

Investor Portal User Manual

How to open an account, buy units, start an SIP, and redeem your investment

EDGE AMC LIMITED

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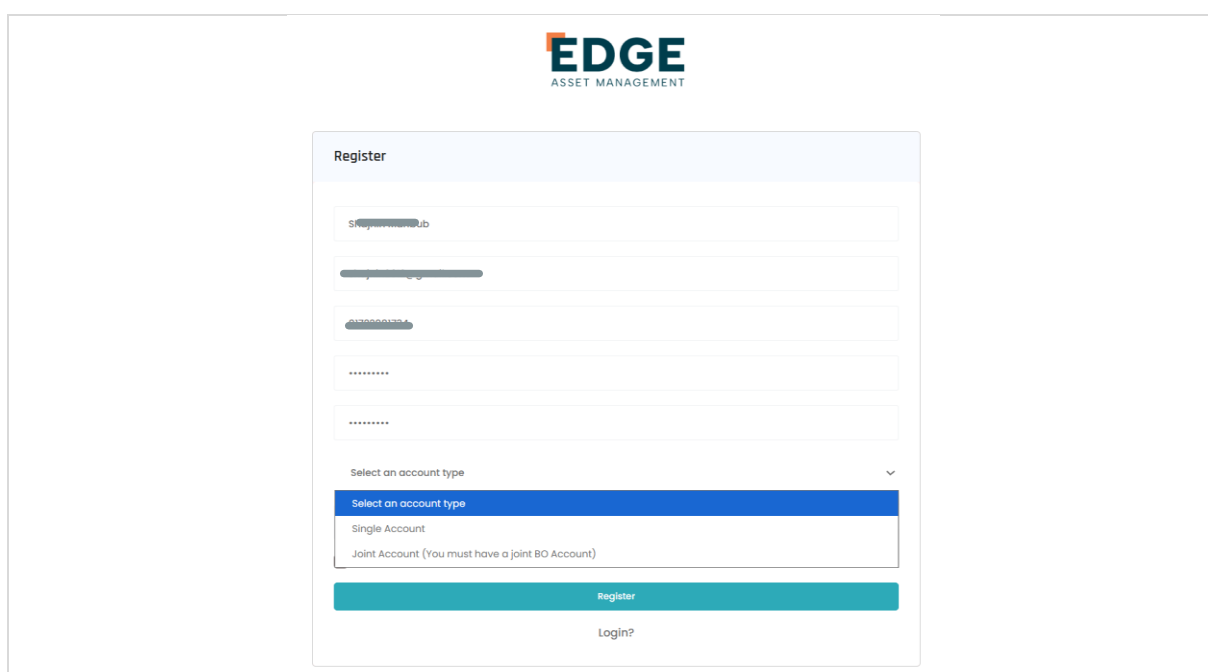
1. Account Opening Process

New investors begin at the EDGE Investor Portal. The process below walks through registration, identity verification, nominee details, and bank information — the full path to an approved, ready-to-invest account.

STEP 1

Register on the EDGE Investor Portal

Go to the EDGE Investor Portal (edgeamc.app/register) and register using your email address and a password.



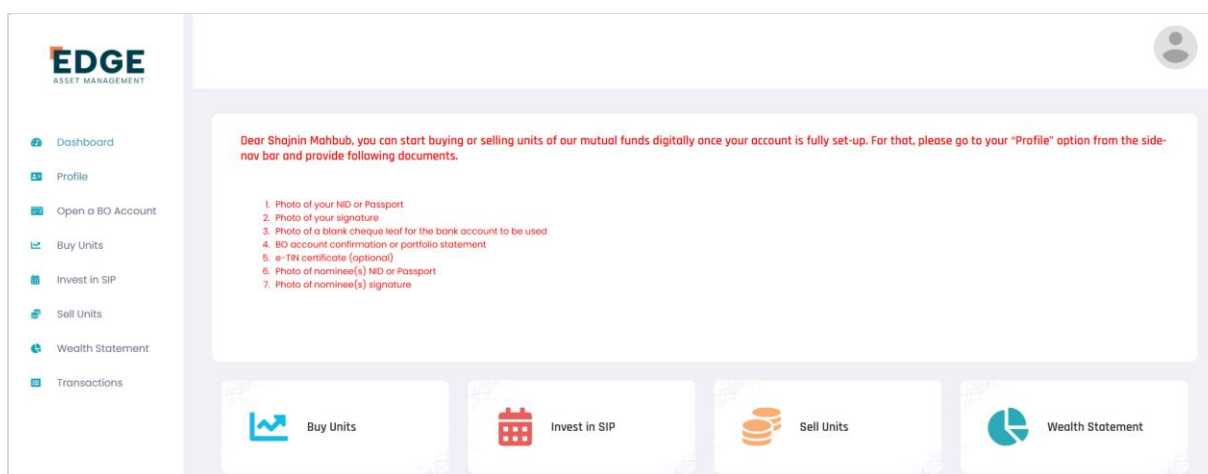
The screenshot shows the registration form on the EDGE Investor Portal. The form is titled "Register" and includes the following fields and options:

