



Principal TH

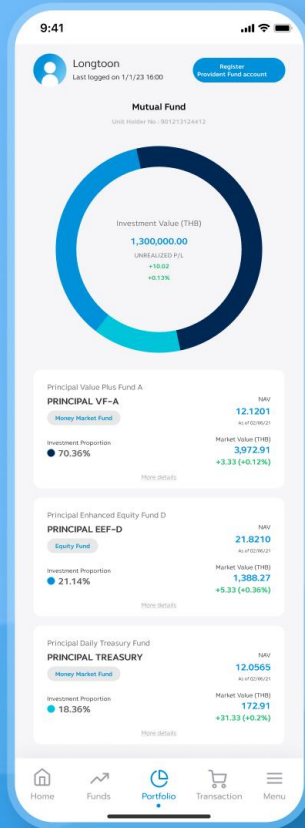
User manual



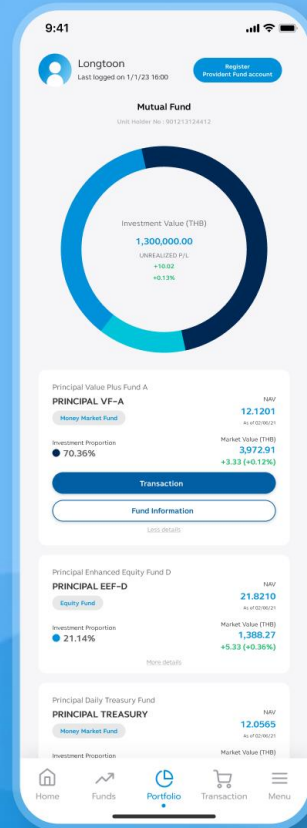
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Steps to Set up Automatic Transfer Service (ATS)	18
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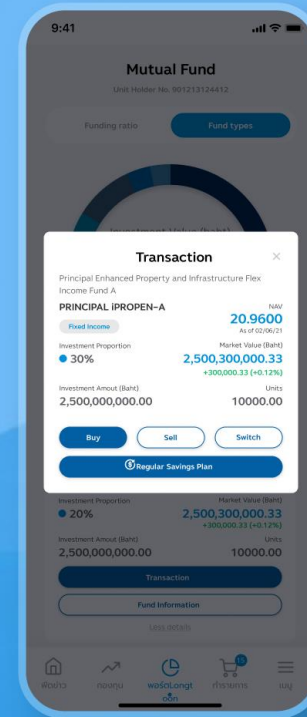
Steps for buying funds (Buy Fund)



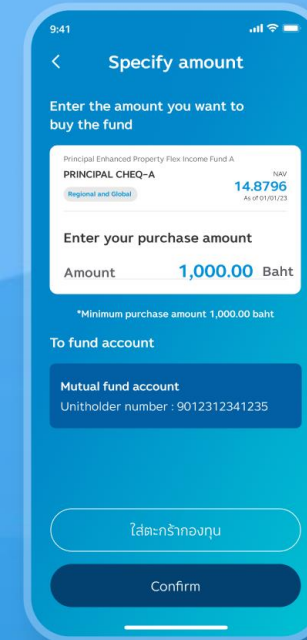
1. Fund portfolio



2. Select to make a transaction.

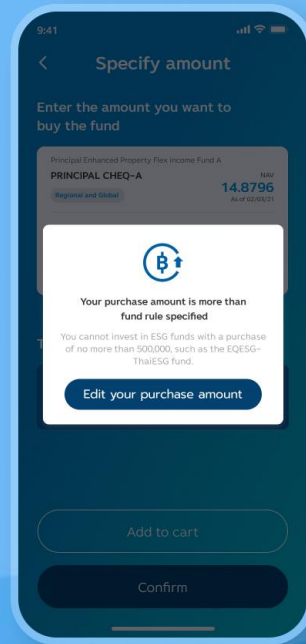


3. Make a fund purchase transaction

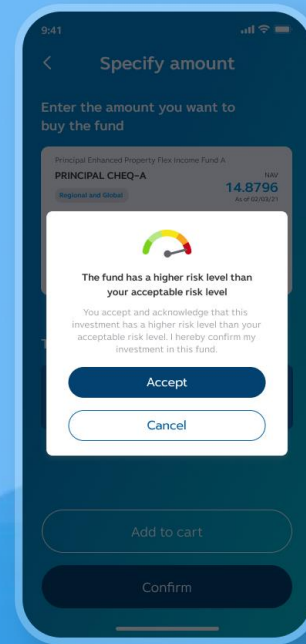


4. Specify the amount

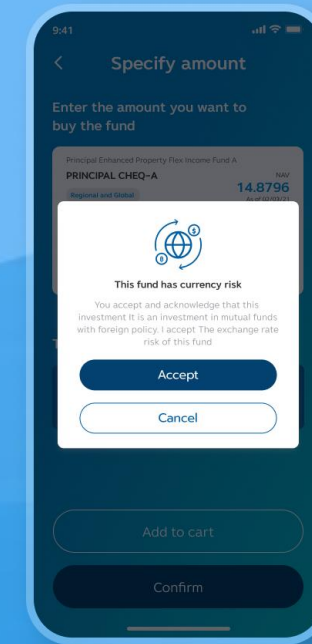
Warning message



“Your investment amount exceeds the limit.”

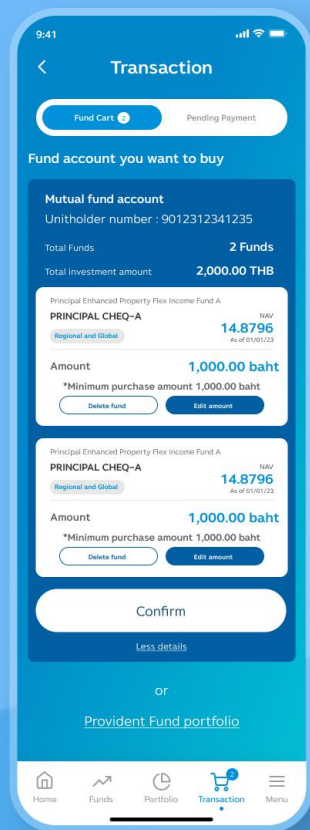


“This fund has higher risk than your risk level.”

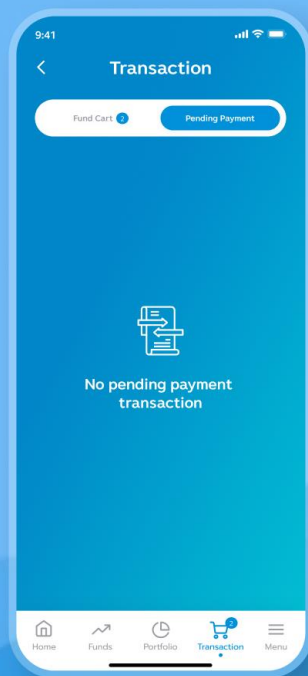


“This fund has exchange rate risk.”

