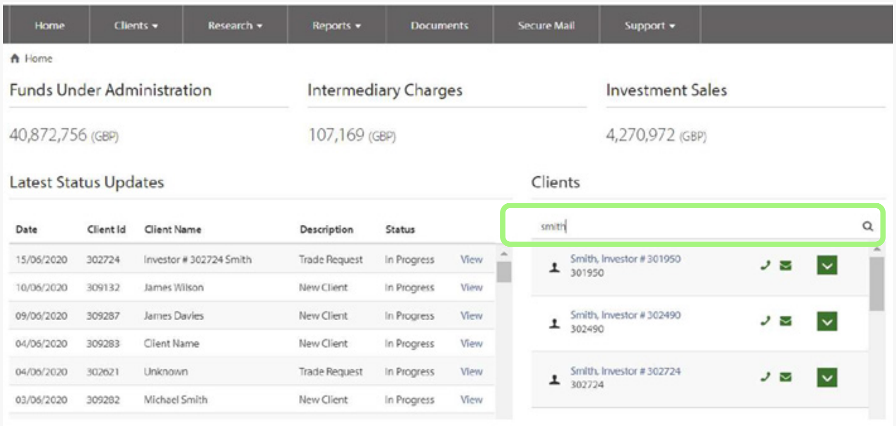
The smart investment platform

novia global europe

How to buy funds

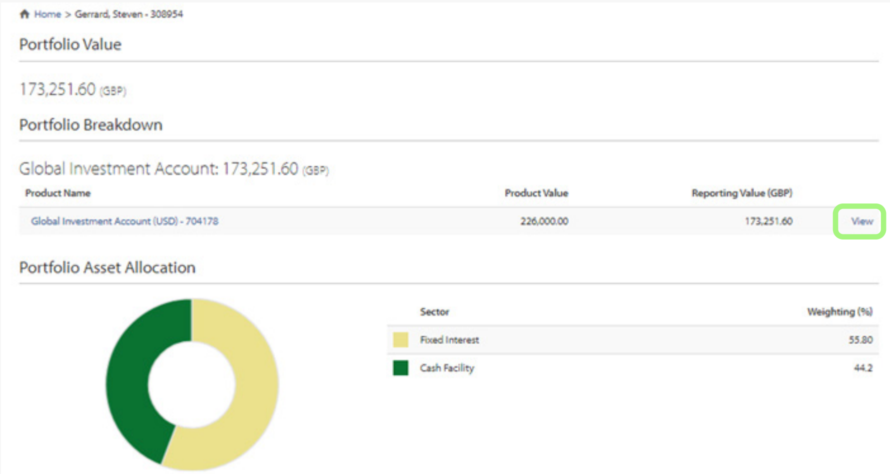
User Guide

Buying Funds



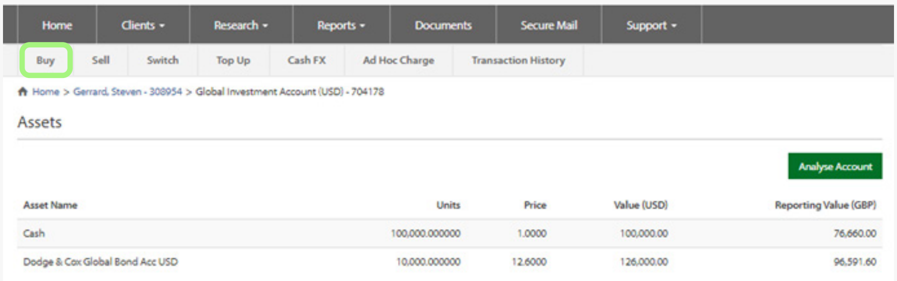
Step 1

After initially logging into the platform, search for the required client.



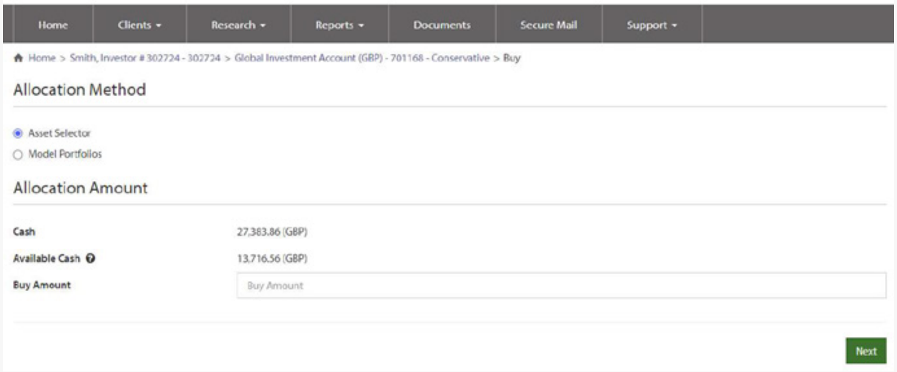
Step 2

Select the required product.