- First Name (text input)
- Last Name (text input)
- Email Address (text input)
- Password (text input with asterisks)
- Confirm Password (text input with asterisks)
- Account Type Selection: A dropdown menu labeled "Select an account type" with two options: "Single Account" and "Joint Account (You must have a joint BO Account)".
- Register button (blue)
- Login? link (text)

STEP 2

Start your profile

Select the Profile option to begin editing your investor profile.



The screenshot shows the dashboard of the EDGE Investor Portal. The dashboard includes a sidebar with navigation options and a main content area with a message and a list of documents to be provided.

Navigation Sidebar:

- Dashboard
- Profile
- Open a BO Account
- Buy Units
- Invest in SIP
- Sell Units
- Wealth Statement
- Transactions

Main Content Area:

Dear Shajnin Mahbub, you can start buying or selling units of our mutual funds digitally once your account is fully set-up. For that, please go to your "Profile" option from the side-nav bar and provide following documents.

1. Photo of your NID or Passport
2. Photo of your signature
3. Photo of a blank cheque leaf for the bank account to be used
4. BO account confirmation or portfolio statement
5. e-TIR certificate (optional)
6. Photo of nominee(s) NID or Passport
7. Photo of nominee(s) signature

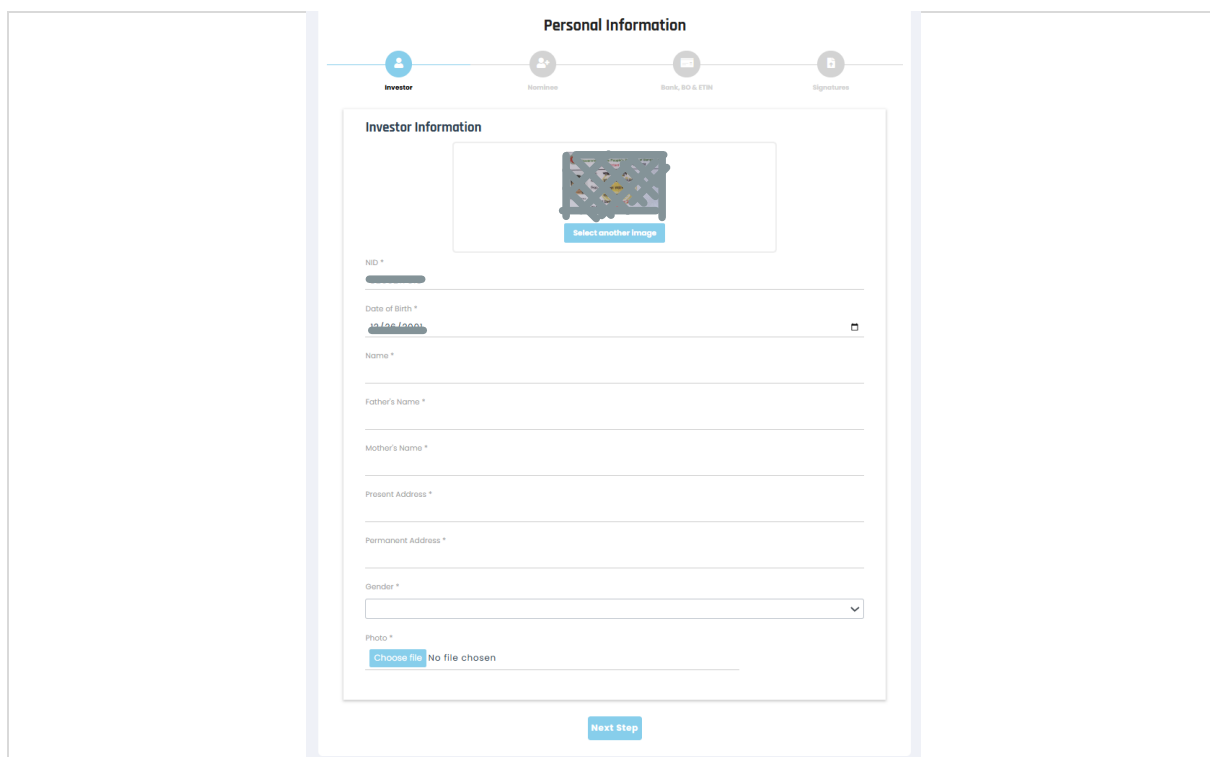
Bottom Action Bar:

