



How to open a CDS account via the CSE Mobile App

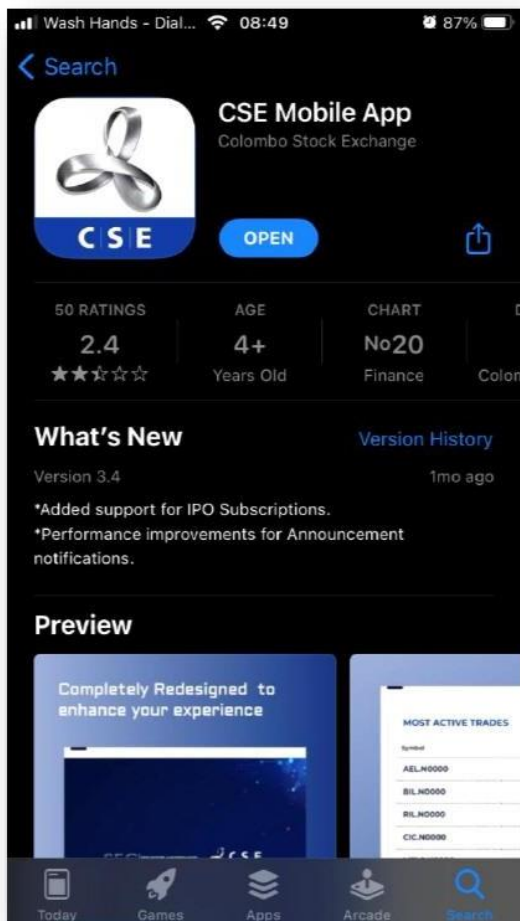
USER GUIDE

There are three main steps to follow to create a CDS account,

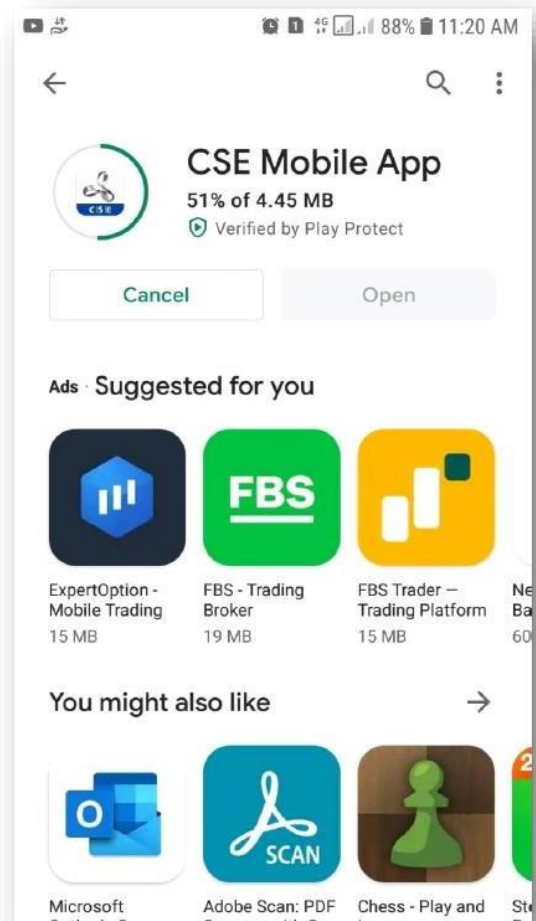
1. Download and install the CSE mobile App
2. Create CSE account
3. Open the CDS account

1. How to download the CSE mobile App?

Step 01 - Go to the App store (IPhones) or Play store (Android) of your mobile and search for the “CSE Mobile App”



