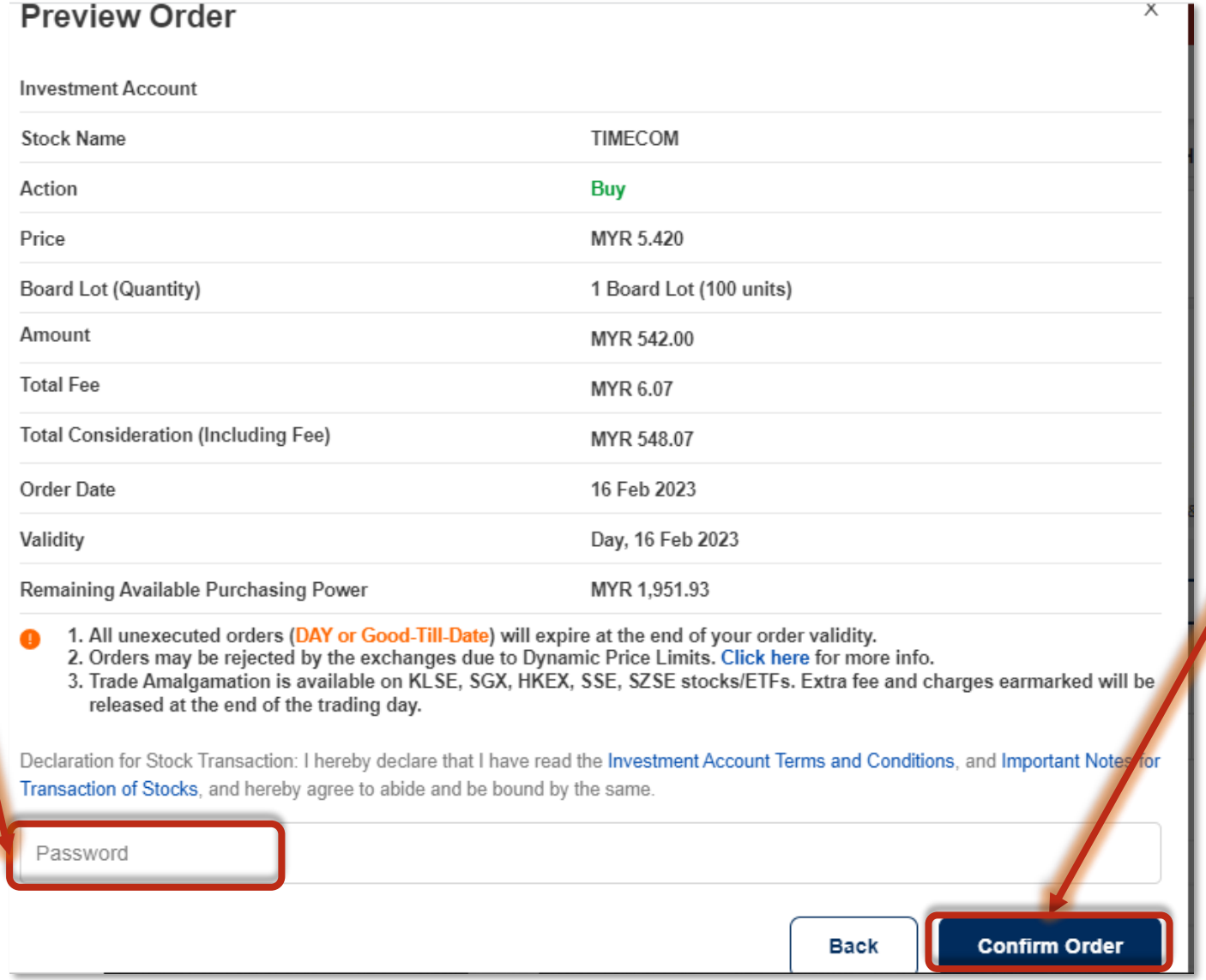
4 **Key in Quantity**

5 **Pick Validity**

6 **Preview Order**

Buying stocks on FSMOne

Step 6



1

Key in Password

2

Click [Confirm Order]

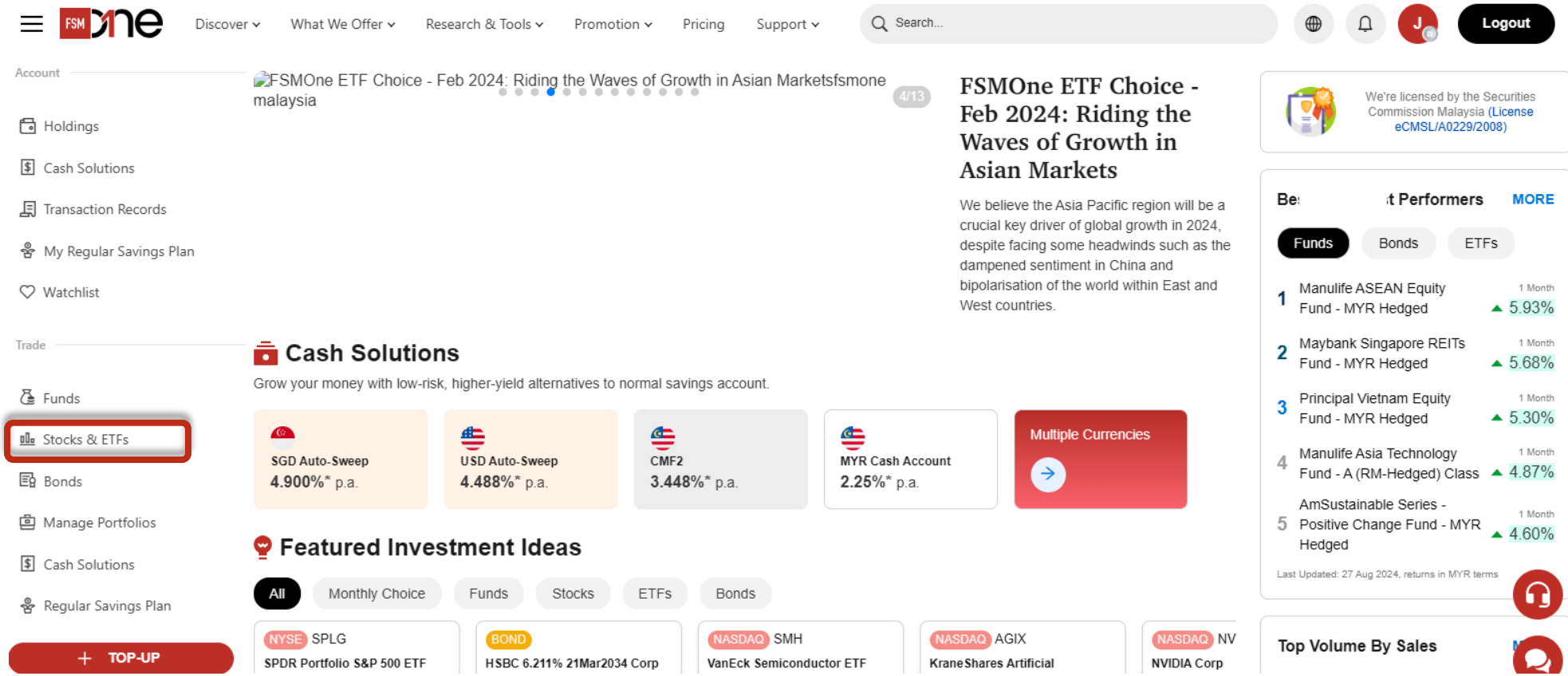
FSMOne step by step guide

SELL Stocks

Selling stocks on FSMOne

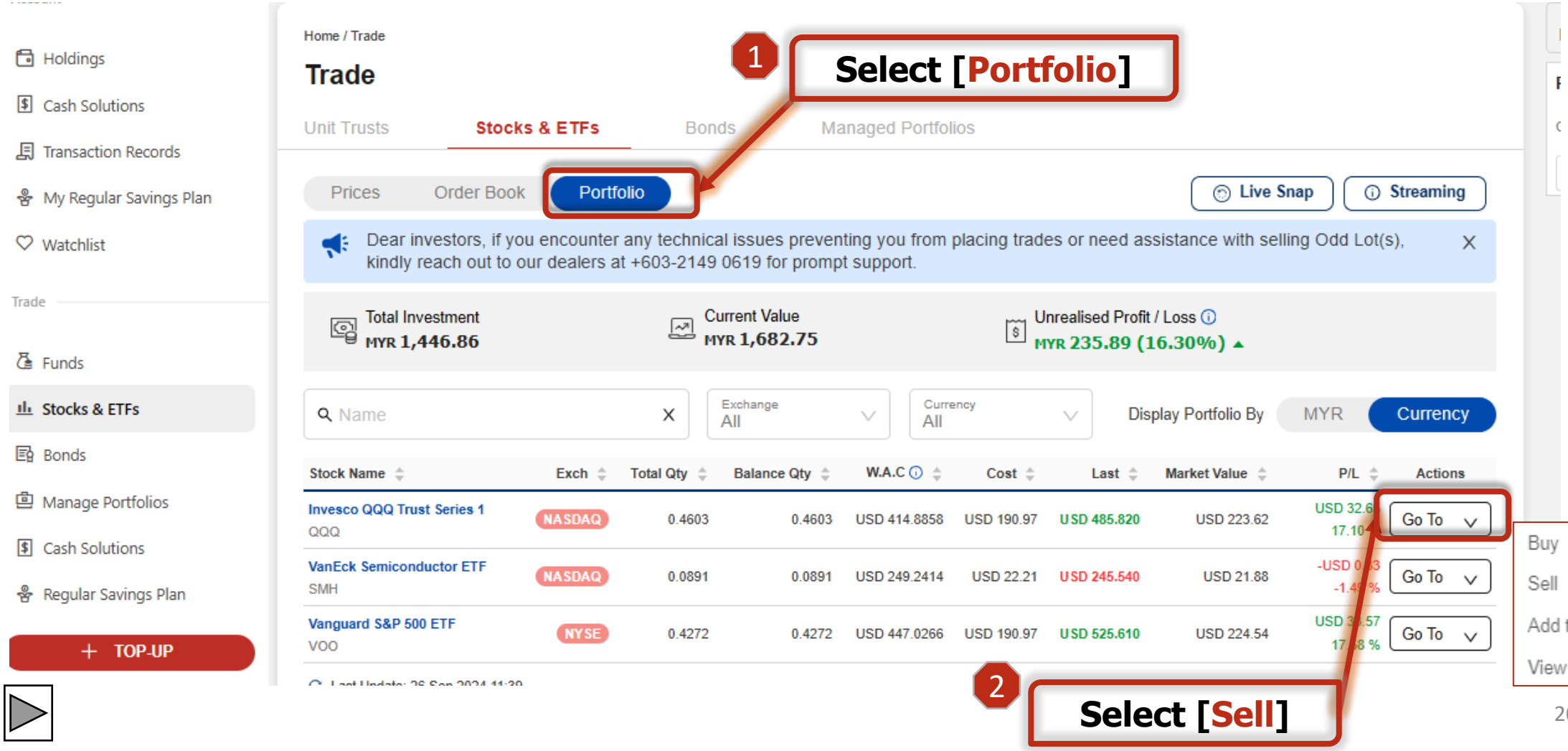
Step 1

- **Click on [Stocks & ETFs]**



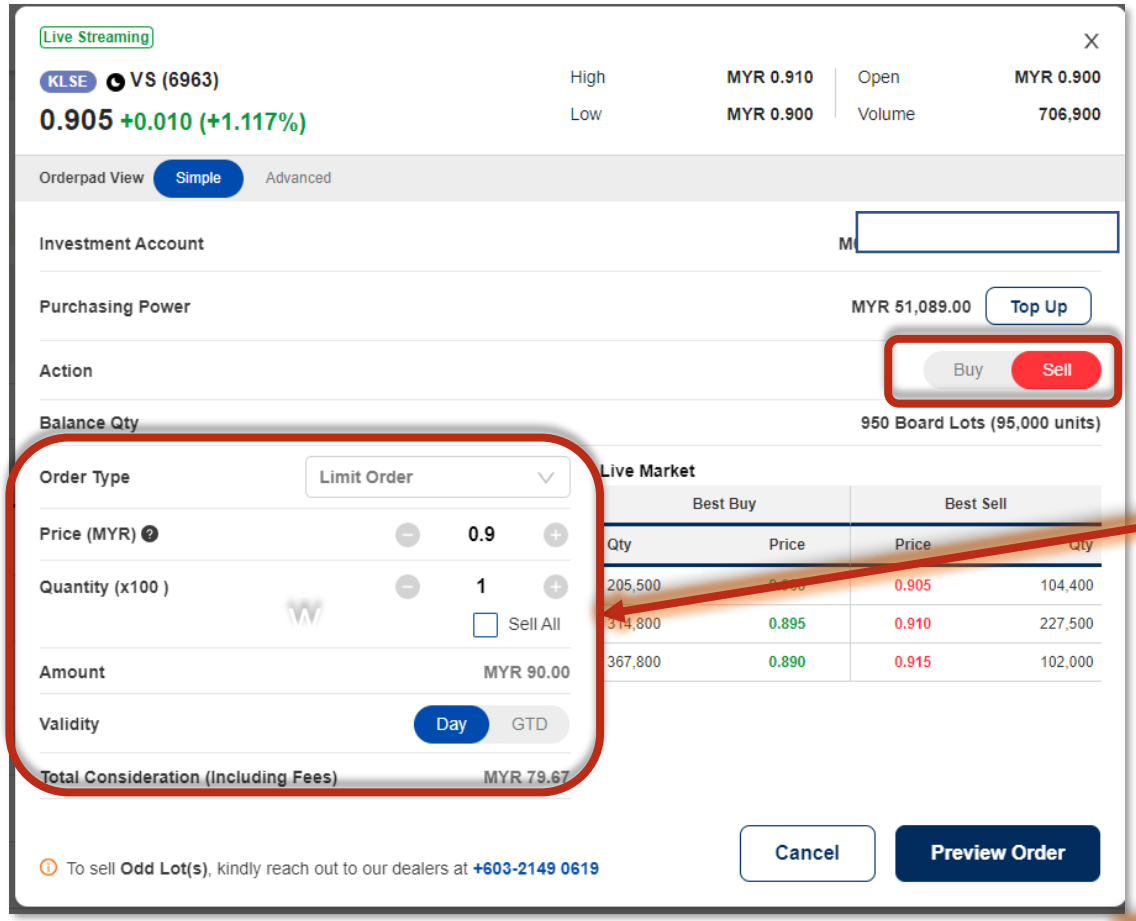
Selling stocks on FSMOne

Step 2



Selling stocks on FSMOne

Step 3



1

Make sure toggled to [Sell]

2

Select [Order Type & Validity] & Enter [Price and Quantity]

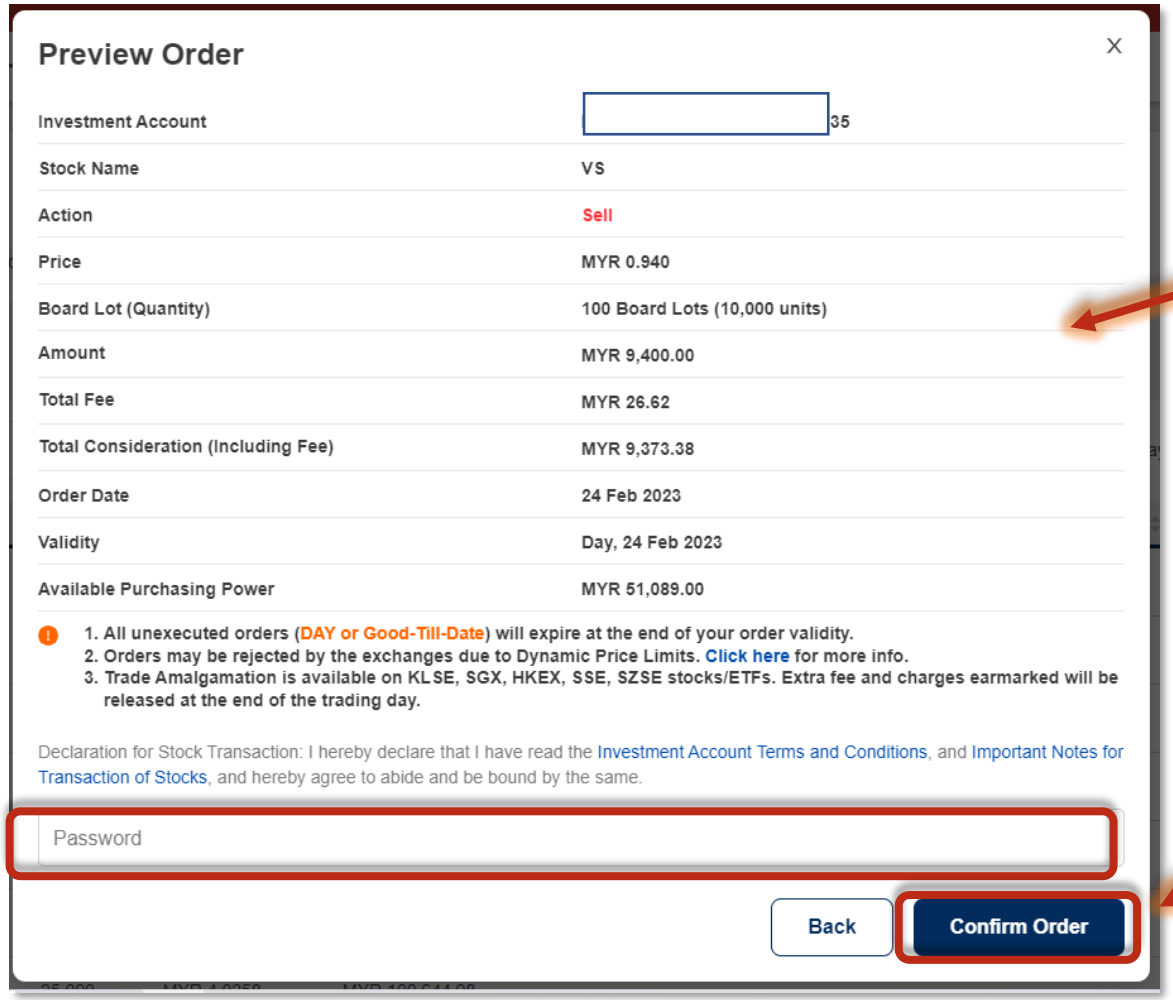


3

Click [Preview Order]

Selling stocks on FSMOne

Step 4



1

Make sure all the details are correct

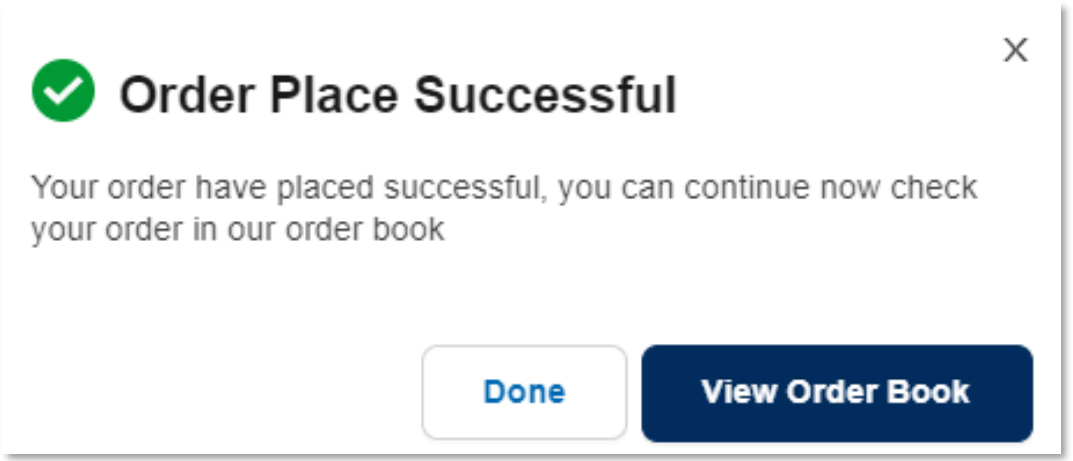
2

Enter your [FSMOne password] and click [Confirm Order]

