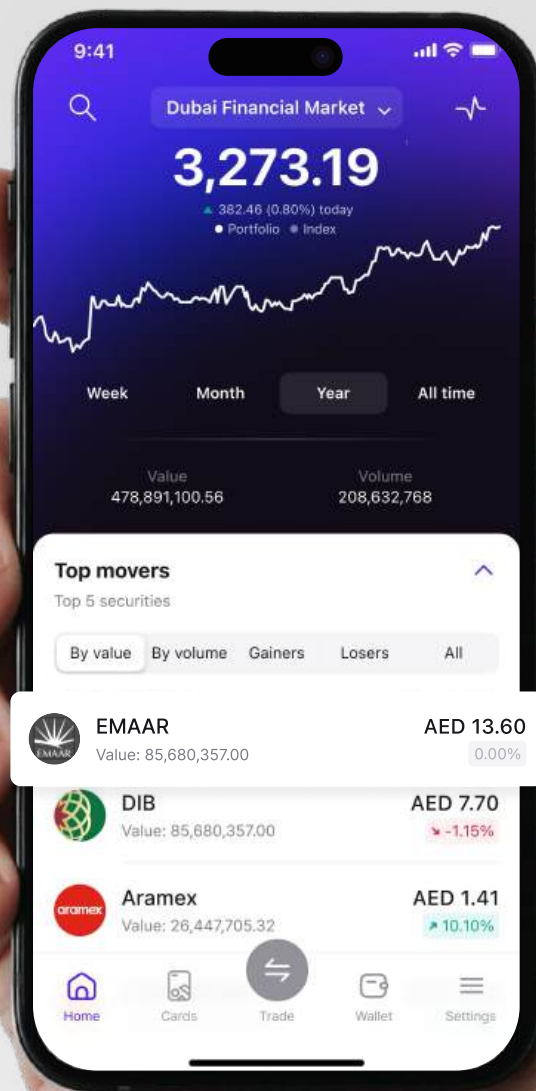


User Guide

Step by step guide to trading, wallet & account features



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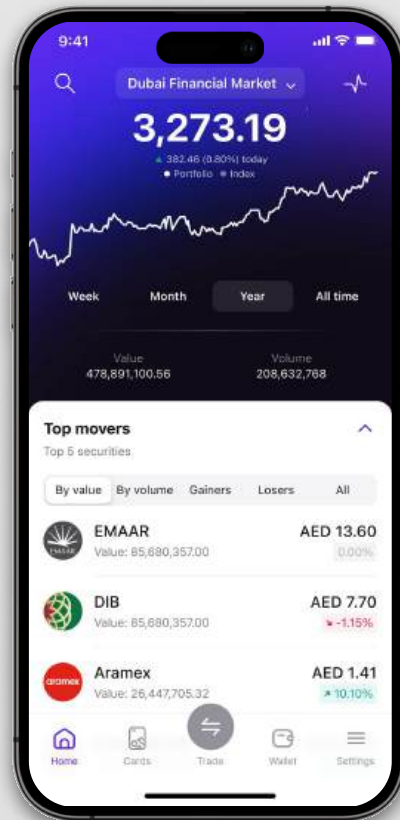
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GETTING STARTED

What is iVestor?

iVestor is Dubai Financial Market's official mobile investment platform, designed to help investors trade securities, manage funds, and monitor their portfolios securely and efficiently from one place.



What You Can Do with iVestor

- **Trade Assets**

Buy and sell supported financial assets with real-time price updates.

- **Manage Your Portfolio**

View holdings, track performance, and review activity history.

- **Control Your Funds**

Deposit, withdraw, and manage funds through a secure wallet system.

General Disclaimer

iVestor is a mobile investment application operated by Dubai Financial Market P.J.S.C. (“DFM”). The application is provided solely for informational and transactional purposes in relation to securities listed on the Dubai Financial Market. The content, tools, and features available through iVestor do not constitute financial, investment, legal, or tax advice. Nothing contained in the application shall be construed as an offer, invitation, or recommendation to buy, sell, or hold any financial instrument or to engage in any investment strategy.

User Responsibility & Suitability

Users are solely responsible for their investment decisions and for assessing whether any transaction is suitable or appropriate based on their individual objectives, financial situation, and risk tolerance. DFM does not assess suitability or provide personalized recommendations. Users should seek independent professional advice where necessary and verify all information before placing any transaction.

Investment Risk Disclosure

Investing in financial markets involves risk, including the potential loss of part or all of the invested capital. Prices of securities may fluctuate due to market, economic, or company-specific factors. Past performance is not indicative of future results.

Market Data & Information Accuracy

All market data, prices, news, research, and other information provided through iVestor are supplied on an “as is” and “as available” basis. Such information may be delayed, incomplete, or inaccurate. DFM does not warrant or guarantee the accuracy, completeness, or timeliness of any information provided.

Technology & Execution Risks

DFM does not guarantee uninterrupted or error-free operation of the application. Access to iVestor may be subject to delays, disruptions, system failures, or connectivity issues. DFM shall not be responsible for any losses arising from technical issues, execution delays, system outages, or reliance on third-party service providers, including brokers, custodians, or data vendors.

Limitation of Liability

To the fullest extent permitted under applicable law, DFM shall not be liable for any direct, indirect, incidental, consequential, or special damages, including loss of profits or opportunity, arising out of or in connection with the use of, or inability to use, the application, reliance on its content, or execution of transactions through the platform.

Jurisdiction & Compliance

The application is intended for use only in jurisdictions where its use is permitted by applicable law. Users are responsible for ensuring compliance with all applicable laws and regulations, including those of the United Arab Emirates.

Educational Content

Any examples, illustrations, workflows, and guidance provided within the application or related user materials are for general informational and educational purposes only and do not constitute investment recommendations.

Contact Us

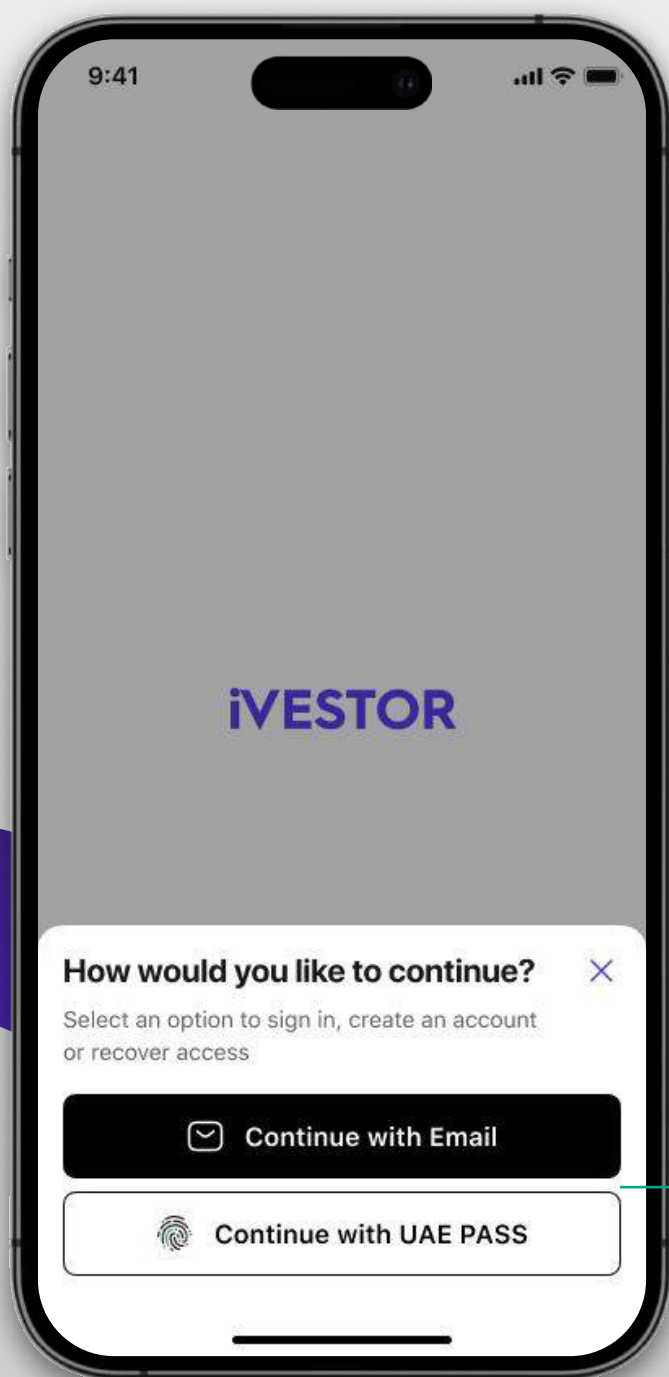
iVestor

Email: support@ivestor.ae

Website: www.ivestor.ae

Address: World Trade Centre (Rashid Tower) Sheikh Zayed Road

How to Onboard to iVestor



01 .

Start Your Registration

Create your account using your email address or UAE PASS.

How to Onboard to iVestor

02.

Enter Your Email

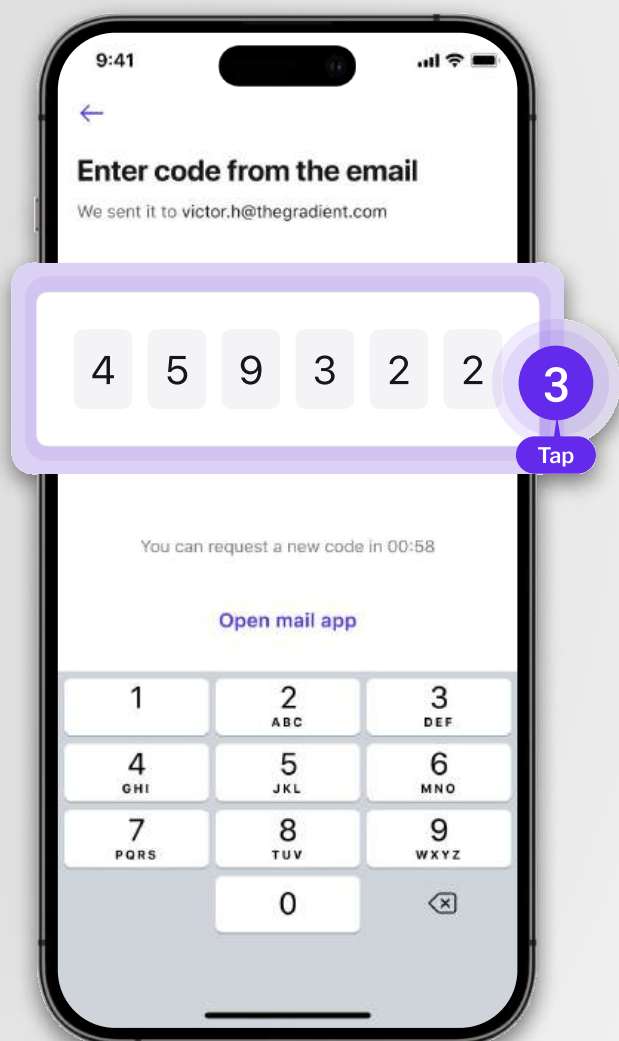
Enter your email address to create your account.



03.

Provide OTP

Enter the code sent to your email.

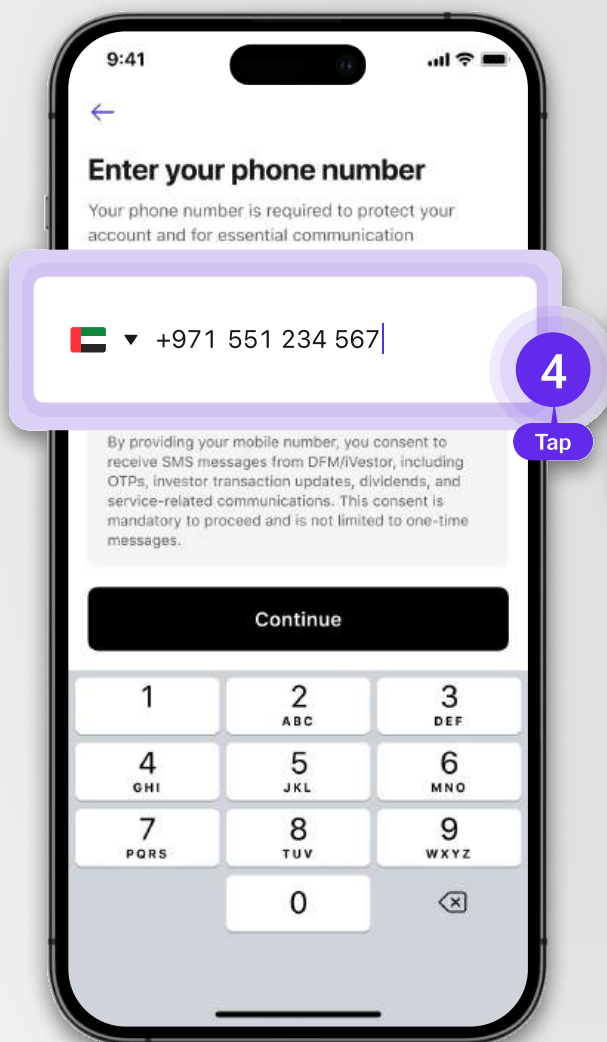


How to Onboard to iVestor

04.

Add Your Phone Number

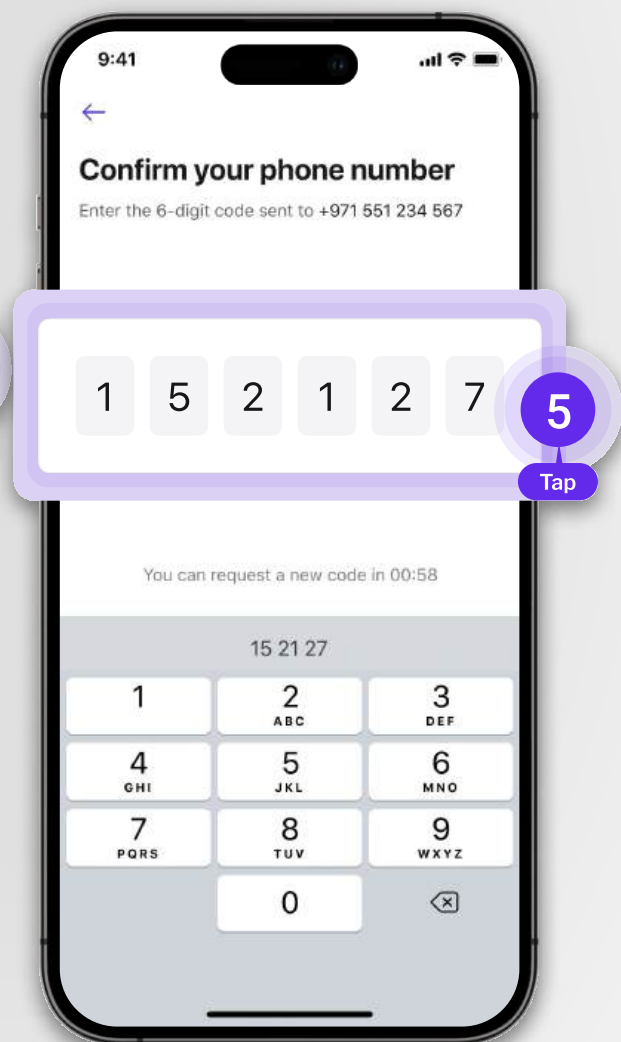
Enter your registered phone number.



05.

Verify Your Phone Number

Enter the OTP sent to your mobile number.

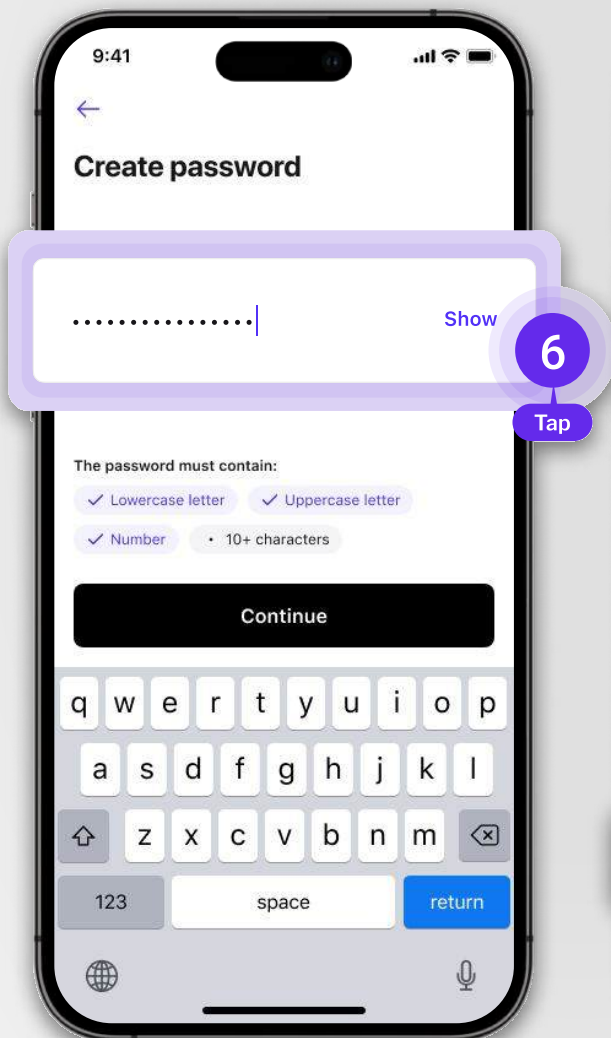


How to Onboard to iVestor

06.

Create Password

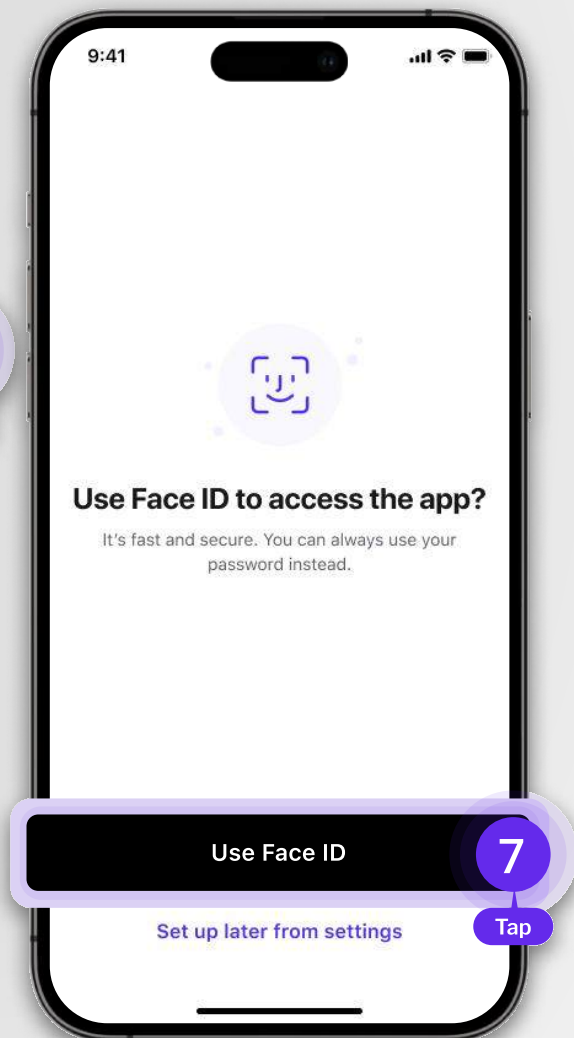
Set a strong password to secure your account.



07.

Enable Face ID (Optional)

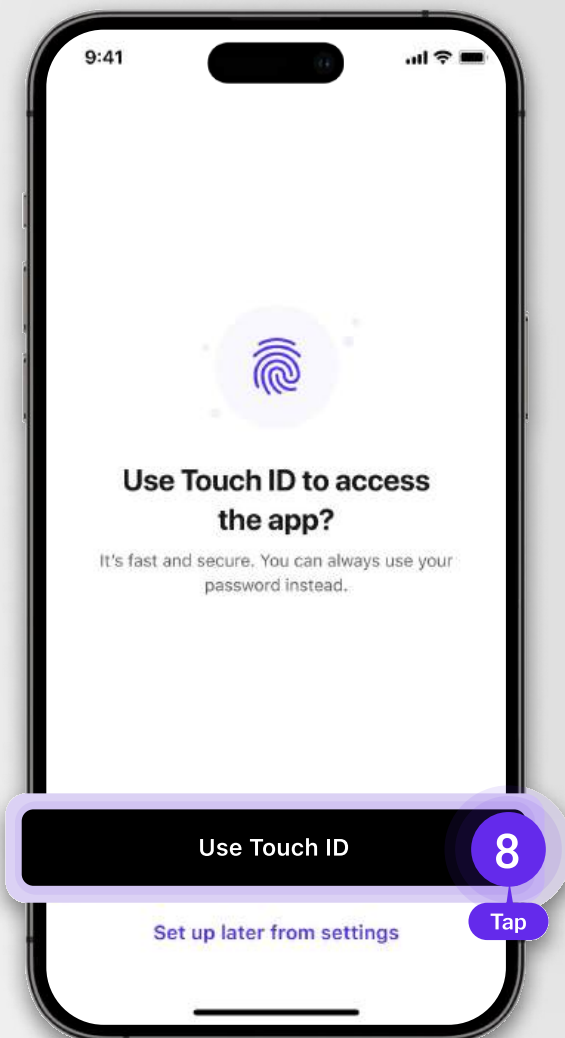
Use Face ID for faster and more secure sign in.



How to Onboard to iVestor

08 . Enable Touch ID (Optional)

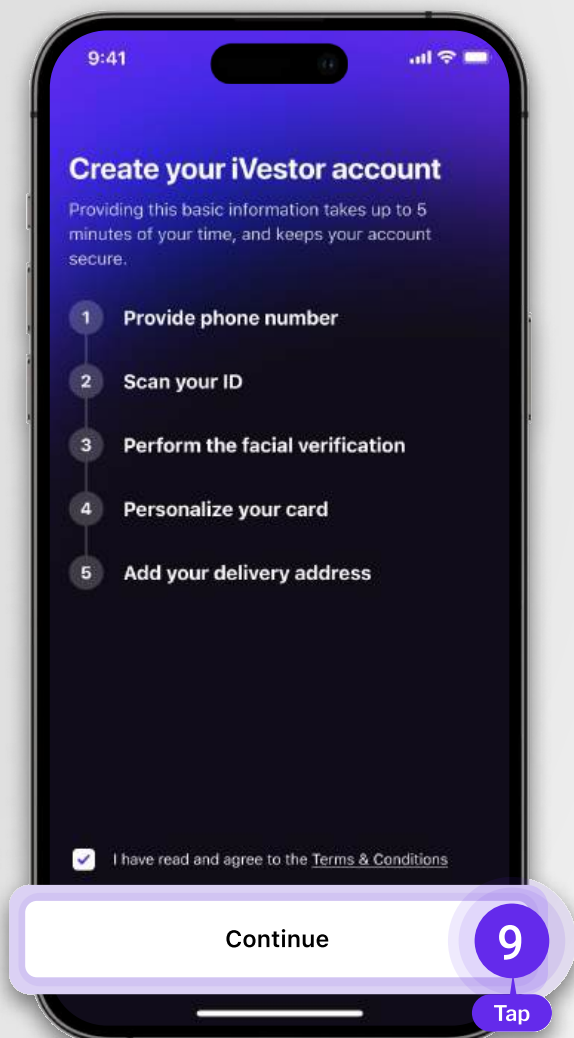
Use biometrics for faster and more secure sign in.



09 . Review Account Setup

See the steps required to complete your iVestor account.

- ① Make sure you have your Emirates ID or Passport ready before you begin.



How to Activate Your Digital Card

10. Personalize Your Card

Choose the name that will appear on your card.

9:41

Enter cardholder name

Card **IVESTOR**

0000
0000
0000
0000

Expiry
00/00

CVV
● ● ●

HAMAD SALEM ABDALLAH
1 character is available

Choose at least 2 names:

Hamad Salem Ali Abdallah Ibrahim

Continue 10 Tap

11. Enter Your Address

Provide your residential address.

9:41

Enter your residence address

Phone number
+971 551 234 567
The courier will contact you via this number

Country
United Arab Emirates
Country is based on the provided phone number

City
Dubai

Address
34H9+RX

P.O. Box / ZIP code

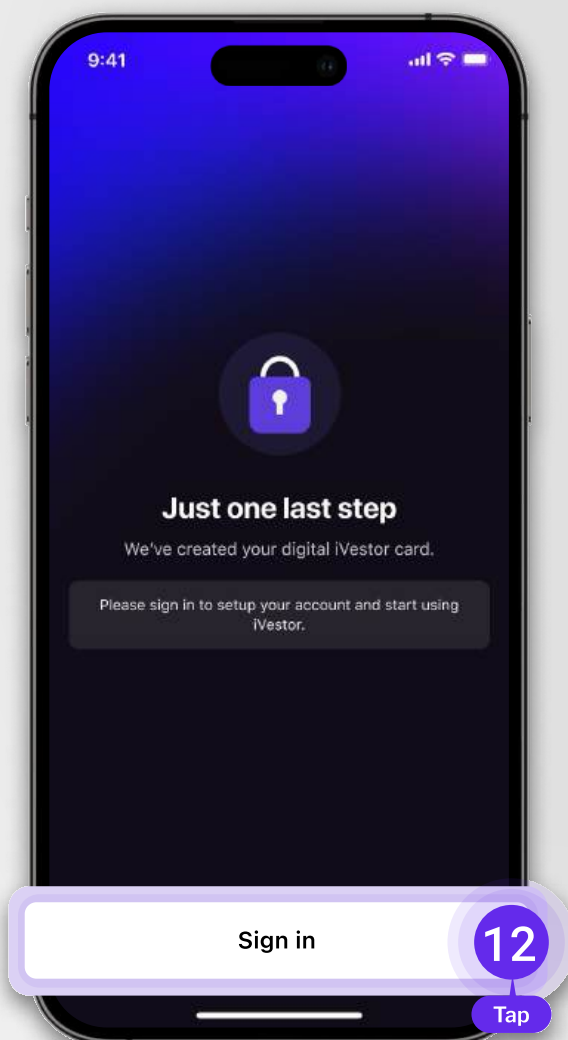
Optional field

Continue 11 Tap

How to Activate Your Digital Card

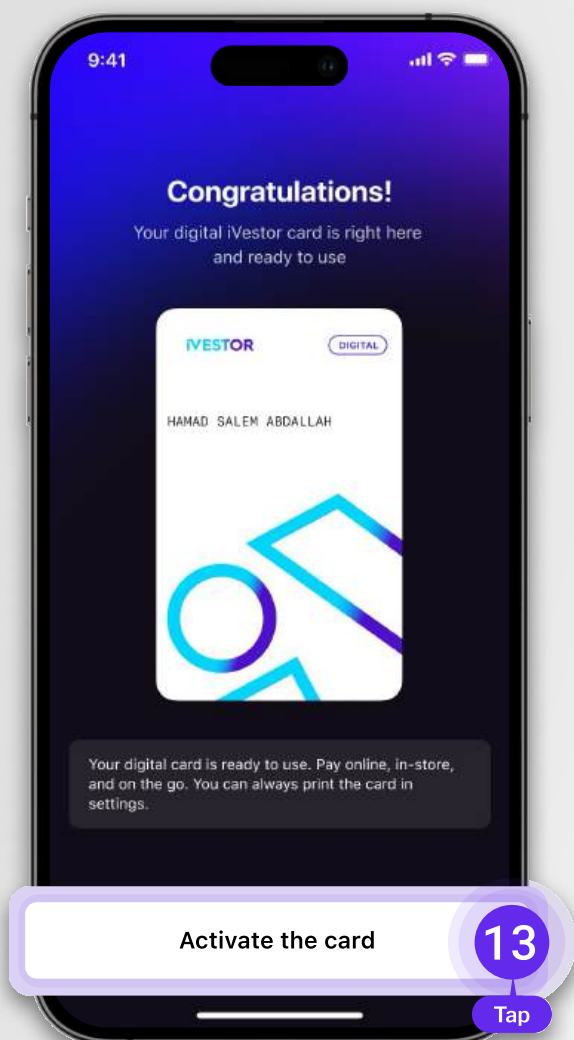
12. iVestor Digital Card Created

Your iVestor digital card is created and you can use it by signing into your account.



13. Activate Your Digital Card

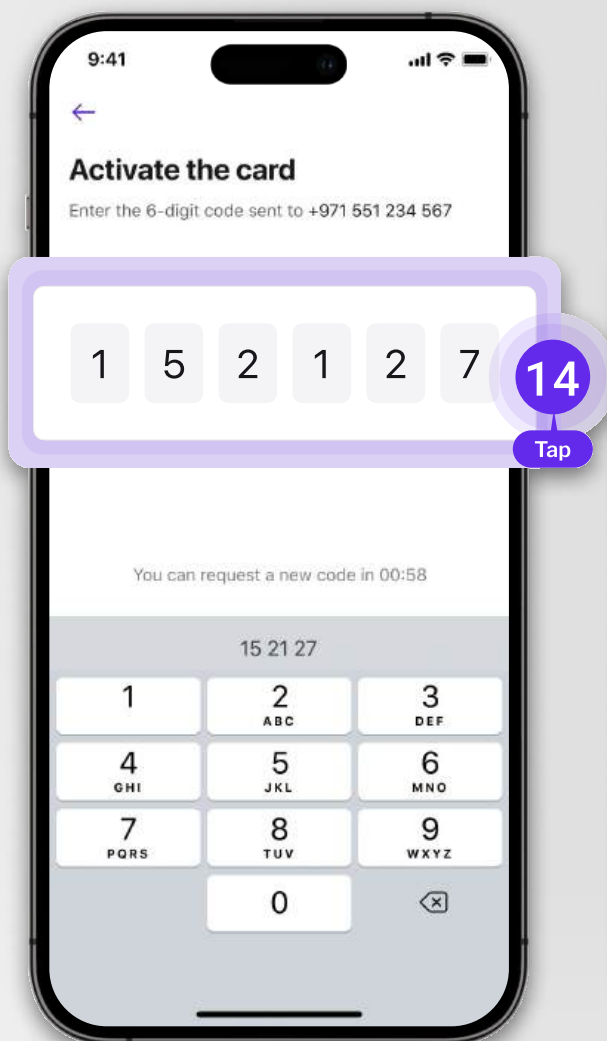
Your digital card is ready to be activated.



How to Activate Your Digital Card

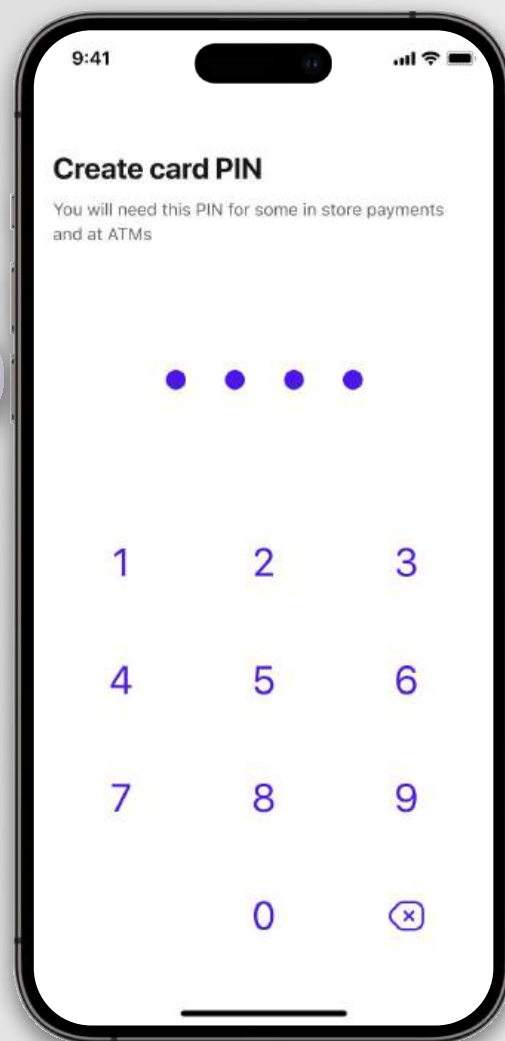
14. Enter OTP

Verify your card using the code sent to your phone.



15. Create Card PIN

Set a secure PIN for ATM and in-store transactions.

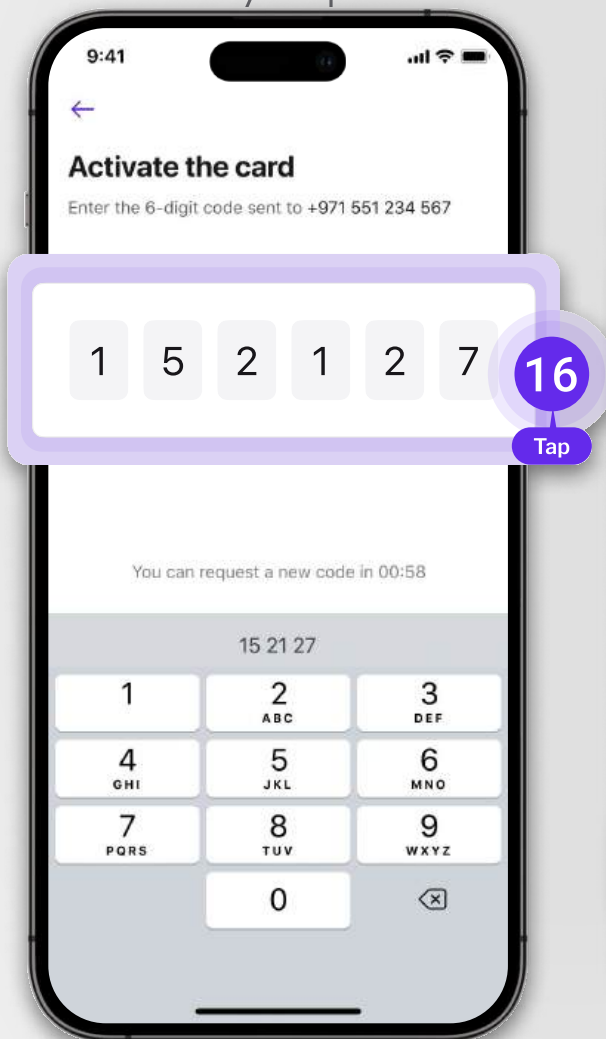


How to Activate Your Digital Card

16.

Activate Your Card

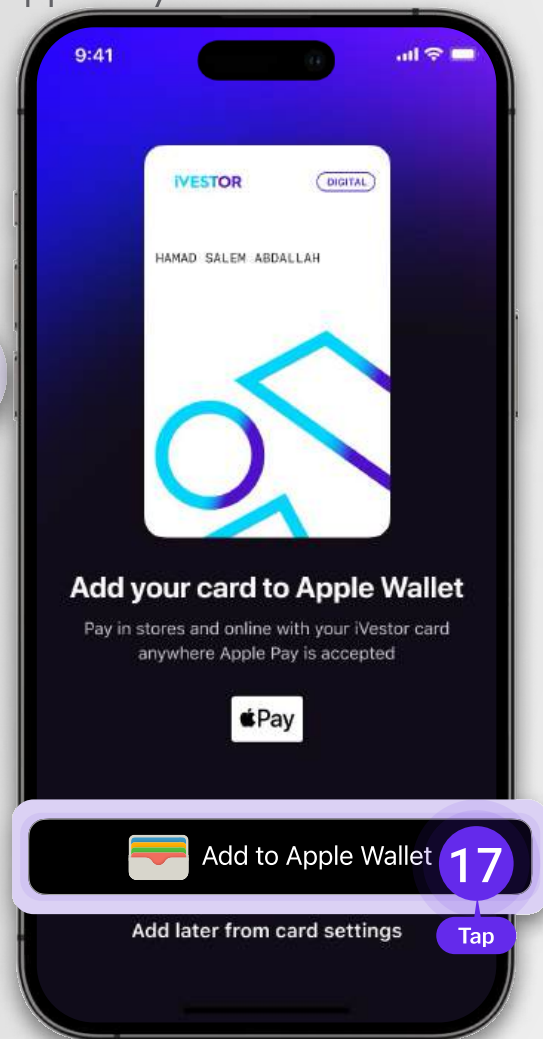
Verify your card using the code sent to your phone.



17.

Add to Apple Wallet

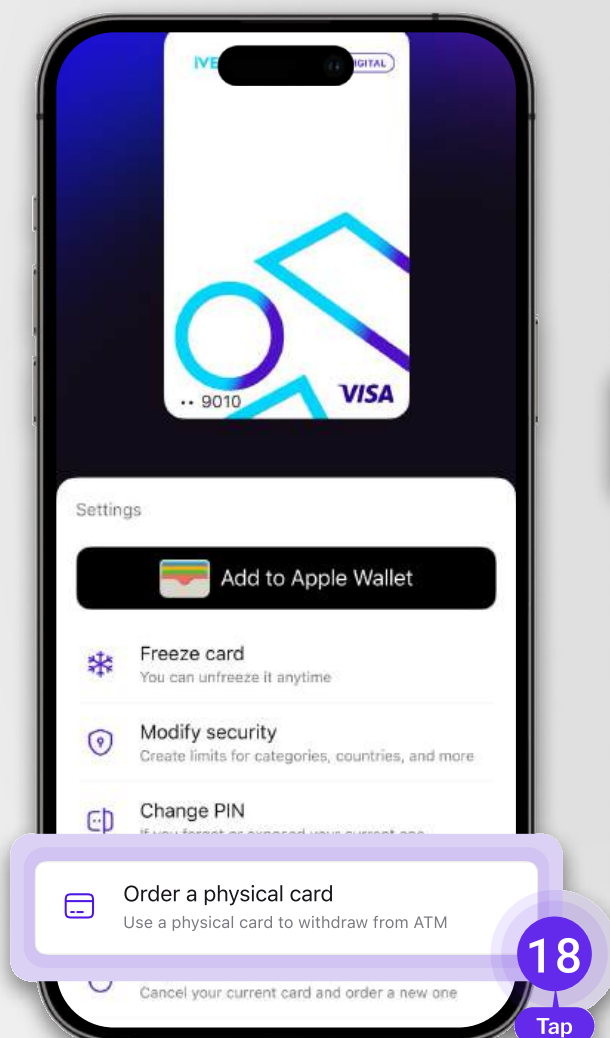
Use your card instantly with Apple Pay.



How to Activate Your Digital Card

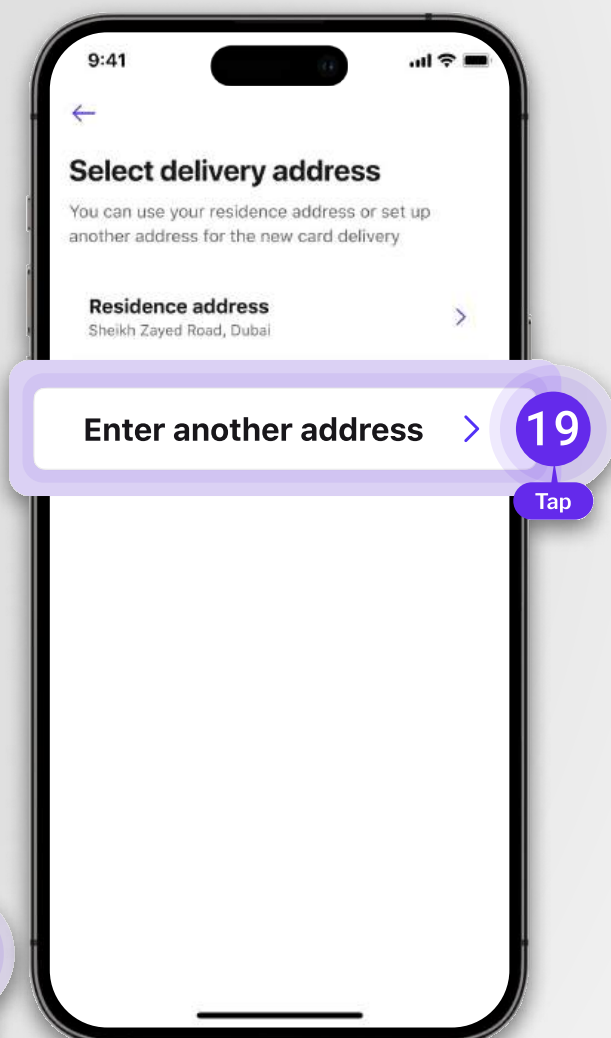
18. Order a Physical Card (Optional)

If you prefer a physical card, you can order one from settings.



19. Select Delivery Address

Choose your registered address or add a new delivery address.