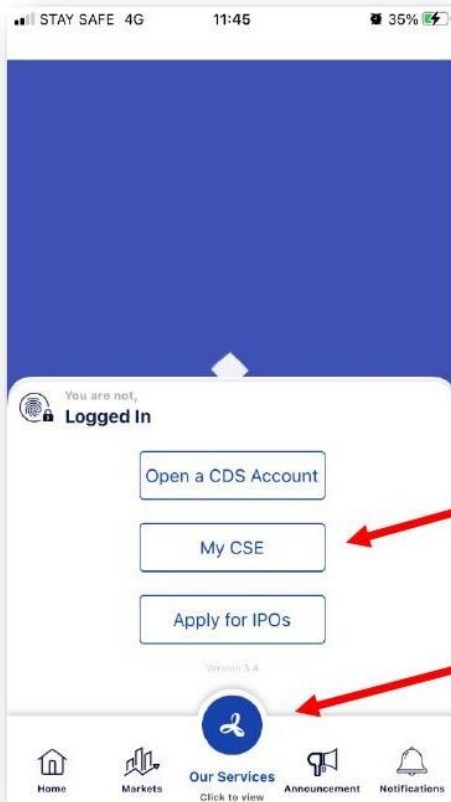
IPhone



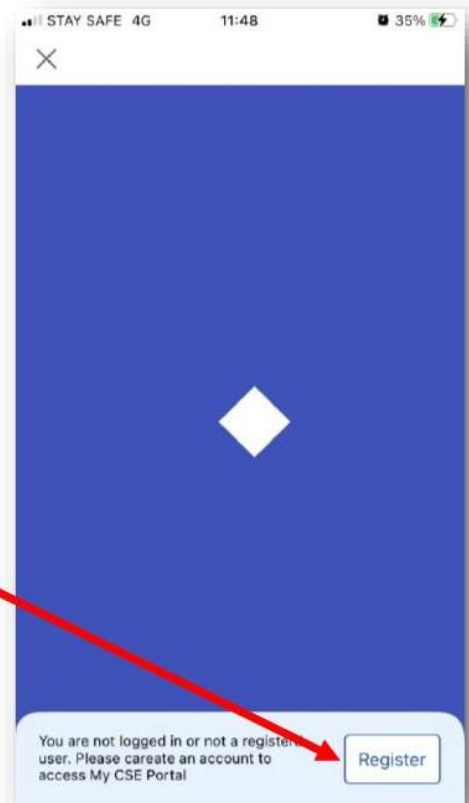
Android

Step 02 – Download and install the App to your mobile

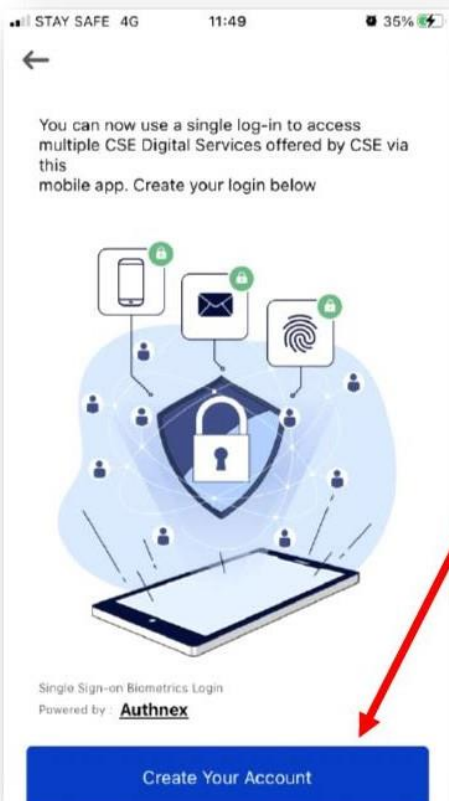
2. How to create the CSE account?



Step 01 – Open the CSE App and select “Our Services”, then select “My CSE”.