Selling stocks on FSMOne

Step 5

Sell order has been placed successfully



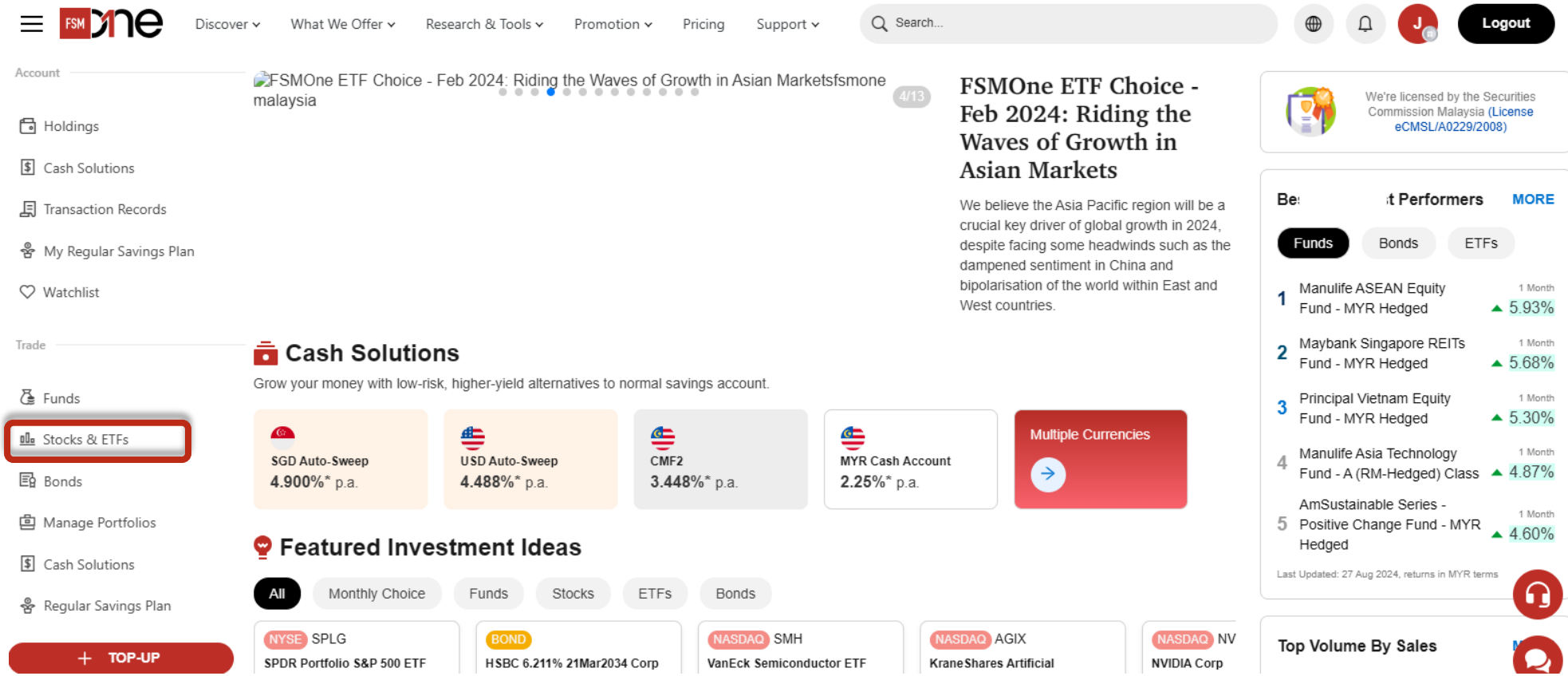
FSMOne step by step guide

Exchange Traded Fund (ETF) - BUY

Buying ETFs on FSMOne

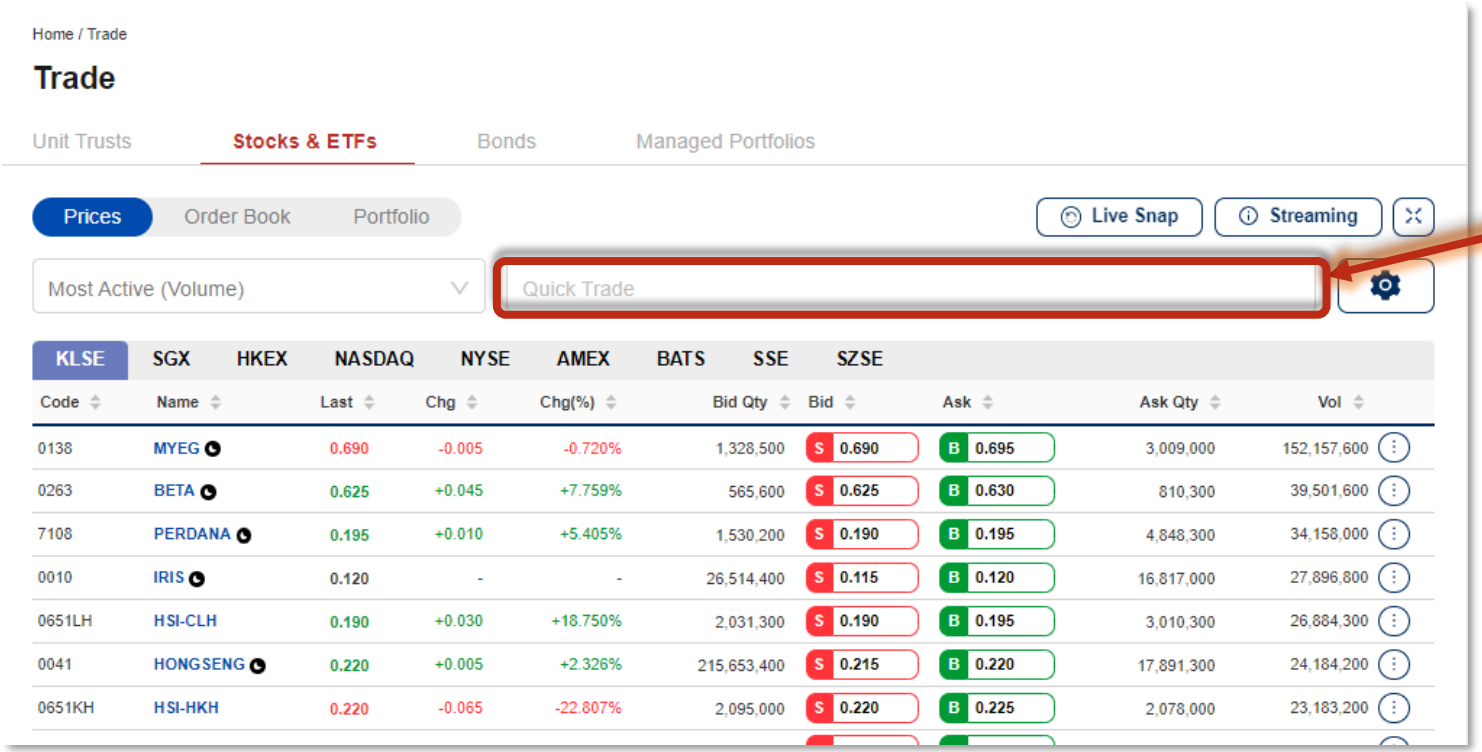
Step 1

- **Click on [Stocks & ETFs]**



Buying ETFs on FSMOne

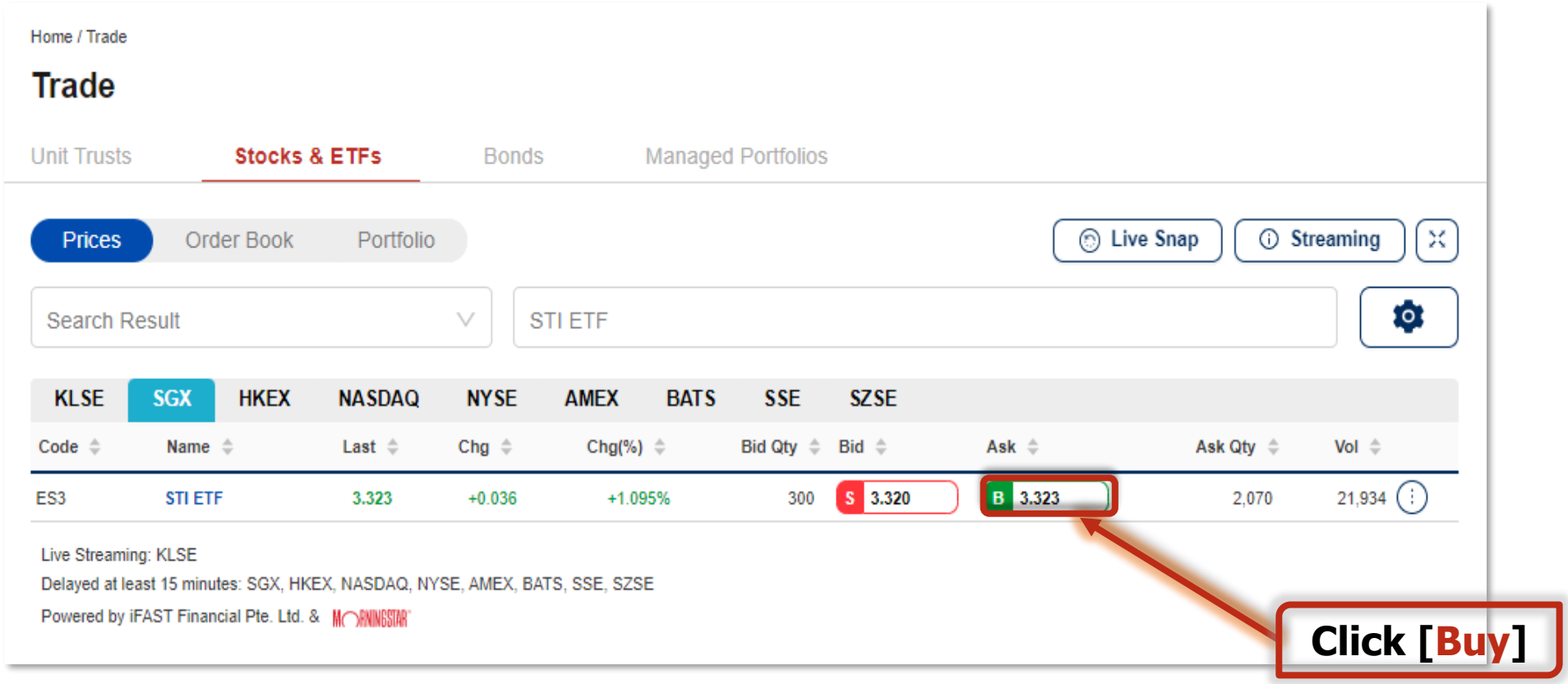
Step 2



Enter the [Name/Code of ETF] in the search bar

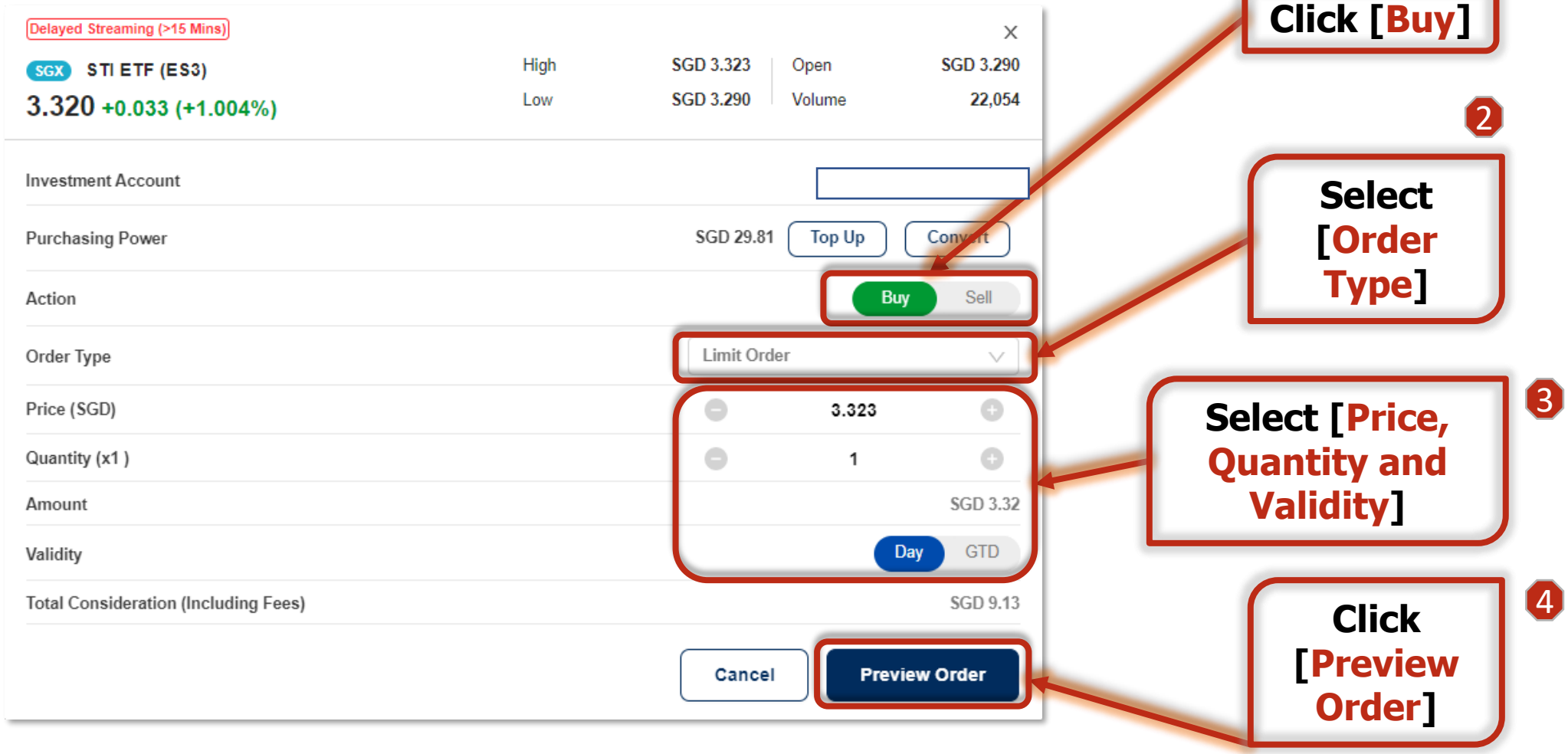
Buying ETFs on FSMOne

Step 3



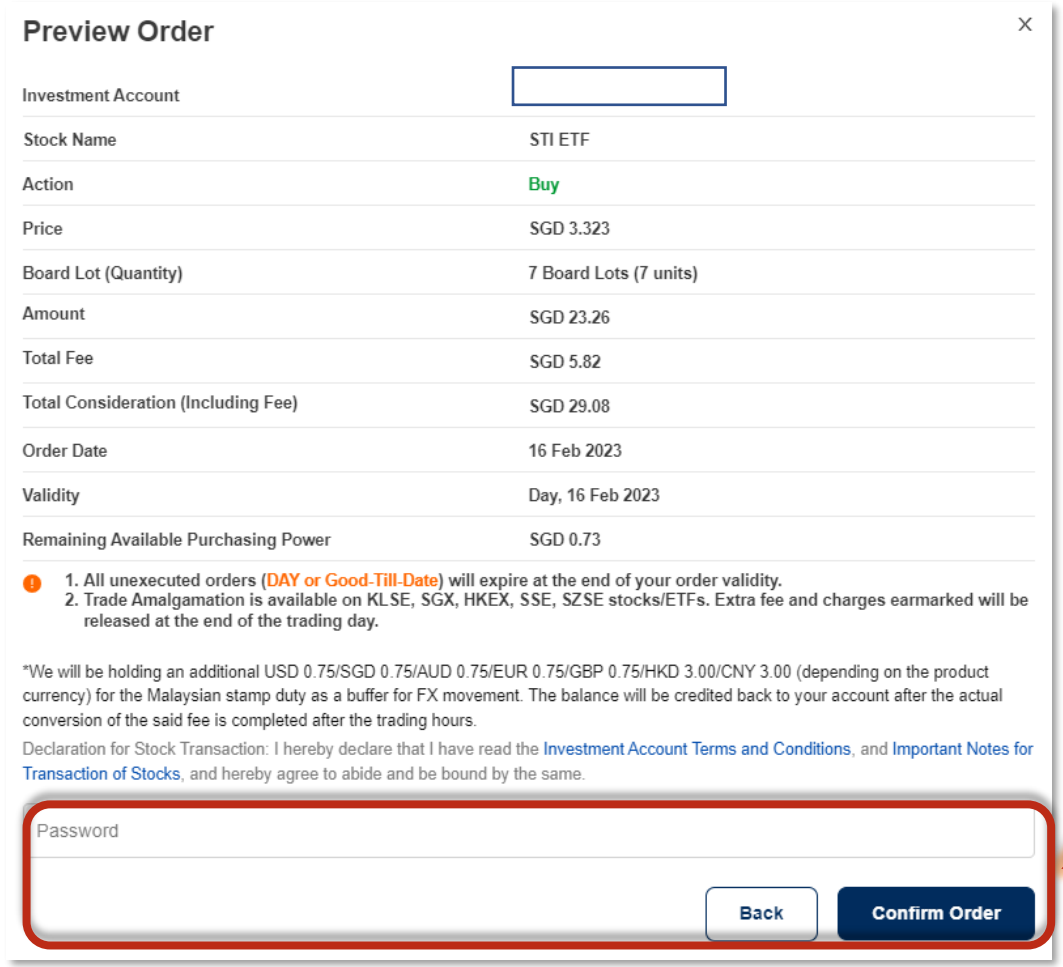
Buying ETFs on FSMOne

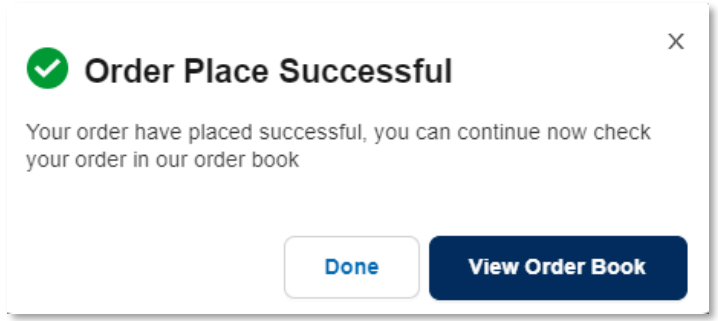
Step 4



Buying ETFs on FSMOne

Step 5





1

Enter [Password] & Click [Confirm Order]

2

Order has been placed

***The ETF will be shown in your holdings the next day**

FSMOne step by step guide

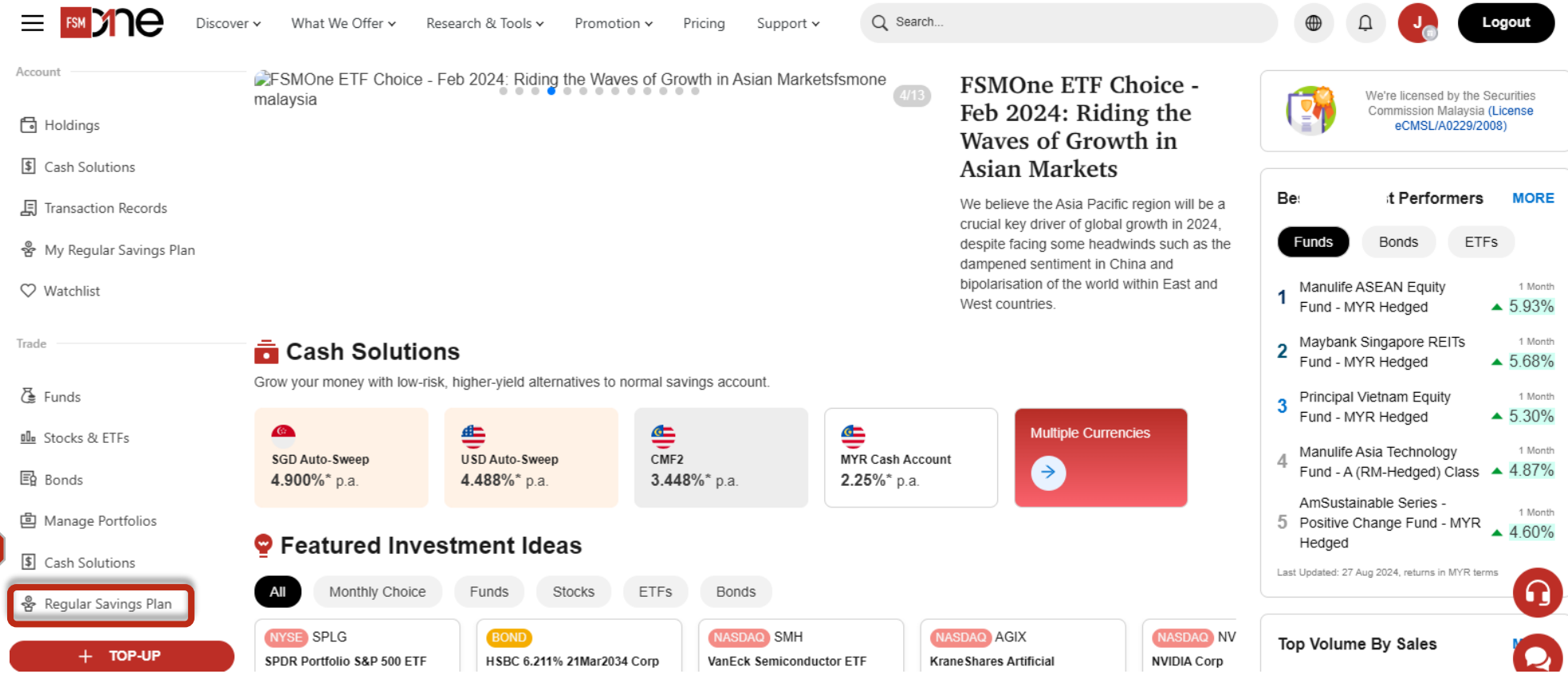
Exchange Traded Fund (ETF)

setup Regular Saving Plan (RSP)

ETF RSP set up on FSMOne

Step 1

- **Click on [Regular Savings Plan]**

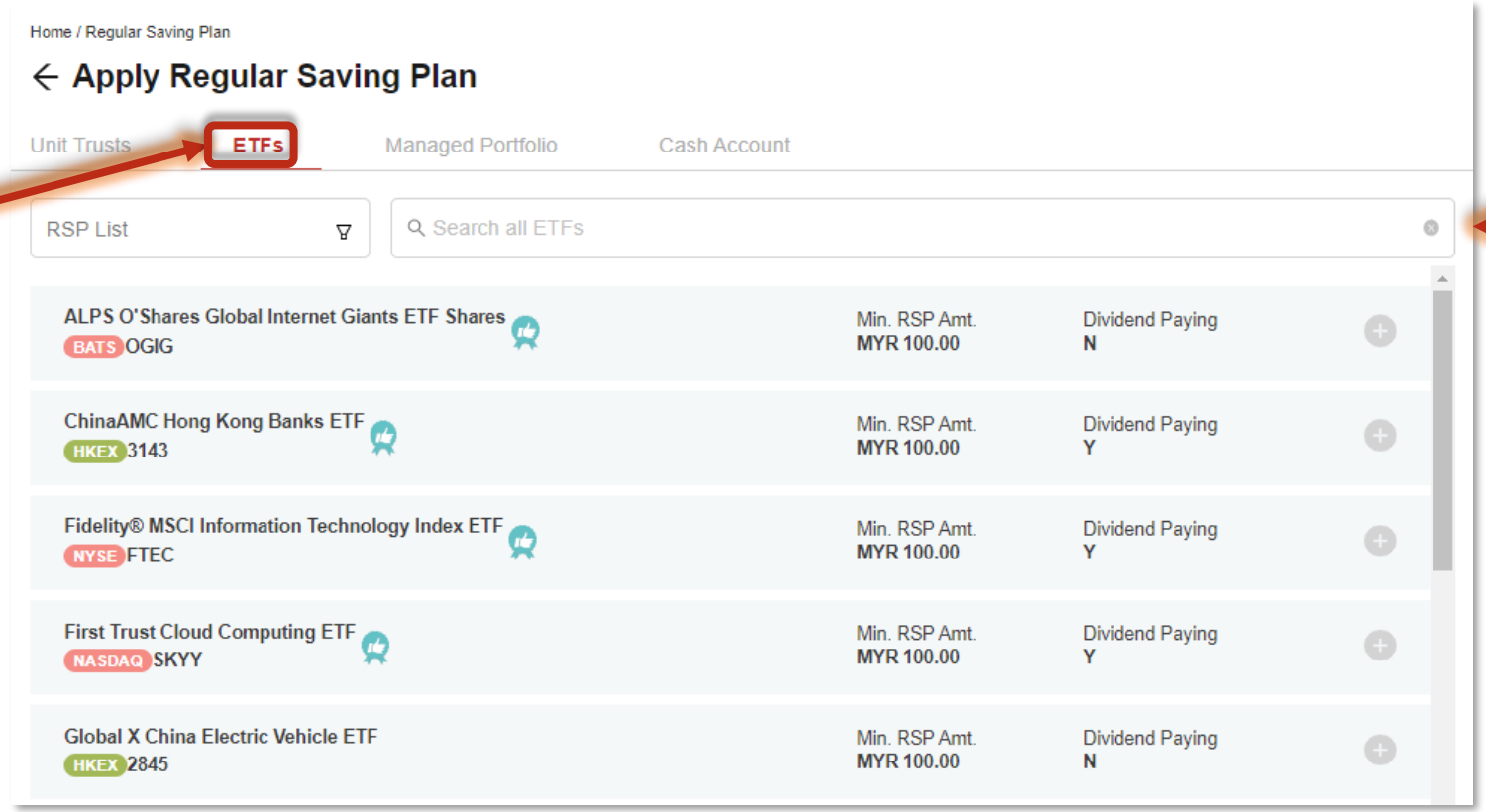


ETF RSP set up on FSMOne

Step 2

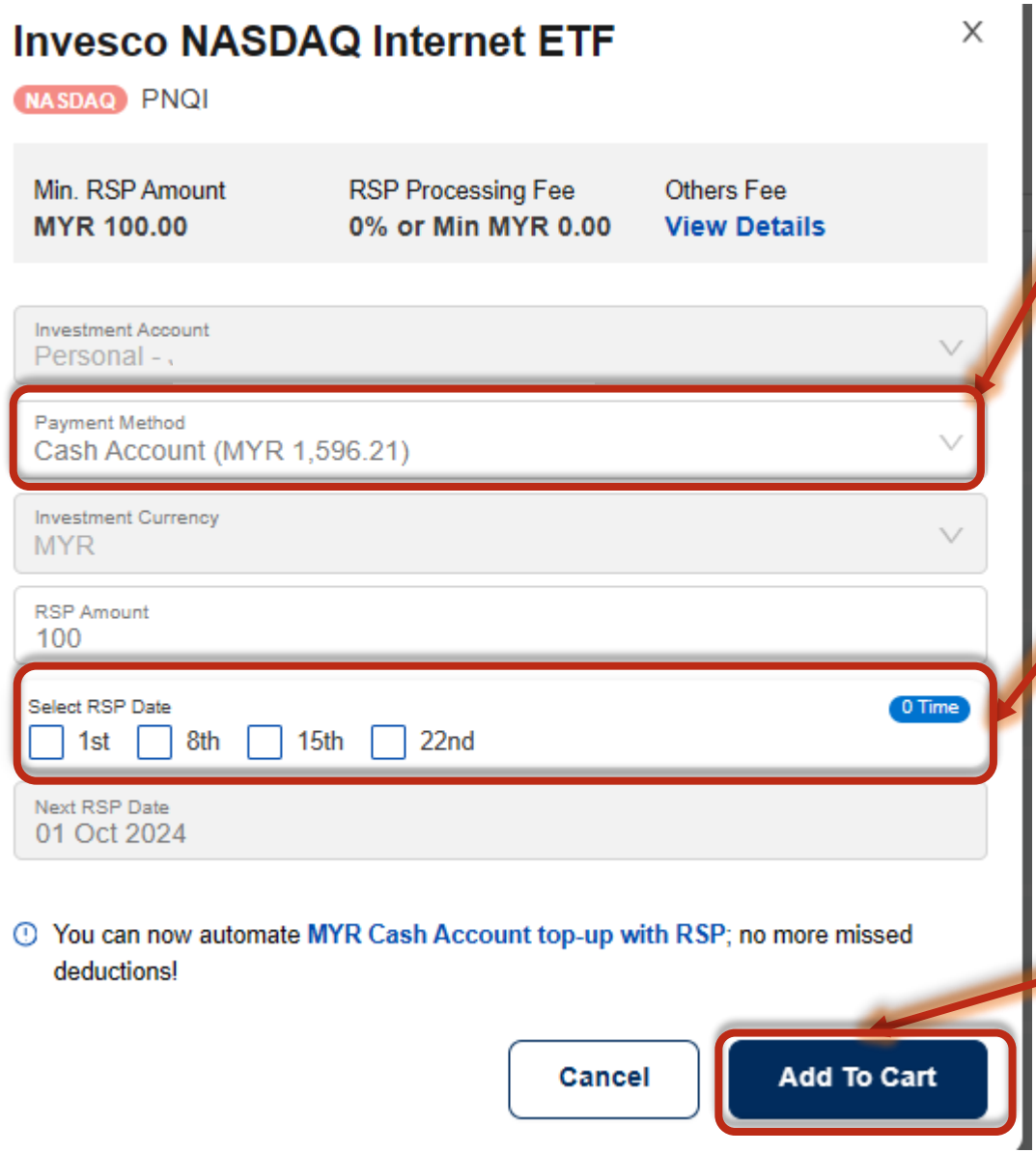
1 Select [ETFs] section

2 Enter the [ETF Name or Code]



ETF RSP set up on FSMOne

Step 4



1

Choose payment Method

- **Cash Account**
- **USD Auto Sweep**

2

Enter [RSP Amount & RSP Date]

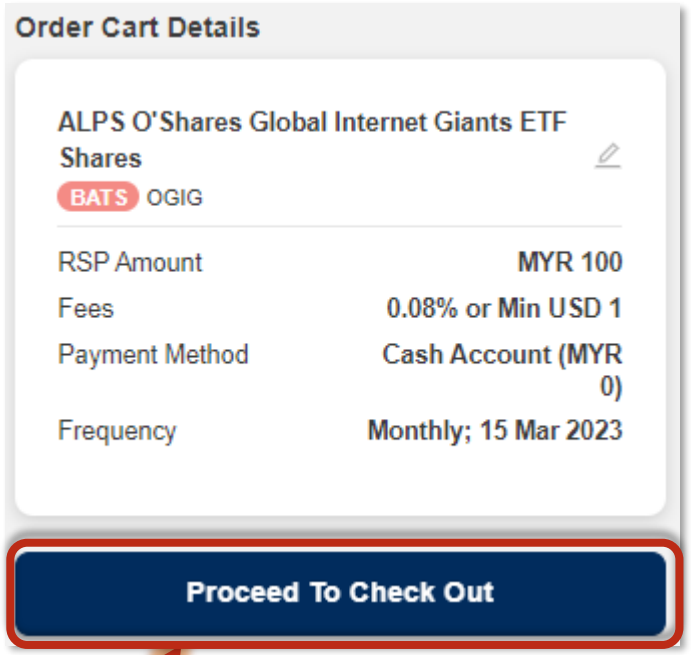
3

Click [Add To Cart]