- Buy Units
- Invest in SIP
- Sell Units
- Wealth Statement

STEP 3

Verify your identity

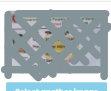
1. Click Open with NID or Open with Passport, based on the document available to you.
2. Upload the NID or passport.
3. Enter the requested details and click Next Step.



Personal Information

Investor Nominee Bank, SO & ETN Signature

Investor Information


Select another image

NID *

Date of Birth *

Name *

Father's Name *

Mother's Name *

Present Address *

Permanent Address *

Gender *

Photo *

Choose file No file chosen

Next Step

STEP 4

Add nominee information

Next, provide nominee details for the account.

1. Upload the nominee's NID or passport.
2. Enter the nominee's details.
3. Click Next Step, or Proceed with Second Nominee to add another nominee.

First Nominee Information



Select another image

NID *

Date of Birth *

Name *

Present Address *

Permanent Address *

Relation *

Mobile

Email

Gender *

Male

Photo

Choose file

.jpeg



Previous

Next Step

Next step with second nominee?

STEP 5

Add bank and BO account details

Provide bank account details, BO account details, and e-TIN (optional) along with the supporting documents, then click Next Step. Finally, upload the nominee's and applicant's signatures and click Confirm.

Personal Information

Investor

Nominee

Bank, BO & ETIN

Signatures

Bank, BO & ETIN

Upload a Blank Cheque or Bank Statement (JPEG, JPG, PNG, PDF) *

Choose file

No file chosen

BO Confirmation/ Portfolio Statement (JPEG, JPG, PNG, PDF)

Choose file

No file chosen

Upload your e-TIN (JPEG, JPG, PNG, PDF)

Choose file

No file chosen

Previous

Next Step

Personal Information

Investor

Nominee

Bank, BO & ETIN

Signatures

Primary Account

Signature*

Choose file

.jpeg

Nominee

Signature

Choose file

.jpeg

☒

I confirm that the information provided is correct and I take responsibility for any mistakes.

Previous

Confirm

CONFIRMATION

A confirmation message appears once the account opening process is complete. Click OK. You will also receive a text message on your registered mobile number and an email on your registered email address.

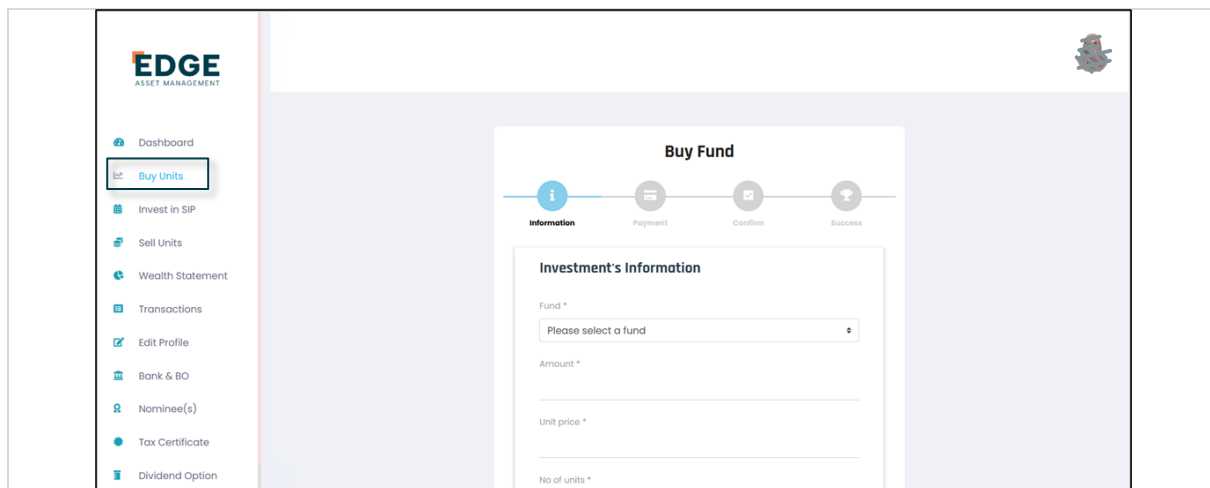
2. Placing a Buy Request (Lump-sum)

