



中策富滙證券有限公司
CS Wealth Securities Limited



————— APP User Guide —————



Android users can scan the QR code above to download the app.



iPhone users can scan the QR code above to download the app.





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Structured Product Account Opening

01

Account Opening



Required Documents:

1. Identification document
2. Address proof
3. Bank account proof






Enter mobile phone number and set password.

14:45

<



CS Wealth Securities

[SMS Login](#) [Pwd Login](#) [Securities Account](#)

+852 12345678

Login/Register

Unregistered mobile number will be registered

Agree to and comply with the [Registration Agreement](#) and [Privacy Policy](#)

Contact CS

14:45

<

Get Login Verification Code

Sent to +852 12345678

55s Resend

Note:
The maximum limit of sending SMS one time verification code is 8 per hour and 30 per day

14:45

<

Set your login password

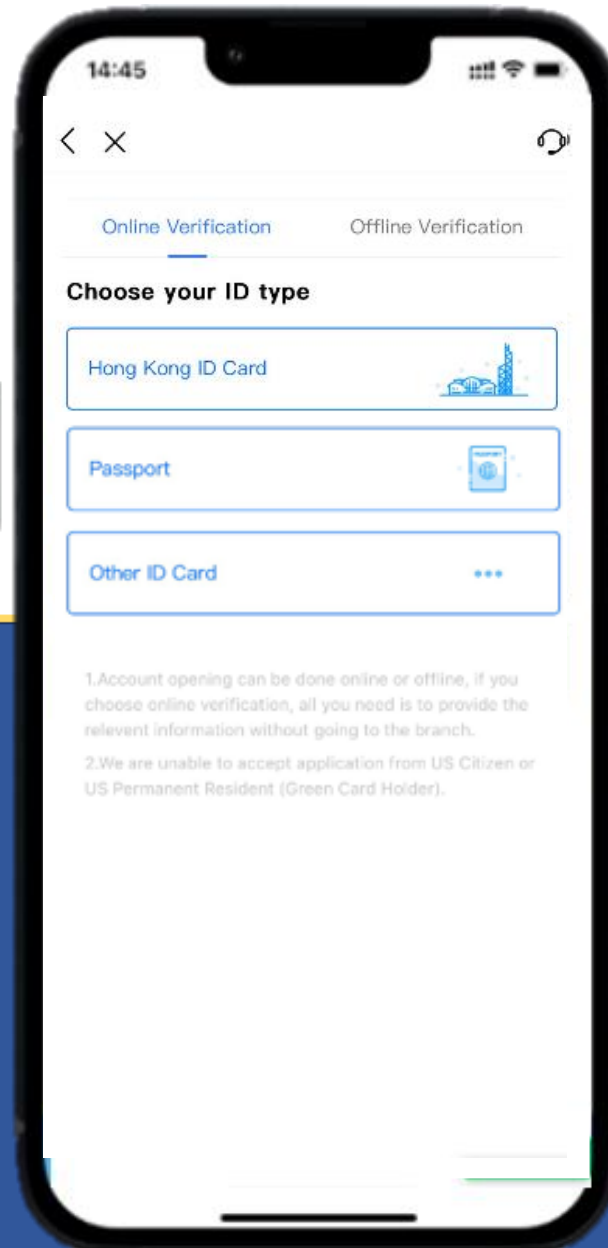
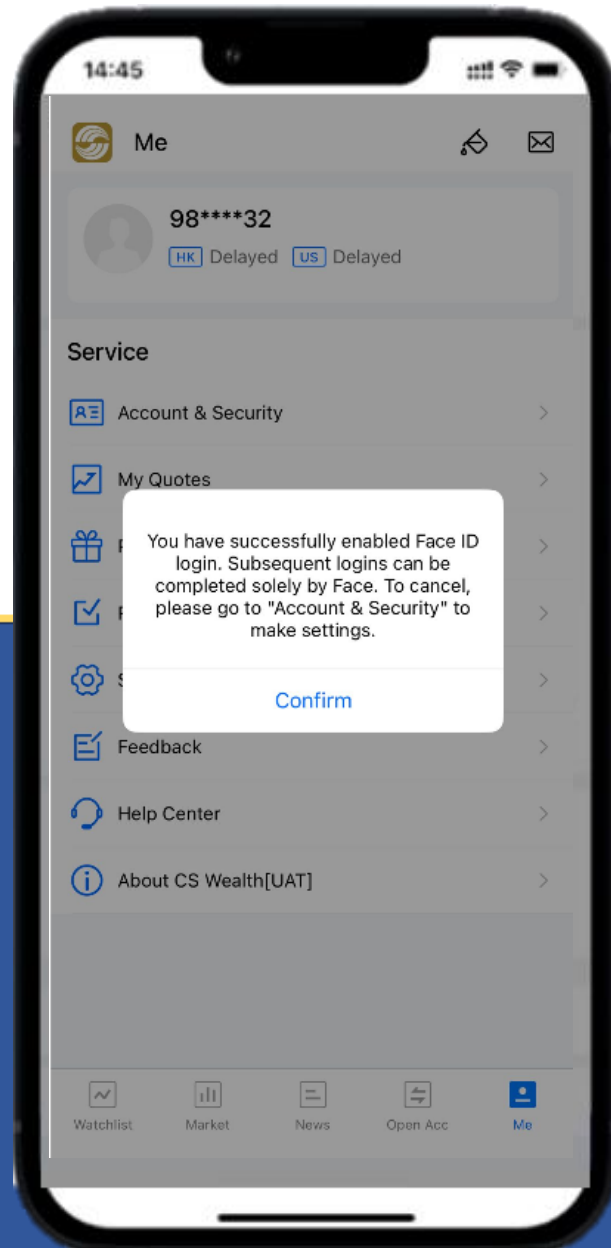
Password

8-24 Characters

Confirm



After logging in with Face ID, select the identification document type for account opening.





Enter personal information and upload the identification document.

14:45

< ×

Personal info. Financial Info. Risk Assessment. Employment info.

Solely for account opening

Upload Again

Please provide the details of identity document ID Card information Info

ID/Passport/HKDI No.

M556789(1)

Chinese Name

陳寶

English Name

Chan Po

Basic Information

Gender

Continue

14:45

< ×

Personal info. Financial Info. Risk Assessment. Employment Info.

Financial Background

Annual Income (HKD)

360,001-600,000

Total Net Worth (HKD)

1,000,001 – 5,000,000

Source of Wealth(Multiple choices)

Salary,Commission,Family Income,Inves

Investment Background

Investment Objective

Dividend Income

Experiencedproducts(Multiple choices)

Securities,Derivative Warrants,ETFs,Str

Equities Investment Experience

Back Continue

14:45

< ×

Personal info. Financial Info. Risk Assessment. Employment Info.

1.Risk Tolerance and Client Investment Interest

RiskTolerance

Aggressive

Moderate

Conservative

2.Client Investment Interest (one or more item(s))

(请选择以下有意欲交易之产品)

Futures or options

Structured Products

Derivative Warrants / Callable Bull / Bear Contracts

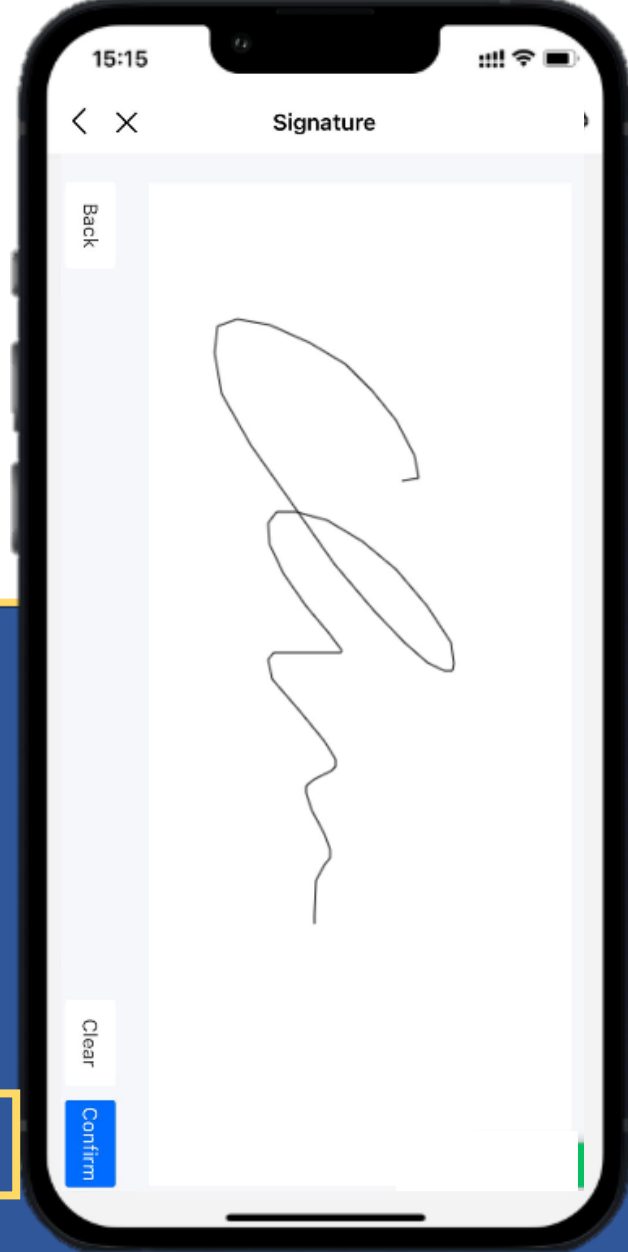
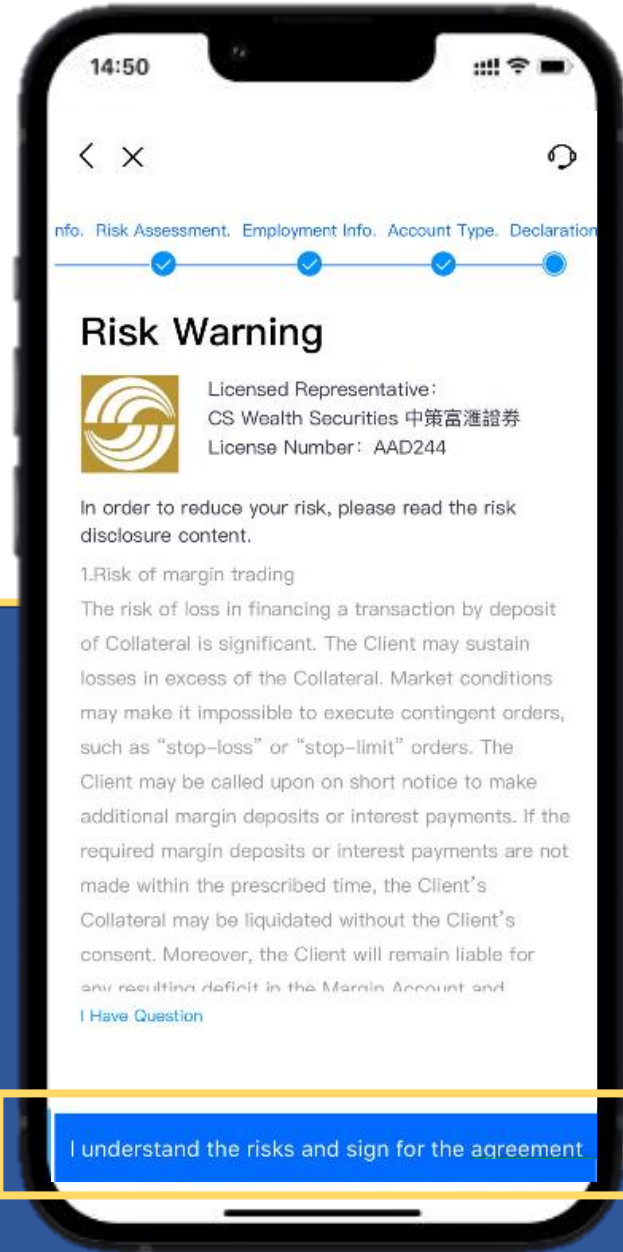
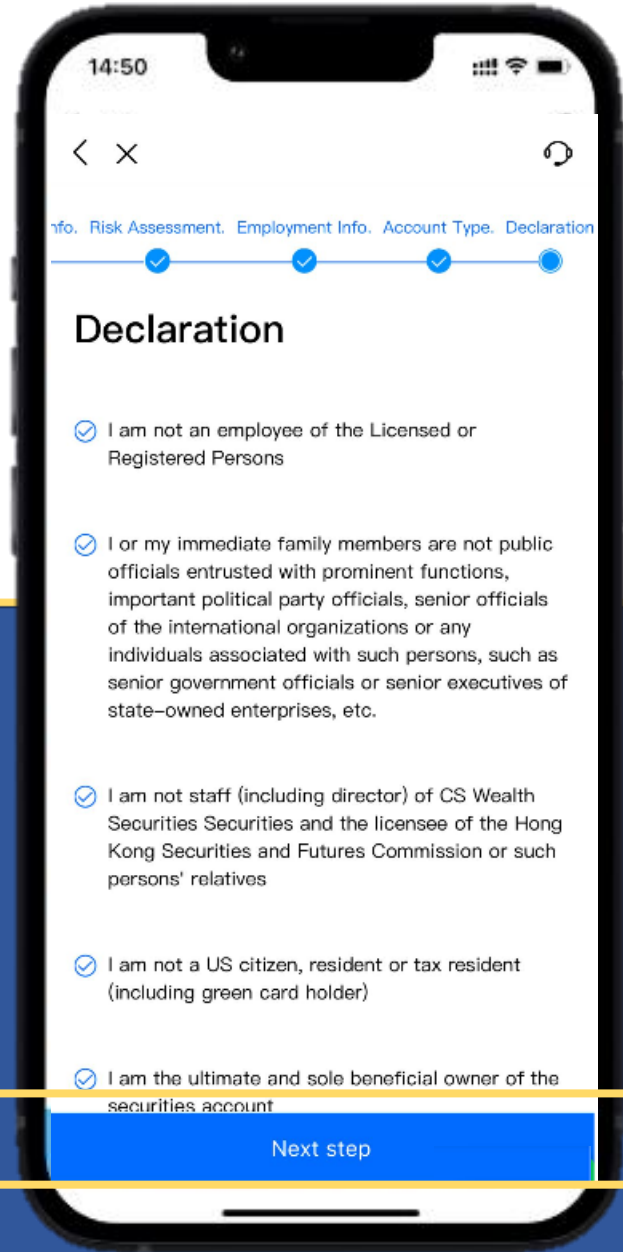
ETFs

GEM

MainBoard

continue

Read the information, scroll to the bottom, and click "Next step". Record a video to verify identity and set up signature.



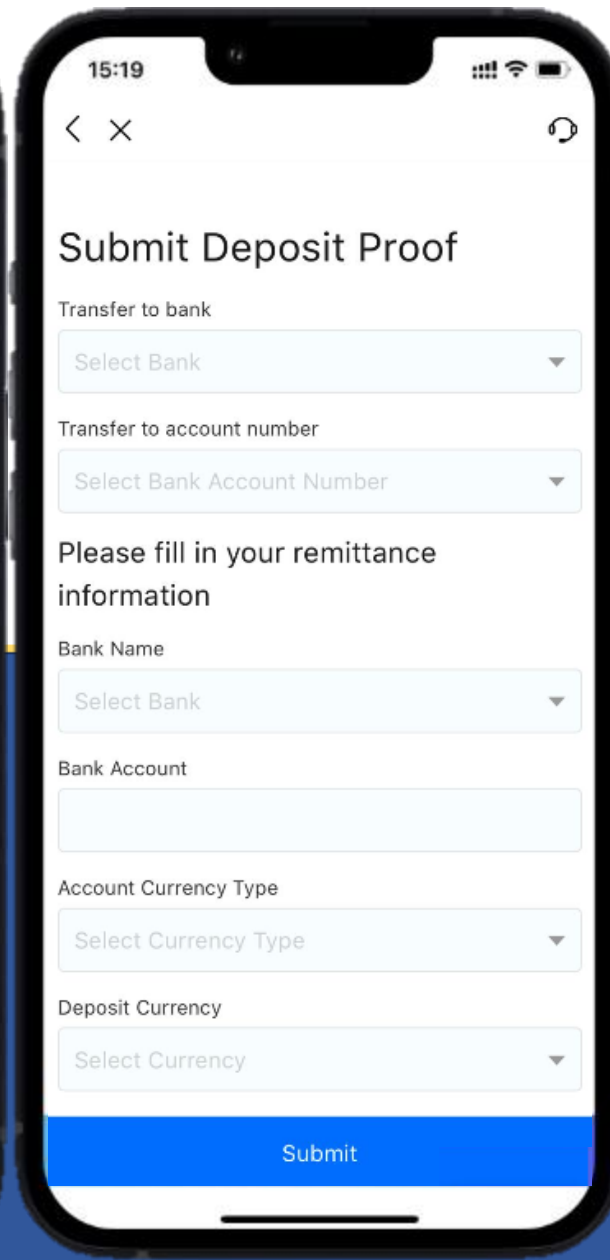
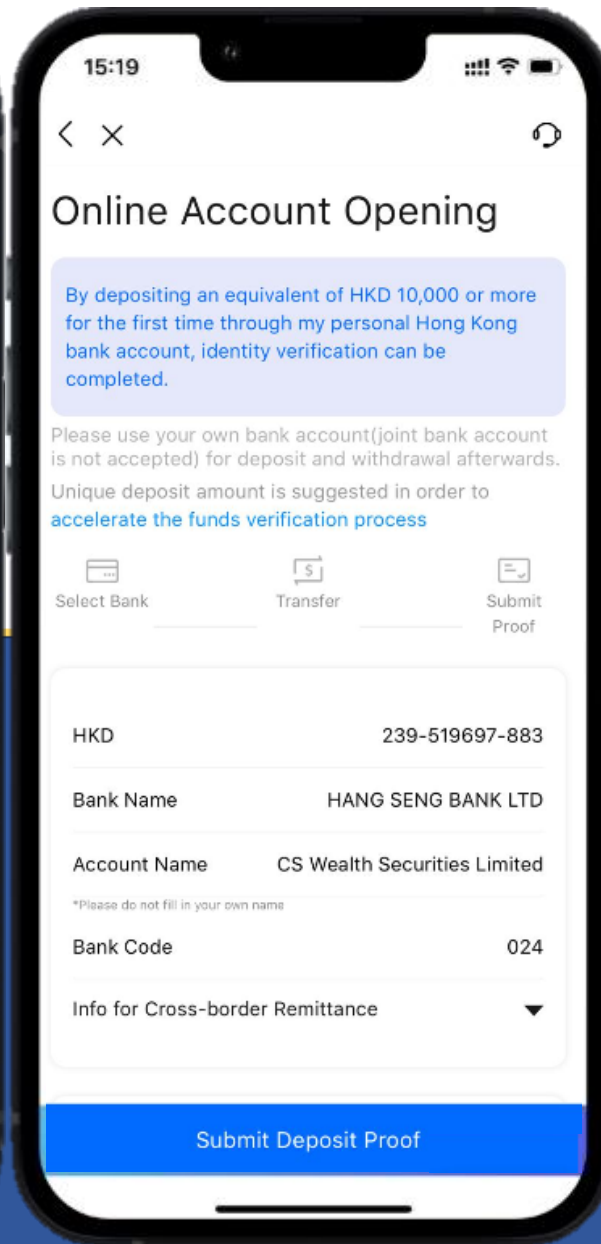
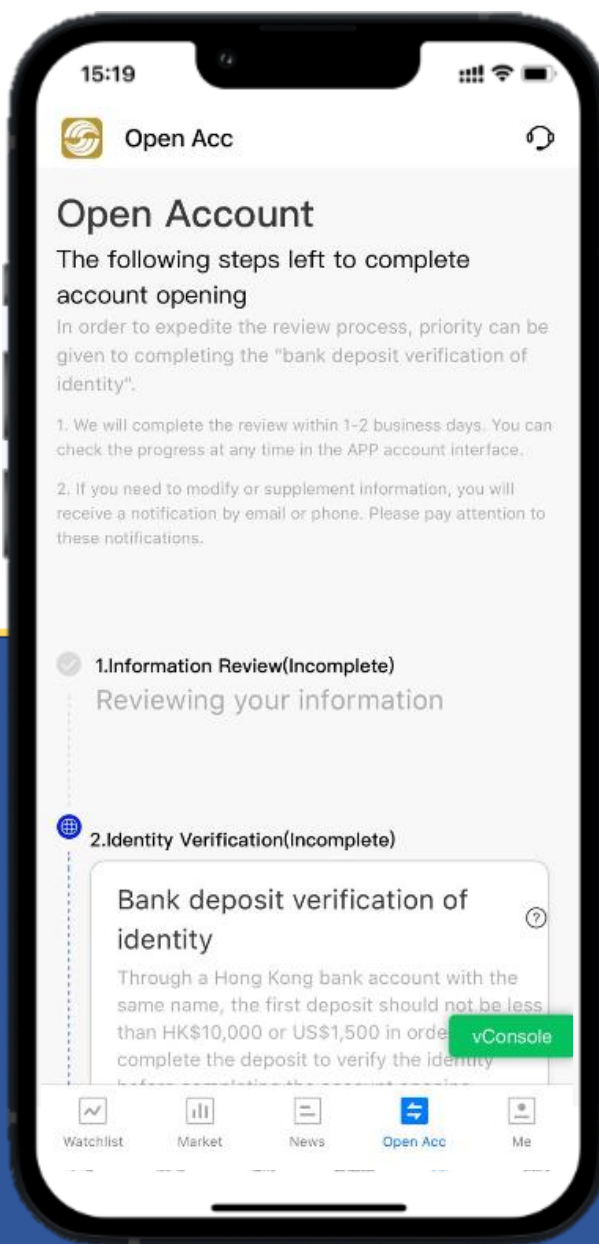
Deposit