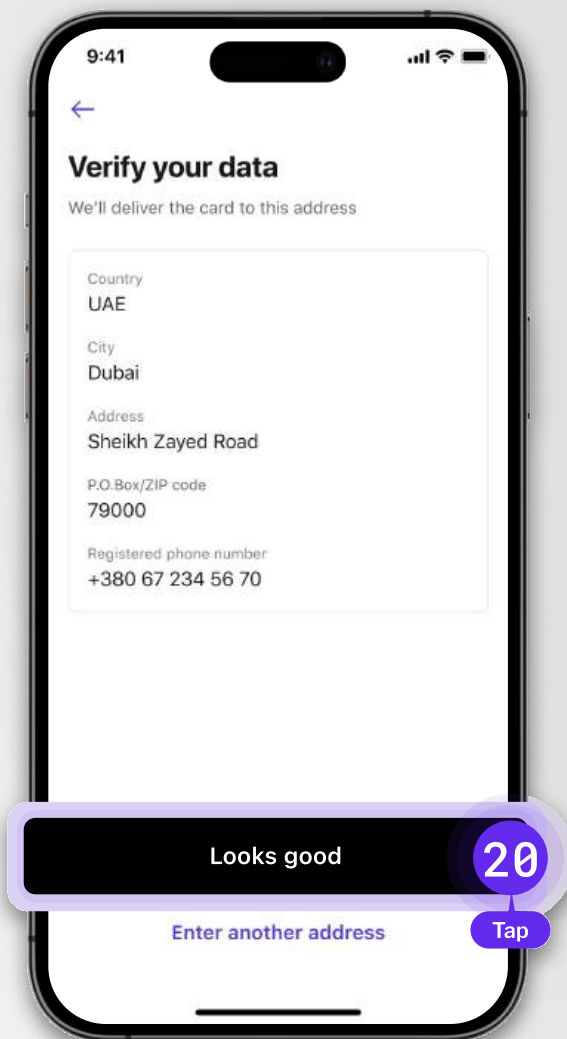


How to Activate Your Digital Card

20.

Review Address Details

Review your delivery address and continue.

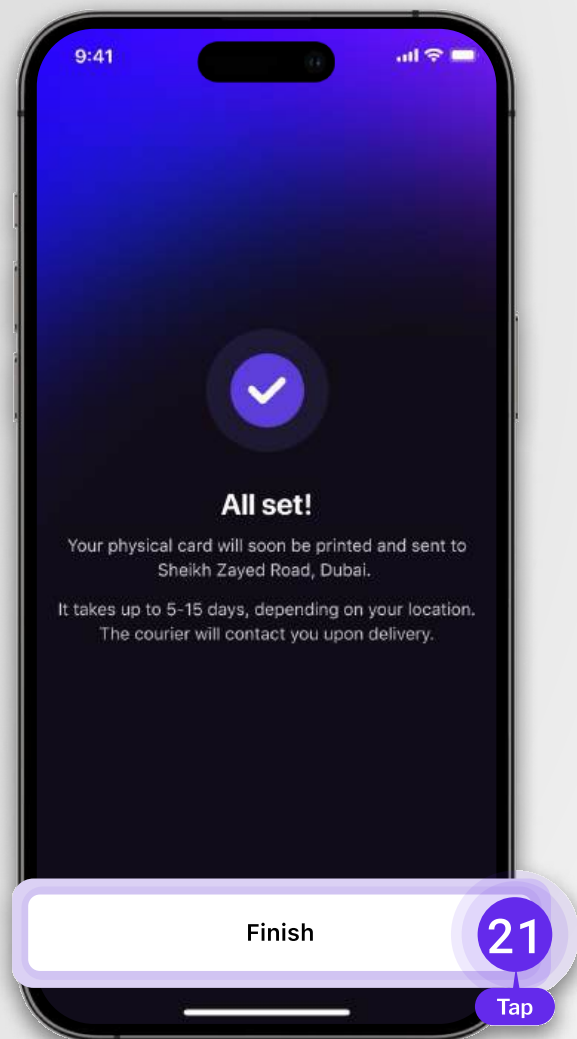


21.

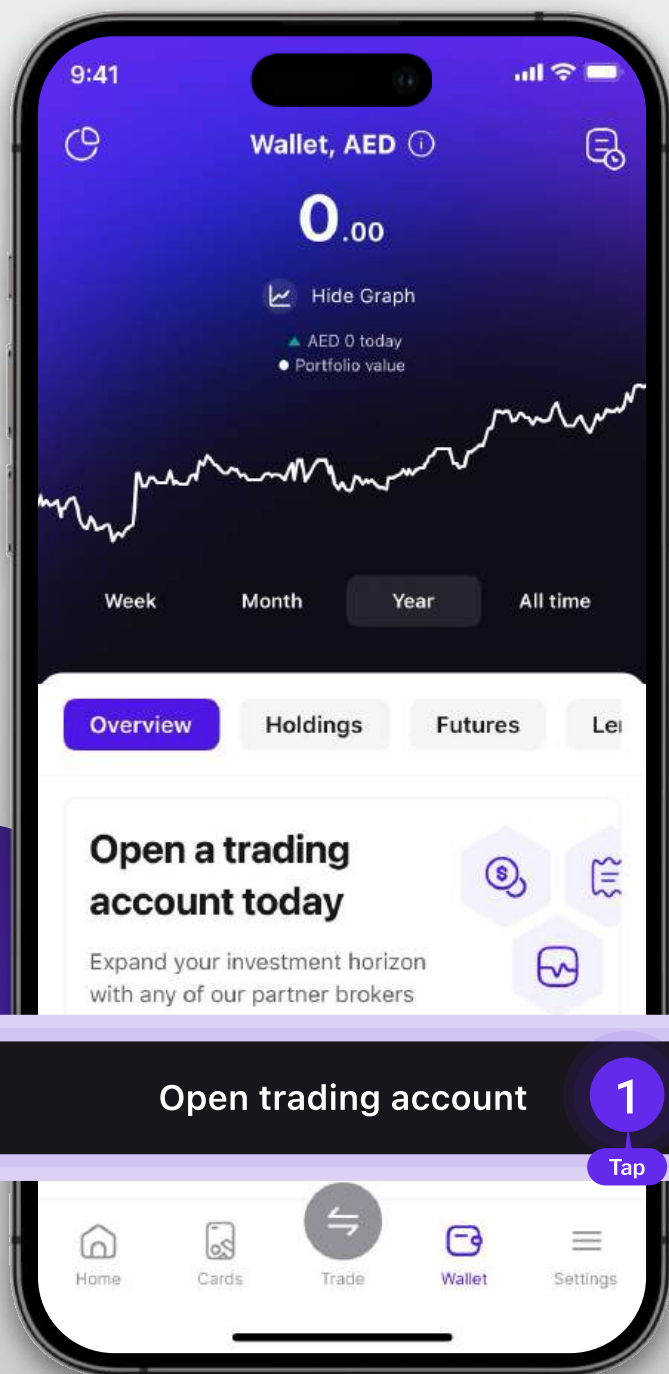
Physical Card Request Submitted

Your physical card is being printed and will be delivered soon.

ⓘ It may take up to 3-5 working days for your card to be delivered. For international deliveries, please allow 7-14 working days.



How to Open a Trading Account



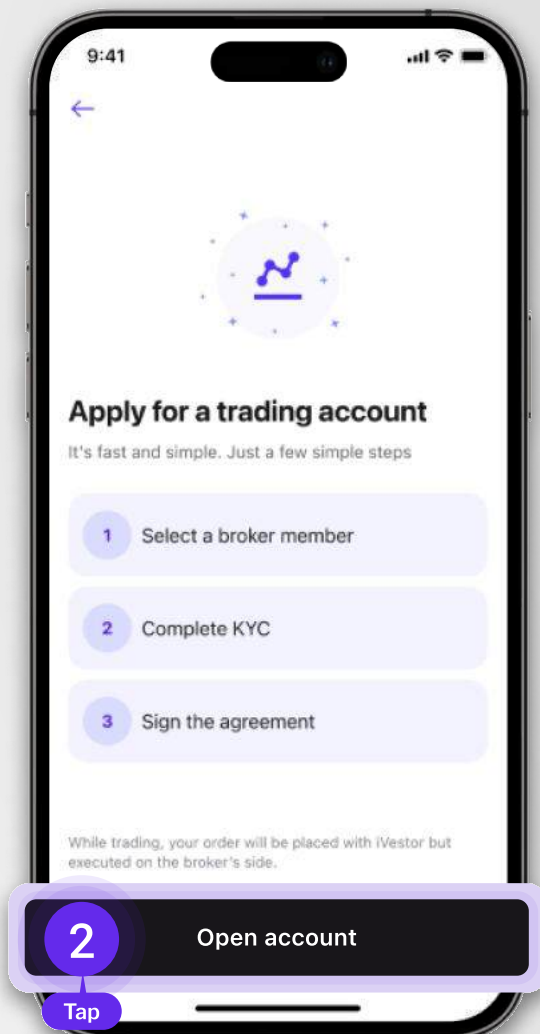
01. Go To Wallet Tab

Indicates that you have no active holdings and prompts you to open a account.

How to Open a Trading Account

02 . Intro Page

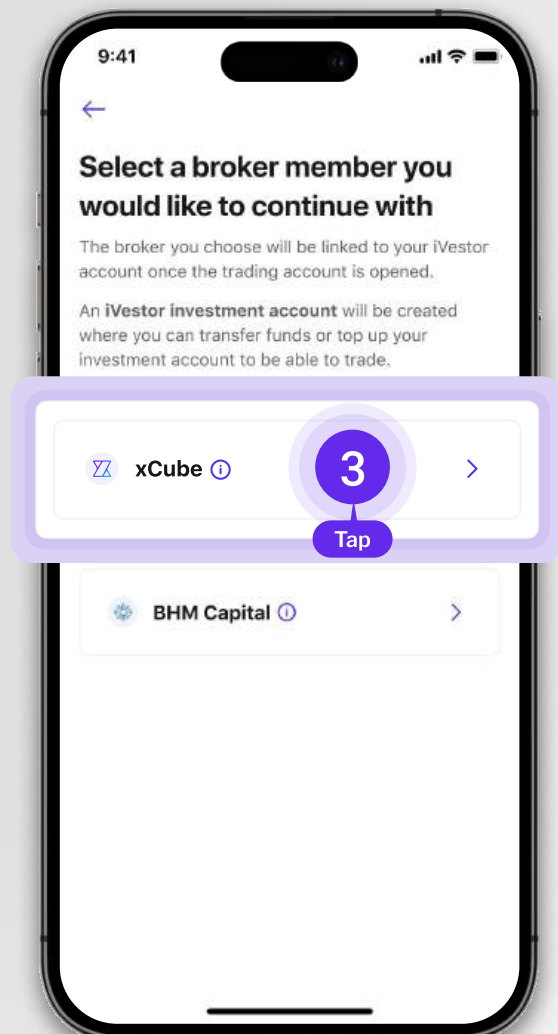
Start the process by completing all the steps.



03 . Select Broker

Choose your preferred broker.

① Note: You will need a valid **Proof of Address** to upload during the account opening process.

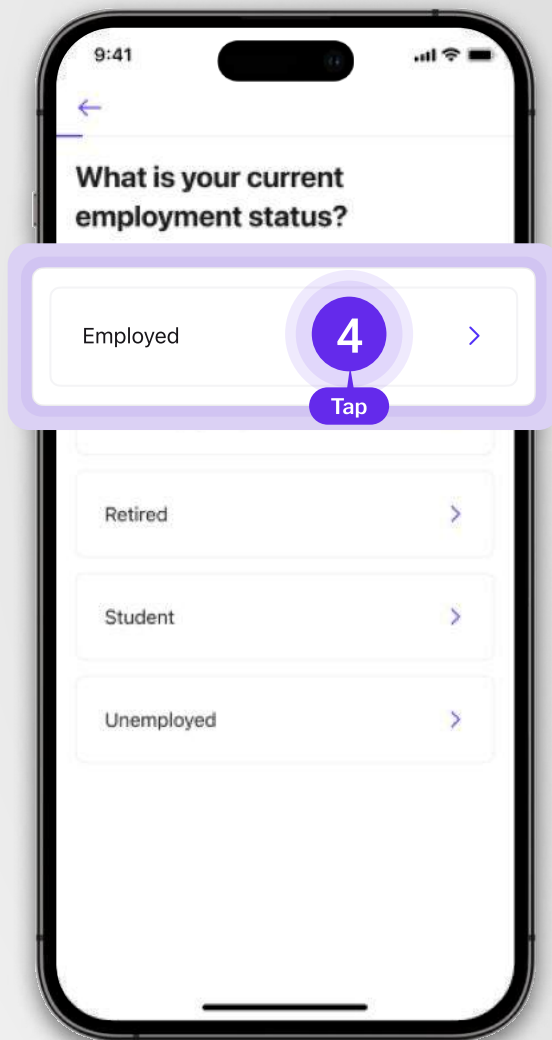


How to Open a Trading Account

04.

Answer A Few Questions

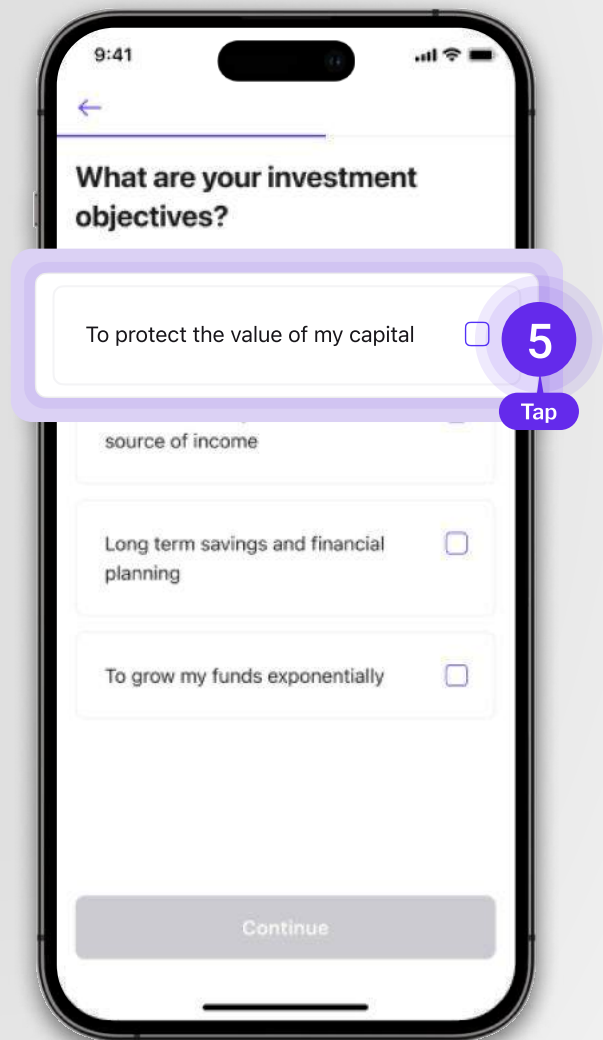
Select your current employment status



05.

Select Your Objectives

Select your reason for trading.



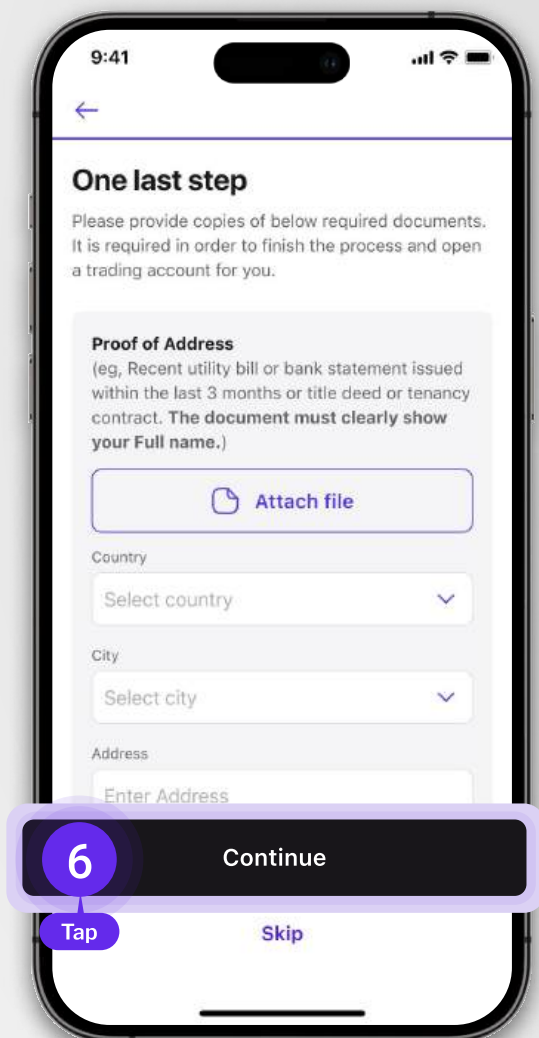
How to Open a Trading Account

06 .

Upload Documents

Upload all the necessary documents.

 Make sure the details you upload match your official records.



9:41

←

One last step

Please provide copies of below required documents. It is required in order to finish the process and open a trading account for you.

Proof of Address
(eg, Recent utility bill or bank statement issued within the last 3 months or title deed or tenancy contract. **The document must clearly show your Full name.**)

 **Attach file**

Country
Select country ▼

City
Select city ▼

Address
Enter Address

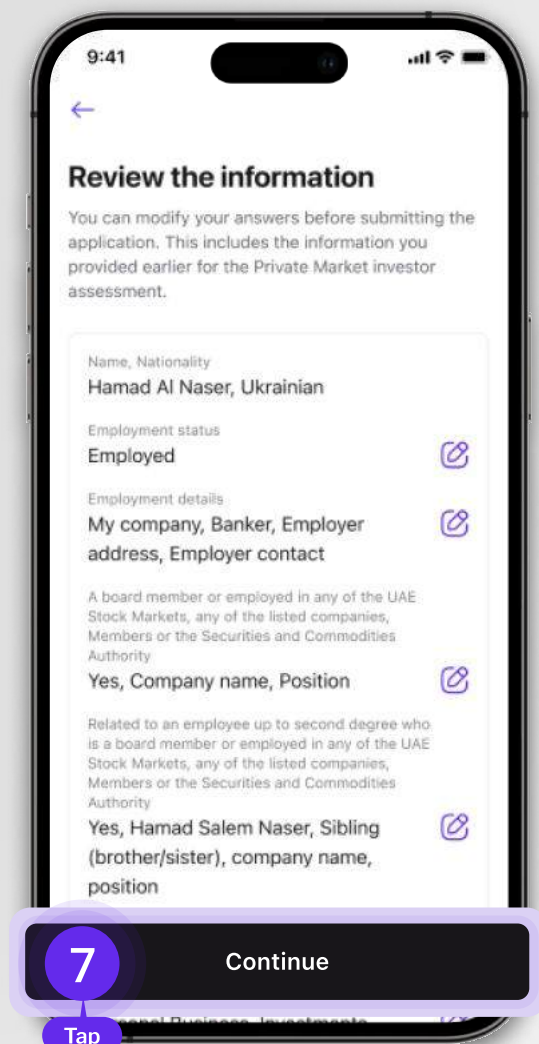
6 **Continue**
Tap

Skip

07 .

Review Information

Review and edit your personal, employment, and financial details.



9:41

←

Review the information

You can modify your answers before submitting the application. This includes the information you provided earlier for the Private Market investor assessment.

Name, Nationality
Hamad Al Naser, Ukrainian

Employment status
Employed

Employment details
My company, Banker, Employer address, Employer contact

A board member or employed in any of the UAE Stock Markets, any of the listed companies, Members or the Securities and Commodities Authority
Yes, Company name, Position

Related to an employee up to second degree who is a board member or employed in any of the UAE Stock Markets, any of the listed companies, Members or the Securities and Commodities Authority
Yes, Hamad Salem Naser, Sibling (brother/sister), company name, position

7 **Continue**
Tap

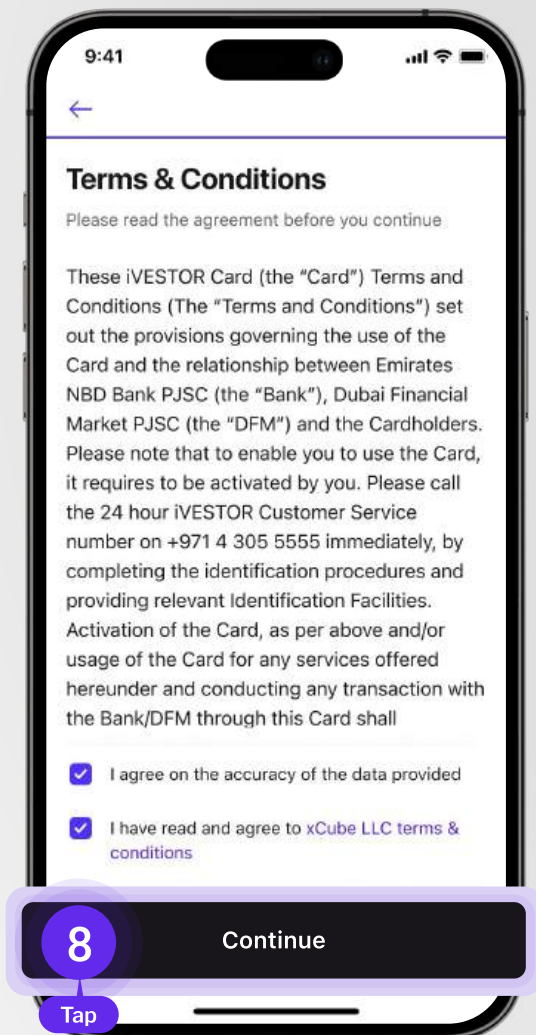
How to Open a Trading Account

08.

Terms And Conditions

Review and accept the agreement before continuing.

- ① Your trading account will be issued by the selected broker and is subject to their approval.

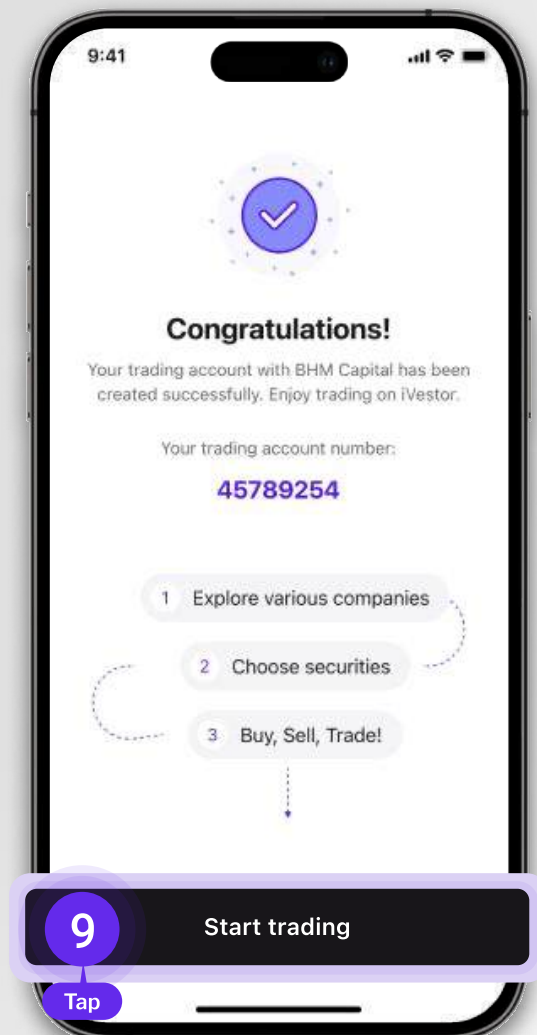


09.

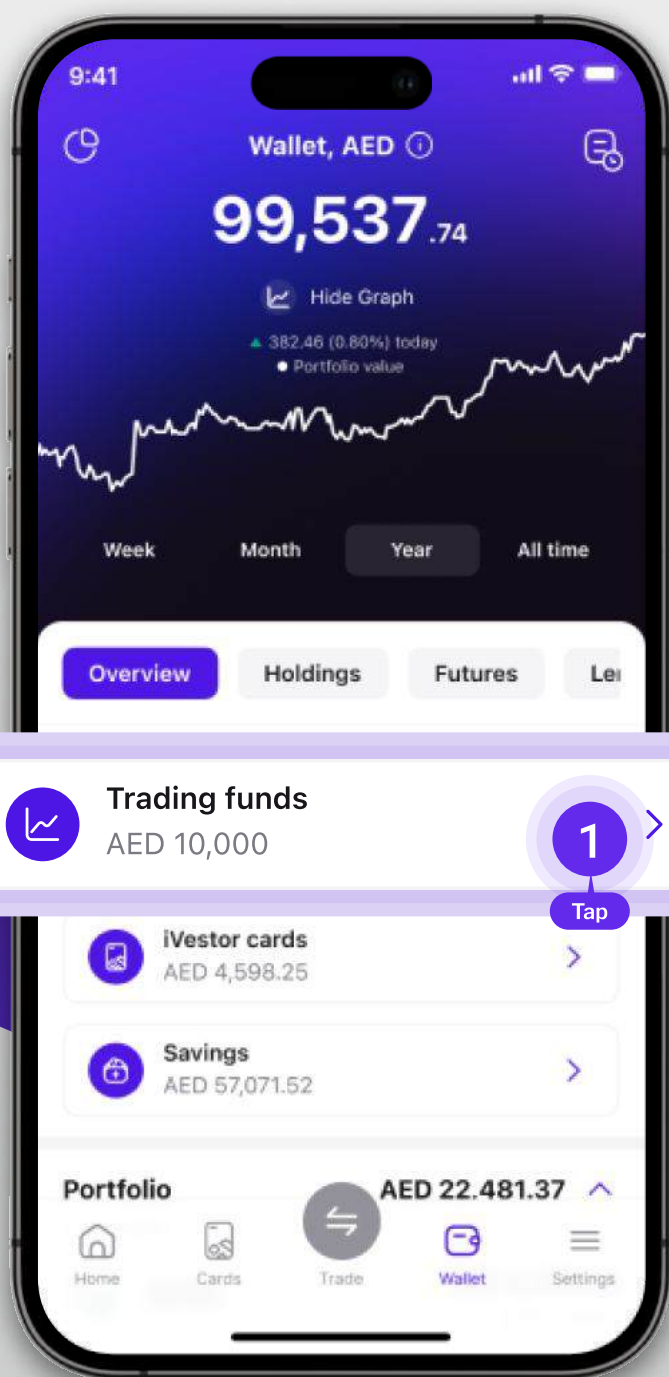
Account Creation Success

Your trading account has been successfully created, and you can now start trading.

- ① If you did not receive your trading account number, your broker will reach out to you for additional requirements.



How to Deposit into Your Trading Fund Account



01. Click On Trading Funds From Wallet

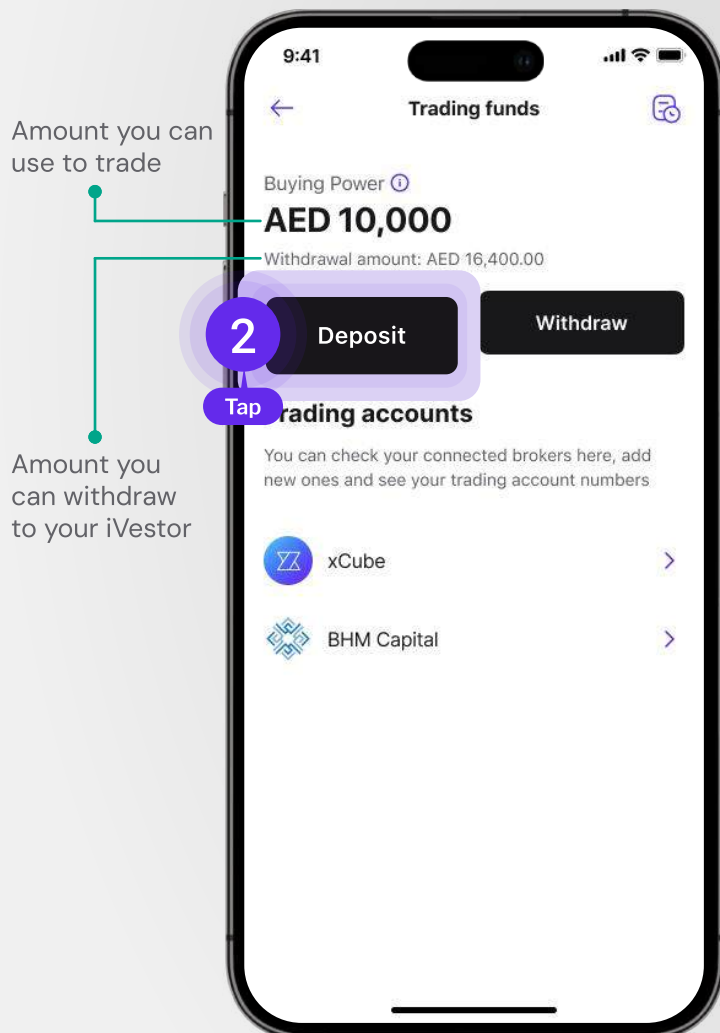
View your trading fund account balance here.

i Your trading funds account will be created once your trading account is active.

How to Deposit into Your Trading Fund Account

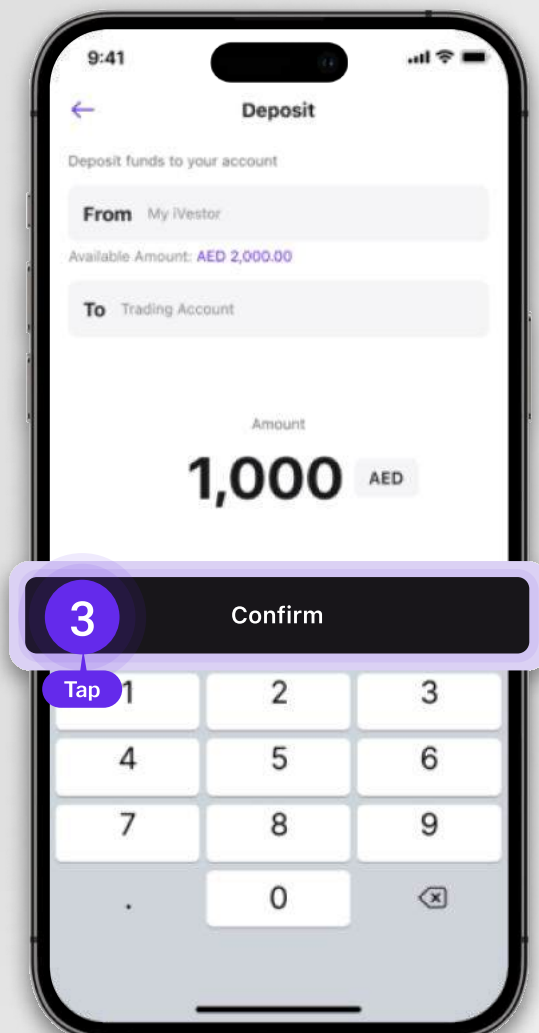
02 . Select Deposit

Displays your available buying power and withdrawal amount, with options to deposit or withdraw funds.



03 . Enter Amount

Transfer funds from your iVestor account to your trading account.



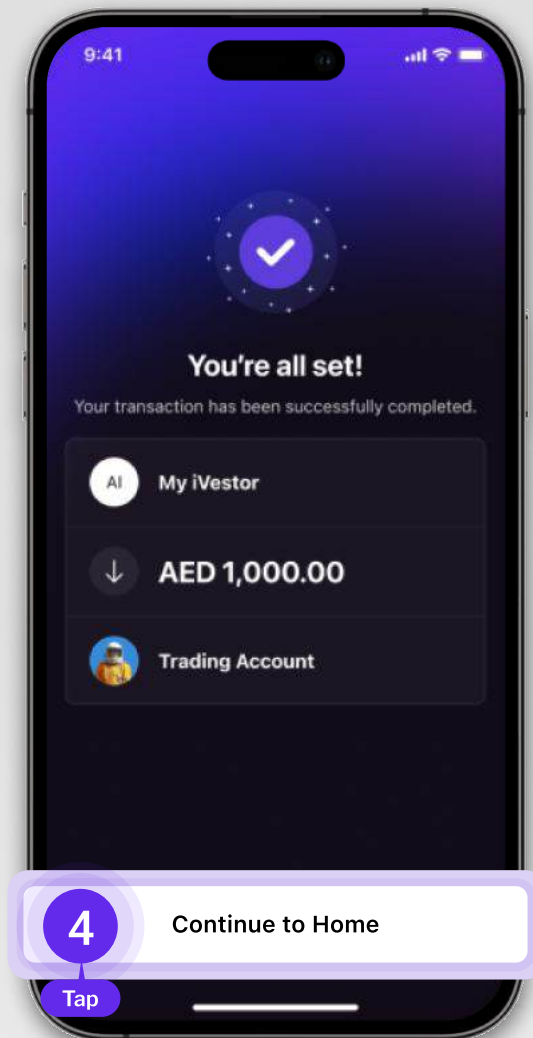
How to Deposit into Your Trading Fund Account

04.

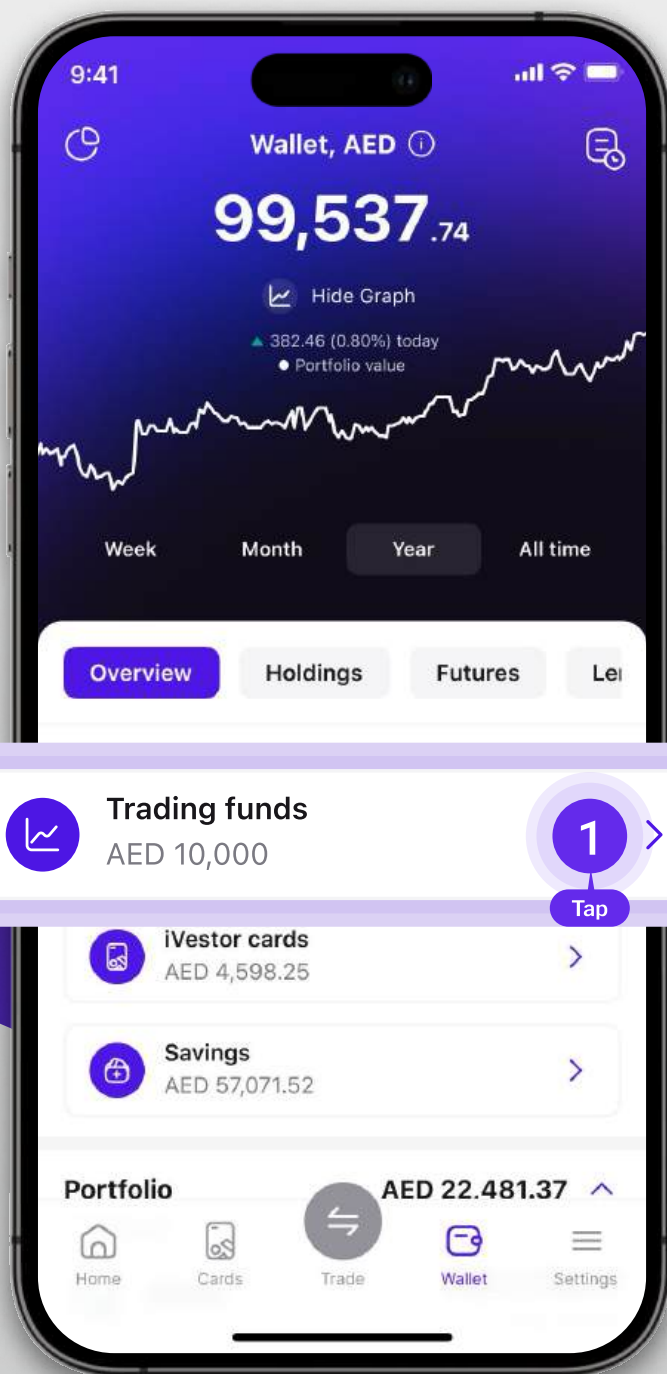
Transfer Complete

Confirms your transfer has been completed successfully and shows transaction details.

 You can start trading instantly once your funds have been deposited.



How to Withdraw from Your Trading Fund Account



01.

Open Trading Funds

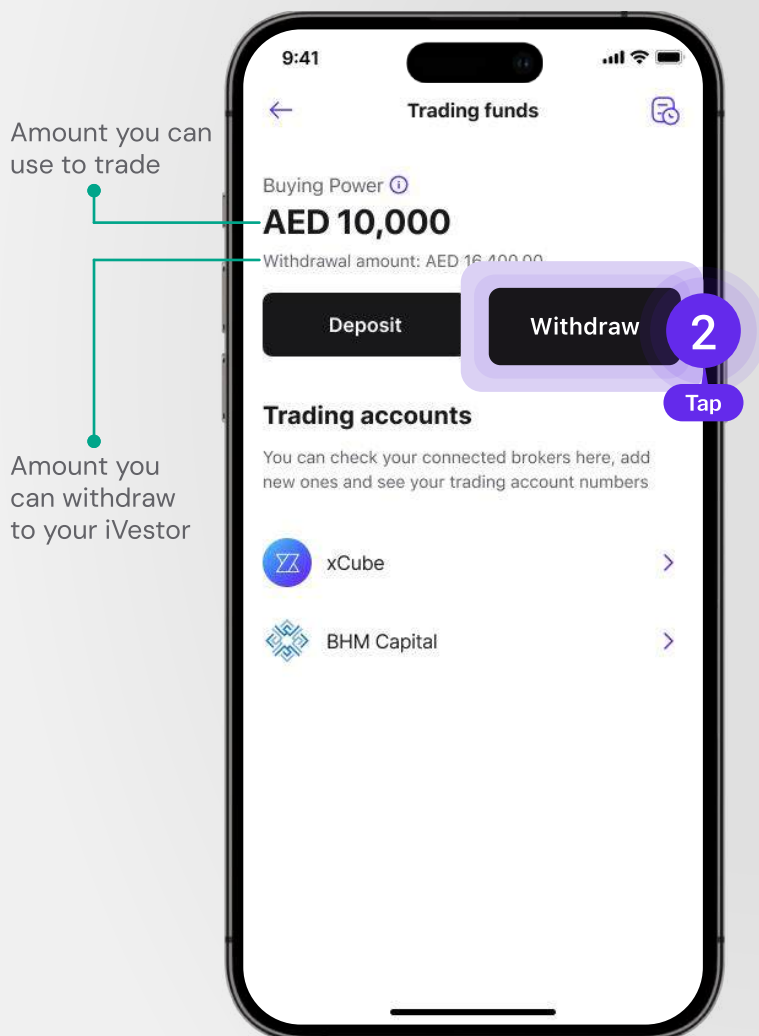
Access your trading balance from the wallet section.

How to Withdraw from Your Trading Fund Account

02.

Select Withdraw

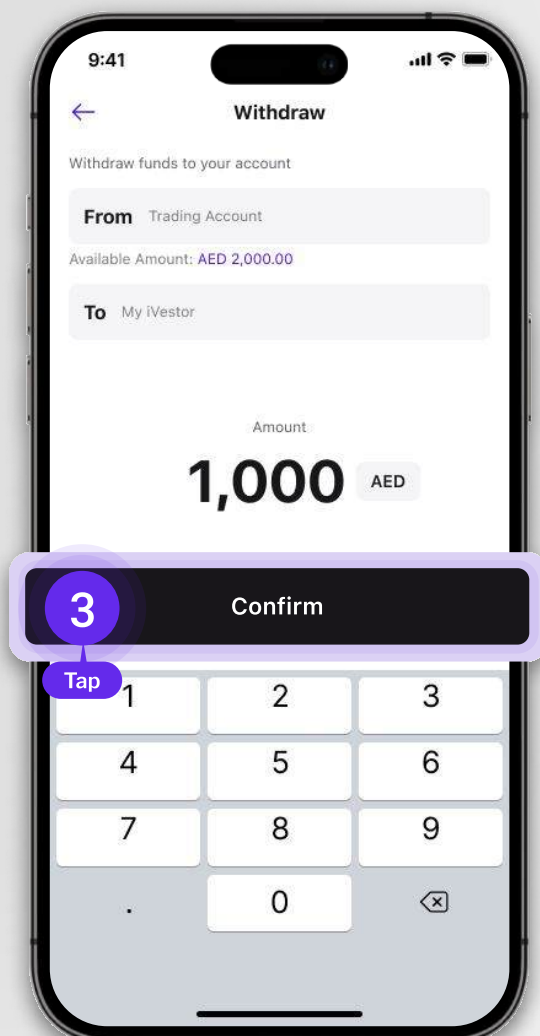
Choose to withdraw money from your trading account.



03.

Enter amount

Input the amount you want to withdraw to your iVestor account.