You can select up to 4 dates, as your monthly buy frequency

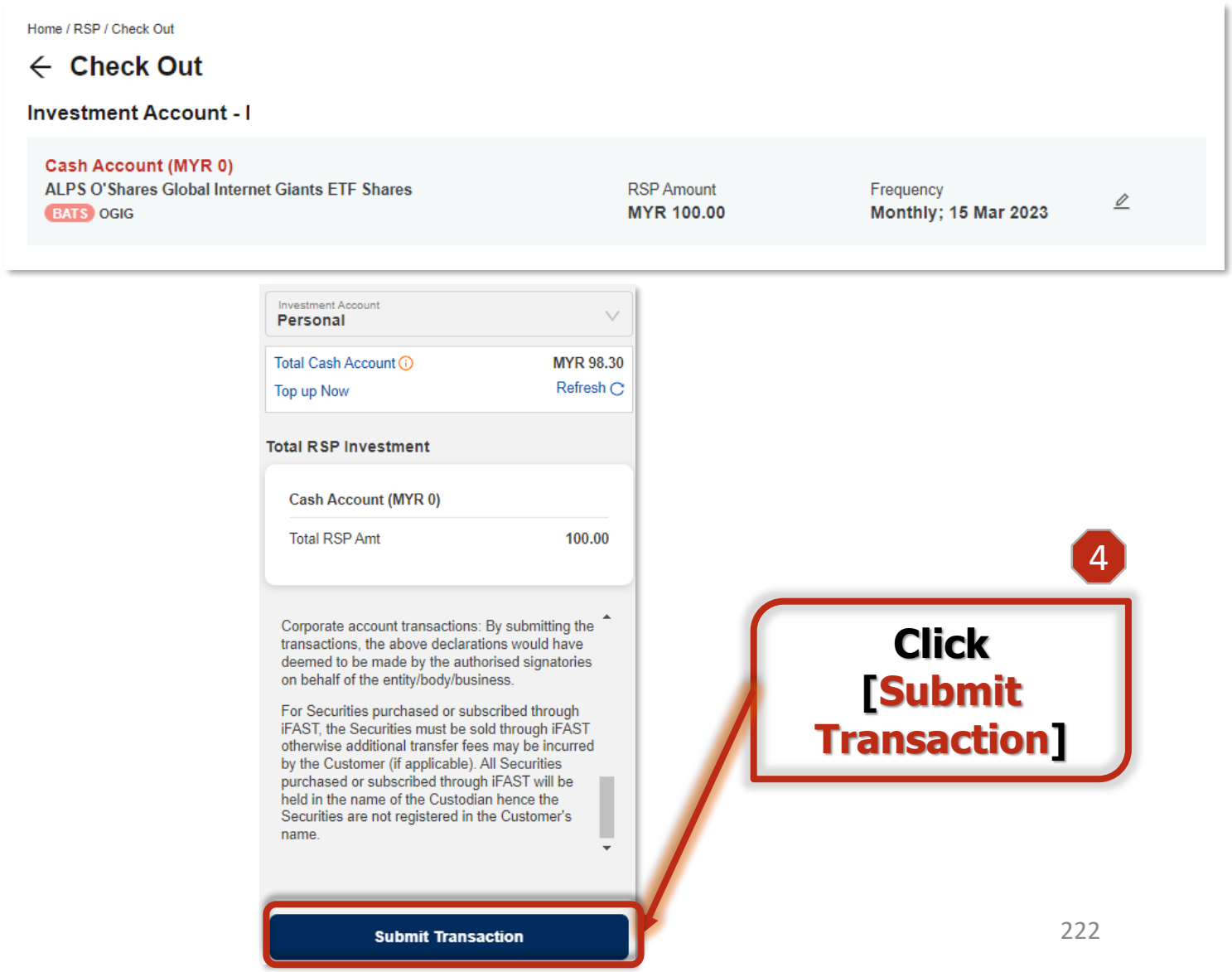
ETF RSP set up on FSMOne

Step 5



1

Click [Proceed To Check Out]

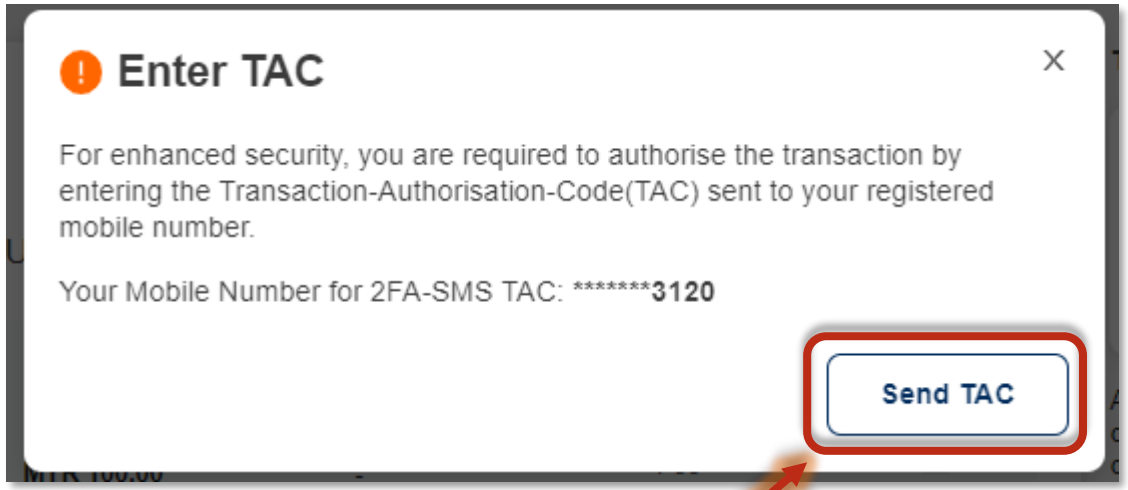


4

Click [Submit Transaction]

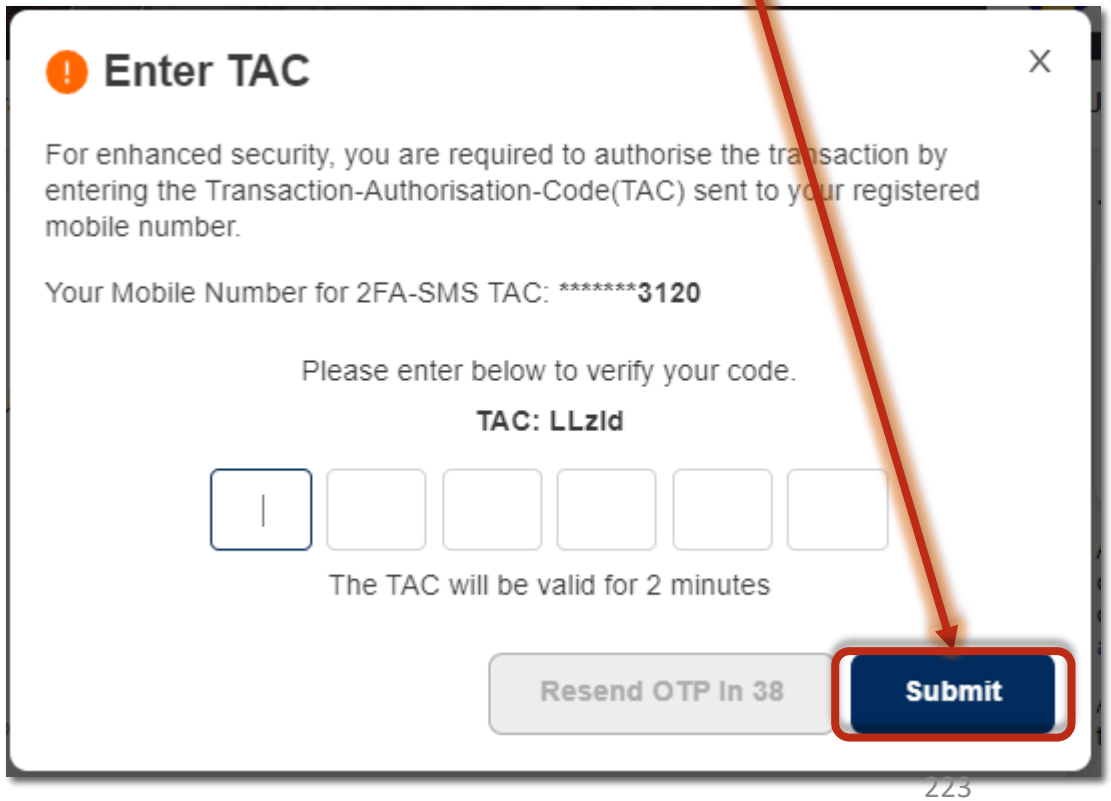
ETF RSP set up on FSMOne

➲ Step 6



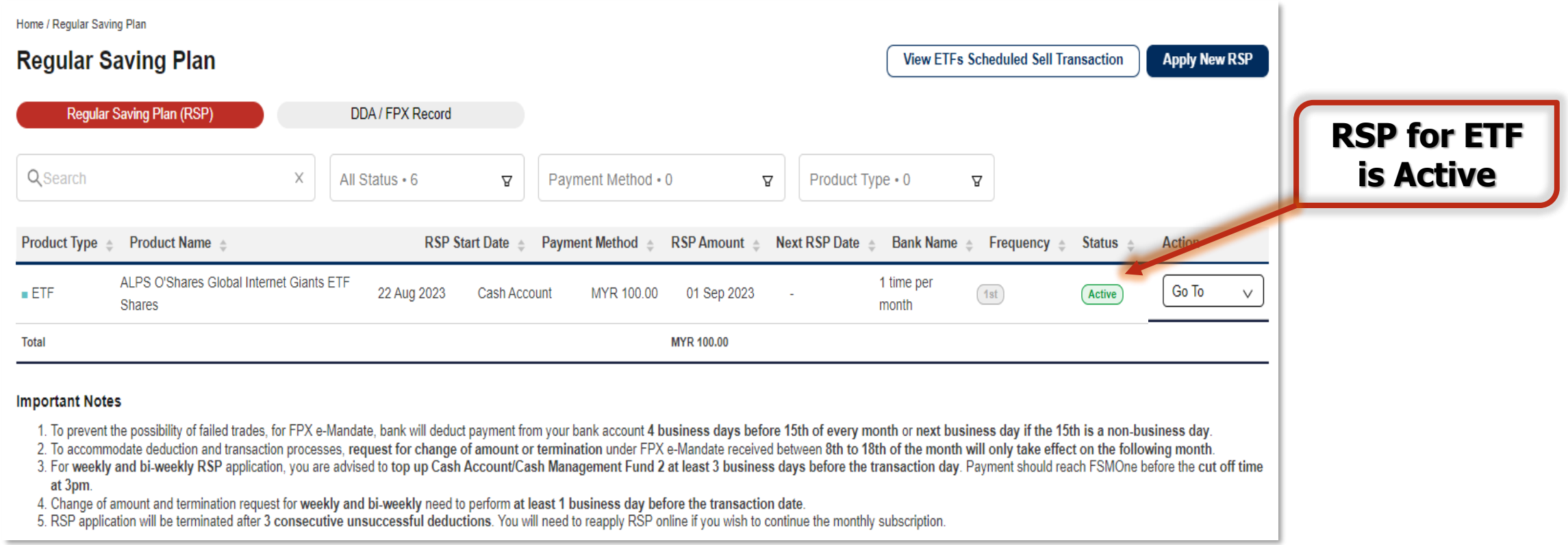
Click [Send TAC]

Enter TAC and Click [Submit]



ETF RSP set up on FSMOne

- **RSP for ETF has been successfully set up**



RSP for ETF is Active

FSMOne step by step guide

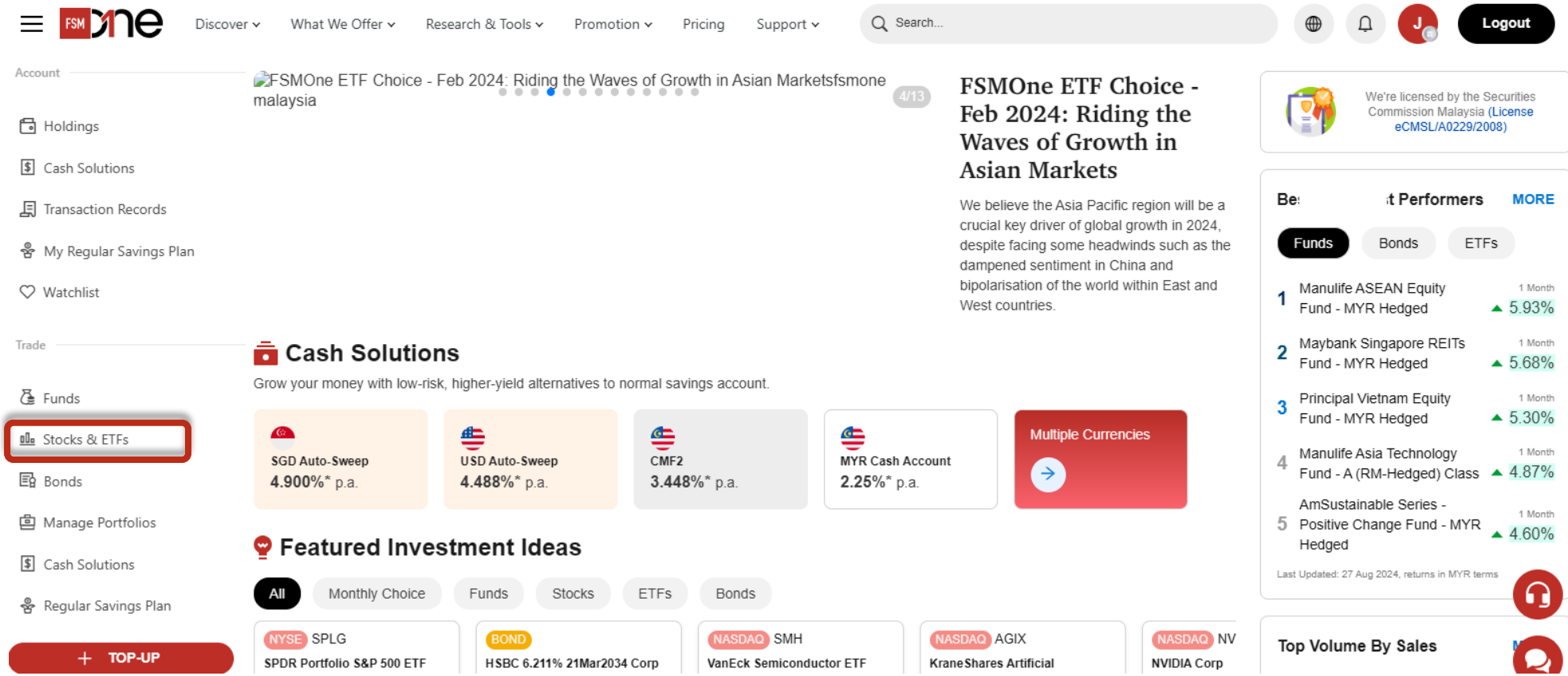
Exchange Traded Fund (ETF)

Sell

Selling ETFs on FSMOne

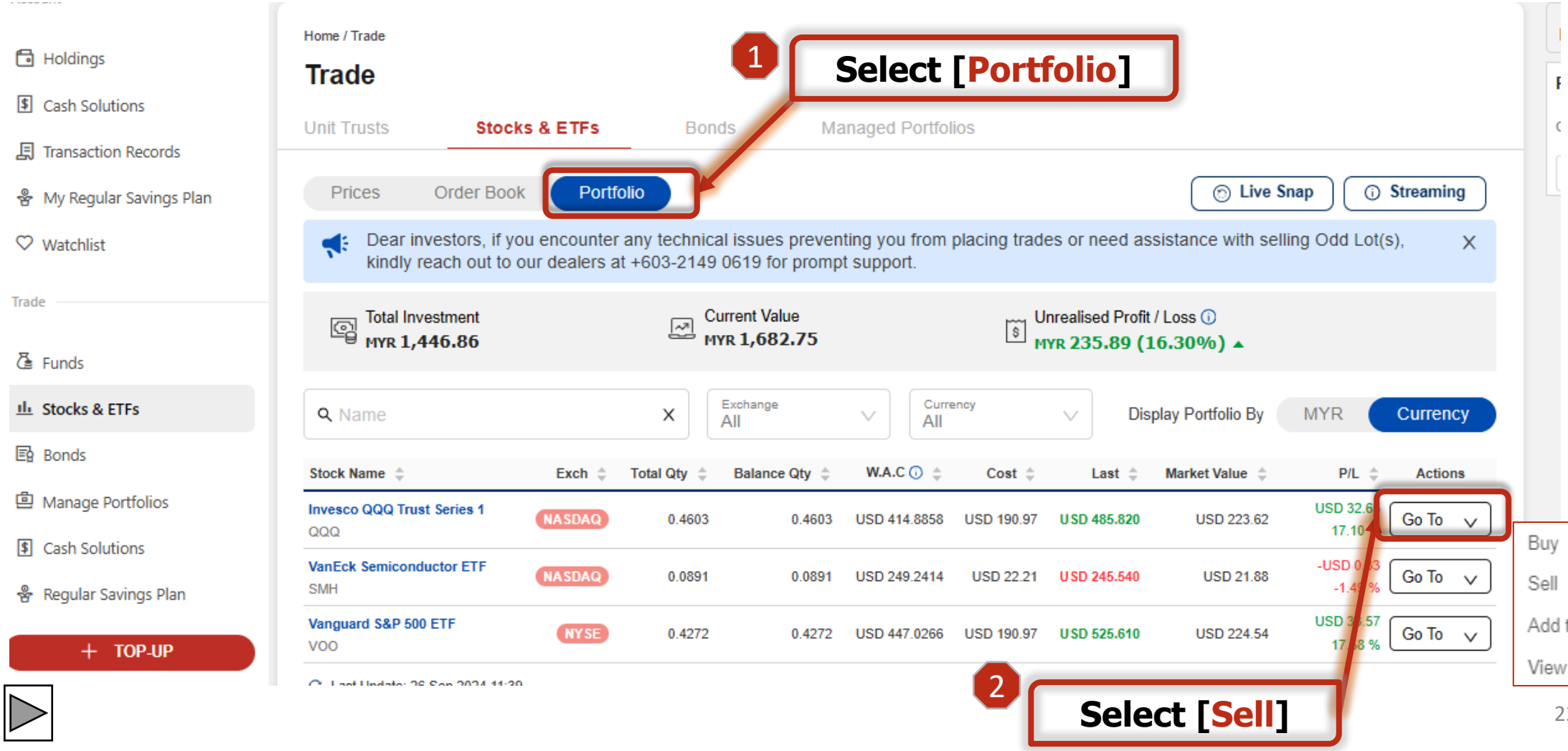
➲ Step 1

- **Click on [Stocks & ETFs]**



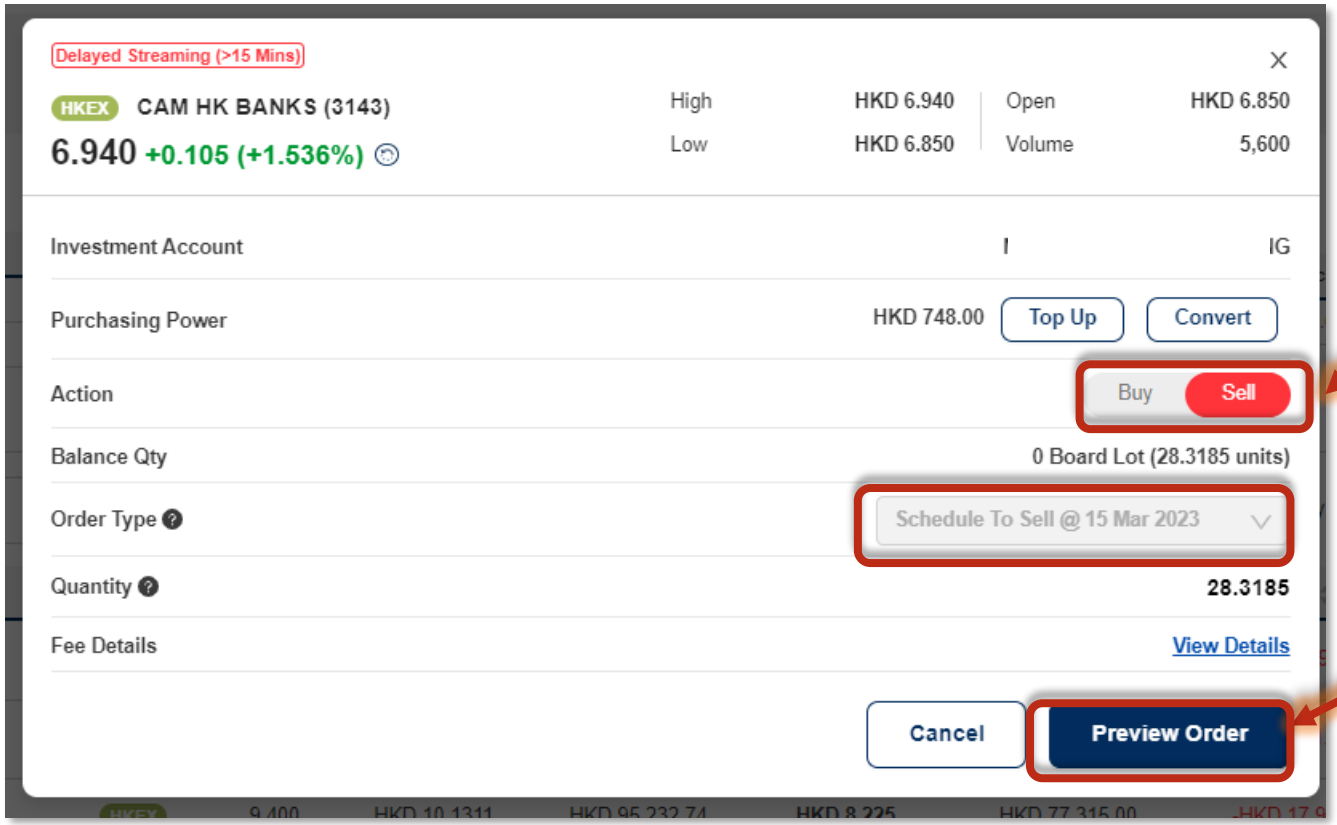
Selling ETFs on FSMOne

Step 2



Selling ETFs on FSMOne

Step 3



1

Make sure toggled to [Sell]

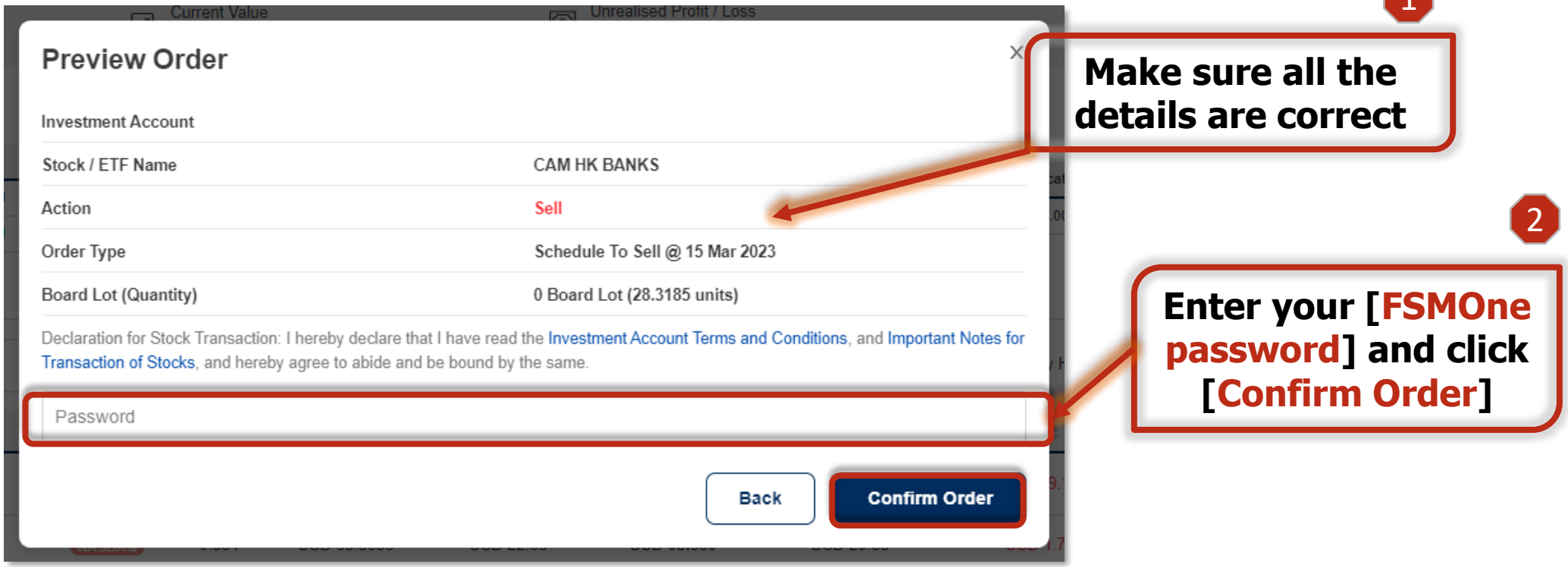
2

Click [Preview Order]