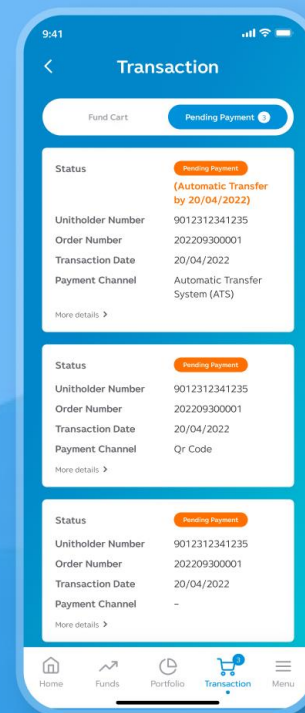
Steps for buying funds (Buy Fund)



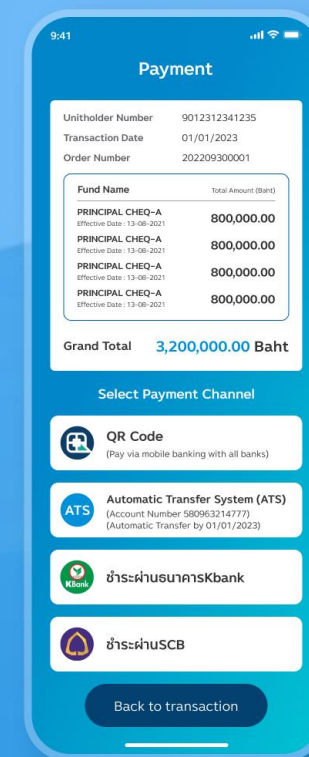
5. Confirm the transaction.



"In case there is no payment item"

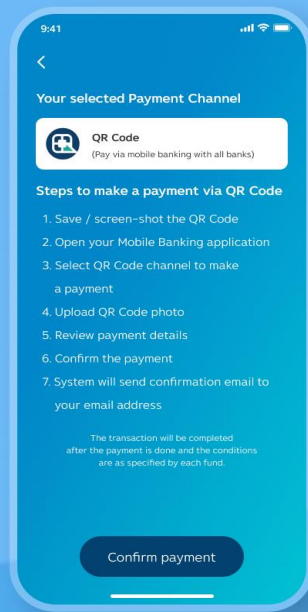


6. Transaction page waiting for approval

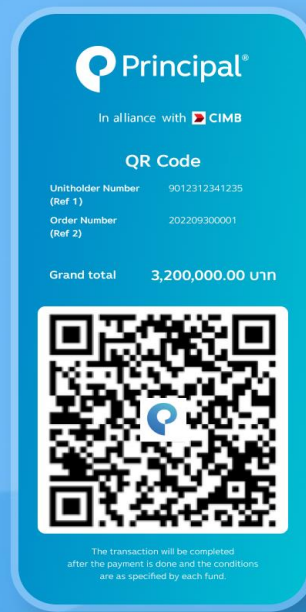


7. Qr Code

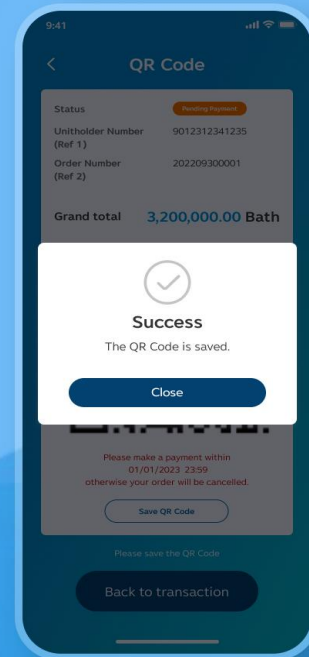
In the case of paying via Qr Code



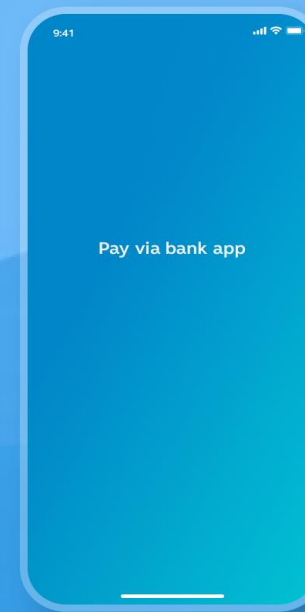
8. Confirm payment.



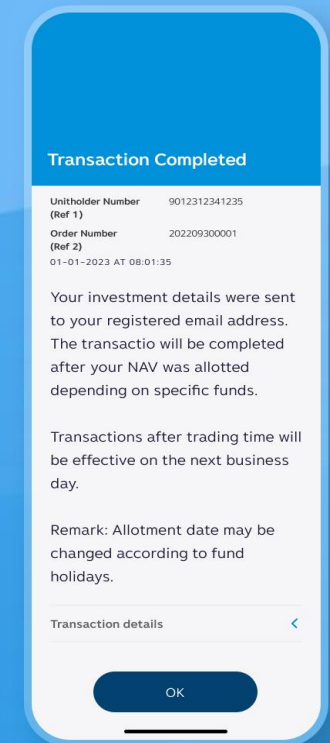
9. Pay via Qr code



10. Save Qr code

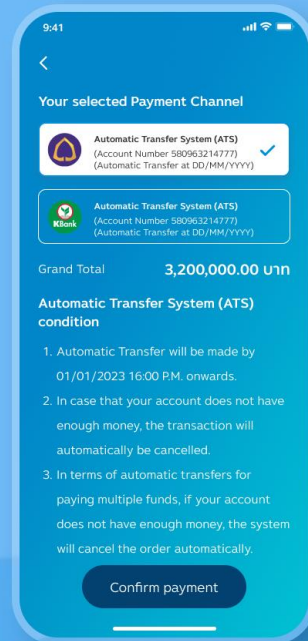


11. Pay via bank app

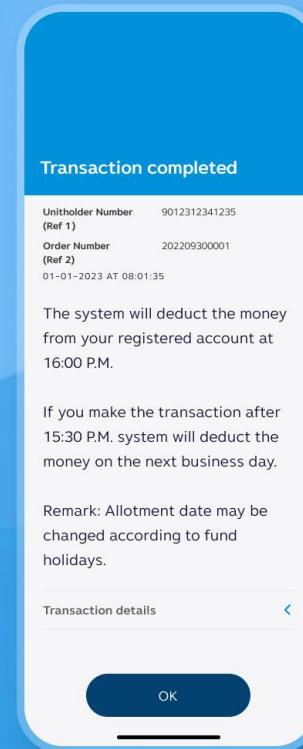


12. The transaction was completed successfully.

In the case of paying via Automatic Transfer Service (ATS)

