



**HSBC** ties up with  
ICICI Securities Limited  
to offer a retail trading  
account on a referral basis

## Why wait, when you can now have access to an integrated Savings, Demat and Trading Account at your fingertips!

We're excited to bring to you the capability to link your HSBC Savings and Demat accounts to retail trading account through our referral services with ICICI Securities Limited (I-Sec). Introducing **Simply Invest** on the 'HSBC India' Mobile app and HSBC Internet Banking. Now enjoy seamless trading, executed at speed!

You can now avail virtually the entire range of investment products, from Mutual Funds, Portfolio Management Services<sup>#</sup>, Alternative Investment Funds<sup>#</sup> and Bonds\* to now Securities Trading<sup>#</sup> including Direct Equity – Domestic and International, Derivatives, Currency trading facilities, etc. with us.

### Key Benefits

- ✓ Paperless retail trading account opening.
- ✓ Curated experience, complementing our existing wealth offerings available through our digital platforms.
- ✓ Consolidated Holding: View your HSBC Demat holdings on your I-Sec trading account.
- ✓ Special Brokerage discount.
- ✓ Additional Benefits, such as eATM, paperless delivery instructions, Global Equity Trading, etc.



### ICICI Direct Trading Account Opening

- Online account opening using Digilocker (Aadhaar based)
- End-to-End Digital process: no manual intervention
- Documents required: Mobile/E-mail ID | PAN | Aadhaar Number | Signature on a paper | Cancelled cheque leaf | Bank Account number (HSBC) | HSBC Demat Client ID

**Eligibility Criteria – Resident Indian National | Savings and Single Demat Account with HSBC**

**Don't have a Demat account with HSBC?**  
Visit the Demat desk of your nearest HSBC India branch or connect with your Relationship Manager

**Disclaimers:**

Purchase of any insurance products by a customer is purely voluntary and is not linked to avilment of any other facility from HSBC India.

BEWARE OF SPURIOUS/FRAUD CALLS! IRDAI is not involved in activities like selling insurance policies, announcing bonus or investment of premiums. Public receiving such phone calls are requested to lodge a police complaint.

The Life Insurance products are offered and underwritten by Canara HSBC Life Insurance Limited (Insurer) (IRDAI Regn. No. 136) having its head office at 139 P, Sector 44, Gurgaon - 122 003, Haryana (India). HSBC India (IRDAI Registration Number: CA0016), having its India corporate office at 52/60, M. G. Road, Fort, Mumbai - 400 001, is the Corporate Agent of the Insurer.

The General Insurance products are offered and underwritten by ICICI Lombard General Insurance Company Limited (IRDA Regn. No. 115) ('Insurer') Registered Office Address: ICICI Lombard House, 414, Veer Savarkar Marg, Prabhadevi, Mumbai - 400 025. HSBC India (IRDAI Regn. No. CA0016) having its India Corporate Office 52/60, M. G. Road, Fort, Mumbai - 400 001, is a corporate agent of the Insurer.

The contract of insurance is between the Insurer and the insured and not between HSBC India and the insured. HSBC India does not act as an insurer or underwrite the risks and does not accept any responsibility for any decision made by the Insurer. Settlement of claims is not the obligation of HSBC India. For more details on risk factors, terms and conditions, please read the sales brochure for the relevant insurance product carefully before concluding a sale.

HSBC India currently offers investment products from third party entities registered and regulated in India.

Mutual fund investments are subject to market risks. Please read the Scheme Information Document (SID), Statement of Additional Information (SAI), Key Information Memorandum (KIM) and addendums, as applicable, issued from time to time, carefully before investing.

HSBC does not distribute or offer through referral investment products to those persons who are either the citizens or residents of United States of America (USA), Canada, Australia or New Zealand or any other jurisdiction where such distribution would be contrary to law or regulation.

PMS and AIF are available to eligible premier customers basis net worth and/or risk profiling assessment. HSBC India only refers you to the AMC for fulfilment of your needs. The decision to offer PMS/AIF to you will be taken independently by the AMC. Please read the PMS/AIF Disclosure Document and proceed only if you agree to the same and independently assess the same to be suitable for you.

The facility to open a trading account is offered by ICICI Securities Limited ('I-Sec') and not by HSBC India. If you are interested in opening a trading account, HSBC India shall refer you to I-Sec and the decision to offer a trading account to you will be independently taken by I-Sec, subject to the terms and conditions stipulated by I-Sec from time to time.

Bonds are offered by HSBC India solely on your request. HSBC India does not provide any advice or recommendation in relation to transactions in Bonds and merely assists you to execute your transaction. Bonds are independently managed by the respective issuer of the Bonds. Please read the offer documents of the Bonds under your consideration carefully before investing.

For Loans Against Securities, HSBC India only refers you to HSBC InvestDirect Financial Services Ltd. (HIFSL) to fulfil your requirements. HSBC India referring you to HIFSL does not constitute investment/lending advice or an offer or a solicitation for an offer to avail financing from HIFSL. The facility is independently offered by HIFSL on such terms and conditions as may be stipulated by HIFSL from time to time. You are advised to read and understand the relevant terms and conditions and obtain appropriate legal, accounting or tax advice where necessary, prior to availing of any facility.