(Schedule Sell will help you sell off your fractional units on every 15th of the month)

Selling ETFs on FSMOne

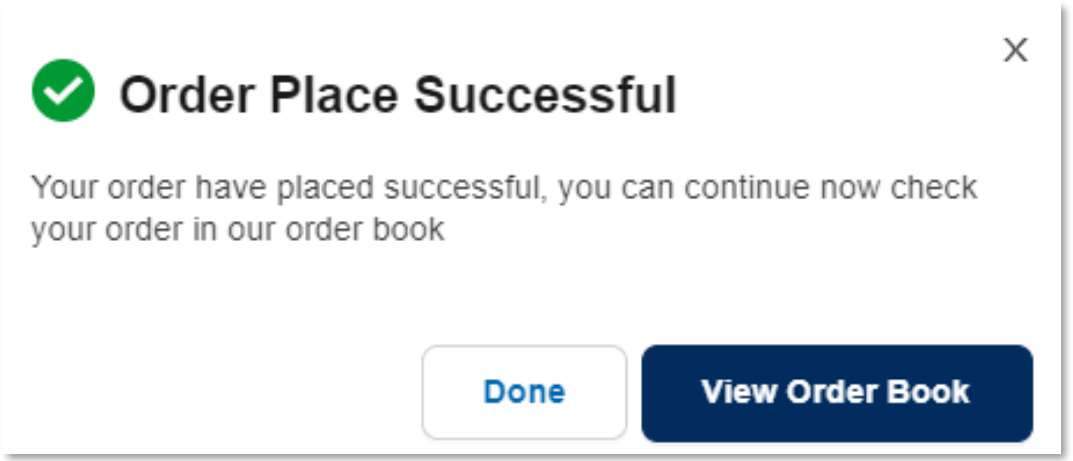
Step 4



Selling ETFs on FSMOne

Step 5

Sell order has been placed successfully



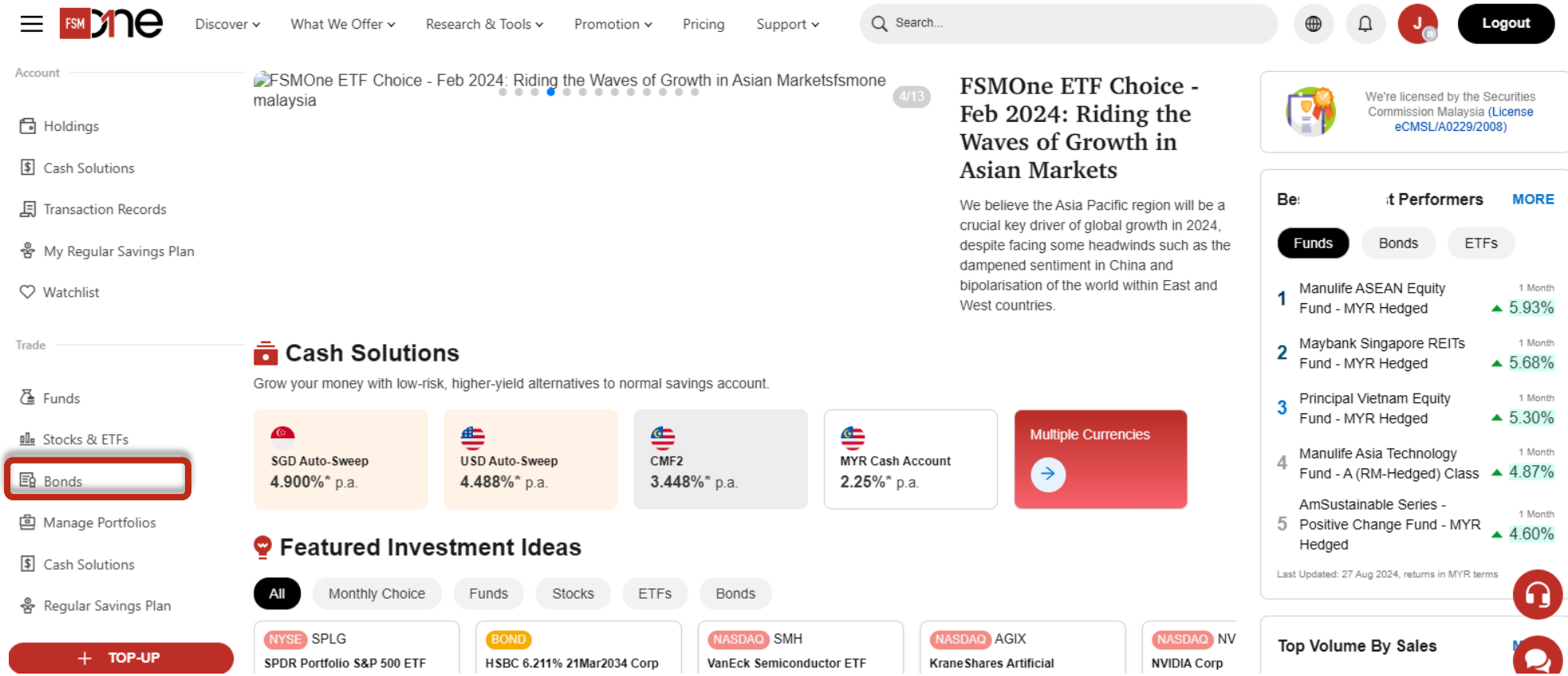
FSMOne step by step guide

Bonds - Buy

Buying ETFs on FSMOne

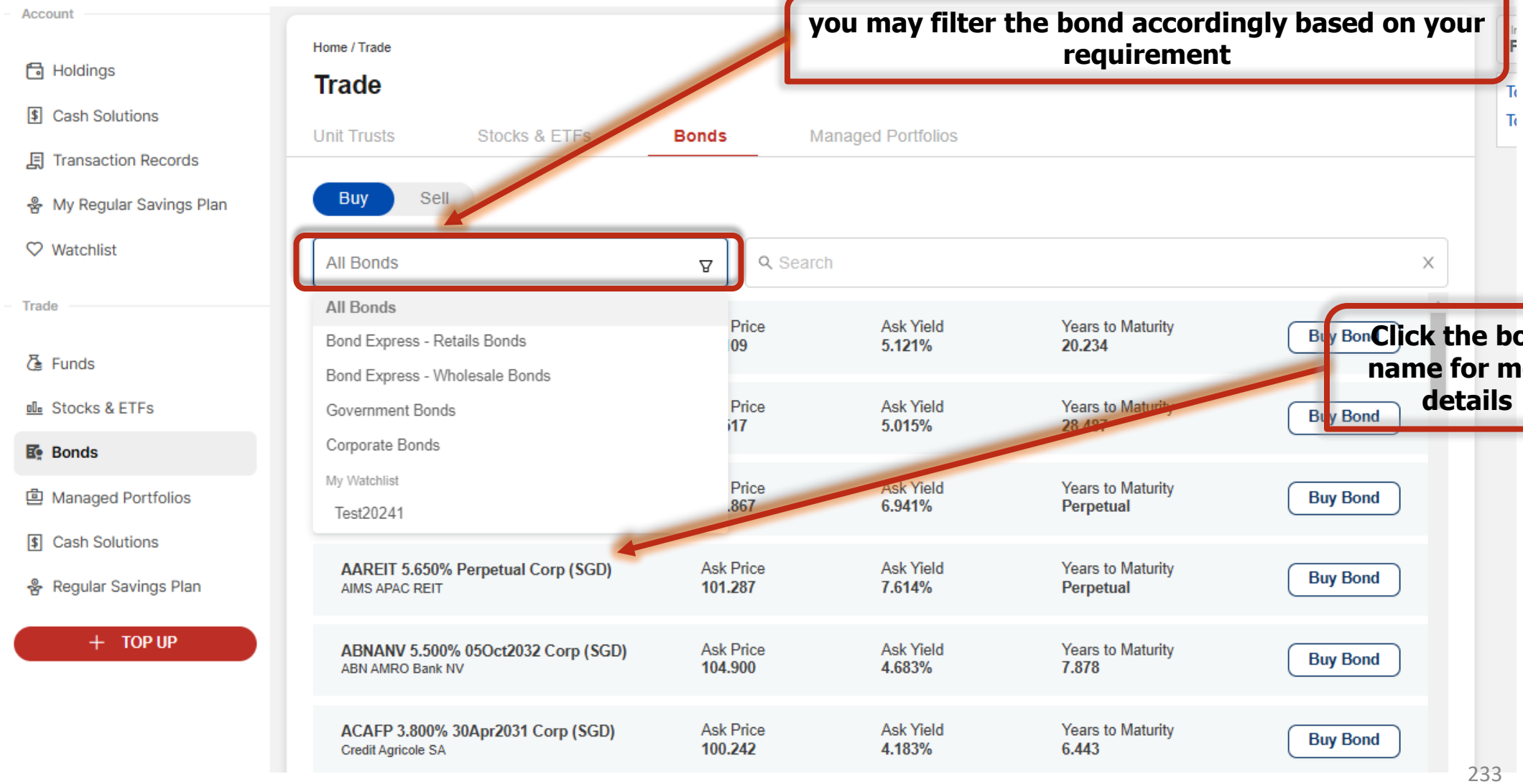
Step 1

- Click on [Bonds]



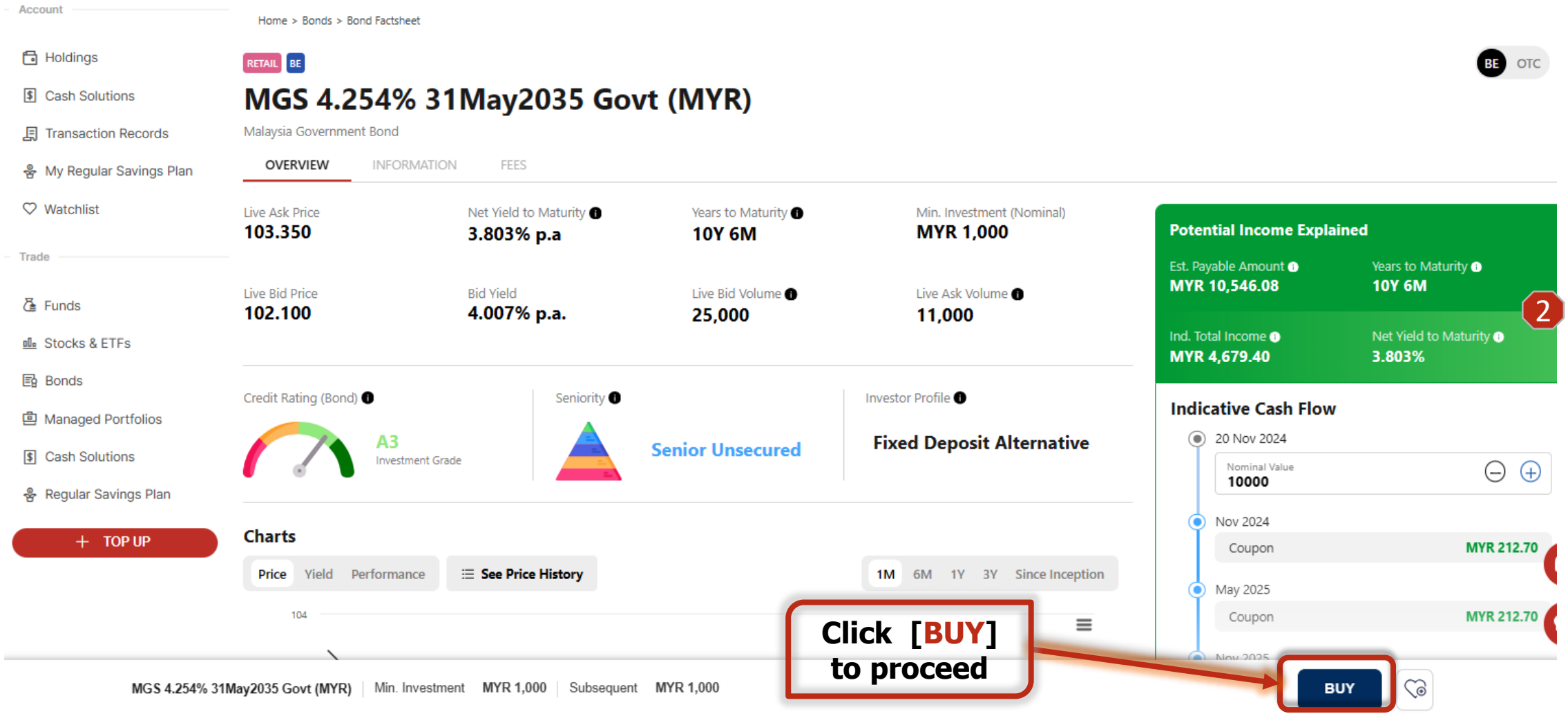
Buying bonds on FSMOne

Step 2



Buying bonds on FSMOne

Step 3



Buying bonds on FSMOne

➲ Step 4

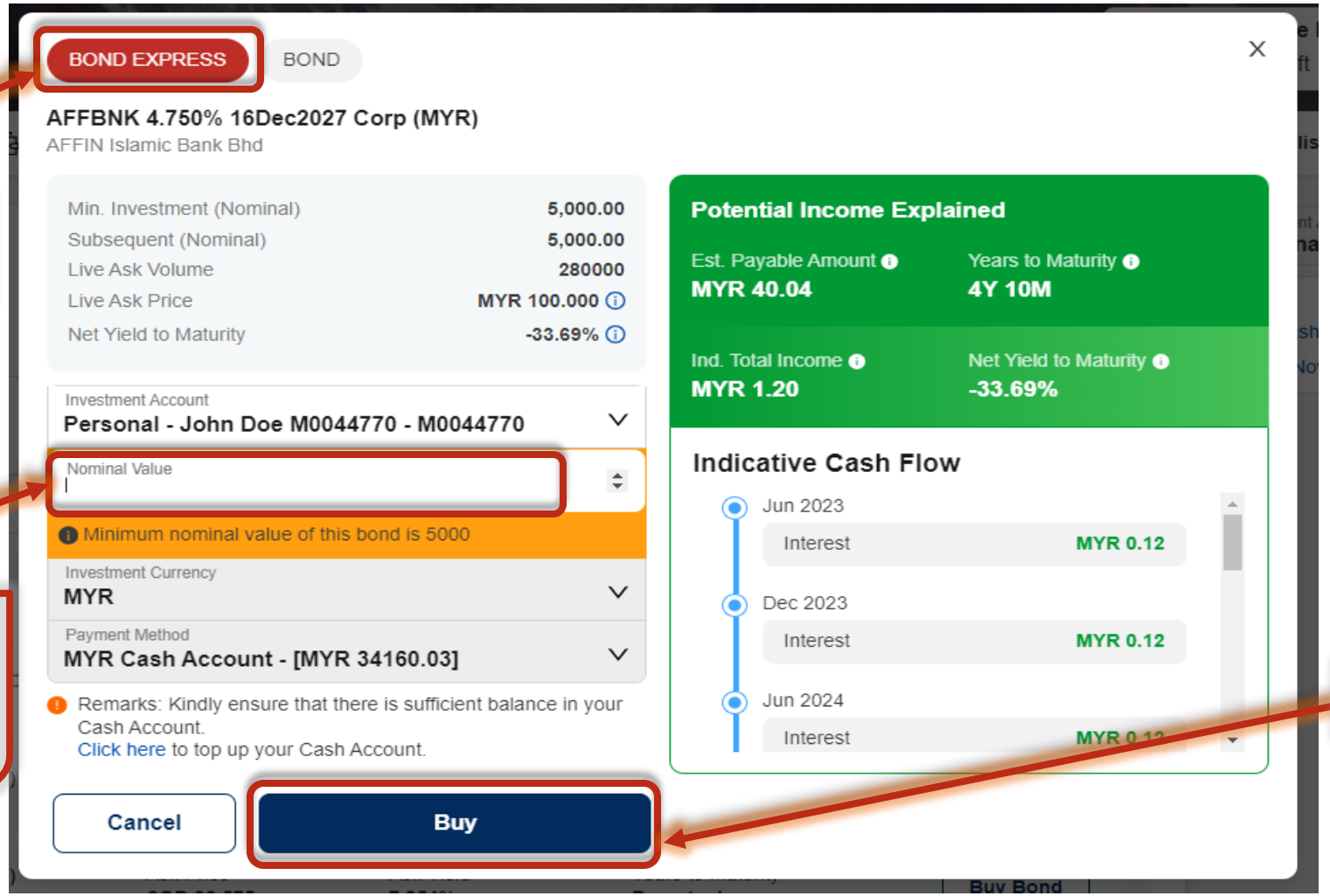
- Order pad for [Bond Express]

1

Buy a smaller lot with [BOND EXPRESS]

2

Key in the preferred nominal value and confirm the minimum nominal value of the bond



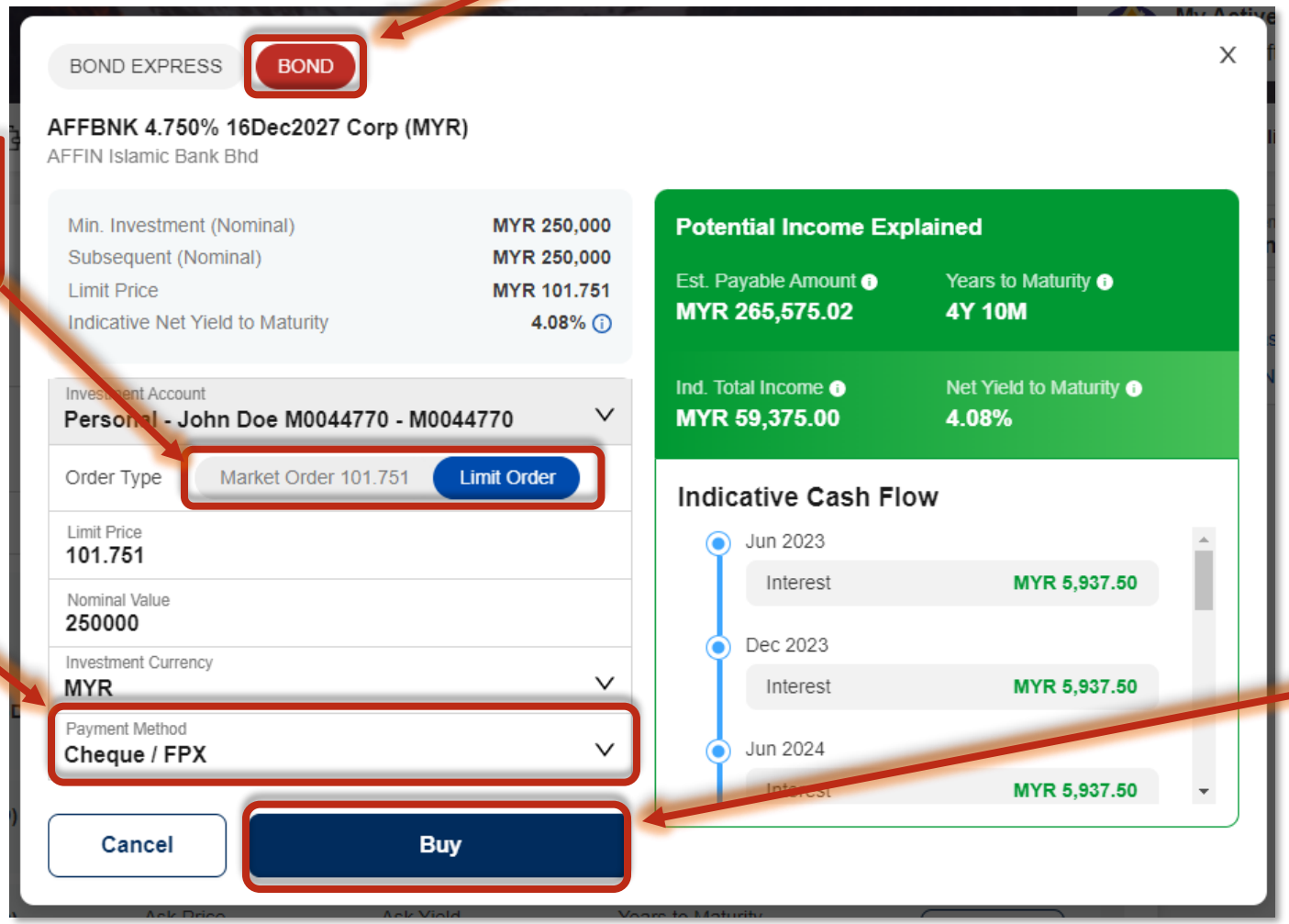
3

Click [Buy]

Buying bonds on FSMOne

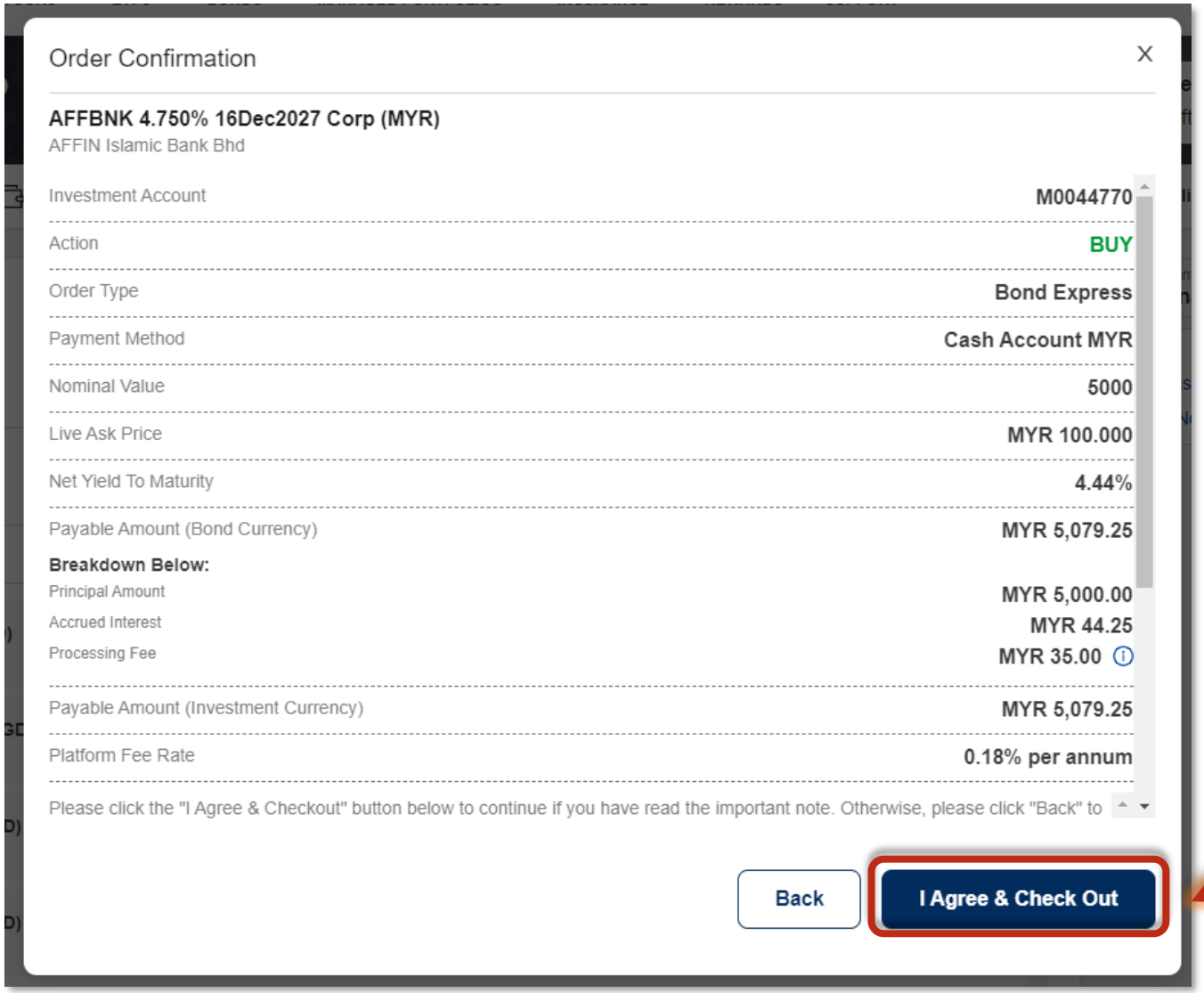
➲ Step 5

- Order pad for [Bond]