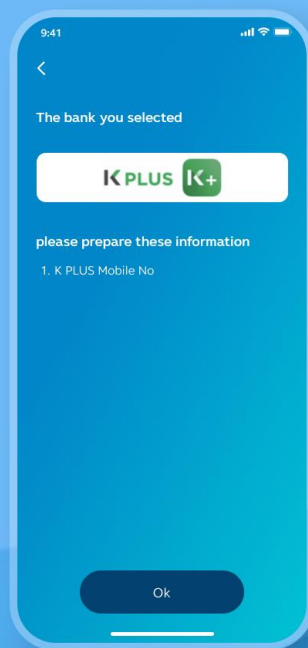


12. Confirm the item.

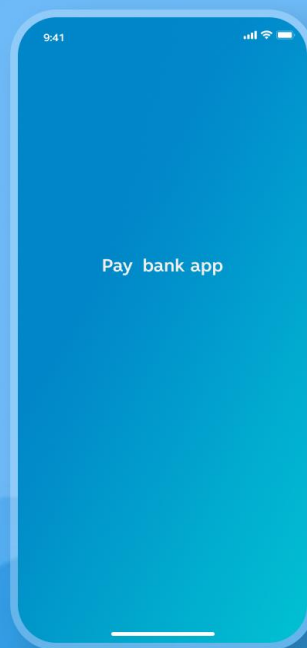


13. The transaction was completed successfully.

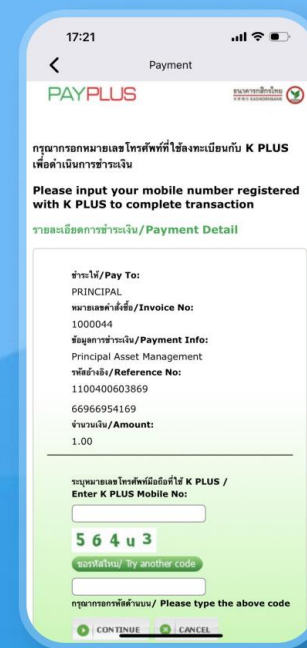
In case of payment via bank app



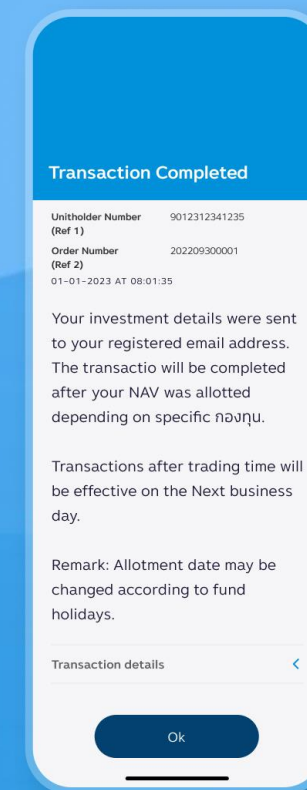
14. Select your bank



15. Pay via bank app

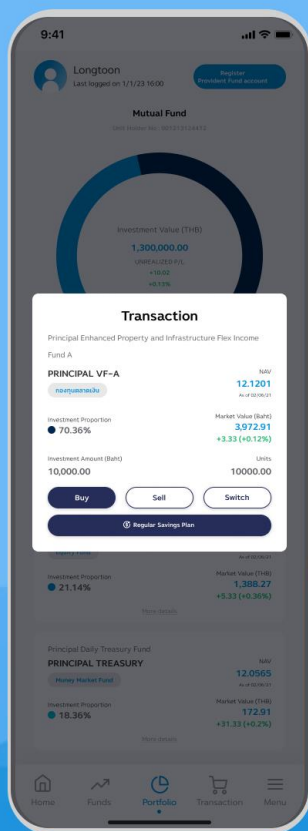


16. Pay via Kasikorn Bank

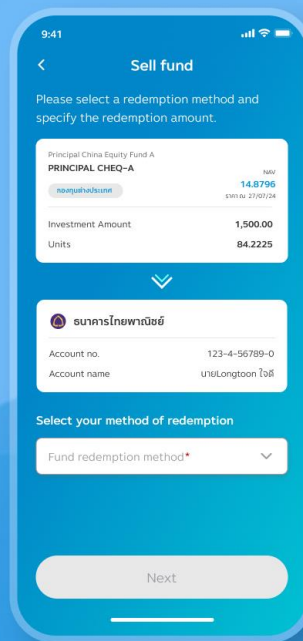


17. The transaction was completed successfully.

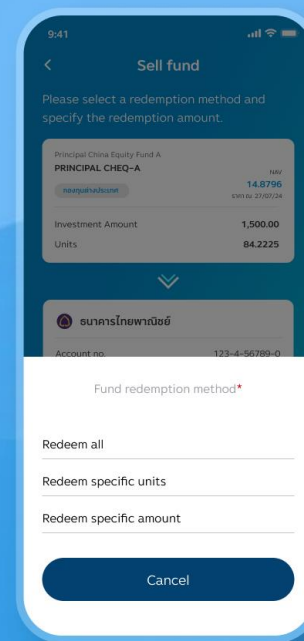
Steps for selling funds



1. Select to sell funds

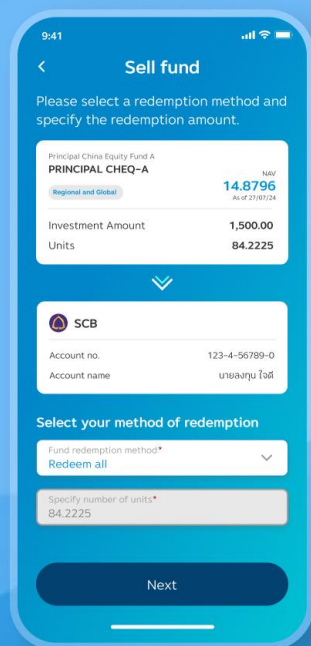


2. Select a fund selling method.



3. Click to select the fund selling method.

Steps for selling funds (in case of choosing to Redeem all)



9:41

< Sell fund

Please select a redemption method and specify the redemption amount.

Principal China Equity Fund A
PRINCIPAL CHEQ-A NAV
14.8796
Regional and Global As of 21/07/24

Investment Amount **1,500.00**
Units **84.2225**

SCB

Account no. 123-4-56789-0
Account name นายสมชาย ใจดี

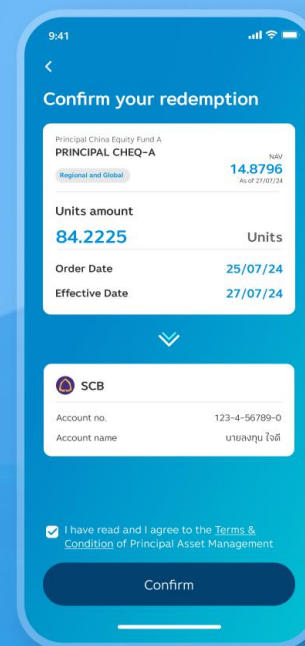
Select your method of redemption

Fund redemption method*
Redeem all

Specify number of units*
84.2225

Next

4. Select to Redeem all



9:41

< Confirm your redemption

Principal China Equity Fund A
PRINCIPAL CHEQ-A NAV
14.8796
Regional and Global As of 21/07/24

Units amount
84.2225 Units

Order Date **25/07/24**
Effective Date **27/07/24**

SCB

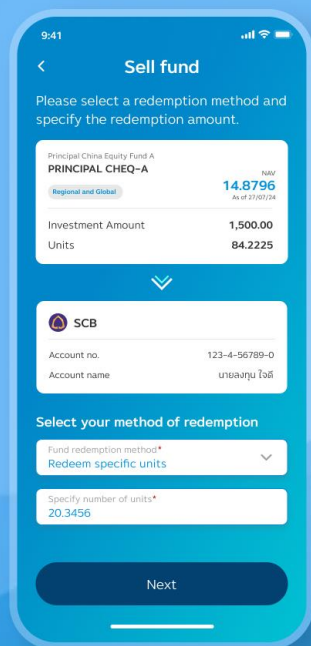
Account no. 123-4-56789-0
Account name นายสมชาย ใจดี

I have read and I agree to the [Terms & Condition](#) of Principal Asset Management

Confirm

5. Confirm the transaction.

Steps for selling funds (in case of choosing to Redeem specific units)



9:41

Sell fund

Please select a redemption method and specify the redemption amount.

