

**Africa And Middle East Depositories
Association**

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CSD Investor Services

Value-added investor services provided by
Central Securities Depositories

2024, May 2nd

A decorative graphic in the bottom right corner consisting of three overlapping, rounded rectangular shapes in shades of teal.

39th AMEDA Meeting 2024

Agenda

Date: Thursday, 2nd May 2024

Speaker: Miguel Espinoza

Topics:

Overview

Investor Services

Important Considerations

CSD as Financial Market Infrastructure



Factors

Why CSDs provide investor services?

Modernization

New technologies and devices allows investors to have real-time access their portfolio



Remote Access

Geographic limitations and the pandemic pushed for remote and paper-less interaction



Business Diversification

Investor services is one of the available options for CSDs for business diversification



Economies of Scale

CSD can provide a centralized solution that can benefit the whole market



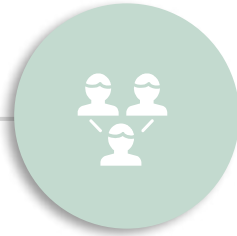
Investor Services

Investor Portal



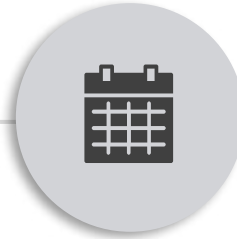
Account statement, transactions, market information

Account Management



Client onboarding, KYC and account opening

General Meetings



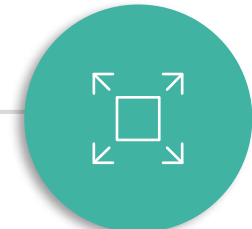
General meeting participation, voting, proxy

Instruction Placement



Bidding, secondary market (Pledges, OTC)

Other Services



Crowdfunding, tax services, digital signature, gas emissions, etc.

Important Considerations

Each market is different and has its own needs

Participant response is expected

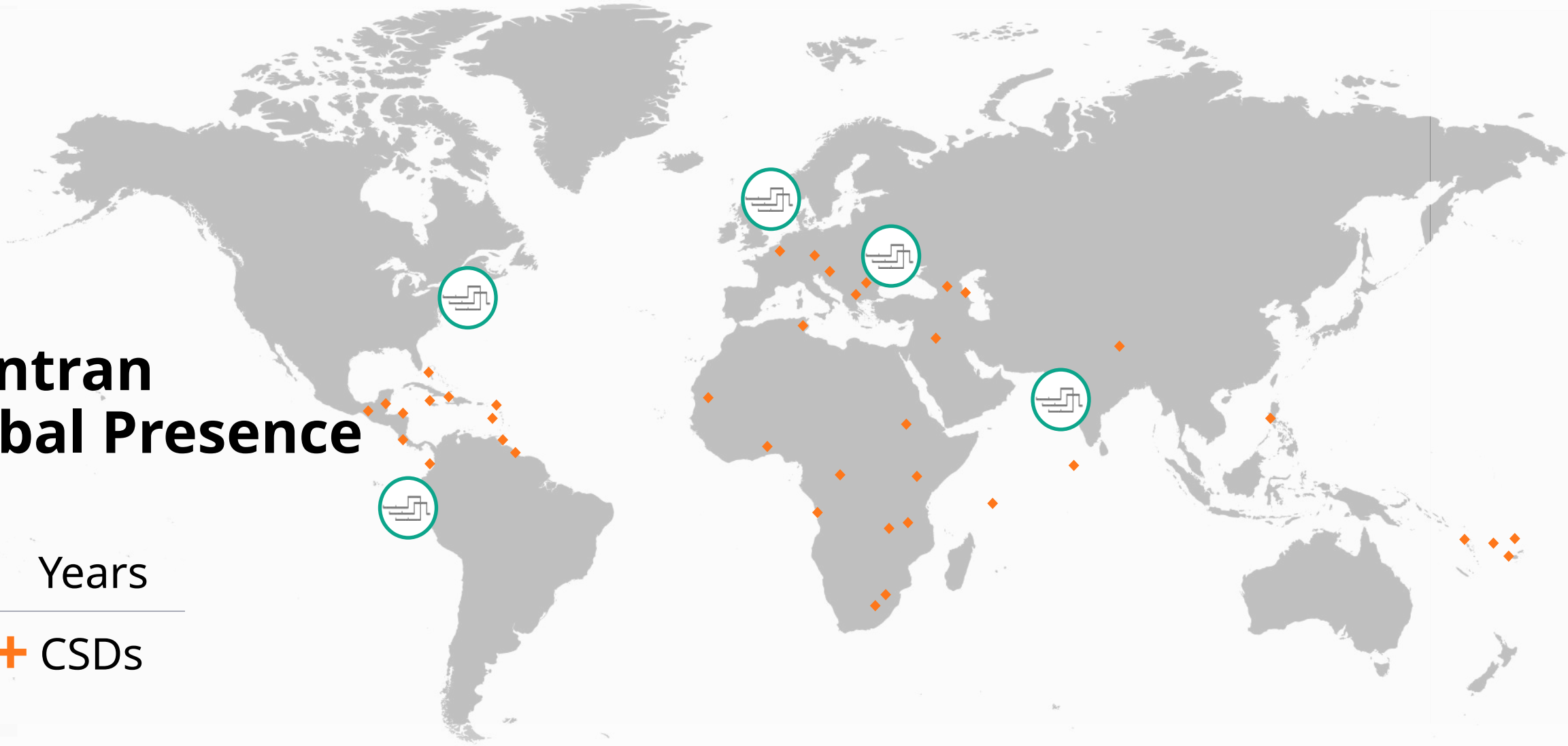
Help desk and customer support

Technical implications

Montran Global Presence

45 Years

40+ CSDs





Thank you!

Continue the dialog with us.

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