Once an account is approved, investors can place a lump-sum purchase request directly through the portal in three straightforward steps.

STEP 1

Select Buy Units

Log in to the EDGE Investor Portal and select Buy Units from the sidebar.

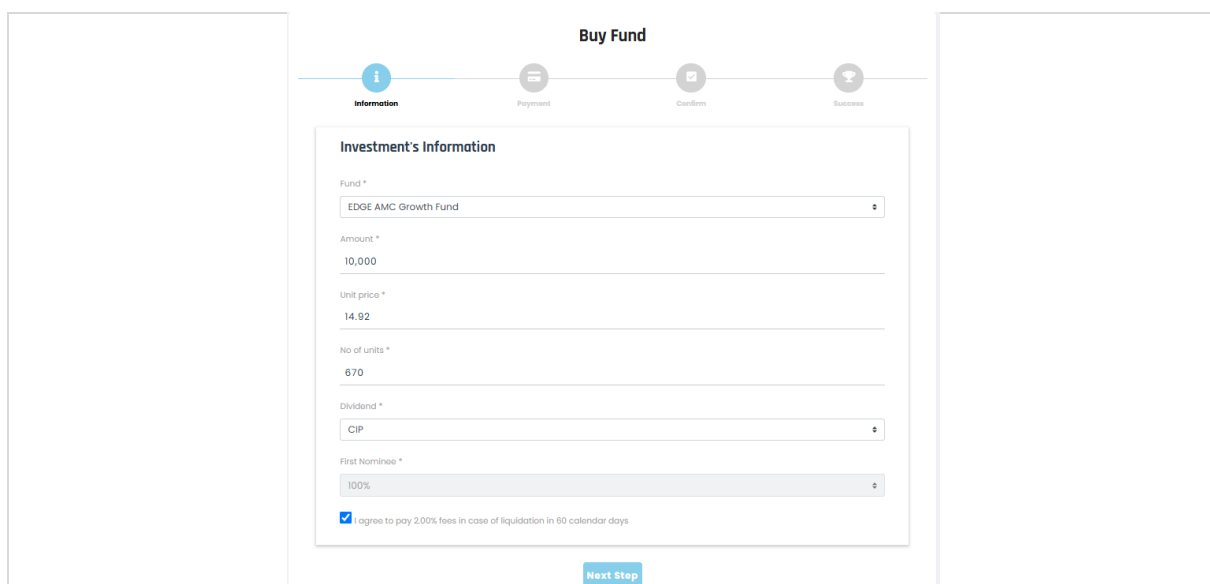


STEP 2

Enter investment details

Select the mutual fund, then:

1. Enter the investment amount.
2. Review the displayed unit price and estimated number of units.
3. Complete any additional fields shown on the screen.
4. Select Next Step.