How to Withdraw from Your Trading Fund Account

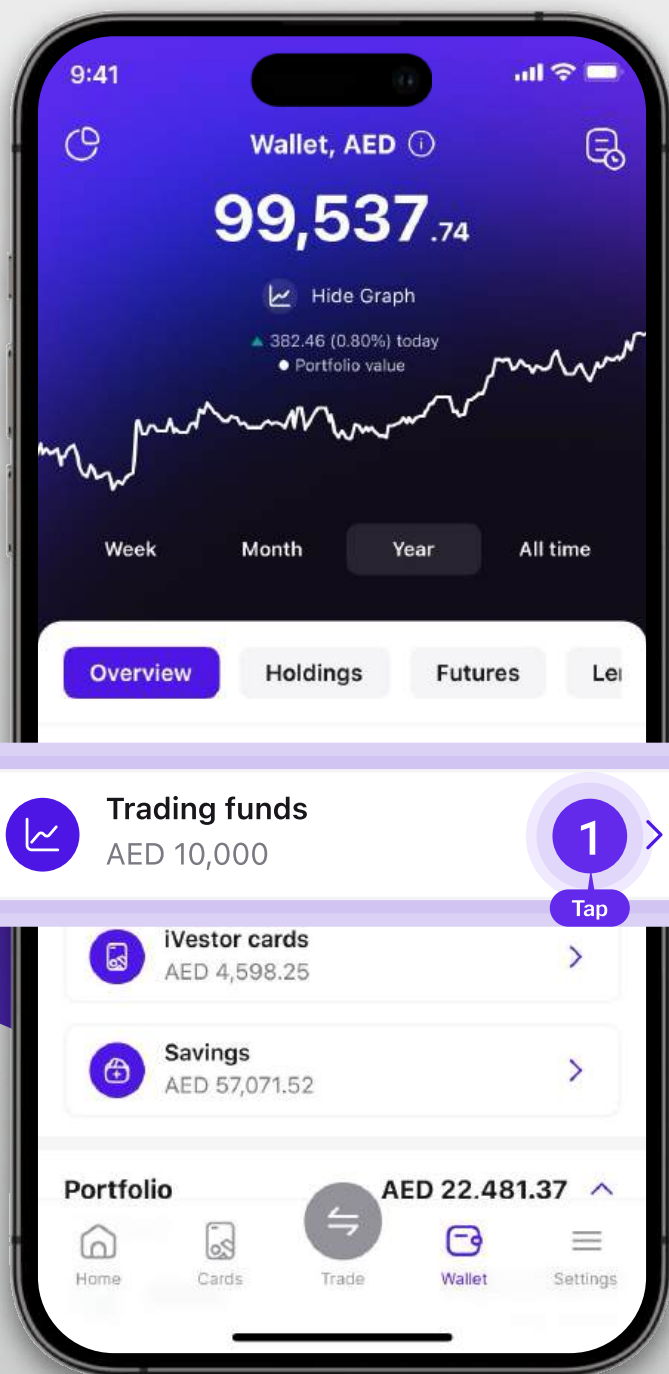
04.

Withdrawal Successful

Your funds have been transferred successfully to your account.



How to View Your Connected Brokers



01.

Open Trading Funds

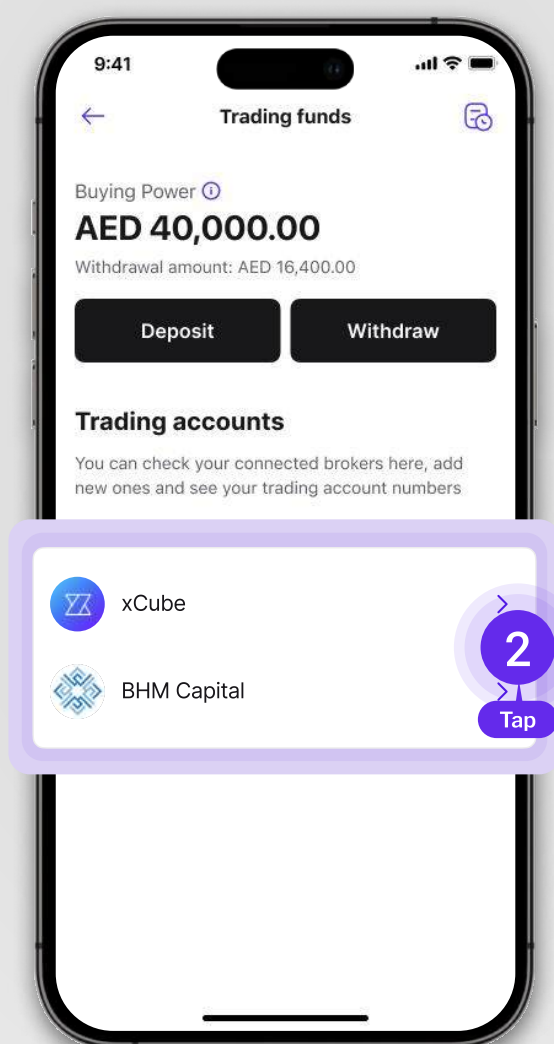
Tap on trading funds from the wallet section.

How to View Your Connected Brokers

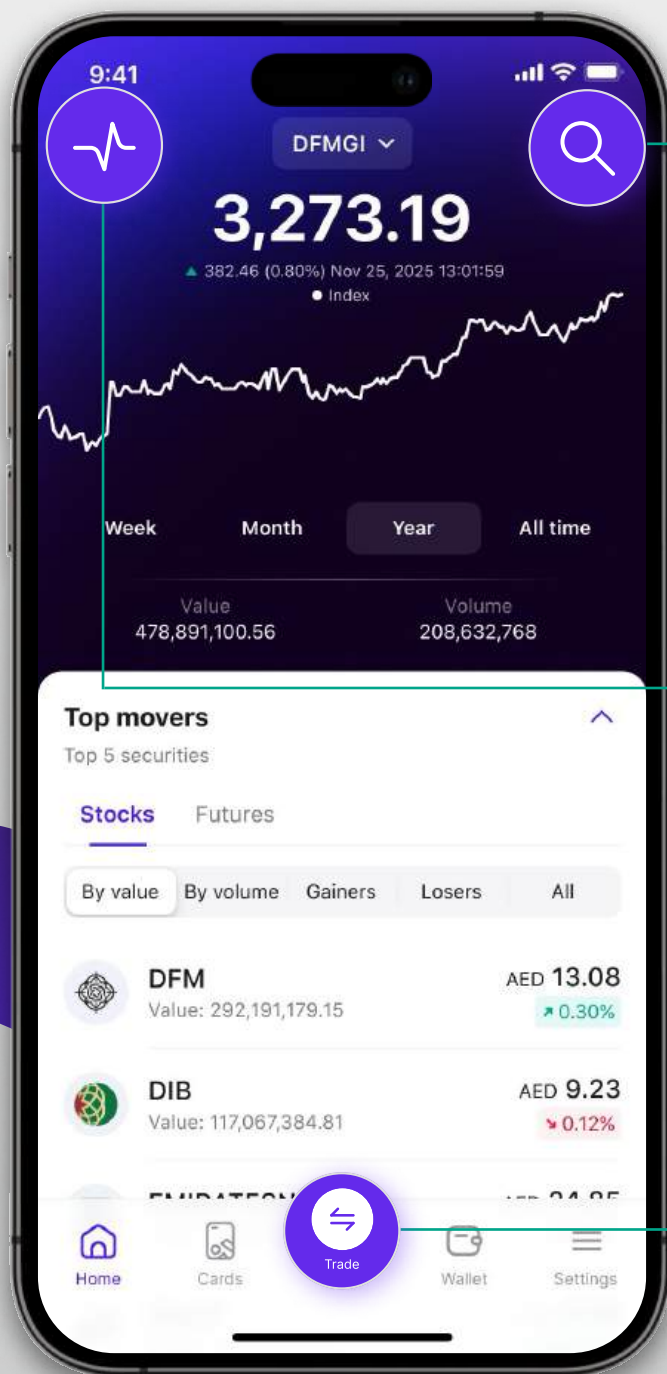
02.

View your Brokers

You will be able to view all your connected brokers.



Homepage: Dashboard Overview



01

Search Page

Search for securities here.

02

Indices Page

View market indices (DFMGI/DFMSI).

03

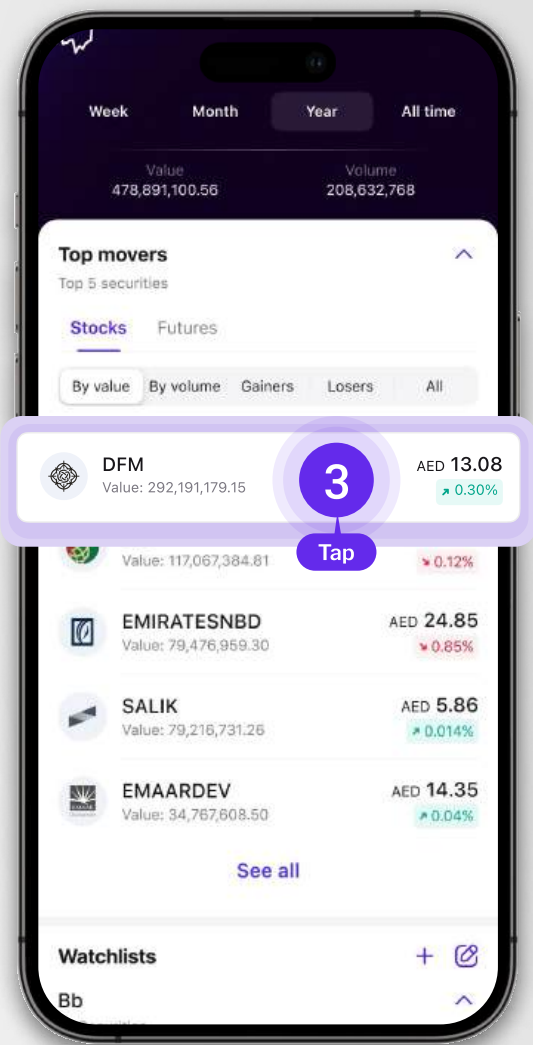
Trading

Start trading DFM securities by clicking this button.

Homepage: Dashboard Overview

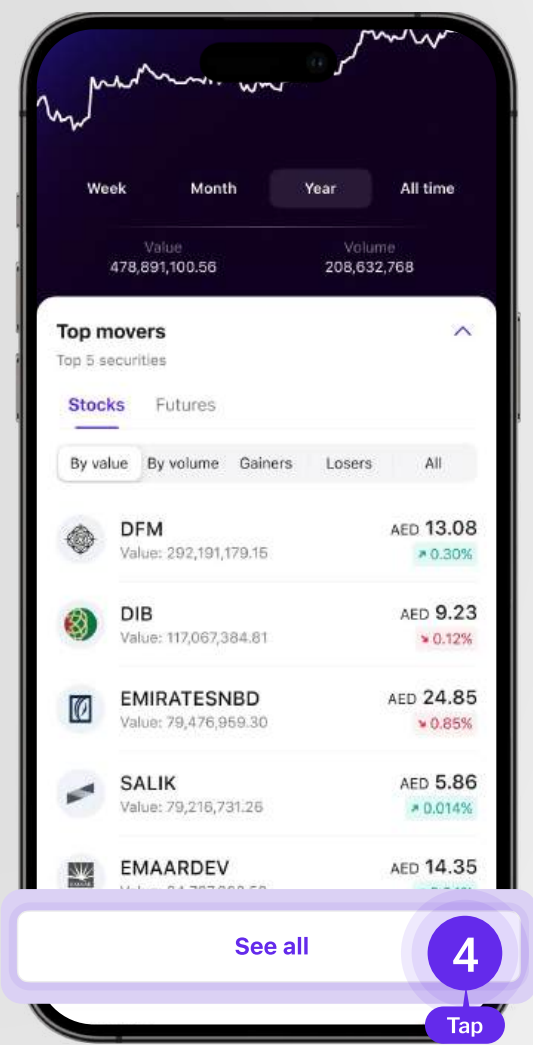
03 . Top Movers

Explore all top gaining and losing securities.



04 . Company Page

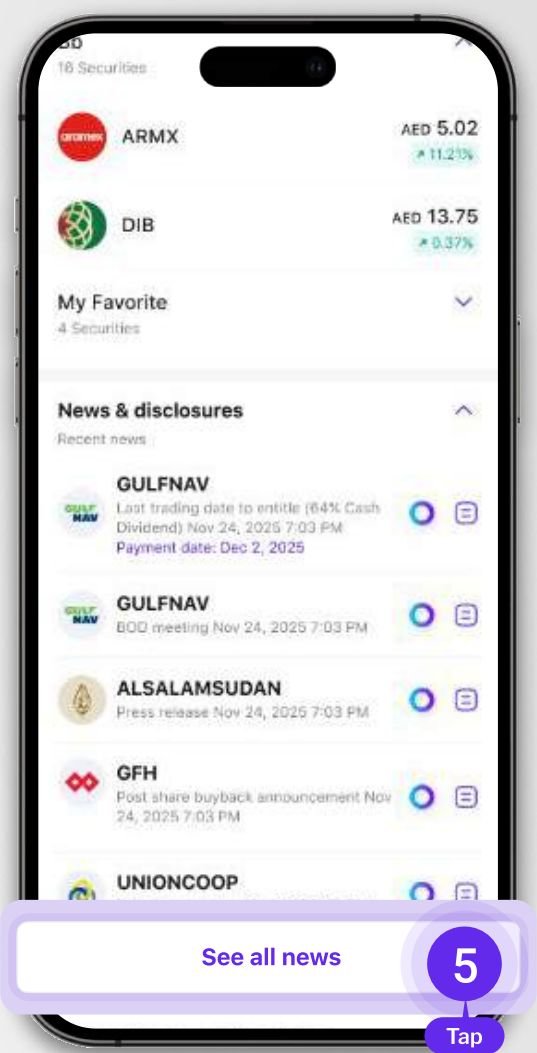
View detailed company performance and trading options.



Homepage: Dashboard Overview

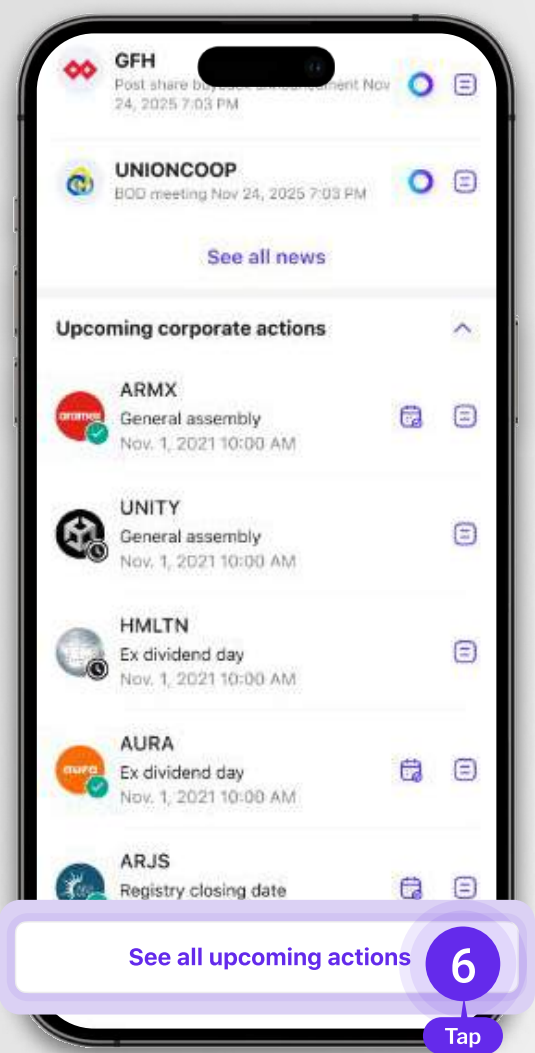
05. All News

View detailed company performance and trading options.



06. Upcoming Corporate Actions

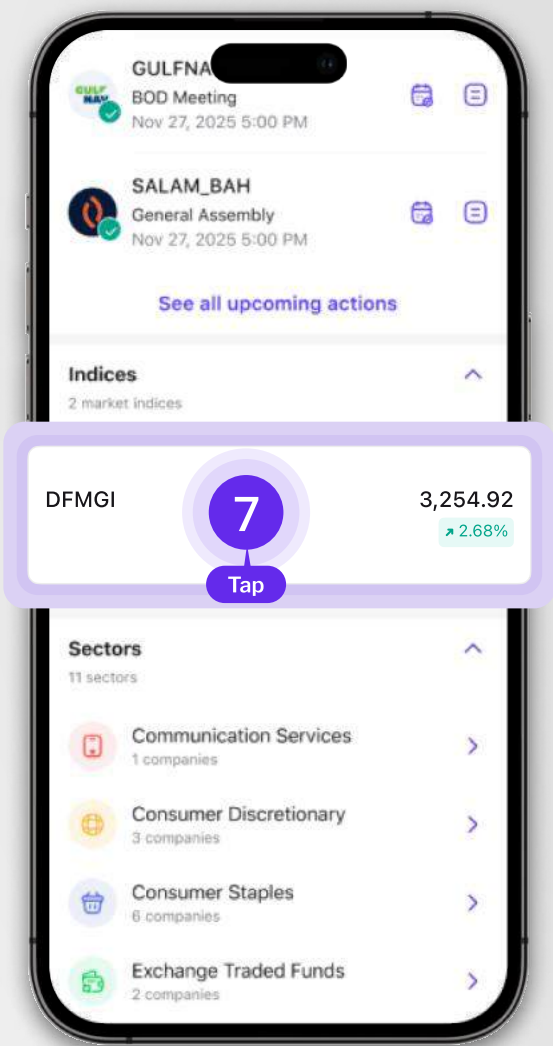
Check upcoming market events.



Homepage: Dashboard Overview

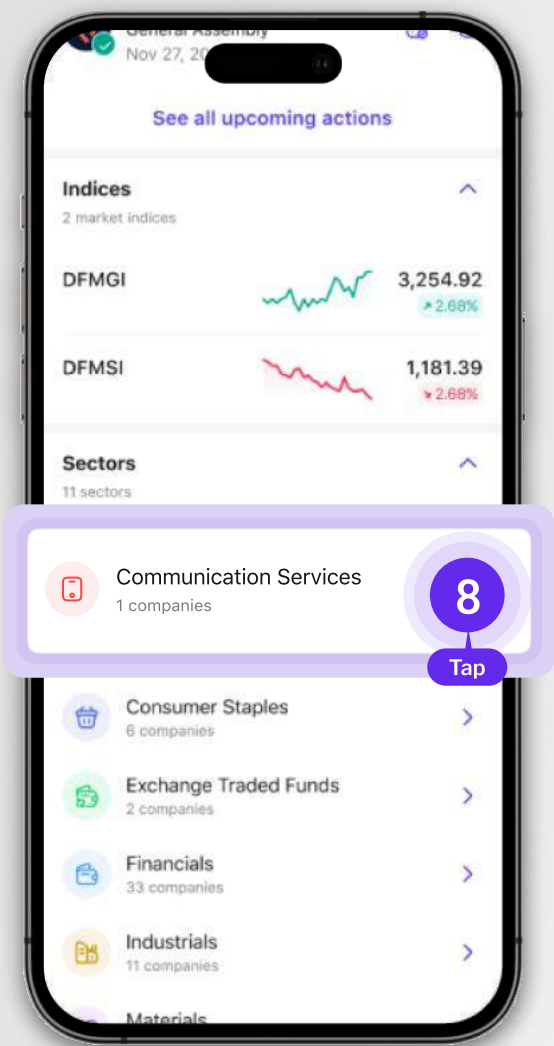
07. Indices

View index performance and insights.

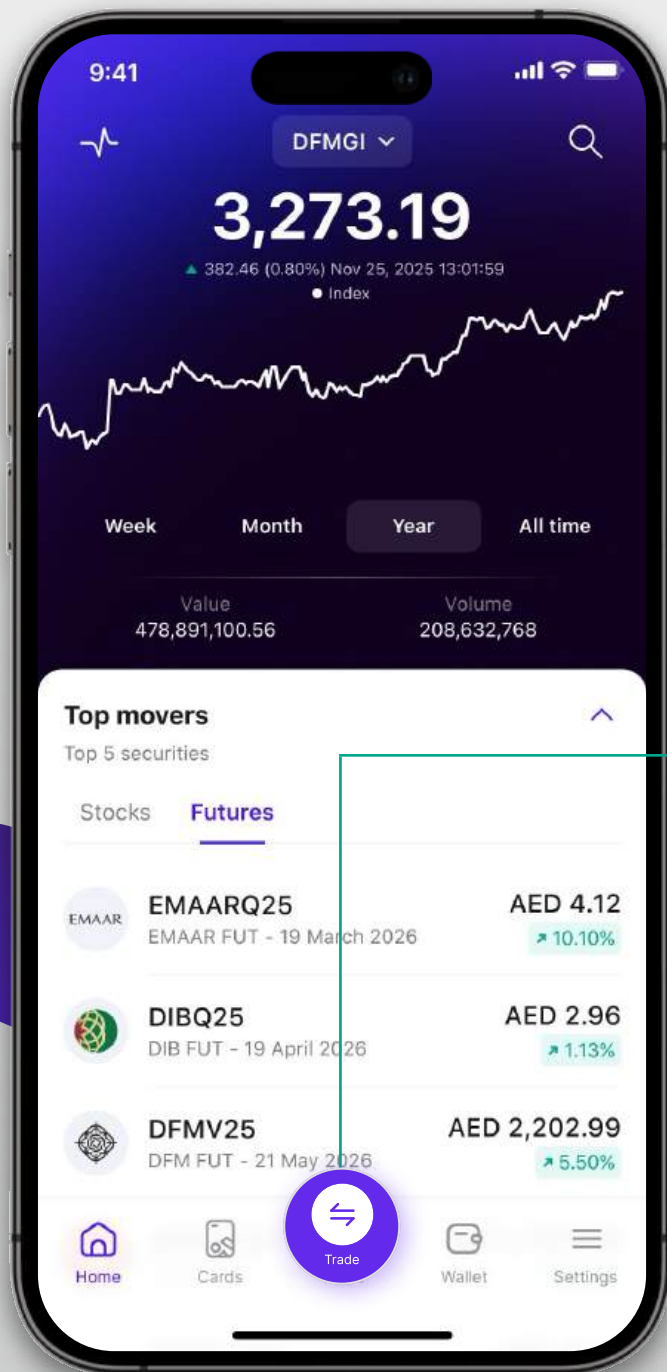


08. Sectors Page

Browse companies by sectors.



How to Trade: How to Buy Shares



01.

Click On Trade Button

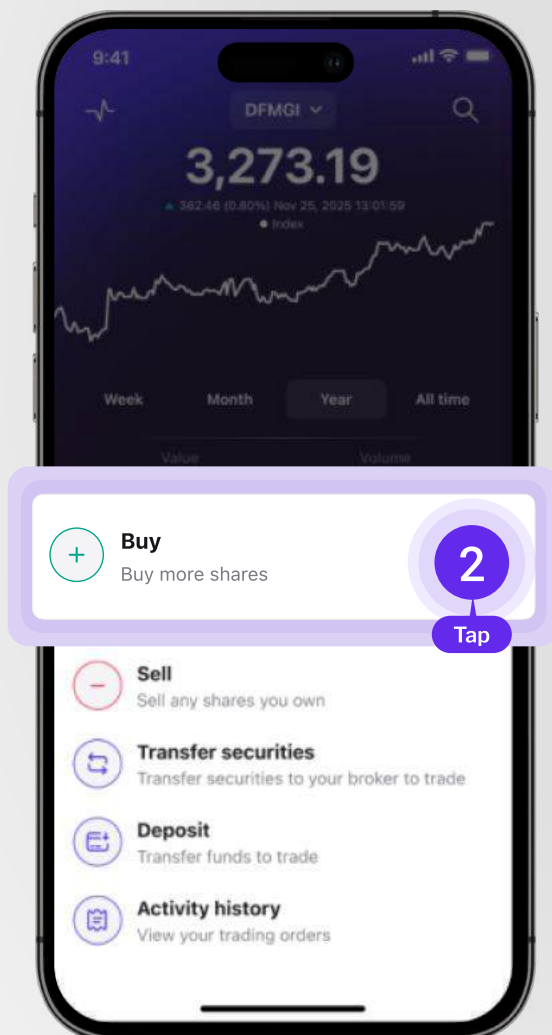
Click here to start trading.

How to Trade: How to Buy Shares

02.

Select Buy

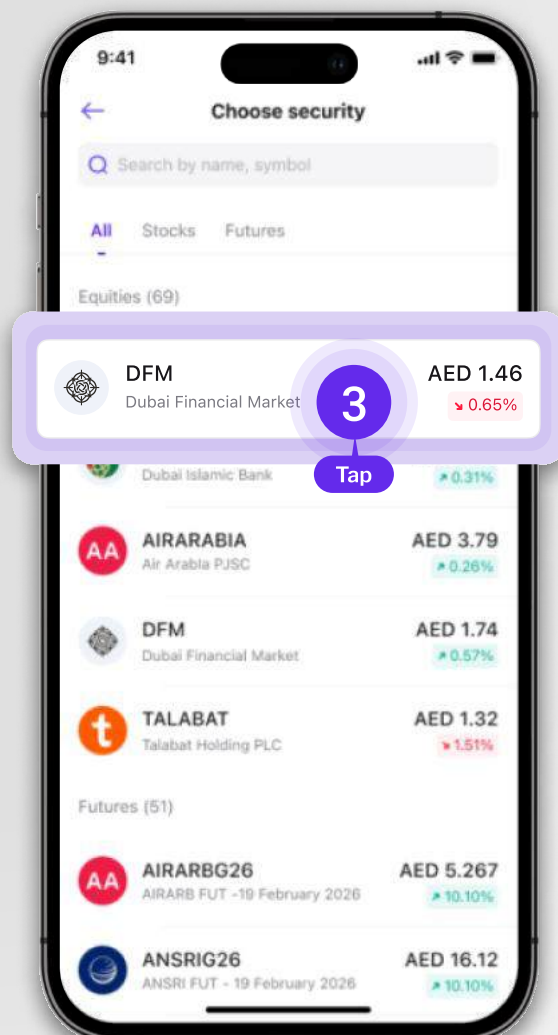
Actions to buy and sell securities, deposit funds to your trading fund account, and view your trading activity history.



03.

Choose Security

Search and select a stock or futures contract to proceed with trading.

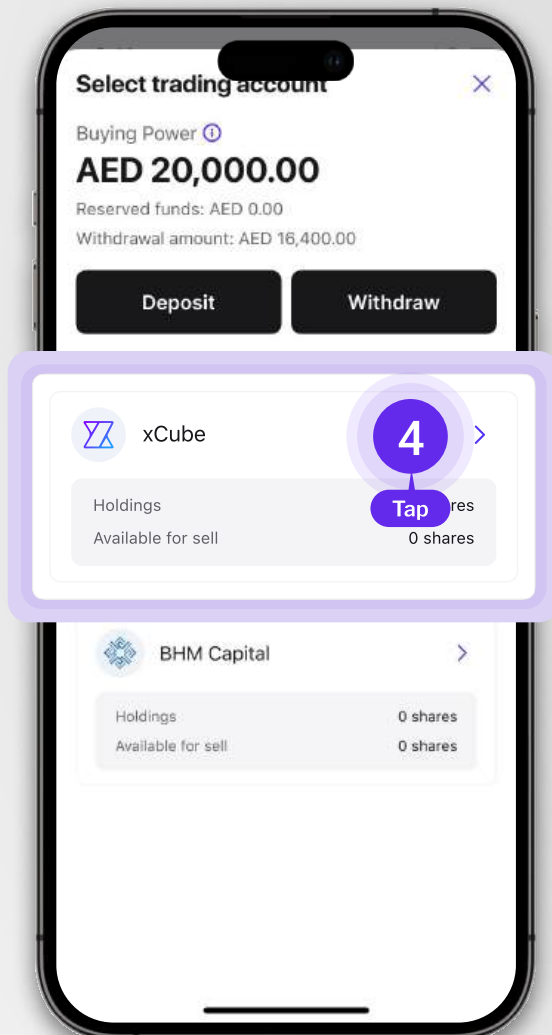


How to Trade: How to Buy Shares

04.

Select Trading Account

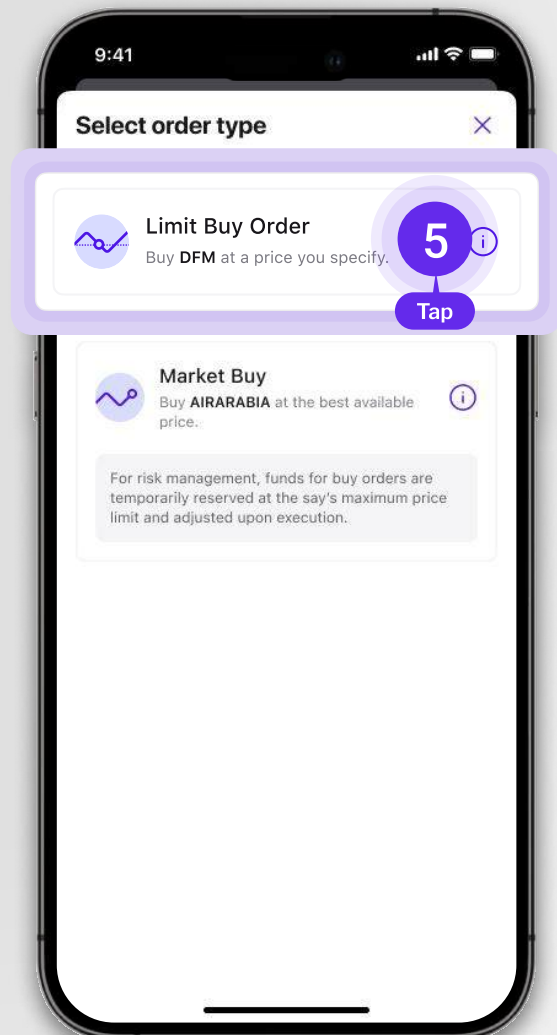
Choose a broker account to trade with and view your existing shares of selected company.



05.

Select Order Type

Choose an order type from below options.

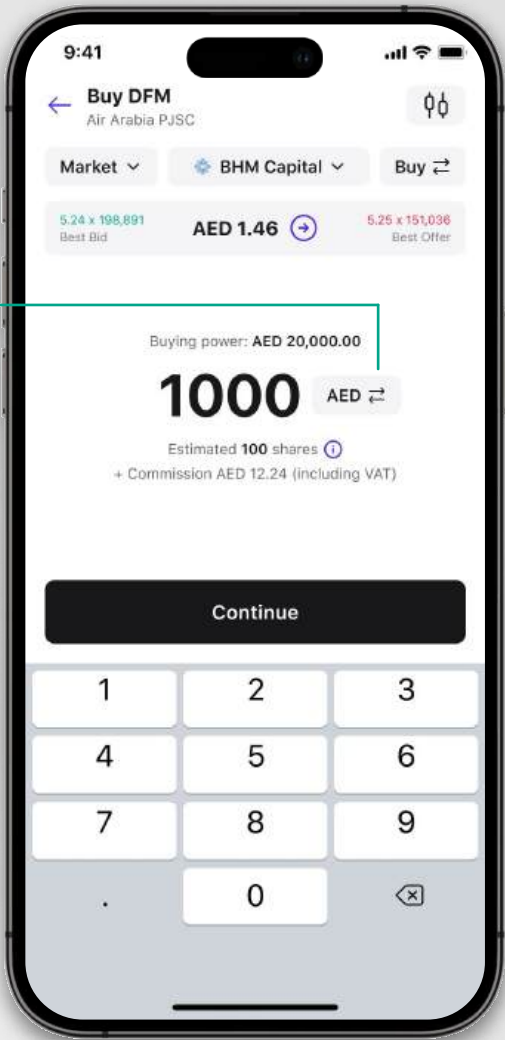


How to Trade: How to Buy Shares

06 . Enter Number Of Shares/ Value (Buy)

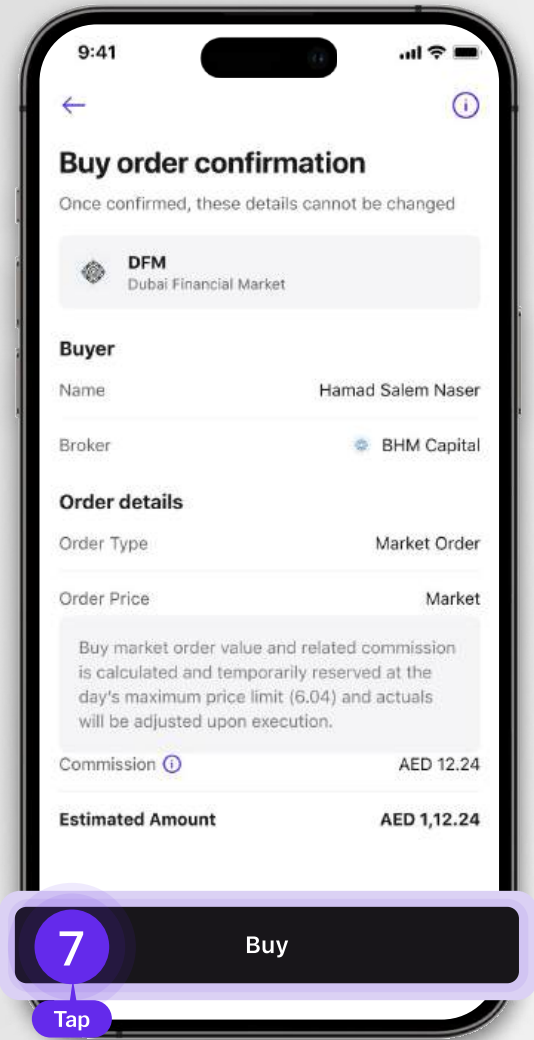
Enter value amount or
number of shares to buy.

Click here to view
in AED or shares.



07 . Review Order

Review and confirm your order
details before final submission.



How to Trade: How to Buy Shares

08.

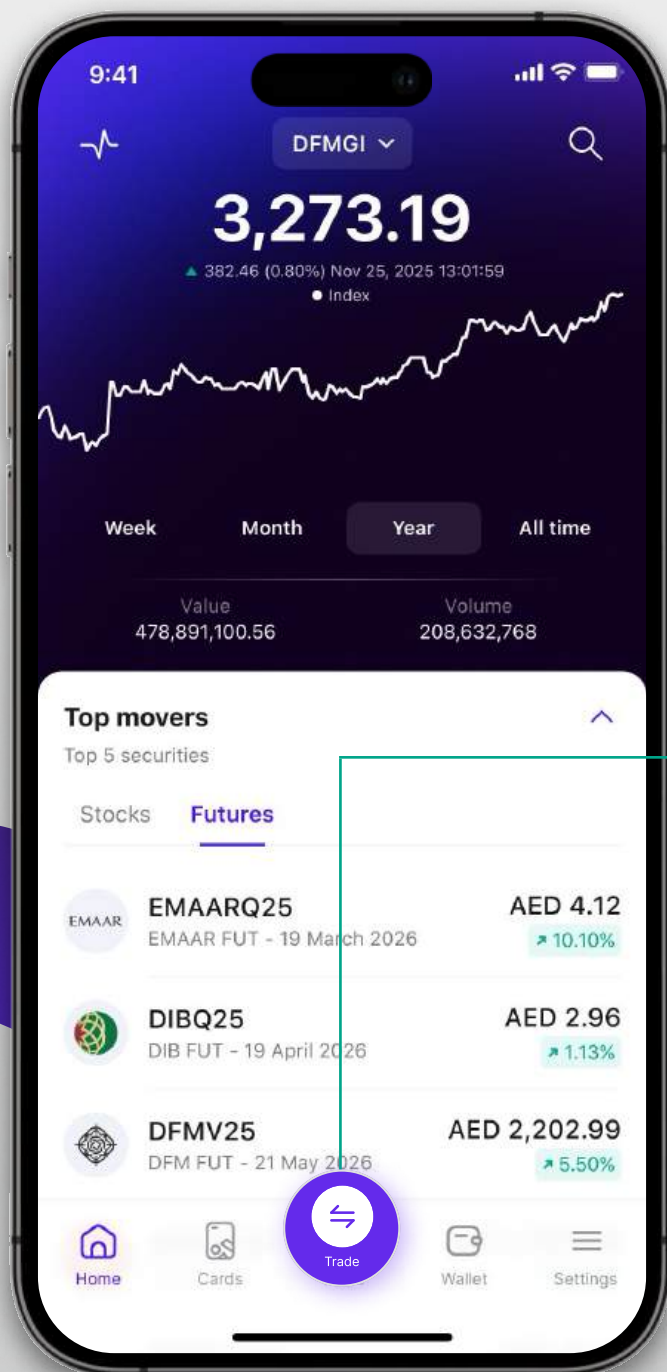
Order Placed Successfully

Confirms your order has been submitted and provides the order reference for tracking.

 "View Order History" to track your trades.



How to Trade: How to Sell Shares



01.

Click On Trade Button

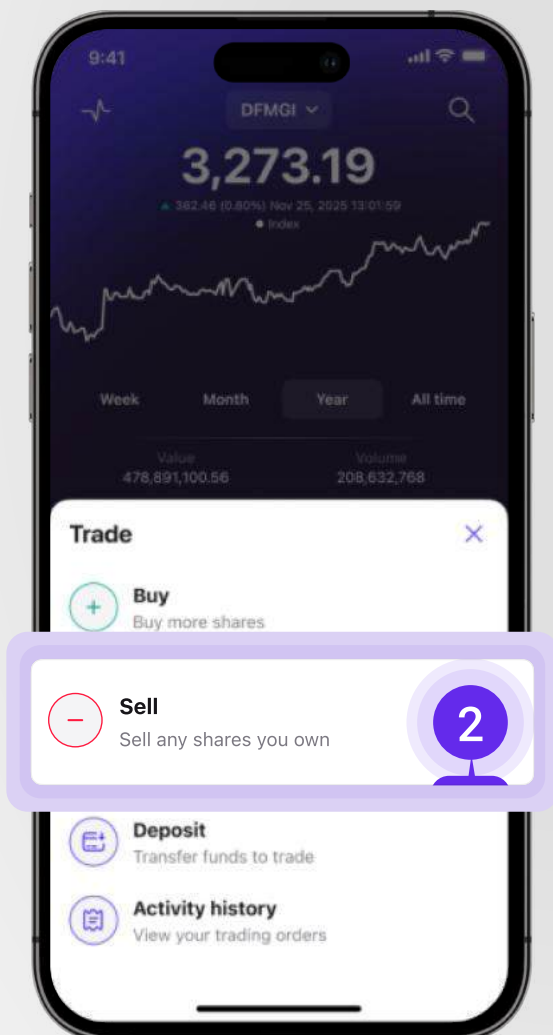
Click here to start trading.

How to Trade: How to Sell Shares

02.

Select Sell

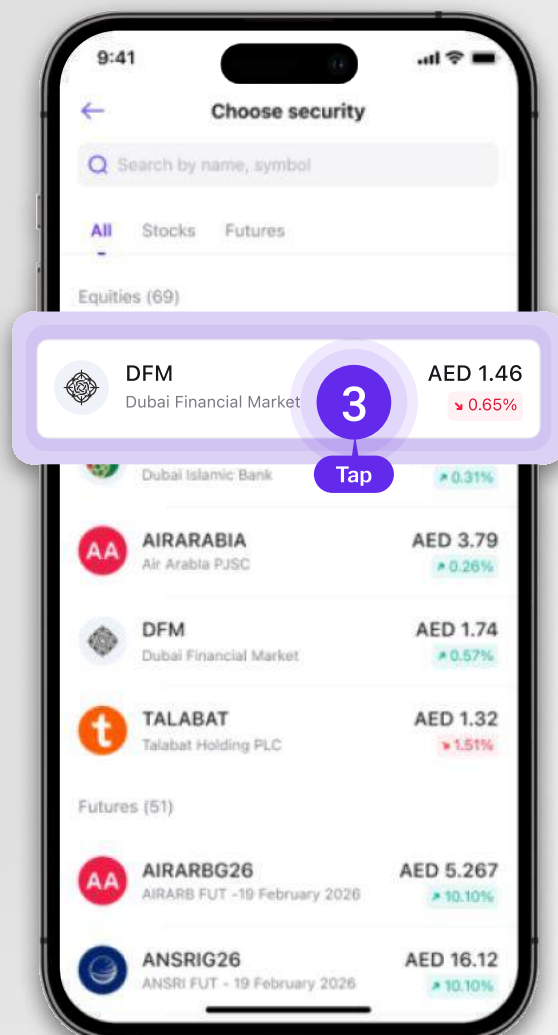
Actions to buy and sell securities, deposit funds to your trading fund account, and view your trading activity history.



03.

Choose Security

Search and select a stock or futures contract to proceed with trading.

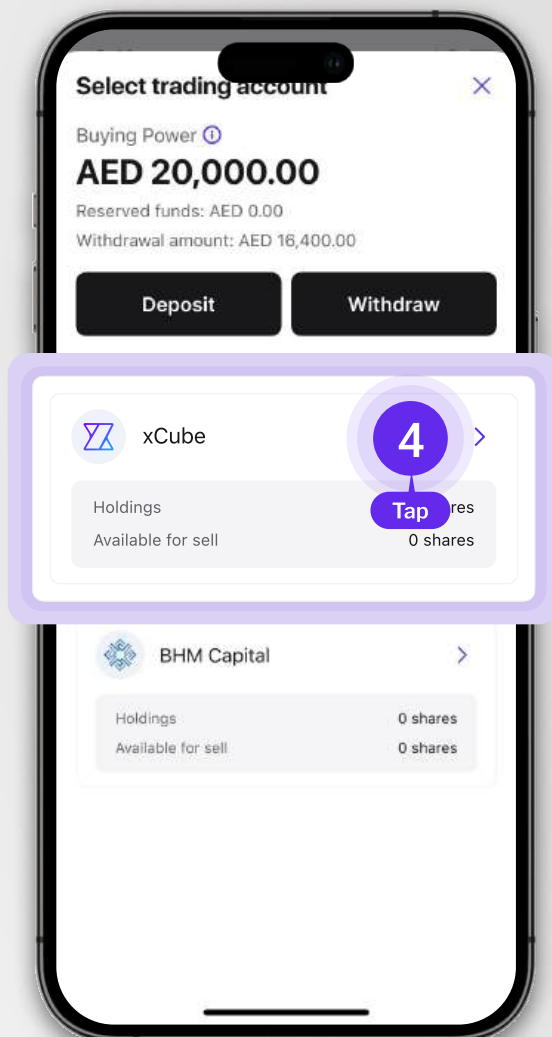


How to Trade: How to Sell Shares

04.