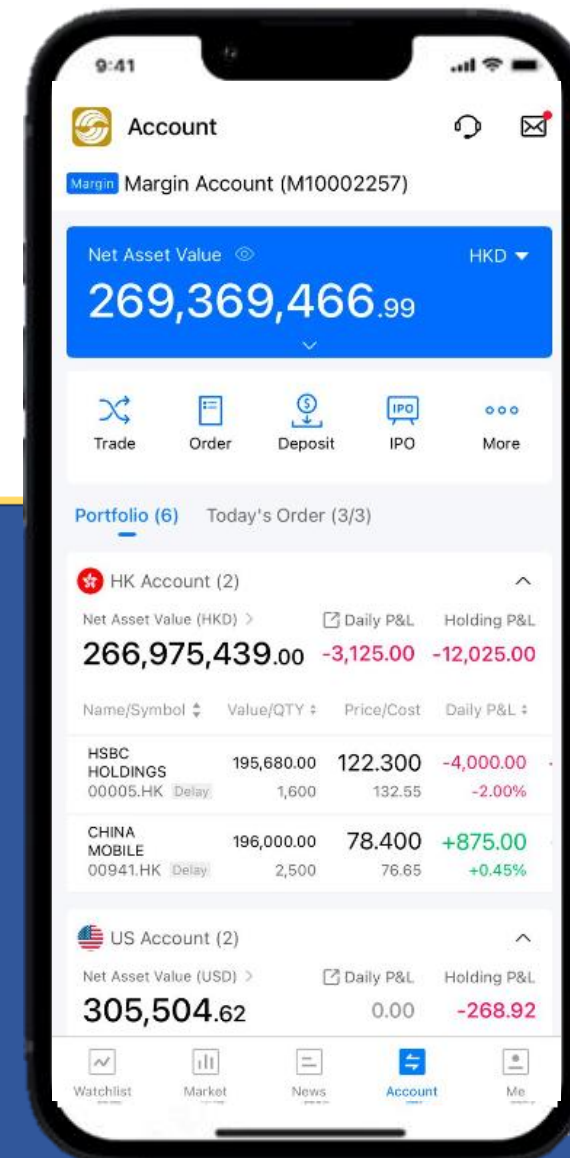
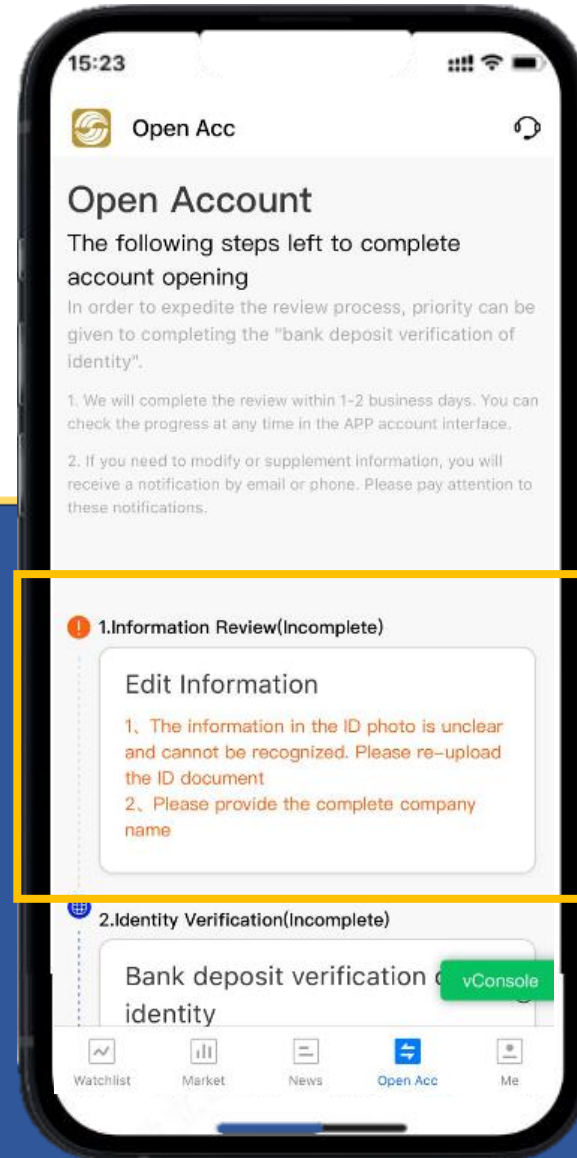
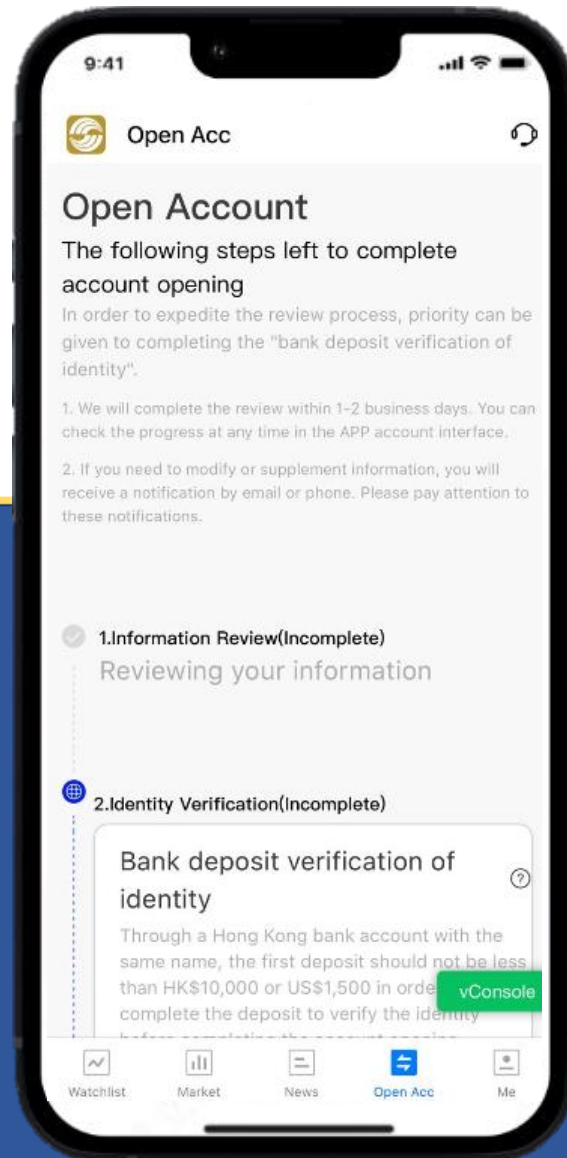
- HKD 10,000 or
- USD 1,500

and link a bank A/C
to complete identity
verification.

Please note that the
transfer must be
made from a bank
account under the
user's own name.
Joint bank accounts
are not accepted.



Check account opening status. If necessary, follow the instructions to provide supporting documents or supplementary information.



02


Interface

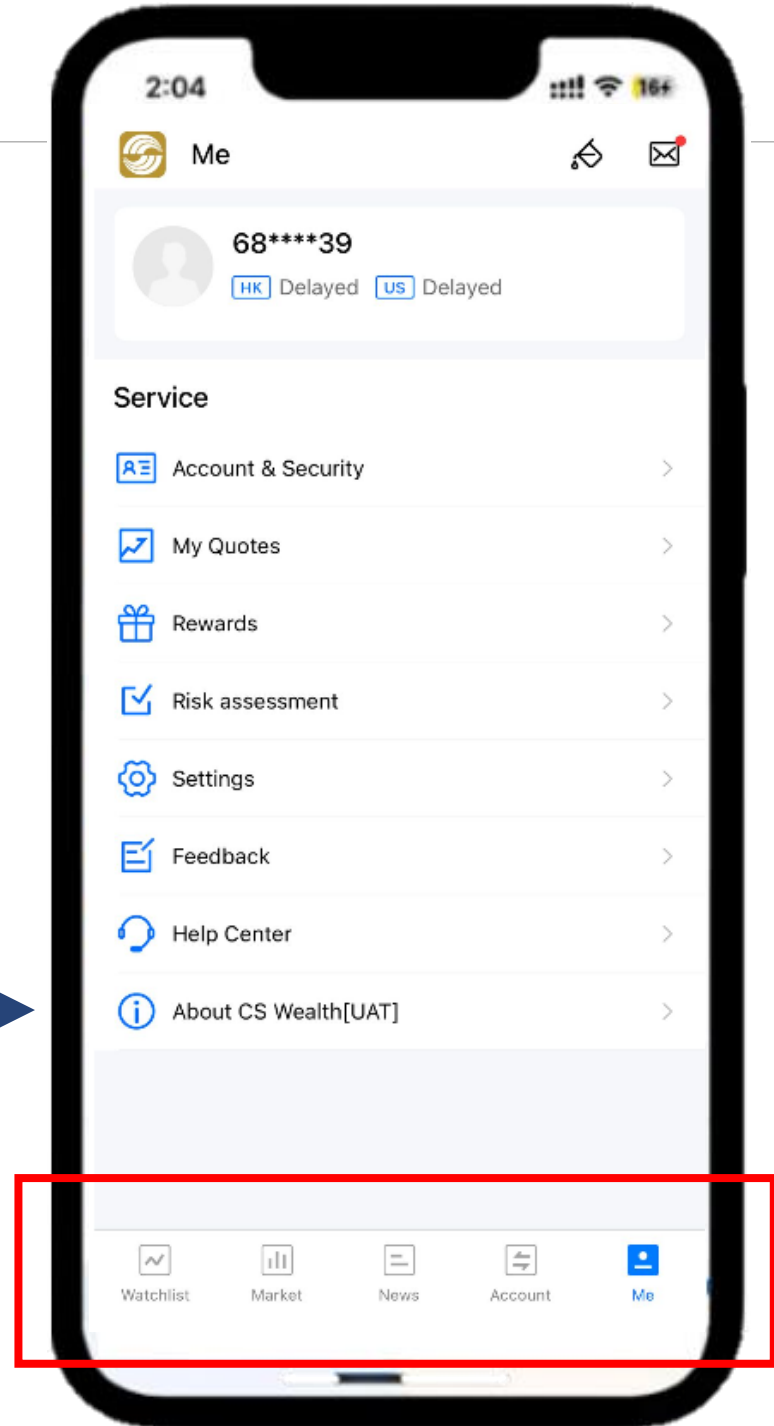

Watchlist


News


Me


Market

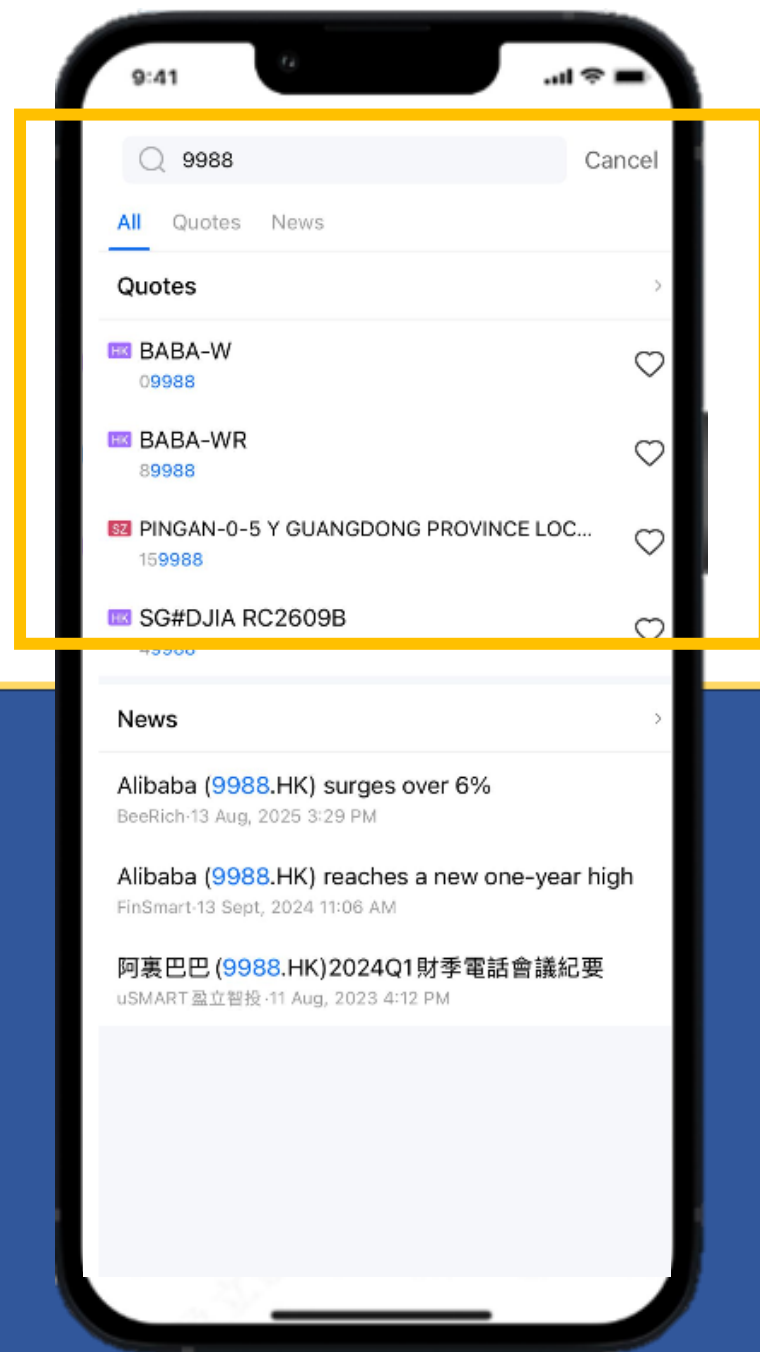
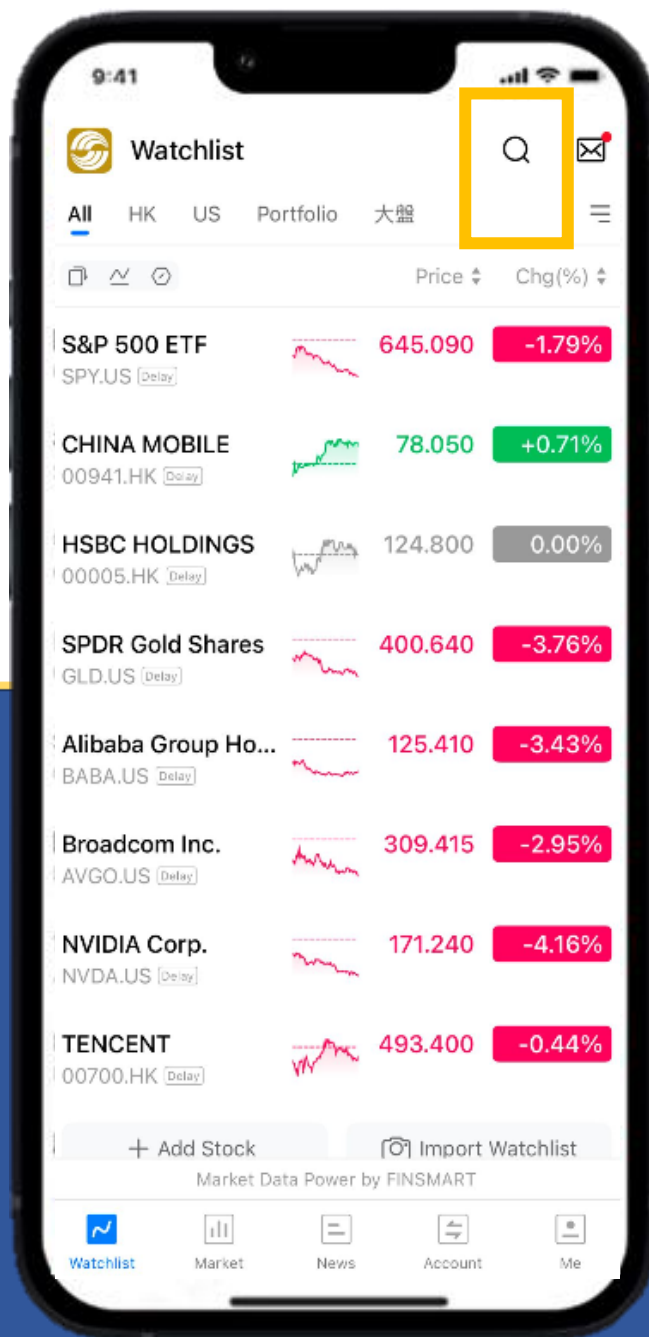