Buying bonds on FSMOne

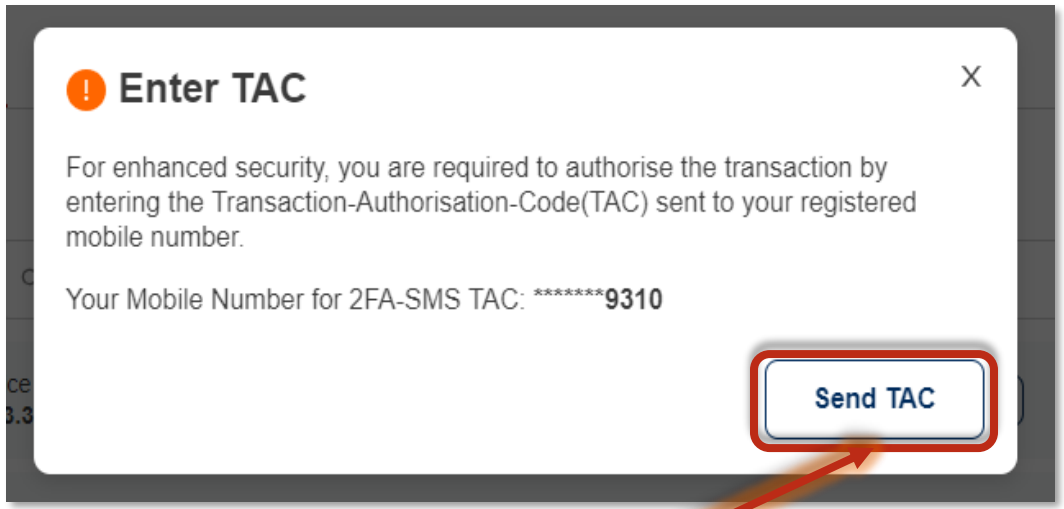
- **Step 6**



Click [I Agree & Check Out]

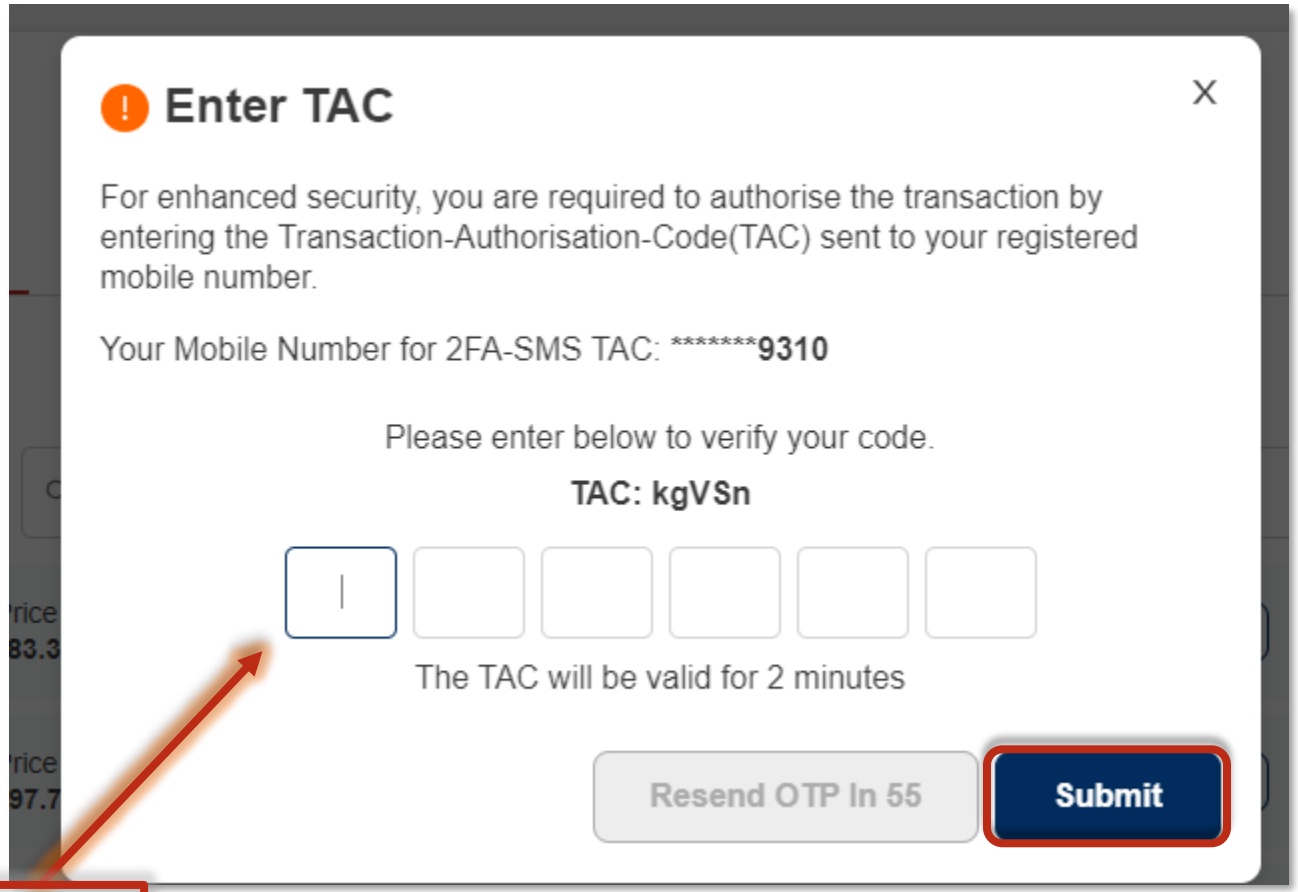
Buying bonds on FSMOne

Step 7



1

Click [Send TAC] to your registration mobile number



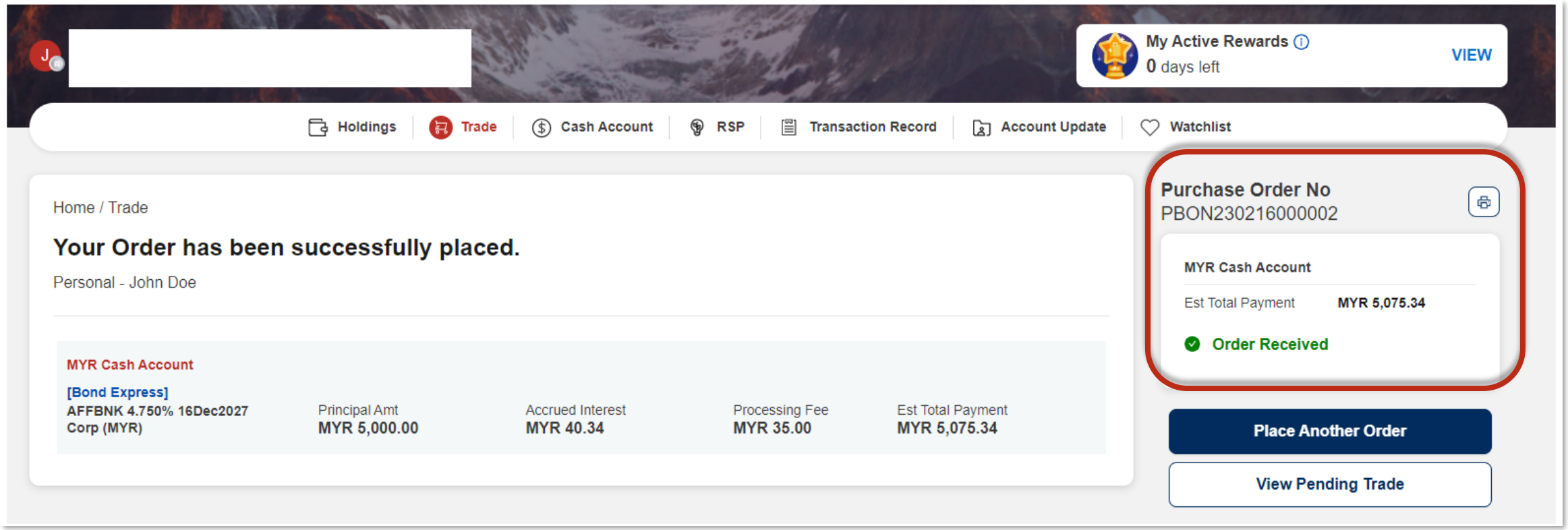
2

Enter TAC and click [Submit]

Buying bonds on FSMOne

Step 8

- Successfully placed the buy order.



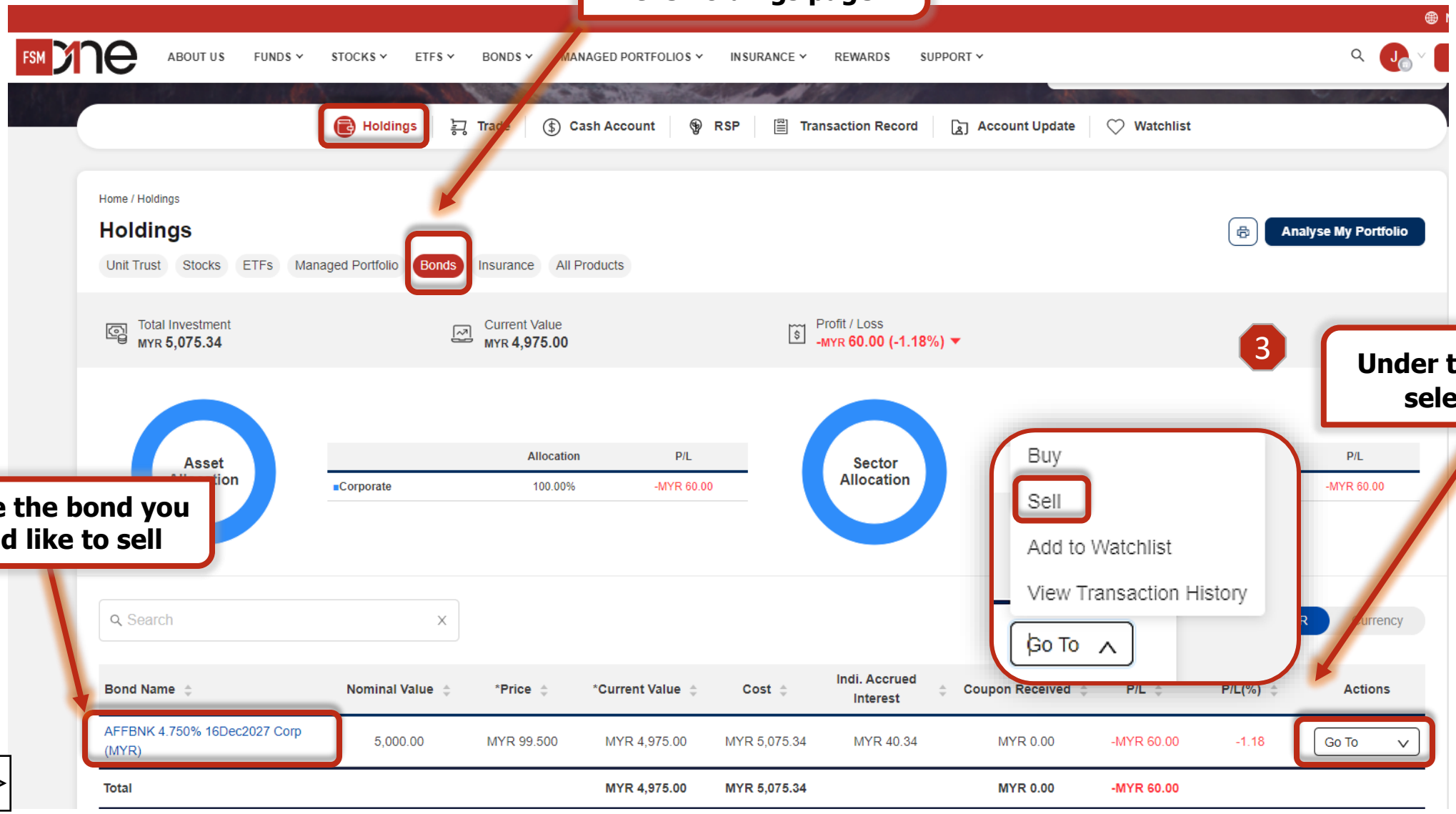
FSMOne step by step guide

Bonds - Sell

Selling Bonds on FSMOne

Step 2

1 Select [Bonds] under the holdings page



2 Choose the bond you would like to sell

3 Under the [Actions] select [Sell]

Selling Bonds on FSMOne

➲ Step 3

- Order pad for [Bond Express]

1

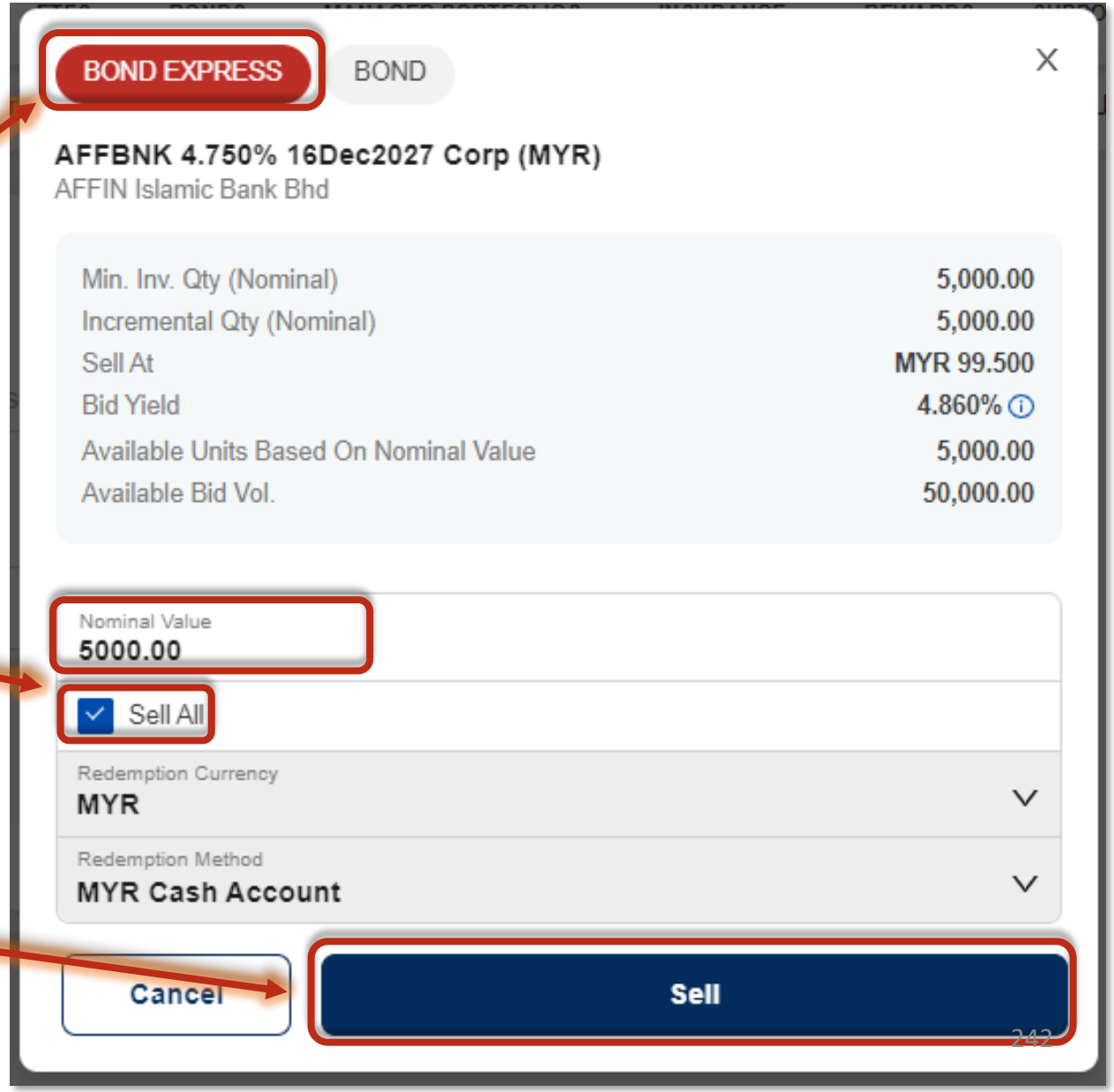
Sell smaller lot in [BOND EXPRESS]

2

Key in the preferred nominal value or minimum nominal value. Otherwise may tick [Sell All]

3

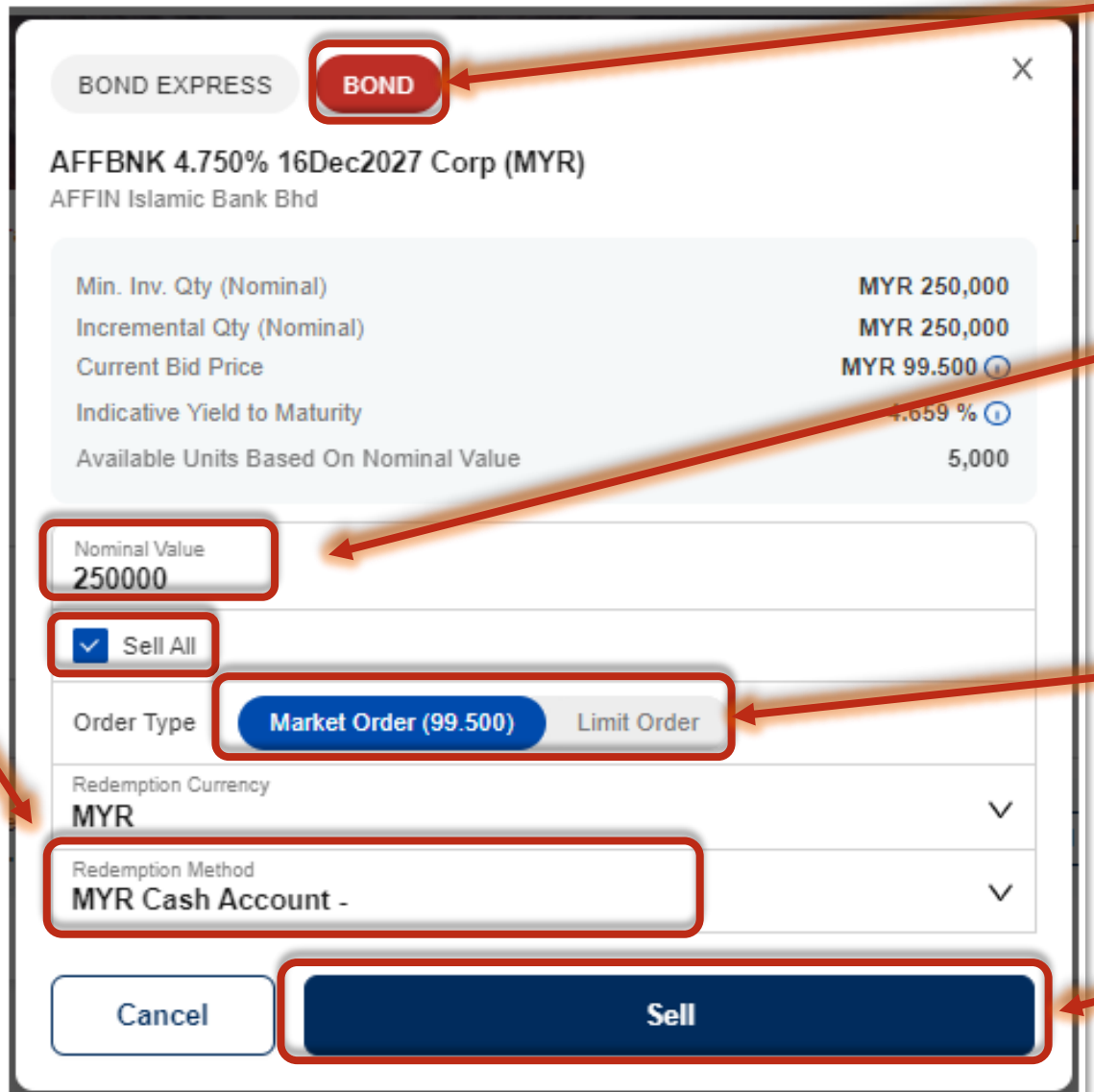
Click [Sell]

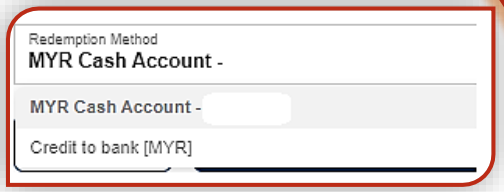


Selling Bonds on FSMOne

➲ Step 3

- Order pad for [Bond]





1 **Sell full lot in [BOND]**

2 **Key in the preferred nominal value or minimum nominal value. Otherwise may tick [Sell All]**

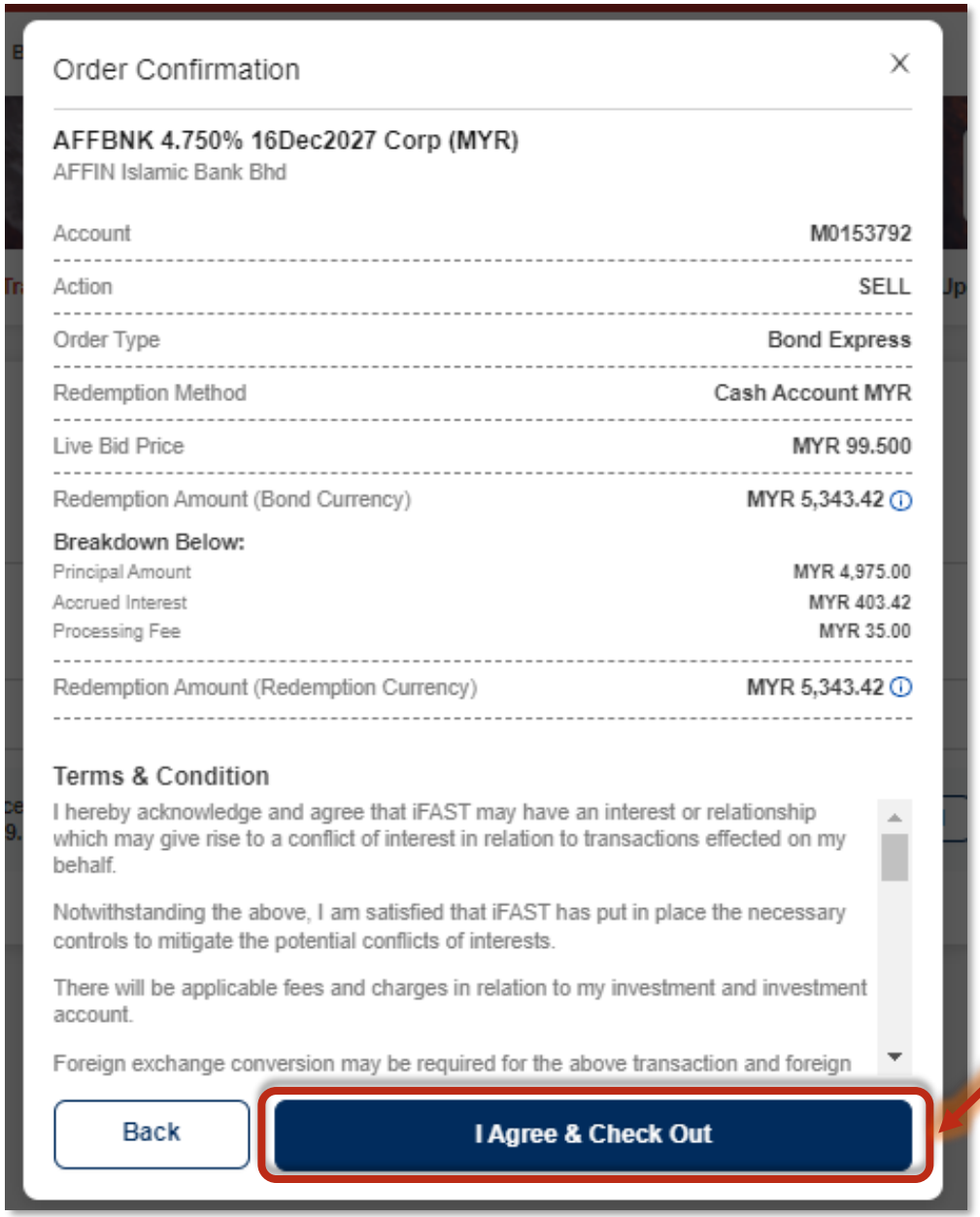
3 **Select the order type based on your preference**

4 **Select your preferred Redemption method**

5 **Click [Sell]**

Selling Bonds on FSMOne

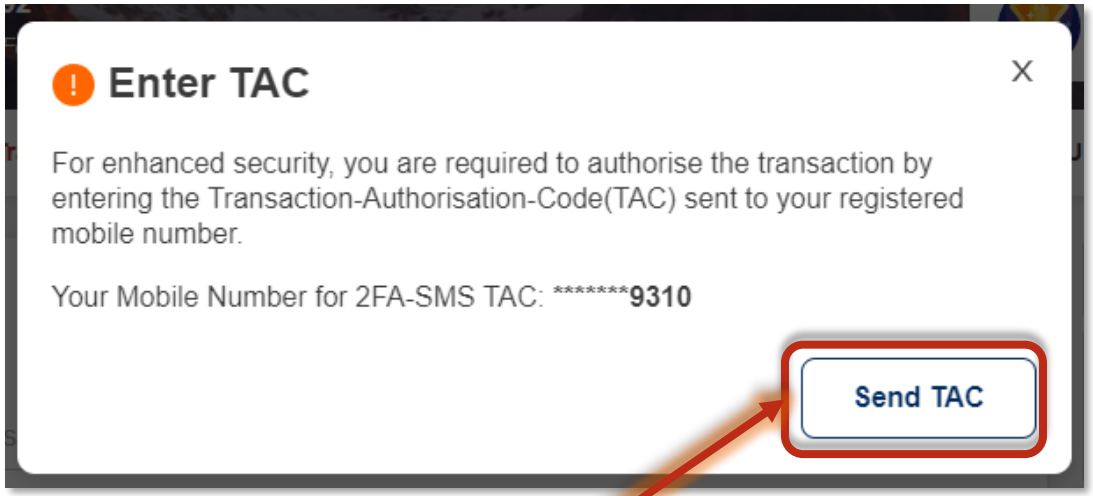
➲ Step 4



Click [I Agree & Check Out]