Step 02 – Select “Register”



Step 03 – Select “Create Your Account”

STAY SAFE 4G 11:49 35%

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My CSE

Your Email

Next

Step 04 – Enter your email address and click “Next”

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My CSE

Your Email

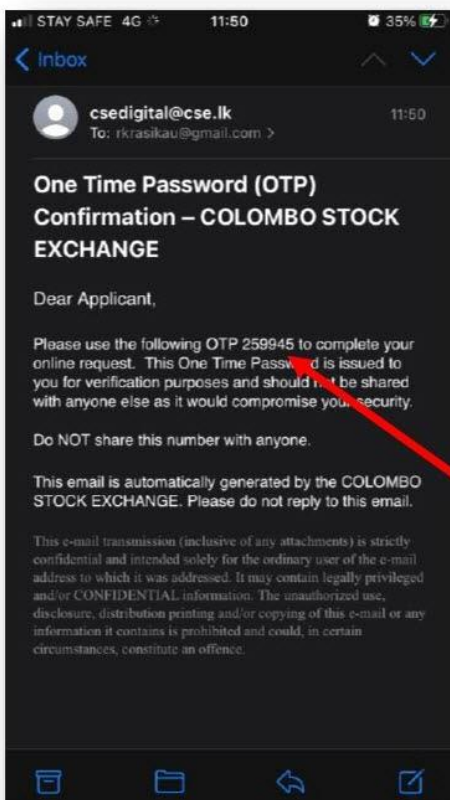
rkrsikau@gmail.com

Enter Password

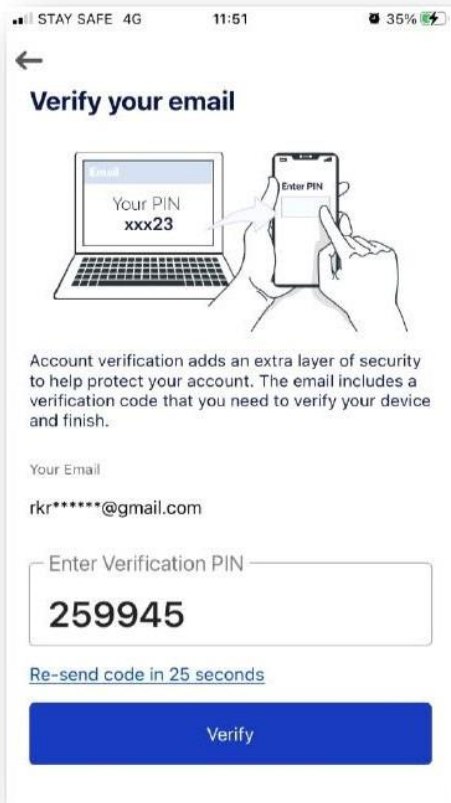
Forgot your password?

Next

Step 05 – Enter a password for your CSE account and click “Next”

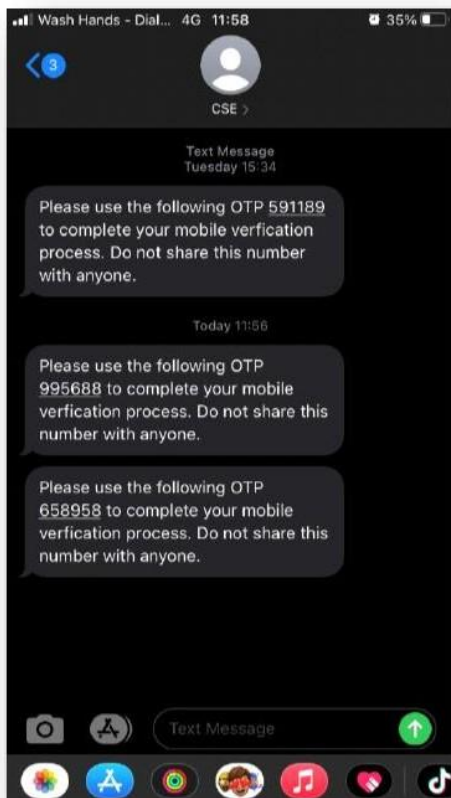
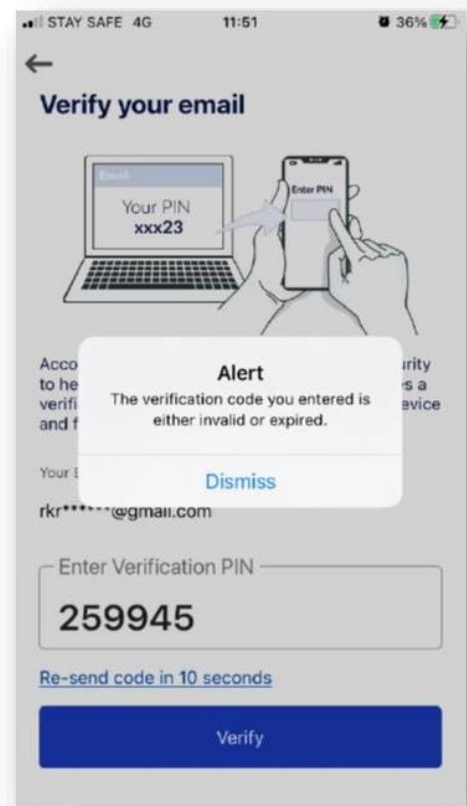


