

INVESTMENT BANK



19th JUNE 2020

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WE WILL BELIEVE SHORTLY

A live demonstration of the NCBA Online Trading platform.

Speaker: Samuel Gichohi
Date: Thursday, 18th June 2020
Time: 9:00am



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Samuel is the Head of Business Development in the Brokerage unit at NCBA Investment Bank, he previously served as the Business Development Manager and Senior Research Analyst at NIC Securities Ltd.

Samuel Holds an MSc. Finance degree from Strathclyde University, Glasgow, UK. and is a member of ICIFA. He built extensive knowledge and experience in the stock market as an analyst, trainer and business development expert over his 12 years in the industry.

Samuel is passionate about financial inclusion through market digitization and investor education.

SAMUEL GICHOHI
Business Development Manager
NCBA Investment Bank

Introduction



NCBA Online Share Trading (OST) is a web based application designed for clients registered under NCBA Investment Bank Stock Brokerage firm to trade through internet. NCBA OST provides real-time streaming quotes on the browser and allows the client manage their trading activities. Clients have real time access to various reports such as available fund, portfolio valuation, transaction statement and contracts. Application also allows the client to make payment requests online.

NCBA OST: <https://onlinetrading.ncbagroup.com/tradeweb/>

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Online Trading Requirements



- ✓ Have an active CDSC Account with NCBA Investment bank
- ✓ Have email indemnity in place
- ✓ Should have signed the online trading agreement and provided payment bank details

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Registration Process



Step 1: Client to open a CDSC Account at an NCBA Branch. Download the from the Investment Bank Start Trading Today section <https://investment-bank.ncbagroup.com/>

- Individuals – Download the Personal Account Opening Form
- Corporates – Download the Corporate Account Opening Form
- Groups/Couples – Download the Joint Account Opening Form

Step 2: Client to sign the NCBA Investment Bank Online Share Trading Agreement. Available on the website too.

Step 3: Go to the Online or Mobile account home page and select sign up. (Enter CDSC account number, ID Number and indemnified email, Enter the preferred user name, Accept terms and conditions.

Step 4: NCBA Stock Brokerage to email the client their credentials

Step 5: Client to login on <https://onlinetrading.ncbagroup.com/tradeweb/> and set a password.

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How to transfer funds



Clients may load their share trading account by:

1. M-Pesa Paybill 488522 indicating their CDSC Account number on the account section.
2. Funds transfer and/or Deposits can be made to bank account detail below and confirmation sent to brokeragebd@ncbagroup.com

Bank: NCBA Bank

Branch: City Centre

Account Name: NCBA Investment Bank

Account Number: 1000132604

Swift Code: CBAFKENX

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THANK YOU



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