Account



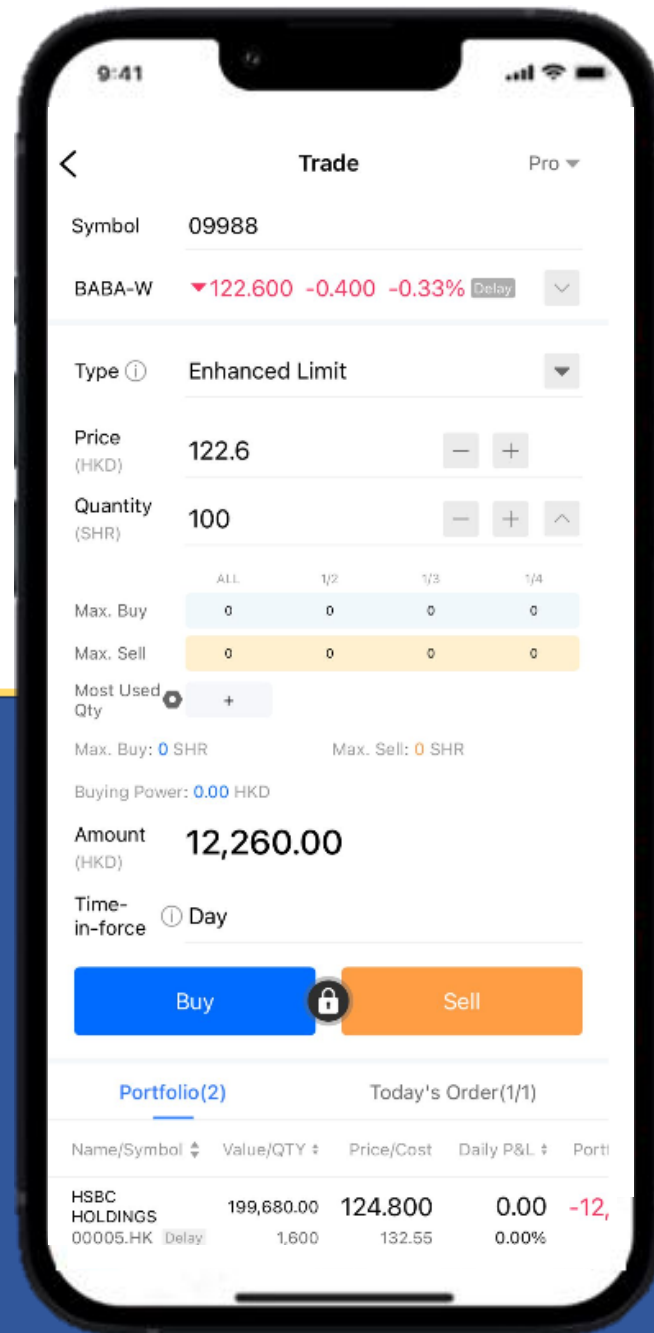
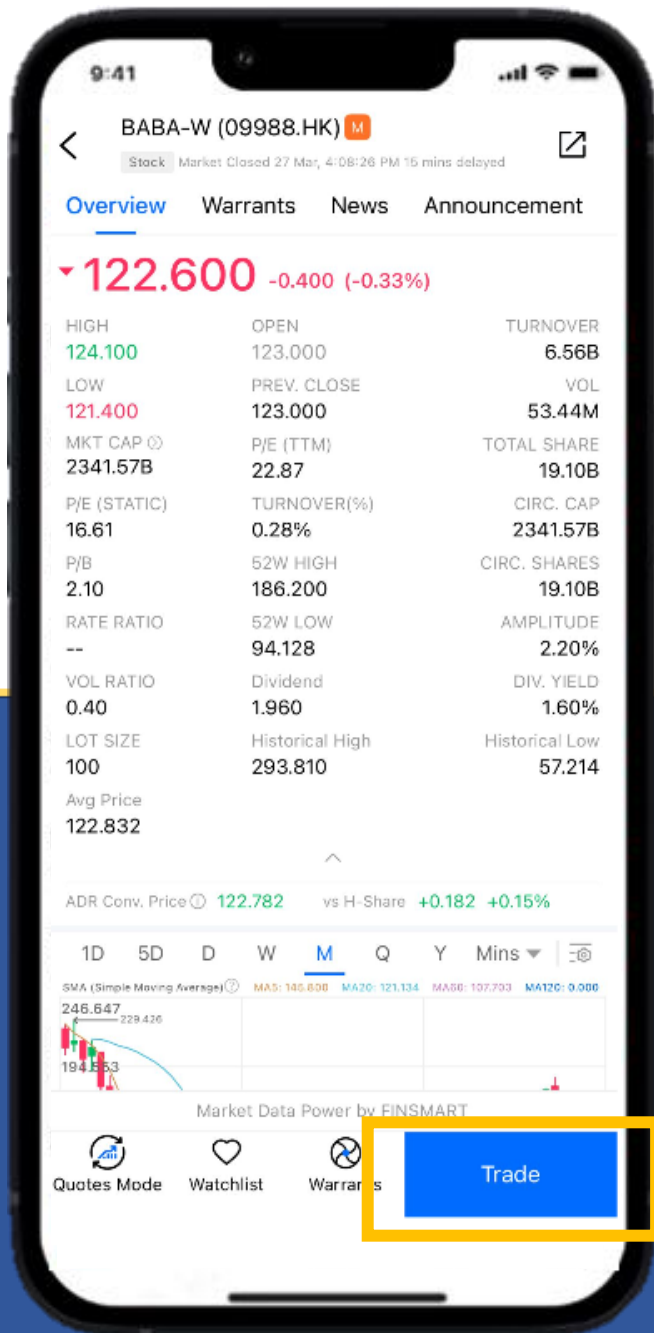
“ Watchlist ”



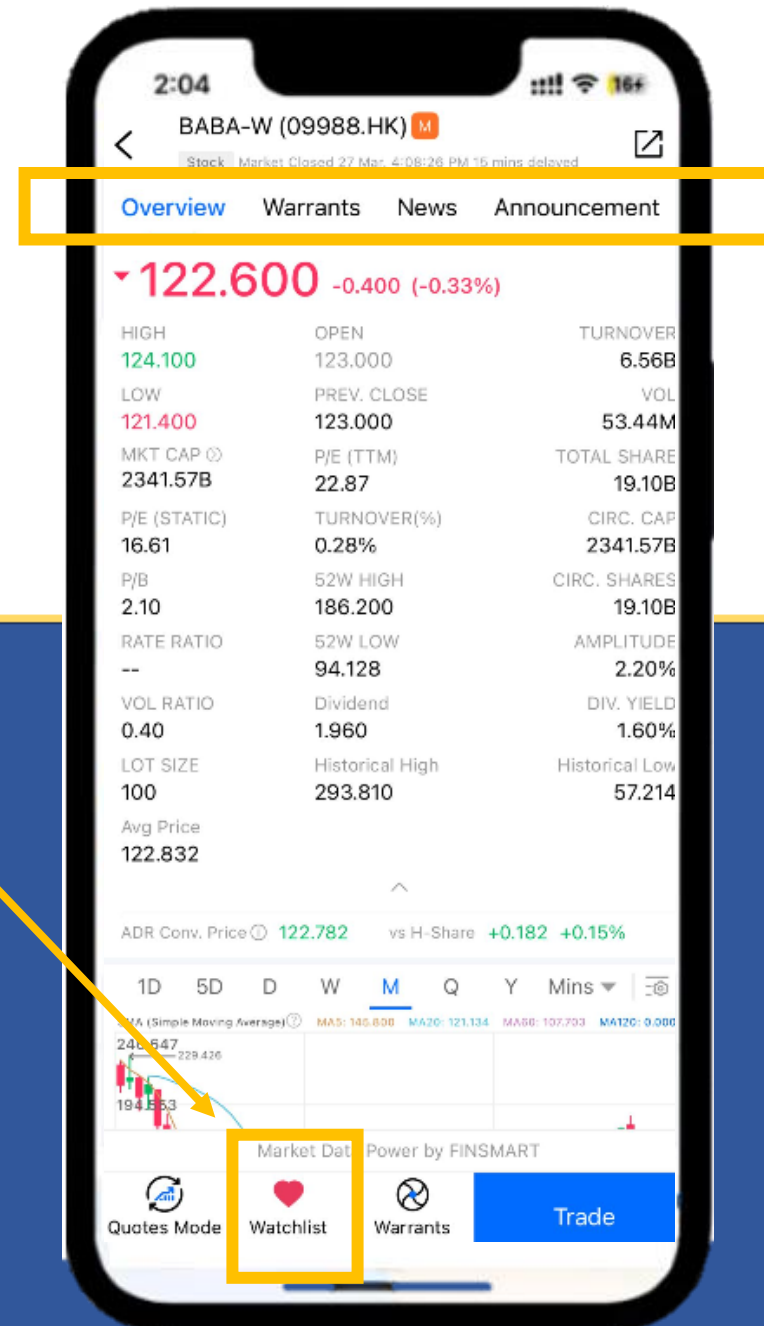
You can press the “ Q ” button to enter a stock code and view its information.




Click the stock symbol to proceed to the trading page and place order.



You can view "Overview", "Warrants", "News", and other information.



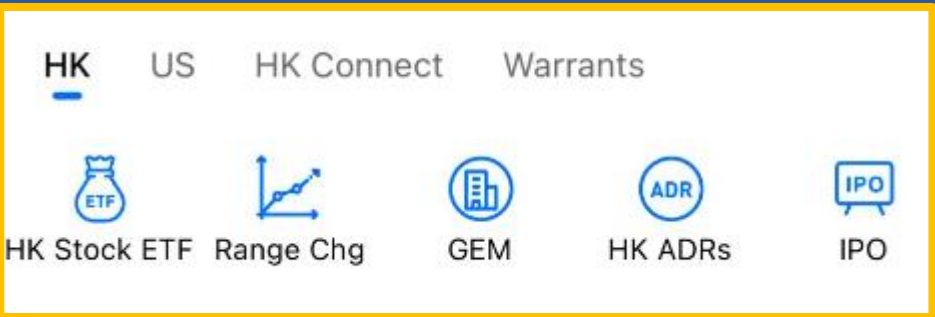
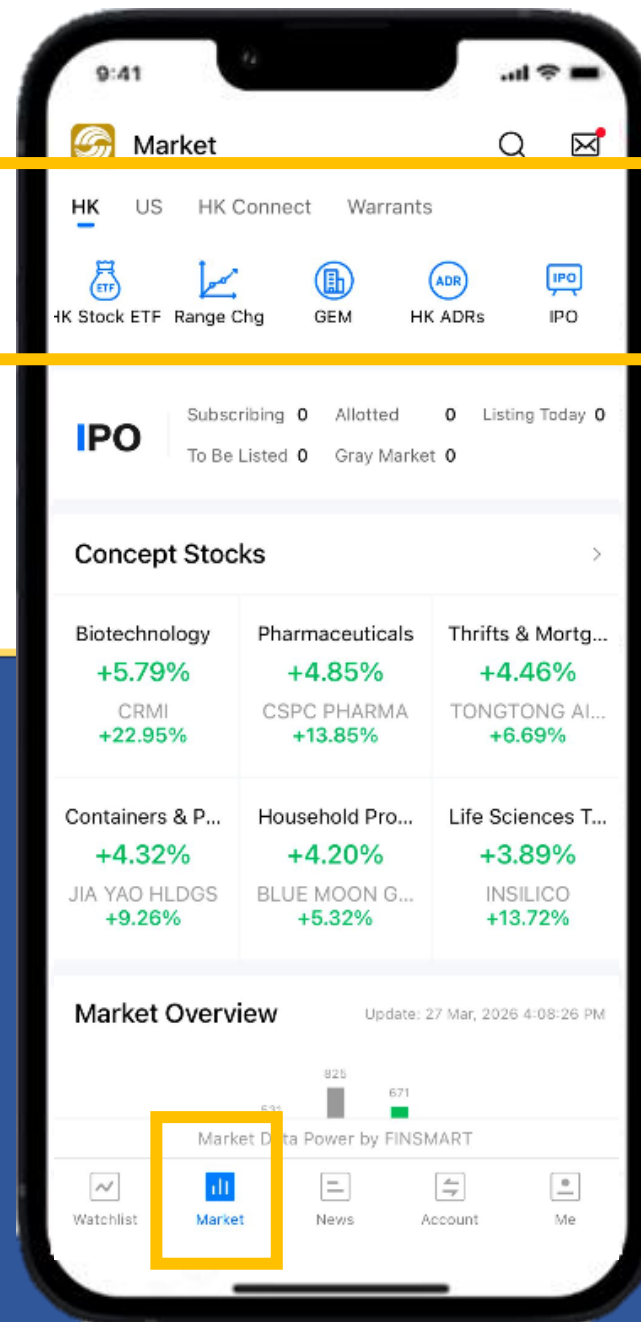
You can also click “ Watchlist” at the bottom to add stocks to the watchlist and categorize them into "Hong Kong Stocks", "US Stocks", etc., for quick daily reference.

“Market”

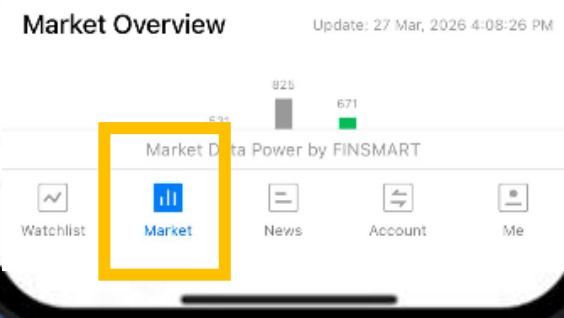


Market

You can search for “Hong Kong stocks”, “US stocks”, “Hong Kong Stock Connect”, and “warrants”, as well as IPO or Hong Kong stock ETFs.



Concept Stocks		
Biotechnology +5.79% CRMI +22.95%	Pharmaceuticals +4.85% CSPC PHARMA +13.85%	Thrifs & Mortg... +4.46% TONGTONG AL... +6.69%
Containers & P... +4.32% JIA YAO HLDGS +9.26%	Household Pro... +4.20% BLUE MOON G... +5.32%	Life Sciences T... +3.89% INSILICO +13.72%

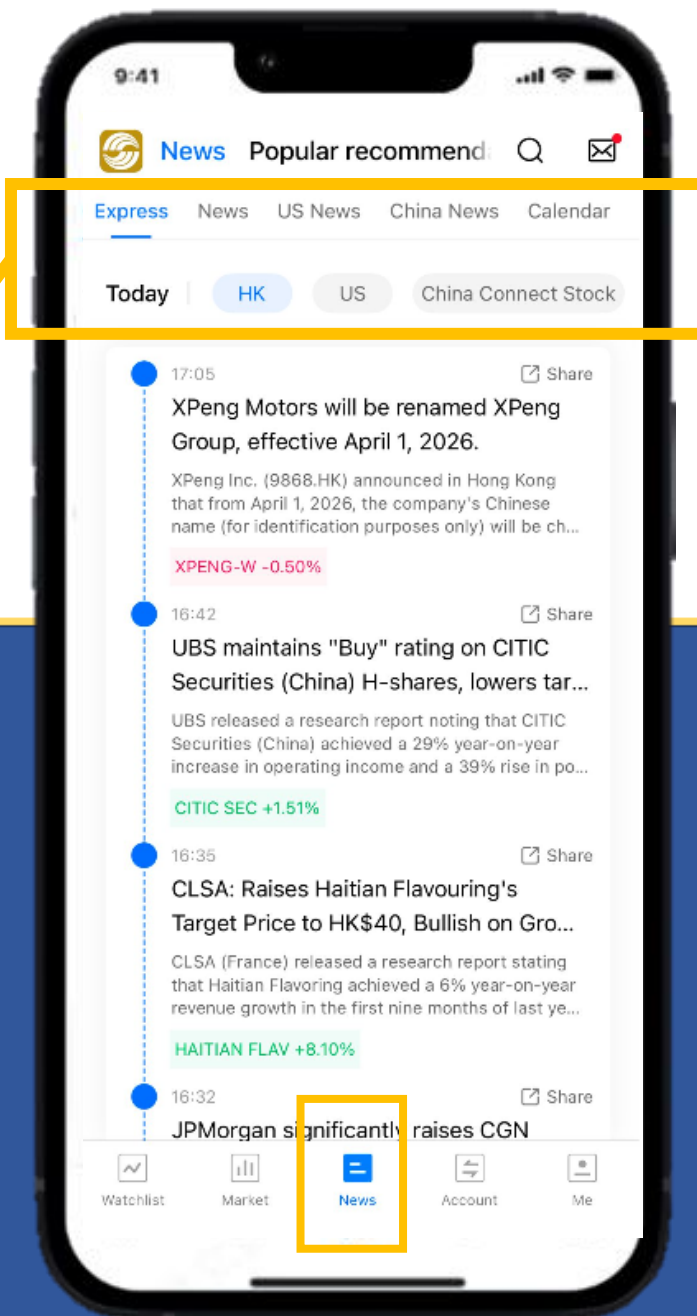
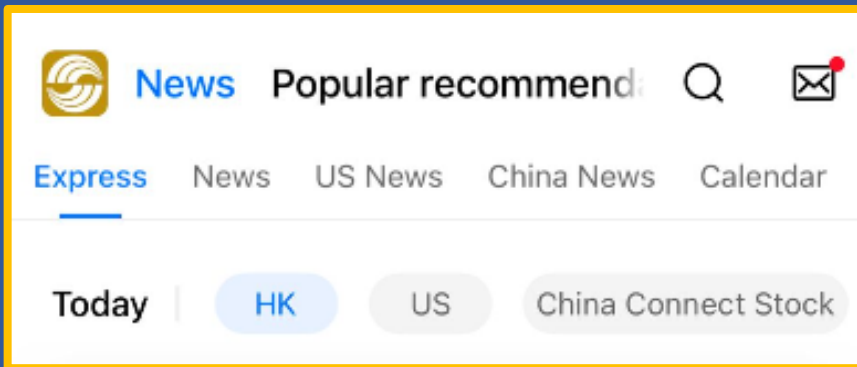


“News”



News

Quickly browse flash news, financial headlines and upcoming financial reports.

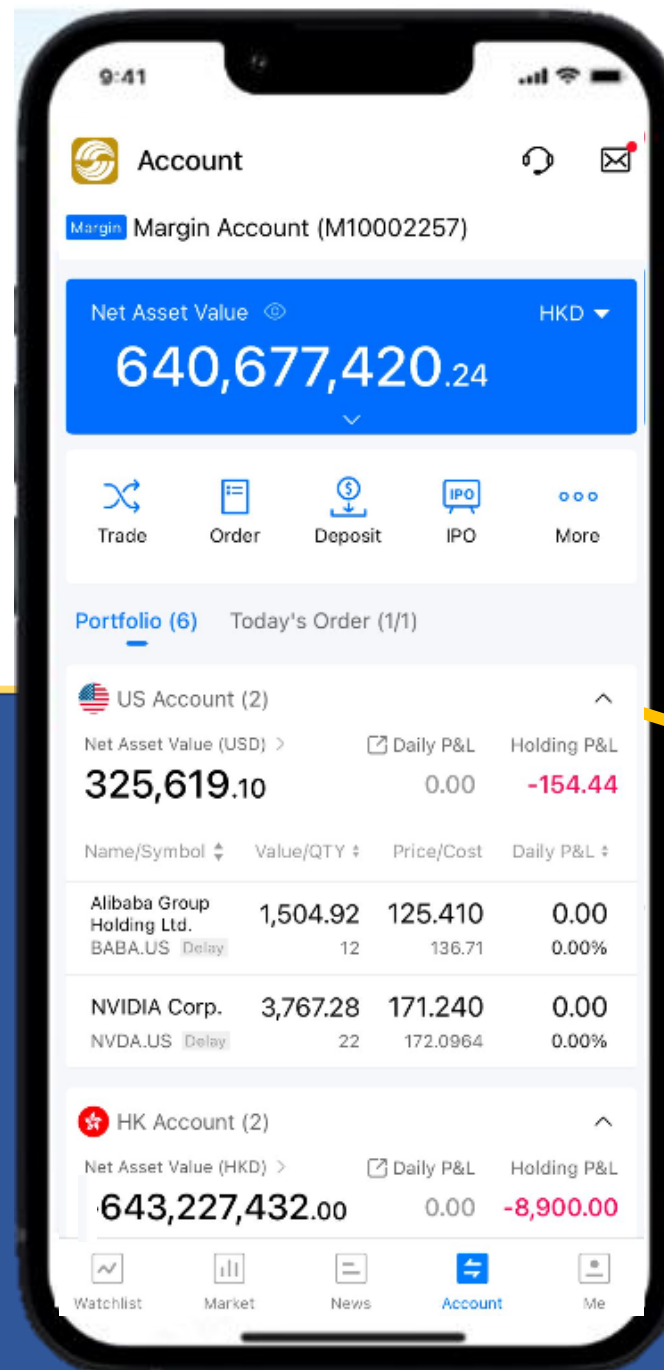


“Account”



Account

View account information, such as net asset value, holdings in Hong Kong stocks, US stocks, and structured products.