Principal China Equity Fund A
PRINCIPAL CHEQ-A NAV
Regional and Global **14.8796**
As of 23/07/24

Investment Amount **1,500.00**
Units **84.2225**

SCB

Account no. 123-4-56789-0
Account name เมาบุญ ใจดี

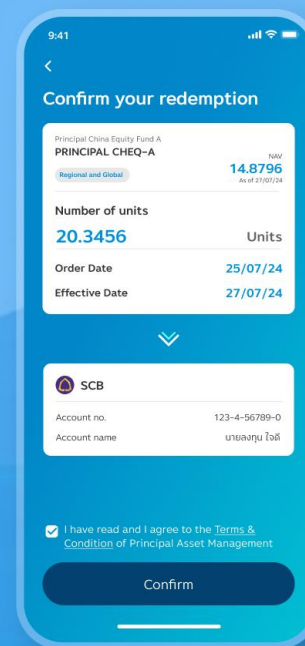
Select your method of redemption

Fund redemption method*
Redeem specific units

Specify number of units*
20.3456

Next

6. Select to Redeem specific units



9:41

Confirm your redemption

Principal China Equity Fund A
PRINCIPAL CHEQ-A NAV
Regional and Global **14.8796**
As of 23/07/24

Number of units
20.3456 Units

Order Date **25/07/24**
Effective Date **27/07/24**

SCB

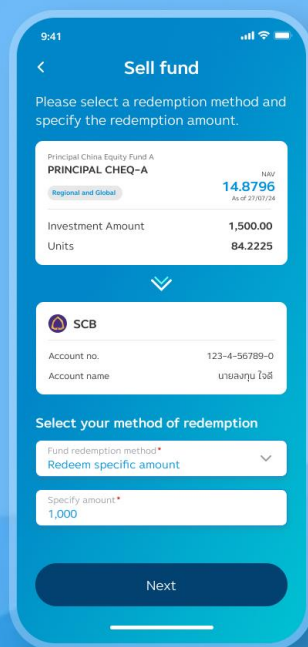
Account no. 123-4-56789-0
Account name เมาบุญ ใจดี

I have read and I agree to the [Terms & Condition](#) of Principal Asset Management

Confirm

7. Confirm the transaction.

Steps for selling funds (in case of choosing to Redeem specific amount)



9:41

< Sell fund

Please select a redemption method and specify the redemption amount.

Principal China Equity Fund A
PRINCIPAL CHEQ-A NAV
Regional and Global 14.8796
As of 23/07/24

Investment Amount 1,500.00
Units 84.2225

SCB
Account no. 123-4-56789-0
Account name ธนาคาร ไทย

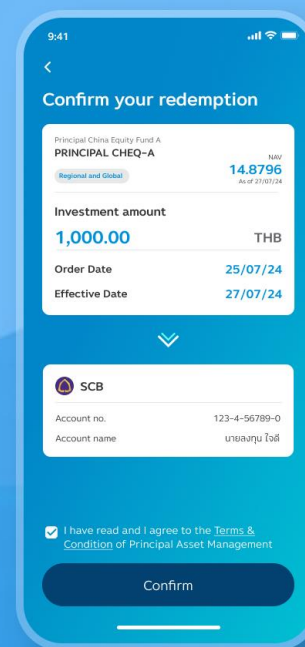
Select your method of redemption

Fund redemption method*
Redeem specific amount

Specify amount*
1,000

Next

8. Select to Redeem specific amount.



9:41

< Confirm your redemption

Principal China Equity Fund A
PRINCIPAL CHEQ-A NAV
Regional and Global 14.8796
As of 23/07/24

Investment amount
1,000.00 THB

Order Date 25/07/24
Effective Date 27/07/24

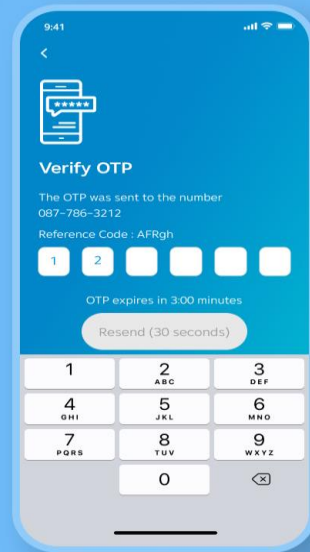
SCB
Account no. 123-4-56789-0
Account name ธนาคาร ไทย

I have read and I agree to the Terms & Condition of Principal Asset Management

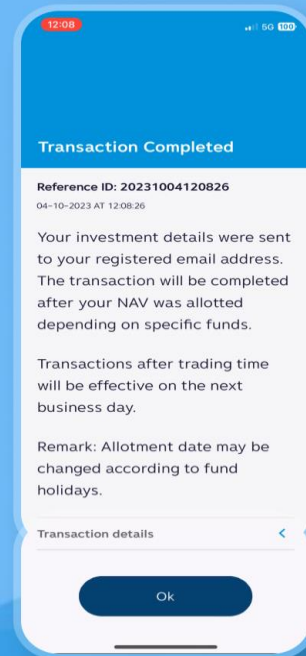
Confirm

9. Confirm the transaction.

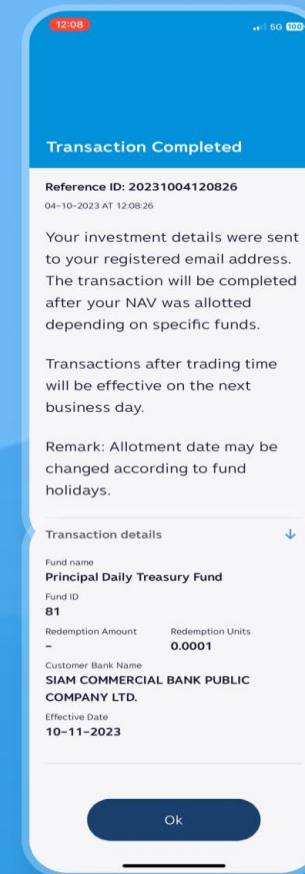
Steps for selling funds (Confirmation of Transaction)