Step 06 – Check your email account for the OTP (One Time Password) to complete the next step.

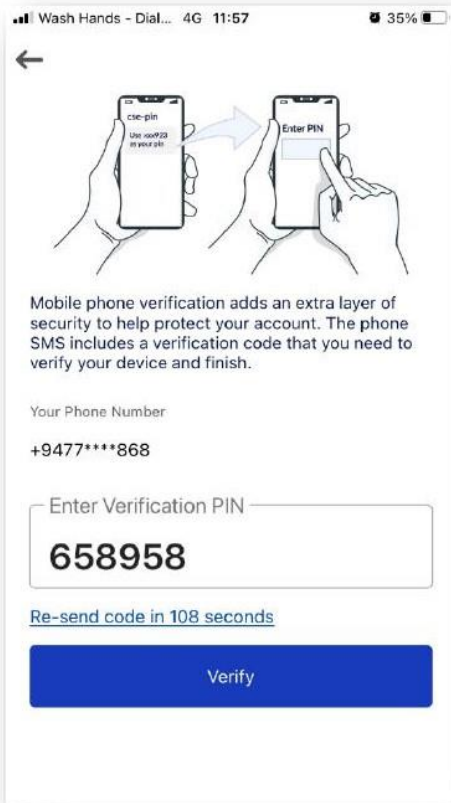


Step 07 – Enter the OTP and click “Verify”

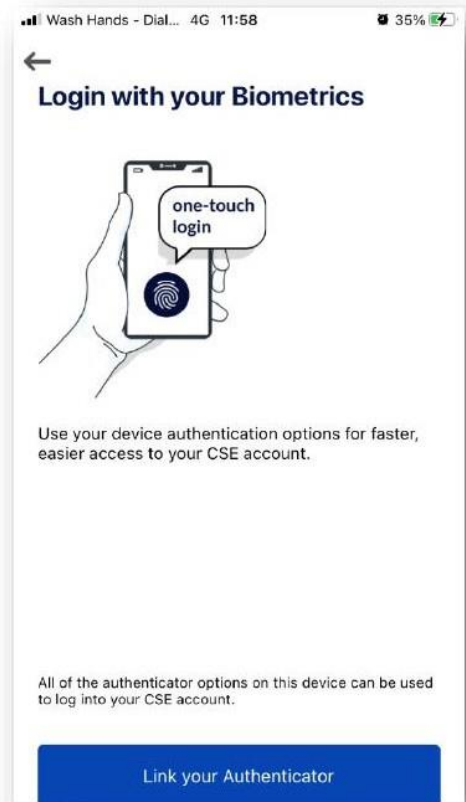
Step 08 – If you get this error message when verifying the OTP, wait for the countdown to complete and click the “Resend Code” button and repeat step 06 and 07.



Step 09 – Check your Mobile for the OTP for the mobile number verification.



