The smart investment platform

The Client Portal

User Guide

Introduction

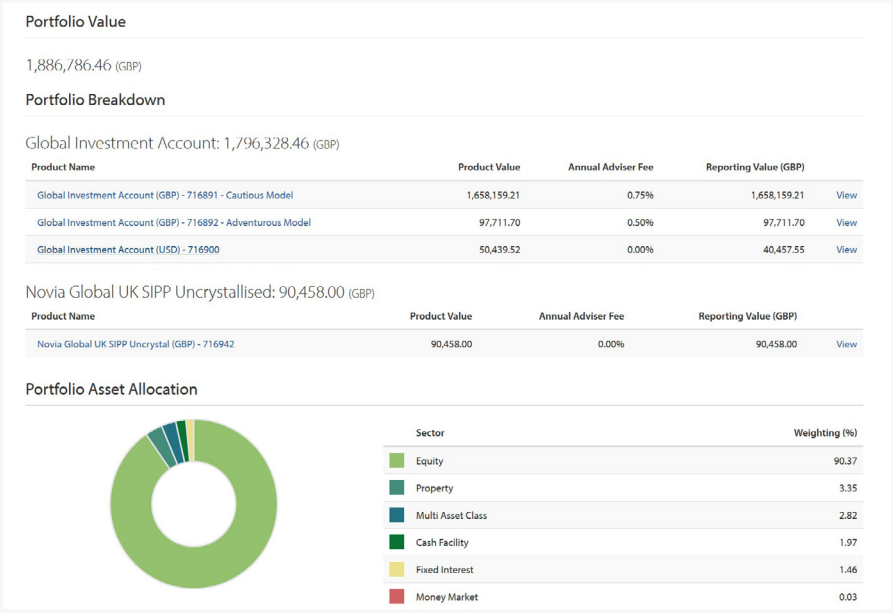
The Novia Global client portal allows clients to track all of the investments they hold on the Novia Global Platform. At the touch of a button it provides access to valuations and the detailed composition of portfolios.

As a secure, **view-only** online portal, the web portal is available wherever there is internet connectivity so clients are able to check on their investments at their convenience.

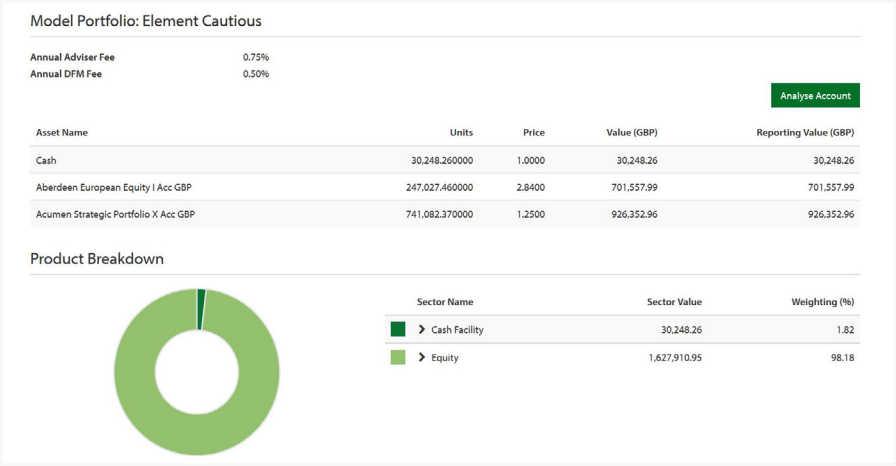
The web portal will automatically resize the display for easy use on mobiles, tablets and PCs and, by choosing to install the tile on the device, the service will be just one tap away.