10. Confirm OTP

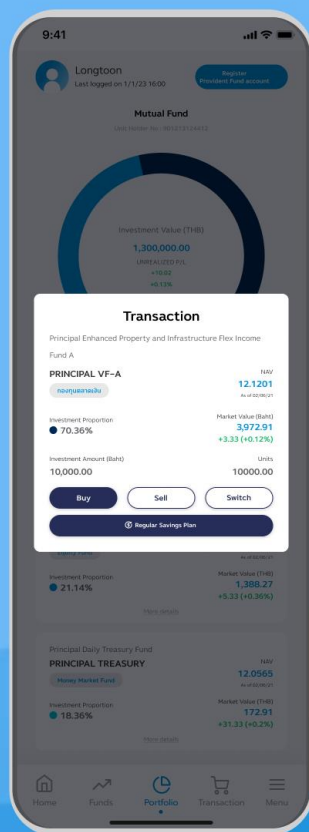


11. Completed the transaction

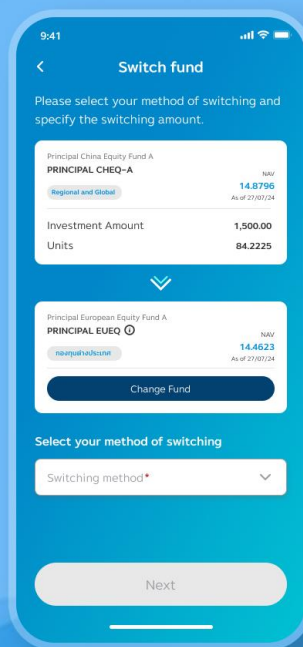


12. Completed the transaction

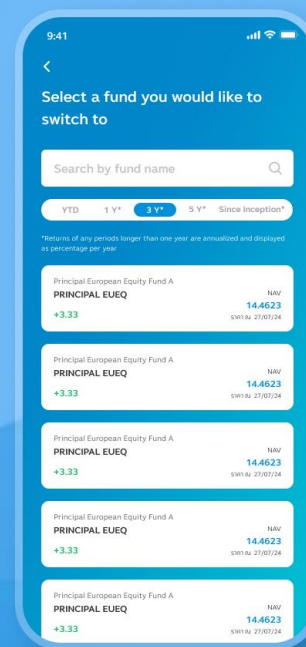
Steps for switching funds



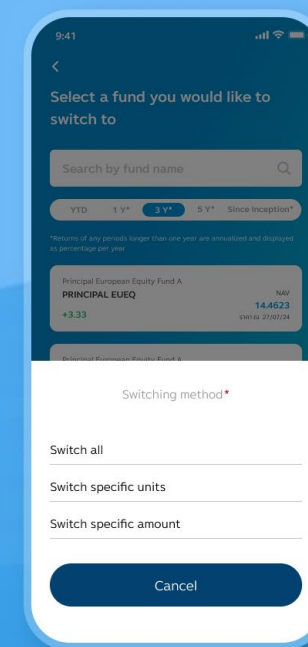
1. Select a mutual fund



2. Select the fund you want to switch.

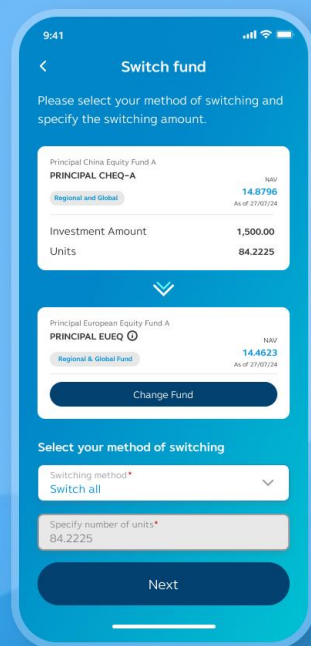


3. Select a fund switching method.

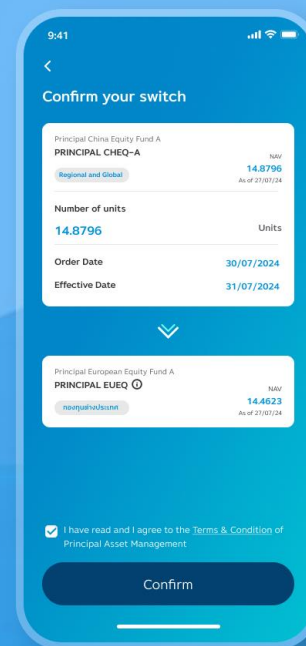


4. Select the switching method

Steps for switching funds (In case of choosing to switch fund all)



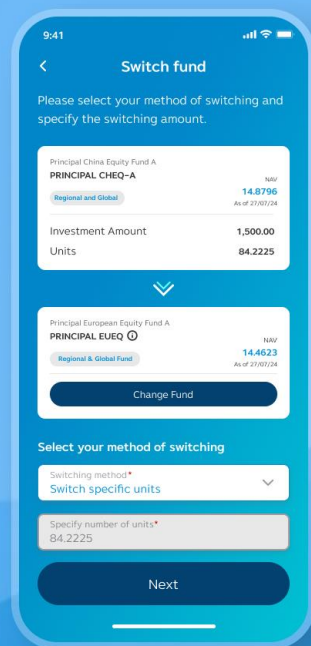
5. Select to Switch all



6. Confirm the transaction.

Fund switching procedure

(In case of choosing to Switch specific units)



9:41

Switch fund

Please select your method of switching and specify the switching amount.

Principal China Equity Fund A
PRINCIPAL CHEQ-A NAV 14.8796
Regional and Global As of 21/07/24

Investment Amount 1,500.00
 Units 84.2225

Principal European Equity Fund A
PRINCIPAL EUEQ NAV 14.4623
Regional & Global Fund As of 21/07/24

Change Fund

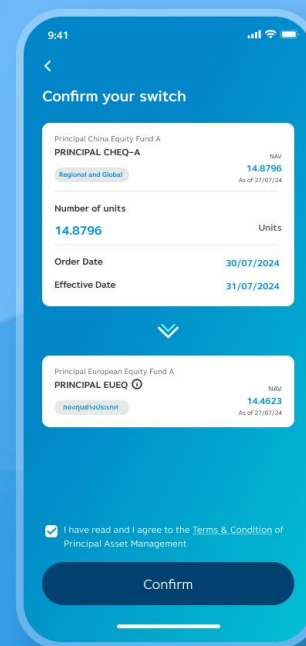
Select your method of switching

Switching method*
 Switch specific units

Specify number of units*
 84.2225

Next

7. Select to Switch specific units



9:41

Confirm your switch

Principal China Equity Fund A
PRINCIPAL CHEQ-A NAV 14.8796
Regional and Global As of 21/07/24

Number of units
 14.8796 Units

Order Date 30/07/2024
 Effective Date 31/07/2024

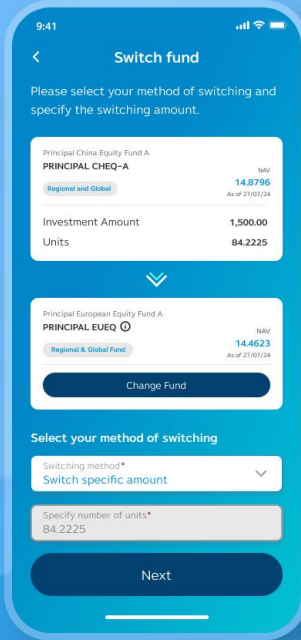
Principal European Equity Fund A
PRINCIPAL EUEQ NAV 14.4623
Regional & Global Fund As of 21/07/24

I have read and I agree to the Terms & Condition of Principal Asset Management

Confirm

8. Confirm the transaction.

Fund switching procedure (In case of choosing to Switch specific amount)



9:41

Switch fund

Please select your method of switching and specify the switching amount.