STEP 3

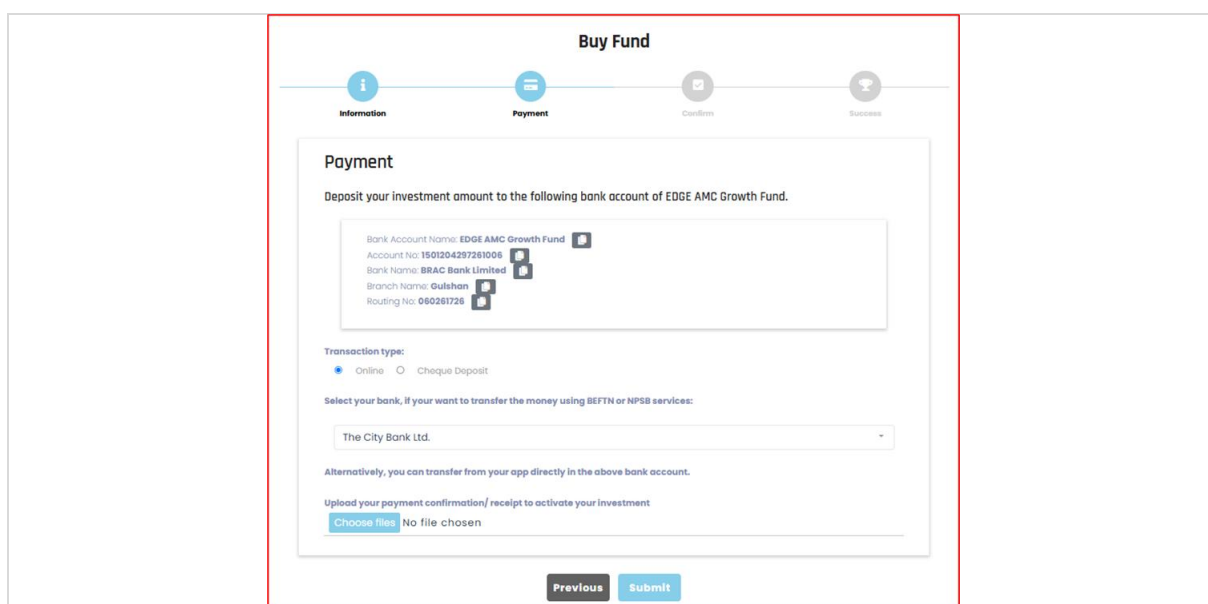
Make the payment

The fund's bank account details appear under the Payment section. Payment may be made by:

- Online bank transfer
- Cheque deposit

After making the payment:

1. Select the relevant transaction type.
2. Upload the payment receipt.
3. Review the information.
4. Select Submit.



Buy Fund

Information
Payment
Confirm
Success

Payment

Deposit your investment amount to the following bank account of EDGE AMC Growth Fund.

Bank Account Name: EDGE AMC Growth Fund

Account No: 1501204297261006

Bank Name: BRAC Bank Limited

Branch Name: Gulshan

Routing No: 060261726

Transaction type:

☒ Online
 ☐ Cheque Deposit

Select your bank, if you want to transfer the money using BEFTN or NPSB services:

The City Bank Ltd.

Alternatively, you can transfer from your app directly in the above bank account.

Upload your payment confirmation/ receipt to activate your investment

Choose files

No file chosen

Previous

Submit

Bank Details of All Four EDGE Mutual Funds

EDGE Bangladesh Mutual Fund Account Name: EDGE BANGLADESH MUTUAL FUND Account Number: 00081060000050 Bank Name: Midland Bank PLC Branch Name: Dhanmondi Routing Number: 285261185	EDGE AMC Growth Fund Account Name: EDGE AMC Growth Fund Account Number: 00081060000078 Bank Name: Midland Bank PLC Branch Name: Dhanmondi Routing Number: 285261185
EDGE High Quality Income Fund Account Name: EDGE High Quality Income Fund Account Number: 00081060000130 Bank Name: Midland Bank PLC Branch Name: Dhanmondi Routing Number: 285261185	EDGE Al-Amin Shariah Consumer Fund Account Name: EDGE Al-Amin Shariah Consumer Fund Account Number: 400313100001695 Bank Name: Shahjalal Islami Bank Limited Branch Name: Dhanmondi Routing Number: 190261188