Select Trading Account

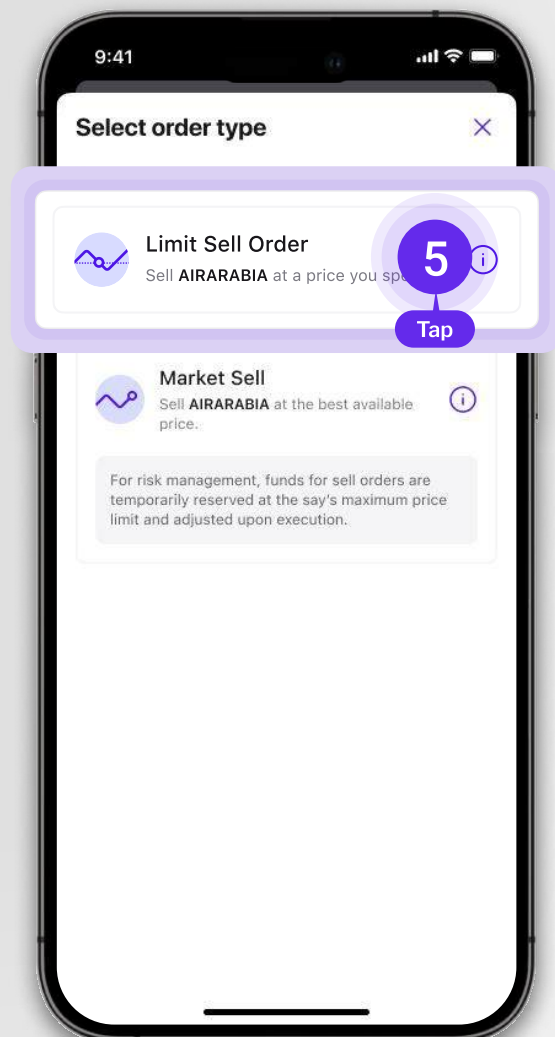
Choose a broker account to trade with and view your existing shares of selected company.



05.

Select Order Type

Choose an order type from below options.

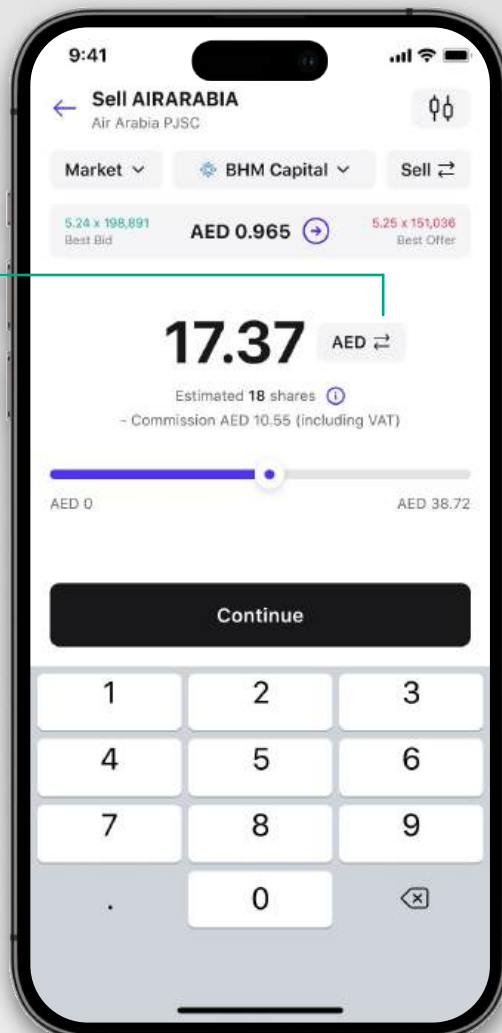


How to Trade: How to Buy & Sell

06 . Enter Number Of Shares/ Value (Sell)

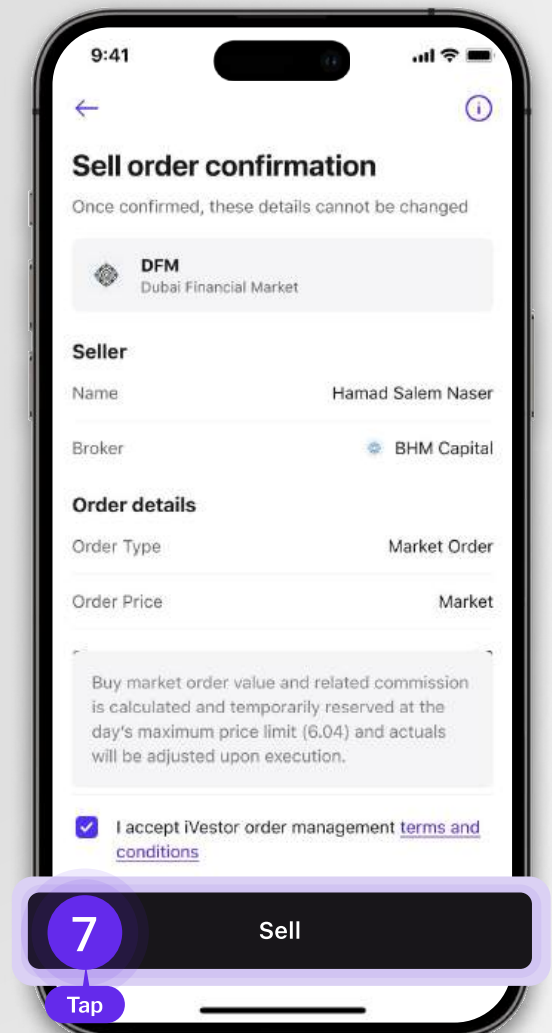
Enter value amount or number of shares to sell.

Click here to view
in AED or shares.



07 . Review Order

"Review and confirm your order details" before final submission, as changes cannot be made afterward.



08.

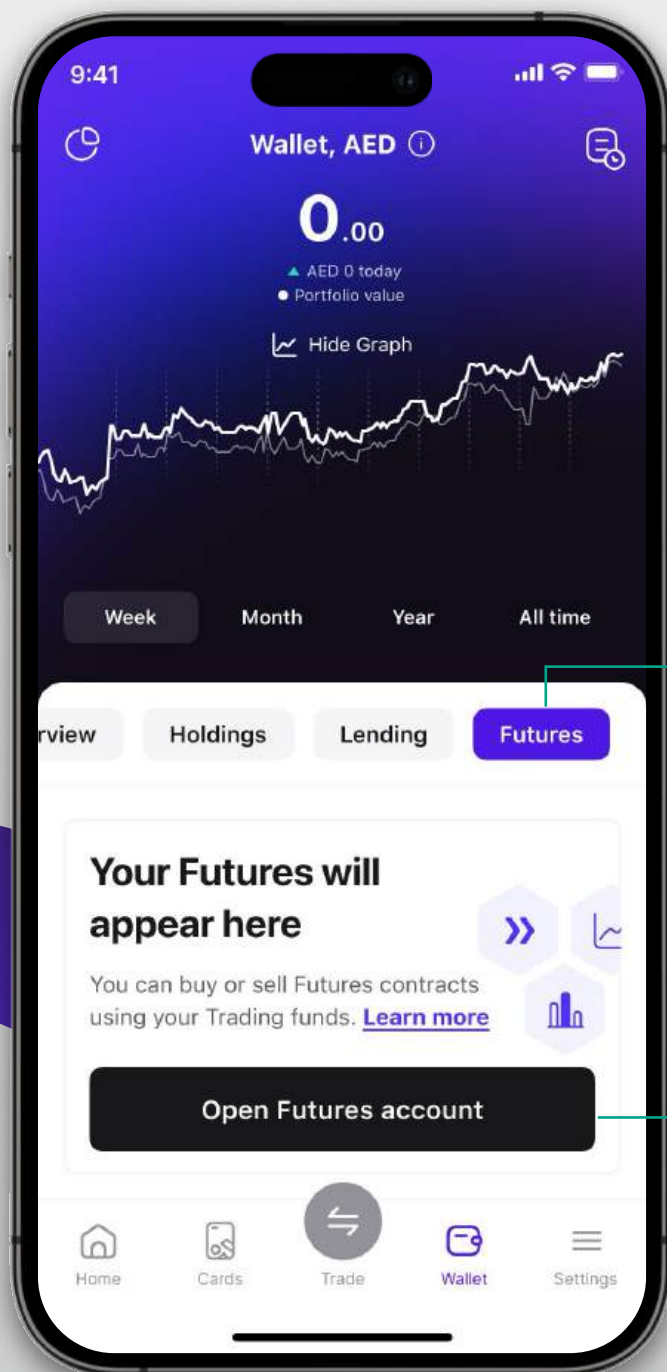
Order Placed Successfully

Confirms your order has been submitted and provides the order reference for tracking.

ⓘ "View Order History" to track your trades.



How to Open a Futures Account



01.

Go to Futures Tab

Access futures trading from your wallet dashboard.

02.

Start Futures Account Setup

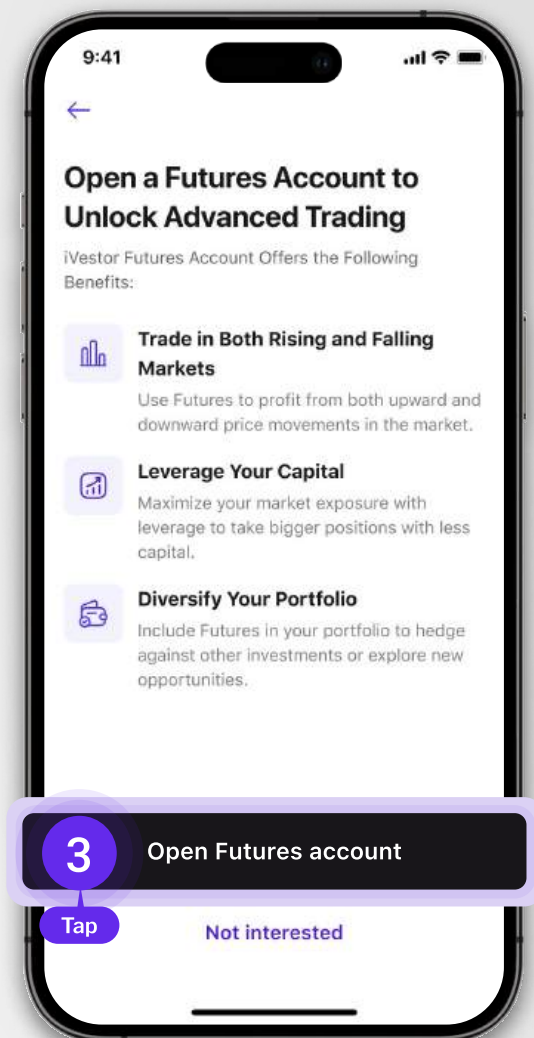
Begin the process to start futures trading.

How to Open a Futures Account

03.

Review Benefits

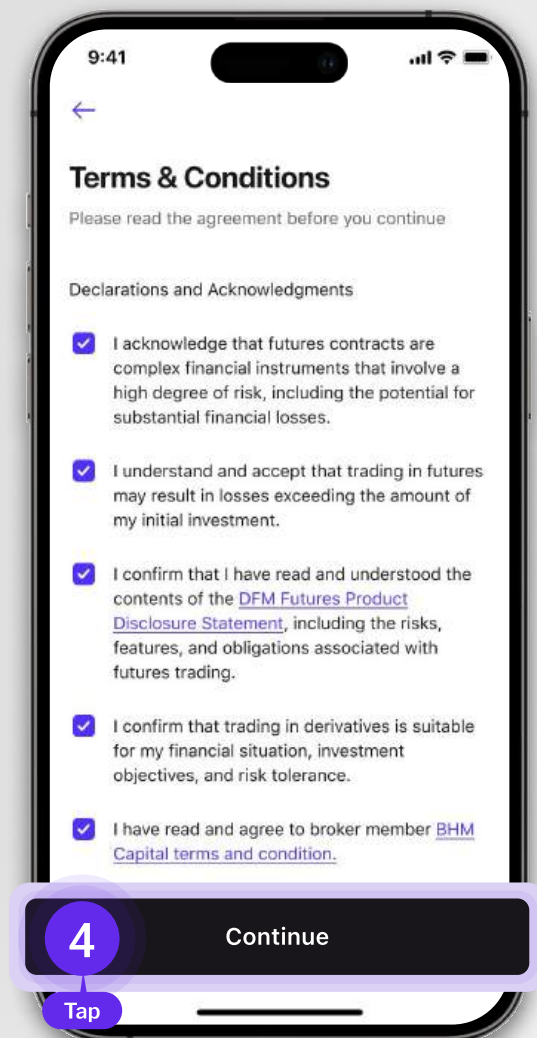
Understand key advantages like leverage and market flexibility.



04.

Accept Terms & Conditions

Review risks and confirm your agreement to proceed.

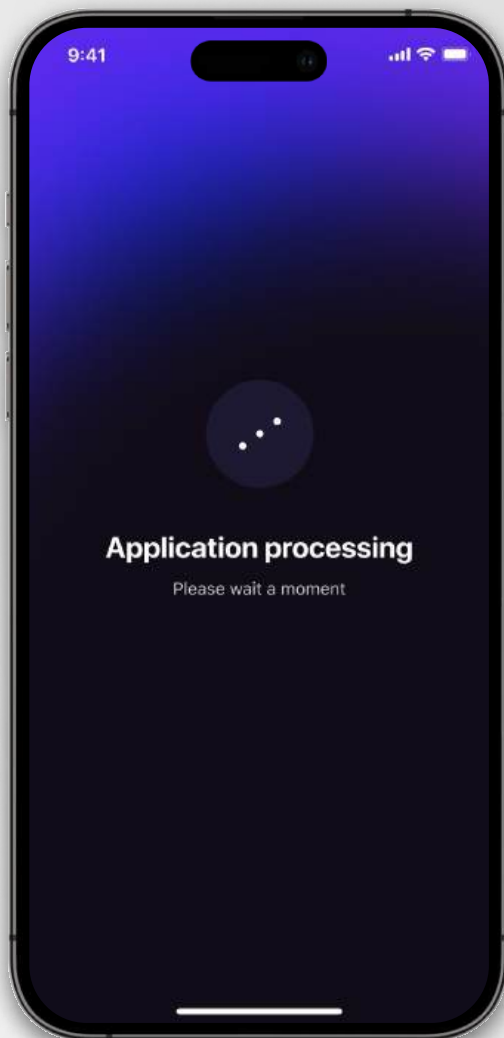


How to Open a Futures Account

05.

Application Processing

Your request is being submitted to the broker.

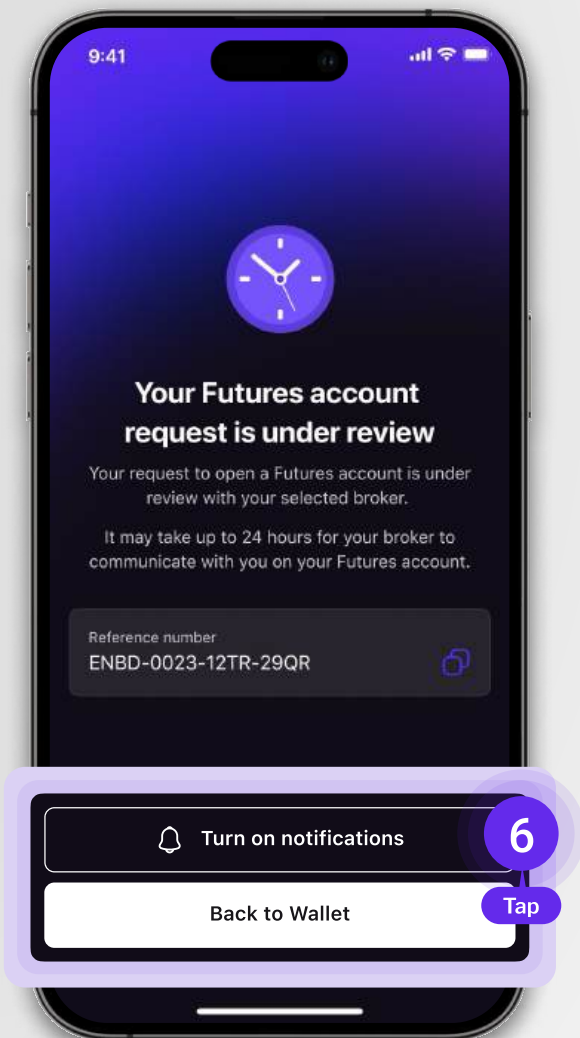


06.

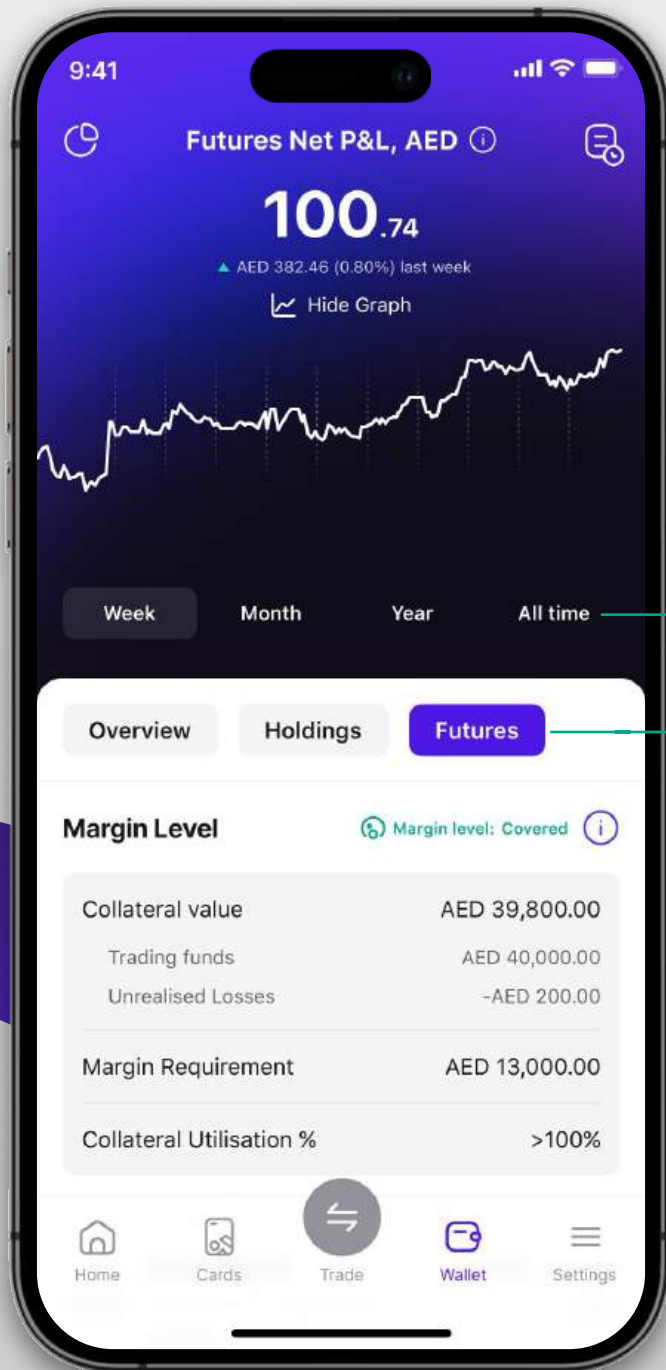
Request Under Review

Your futures account request is under review by the broker.

ⓘ If you have any questions about your account, please reach out to your broker directly.



Futures Dashboard Overview



01 . View Portfolio Performance

Track your total P&L and performance over time.

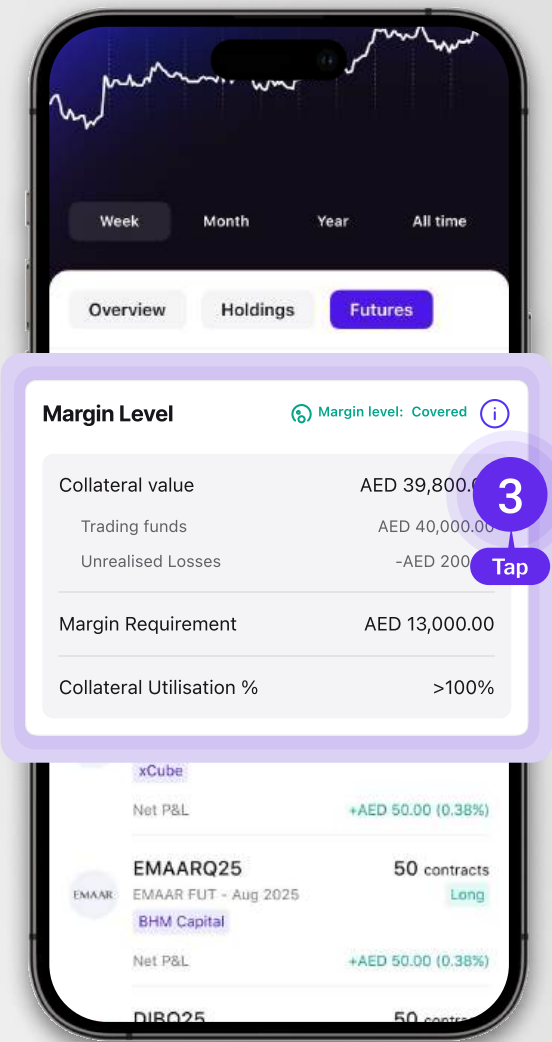
02 . Navigate Dashboard Tabs

Switch between different views to explore your portfolio.

Futures Dashboard Overview

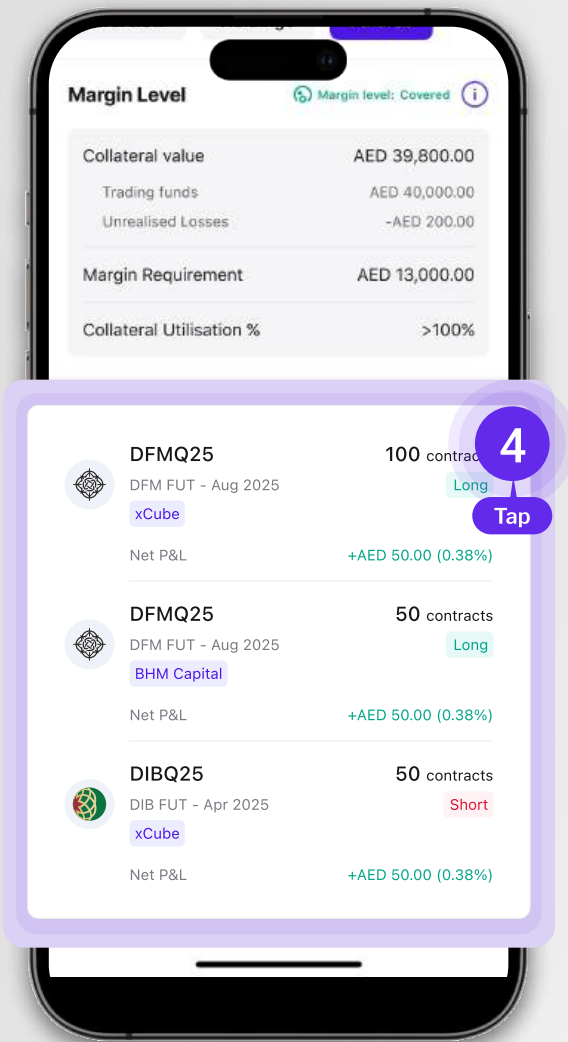
03 . Check Margin Details

Monitor your margin status and trading capacity.



04 . Review Positions List

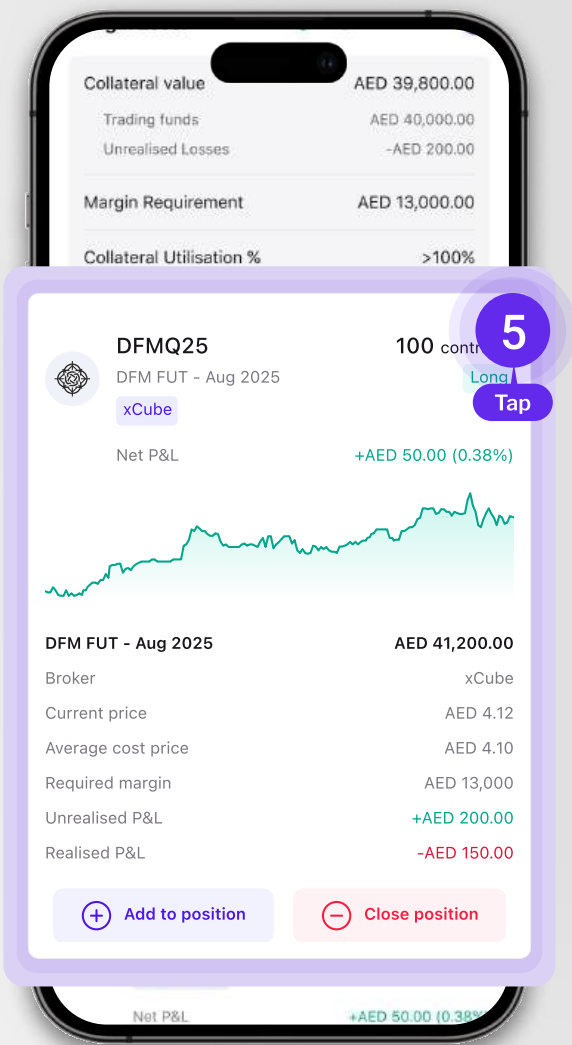
See all your active futures positions in one place.



Futures Dashboard Overview

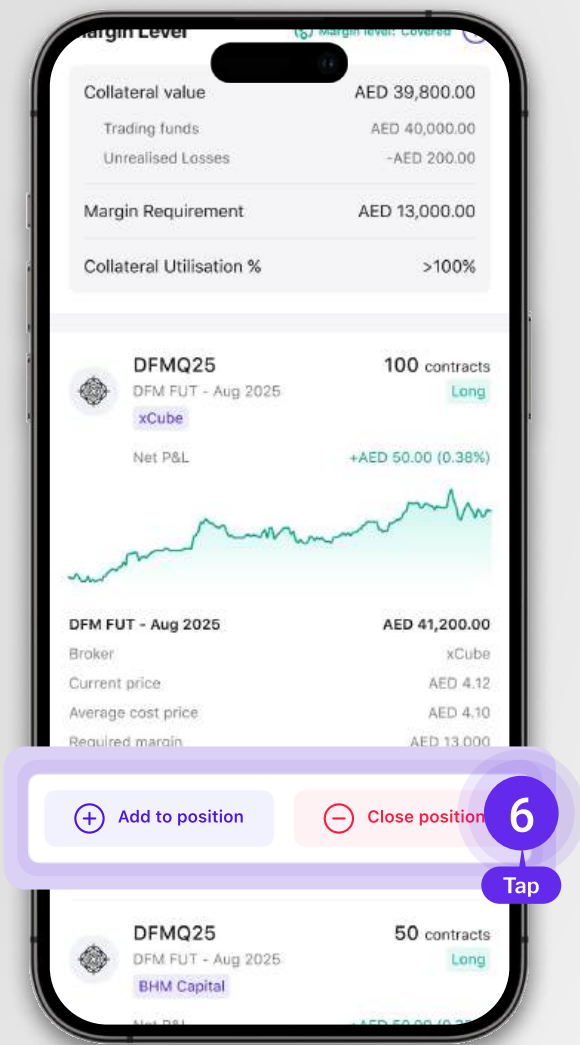
05. Tap company to view details

Get detailed insights for each selected position.

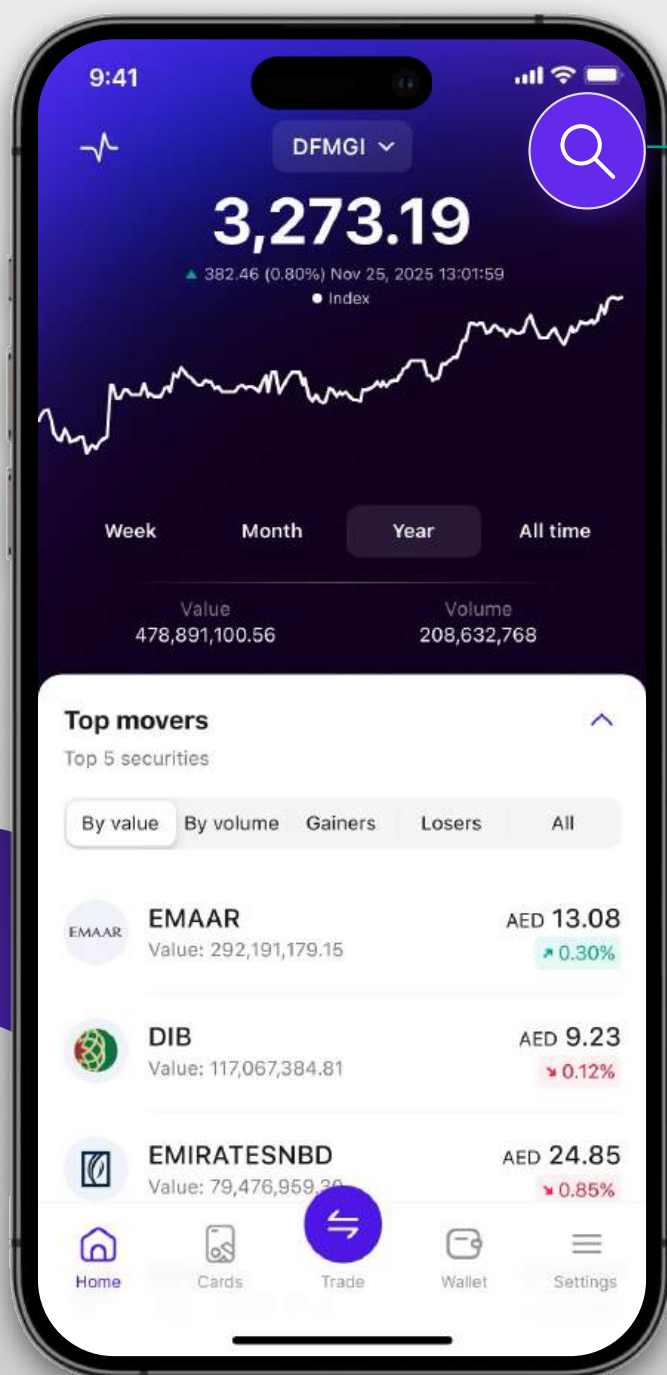


06. Take Action on Position

Add or close your position



How to Trade Futures



01 .

Search for Futures

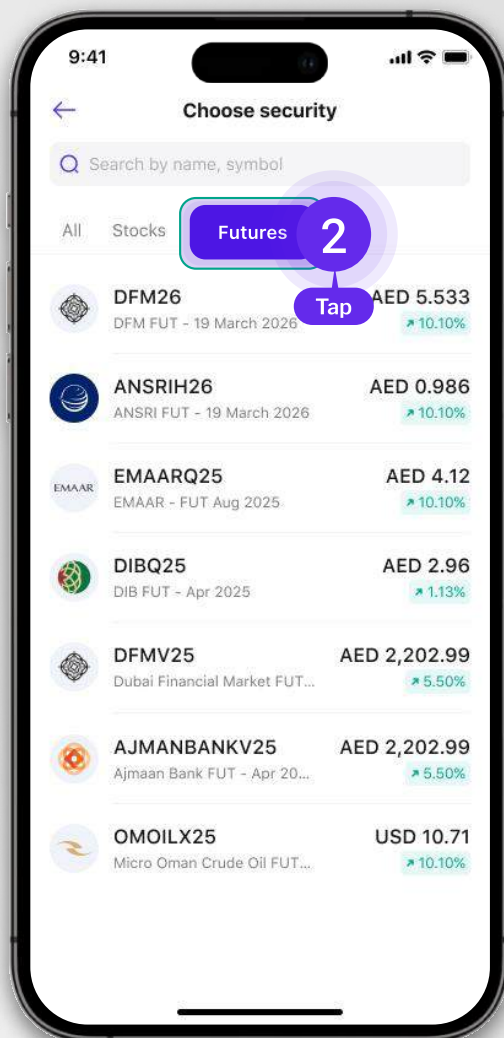
Find available futures contracts from the market screen.

How to Trade Futures

02.

Select a Future Contract

Choose the contract you want to trade.



03.

Choose Trade Type

Decide whether to buy (Long) or sell (Short).

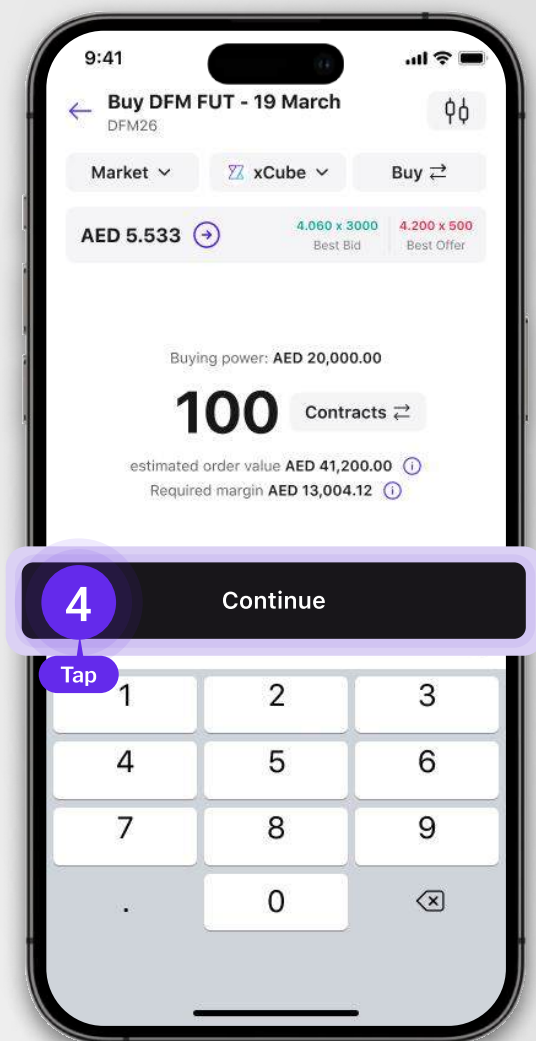


How to Trade Futures

04.

Enter Trade Details

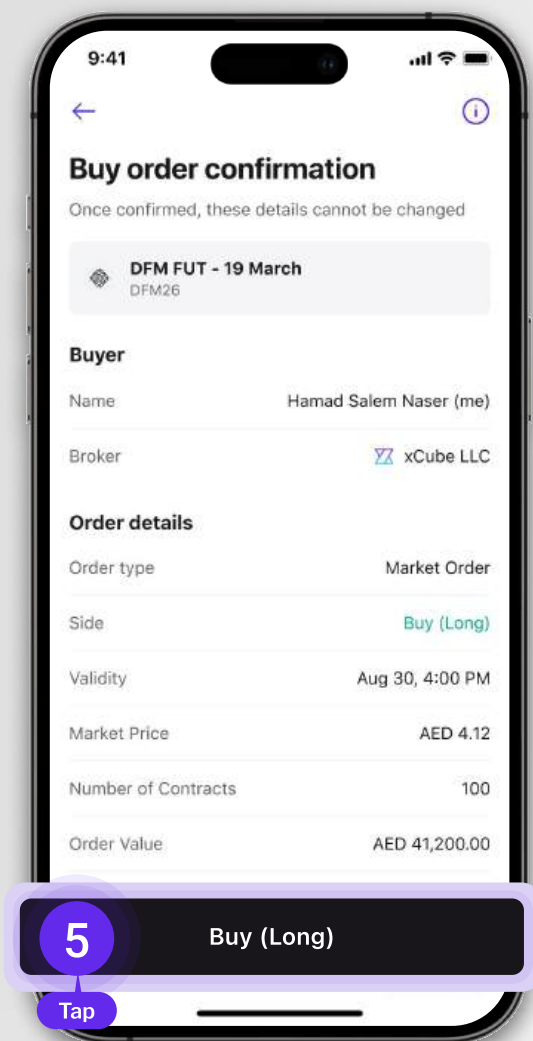
Input the number of contracts or total value.



05.

Review Order

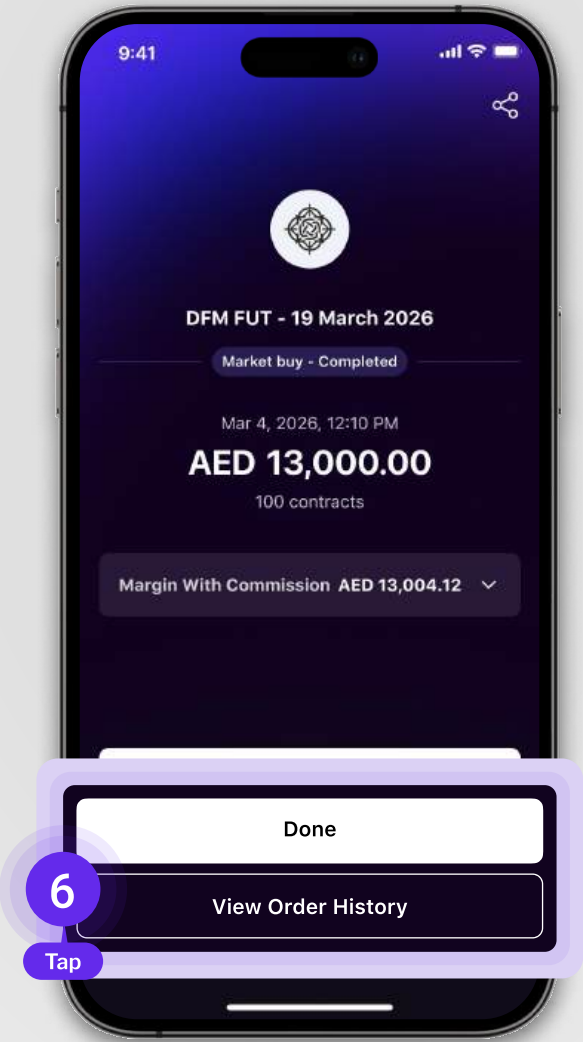
Check all trade details before placing your order.



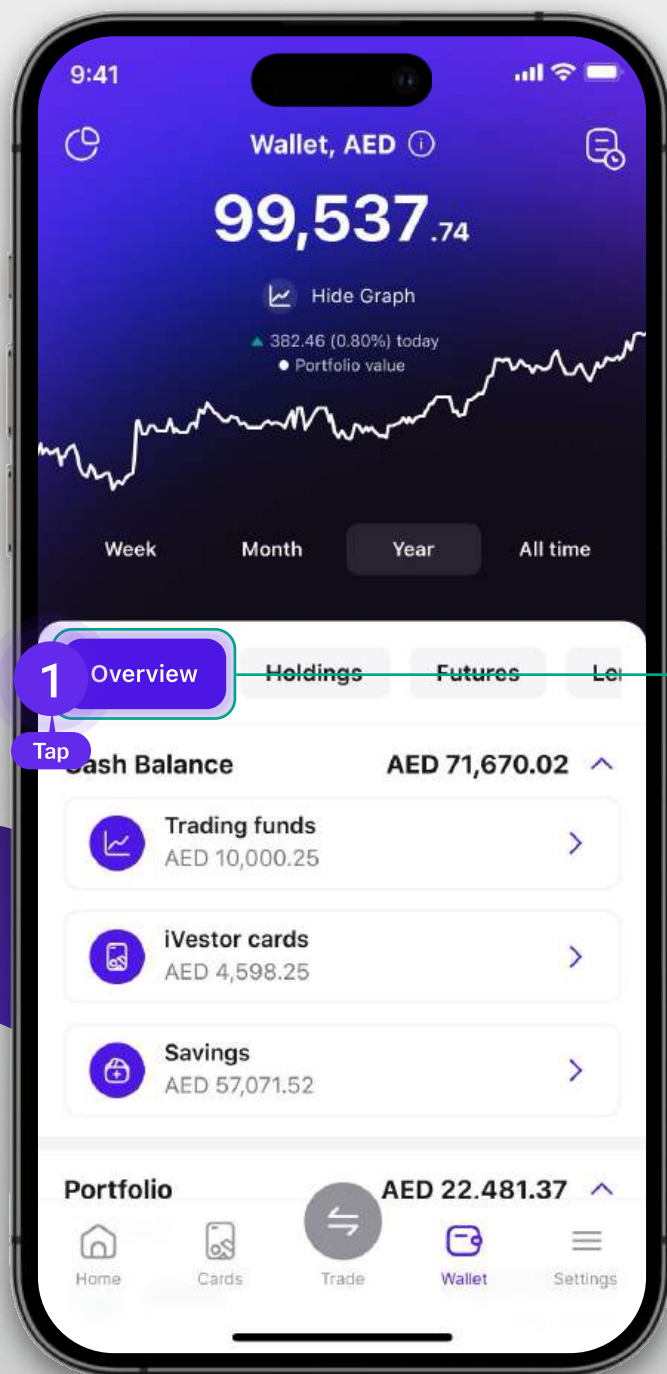
06 .

Order Placed Successfully

Confirms your order has been submitted and provides the order reference for tracking.



Portfolio & Holdings Overview (Wallet)



01 .