Principal China Equity Fund A
PRINCIPAL CHEQ-A NAV
Regional and Global 14.8796
As of 27/07/24

Investment Amount 1,500.00
Units 84.2225

Change Fund

Principal European Equity Fund A
PRINCIPAL EUEQ NAV
Regional & Global Fund 14.4623
As of 27/07/24

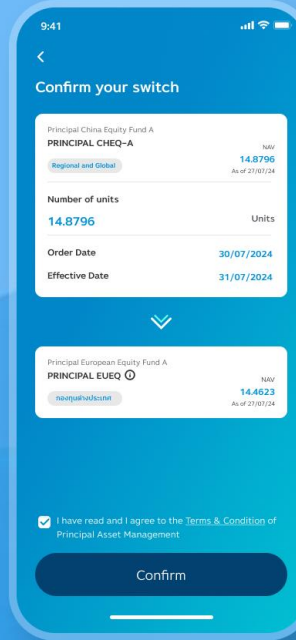
Select your method of switching

Switching method*
Switch specific amount

Specify number of units*
84.2225

Next

9. Select to Switch specific amount



9:41

Confirm your switch

Principal China Equity Fund A
PRINCIPAL CHEQ-A NAV
Regional and Global 14.8796
As of 27/07/24

Number of units
14.8796 Units

Order Date 30/07/2024
Effective Date 31/07/2024

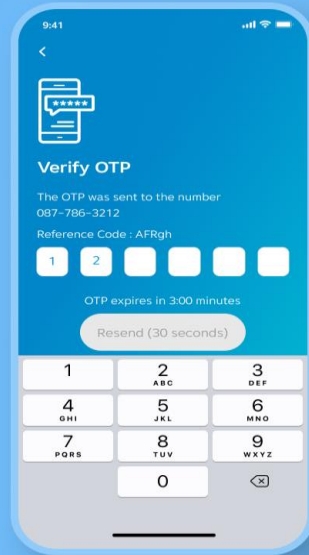
Principal European Equity Fund A
PRINCIPAL EUEQ NAV
Regional & Global Fund 14.4623
As of 27/07/24

I have read and I agree to the Terms & Condition of Principal Asset Management

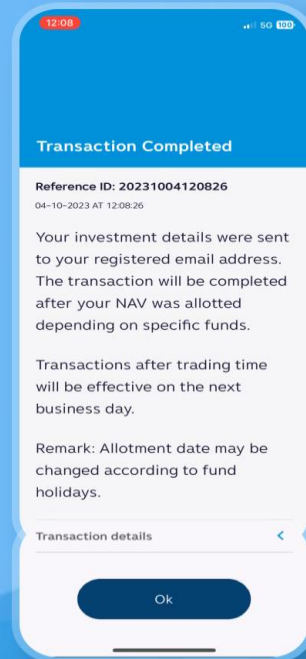
Confirm

10. Confirm the transaction.

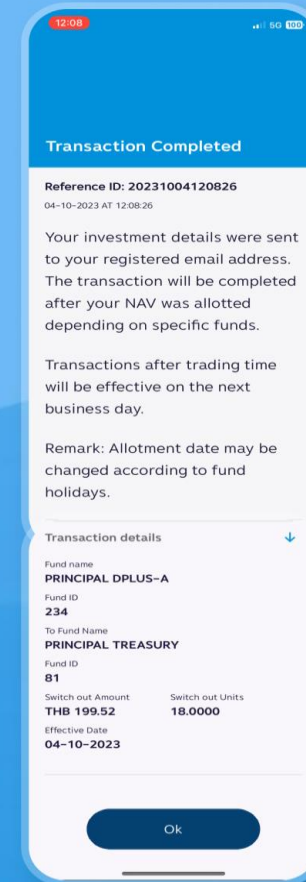
Steps for switching funds (confirmation of transaction)



11. Confirm OTP



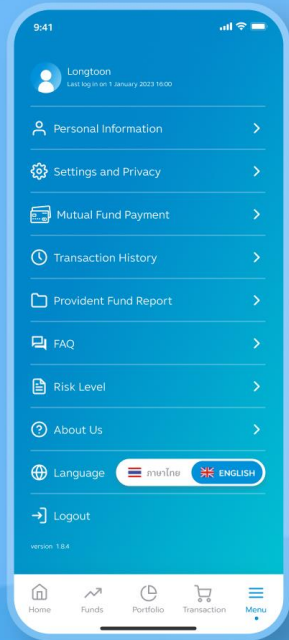
12. Completed the transaction



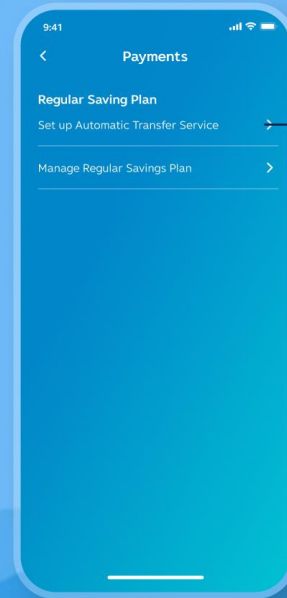
13. Completed the transaction

Steps to Set up Automatic Transfer Service (ATS)

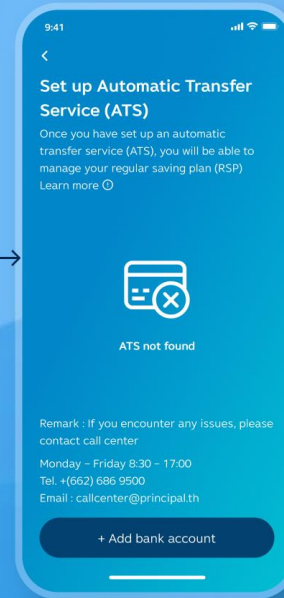
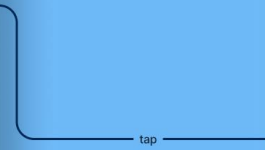
Steps to Set up Automatic Transfer Service (ATS)



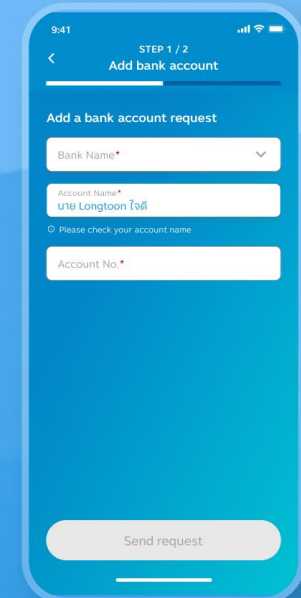
1. Mutual fund payments



2. Select to Set up Automatic Transfer Service



3. Press add bank account
“In case you don't have a savings account for ATS yet”



4. Fill in name information
Bank account number

Steps to Set up Automatic Transfer Service (ATS)

9:41 STEP 1 / 2 Add bank account

Add a bank account request

Bank Name*

Account Name*

Please check your account name

Bank Name*

Search by Bank Name

BBL

Krungsri

KBank

TTB

SCB

Cancel

5. Select your bank

9:41 STEP 1 / 2 Add bank account

Add a bank account request

Bank Name*

Account Name*

Please check your account name

Account No.*

Send request

6. Enter your bank account number.

9:41 STEP 1 / 2 Add bank account

Add a bank account request

Bank Name*

Account Name*

Please fill in account name

Account No.*

Please fill in account no.