Login details and instructions on how your clients access the portal are contained within the client **Welcome Pack** which they receive via email once they have been registered.v

A Client's View



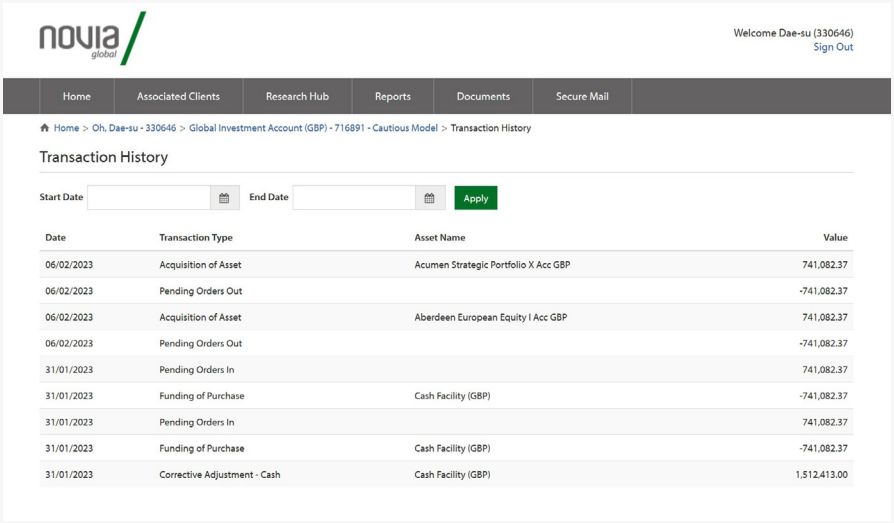
Upon logging in, clients will see a dashboard view on their home screen. It will show the total amount they hold on the Novia Global Platform, the value of funds by Product, and the overall asset allocation by sector.



Selecting a **Product** will reveal the investment funds it contains, the proportion of the sectors represented and their values.

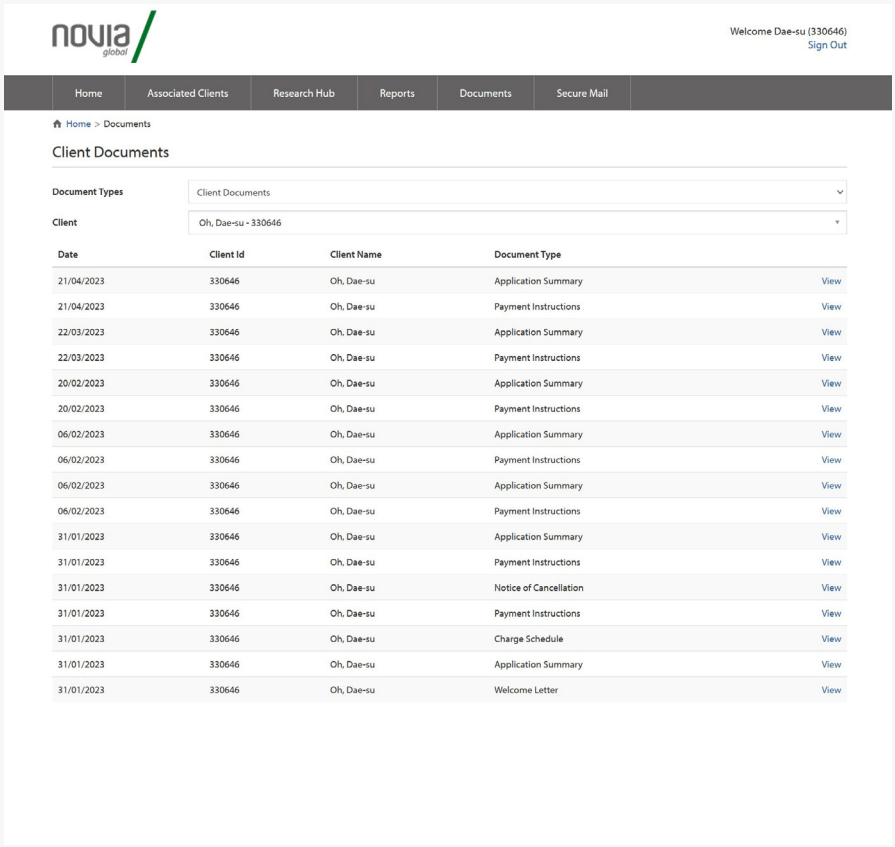
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Full Transparency



A fully transparent Transaction History is available and includes a full list of all money movements, including charges for any selected period of time.