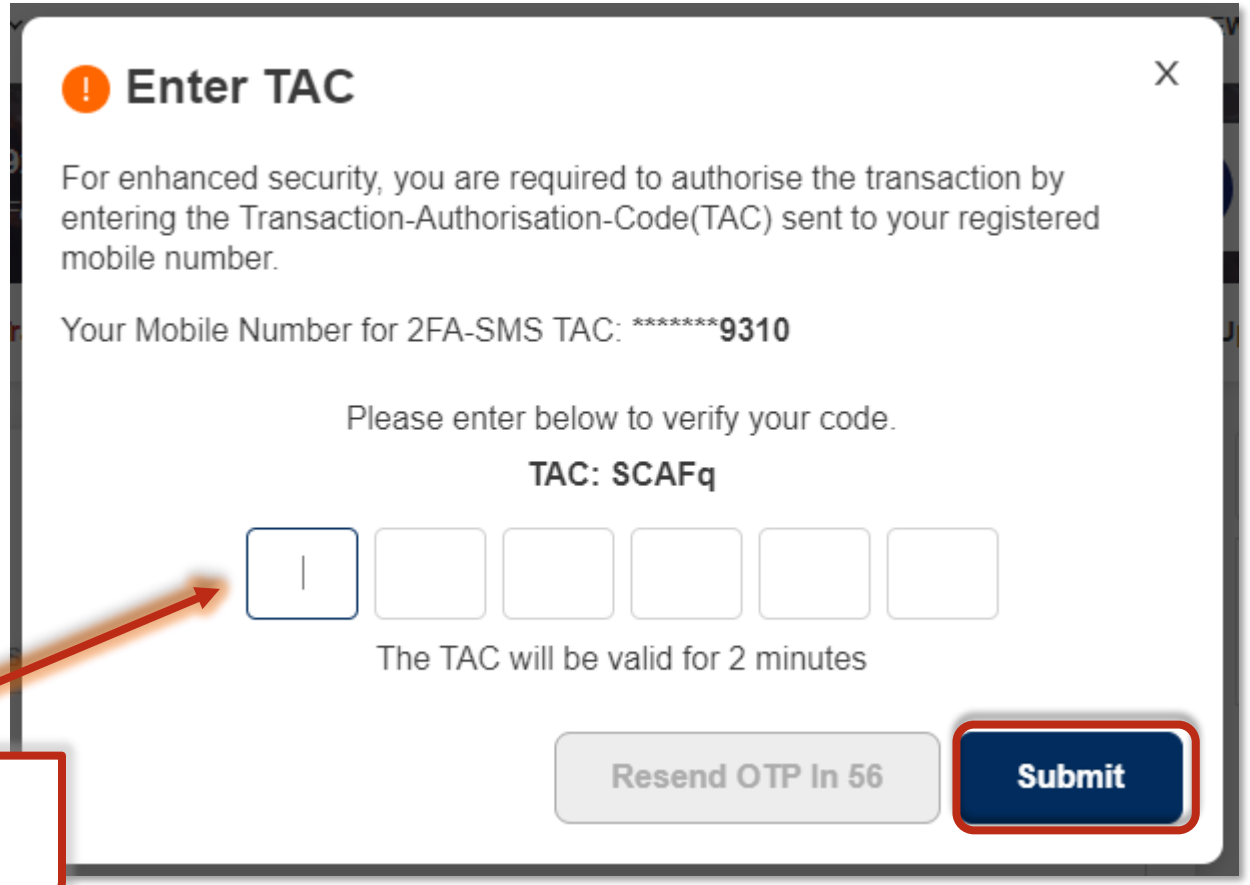
Selling Bonds on FSMOne

➲ Step 5



1

Click [Send TAC] to your registration mobile number



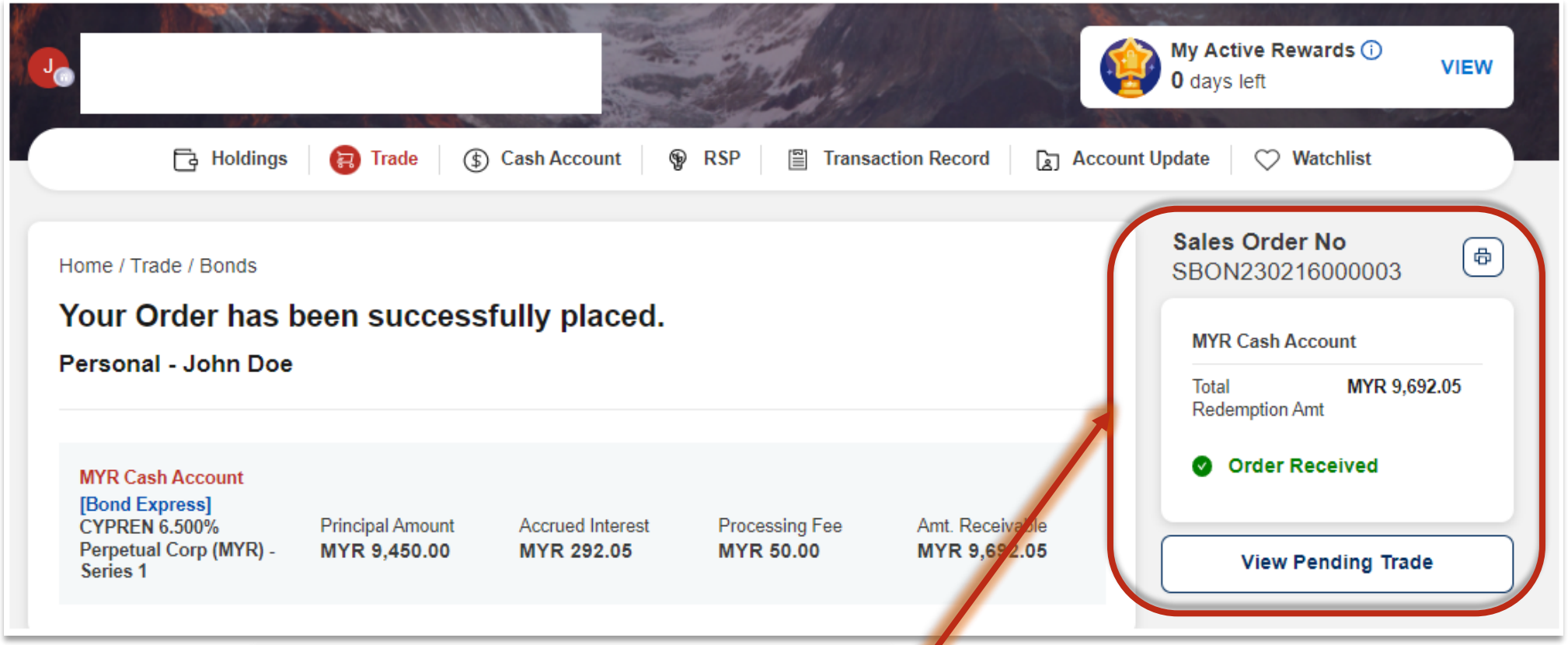
2

Enter TAC and click [Submit]

Selling Bonds on FSMOne

➲ Step 6

- Successfully placed the sell order.



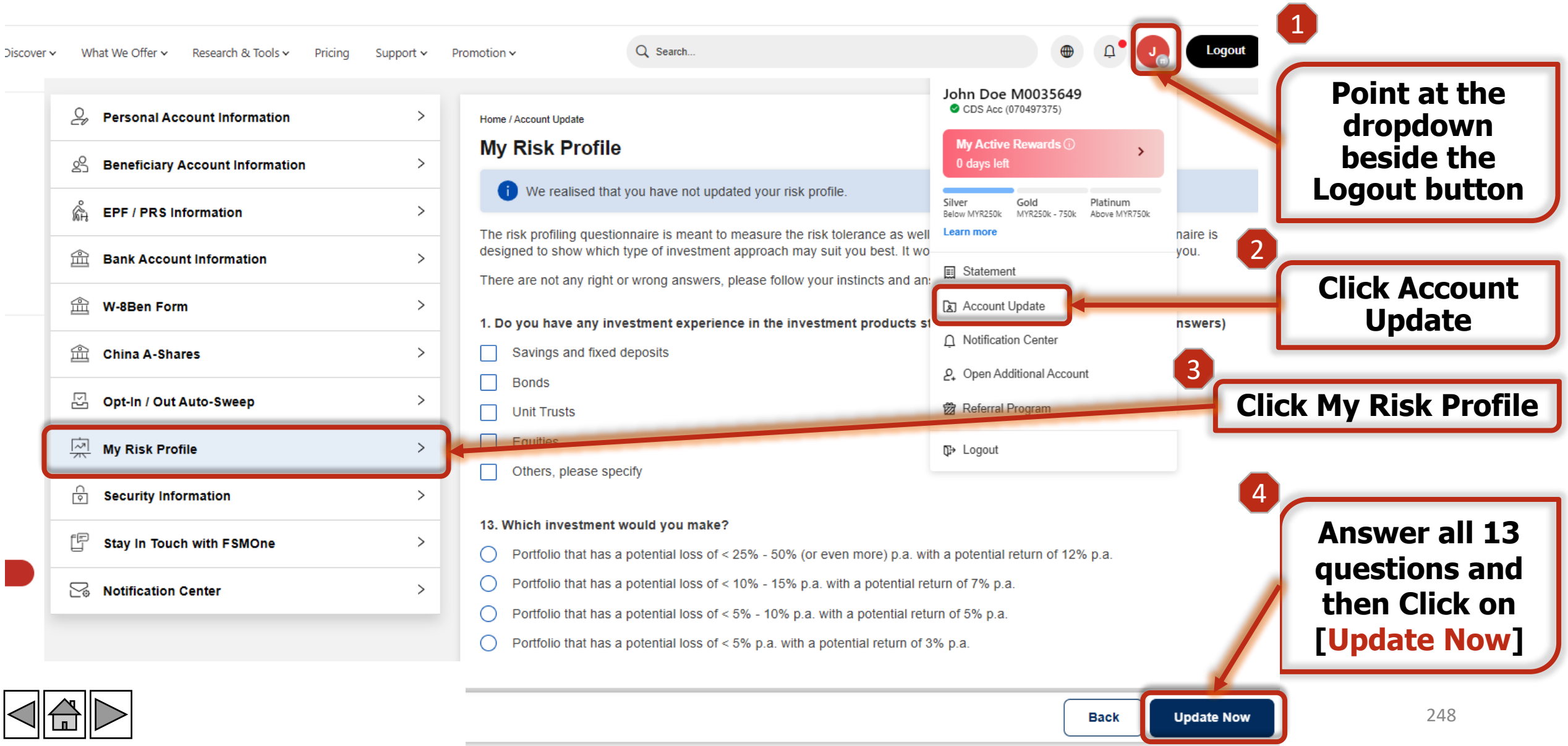
Click [View Pending Trade] to check the order status

FSMOne step by step guide

Risk Profile

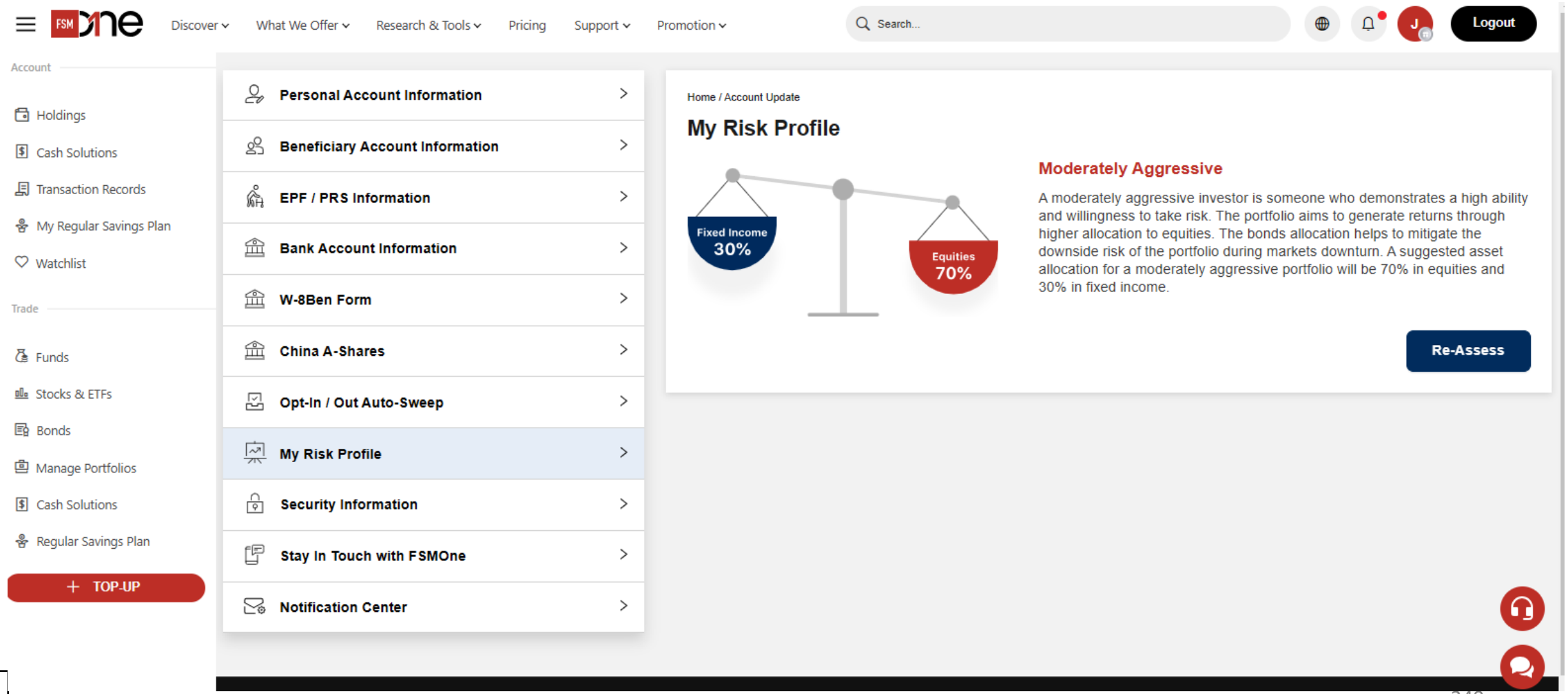
Update

Updating Risk Profile on FSMOne



Updating Risk Profile on FSMOne

- Done



FSMOne step by step guide

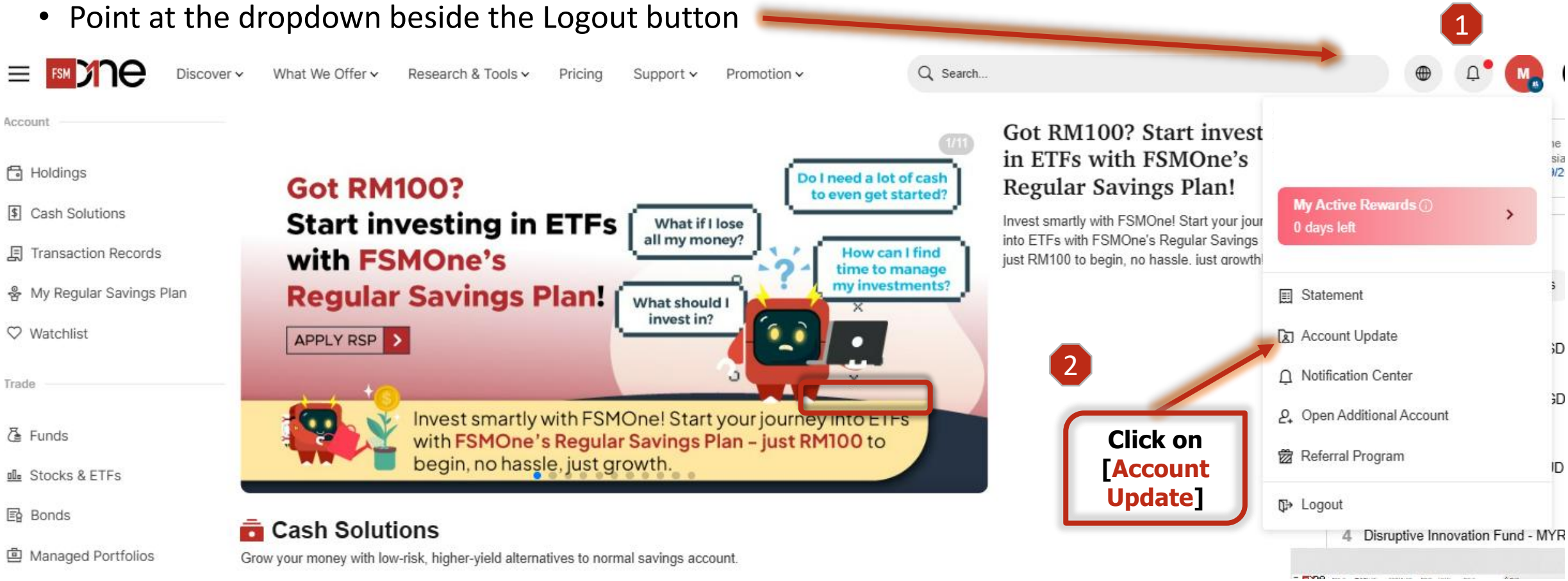
Bank Account - Update



Updating bank account details on FSMOne

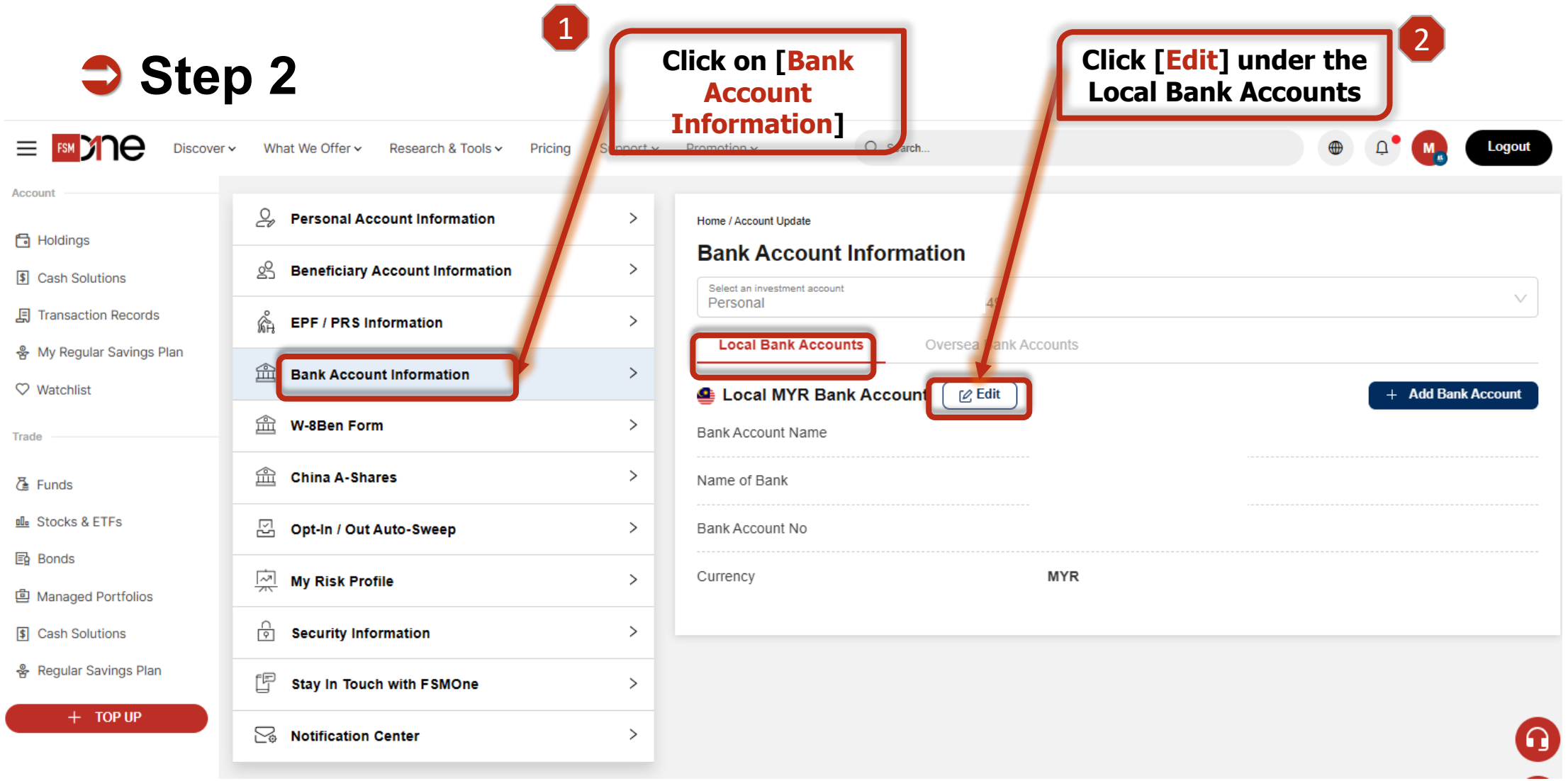
➲ Step 1

- Point at the dropdown beside the Logout button



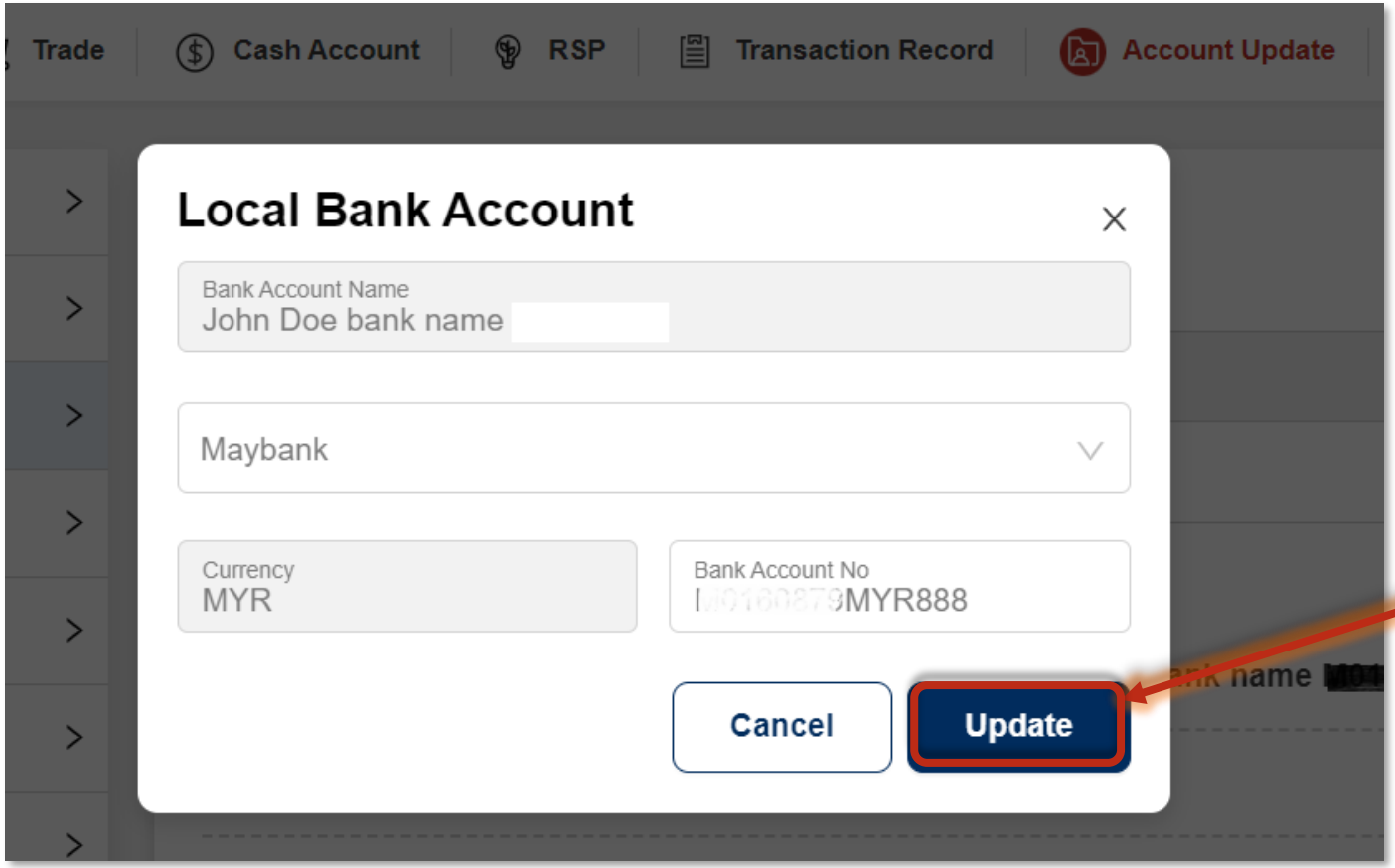
Updating bank account details on FSMOne

➲ Step 2



Updating bank account details on FSMOne

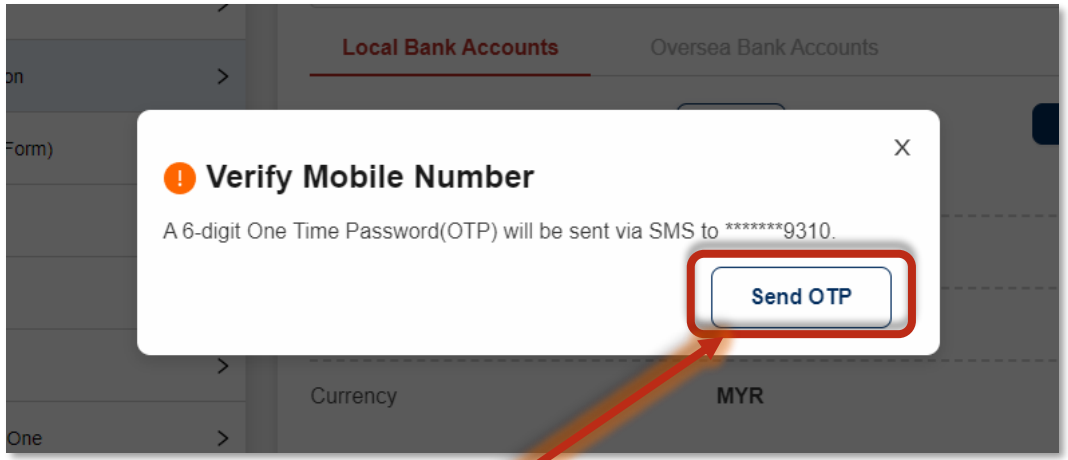
- **Step 3**



Fill in the latest bank account details and click [Update]