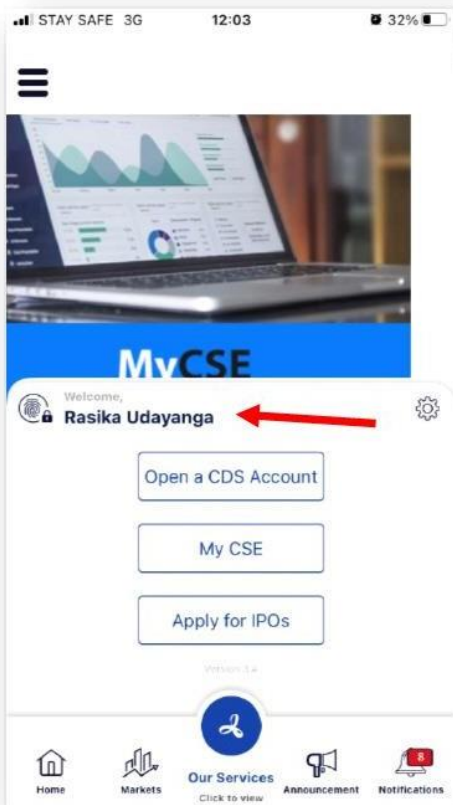
Step 10 – Enter the OTP received to your mobile via SMS and click “Verify”.



Step 11 – Click on “Link Your Authenticator” button.

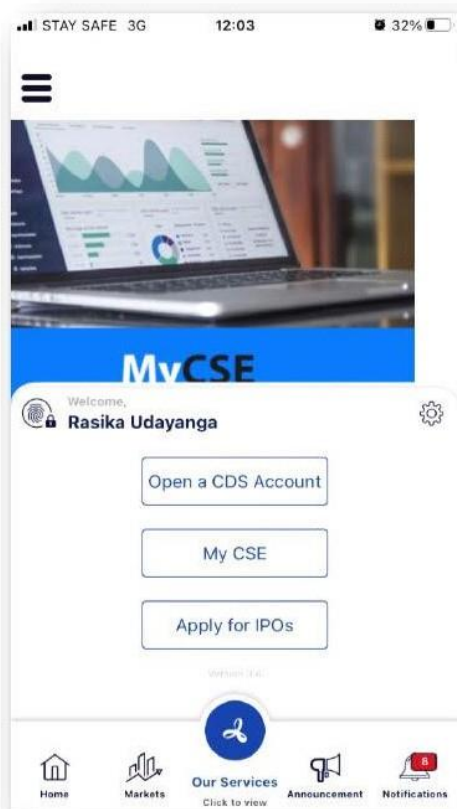


Step 12 – Select your authentication type and follow the steps to create an authenticator.



Step 13 – You have now created the CSE account. Check the top left corner of “Our Services” window for the account name.

3. How to open the CDS account?



Step 01 – Select the “Open CDS Account” option in “Our Services” window.

Step 02 – Enter your authenticator (touch id or the password).

The screenshot shows the 'ACCOUNT OPENING' form. At the top, there's a back arrow and the title 'ACCOUNT OPENING'. Below is a row of icons representing different services. The 'Personal Information' section includes fields for 'Title', 'Initials', 'Names Denoted by Initials', 'Surname', 'Mobile No', and 'Telephone'. Each field has a green checkmark indicating it's required or valid.

Step 03 – Fill your “Personal Information”



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ACCOUNT OPENING

Identification Proof

NIC

NIC No

123456789V OR 200123456789

Date of Birth

YYYY/MM/DD

Gender

☒ Male ☐ Female

Stock Broker Firm

HNB STOCKBROKERS (PVT) LTD

Investment Advisor

Select Invest Advisors(optional)

Do you have CDS Account

☐ Yes ☒ No

TIN No

OPTIONAL

You can reach us via the following contact details.
(Weekdays from 8.30am to 4.30pm)
CDS Support
Voice : (+94)112356444
Whatsapp : (+94)763139111

Step 04 – Select “ HNB STOCKBROKERS (PVT) LTD” as the Stock Broker Firm in personal information section.