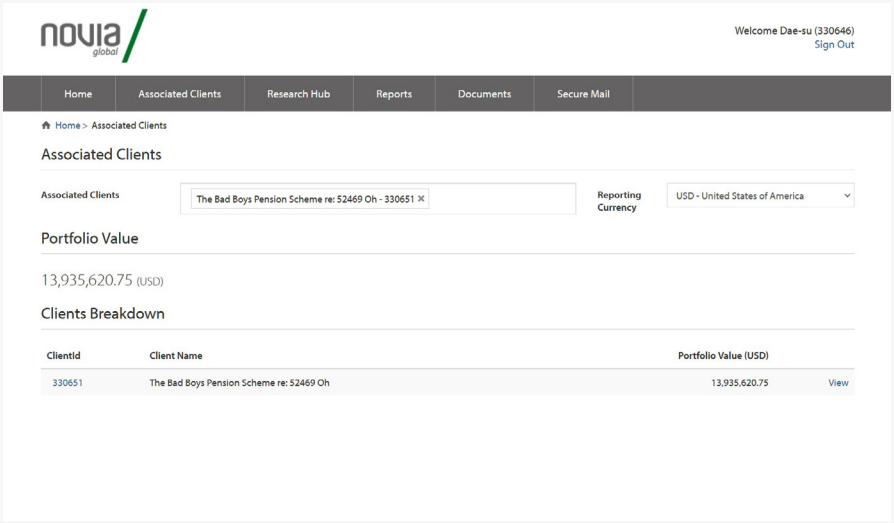
Documentation



Clients can access a library of important documents about their use of the Service alongside any adviser produced valuation reports. These are all available to view online or download as PDF's.

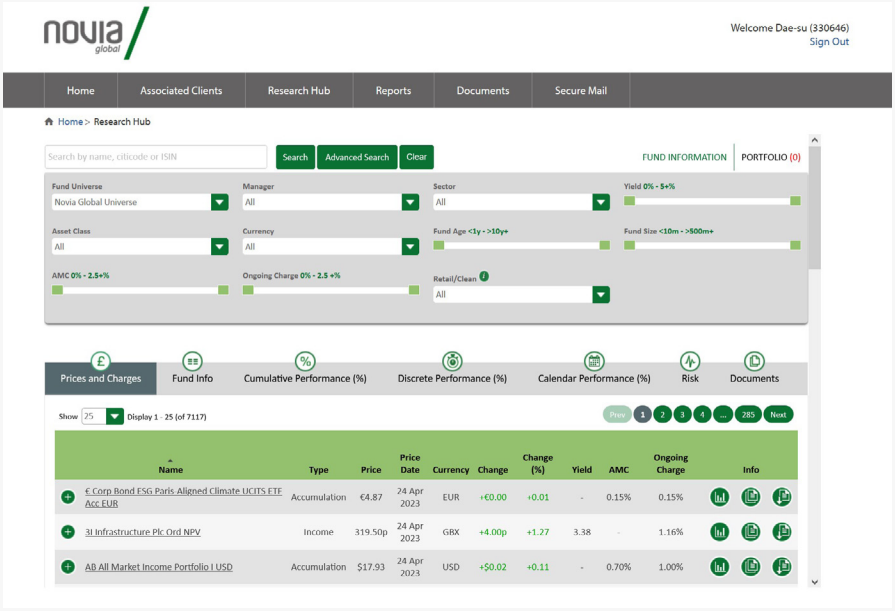
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Linked Accounts



Clients can also view the same level of detailed portfolio information on any other account that they are associated to (eg their spouse, or a trust). This also includes the functionality to select the appropriate reporting currency.

Research Hub



In addition, clients also have access to the **Research Hub** which provides information and performance data on a comprehensive range of funds.

Documentation provided by the fund managers is also available for download. This includes the fund factsheet, Key Investor Information Document, Supplementary Information Document, Prospectus, Annual Report, Product Highlights Sheet and the Key Facts Statement.

To support efficient communication and the effective provision of advice, you are able to see the same information in the same format as your clients.

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