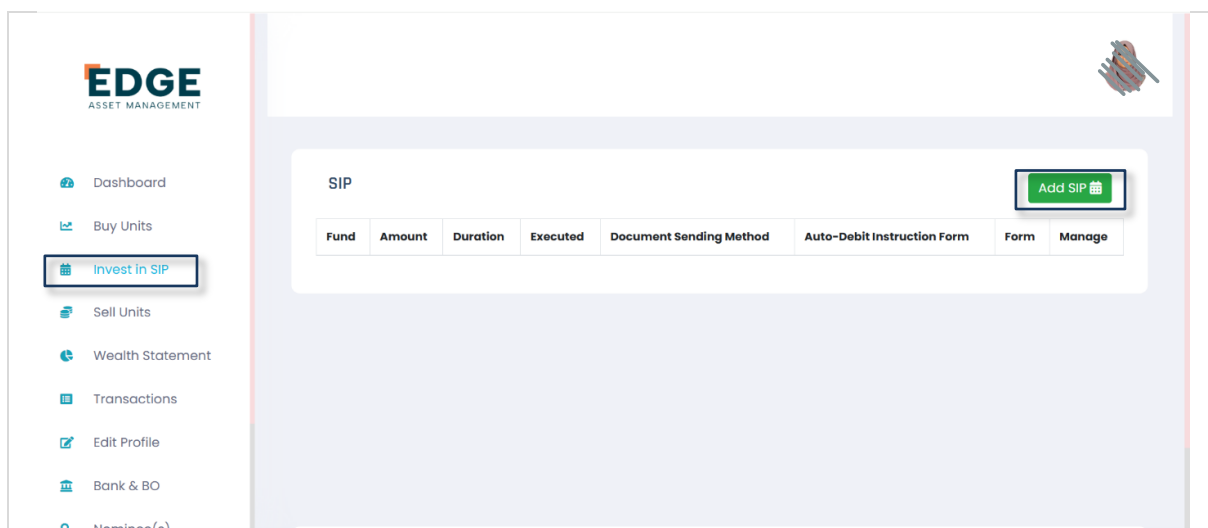
3. Starting a Systematic Investment Plan (SIP)

A Systematic Investment Plan lets investors commit to a fixed monthly amount, automating disciplined, long-term investing.

STEP 1

Select Invest in SIP

From the Investor Portal sidebar, select Invest in SIP, then select Add SIP.

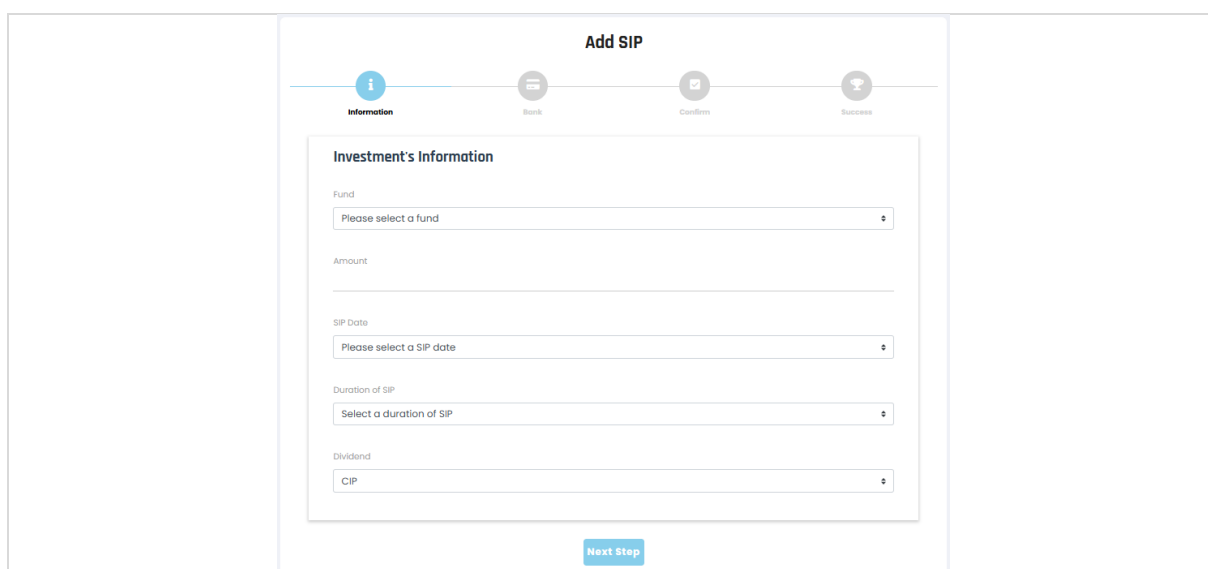


STEP 2

Enter SIP details

Enter or select the following, then press Next:

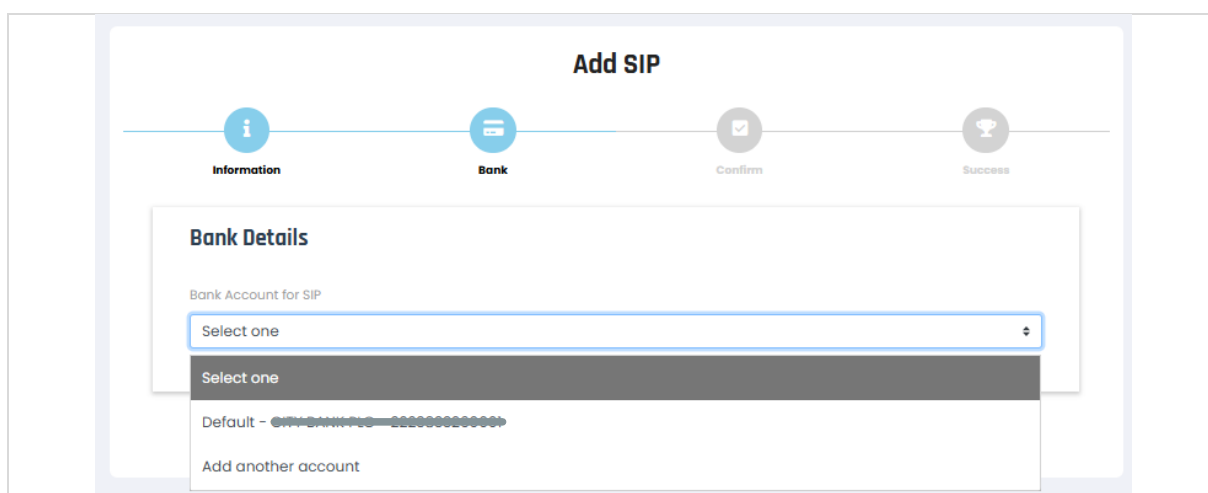
- Fund
- Monthly investment amount
- SIP date
- SIP duration
- Dividend option



STEP 3

Select a bank account

The investor may either select an existing bank account already registered in the investor profile, or add a new one. When adding a new account, upload either a bank statement or a clear image of a cheque leaf.



After providing the bank details, click Confirm to place the SIP request.

4. Placing a Sell (Redemption) Request

Redeeming units involves a coordinated handoff between the investor, the brokerage house, and EDGE AMC. The steps below cover the full process, from initiating the request to receiving proceeds.

STEP 1

Select Sell Units

Log in to the portal and select Sell Units from the sidebar.

STEP 2

Choose the fund to redeem

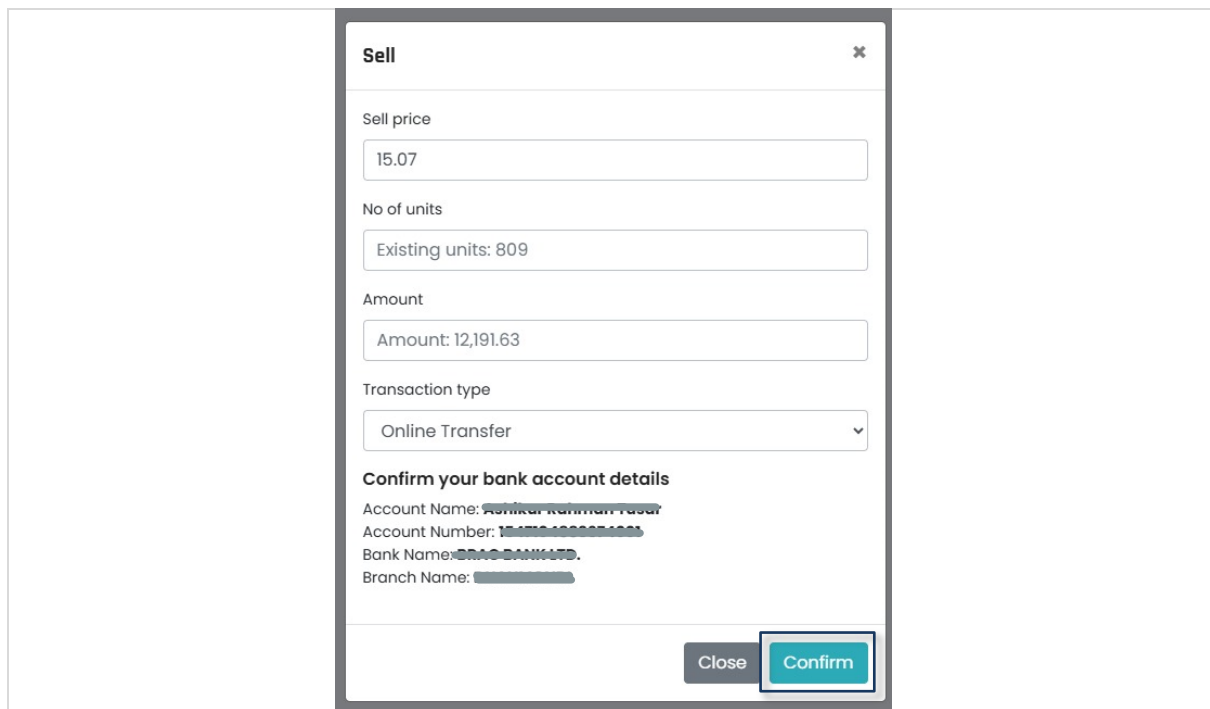
The portal displays the funds currently held by the investor. Select Sell beside the fund from which units will be redeemed.