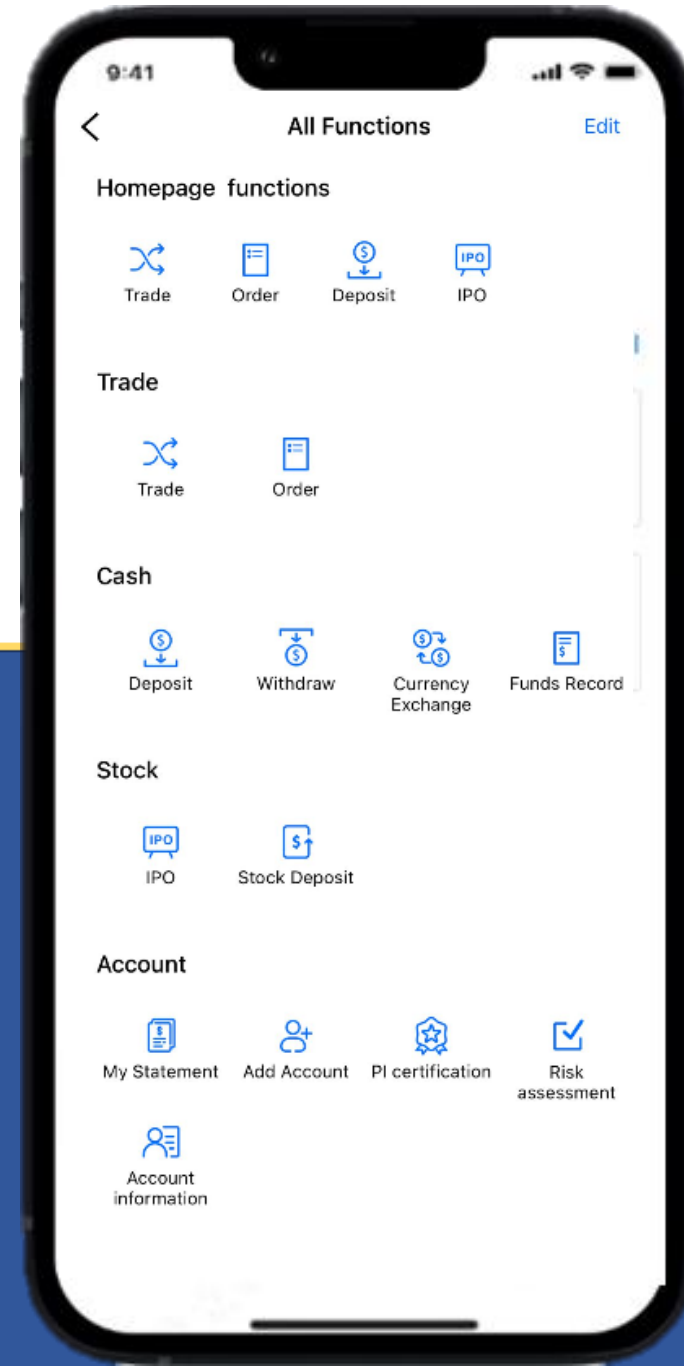
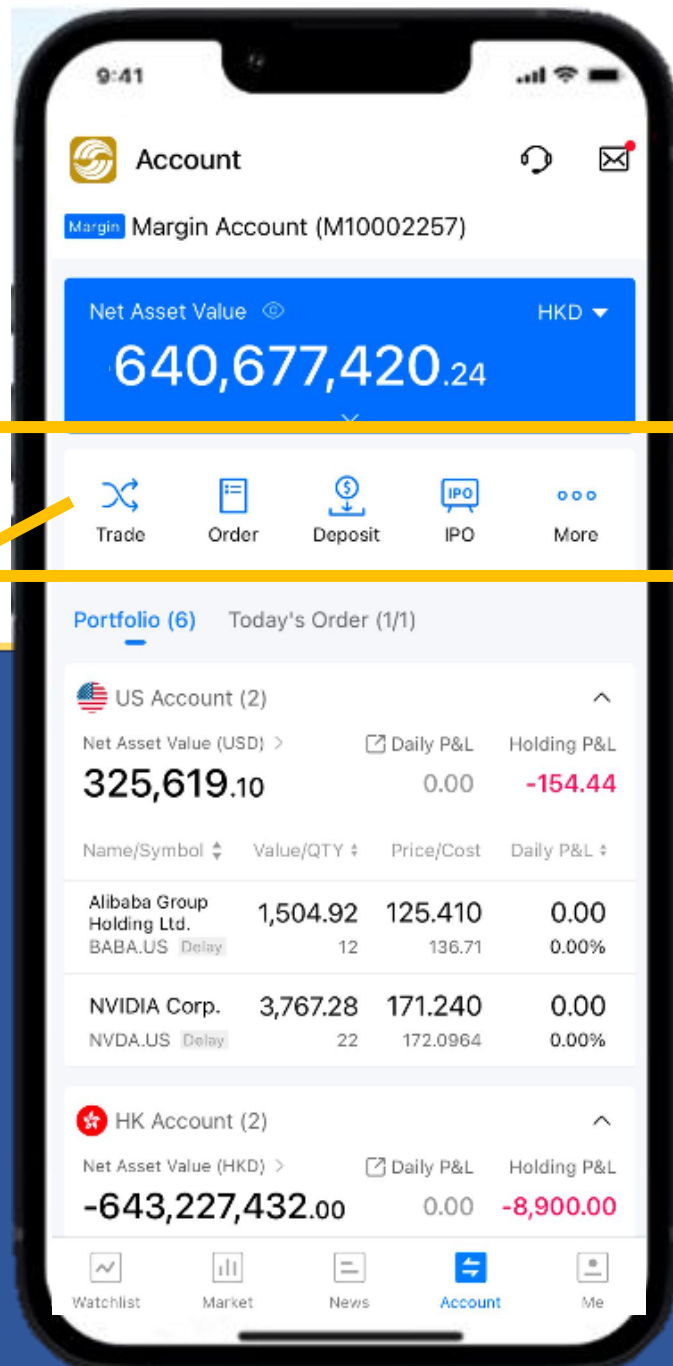
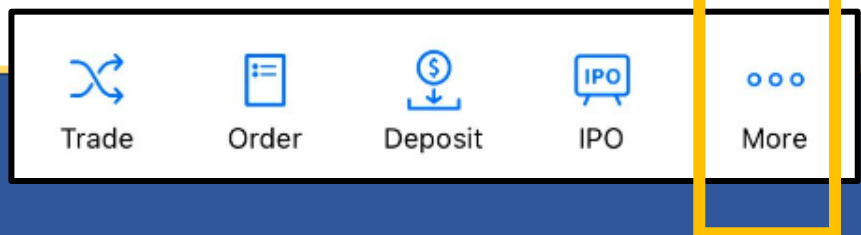
Holdings in Hong Kong stocks, US stocks, and structured products are displayed below.

Portfolio (6) Today's Order (1/1)

US Account (2)			
Net Asset Value (USD) >	Daily P&L		
325,619.10	0.00		
Holding P&L	-154.44		
Name/Symbol	Value/QTY	Price/Cost	Daily P&L
Alibaba Group Holding Ltd. BABA.US <small>Delay</small>	1,504.92 12	125.410 136.71	0.00 0.00%
NVIDIA Corp. NVDA.US <small>Delay</small>	3,767.28 22	171.240 172.0964	0.00 0.00%

HK Account (2)			
Net Asset Value (HKD) >	Daily P&L		
643,227,432.00	0.00		
Holding P&L	-8,900.00		
Name/Symbol	Value/QTY	Price/Cost	Daily P&L
HSBC HOLDINGS 00005.HK <small>Delay</small>	199,680.00 1,600	124.800 132.55	0.00 0.00%

You can also click "More" to view all functions.



“ Me ”

Account & Security:

You can change your password, trading settings, Face ID login, and more.

Settings

Personal Information

Language (語言)

English >

Quote Color

Green Up/Red Down >

Theme Color

Simple White >

Stock Quotes Mode

Standard >

Settings:
You can personalize settings such as language, quote format, and display.

APP Login

Change Login Password

Face ID

After enabling, you can use Face ID to quickly complete login by verifying your Face. The setting only applies to this device.

Securities trading account

Change Transaction Password >

Change Account Password >

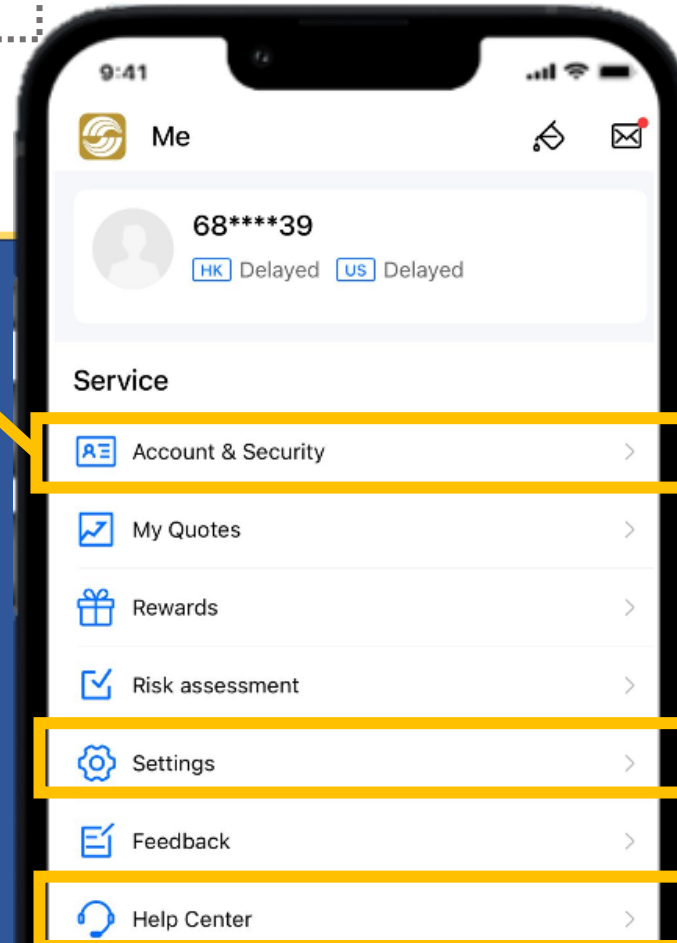
Trade unlock settings

Trade page unlock, 5 Mins >

Trade Settings >

Face ID

Face ID is only valid for this device, used for buying and selling on the transaction order page.



Help Center

Help Center

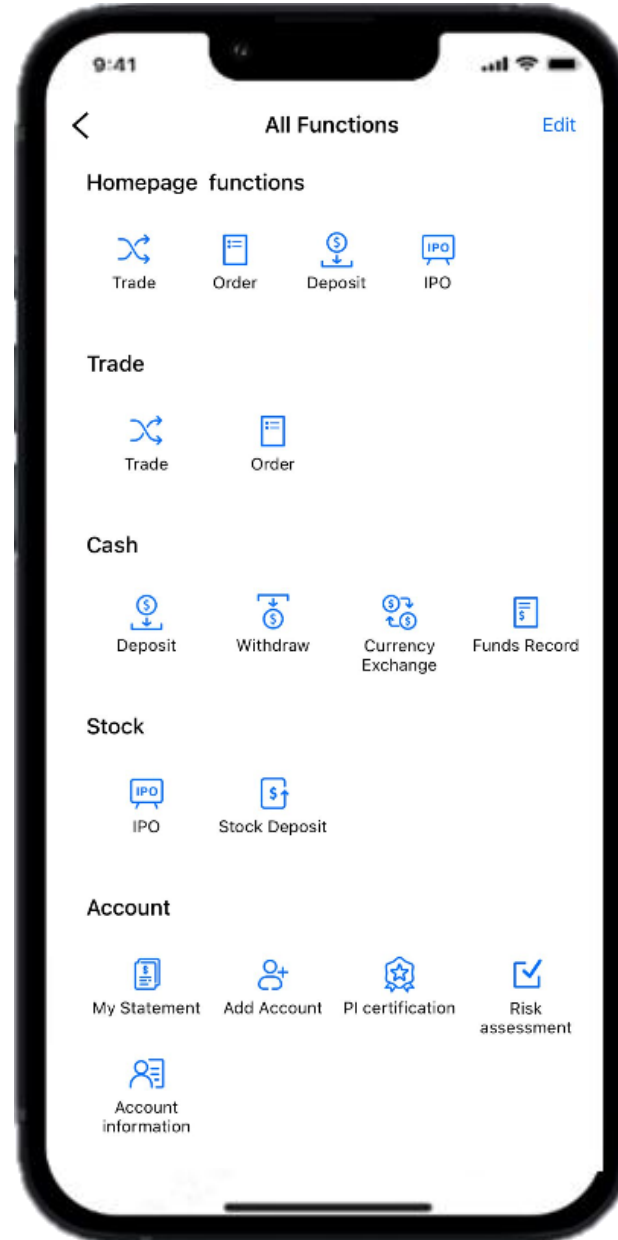
Search your question

Contact Us

App Feedback

Help Center:
Contact Us, App Feedback

- Trading
- Deposit
- Withdraw
- Currency Exchange
- Fund Record
- My Statement



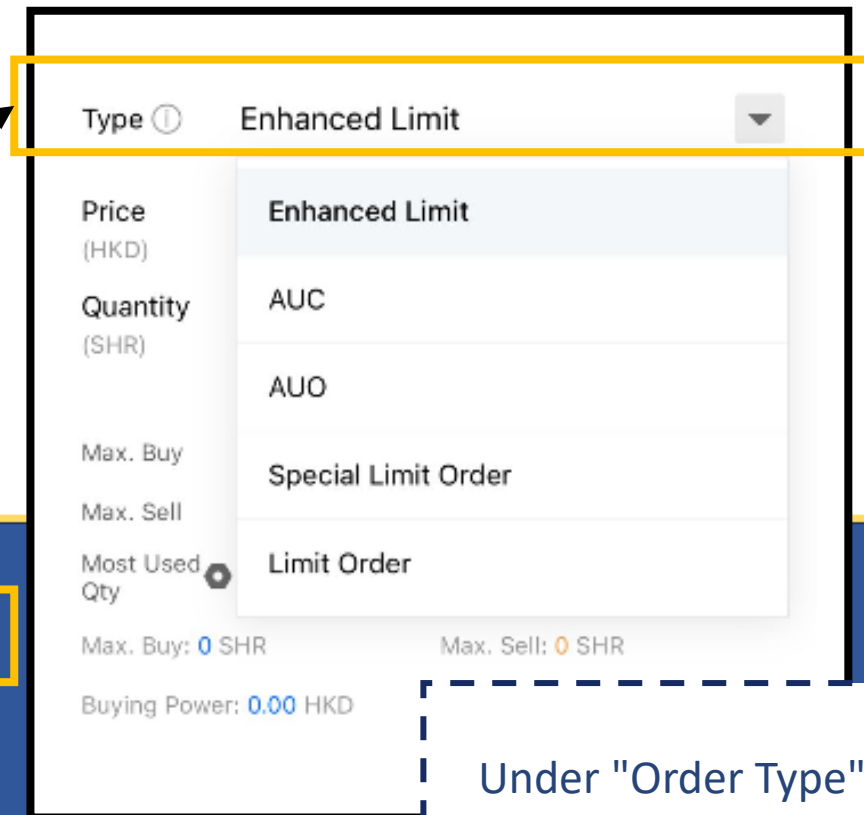
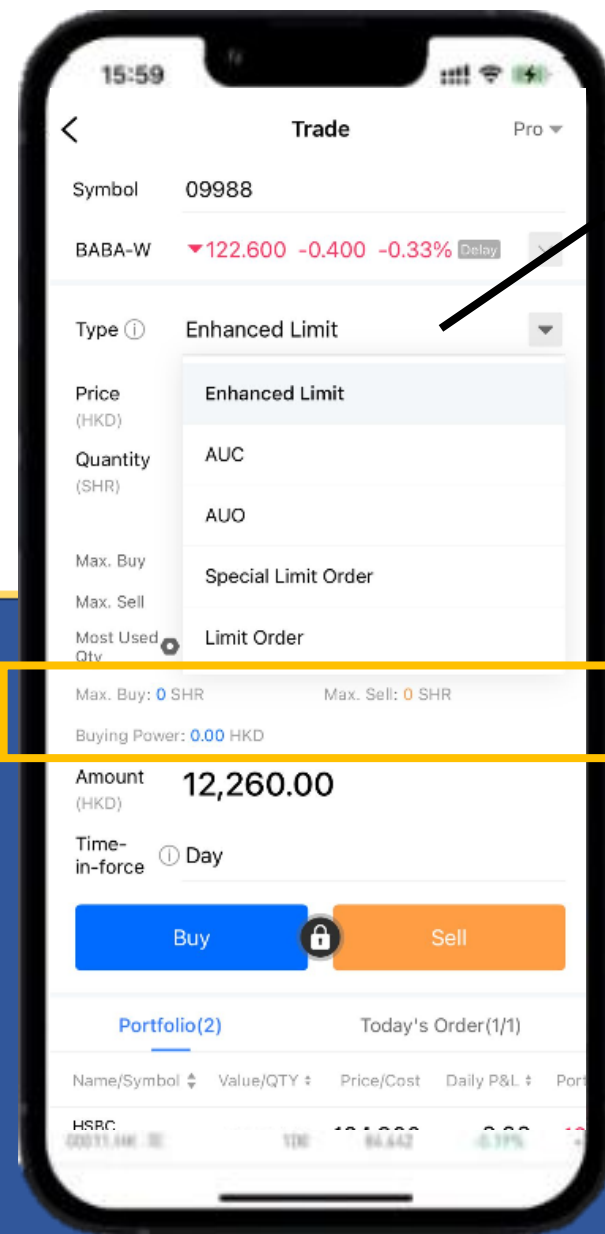
Trading



Trade

After entering the stock name, code, quantity, and price, you can submit the order.

It also shows the “Max. Buy” quantity and “Max. Sell” quantity.



Under "Order Type", you can select different order types, such as "Enhanced Limit", "AUC", etc.