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ACCOUNT OPENING

Residential Information

Residential address is the same as the address on my NIC
If selected “No” Please upload proof of residency under documents upload screen.

☐ Yes ☐ No

Status of Residential Address

Address Line 1

Address Line 2

Address Line 3

Step 05 – Fill “Residential information” and click on “Next” button

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ACCOUNT OPENING

Bank Account Details to Remit Dividends

Bank

7056-COMMERCIAL BANK OF CEYLON PLC

Branch

048-UNION PLACE

Account No

Reach us through cdsonlinehelp@cse.lk or connect with us
on (weekdays from 8.30am to 4.30pm)
Whatsapp : 0741766437, 0775241817, 0759740911,
0789044094, 0740449383.
Voice: 0112356455, 0112356450.

PREVIOUS NEXT

Step 06 – Enter your bank account details and click on “Next” button.

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ACCOUNT OPENING

Employment Information

Are you Employed

☒ Yes ☐ No ☐ Self Employed

Occupation

Name of Employer

Address of Employer

Office Phone No

Office Email

Step 07 – Enter your “Employment Information” and click on Next button

Step 08 – Select “Yes” if you are a “Politically Exposed Person” and click on Next button.

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ACCOUNT OPENING

Politically Exposed Persons (PEPs)

Are you a Politically Exposed Person?
(PEP is a person who has been entrusted with a prominent public function or related/connected to such a person)

☐ Yes ☒ No

Reach us through cdsonlinehelp@cse.lk or connect with us on (weekdays from 8.30am to 4.30pm)
Whatsapp : 0741766437, 0775241817, 0759740911, 0789044094, 0740449383
Voice: 0112356455, 0112356450.

PREVIOUS NEXT

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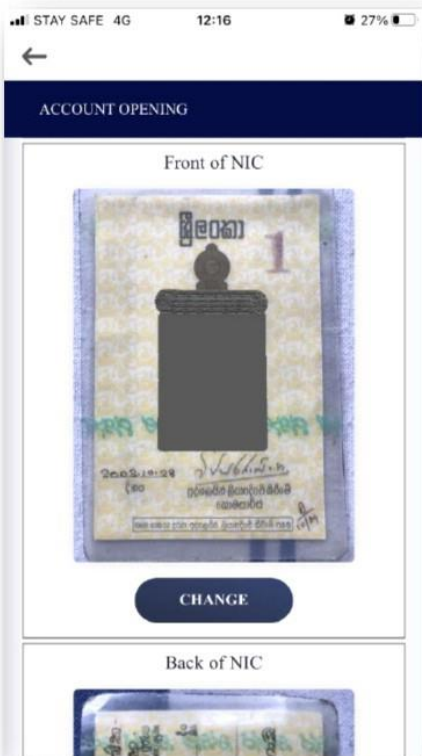
ACCOUNT OPENING

Documents Upload

Selfie

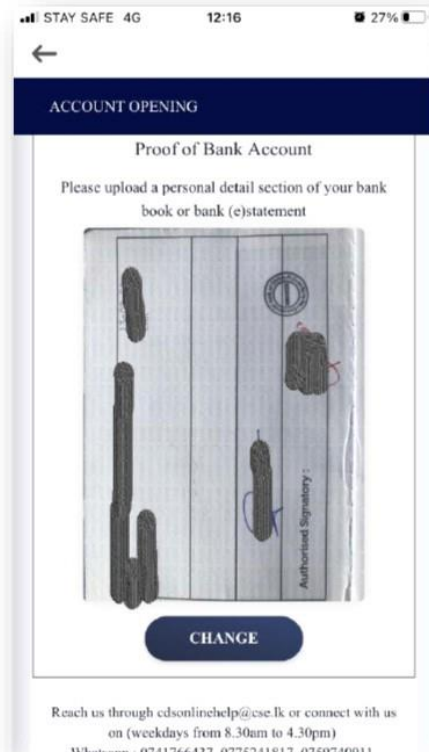
Kindly upload a selfie taken at the time of completing the application. It should be clear, in focus & in colour. Photo shouldn't contain any other objects or people. It should be a full-face & shoulder shot squarely facing the camera. Do not wear sunglasses or tinted glasses. You can wear other glasses if you need to, but your eyes must be visible without any glare or reflection

Step 09 – Upload a nice selfie of yours.

