

Wealth Dashboard in Online Banking

In today's fast-moving world, effective wealth management is key to achieving success.

But catching up with daily market movements, analysing your holdings, and forecasting gains can be a time-consuming process.

It's time for a brand-new approach to wealth management.

Introducing the HSBC Wealth Dashboard.

Designed with holistic wealth management in mind, wealth dashboard is a powerful online tool that consolidates all your holdings, giving you an overview of all your equities, funds, bonds, structured investments, alternatives, deposits and insurance policies all in one page.

You can easily view the details of your unit trusts, to get an instant summary of the investments current value, catch up on the latest related news, gain access to in-depth data and research, and instantly place trade orders around the clock, to help you capitalise on market movements.

You can also look up any unit trust distributed by HSBC, using our simple but powerful search to bring up in-depth information on the unit trusts of your choice.

Tracking your investments' performance is also a breeze.

With one simple click, you can view your foreign currency holdings denoted in Singapore dollars, instantly showing your returns after FX exposure.

You can also make use of the built-in Watchlist to track the performance on any listed securities, funds, or bonds and compare them to benchmarks such as market indices to help you make better investment decisions.

Powerful analysis tools are also available for you to breakdown your portfolio by assets, geography, sectors, and product types. <analyse and compare>

Performance Charts let you compare your holdings to market performance, paired with the latest updates relevant to the investment viewed.

Wealth Dashboard also provides you with a curated selection of market news and insights based on their relevancy to your current holdings.

Your transaction history is also tracked for up to two years, with every buy, sell, and dividend payout neatly organized into an easy-to-read table.

You can also view the details of each transaction, and as always, placing a new order is just one click away.

With so many innovative features and capabilities, wealth dashboard has everything you need to grow your wealth effectively and effortlessly.

HSBC's Wealth Dashboard, your one-stop online wealth management solution available on Personal Internet Banking and on Mobile and Tablet devices.

Logon today or speak to us to find out more.