Step 3

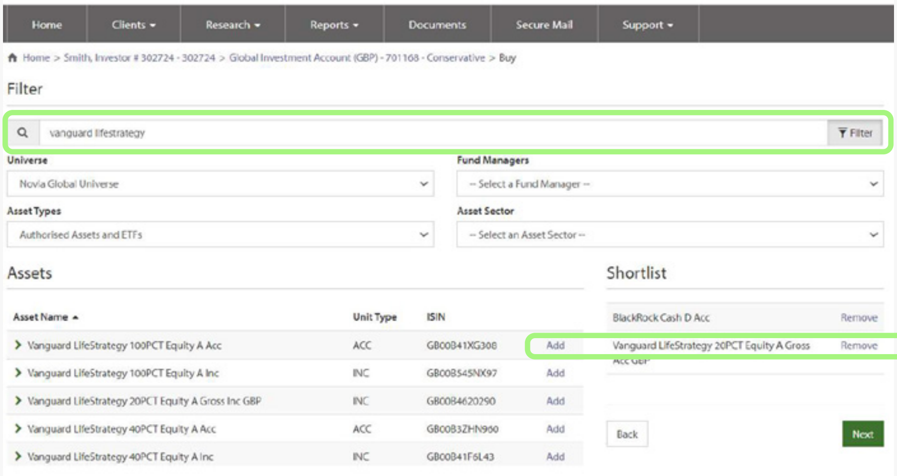
Select "Buy" from the process menu.



Step 4

Select "Asset Selector" to access funds list.

You can also see the details of total cash in the transaction amount and the available amount (taking into account any trades in progress, charges etc).

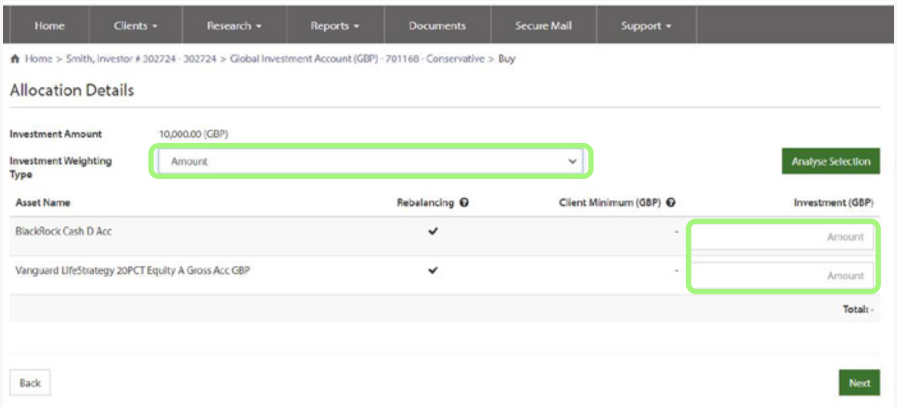


Step 5

Select the required funds to purchase.

In the field, enter fund name or ISIN code to search for required funds.

Click "Add" to place required funds into Shortlist

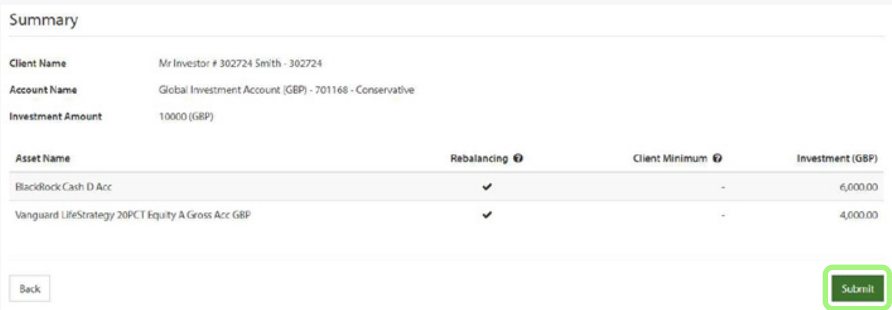


Step 6

Enter the purchase amount(s).

You have the option to trade in monetary amounts or %.

Amounts need to equal the total "Investment Amount" (or 100% if working in %) a warning will appear, and you cannot continue if there is a discrepancy with the total.



Step 7

A summary is shown of the assets you have selected to buy. Click "Submit" to proceed.

The progress of the trades will then be updated on the homepage, a Contract Note will be automatically saved into client documents and an email is sent to the client notifying them that they have "new documentation available" to view in their online access portal.