

Frequently Asked Questions (FAQs)

1. Overview

a. What is NEERA Invest?

NEERA Invest is an integrated investment proposition for NEERA women customers, offering access to multiple investment vehicles through one point of contact: Prime Bank Wealth Management.

b. Who manages the Customer Relationship?

Prime Bank Wealth Management assesses customers' investment needs, provides wealth planning and portfolio diversification and coordinates with the relevant departments and subsidiaries.

2. What are the Investment Solutions Offered?

- Fixed income: Government Treasury Bills (T-Bills), Treasury Bonds (T-Bonds), Sukuk and Corporate Bonds through Prime Bank PLC.
- Capital market investments through Prime Bank Investment Limited (PBIL) and Prime Bank Securities Limited (PBSL).
- BO Account opening through MyPrime apps and self-trading with TradeX apps.
- BPID opening through MyPrime.
- Access to Shariah-compliant investment solutions.

3. What are the Exclusive Benefits Included?

- Personalized wealth planning and portfolio diversification and tax investment management
- Dedicated Wealth Relationship Manager and investment query hotline.
- Free stock market knowledge sharing from PBIL and PBSL.
- Margin loans at preferential rates.
- Discounted trade commission through PBSL.
- Complimentary BPID opening, with waiver of BO Account opening, auction and transaction charges.*

* All benefits are subject to applicable eligibility criteria, terms and conditions.

4. What are the specific responsibilities of Each Department?

Department / Entity	Responsibility
NEERA – Women Banking	Promote the proposition, engage customers and facilitate branch referrals.
Prime Bank Wealth Management	Primary point of contact; investment needs assessment, wealth advisory and coordination. Easing of T-Bills, T-Bonds, Sukuk and Corporate Bonds investments. BPID opening through MyPrime apps
PBIL	Discretionary Portfolio Management (DPM) Services and discounted management fees within its applicable scope.
PBSL	Premium Brokerage services, BO Account opening through Myprime apps, self-trading with TradeX apps and stock market knowledge sharings, within its applicable scope.

5. What are the steps in the Customer Journey?

NEERA Customer → Wealth Management → Investment Needs Assessment → Relevant Department / Subsidiary → Investment Execution → Ongoing Advisory

6. Who should branch contact for Detailed Investment related queries?

For product details, eligibility, documentation, charges and processes, branches should contact the designated investment-team representatives.

Contact Person	Designation / Department	Mobile Number
Faria Khan Pinash **(Primary Hotline Number)**	Executive Officer, Wealth Management	**+8801760505649**
Enam Ahmed Hasan	Assistant Vice President, Wealth Management	+8801712329983
Md Mahmudur Rahman	Assistant Vice President, Wealth Management	+8801700707606

7. Important Information

Are investment Returns Guaranteed?

No guaranteed returns are specified under this proposition. Returns and risks vary by product. Customers should review applicable terms and risks before investing.

Where can customers Access the Service?

Customers can approach their NEERA branch or designated Wealth Relationship Manager for referrals and investment support.