Click On Overview Tab

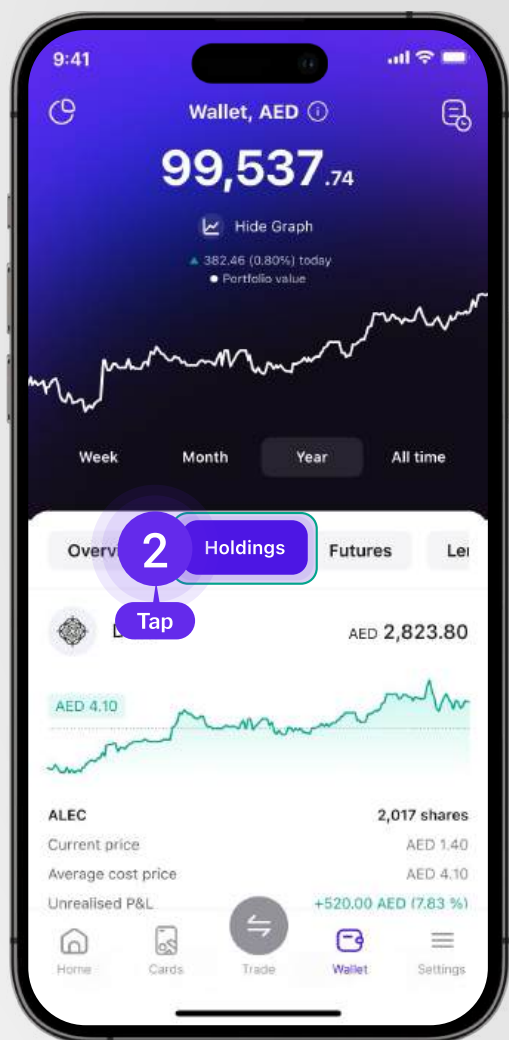
View your total cash balance and your portfolio.

Portfolio & Holdings Overview (Wallet)

02 . Click On Holdings Tab

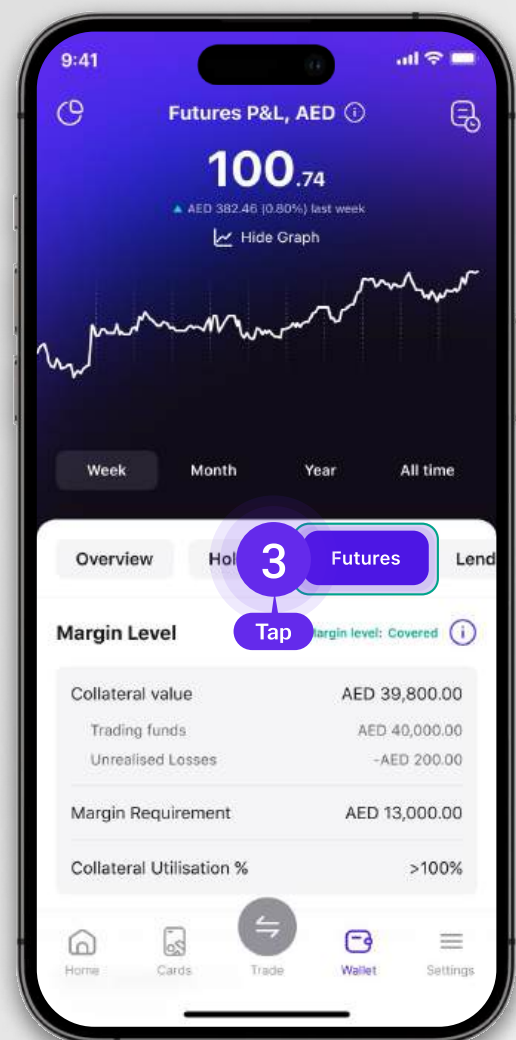
View all your owned securities in one place and monitor the progress.

 Unrealised P&L helps you identify how much profit or loss you made.

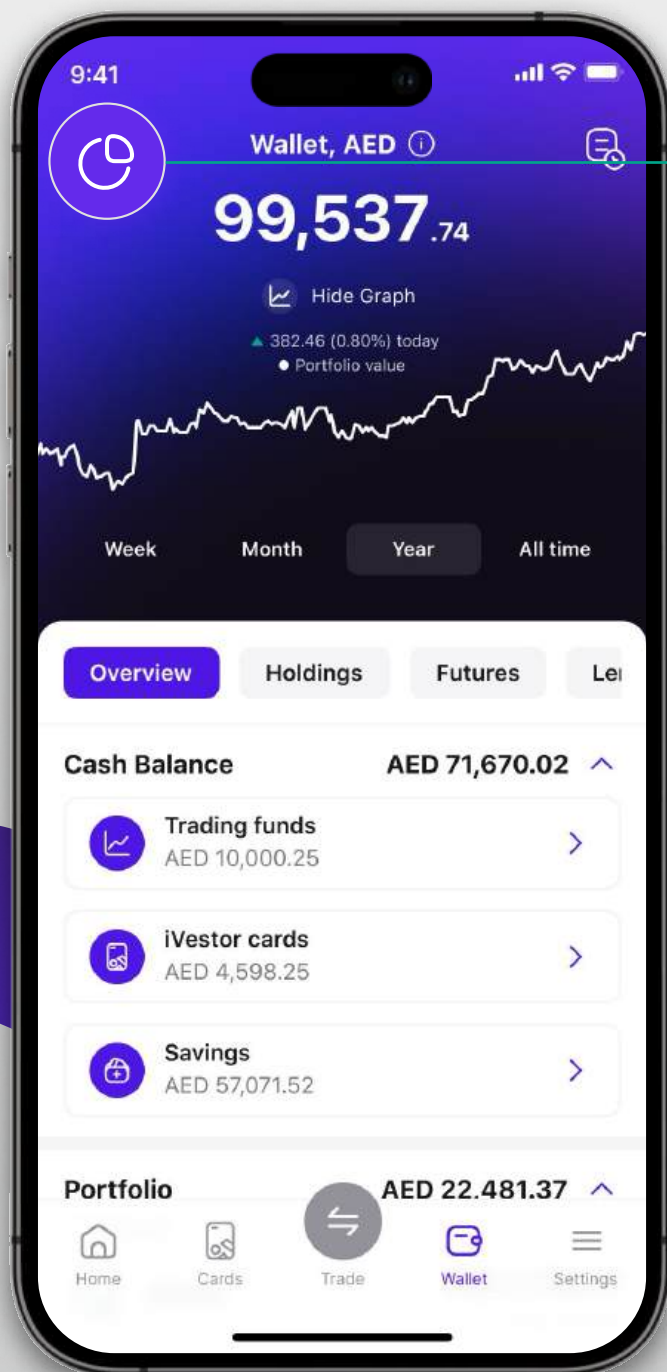


03 . Click On Futures Tab

View your futures profit & loss, margin level, collateral details, and open positions summary.



How to View Your Investment Distribution



01 .

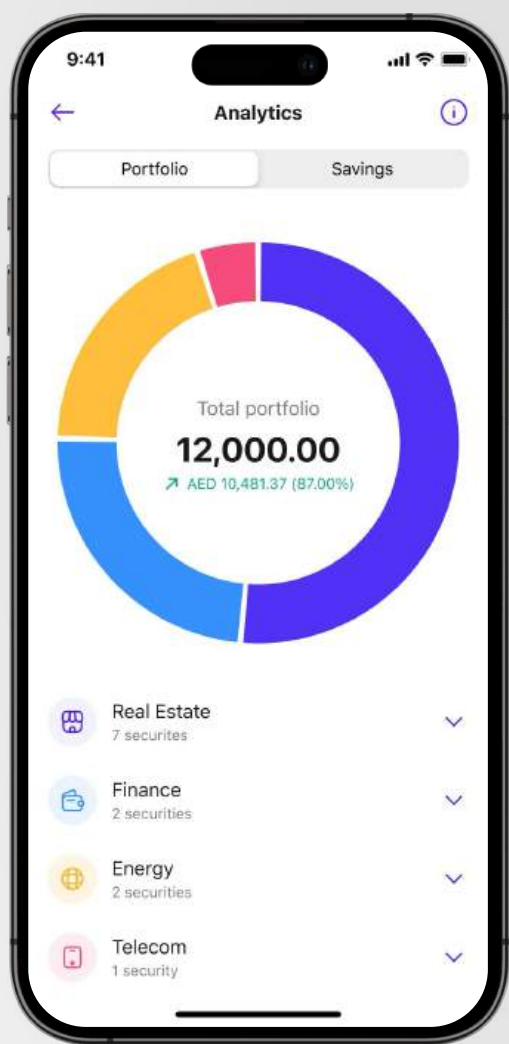
View your investments

View all of your distribution of investment.

How to View Your Investment Distribution

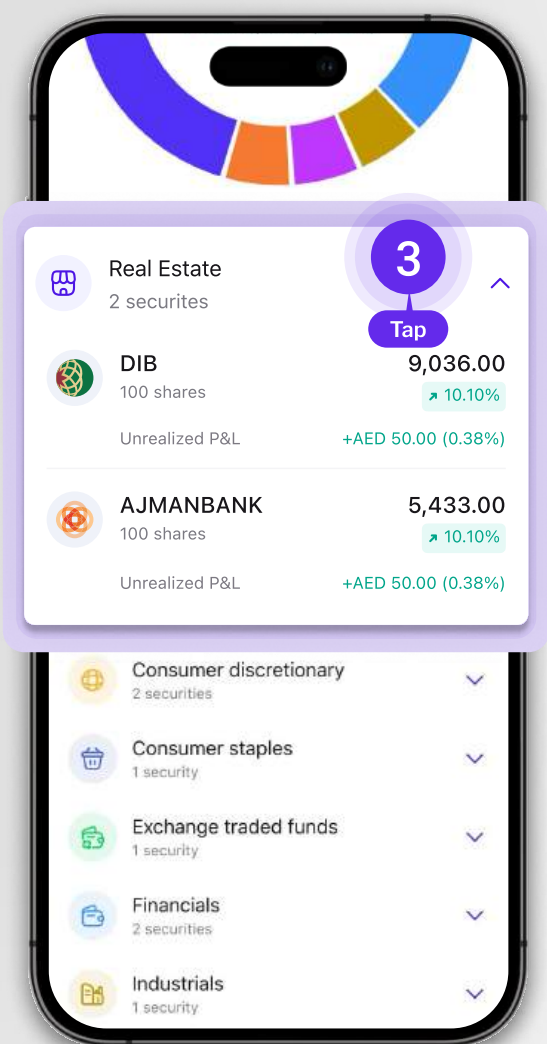
02 .
View Investments
Category

Here you can see all of your Investments Category.

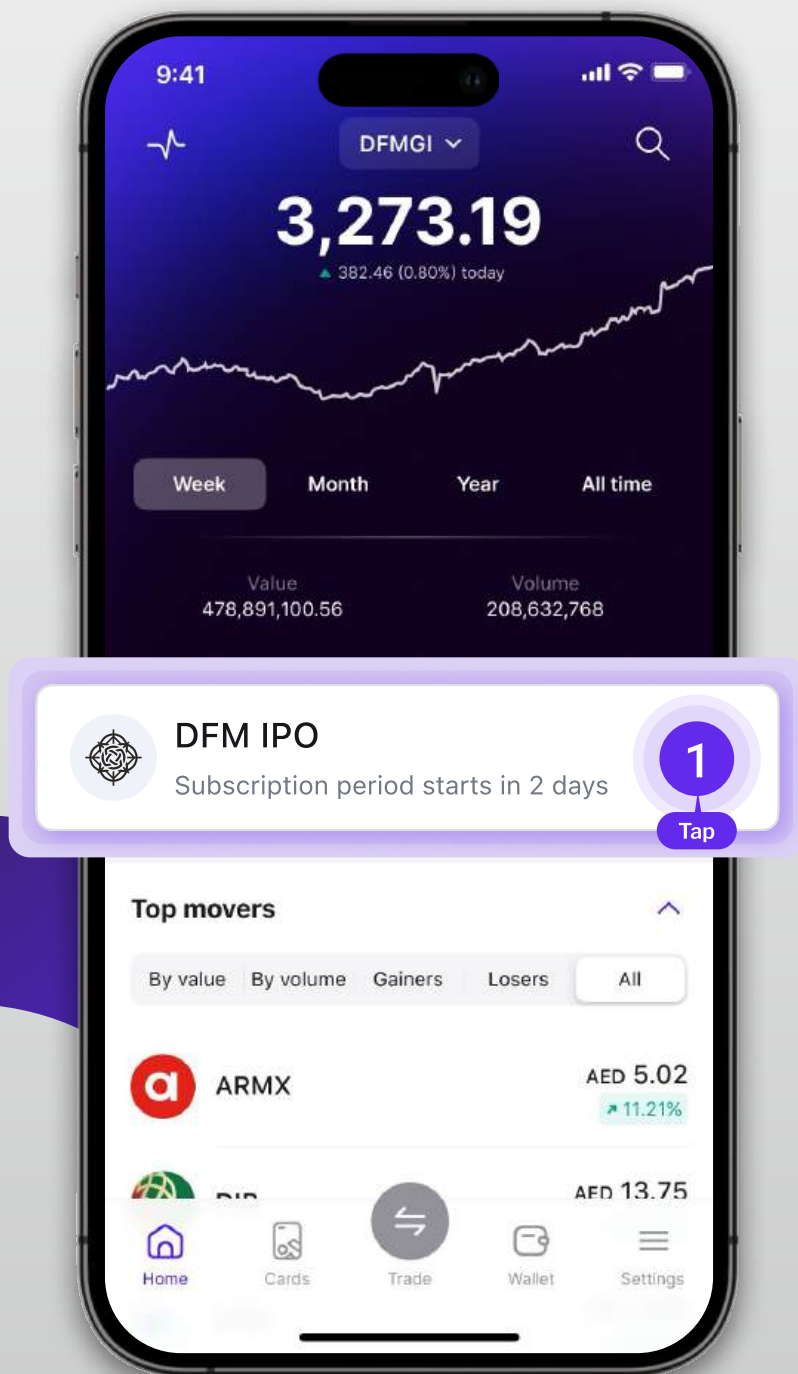


03 .
Open Category Filter

View companies by category and track their performance.



How to Subscribe to IPOs



01 .

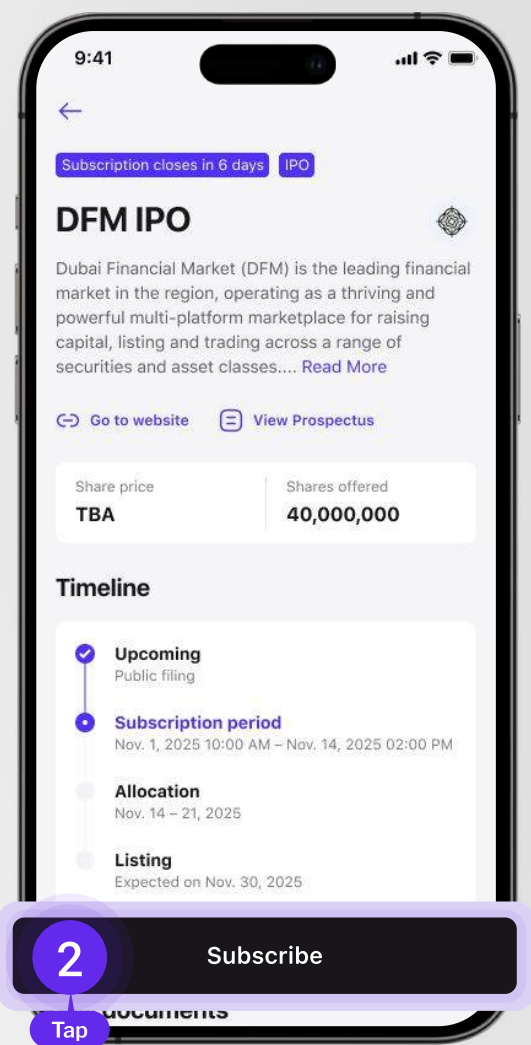
IPO From Homepage

View available IPO opportunities directly from the homepage.

How to Subscribe to IPOs

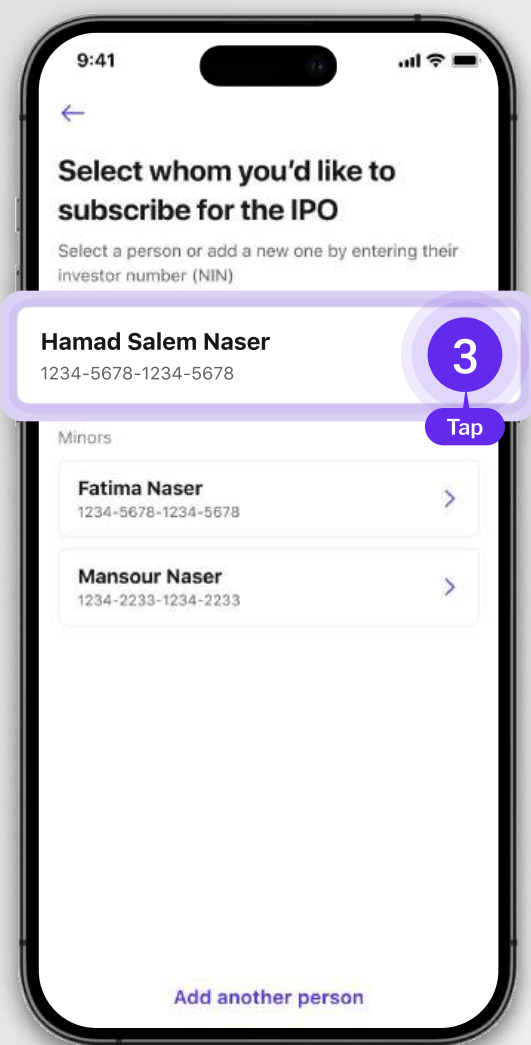
02 . IPO Details Page

Review IPO details, timeline, documents, and minimum investment.



03 . Select Subscriber

Select who you want to subscribe for or add another investor.

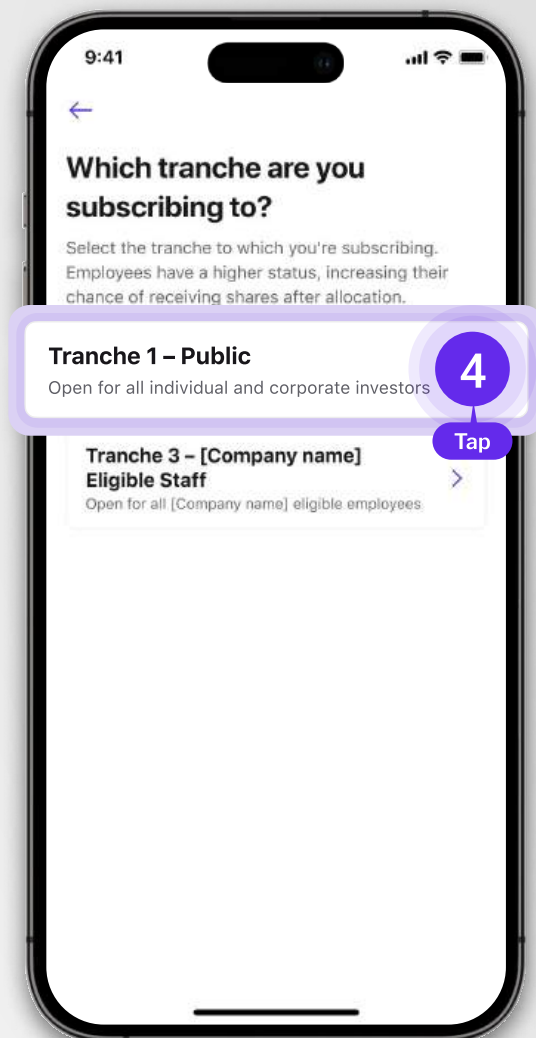


How to Subscribe to IPOs

04.

Select Tranche

Select the eligible tranche for subscription.

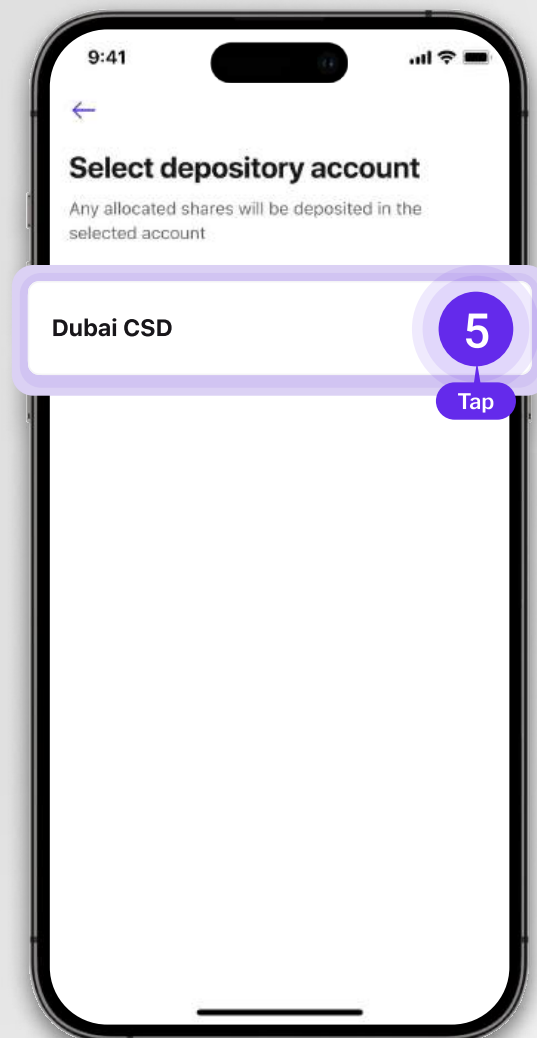


05.

Select Depository Account

Allocated shares will be deposited into this account.

① If you already have a trading account, simply select the broker linked to your account to start trading once the company is listed.



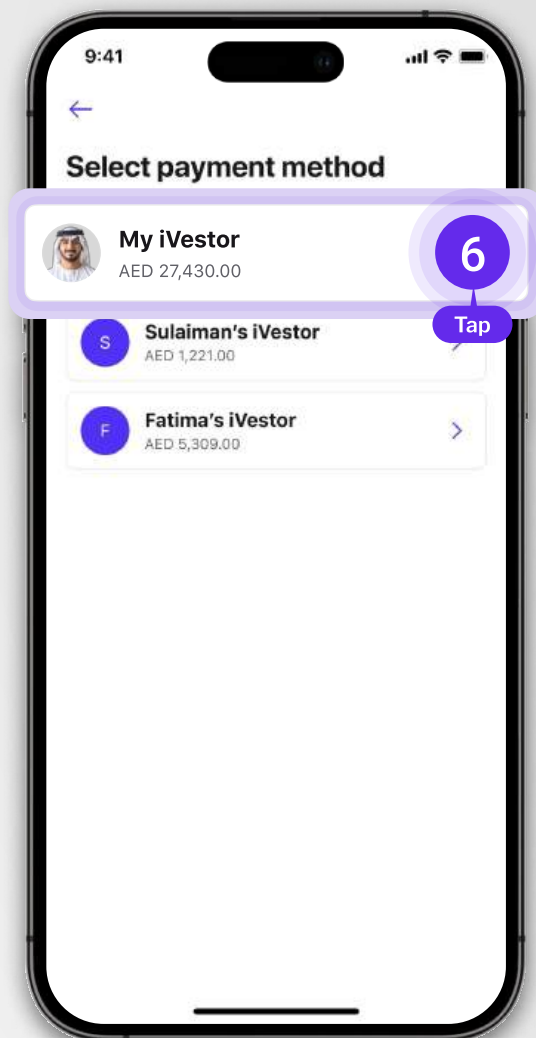
How to Subscribe to IPOs

06.

Select Payment Method

Select available funding source for subscription.

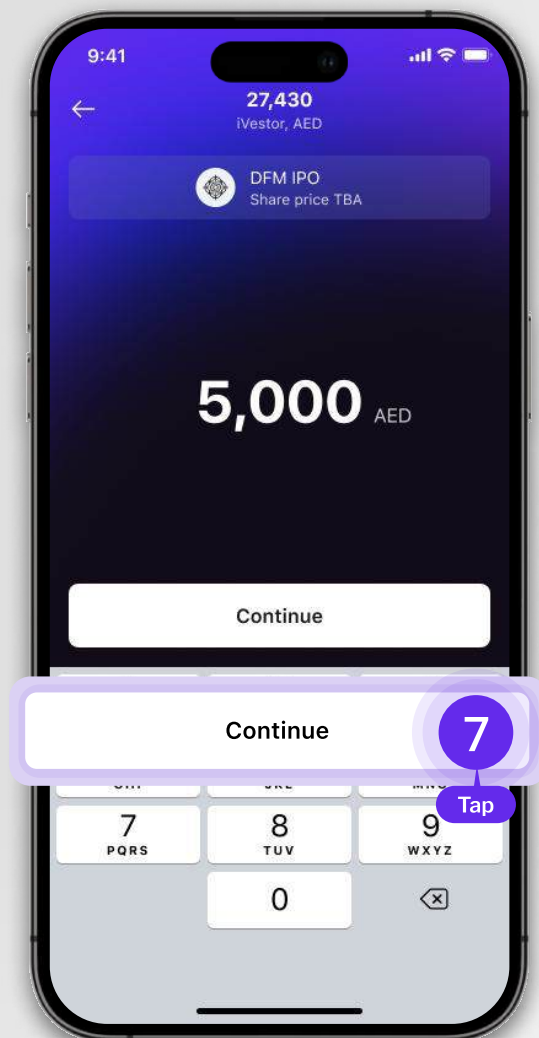
 Make sure you have sufficient funds in your iVestor account before you subscribe.



07.

Enter Subscription Amount

Input investment amount.

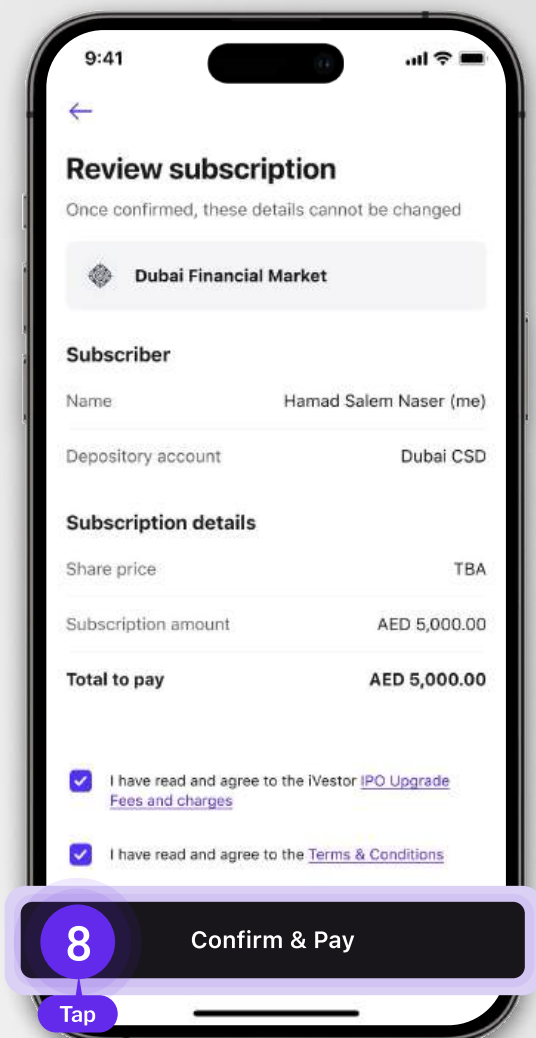


How to Subscribe to IPOs

08.

Review Subscription

Review subscription details before confirming.

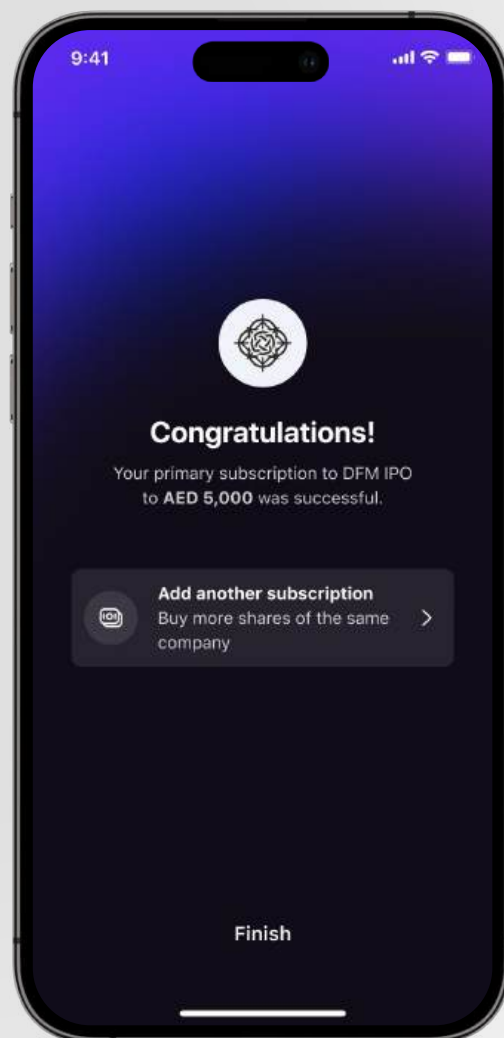


09.

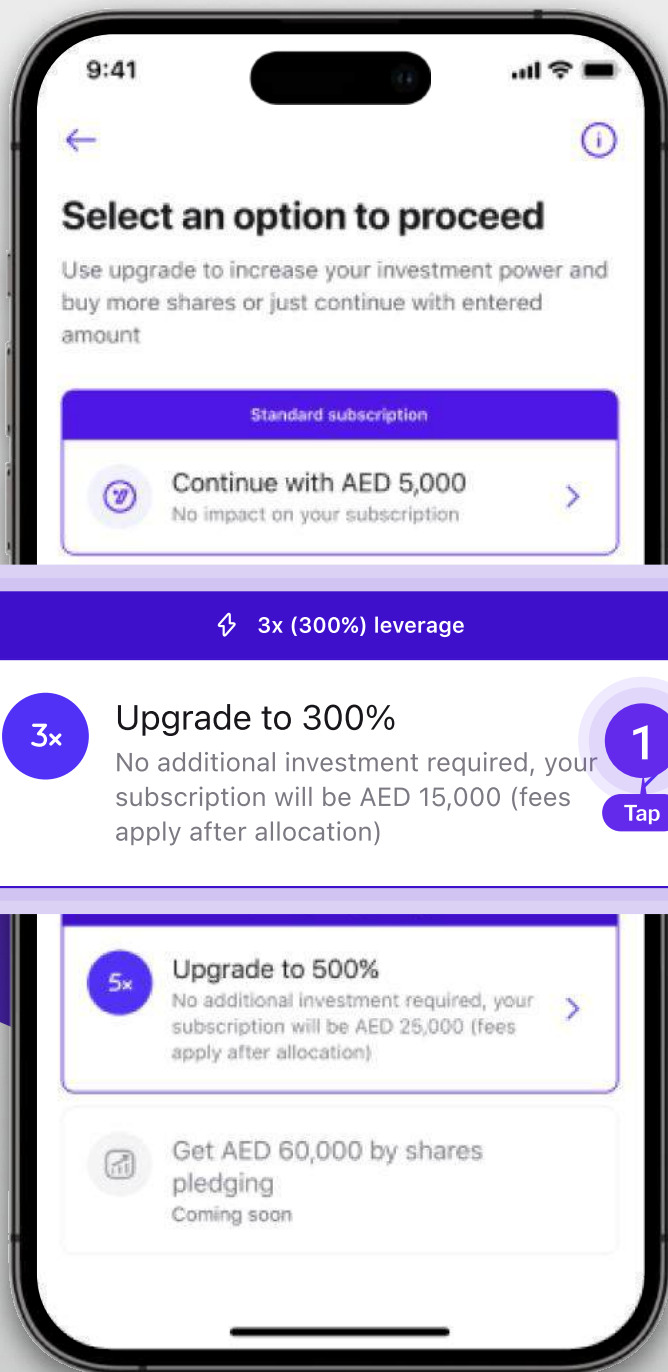
Subscription Success

Your IPO subscription has been successfully submitted.

- ① Once the subscription period ends, your allocated shares and any refunds will be credited to your iVestor account.



How to Upgrade Your IPO Subscription



01 .

Select Upgrade Option

Increase your investment power by selecting an upgrade option.

- ⓘ Upgrading your IPO subscription may increase your share allocation.

How to Upgrade Your IPO Subscription

02.

Provide Information & Subscribe

Enter personal and financial details to proceed with upgrade.

9:41

←

We need some additional information to process your upgrade request

It will take 1-2 minutes of your time

Personal Details

Country of Birth

Place of Birth

Living in UAE Since

Marital Status

No. of children

Monthly Expenses (AED)

☐ Above 20,000 ☐ Below 20,000

2 Apply for upgrade

Tap

03.

Review Upgrade Subscription

Check subscription amount, upgrade value, and fees.

9:41

←

Review subscription

Once confirmed, these details cannot be changed

DFM IPO

Subscriber

Name Hamad Salem Naser (me)

Depository account Dubai CSD

Subscription details

Share price TBA

Subscription amount AED 5,000.00

Total to pay AED 5,000.00

IPO Upgrade details

Bank partner Bank name bank logo

Upgrade amount AED 25,000.00

3 Confirm & Pay

Tap

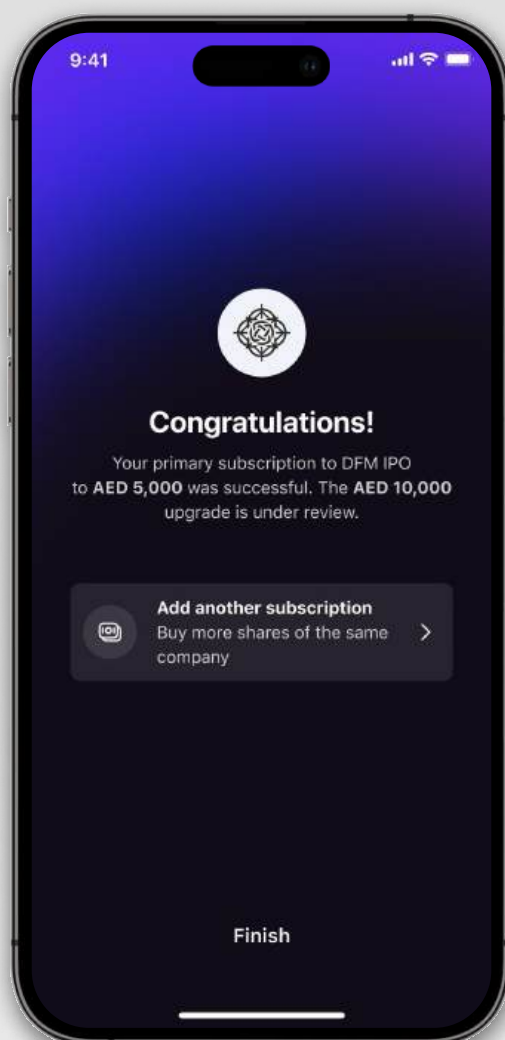
How to Upgrade Your IPO Subscription

04.

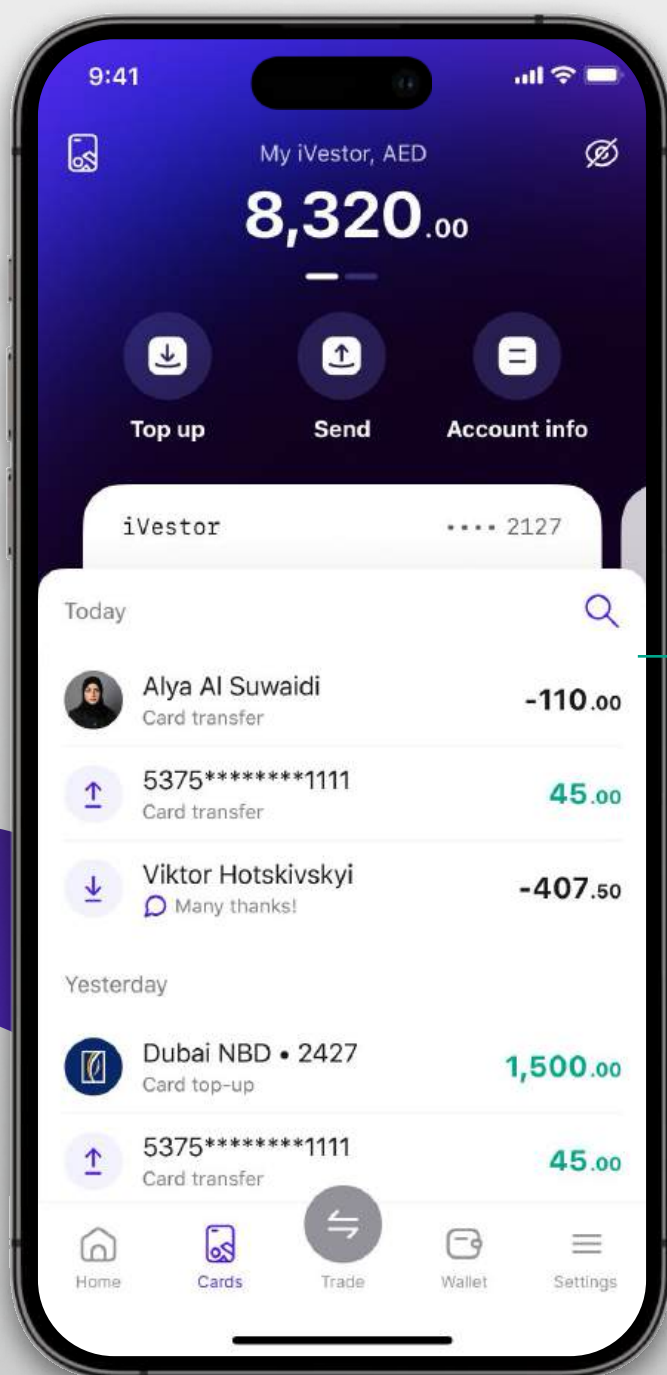
Subscription Success

Your IPO subscription upgrade has been successfully submitted.

 You will receive an email once your IPO upgrade is confirmed.



How to View Dividends



01 . Open Transaction History

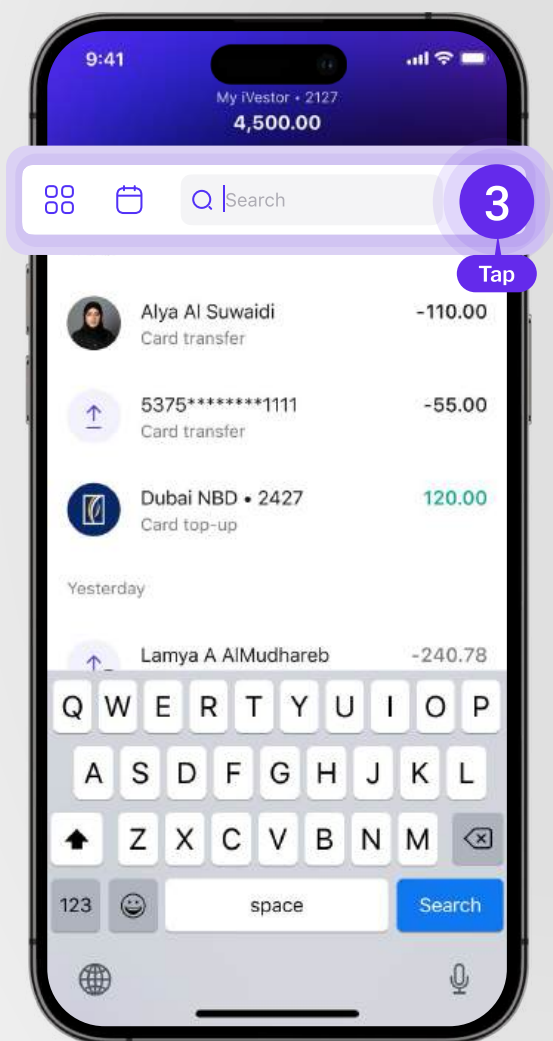
Access your account activity from the wallet section.

How to View Dividends

02.

Search Transactions

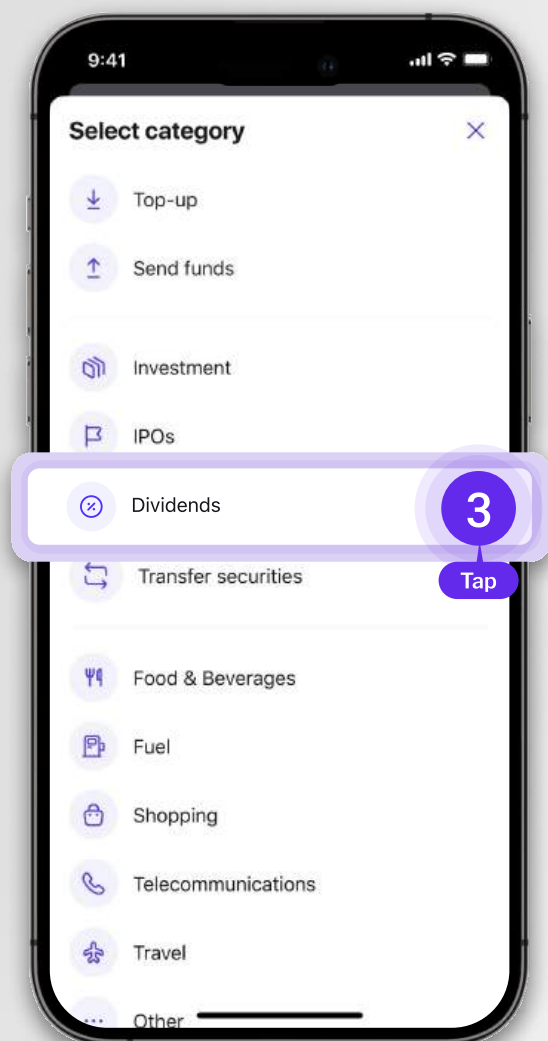
Use search to quickly find specific transactions.