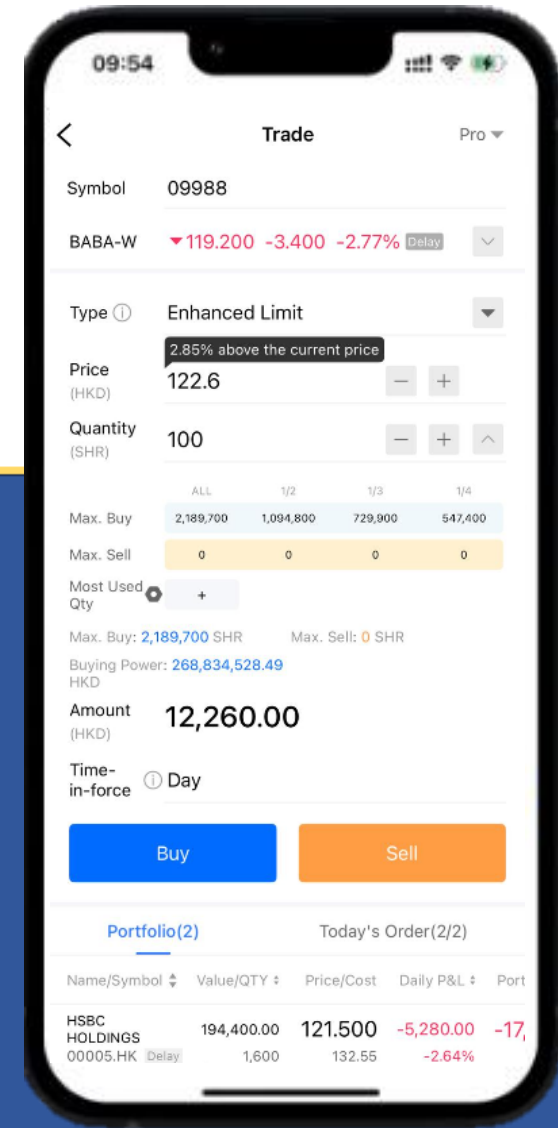
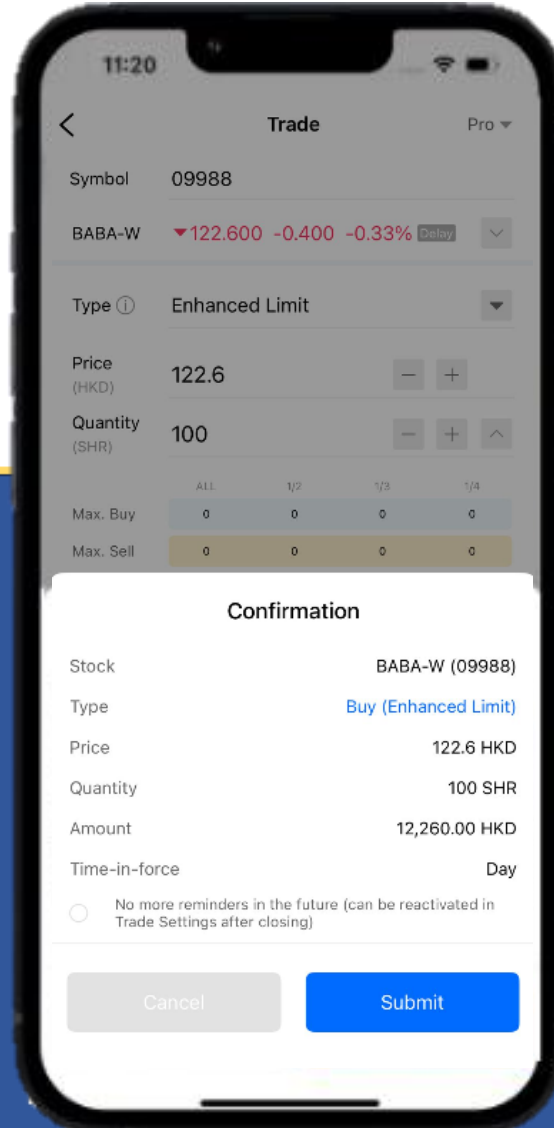
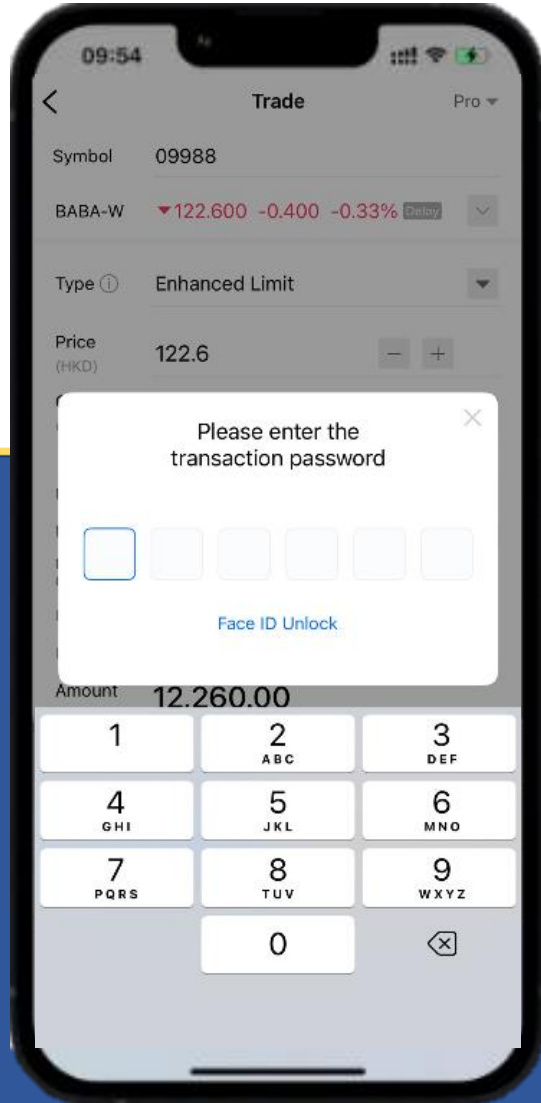
Enter trading password



Confirm order

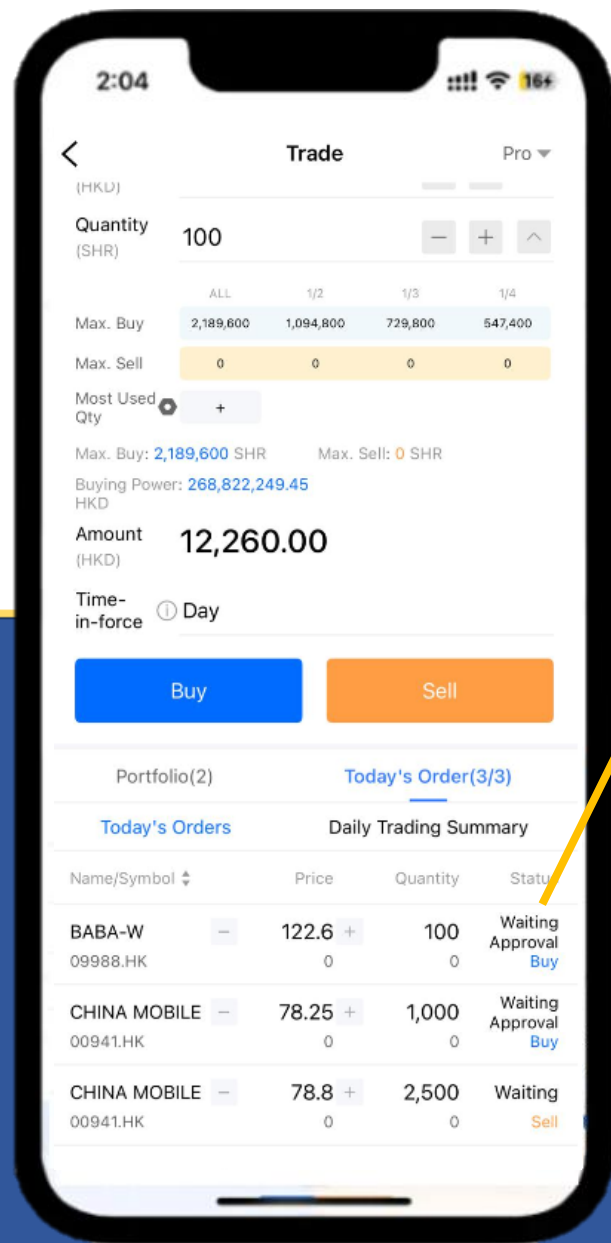


Submit order





After the order is submitted, you can view it under "Today's Orders" and modify or cancel the order.



Portfolio(2)		Today's Order(3/3)		
Today's Orders		Daily Trading Summary		
Name/Symbol	Price	Quantity	Status	
BABA-W 09988.HK	122.6 0	100 0	Waiting Approval Buy	
CHINA MOBILE 00941.HK	78.25 0	1,000 0	Waiting Approval Buy	
CHINA MOBILE 00941.HK	78.8 0	2,500 0	Waiting Sell	

Click on the order entry, and different options such as "Modify Order" or "Cancel" will appear.

Deposit Funds



Click “**Deposit**” and submit the instruction for fund deposit into our designated bank account.

Bank Name

HANG SENG BANK LTD



Bank address

83 Des Voeux Road Central, Hong Kong



Bank/Branch Code

024



SWIFT/BICCode

HASEHKHH



Account Name

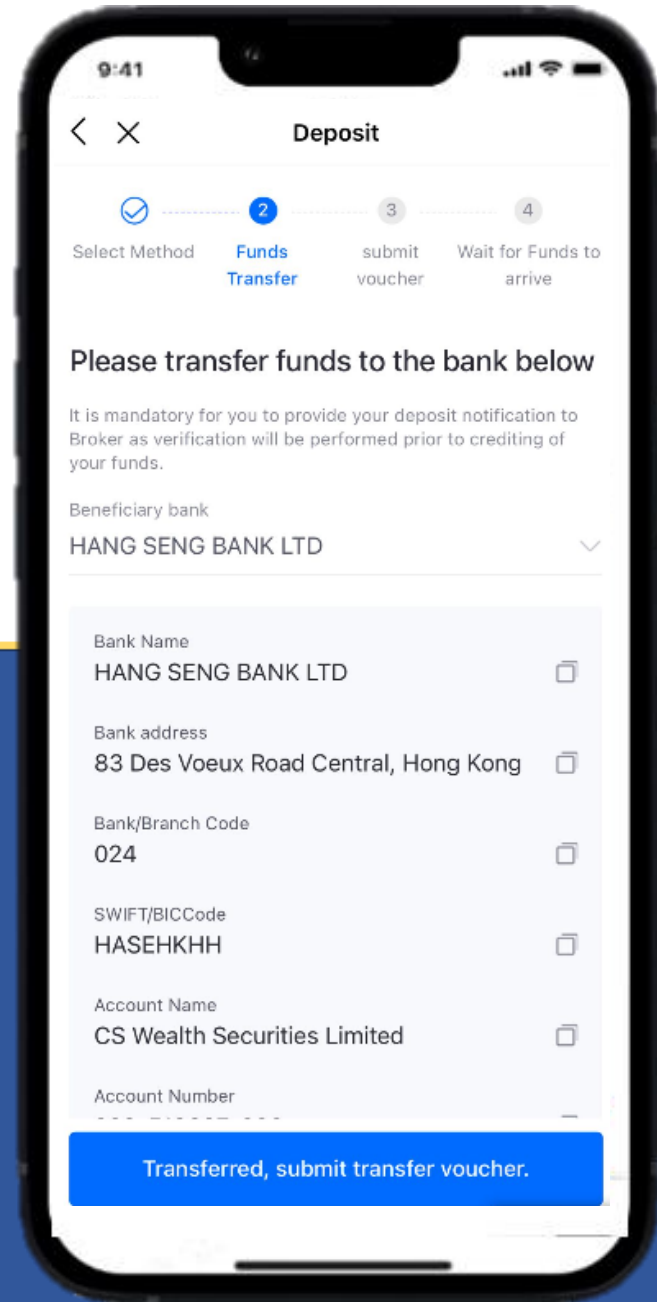
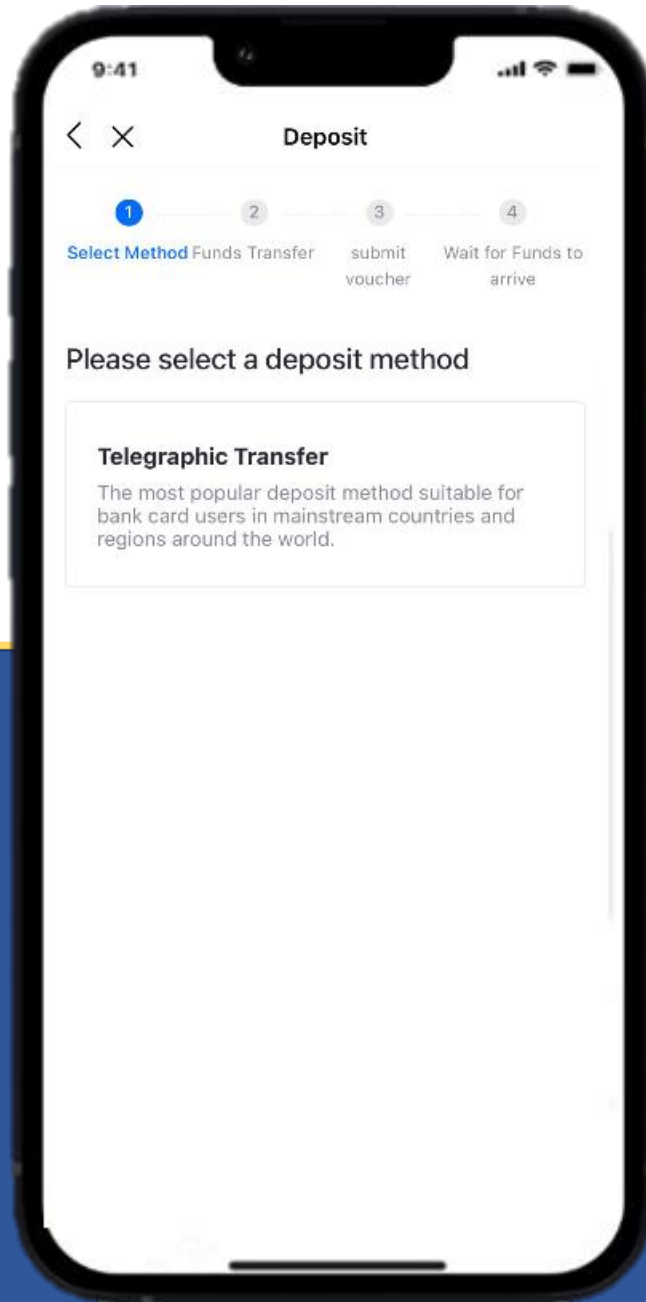
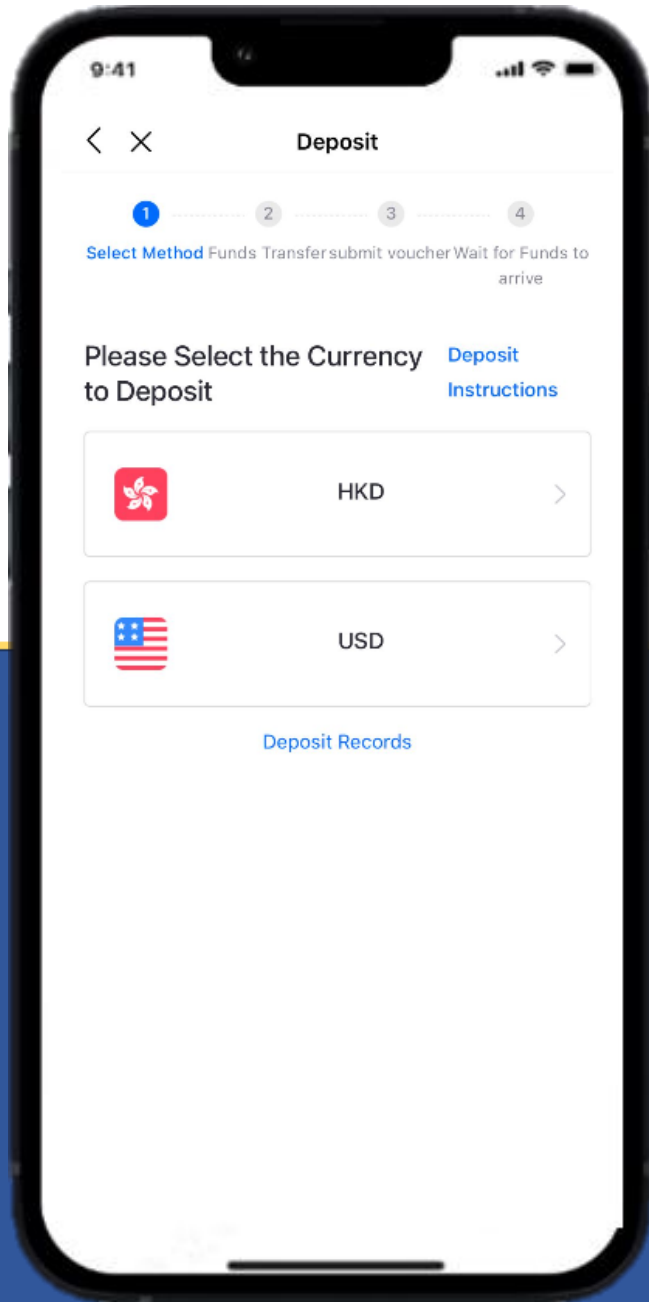
CS Wealth Securities Limited



Account Number

239-519697-883

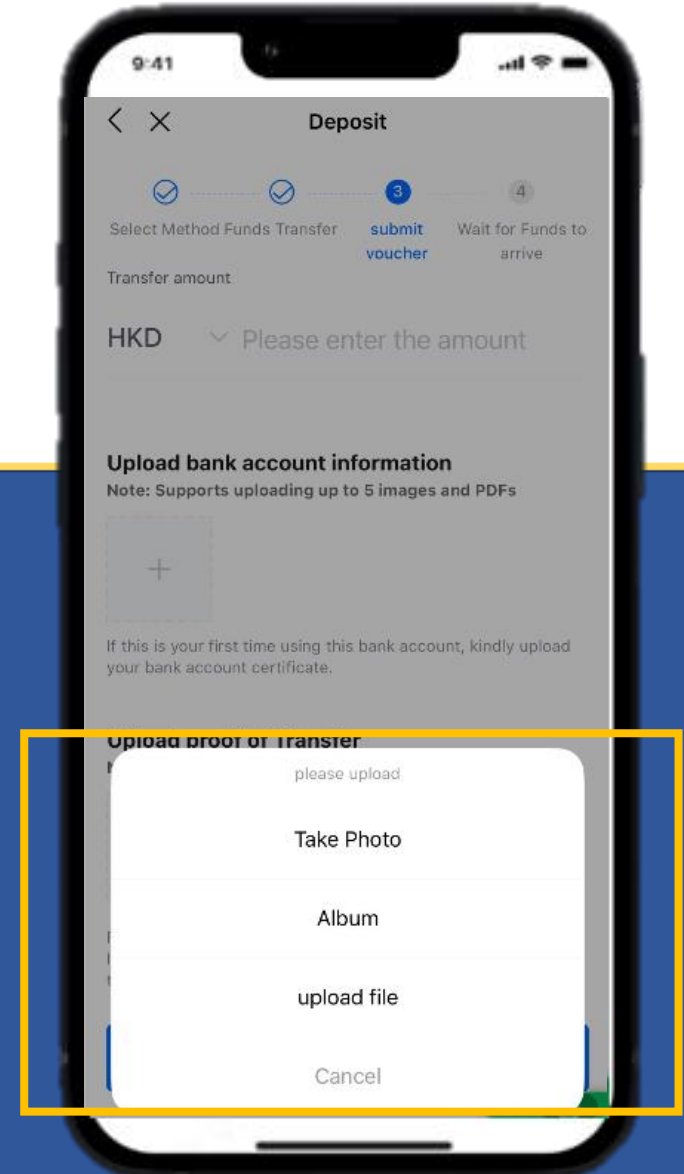
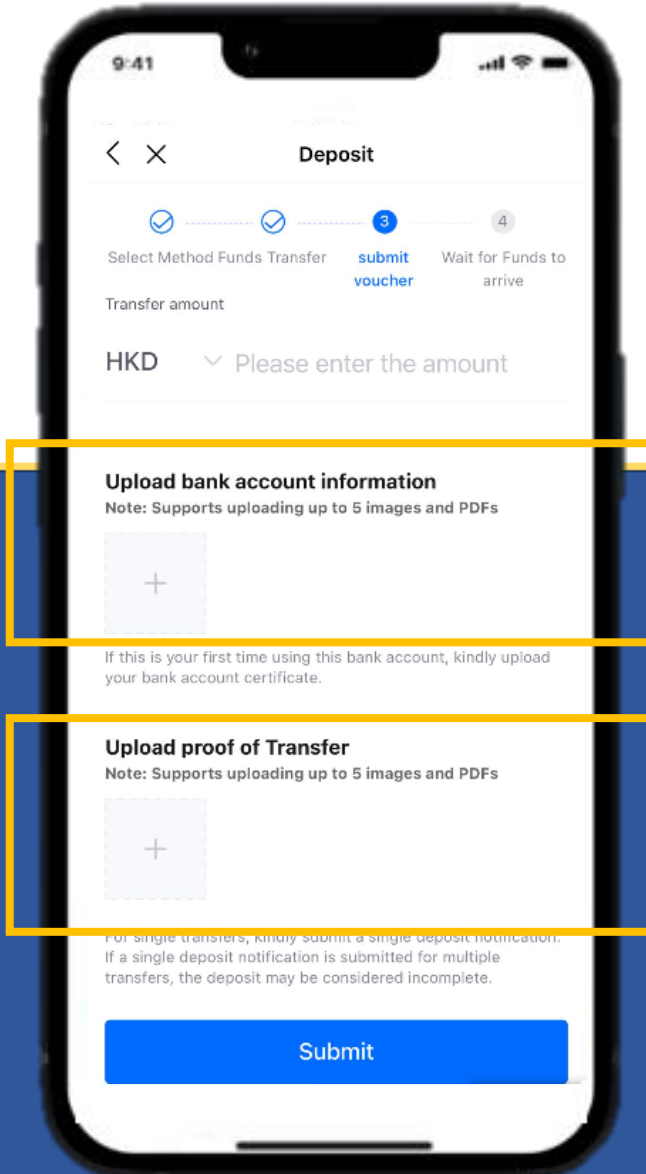
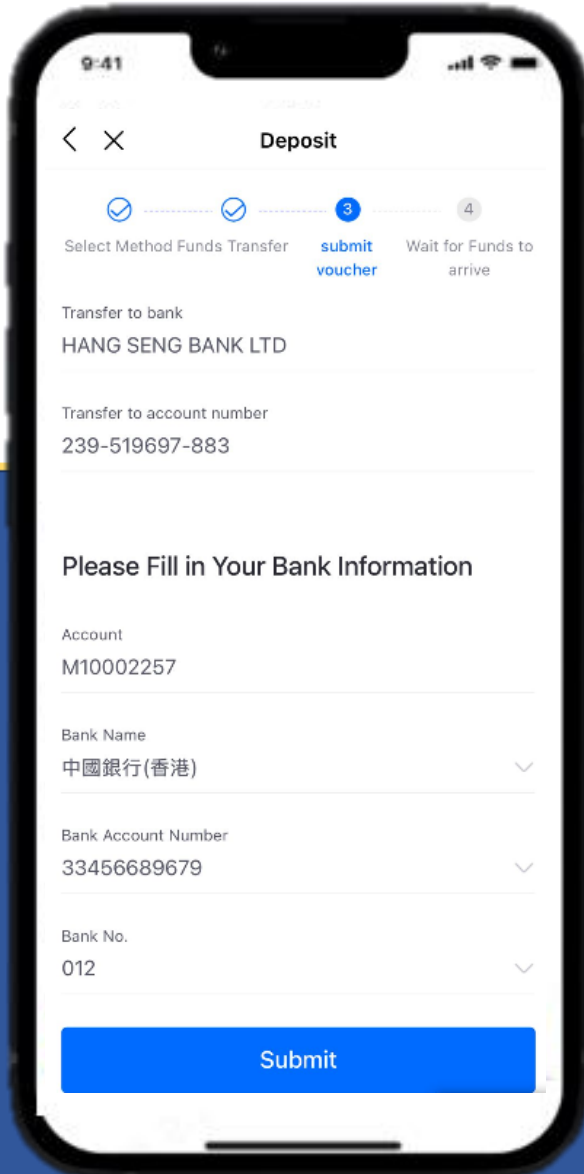




