

HSBC MPF – Service Channel Guide

You can view and manage your HSBC MPF account(s) anytime, anywhere via the following channels:

HSBC MPF Member Hotline

Call HSBC MPF Member Hotline and log on to the main menu

- i. Call (852) 3128 0128
- ii. Select preferred language
- iii. Enter your MPF membership number and MPF phone PIN for more options

Choose the service you need from the main menu, for example press

- ① to check the latest contribution received
- ② to check MPF account and fund balances
- ④ to change investment instructions

ATM service

Log on to ATM

Log on to HSBC or Hang Seng Bank ATM using your HSBC ATM card or credit card

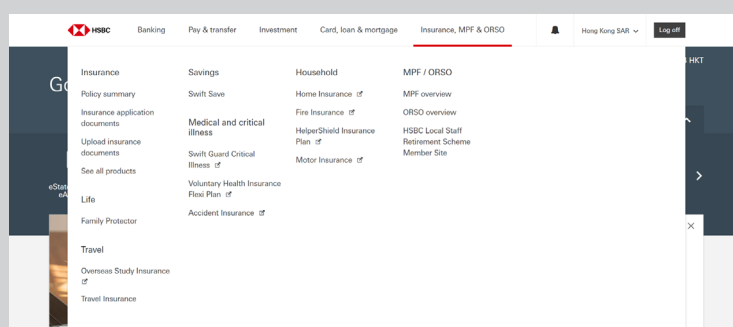
Select 'Other services' then 'MPF account enquiry' page

Check the latest contribution and account balance of MPF account (if applicable)

HSBC Online Banking

Log on to HSBC Online Banking to explore our MPF online services

- ◆ Logon to Online Banking at www.hsbc.com.hk
- ◆ From the top menu, select 'Insurance, MPF & ORSO'
- ◆ Select 'MPF overview' to access your MPF account



HSBC HK Mobile Banking app

Manage your MPF account on the go! Download the latest version to manage MPF account(s) and change your MPF investment instructions, as well as to review the latest performance of MPF funds anytime, anywhere.



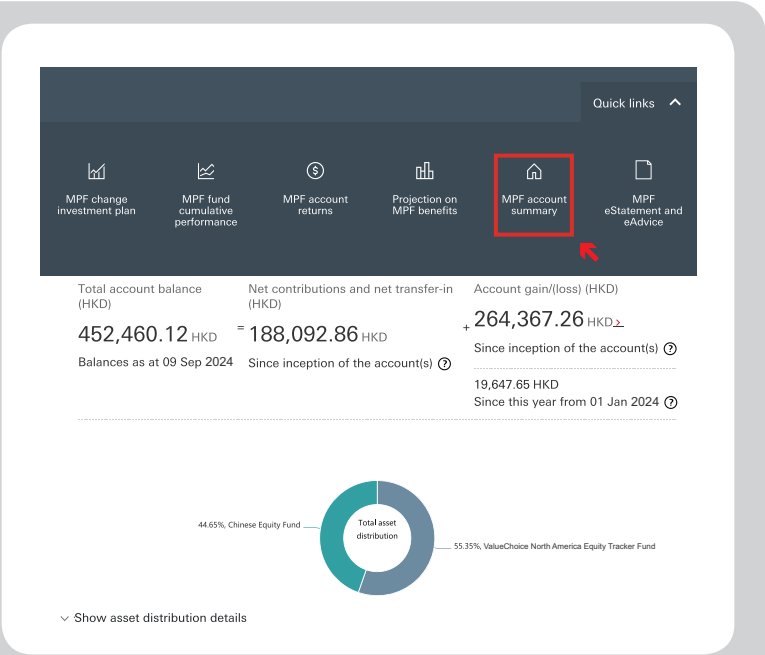
* You will be directed to app store after scanning this QR code