Updating bank account details on FSMOne

Step 4

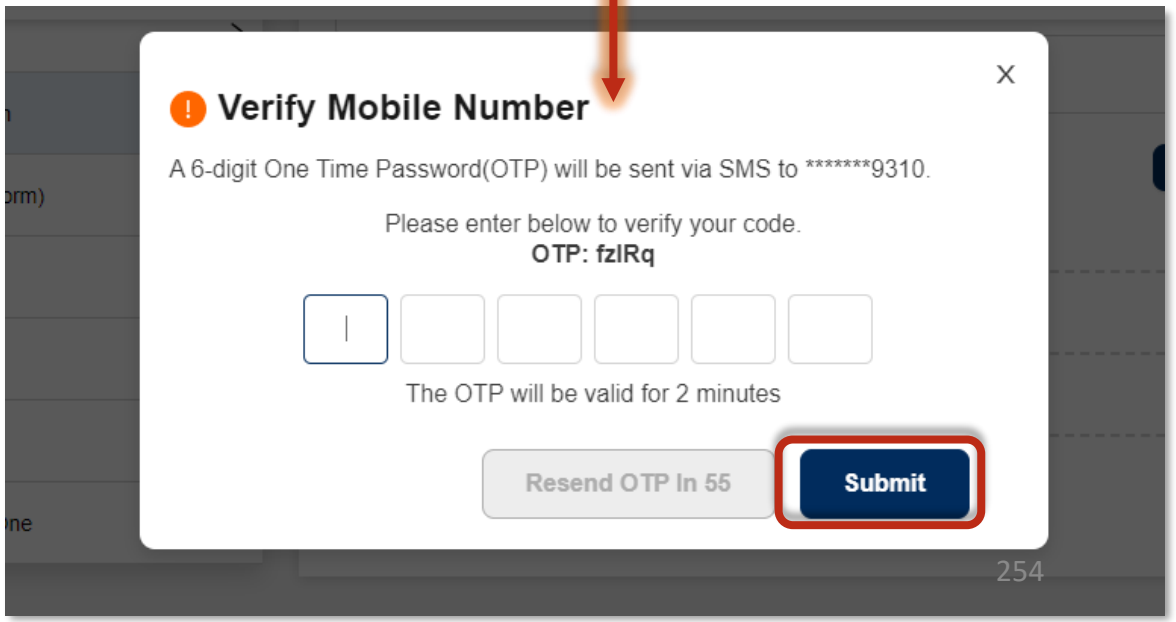


1

Click [Send OTP] to your registered mobile number

2

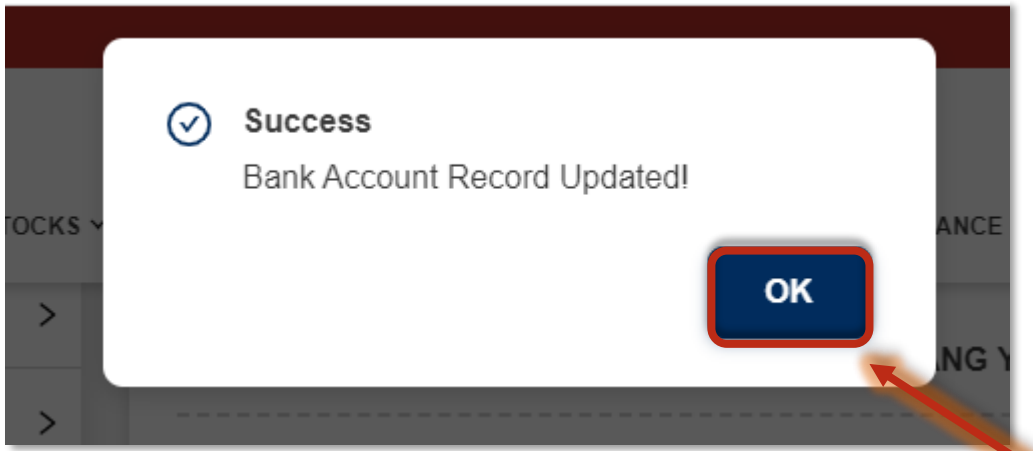
Enter OTP and click [Submit]



Updating bank account details on FSMOne

Step 5

- Latest bank account updated.