Enter the transfer amount.

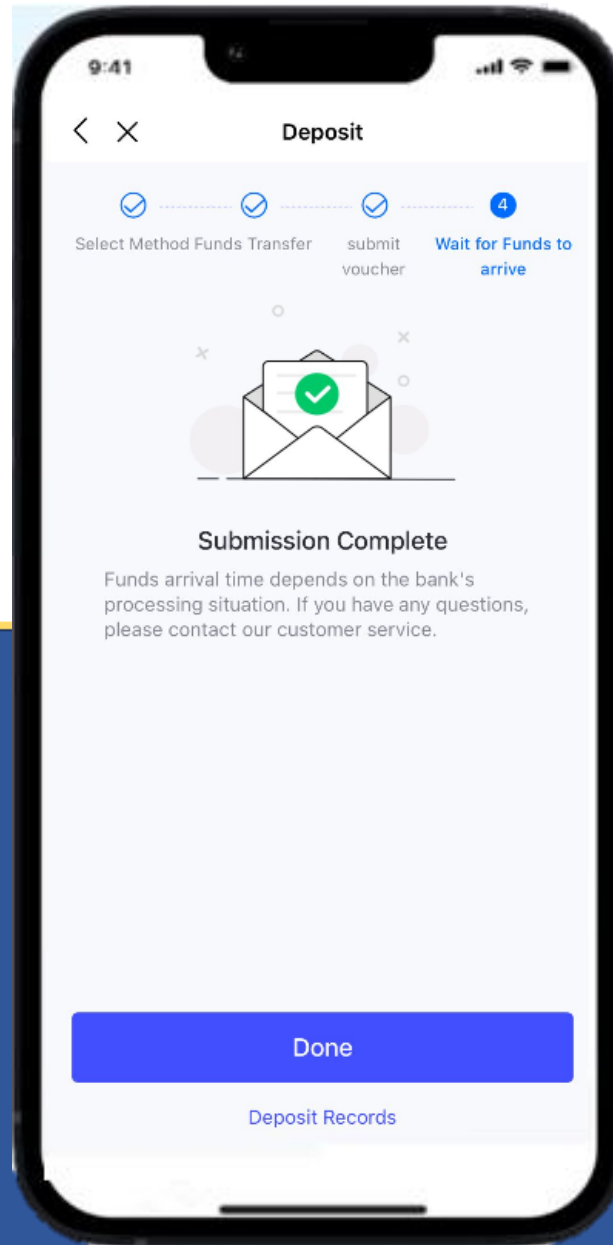


Upload the transfer proof & bank A/C proof (first-time users must upload both bank A/C proof and transfer proof).




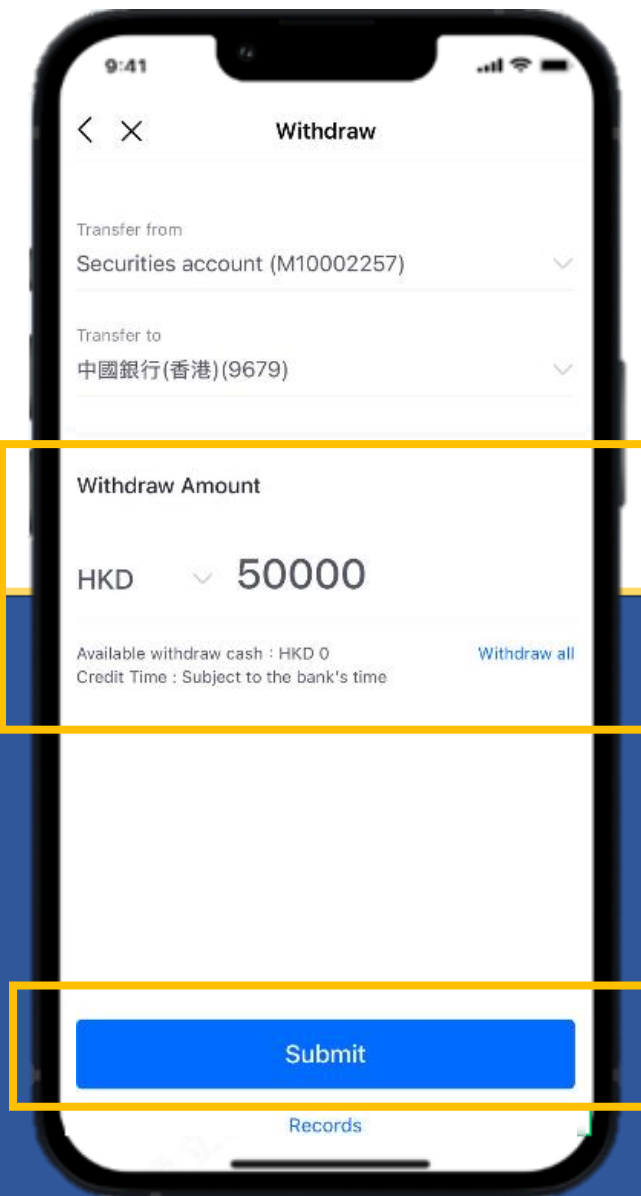


Transfer instruction
has been submitted.



Withdraw Funds

Click “ Withdraw”, enter the withdrawal amount, and submit the application.



Withdraw

Transfer from
Securities account (M10002257)

Transfer to
中國銀行(香港)(9679)

Withdraw Amount

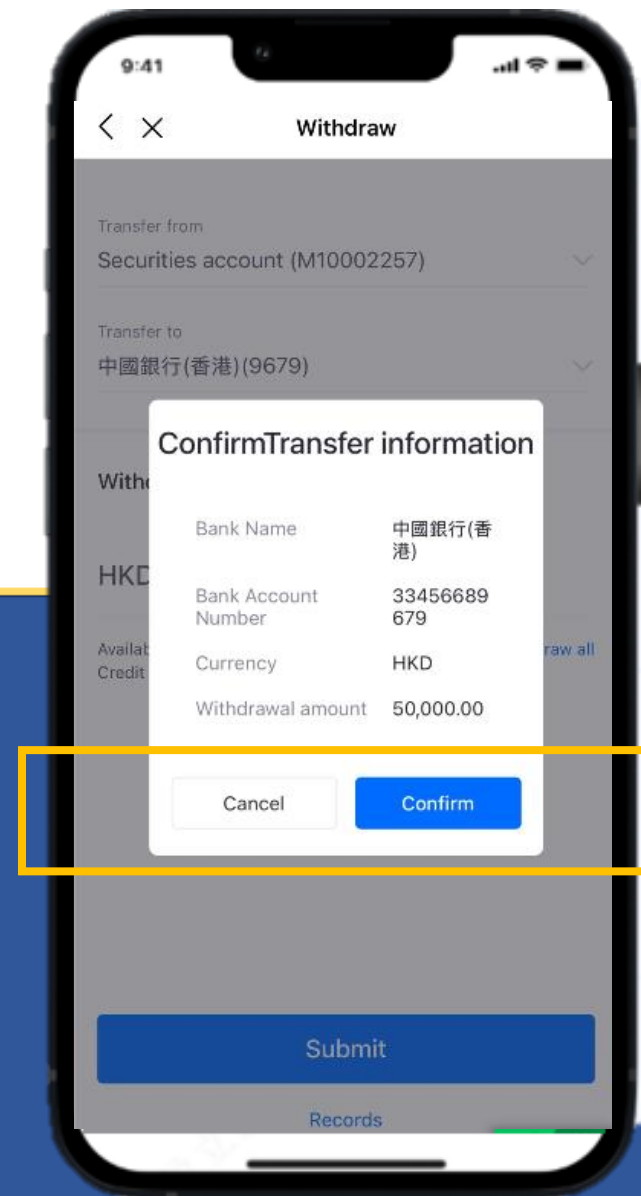
HKD 50000

Available withdraw cash : HKD 0
Credit Time : Subject to the bank's time

Withdraw all

Submit

Records



Withdraw

Transfer from
Securities account (M10002257)

Transfer to
中國銀行(香港)(9679)

Withdrawal amount

ConfirmTransfer information

Bank Name	中國銀行(香港)
Bank Account Number	33456689 679
Currency	HKD
Withdrawal amount	50,000.00

Cancel Confirm

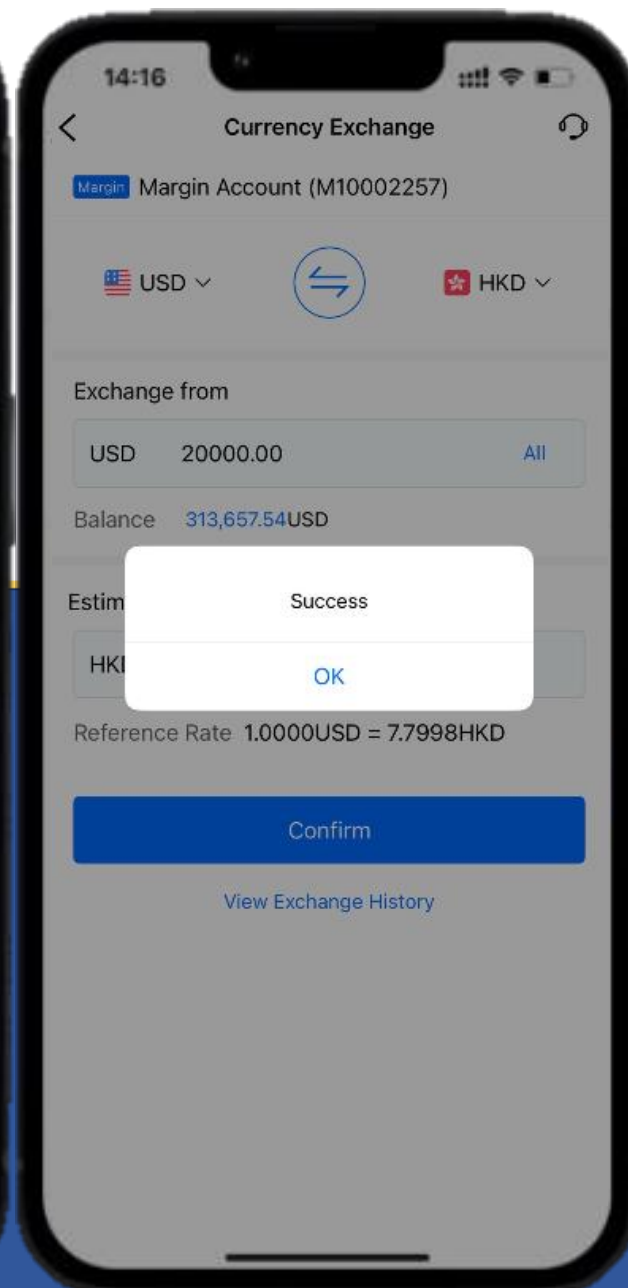
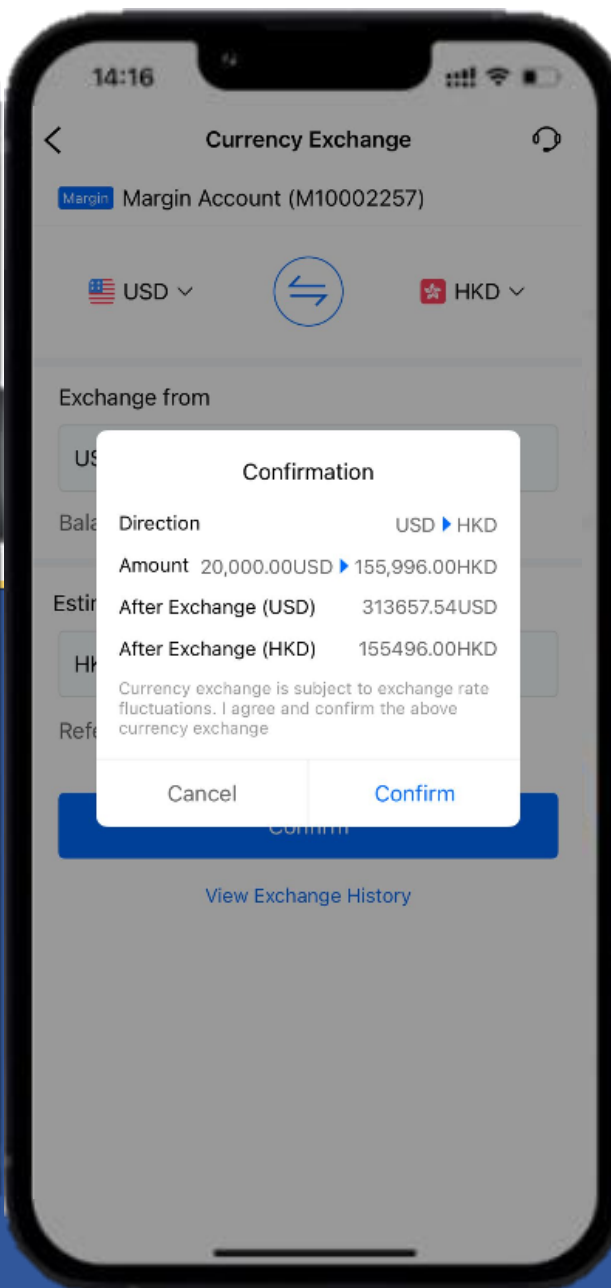
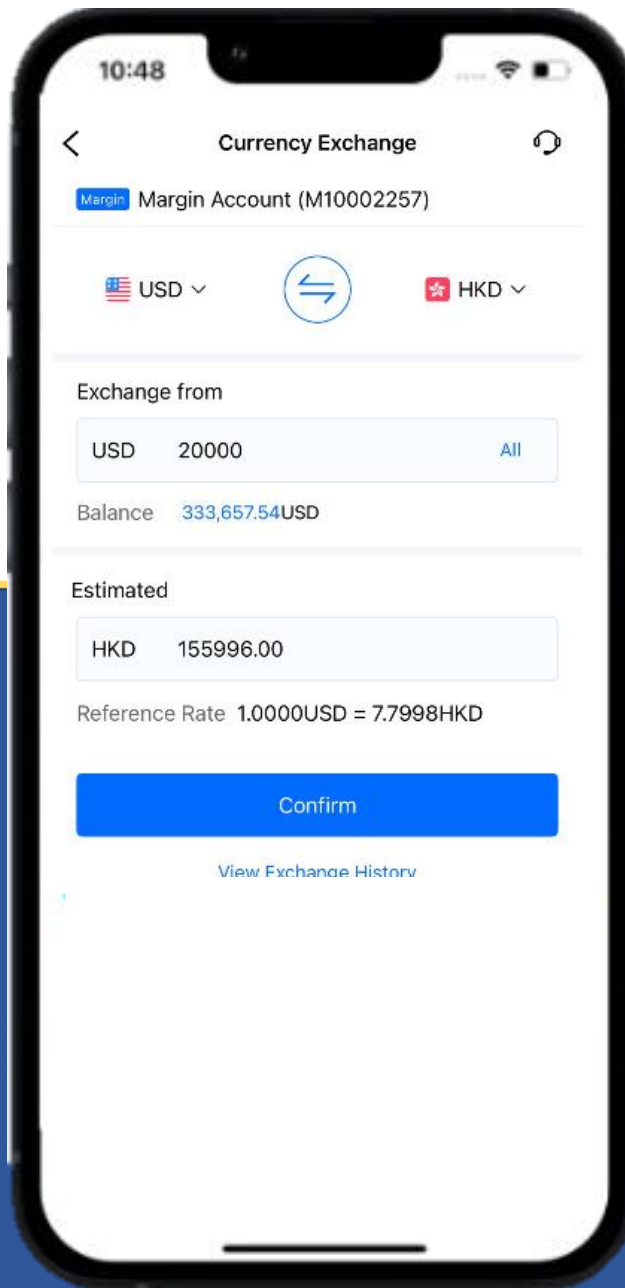
Submit

Records

Currency Exchange



Click “**Currency Exchange**” to select USD to HKD or HKD to USD exchange.



Funds Record



Funds Record

View all fund deposit, withdrawal, and exchange records.