Send request

"In case you haven't filled in the information and have a bank account"

9:41 STEP 1 / 2 Add bank account

Add a bank account request

Bank Name*

Account Name*

Account No.*

Send request

7. Press send request.

9:41

Verify OTP

The OTP was sent to the number 087-786-3212

Reference Code : AFRgh

1 2 3 4 5 6

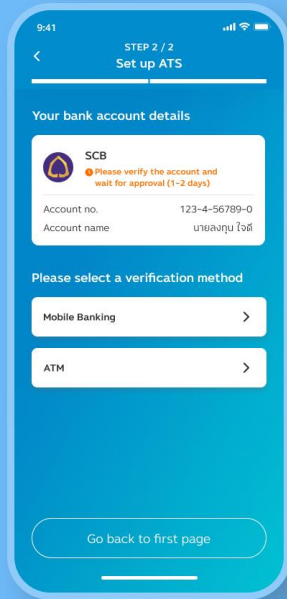
OTP expires in 3:00 minutes

Resend (30 seconds)

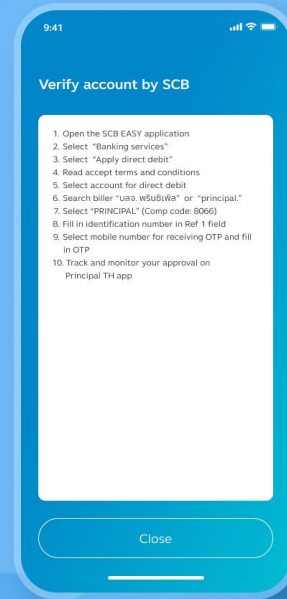
1 2 3
4 ABC 5 DEF
6
7 GHI 8 JKL 9 MNO
PQRS TUV WXYZ
0

8. Confirm OTP

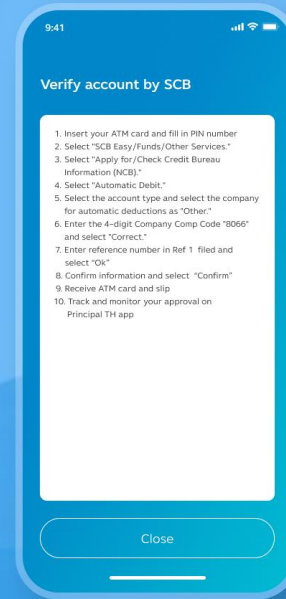
Steps to Set up Automatic Transfer Service (ATS)



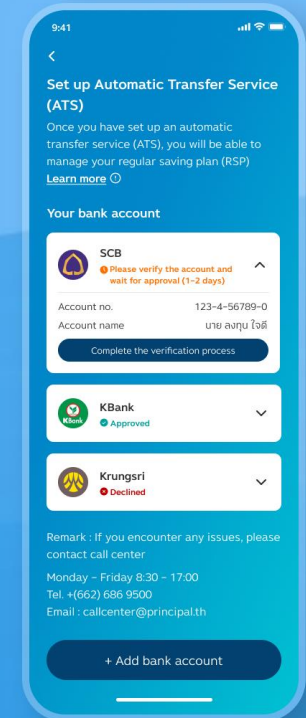
9. Click to select a verification method



“How to approve an account via via mobile application”



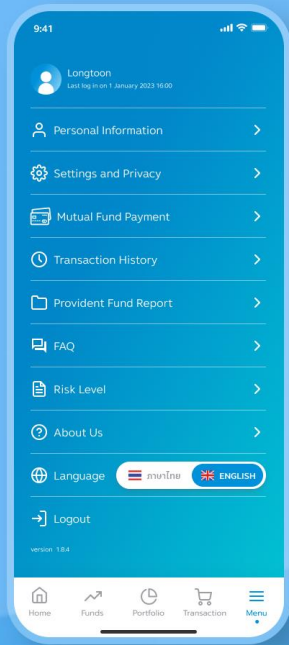
“How to approve an account via ATM”



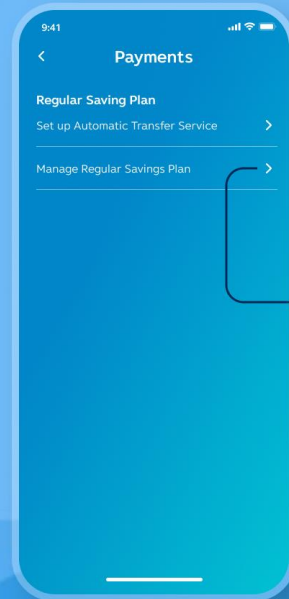
10. Request Details

Steps for managing a regular savings plan (RSP)

Steps for managing a regular savings plan (RSP)



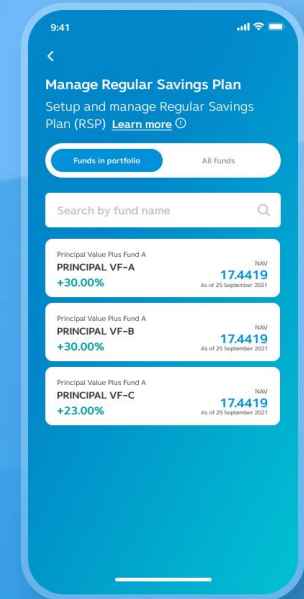
1. Mutual fund payments



2. Select Manage Regular Savings Plan

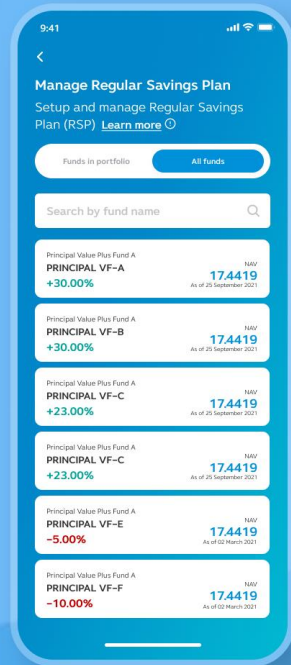


3. Setup Regular Savings Plan
(In the case where there is no regular savings plan management)

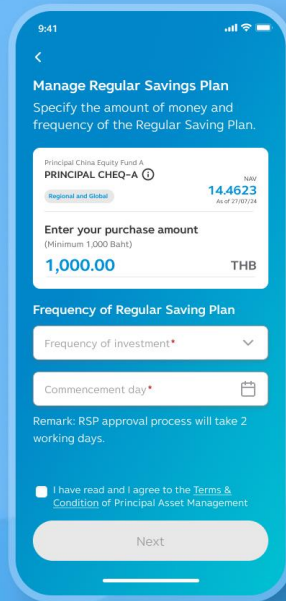


4. Press select Required funds

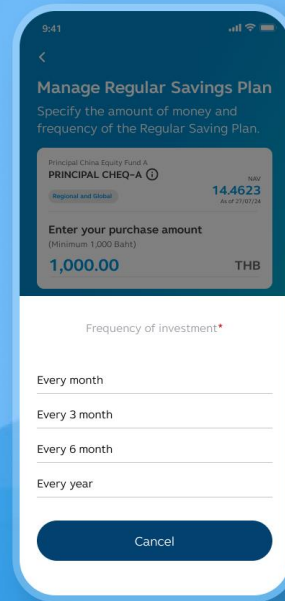
Steps for managing a regular savings plan (RSP)