HSBC Online Banking

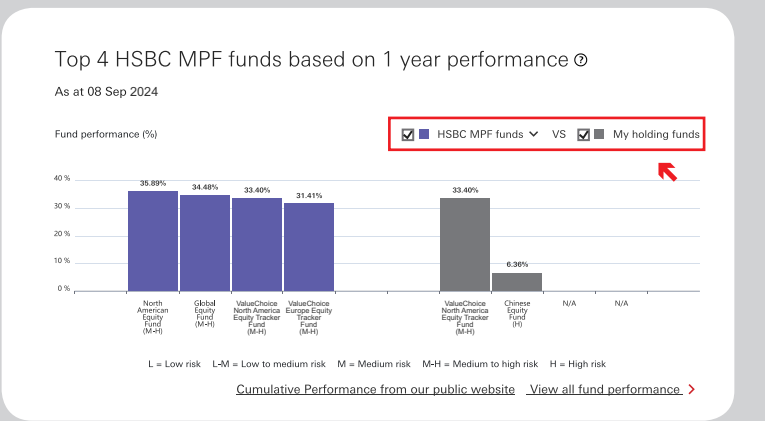
Explore our comprehensive MPF e-Services using HSBC Online Banking. You can manage your MPF account(s), view account details, check the latest fund performance and change your investment instructions.

View your MPF account summary

- Select 'MPF account summary' to view your account balances, details and account returns

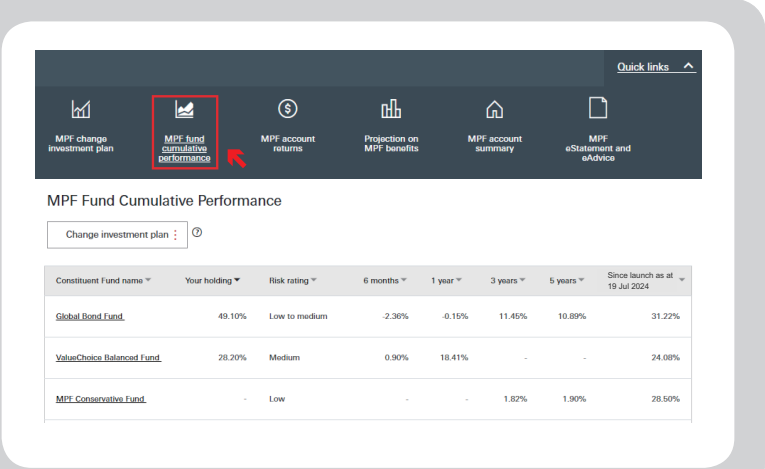


- On the same page, scroll down to compare the 1-year performance of your holding funds versus the top 4 HSBC MPF funds



View cumulative performance of MPF funds

- Select 'MPF fund cumulative performance' from the top menu to view the performance of all Constituent Funds for various investment periods



Change investment instructions

- ◆ Select 'MPF change investment plan' from the top menu to change your MPF investment instructions
- ◆ Four fund switching options are available for selection:
 1. Asset Switch – Change your existing investment allocation only
 2. Portfolio Rebalance – Change the investment allocation for both of your existing investments and new contributions
 3. Contribution Redirection – Change the investment allocation of your new contributions only
 4. Portfolio Rebalance to DIS – Change the allocation of both your existing investments and new contributions to DIS (Default Investment Strategy)

The screenshot shows the top navigation bar with icons for 'MPF change investment plan', 'MPF fund cumulative performance', 'MPF account returns', 'Projection on MPF benefits', 'MPF account summary', and 'MPF eStatement and eAdvice'. Below this, the 'Change Investment Plan' section is active, showing 'ASSET SWITCH | Step 1 of 5'. A red box highlights the 'Asset Switch' option in the left-hand menu. The main area is titled 'Select your account' and shows a dropdown menu for 'Account' with 'Personal Account' selected. Below the dropdown, it displays 'PERSONAL ACCOUNT HOLDER / 29999989' and 'PR01' with a balance of 'HKD 452,460.12'.

View account returns

- ◆ Select 'MPF account returns' from the top menu to view your account balances and account returns
- ◆ You can also view your account returns for each account and each Constituent Fund individually on this page

The screenshot shows the 'MPF Member Returns' page. At the top, there's a navigation bar with icons for 'MPF change investment plan', 'MPF fund cumulative performance', 'MPF account returns' (highlighted with a red box), 'Projection on MPF benefits', 'MPF account summary', and 'MPF eStatement and eAdvice'. Below this, the 'MPF Member Returns' section is displayed. It includes a table for 'Total account balance (HKD)' and 'Net contributions and net transfer-in (HKD)' with values for 'Balances as at 07 Jul 2024' and 'Since inception of the account(s)'. Below this, there's a table for 'Constituent Fund name' with columns for 'Units', 'Unit price (HKD)', 'Balance (HKD)', 'Returns since inception (HKD)', and 'Returns YTD (HKD)'. The table lists four funds: Asia Pacific Equity Fund, Global Equity Fund, North American Equity Fund, and Hang Seng Index Tracking Fund.