03.

Open Category Filter

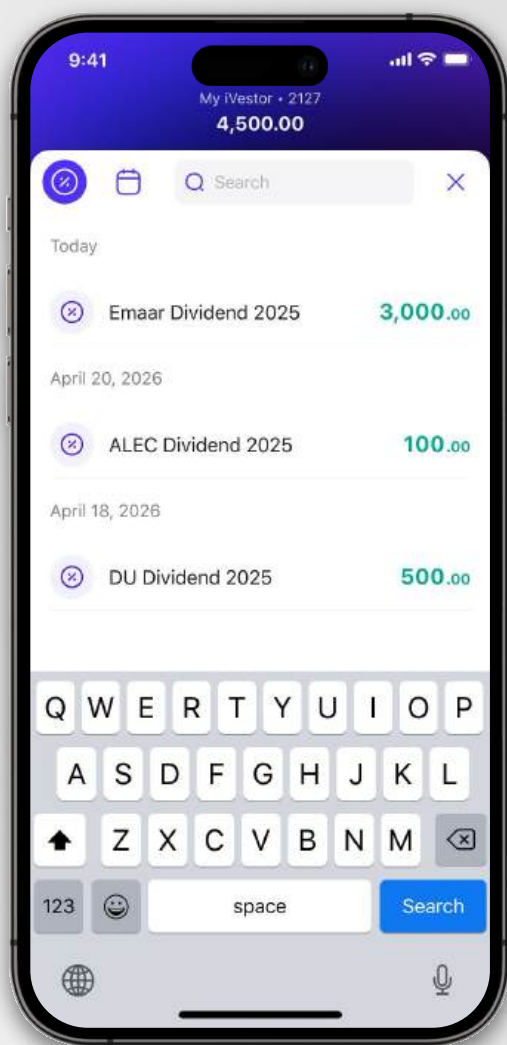
Filter transactions by category for better visibility.



Filtering Dividends by Date

04 . View Dividend History

See all your dividend payouts with date and amount.



05 . Filter Dividend by Date.

You can view your dividends by filtering by date.

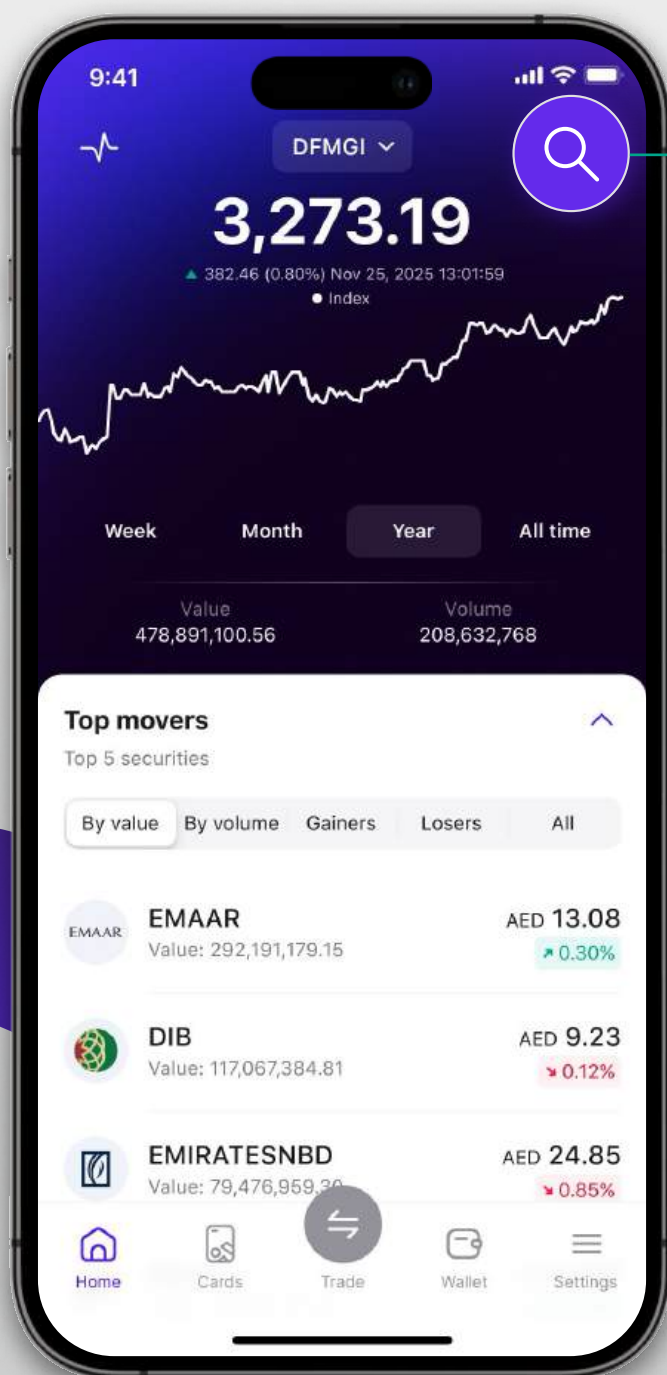


How to View Company Information

01.

Search Company

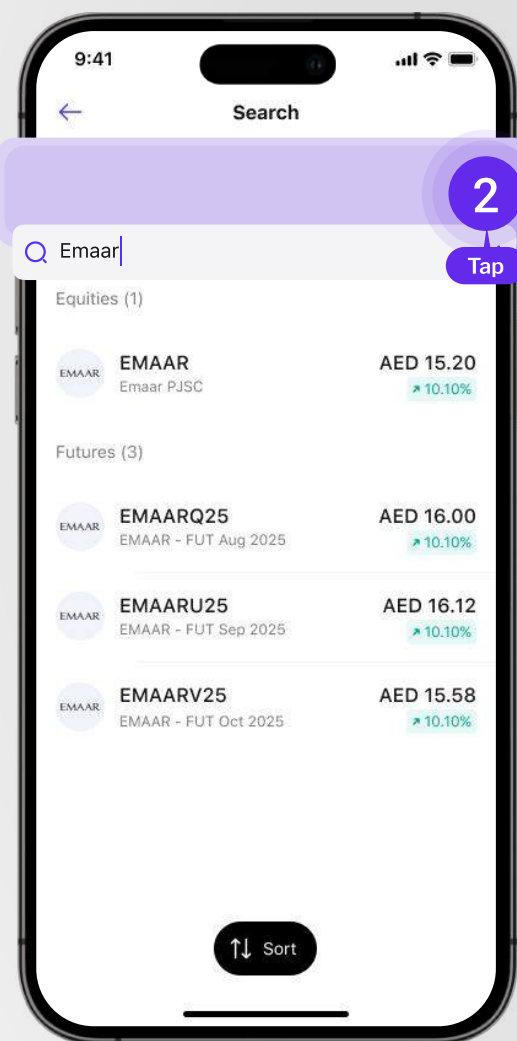
By clicking search you can find all the companies.



How to View Company Information

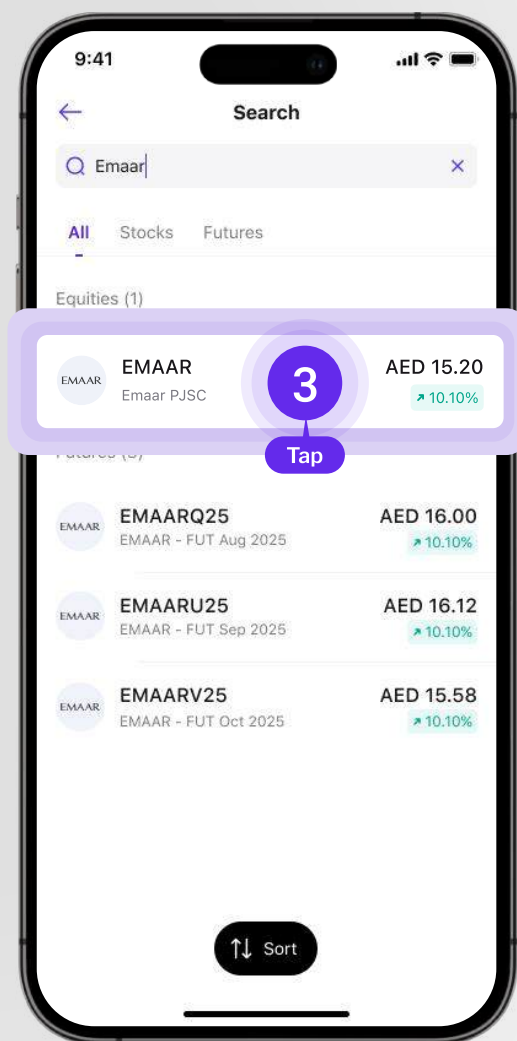
02 . Specific Company

Use search to quickly find specific company.



03 . See Company Details

Click any company to see details.

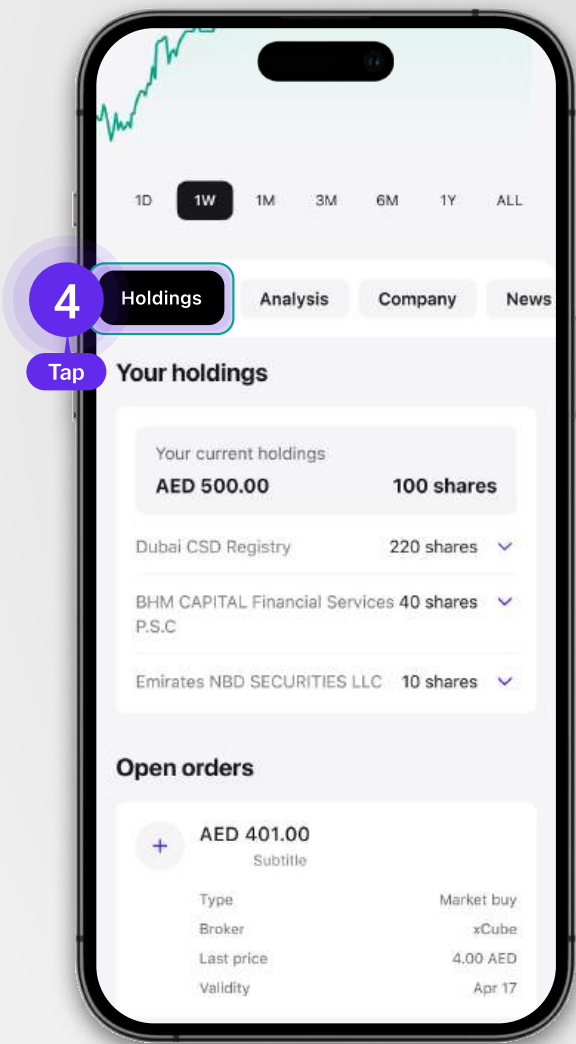


How to View Company Information

04 . View Company Holdings

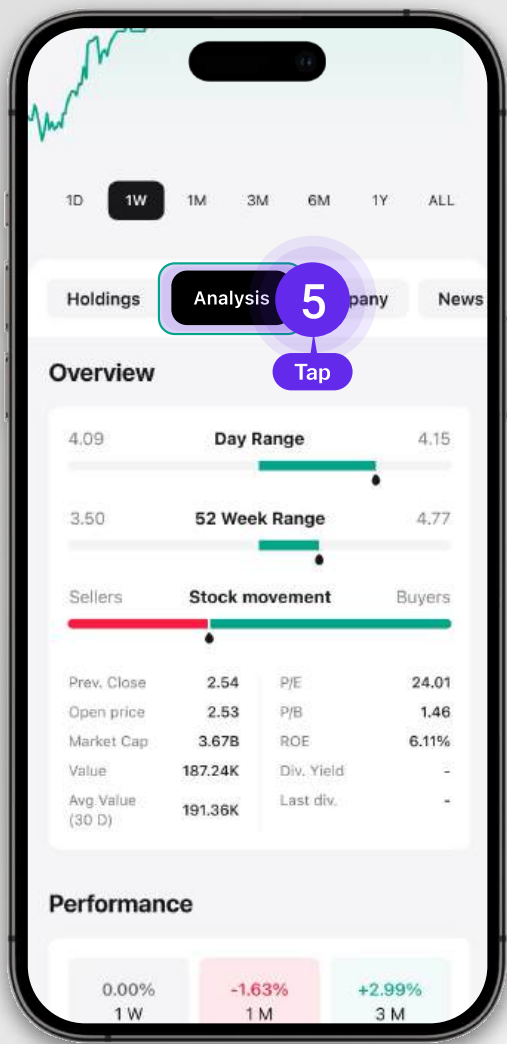
Click on Holdings Button to see to see your holdings (if any).

i You can view the shares you own in detail with each broker.



05 . View Company Analysis

Click on Company Button to see Company performance..

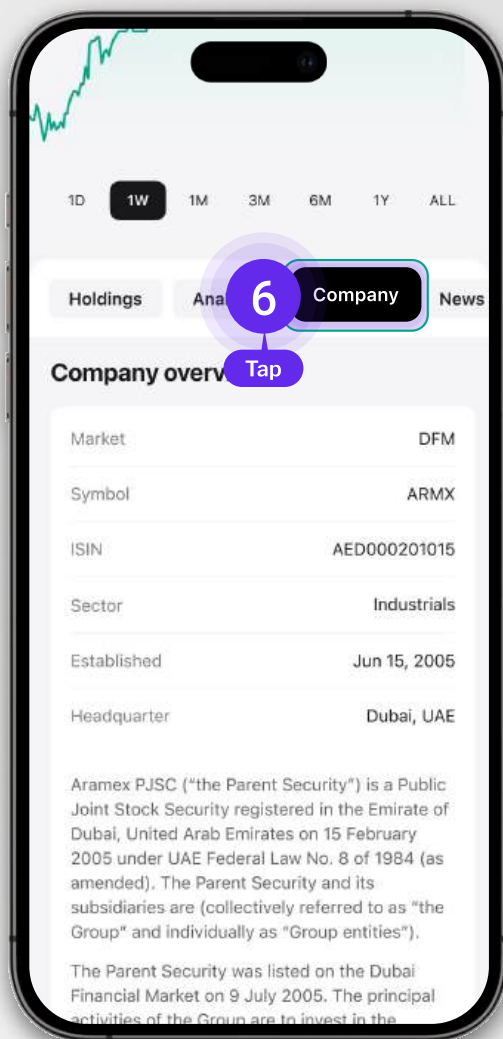


How to View Company Information

06 .

View Company Details

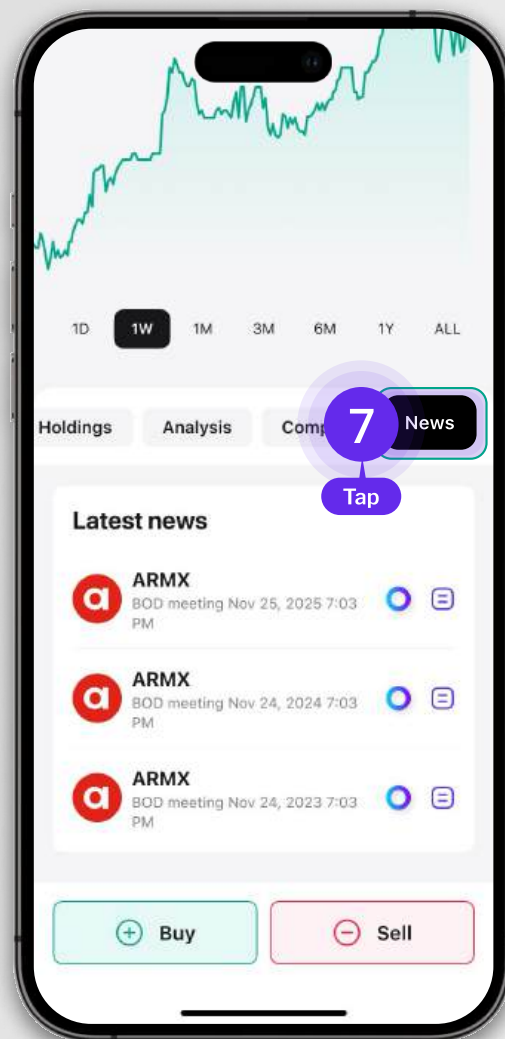
Click on Company Button to see Company Details.



07 .

View Company News

Click on News Button to see latest Company News.



How to Set Company Alerts



08.

Add Company to Watchlist

Click on Watchlist button to add any company in your Watchlist.

09.

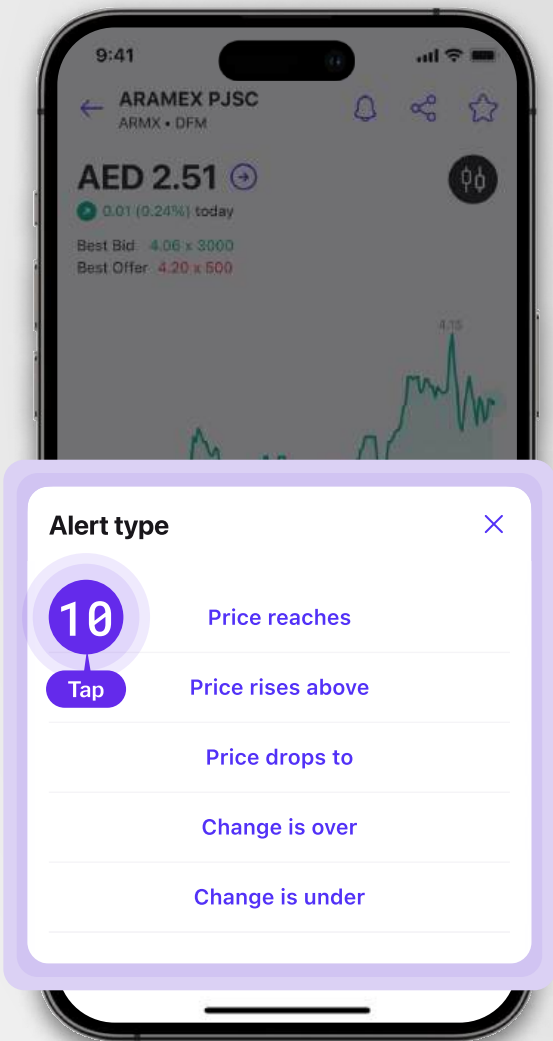
Active Price Change Alert

To active price change alert, click on this Alarm button.

How to Set Company Alerts

10. Select Alert type

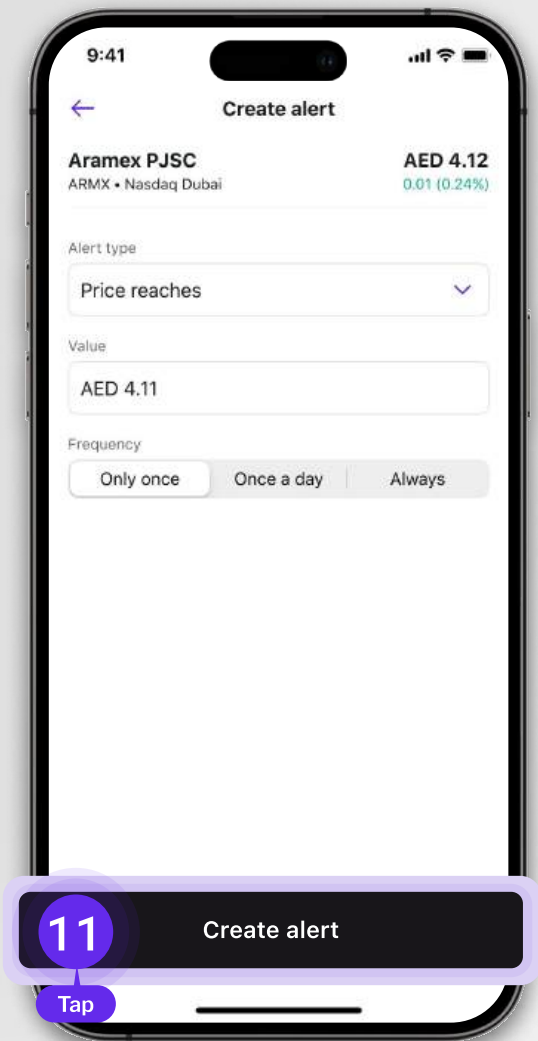
Select any alert type you want to set.



11. Create Alert

Set your alert preference.

i You will receive an alert once the price reaches your selected target, so you can take action.



Virtual Card Overview

01 .

Top Up

Add money to your iVestor account using multiple options.

02 .

Send Funds

Send money to your iVestor card, your bank account, or other iVestor users.

03 .

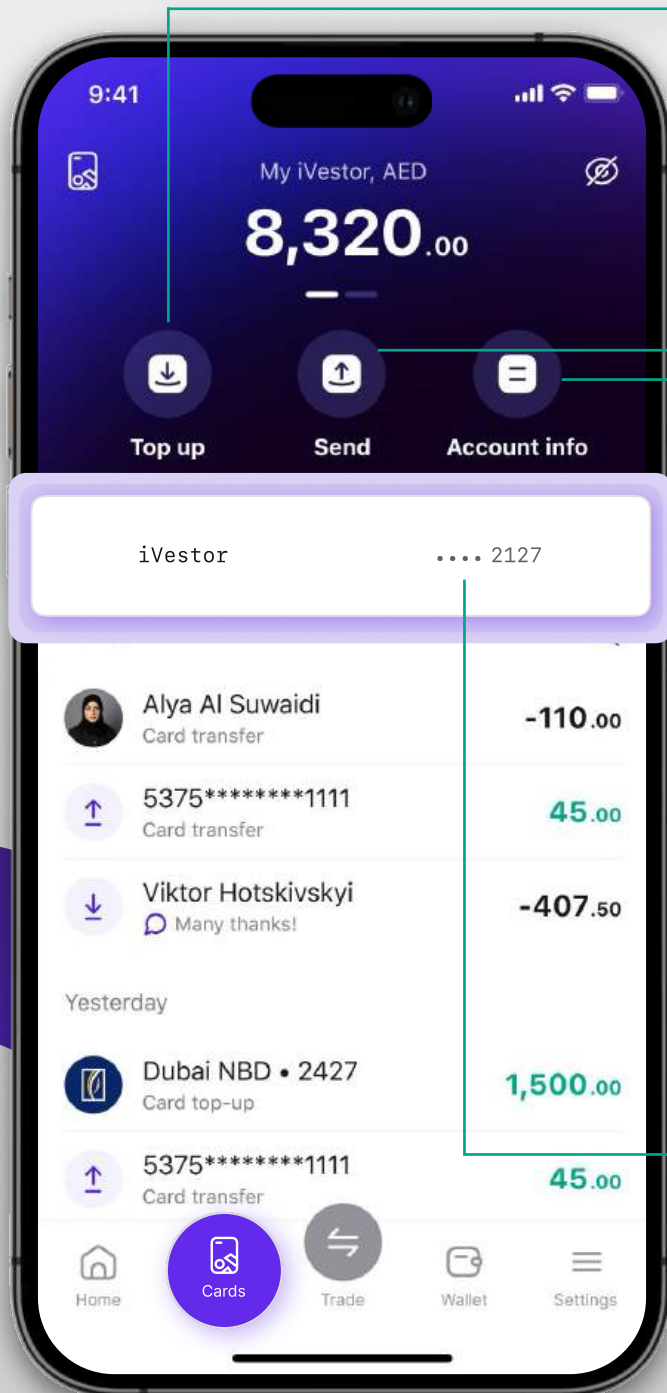
Account Info

View your IBAN information and bank details.

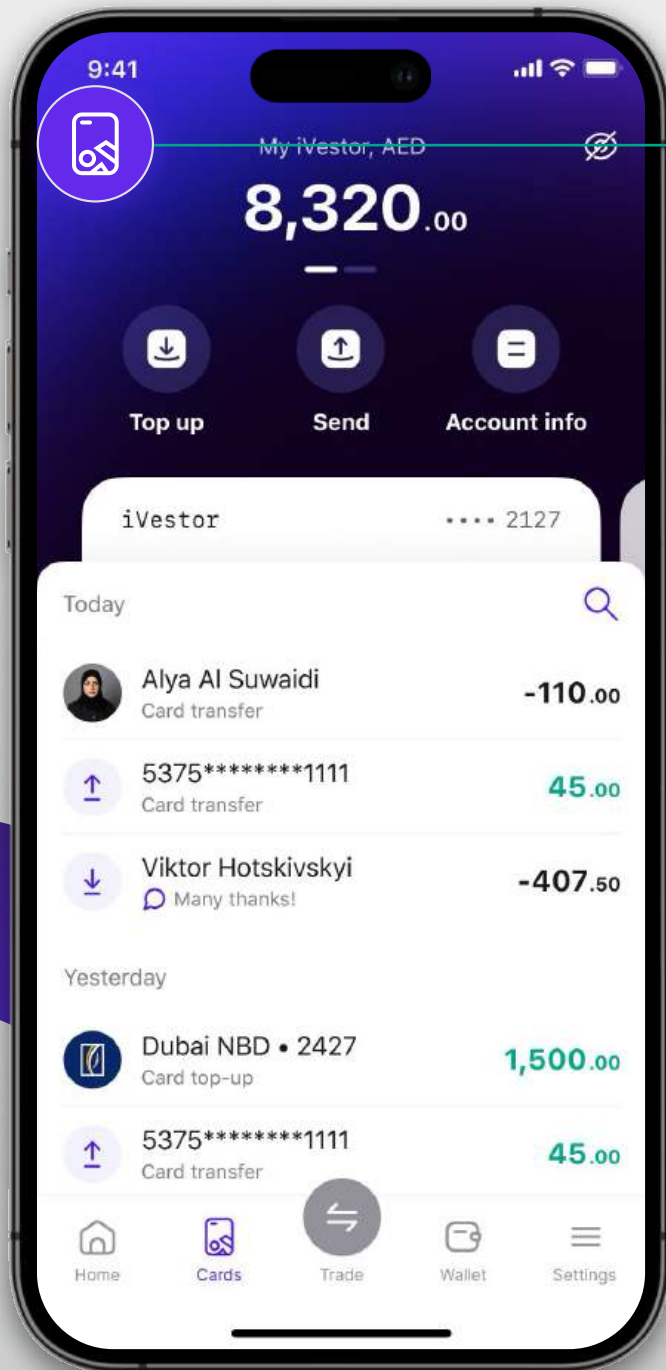
04 .

Card Settings

View settings option for your card here.



How to Apply For a Virtual Card



01 .

Click Cards Tab

Tap Cards from the Top Card icon to access your card management screen.

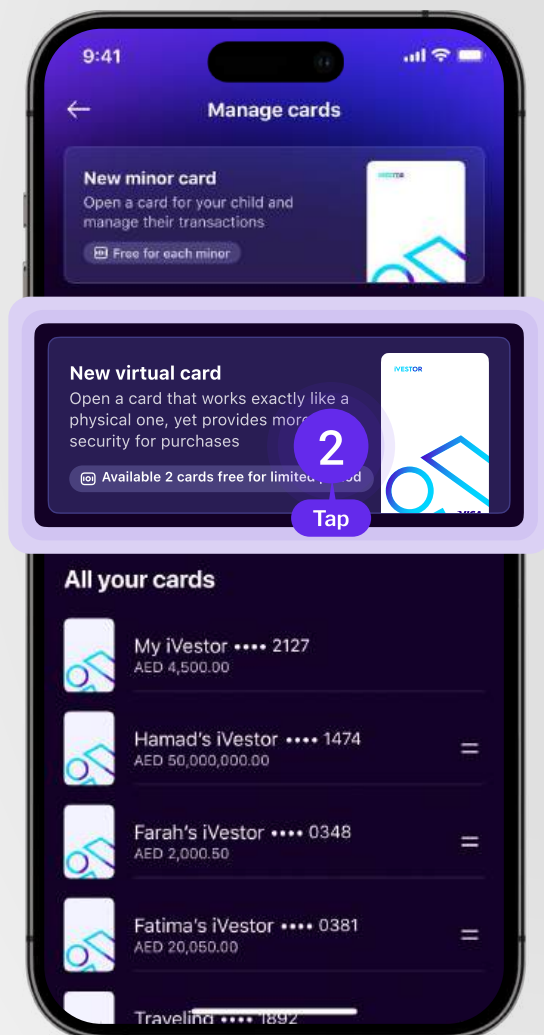
How to Apply For a Virtual Card

02.

Create Virtual Card

Select "New virtual card" and start the process.

 Create up to two free virtual cards to keep your spending organised and easy to track.



03.

Customize Card Design

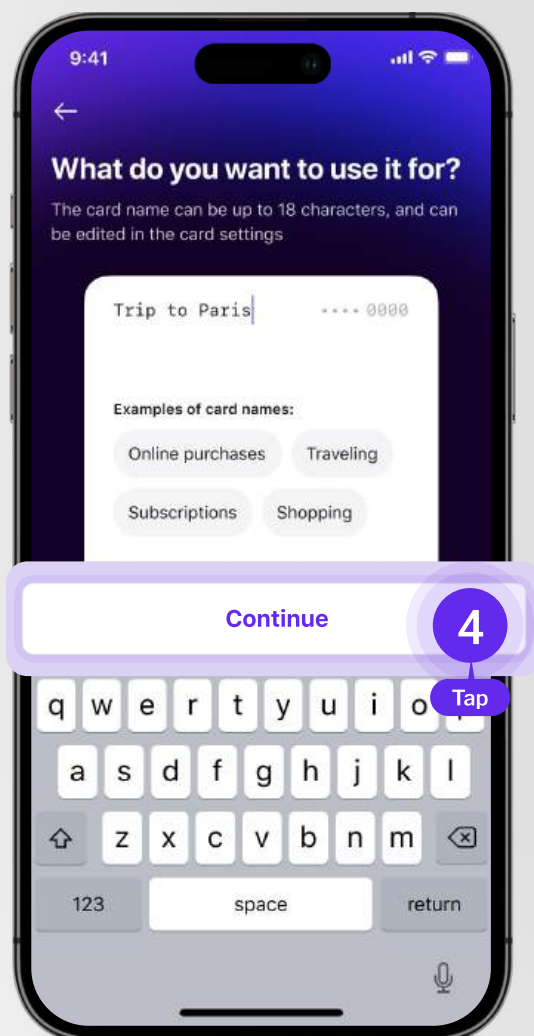
Choose your preferred card design and continue to personalize your virtual card.



How to Apply For a Virtual Card

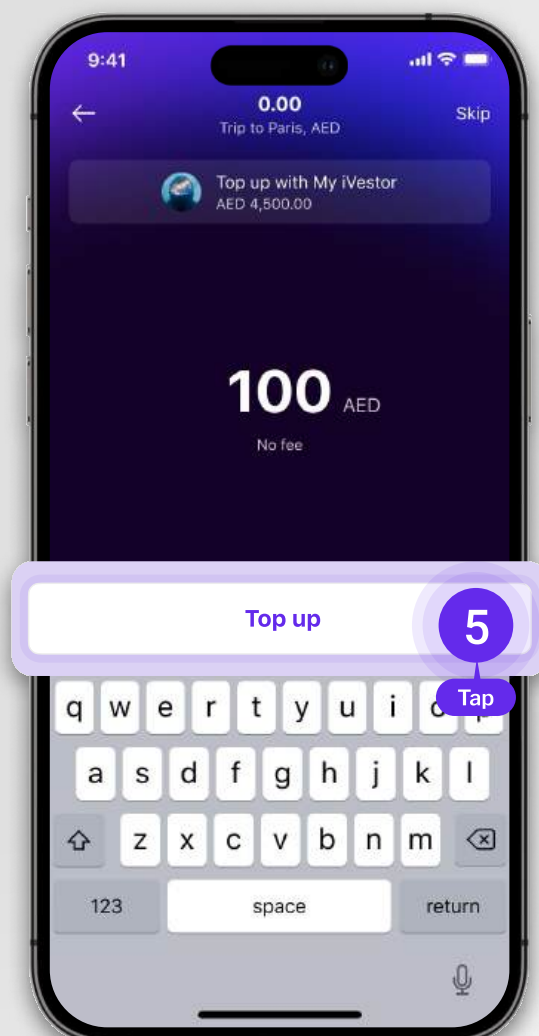
04 . Name Your Card

Enter a name for your card to help identify its purpose, such as travel, shopping, or subscriptions.



05 . Add Funds

Top up your virtual card by entering the amount or skip this step to add funds later.



How to Apply For a Virtual Card

06 .

Virtual Card Ready

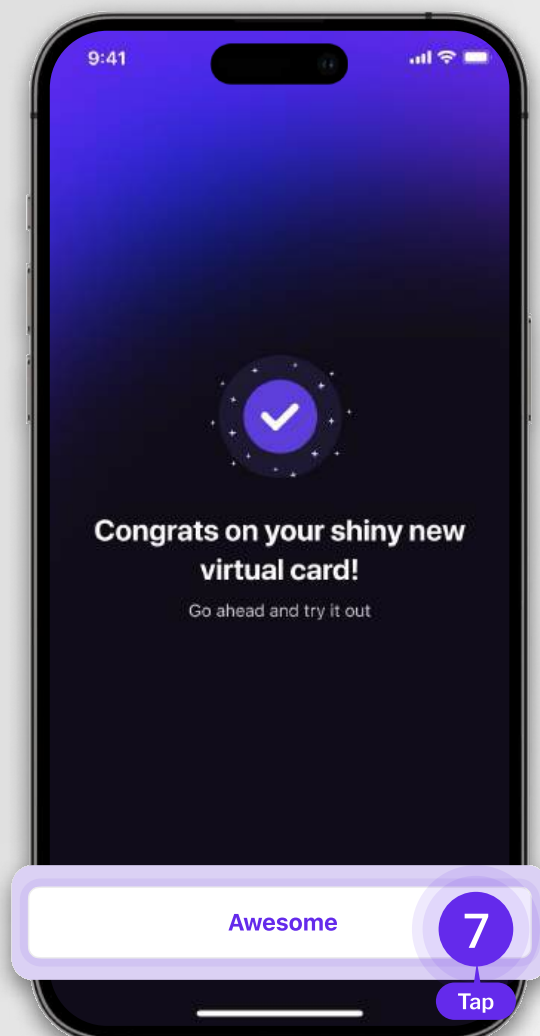
Your virtual card is created and ready to use. You can add it to Apple Wallet or Google Pay for quick payments.



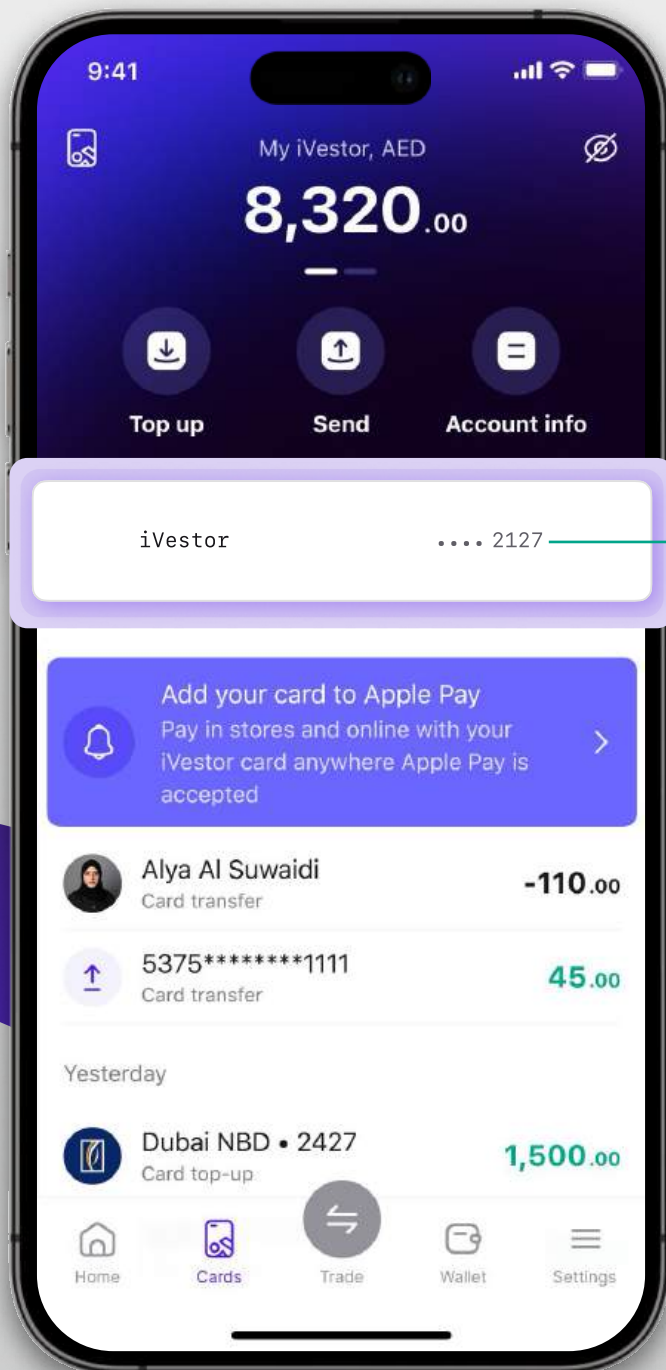
07 .

Card Created Successfully

Your new virtual card is now active and ready for transactions.



How to Add Your Virtual Card to Apple Pay & Google Pay



01 . Card Settings

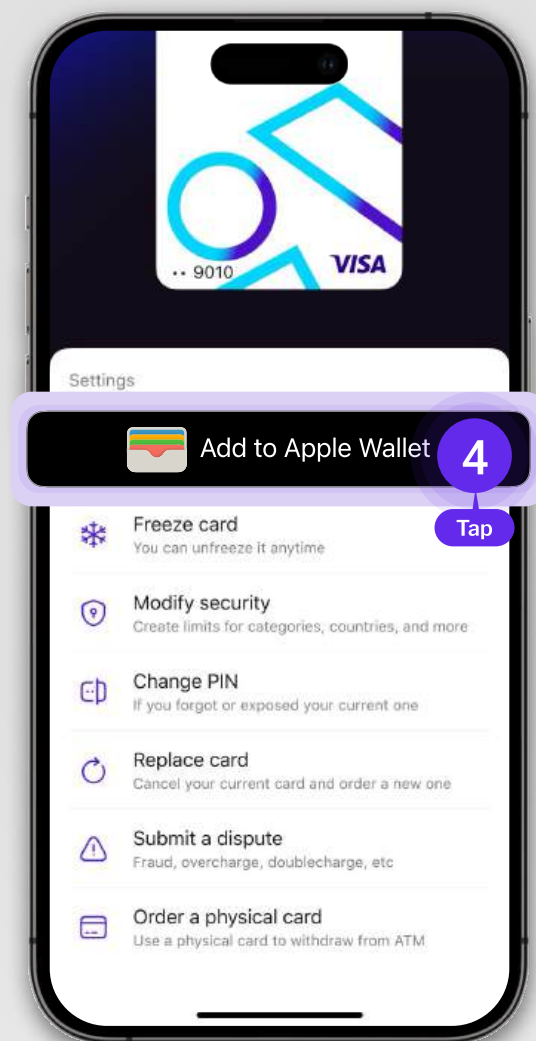
Add to google/ apple wallet and view options to control your iVestor.

How to Add Your Virtual Card to Apple Pay & Google Pay

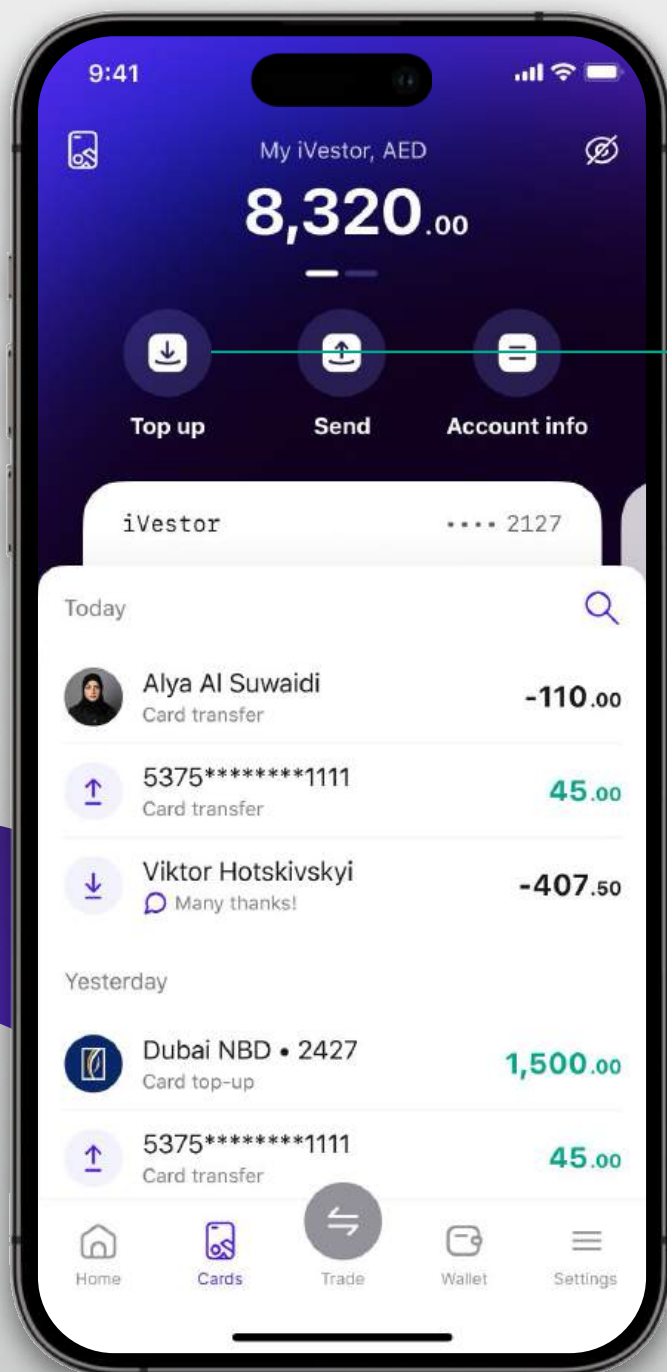
04.