STEP 3

Confirm the redemption details

1. Enter the requested number of redemption units.
2. Review the displayed sell price.

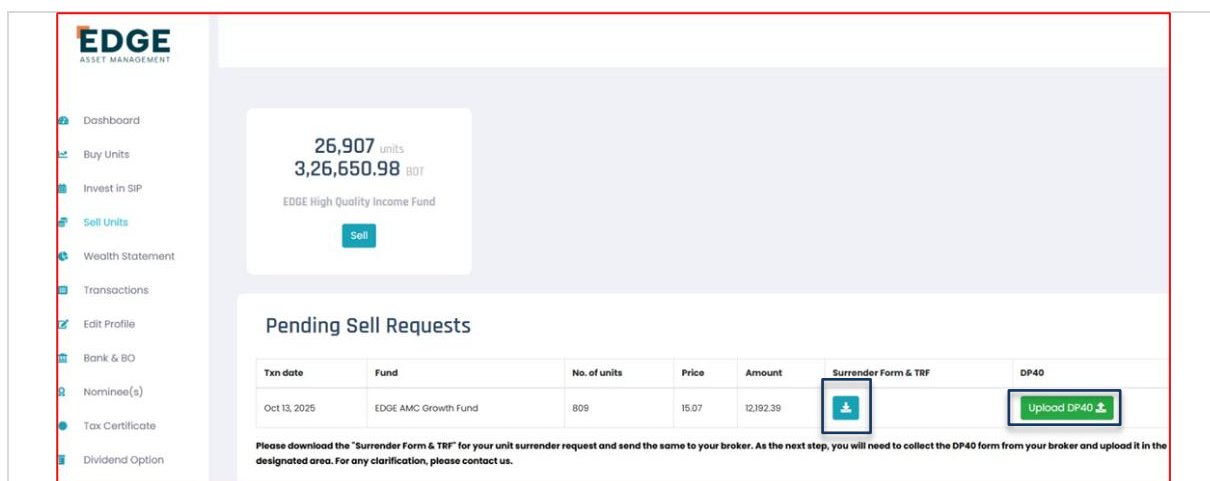
3. Confirm the receiving bank account.
4. Select the preferred payment method.
5. Select Confirm.



STEP 4

Download the required documents

1. Download the Surrender Form and the Transfer Request Form (TRF).
2. Submit the Transfer Request Form to the brokerage house.
3. The brokerage house transfers the units from the investor's BO account to EDGE AMC's BO account and uploads the transfer information to the CDBL system.
4. Return to the pending redemption request in the EDGE portal and upload the DP40 document.
5. Once EDGE verifies the unit transfer and documents, proceeds are transferred to the investor through the selected payment method.



Txn date	Fund	No. of units	Price	Amount	Surrender Form & TRF	DP40
Oct 13, 2025	EDGE AMC Growth Fund	809	15.07	12,192.39		

Please download the "Surrender Form & TRF" for your unit surrender request and send the same to your broker. As the next step, you will need to collect the DP40 form from your broker and upload it in the designated area. For any clarification, please contact us.

IMPORTANT

After completing the unit transfer, the brokerage house provides the DP40 document to the investor. This document must be uploaded to the portal before proceeds can be released.