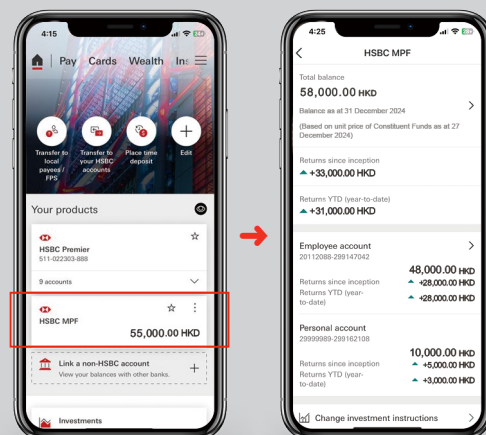
Constituent Fund name	Units	Unit price (HKD)	Balance (HKD)	Returns since inception (HKD)	Returns YTD (HKD)
Asia Pacific Equity Fund	0.000	41.95	0.00	+ 19,598.22	+ 2,454.20
Global Equity Fund	6,022.912	20.53	123,650.38	+ 1,204.57	+ 1,204.57
North American Equity Fund	1,333.527	25.23	33,644.89	+ 782.30	+ 782.30
Hang Seng Index Tracking Fund	0.000	29.05	0.00	+ 1,103.34	+ 468.50

HSBC HK Mobile Banking app

You can now use our mobile app to access and manage your MPF account anytime, anywhere. View your account details, check the latest fund performance and change your investment instructions.

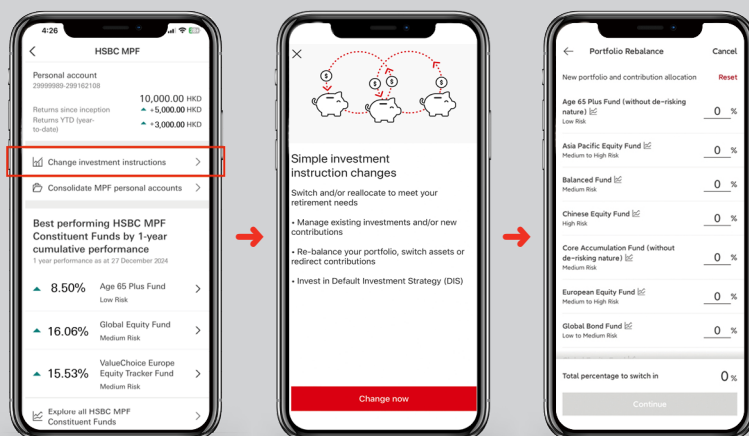
View your MPF account summary

- Select 'HSBC MPF' to view your MPF account details such as your account balance, account returns and the best performing Constituent Funds



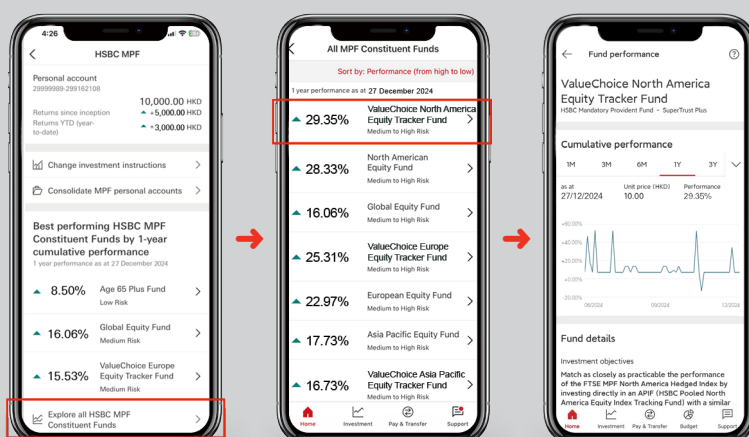
Change investment instructions

- Select 'Change investment instructions' on HSBC MPF homepage to change your investment instructions through portfolio rebalance, asset switch, contribution redirection or switch into DIS (Default Investment Strategy)



Check fund performance

- Scroll down on HSBC MPF homepage and select 'Explore all HSBC MPF Constituent Funds' to view the performance of all Constituent Funds
- Click on the fund name to review the cumulative performance of the relevant Constituent Fund since launch



* The above screen displays are for illustration purpose only and does not constitute any form of investment advice or recommendation.