Manage Card Settings

You can also access Add to Apple Wallet from card settings anytime.



How to Top Up Your Account



01 .

Top Up

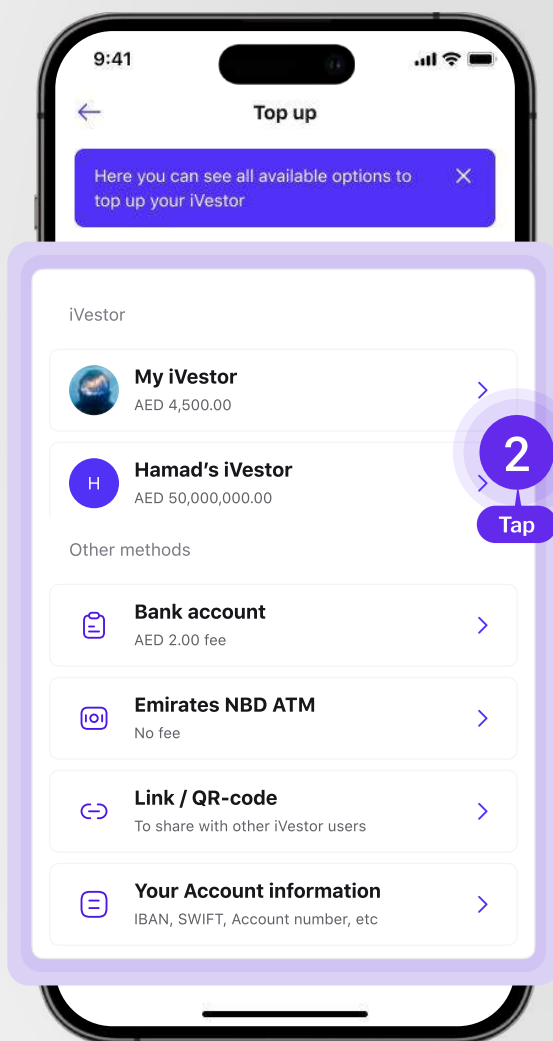
Tap on Top up to add funds your account.

How to Top Up Your Account

02.

Select Method

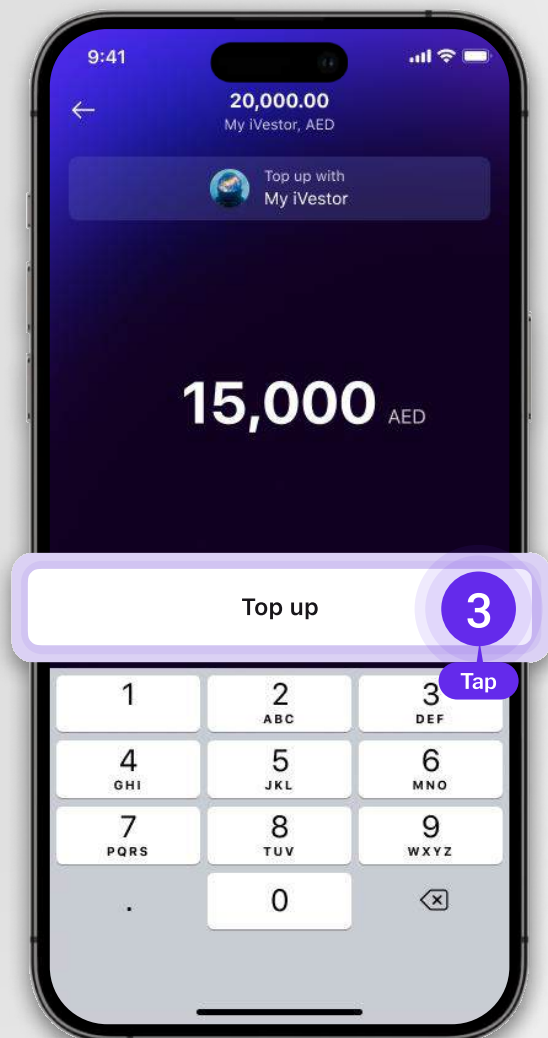
To Top up select any method from listed options.



03.

Set Amount

After selecting a method, enter the amount you would like to top up.

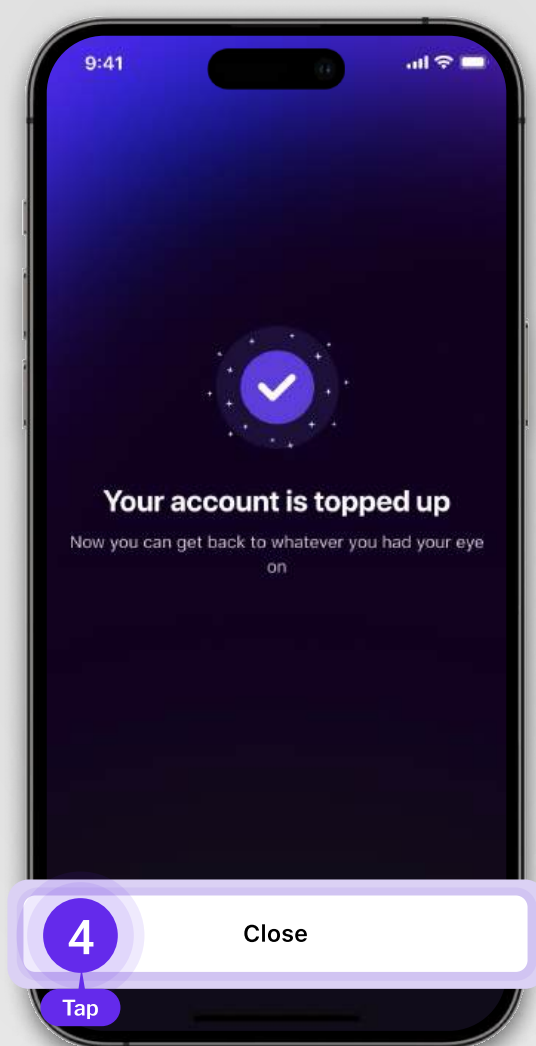


How to Top Up Your Account

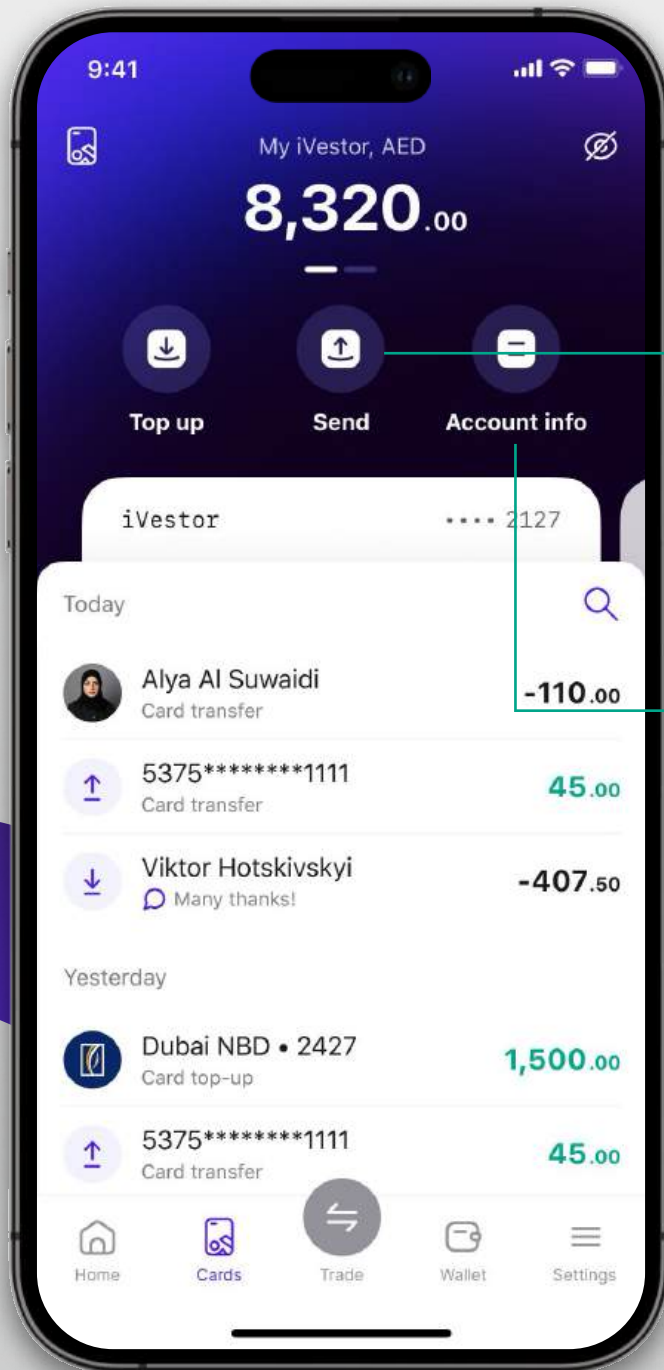
04.

Top up Successful

Your account has been topped up successfully.



How to Send Funds



01 .

Click Send

Start sending money from your wallet dashboard.

02 .

View your IBAN details

Click this button to View your IBAN details.

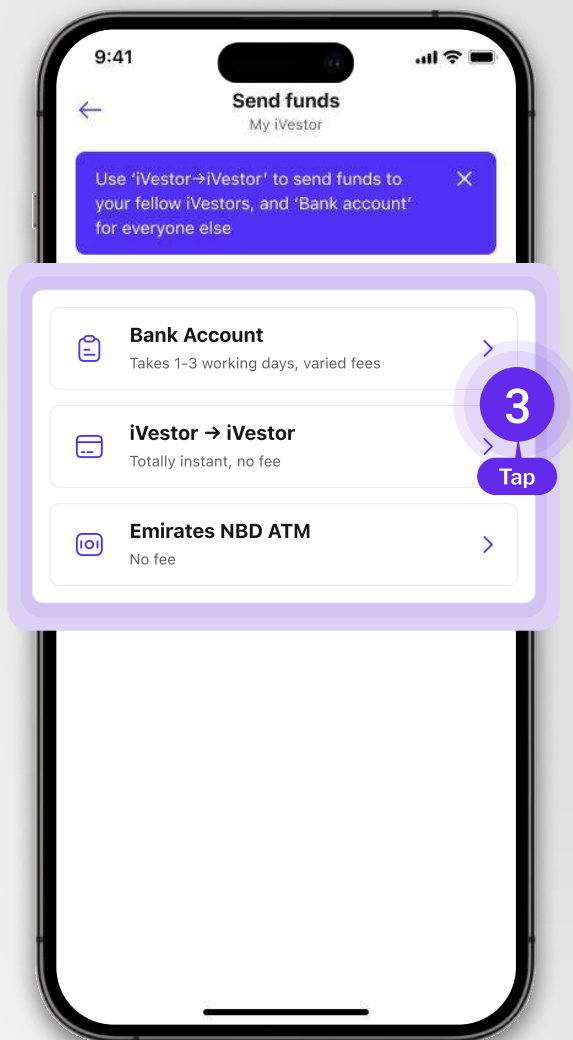
How to Send Funds

03.

Choose Transfer Method

Select how you want to send funds.

i If you choose bank account method, it will redirect you to the bank portal.

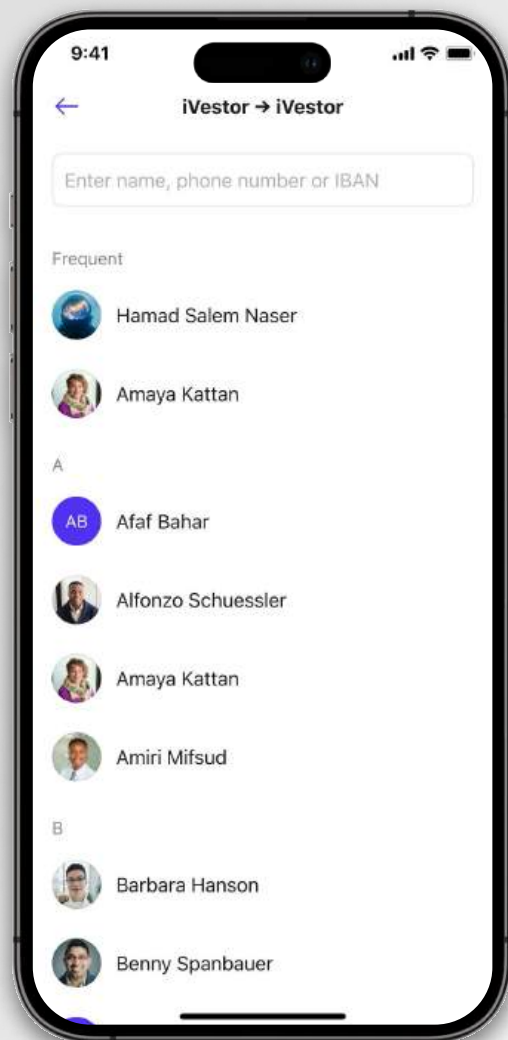


04.

Select Recipient

Choose a contact or search using phone number or IBAN.

i Use 'iVestor - iVestor' to send funds to your fellow iVestor users, and 'Bank Account' for everyone else.

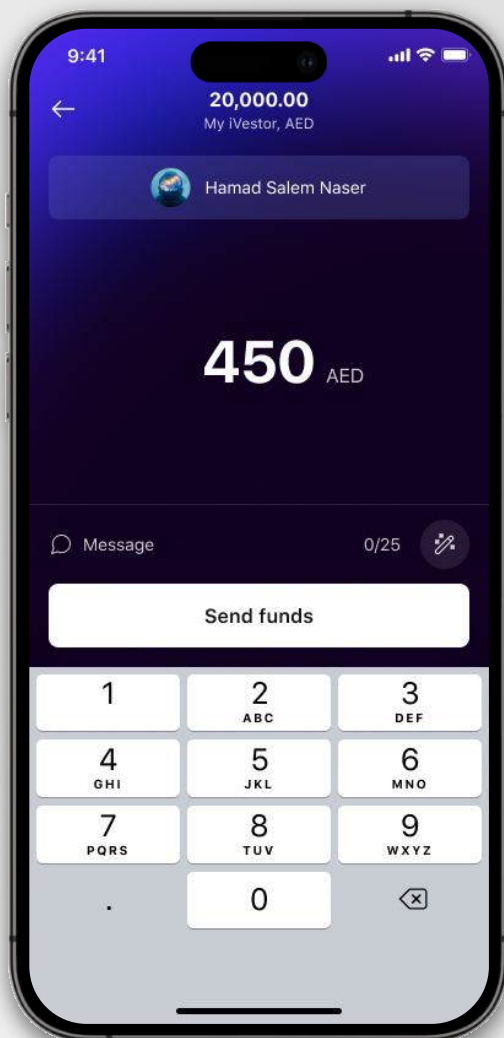


How to Send Funds

05.

Enter Amount

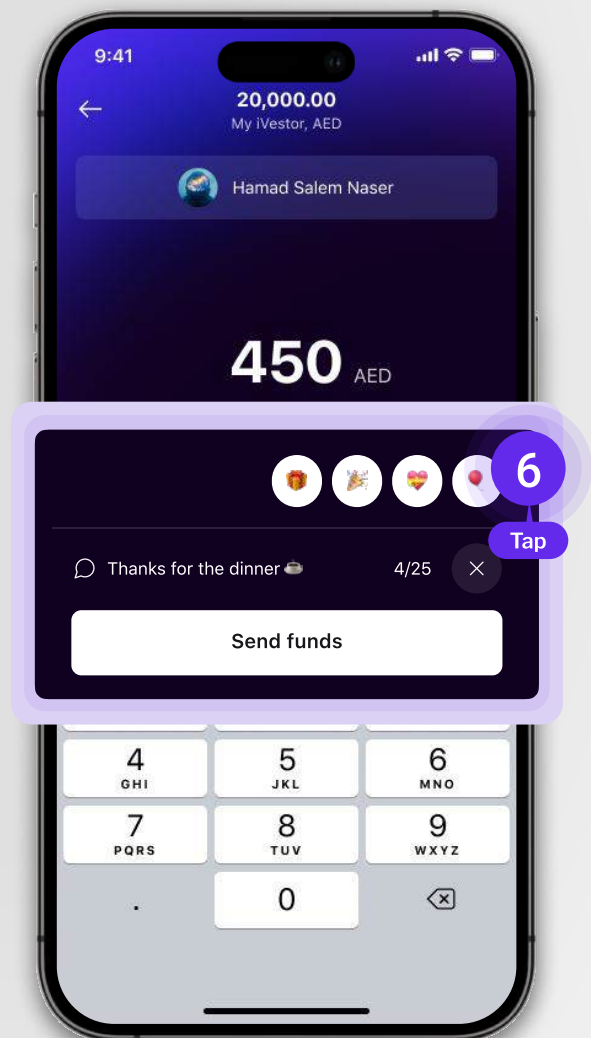
Enter the amount you want to send.



06.

Add a Message (Optional)

Add a note to personalize your transfer.

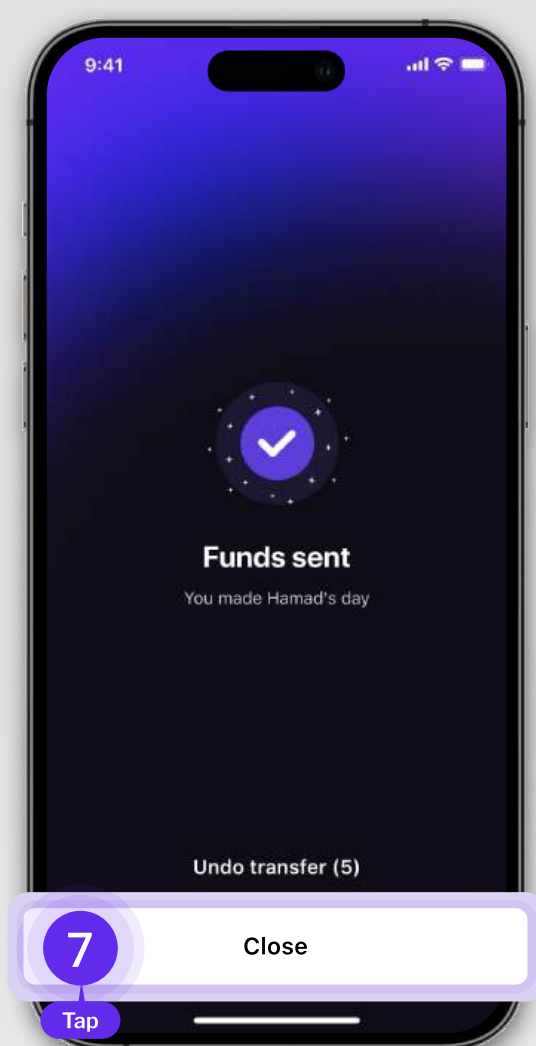


How to Send Funds

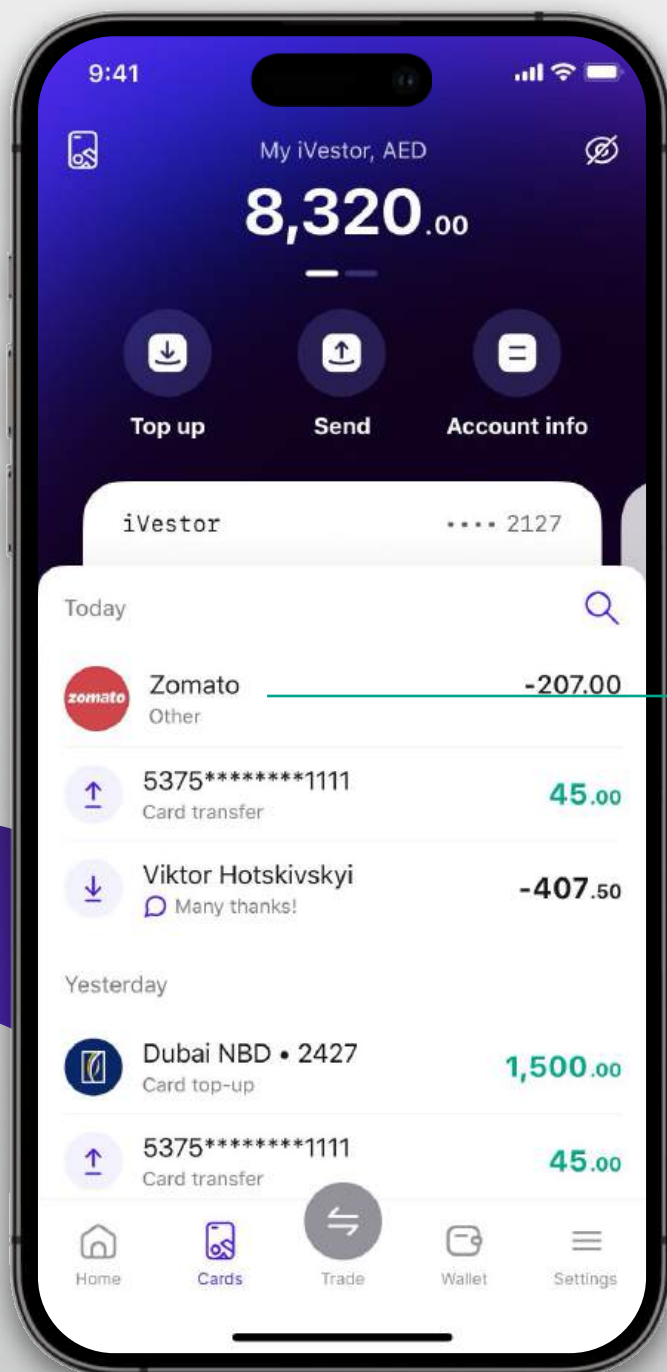
07.

Funds Sent Successfully

Your money has been transferred instantly.



How to Split Bills



01. Open Transaction Details

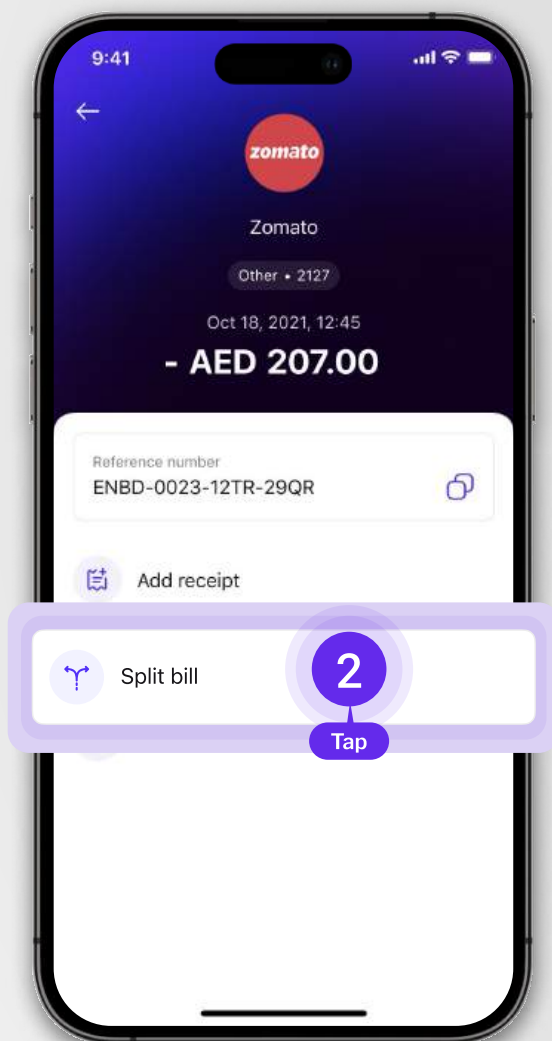
Select the payment you want to split with others.

How to Split Bills

02.

Start Split Bill

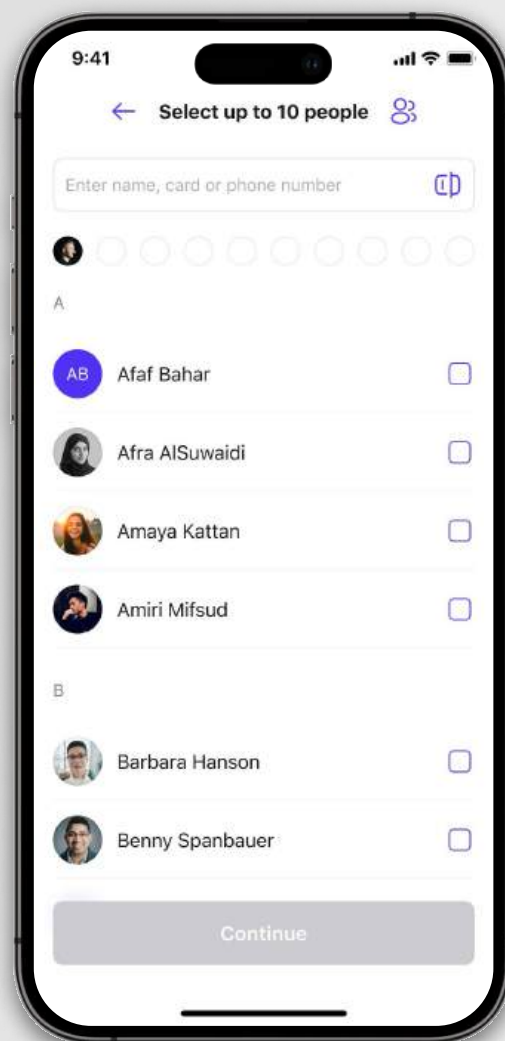
Begin splitting the payment with your friends.



03.

Select Participants

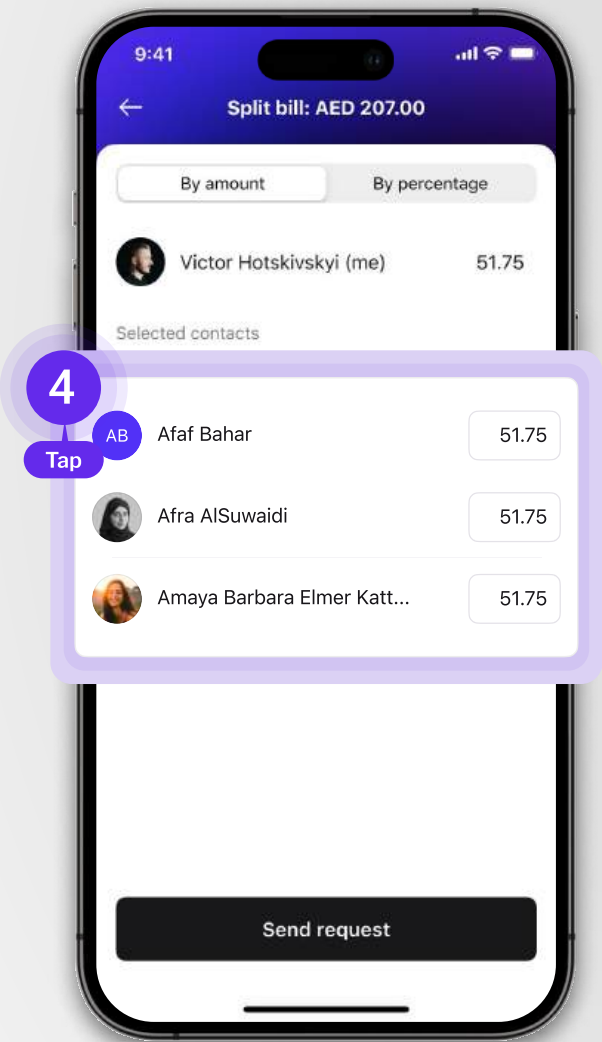
Choose up to 10 people to split the bill.



How to Split Bills

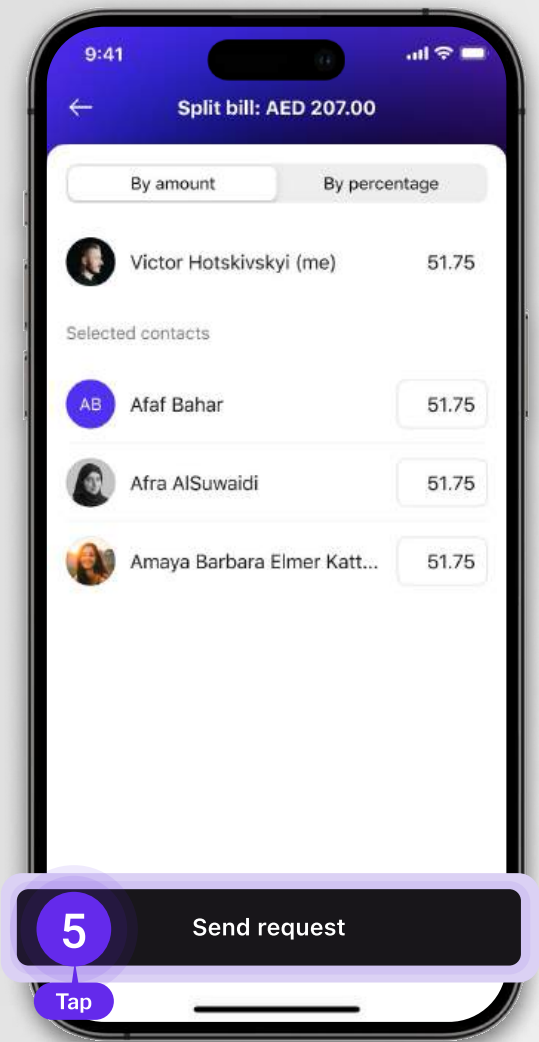
04 . Adjust Split Amount

Divide the total bill by amount or percentage.



05 . Send Request

Request payments from selected participants.



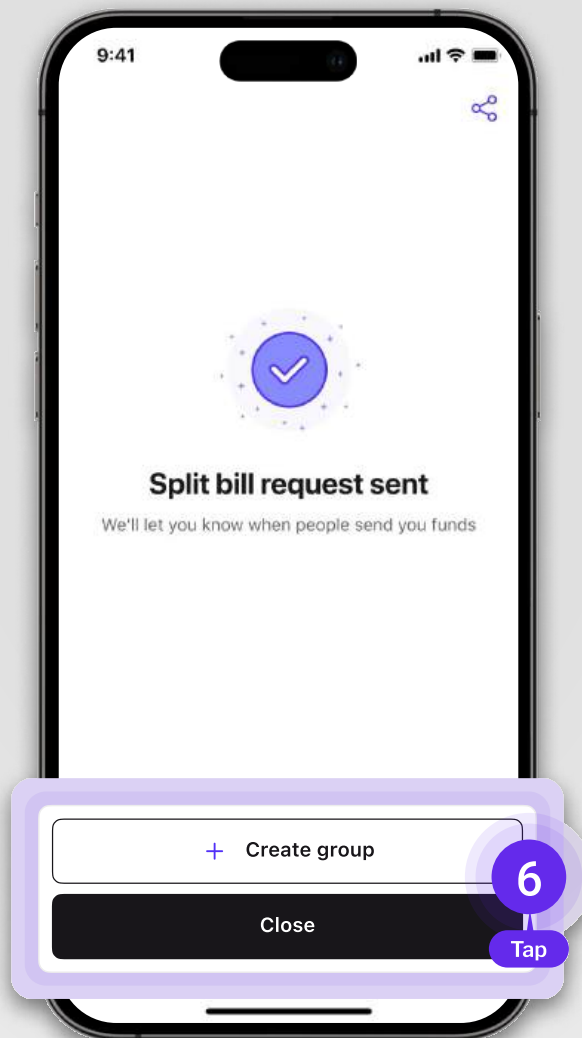
How to Split Bills

06 .

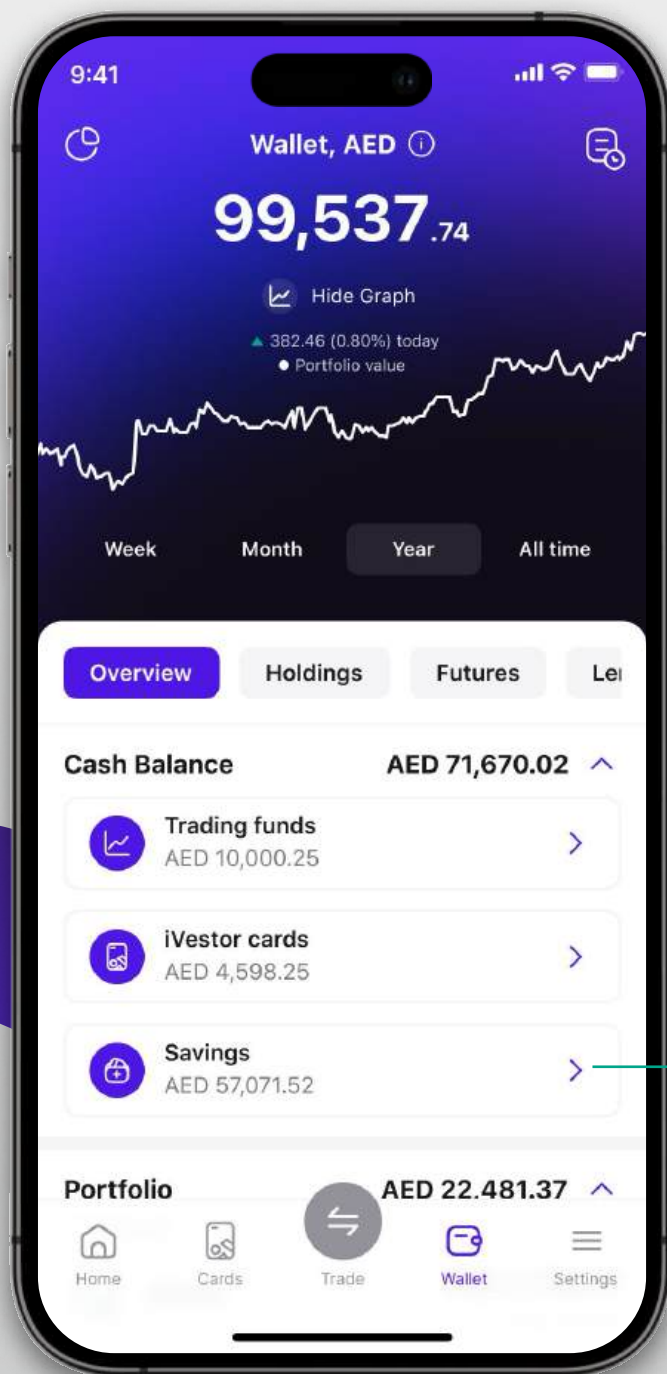
Request Sent Successfully

Participants will be notified to complete their payments.

 Quick tip: Create a group with the people you just selected for future bill splitting. You can add or remove members on the group settings page.



How to Set a Saving Goal



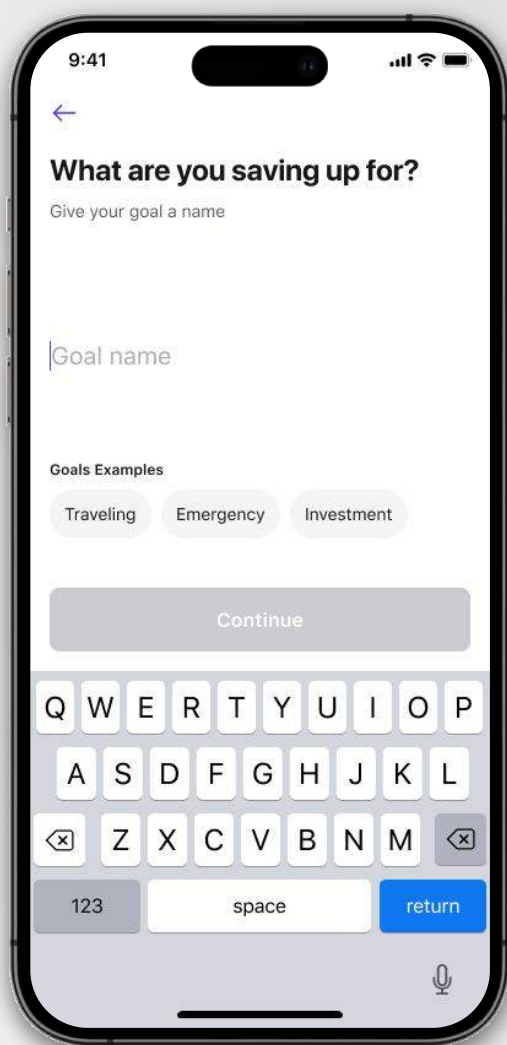
01 . Open Savings Section

Access your savings goals from the wallet dashboard.

How to Set a Saving Goal

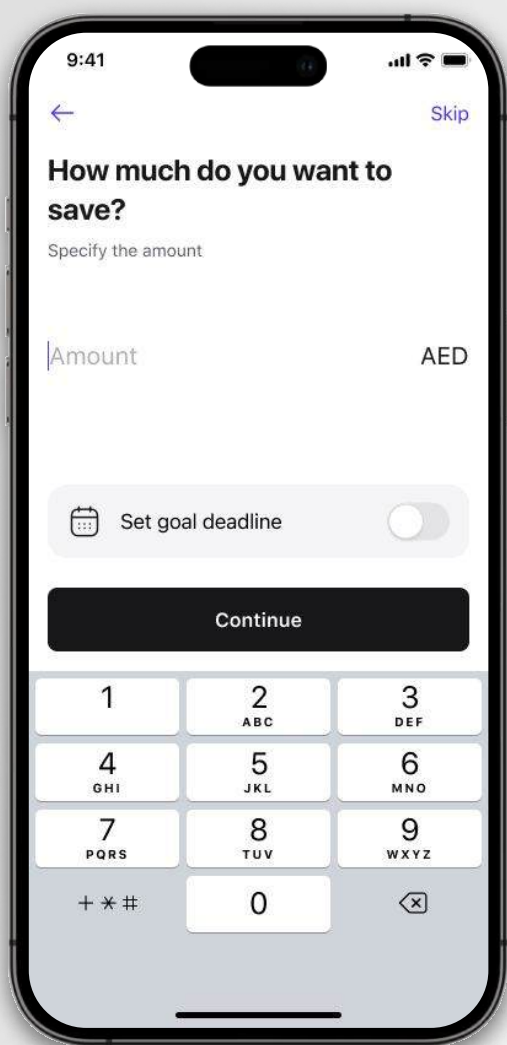
02 . Name Your Goal

Give your goal a name that reflects what you’re saving for.



03 . Set Target Amount

Enter how much you want to save for this goal.

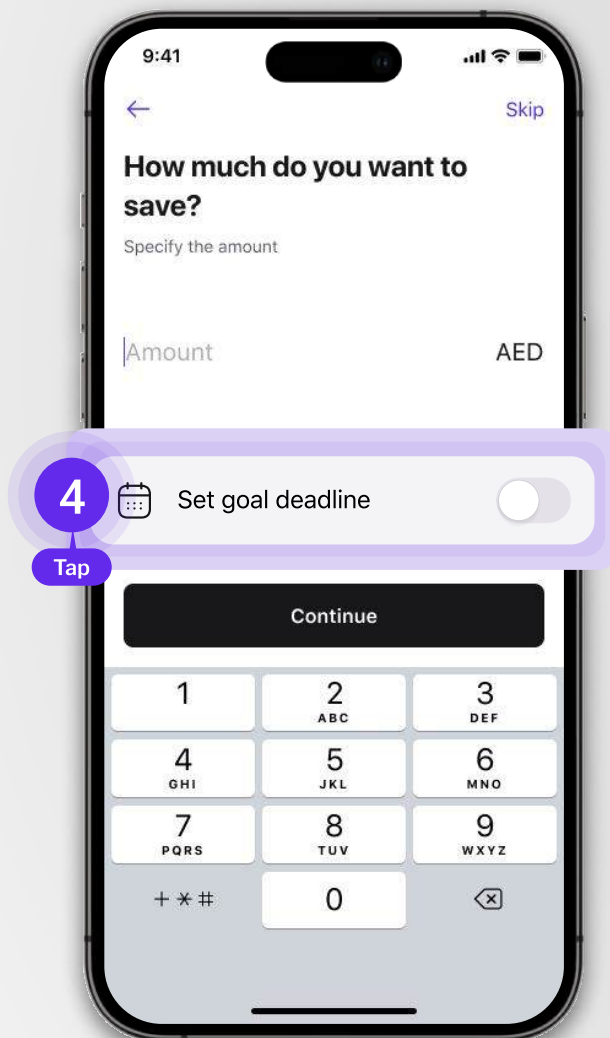


How to Set a Saving Goal

04.