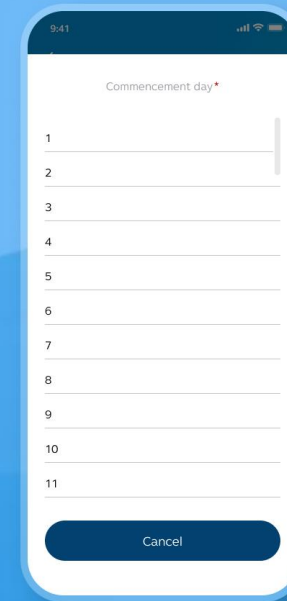
4. Select a fund



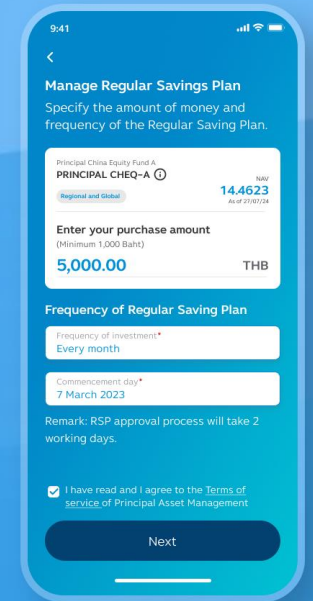
5. Specify the amount



6. Select investment frequency

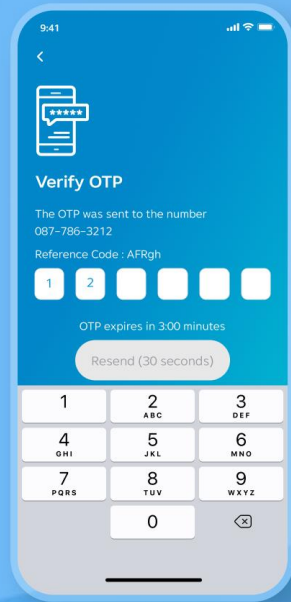


7. Select RSP start date

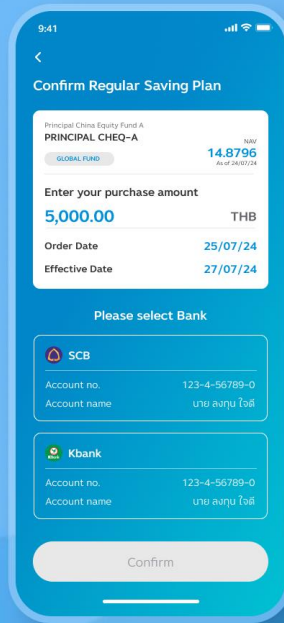


8. Next

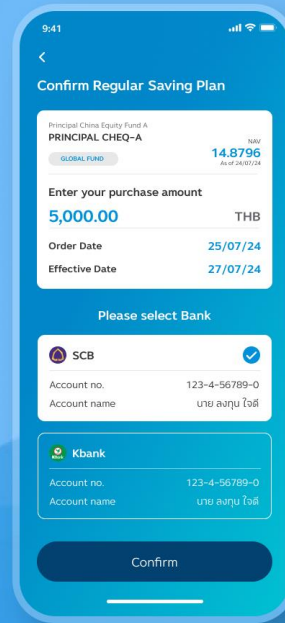
Steps for managing a regular savings plan (RSP)



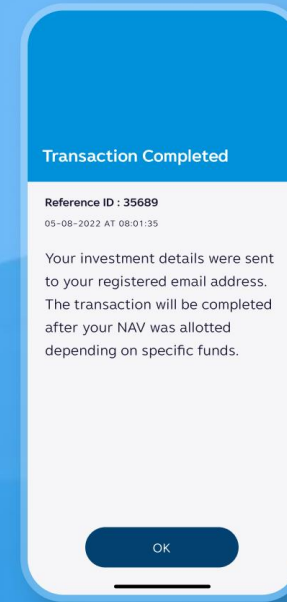
9. Confirm OTP



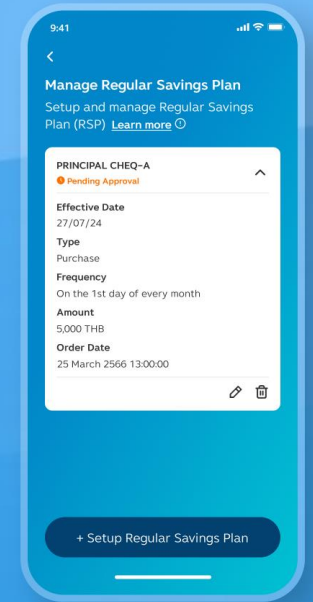
10. Select payment method



11. Confirm Regular Saving Plan

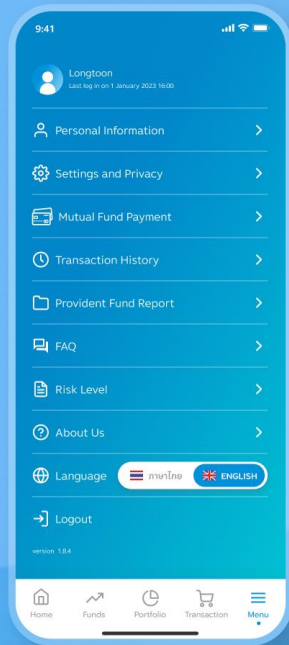


12. The transaction was completed successfully.

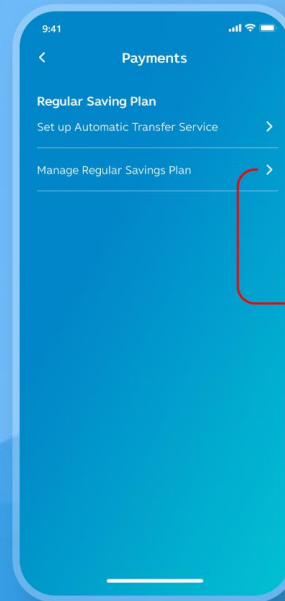


13. Plan management details Invest (Pending Approval)

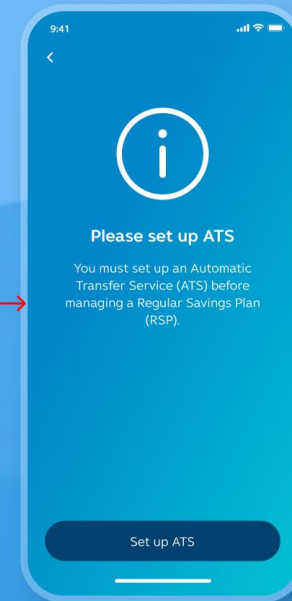
Steps for managing a regular savings plan (RSP) "In case there is no set up automatic transfer service"



14. Mutual fund payments



15. Select Manage Regular Savings Plan



“ Warning message ”
(In the case where the customer does not yet have an ATS)



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