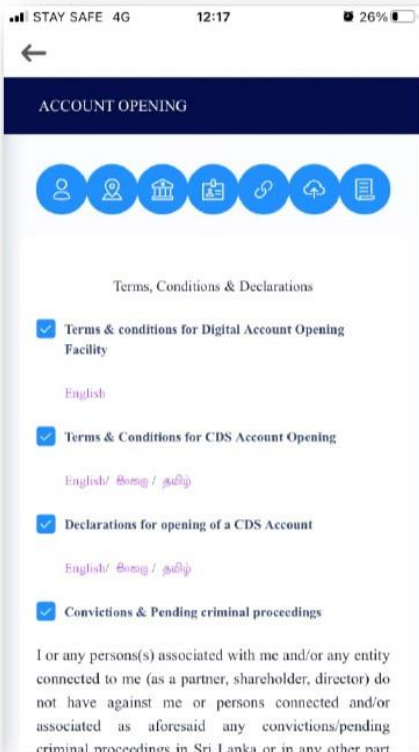


Step 10 – Take pictures of both sides of your NIC and upload.

Step 11 – Take a picture of your bank book/ bank statement.



Step 12 – Read the terms and conditions and click each check box.



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ACCOUNT OPENING

This Agreement will complete due execution and be legally binding

- upon explaining Risk Disclosure Statements contained in this Agreement to the Client by an authorized Officer of the Stockbroker Participant via telephone; and,
- upon completion of the requirements set out in Rule 2.3.5 read together with Annexure 3 to the CSE Stockbroker Rules.

Therefore, the Client will receive an email communication from the Stockbroker Participant for this purpose subsequent to opening the CDS Account digitally.

☒ Client Agreement [View](#)

Reach us through cdsonlinehelp@cse.lk or connect with us on (weekdays from 8.30am to 4.30pm)
 Whatsapp : 0741766437, 0775241817, 0759740911, 0789044094, 0740449383.
 Voice: 0112356455, 0112356450.

PREVIOUS I AGREE & DECLARE

Step 13 – Click on “I AGREE & DECLARE” button at the end of “Terms & Conditions page.”

Step 14 – Click on “Authorize” and enter your authenticator (Touch id or Password).

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ACCOUNT OPENING

You have successfully submitted the Online Application Form.
 Your stockbroker will get in touch with you soon.

OK

Mobile No
 0777289866

Telephone

Step 15 – Congratulations! You have successfully submitted the online application form.

STAY SAFE 4G 12:17 26%

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ACCOUNT OPENING

This Agreement will complete due execution and be legally binding

- upon explaining Risk Disclosure Statements contained in this Agreement to the Client by an authorized Officer of the Stockbroker Participant via telephone; and,
- upon completion of the requirements set out in Rule 2.3.5 read together with Annexure 3 to the CSE

Authentication is required
 Please Digitally Authorize the Online CDS Account Opening Form

Cancel Authorize

Reach us through cdsonlinehelp@cse.lk or connect with us on (weekdays from 8.30am to 4.30pm)
 Whatsapp : 0741766437, 0775241817, 0759740911, 0789044094, 0740449383.
 Voice: 0112356455, 0112356450.

PREVIOUS I AGREE & DECLARE

After completion and submission of CDS form, the CDS and stockbroking firm will proceed on opening your account. An email will be sent with the confirmation of the account opening.

It will take 2 to 3 working days to open a CDS account, due to the prevailing situation.

Thank you for choosing HNB Stockbrokers!