9:41

Cash Flow

HKD ▾ All Dates ▾

2026-03

Deposit	+155,996.00
FUND TRANSFER FM USD @7.799800	
2026-03-27 17:15:39	
Withdraw	-500.00
FUND TRANSFER TO USD @7.857000	
2026-03-17 13:38:40	
Withdraw	-2,621,047.38
FUND TRANSFER TO USD @7.857000	
2026-03-17 10:37:50	

2026-01

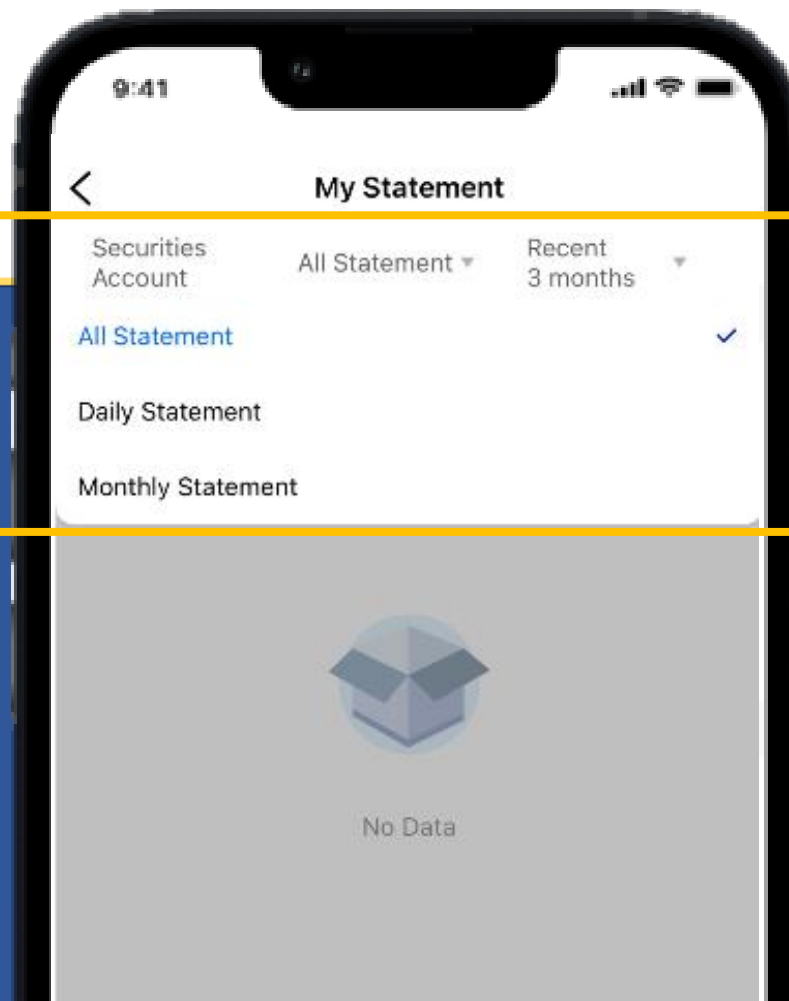
Deposit	+743,063.19
FUND TRANSFER FM USD @7.773300	
2026-01-27 13:39:53	
Deposit	+6,217.92
FUND TRANSFER FM USD @7.772400	
2026-01-26 14:39:14	
Deposit	+500,000.00
DEPOSIT FM 中国银行 (香港) ,33456689679	
2026-01-26 14:33:18	

My Statement



View daily statements and monthly statements.


My Statement

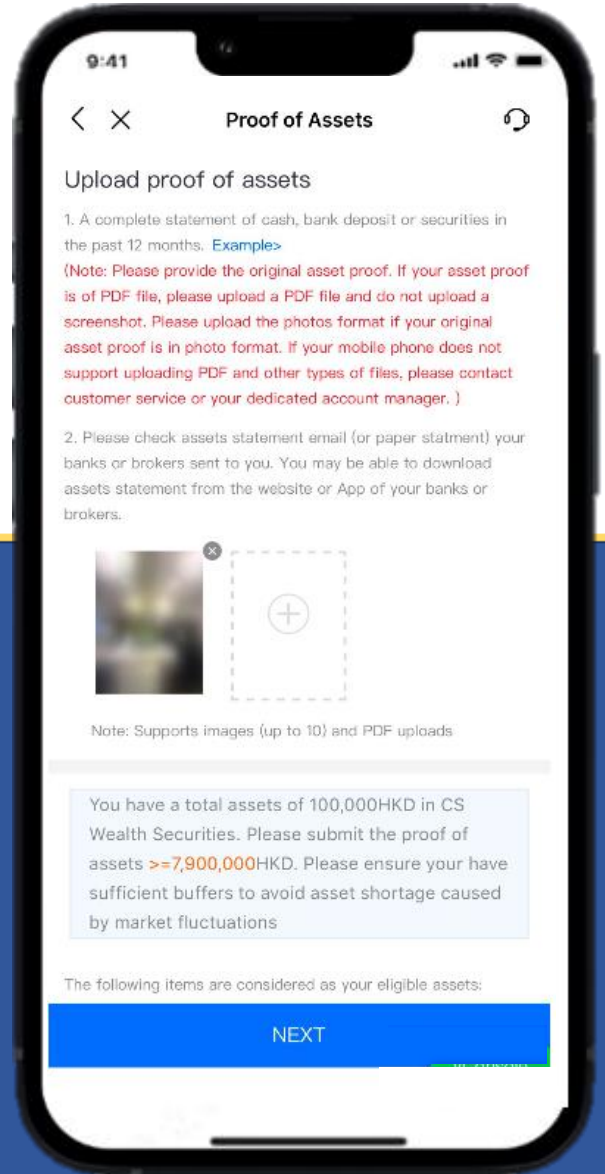
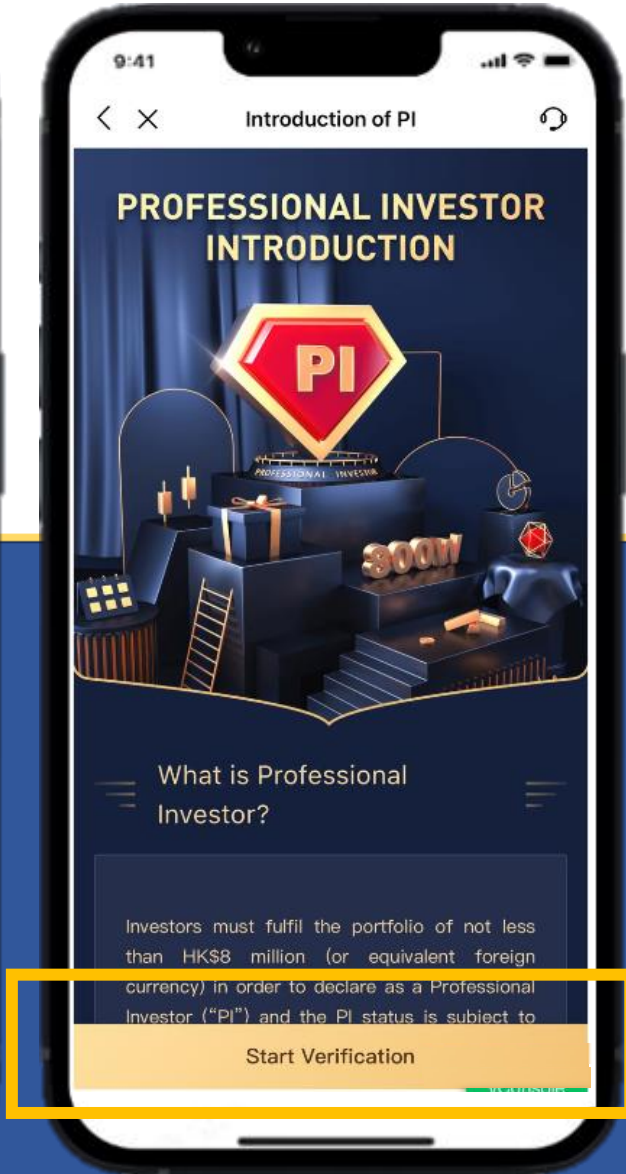
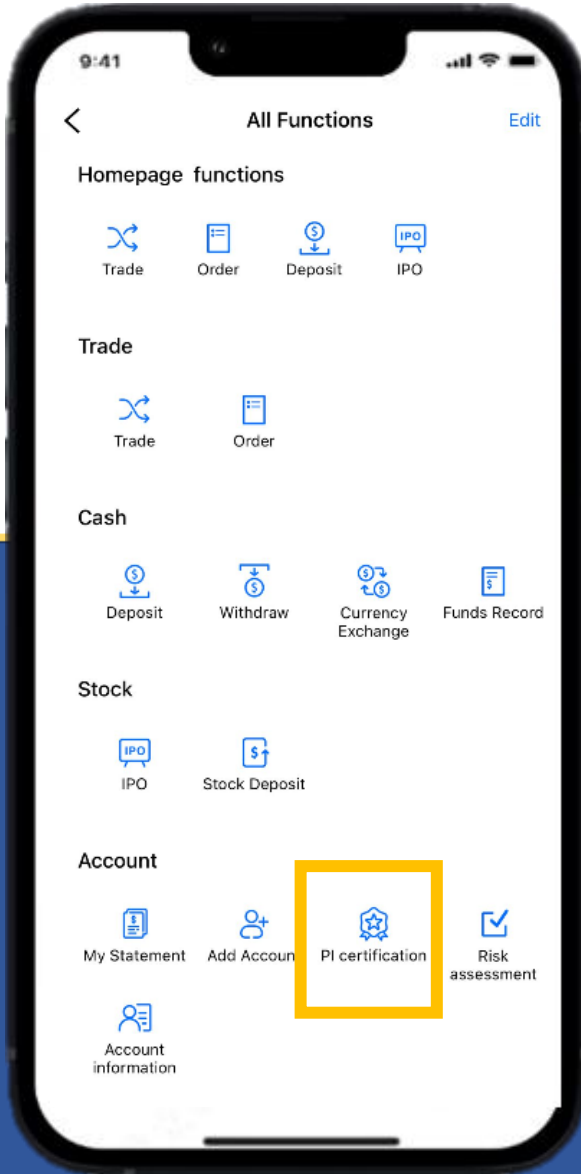


Professional Investor Certification

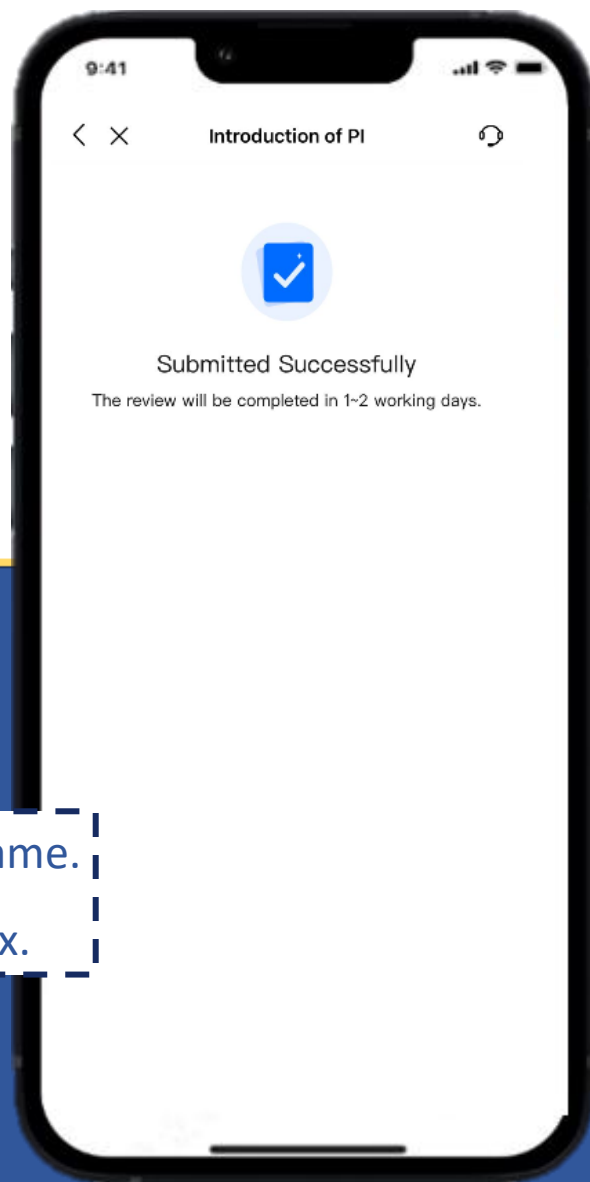
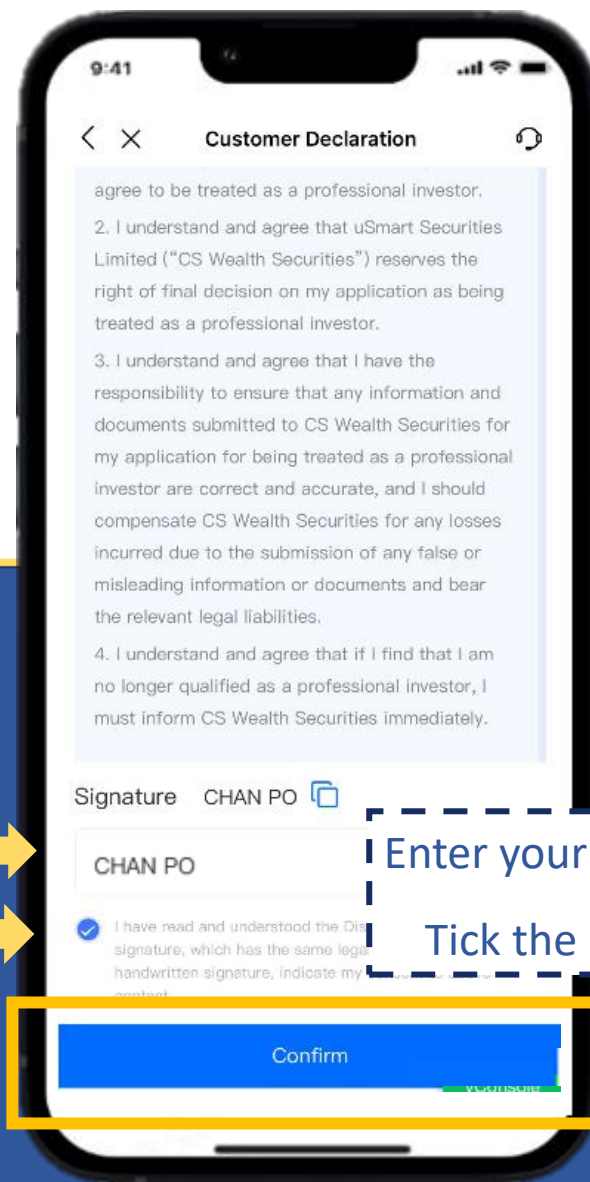
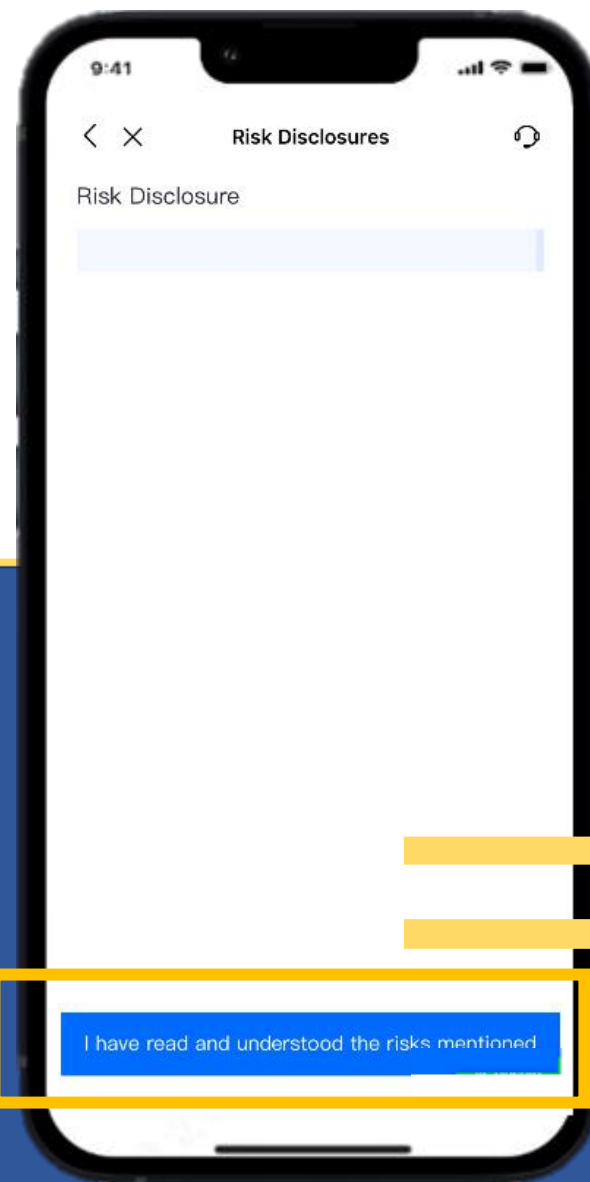
Individual investors with assets of \geq HKD 8 million (or equivalent currency) may be certified as professional investors upon approval.



Click “”, then follow the instructions to upload the relevant asset proof.




After reading the "Risk Disclosure", enter your name as signature to confirm, then you can submit the application.

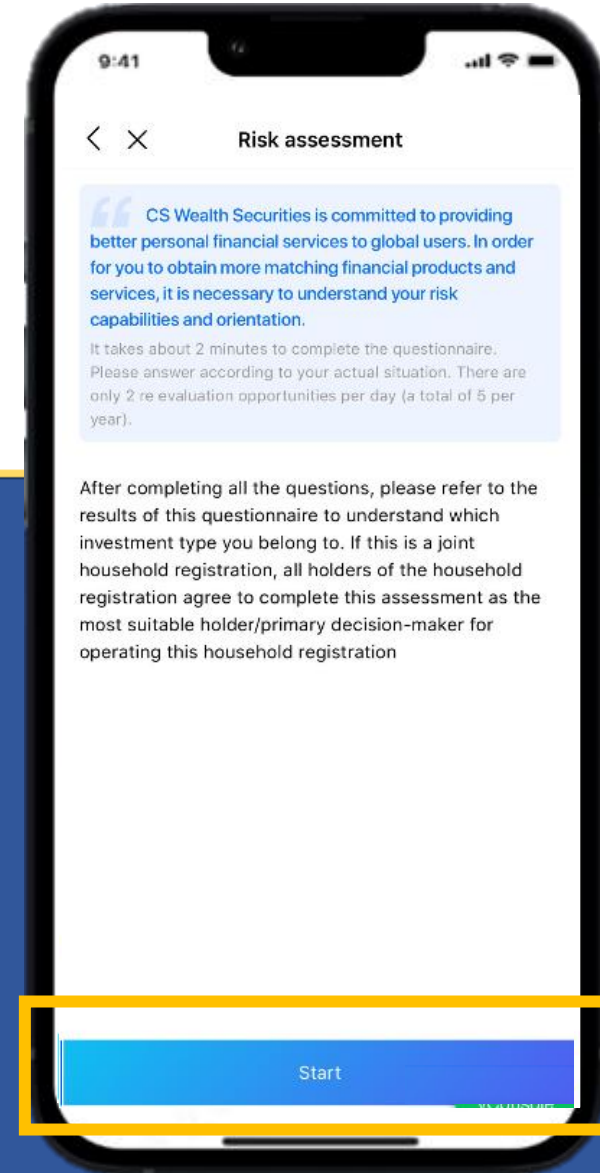
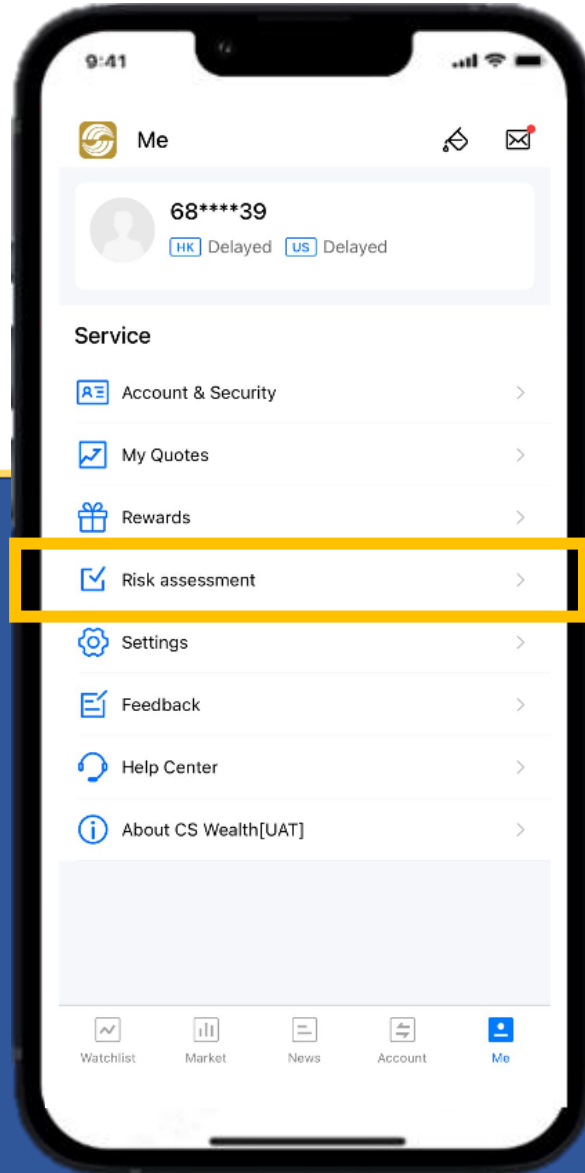


Enter your name.
Tick the box.