Click [OK] to view the latest update

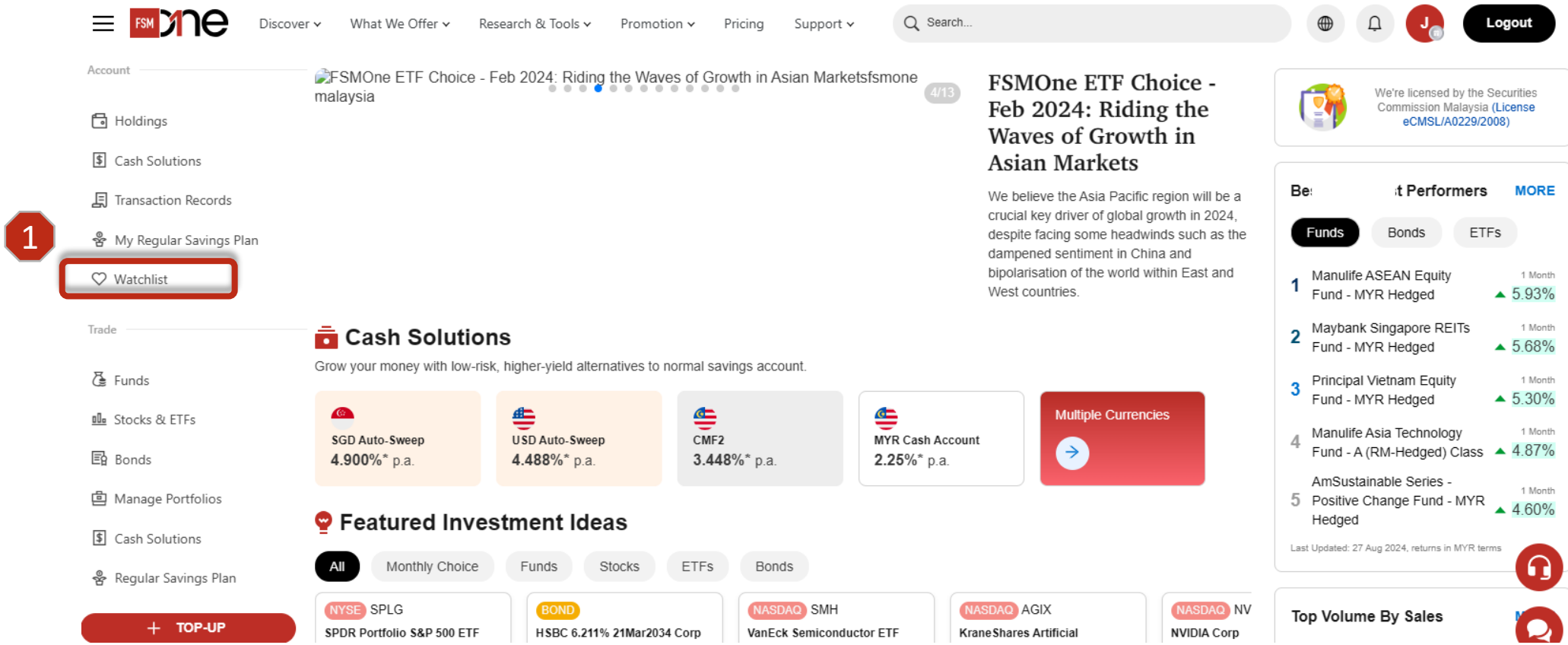
FSMOne step by step guide

Create a Watchlist

Create a Watchlist on FSMOne

Step 1

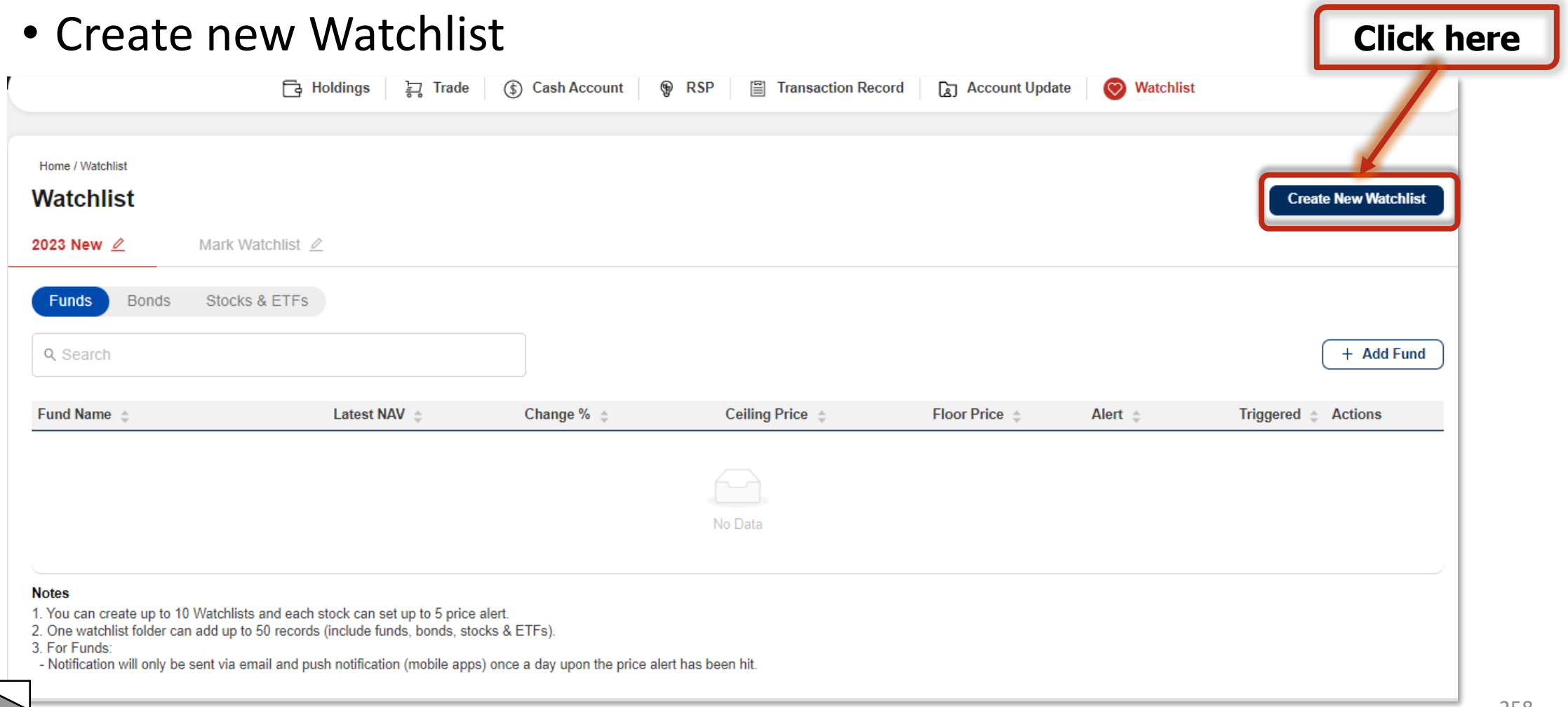
- **Click on [Watchlist]**



Create a Watchlist on FSMOne

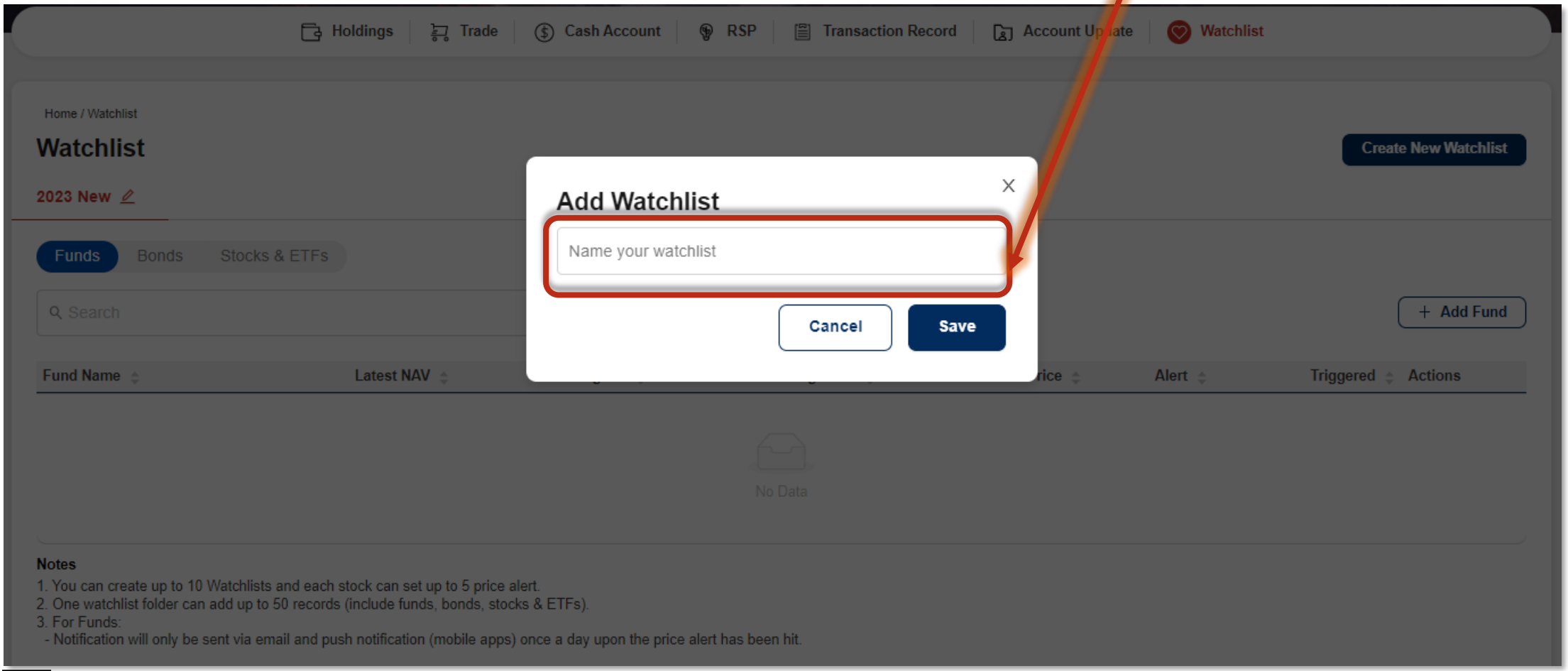
Step 2

- Create new Watchlist



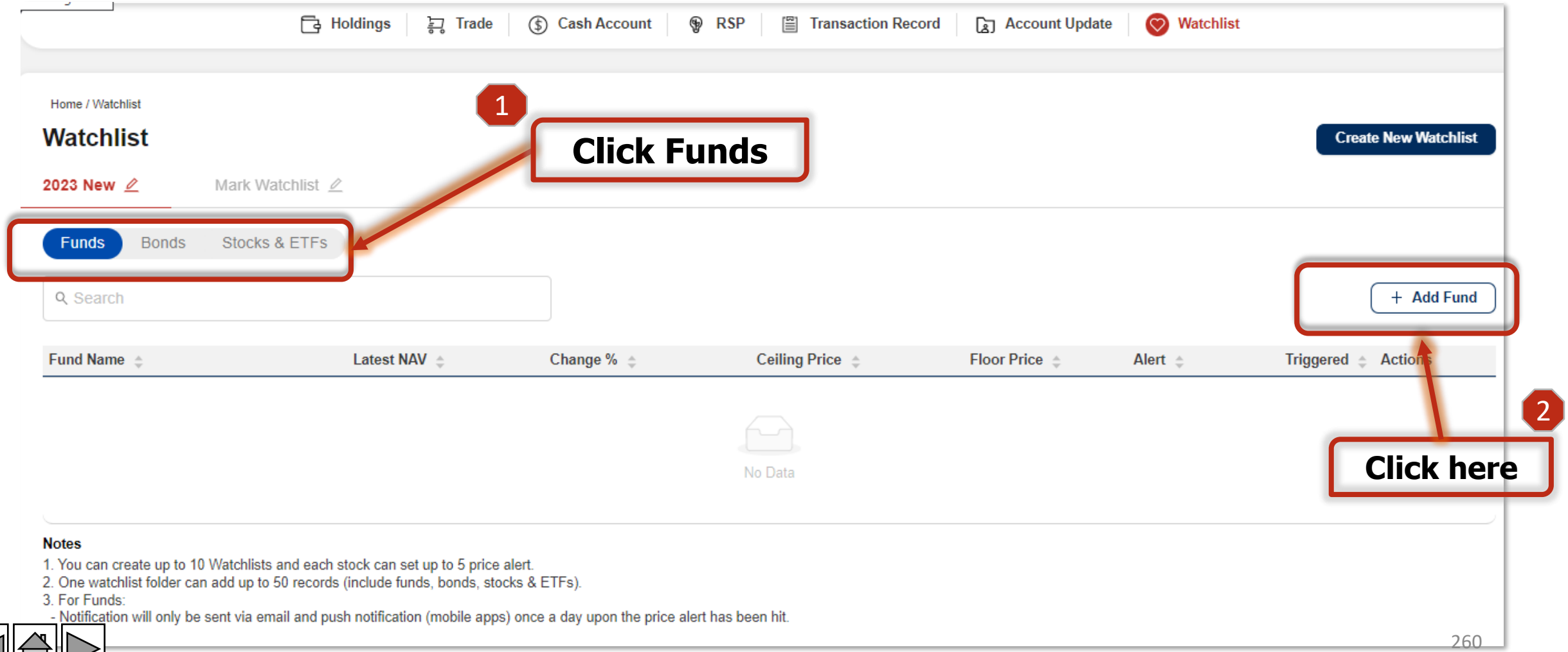
Set Watchlist on FSMOne

➲ Step 3 - Name your watchlist



Create a Watchlist on FSMOne

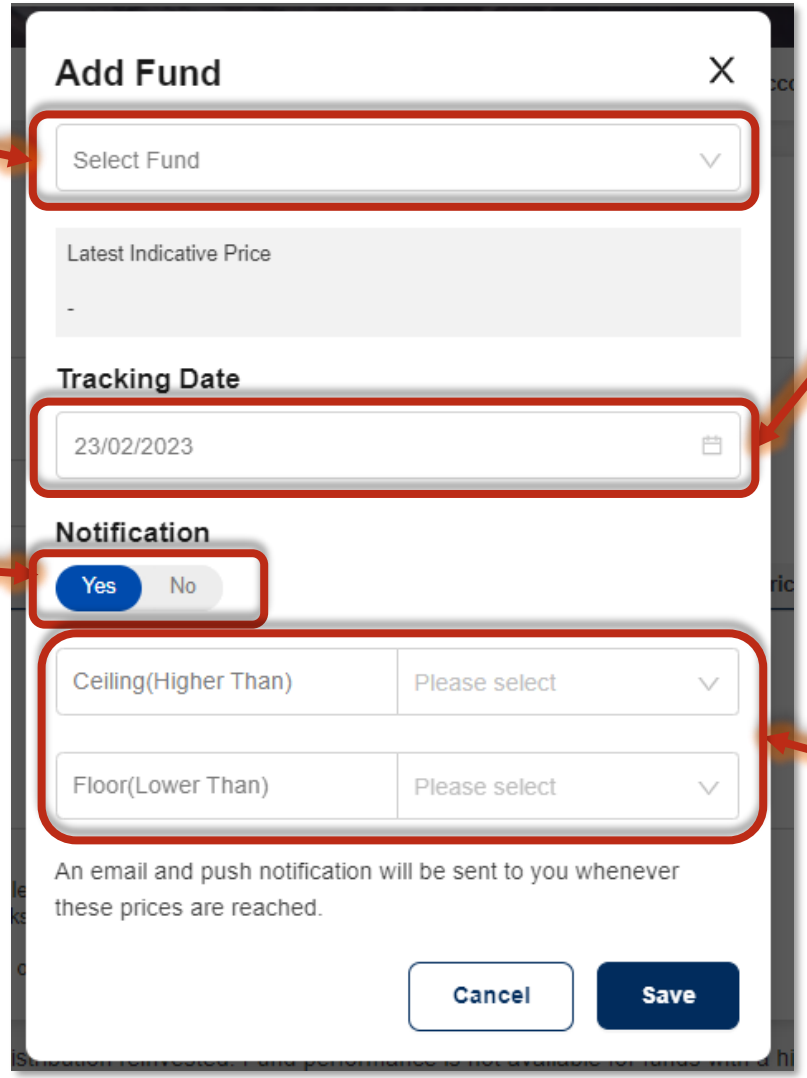
Step 4 - UNIT TRUST FUND - Add Fund



Create a Watchlist on FSMOne

Step 5 - Select Fund and details

1 **Select Fund**



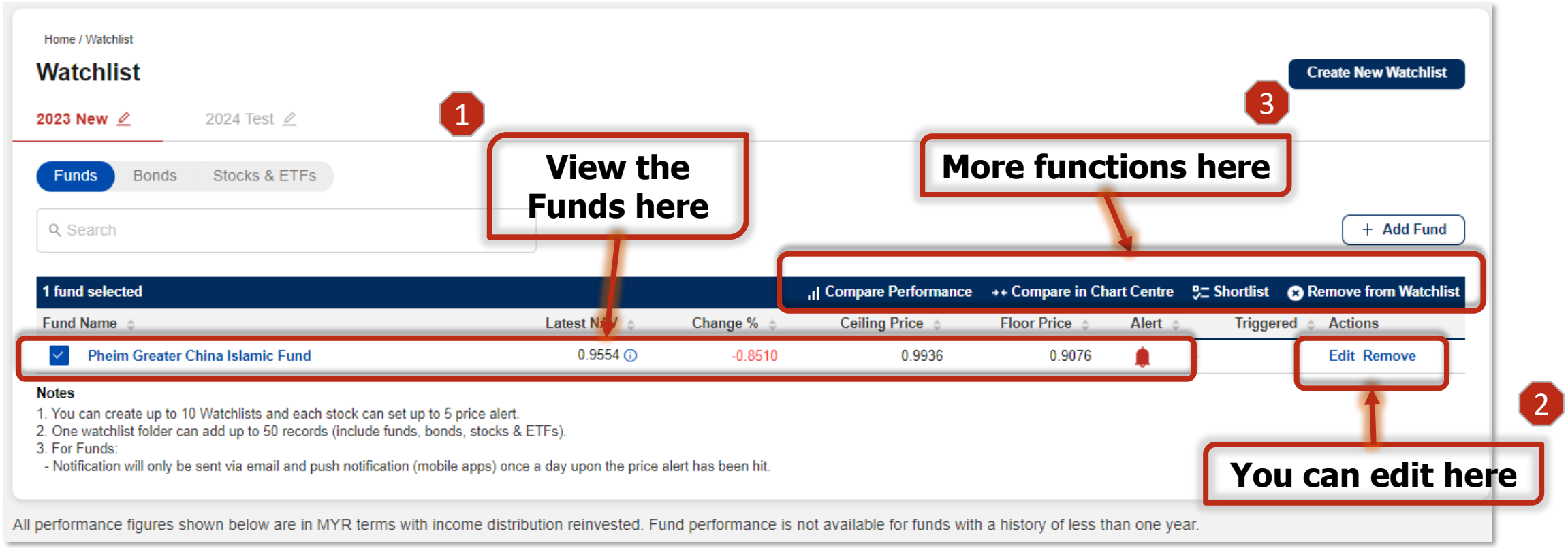
2 **Select Tracking Date**

3 **Select Yes to receive Notification**

4 **Select ceiling and floor price or percentage, then click [Save]**

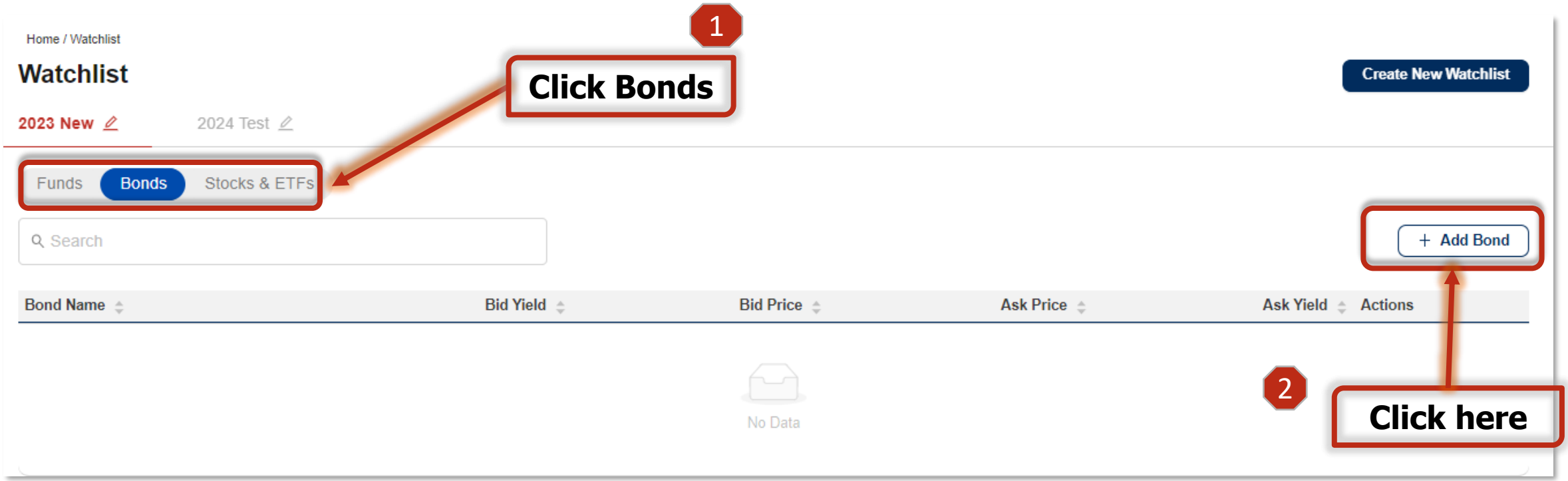
Create a Watchlist on FSMOne

Step 6 - view and more functions



Create a Watchlist on FSMOne

Step 4 - BOND Add bond

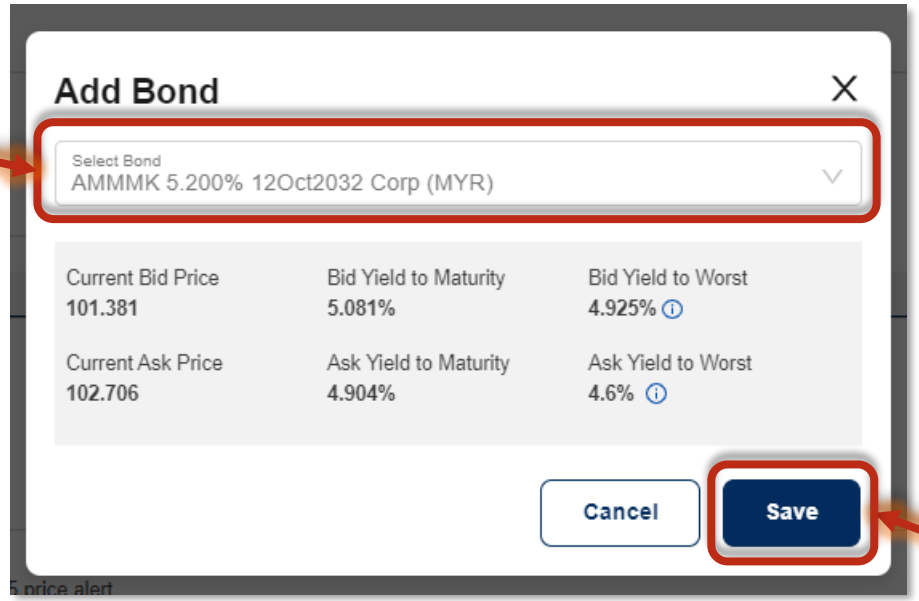


Create a Watchlist on FSMOne

Step 5 - BOND Add bond

1

Choose Bond

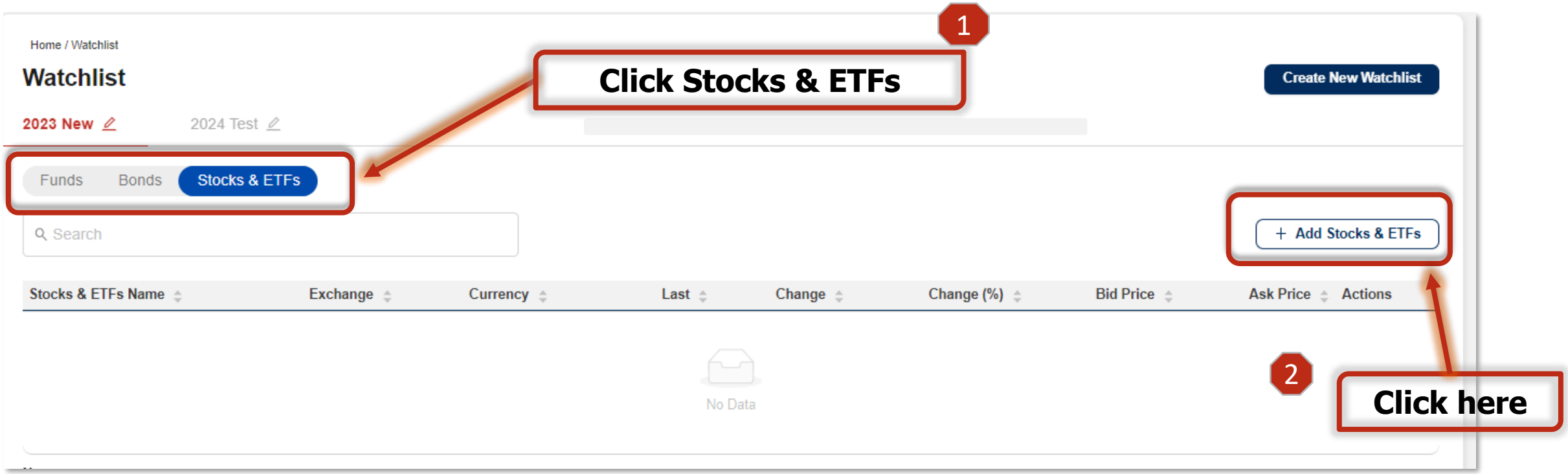


2

Click [Save]

Create a Watchlist on FSMOne

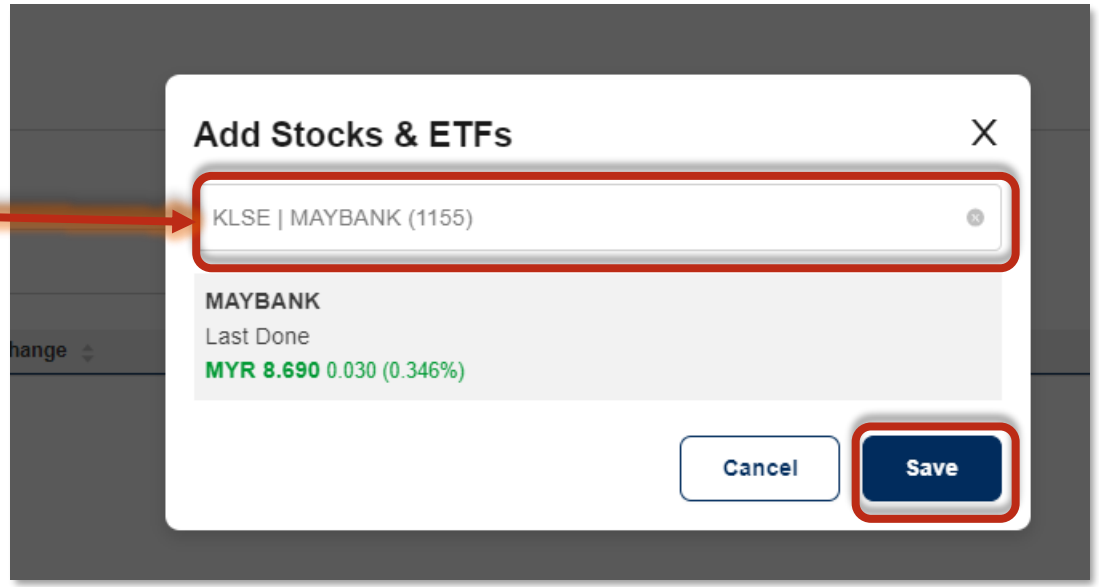
Step 4 - STOCKS & ETFs



Create a Watchlist on FSMOne

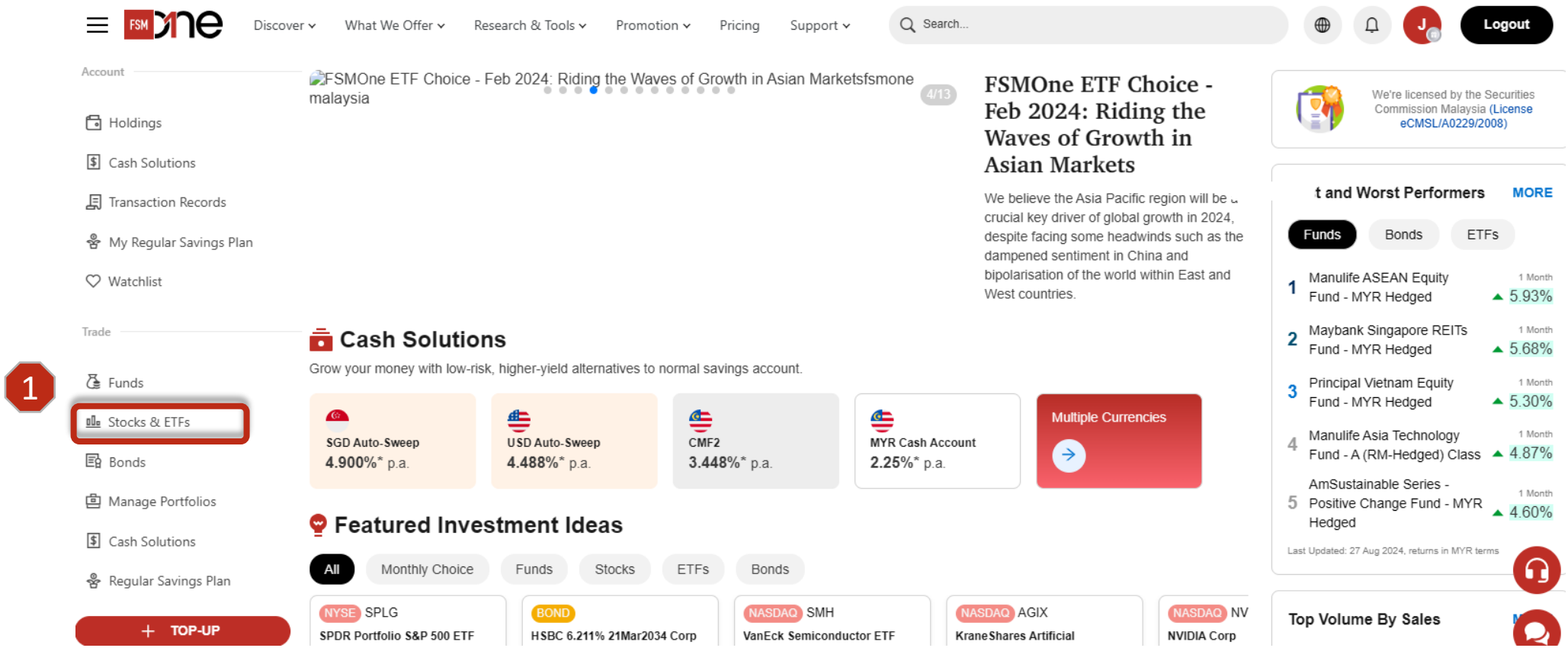
Step 5 - choose Stocks & ETFs

Choose Stocks & ETFs and click [Save]



Create a Watchlist on FSMOne

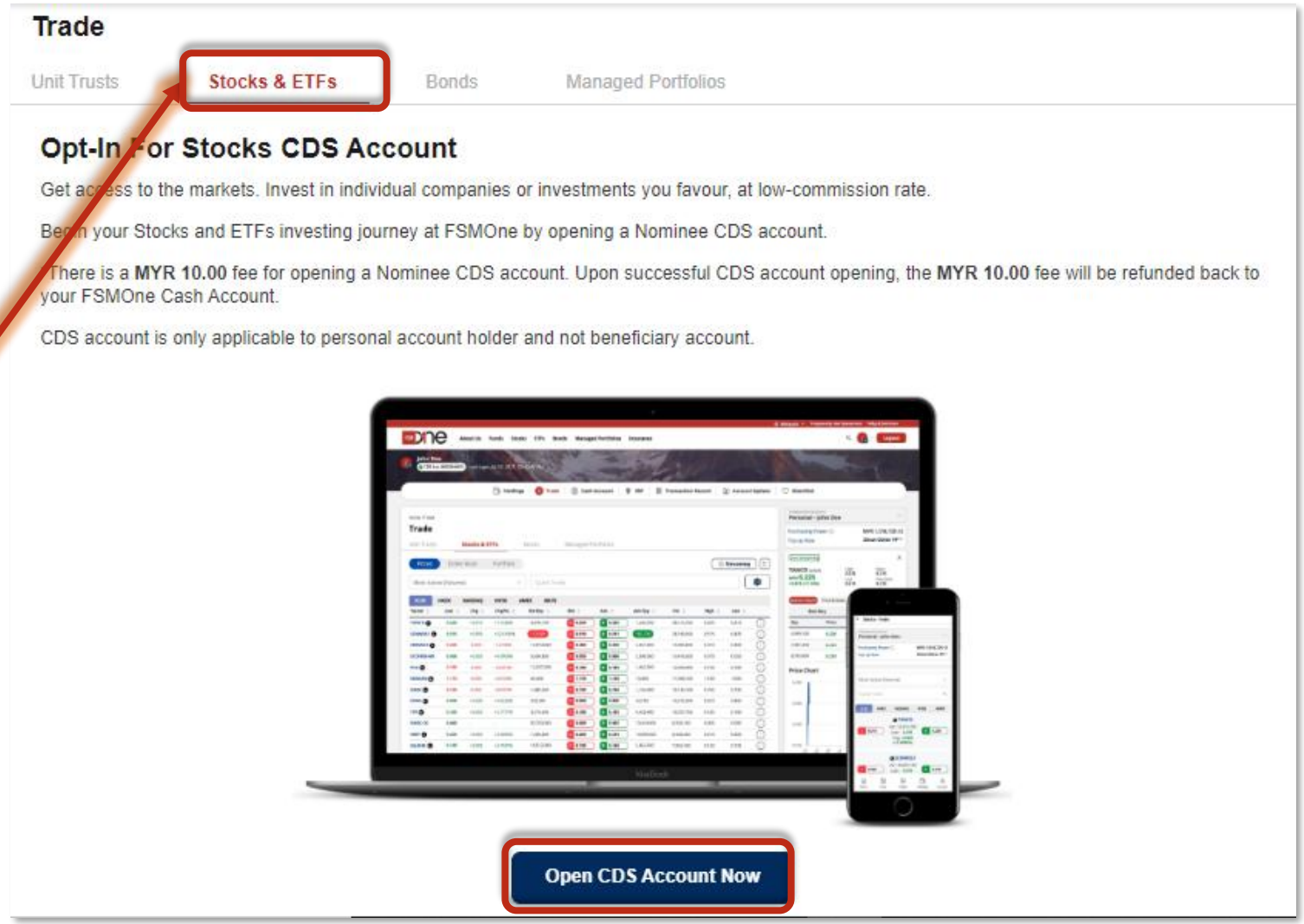
Step 6 - set Price alert for Stocks & ETFs



Create a Watchlist on FSMOne

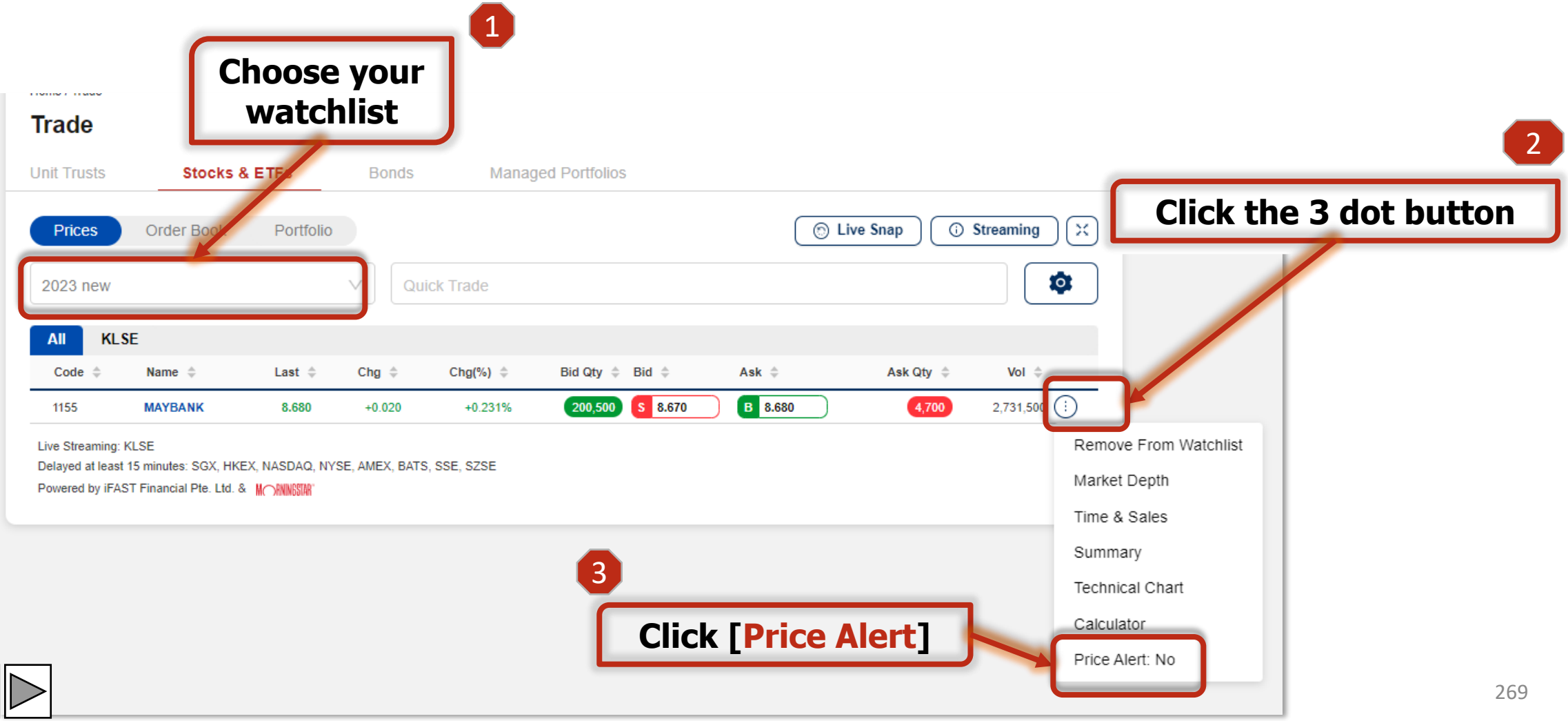
➲ **Step 7**

Click [Stocks & ETFs]



Create a Watchlist on FSMOne

Step 8 - set Price alert

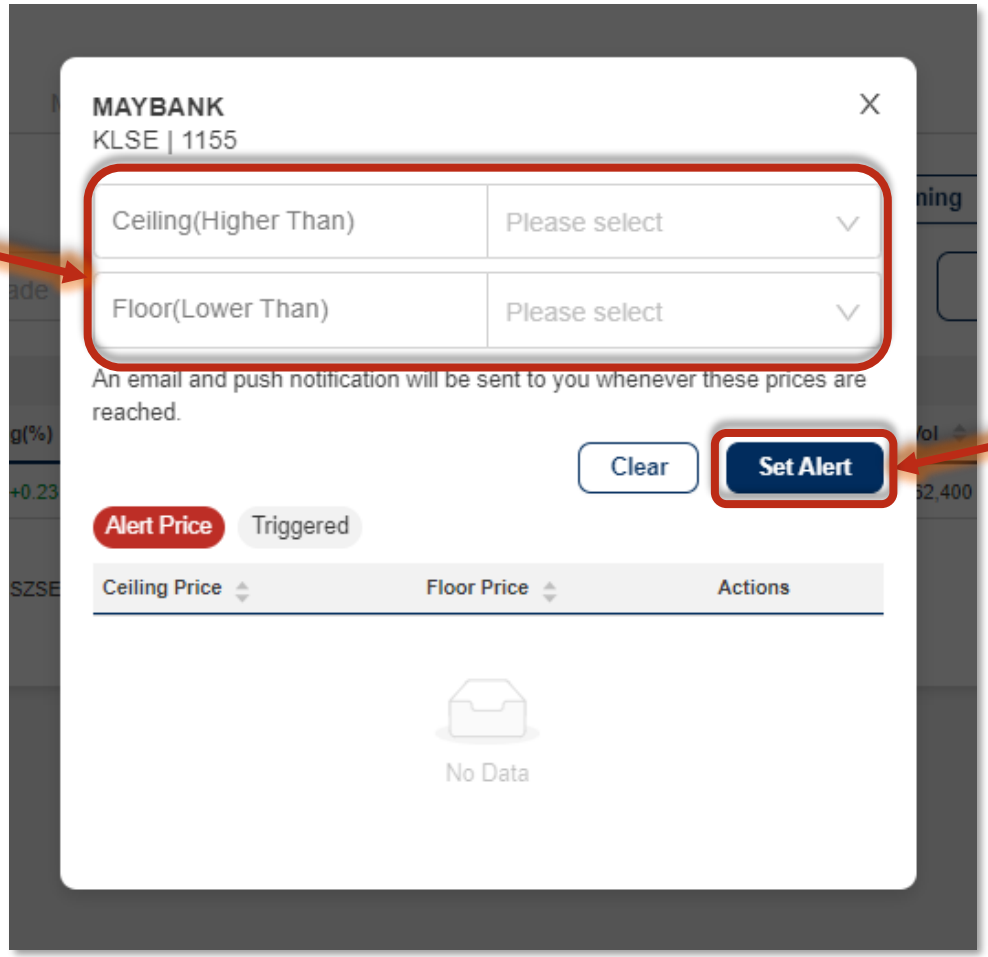


Create a Watchlist on FSMOne

Step 9 - set Price alert

1

Select ceiling and floor price or percentage

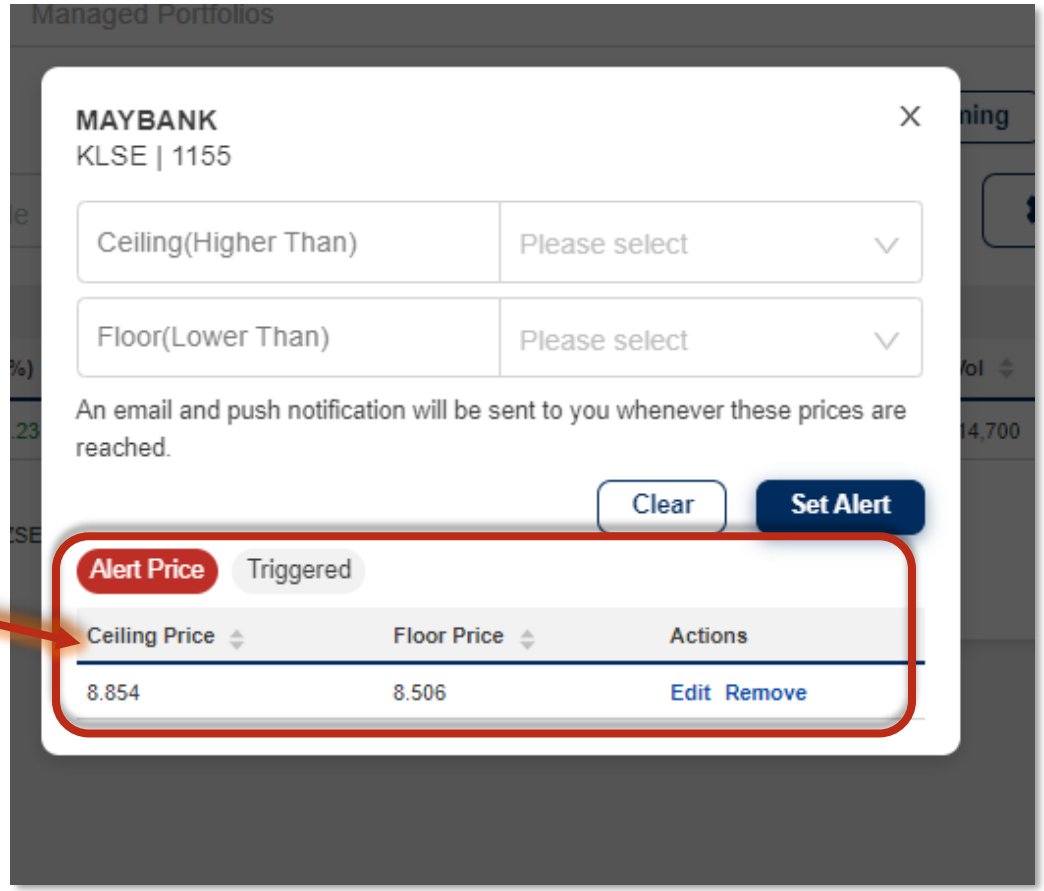


2

Click [Set Alert]

Create a Watchlist on FSMOne

Step 10 - set Price alert



You may edit/remove or view trigged price alert