Set Goal Deadline (Optional)

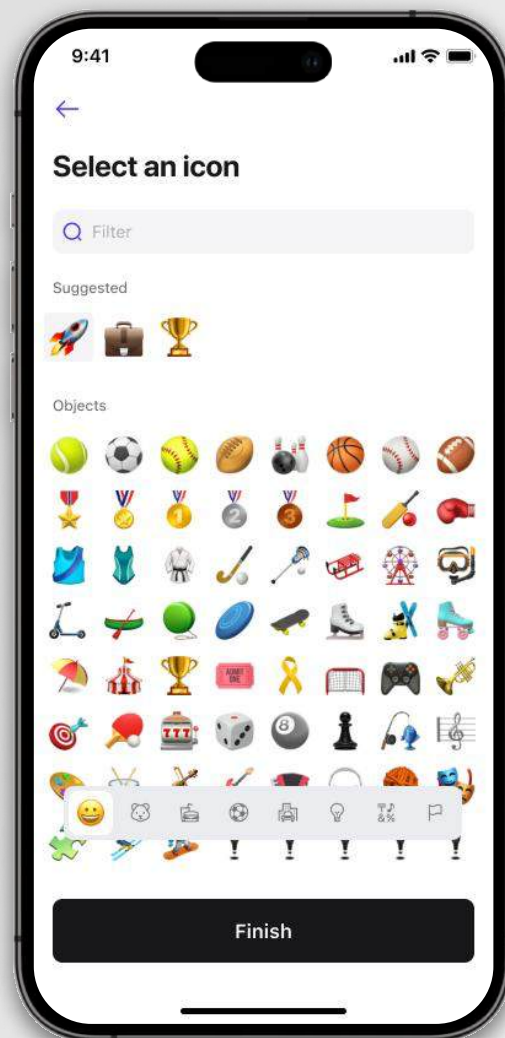
Choose a deadline to stay motivated and track progress.



05.

Choose an Icon

Select an icon to visually represent your goal.



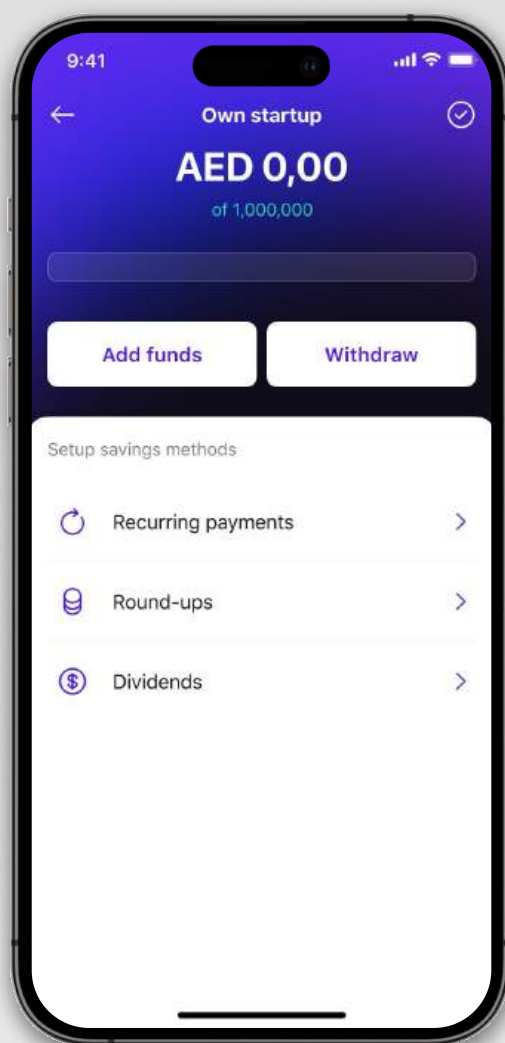
How to Set a Saving Goal

06 .

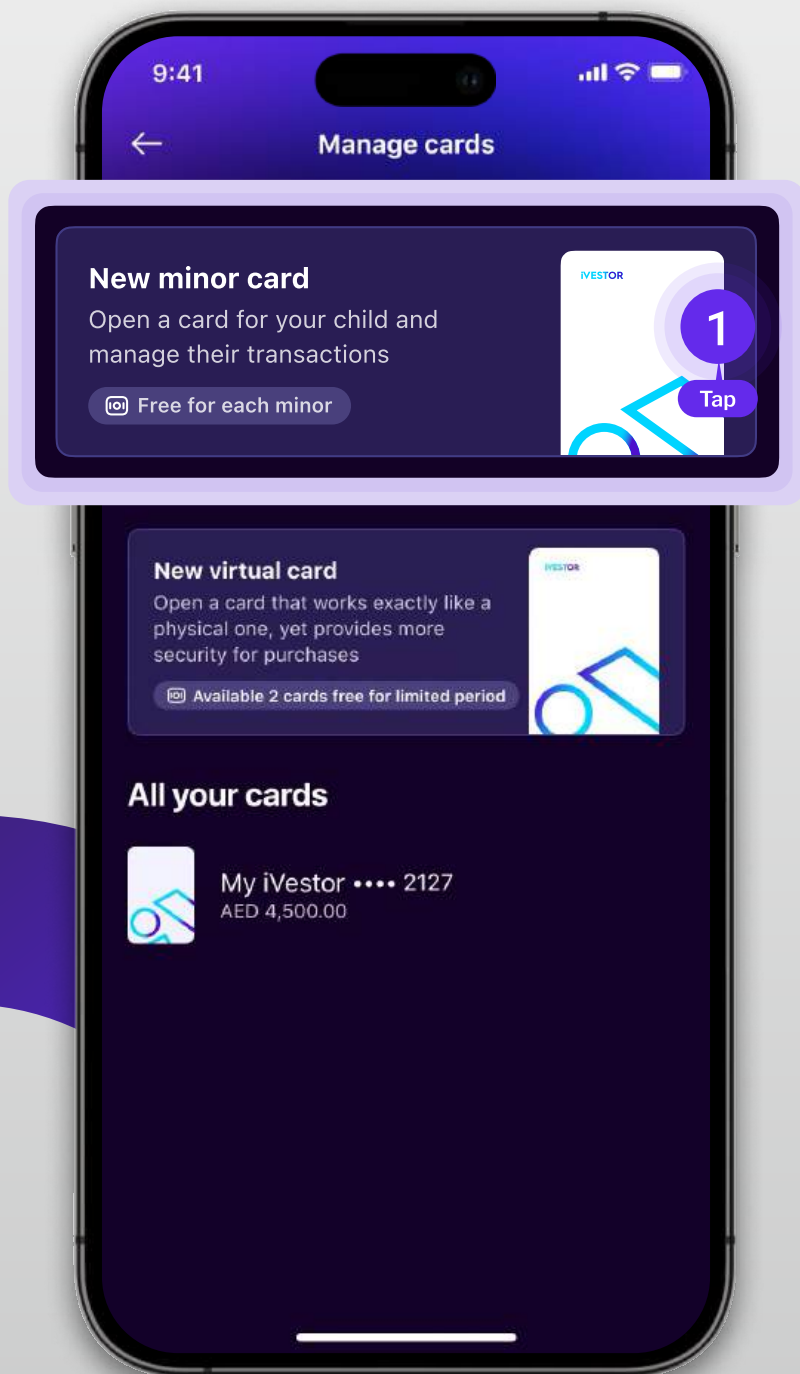
Goal Created Successfully

Your saving goal is ready to track and manage.

 You can set recurring payments to your savings goal through your dividends or by enabling round-ups.



How to Open a Minor Account



01.

New Minor Card

Go to the New Minor Card and tap Card creation for minors to begin.

How to Open a Minor Account

02 . Select Open Account

Start the onboarding process.

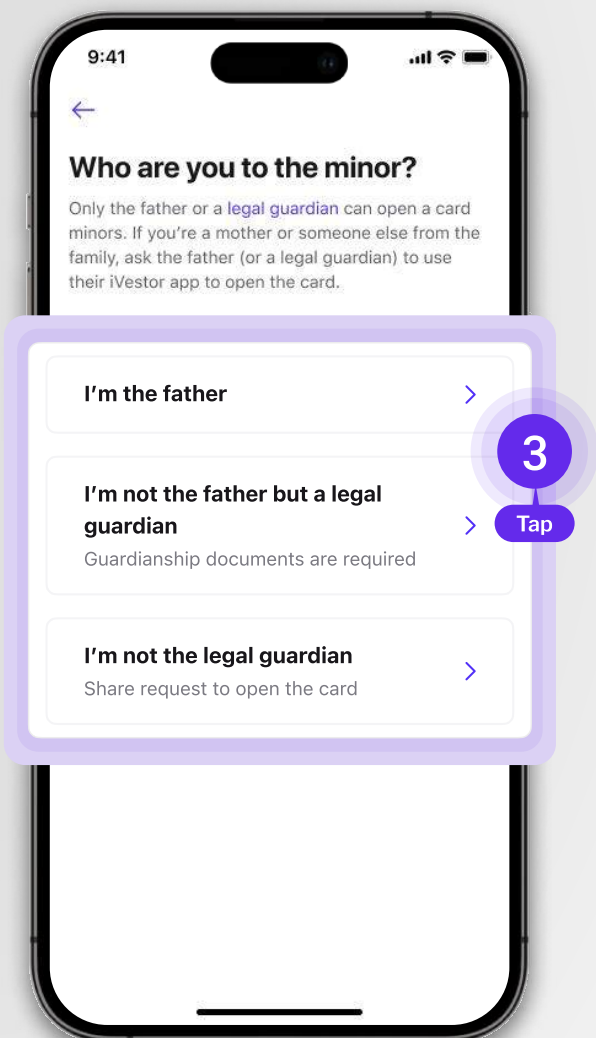
 If your minor is above 18 they can onboard on their own.



03 . Select Guardian Type

Confirm your relationship with the minor to continue.

 A court order is required if the guardian is not the father.

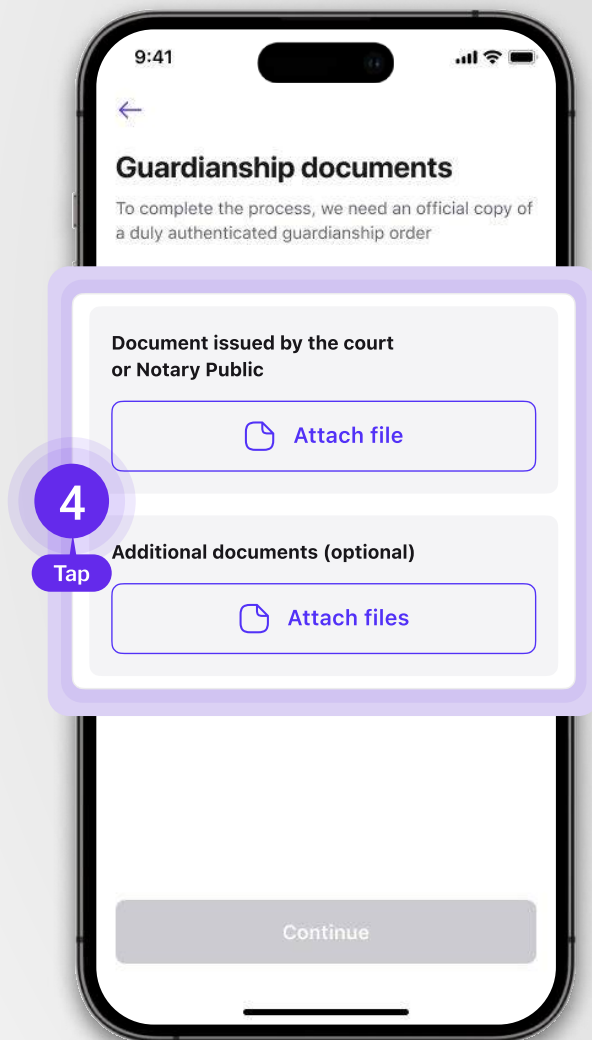


How to Open a Minor Account

04.

Upload Guardianship Documents

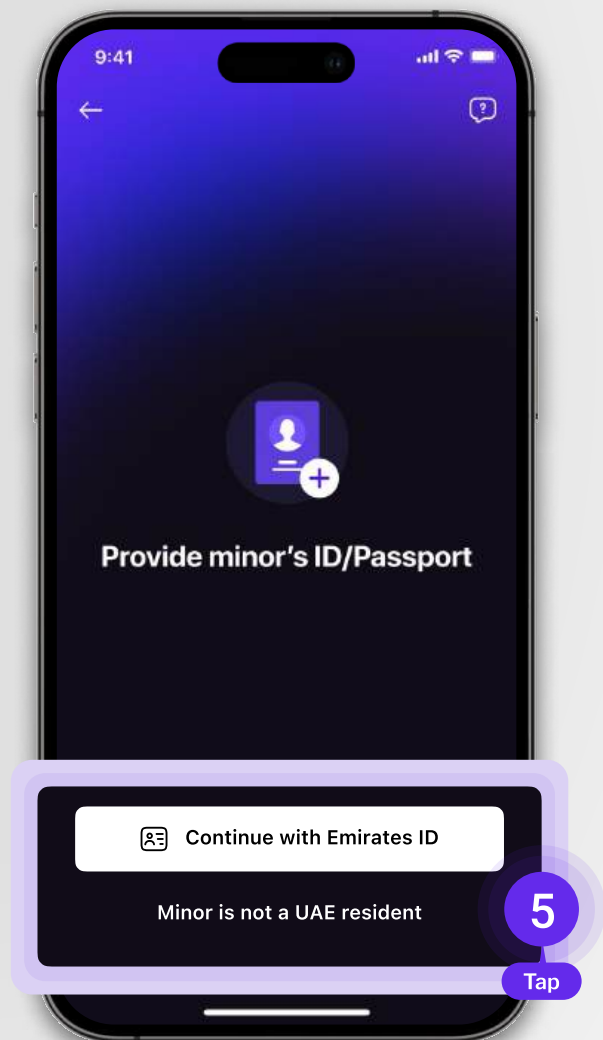
Provide official documents if you are a legal guardian.



05.

Provide Minor ID

Choose how to verify the minor's identity.



How to Open a Minor Account

06.

Scan Minor's ID

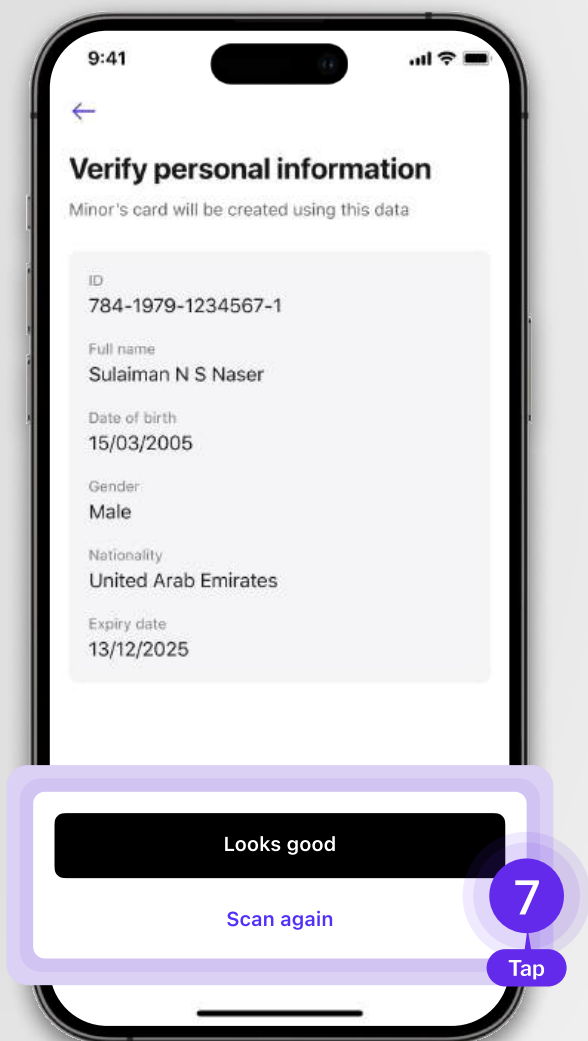
Capture a clear image of the ID for verification.



07.

Verify Information

Review and confirm the minor's personal details.



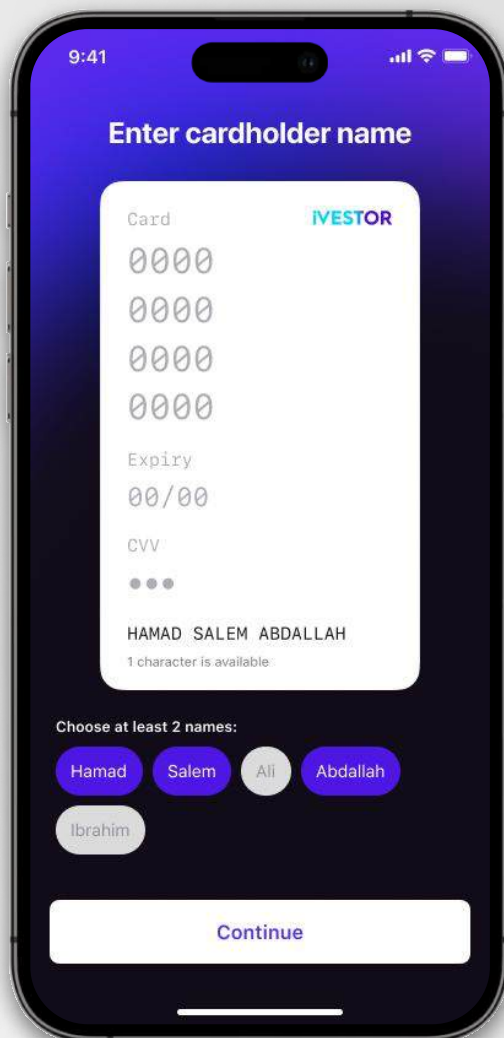
How to Open a Minor Account

08.

Set Card Name

Enter the name that will appear on the minor's card.

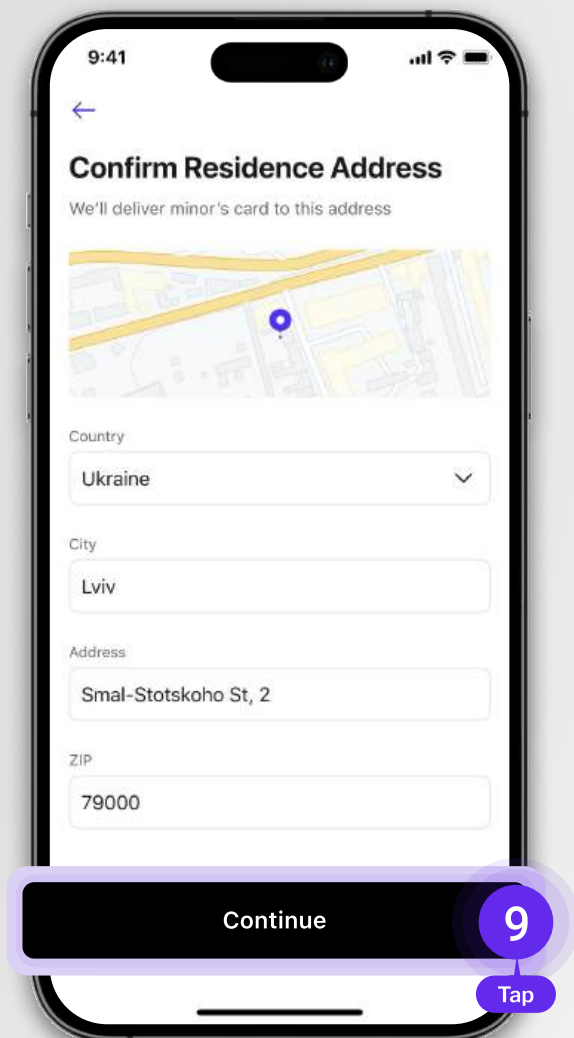
 Their card is digitally issued and can be added to Apple/Google Wallet.



09.

Confirm Residence Address

Ensure the card will be delivered to the correct location. If you chose to print your card.

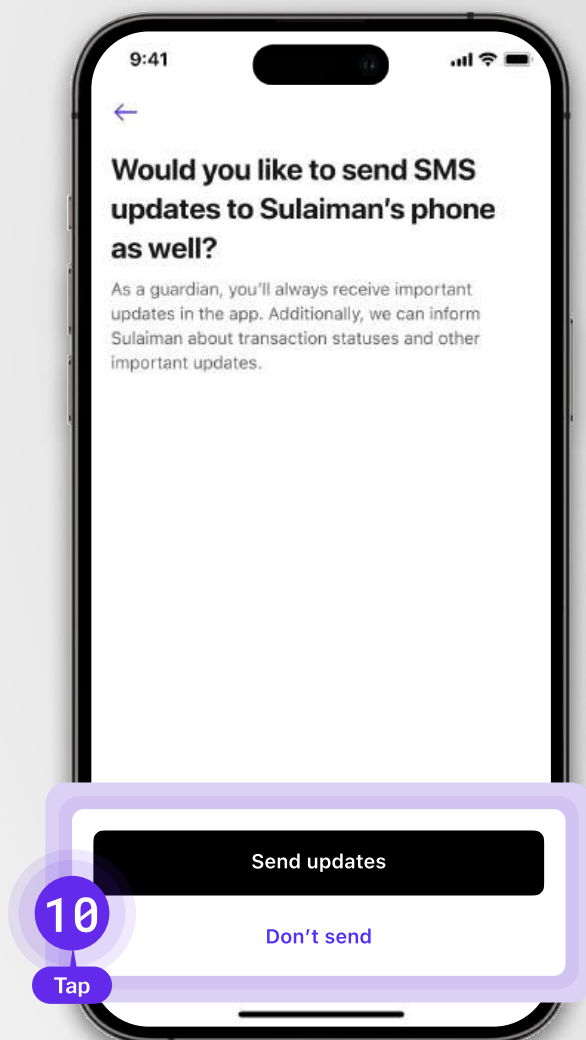


How to Open a Minor Account

10.

Enable Notifications (Optional)

Choose whether the minor receives SMS updates.

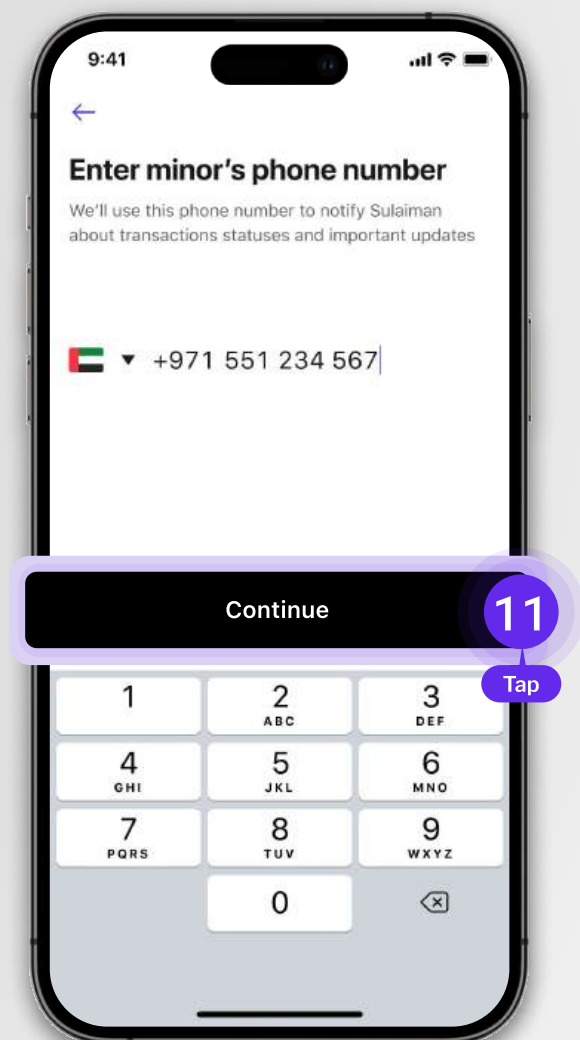


11.

Add Phone Number (Optional)

Enter the minor's phone number for notifications.

 You (the guardian) and your minor can both receive transactional SMS.



How to Open a Minor Account

12. Verify Phone Number

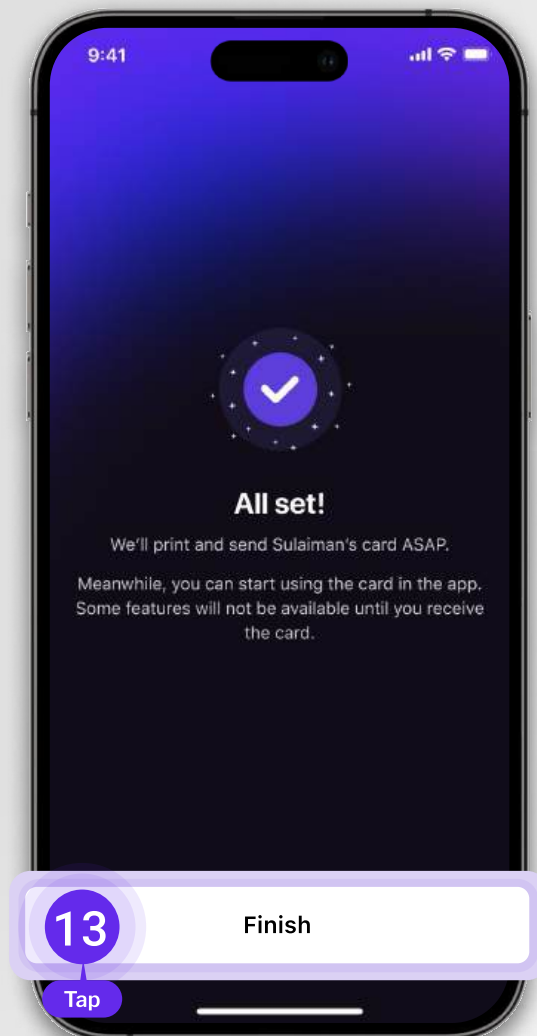
Enter the OTP sent to confirm the phone number.



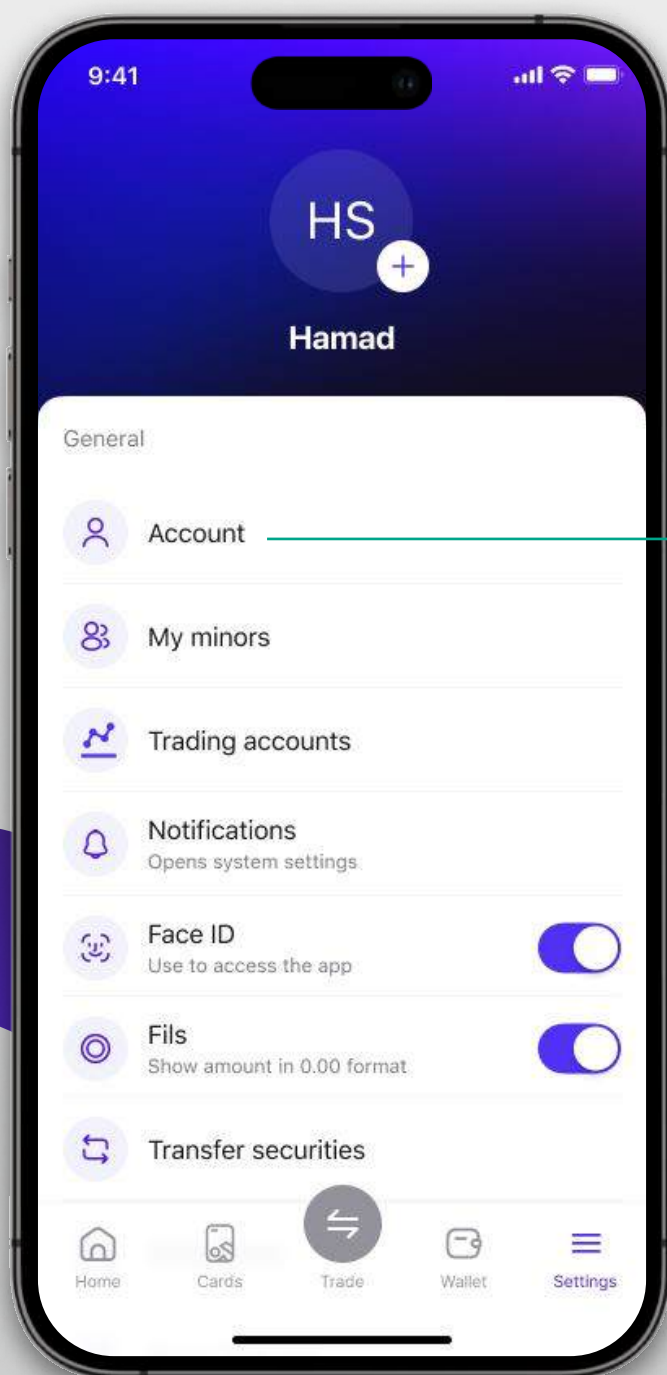
13. Account Created

The minor's card is being prepared and ready to use digitally.

ⓘ Usually takes 1-2 business days to be issued.



Account Settings & Profile Management



01.

View Account Details

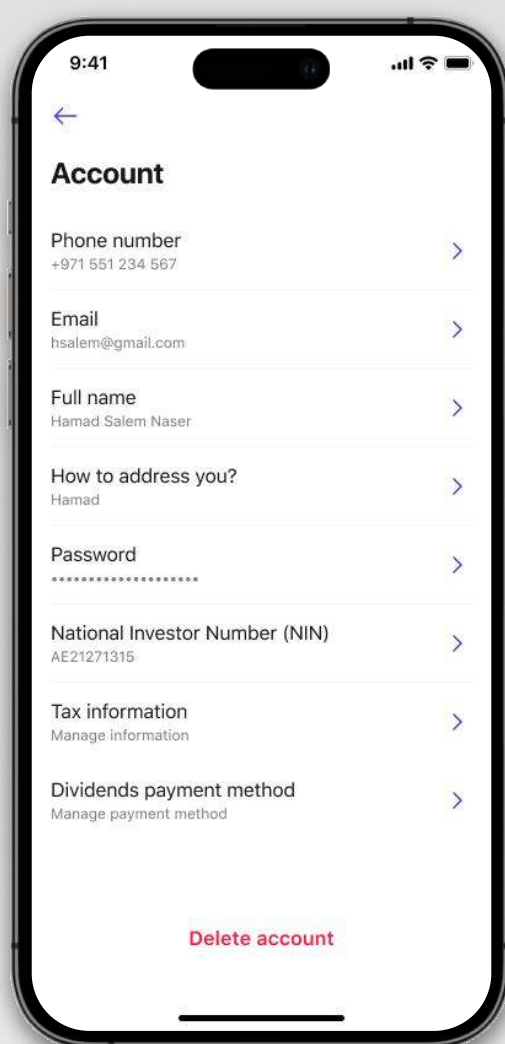
Check and update your personal account information.

Account Settings & Profile Management

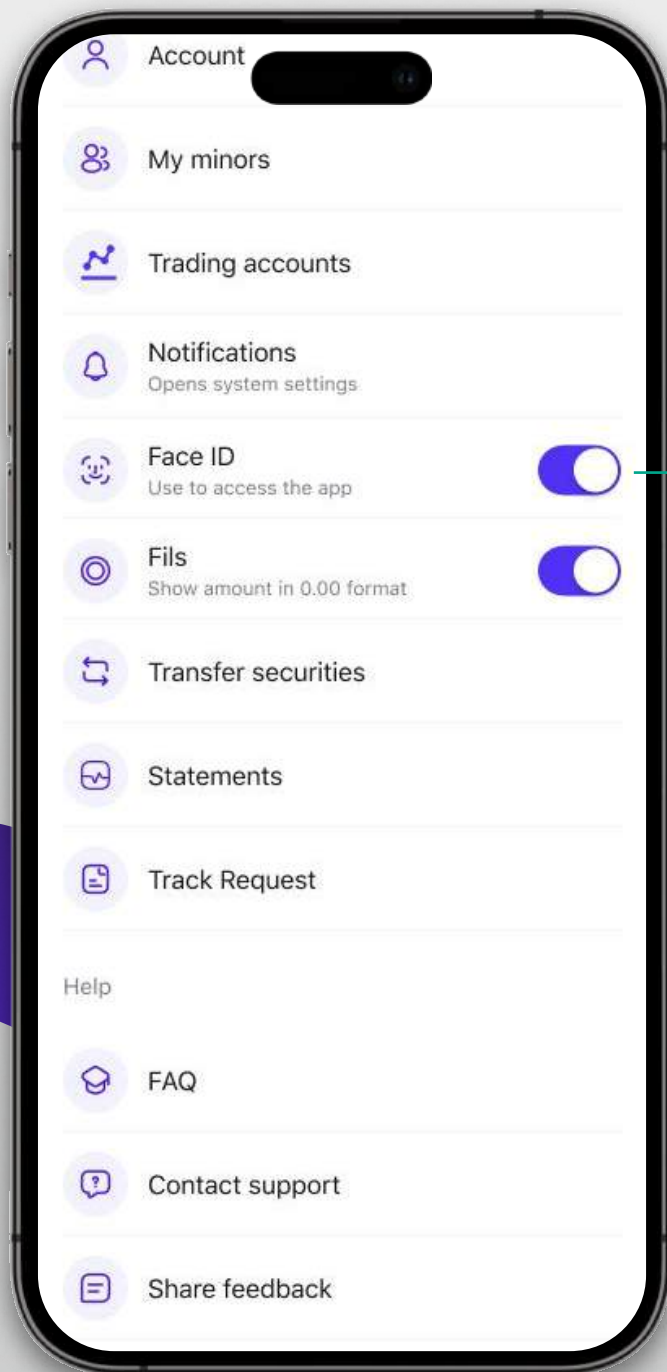
02.

Edit Account Information

Manage your personal and financial details.



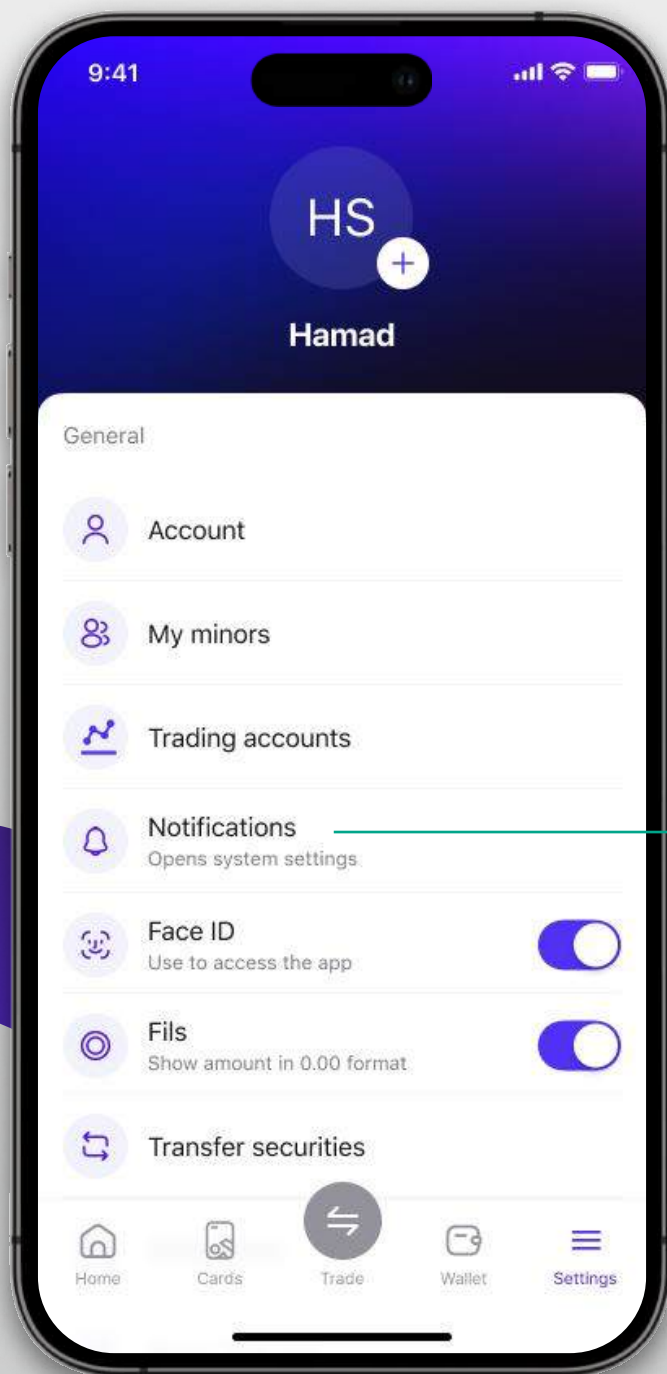
Security Features & Best Practices



01 . Enable Security Settings

Protect your account using built-in security features.

Notifications & Alerts



01.

Manage Notifications

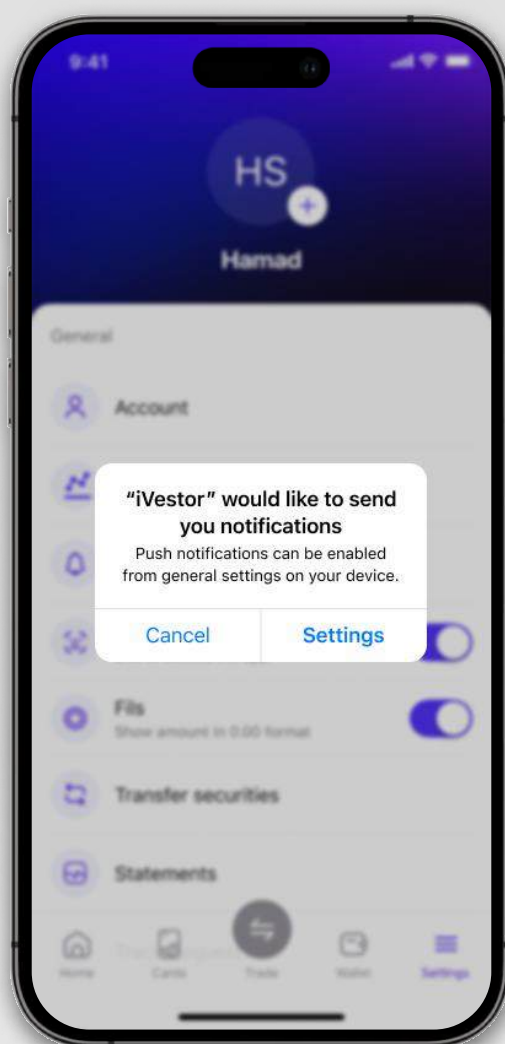
Control how you receive updates and alerts.

Notifications & Alerts

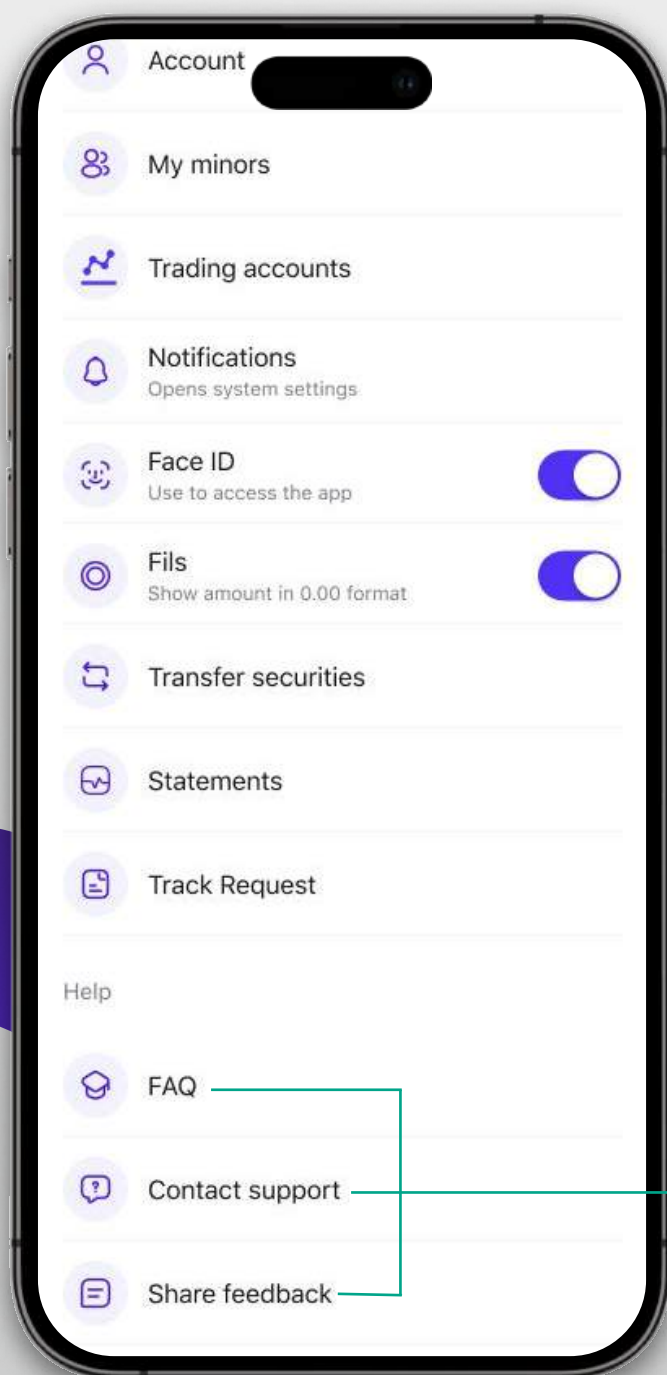
02.

Push Notification

Enable push notifications from here.



Help, Support & FAQs



01 .

Contact Support

Reach out for help through email or phone.

02.

Get Support

You can get support from here.