05

Structured Product Account Opening

Click “  Risk assessment ”
to proceed to the risk
assessment.



After completing the risk assessment questionnaire, the system will automatically calculate your score and analyze your risk tolerance.

9:41 Risk assessment

You have completed question 0/11

1. Which age range do you fall into?

- a. 18-35
- b. 36-50
- c. 51-65
- d. >65

2. What is your education level?

- a. Primary level or below
- b. Secondary level
- c. Tertiary / University level
- d. Master level or above

3. How many years of investment experience do you have with investment products the value of which can fluctuate (including "buy and hold" and active trading)? Investment products may include stocks, unit trusts, foreign currencies, bullion, structured investment products, warrants, options, futures, investment-linked insurance plans.)

- a. No experience
- b. 1 to 3 years

Submit

9:41 Risk assessment

You have completed question 11/11

react to this?

- a. Do not know how to react
- b. Cut loss without any sound consideration
- c. Would wait to see if investment improves and may cut loss rationally
- d. Understand market fluctuations are unavoidable and will not alter the investments strategy

11. It is difficult to determine the value of which can fluctuate? Please refer to Question 3 for examples of such products.

- a. Less than 2 year
- b. Between 2 and 5 years
- c. Between 6 and 10 years
- d. Over 10 years

Submit

System estimated risk assessment results

Aggressive

Cancel Submit

9:41 Risk assessment

✔ Evaluation results


Your selection result is:

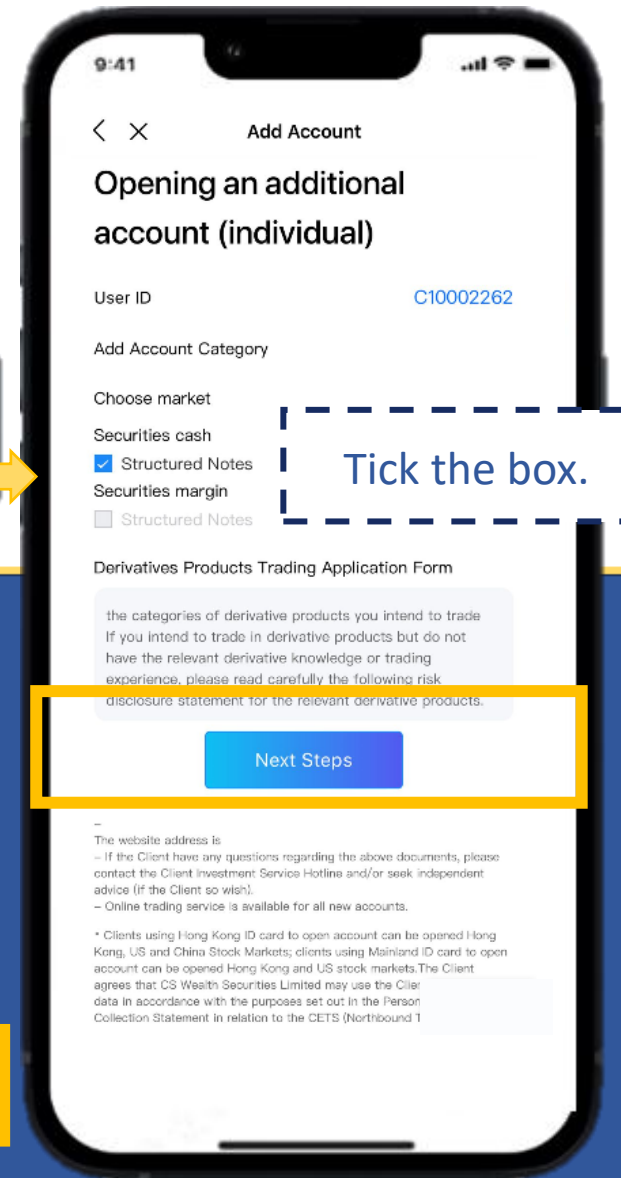
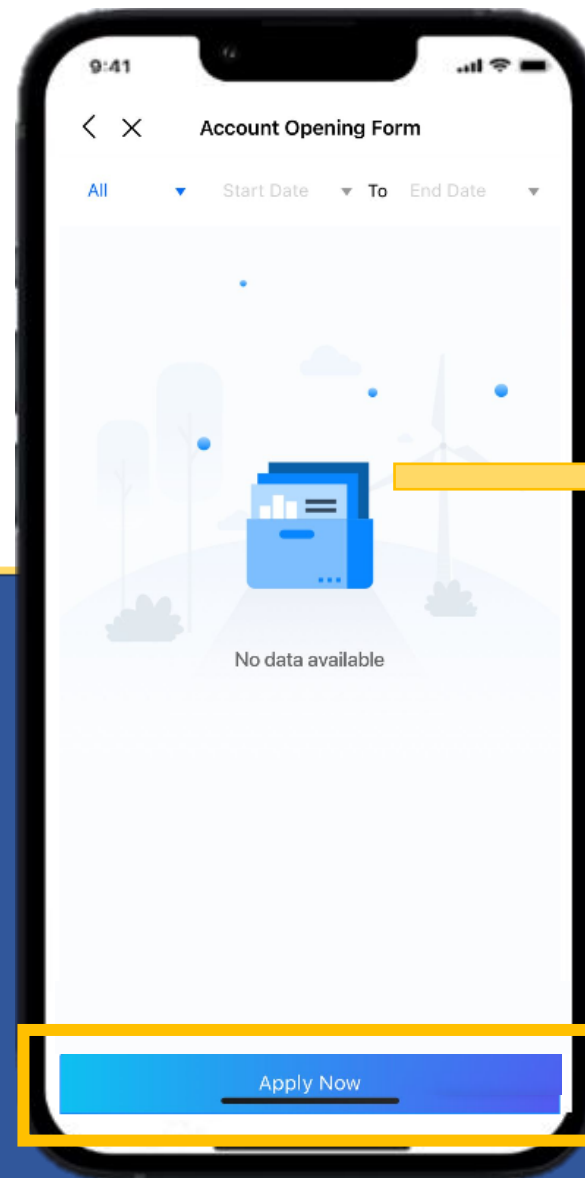
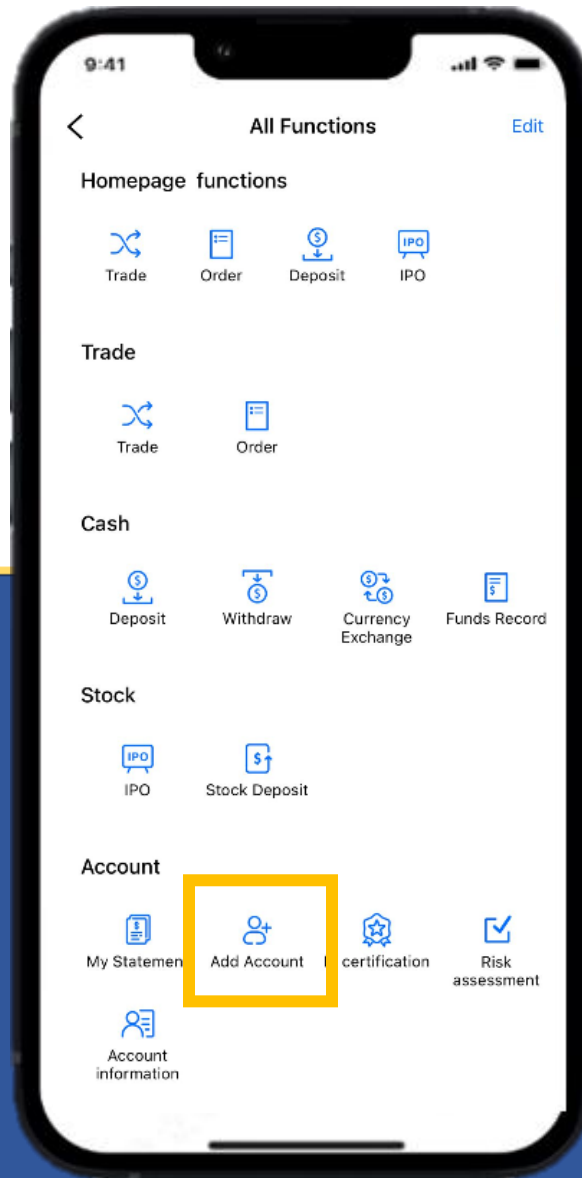
Aggressive

Based on your responses to the profiling questions, it appears that you can follow investment strategies with a risk of substantial negative price movements and that have a significant risk of losing their entire value. This investor rating is compatible with investments or investment strategies which aim to provide very aggressive capital appreciation.

Last risk assessment date: 2026-03-27

Re evaluation

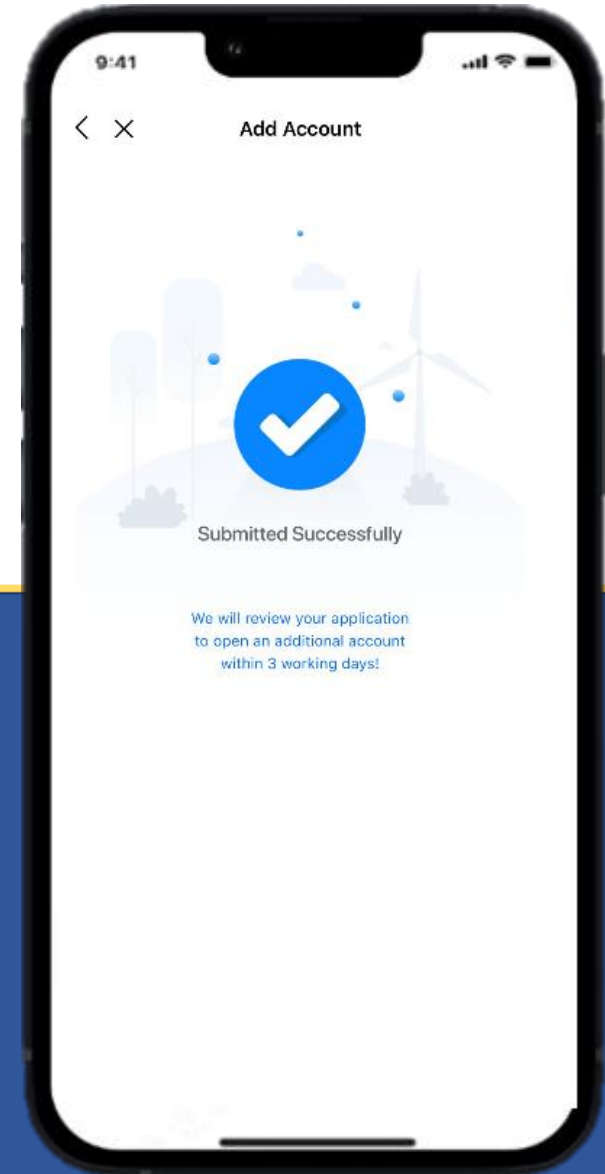
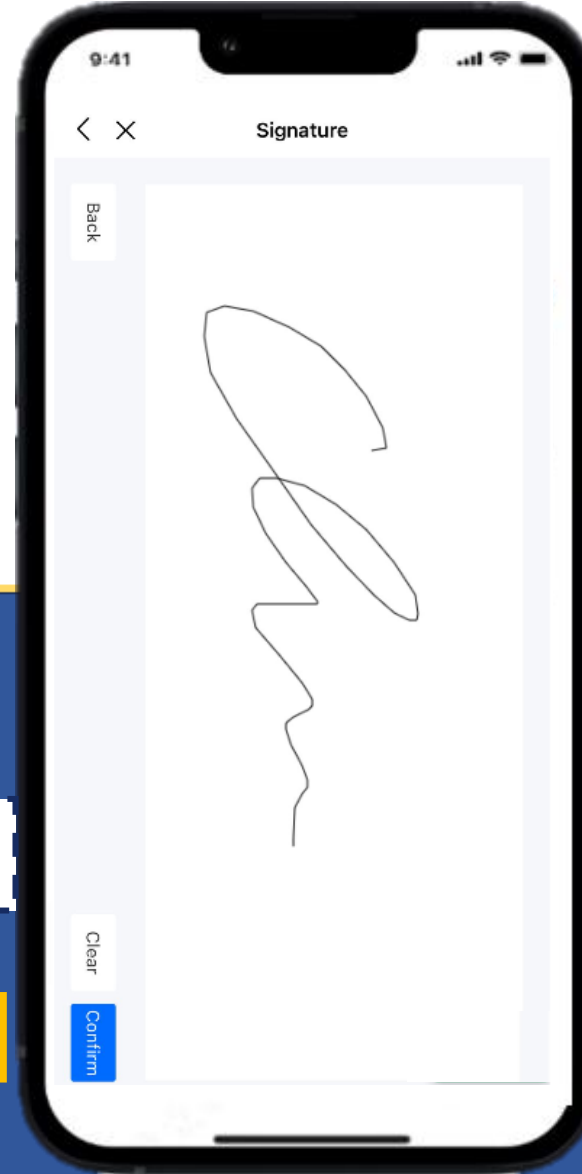
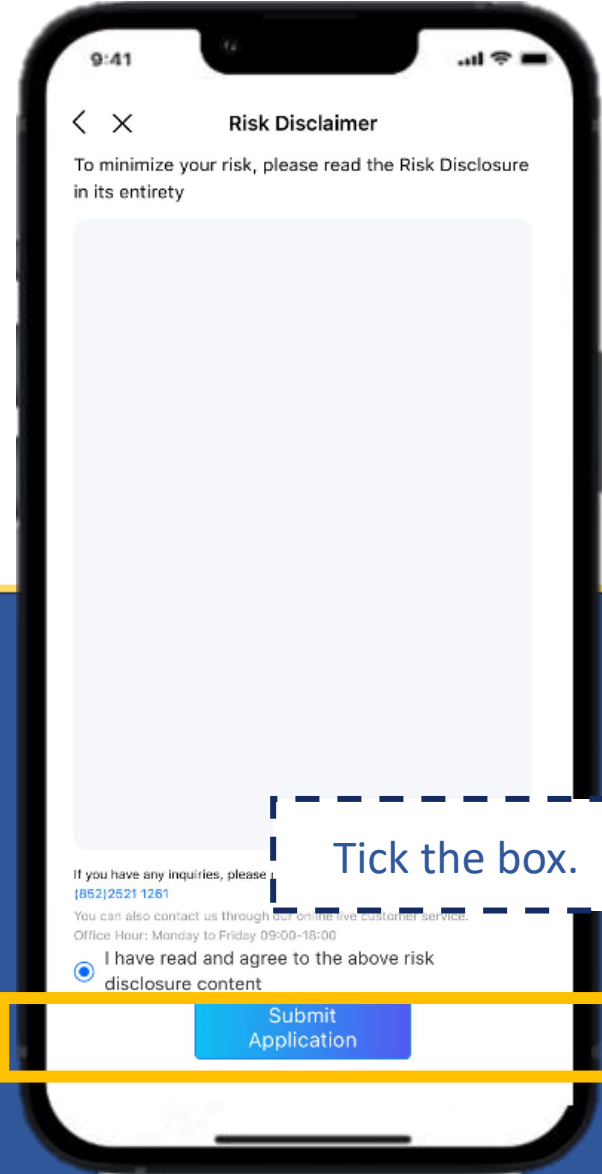
Click “  ” to apply for an additional account.



Tick the box.

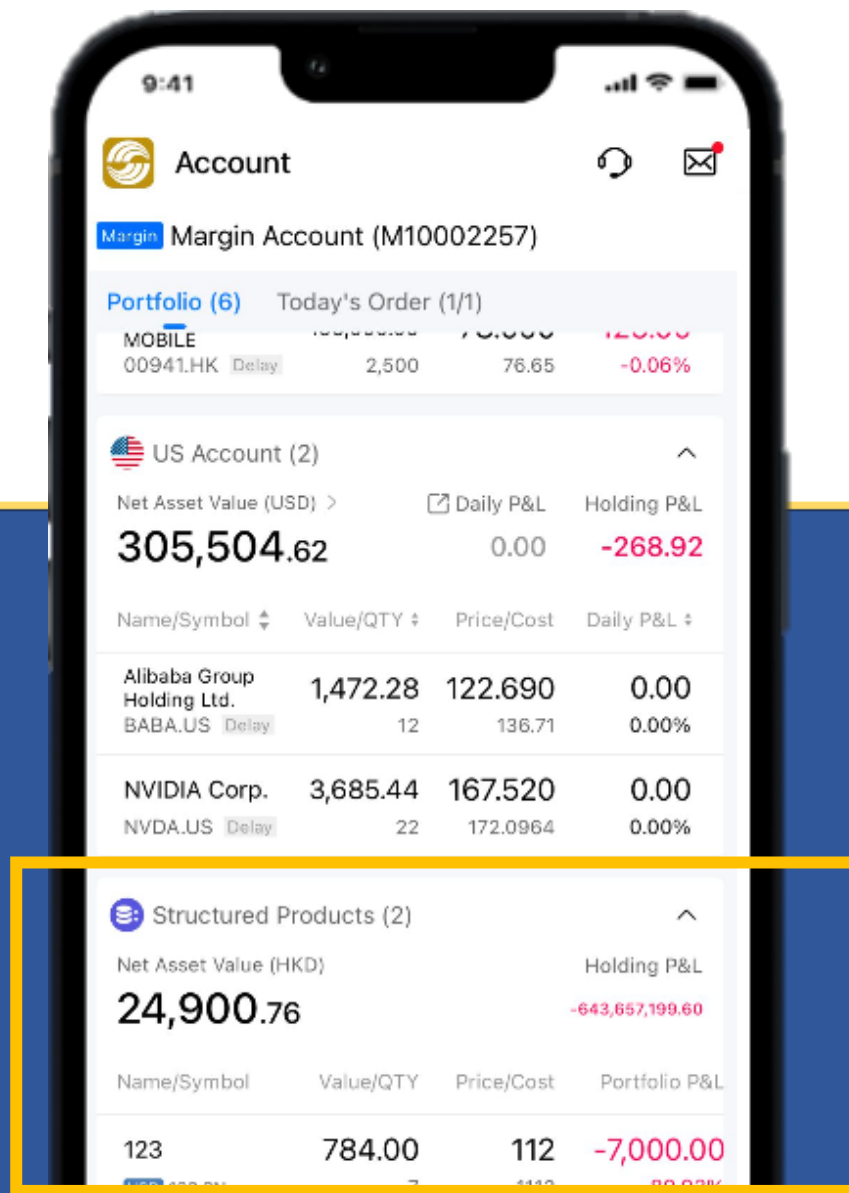


After reading the "Risk Disclaimer" and signing, you can submit the application.



Once your structured product account has been successfully opened, you may view the relevant holdings in the "Portfolio" section.

Please note that if you wish to place an order on structured products, kindly contact your relationship manager.



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