



Ramsey Crookall RC Axis User Guide



RC Axis User Guide

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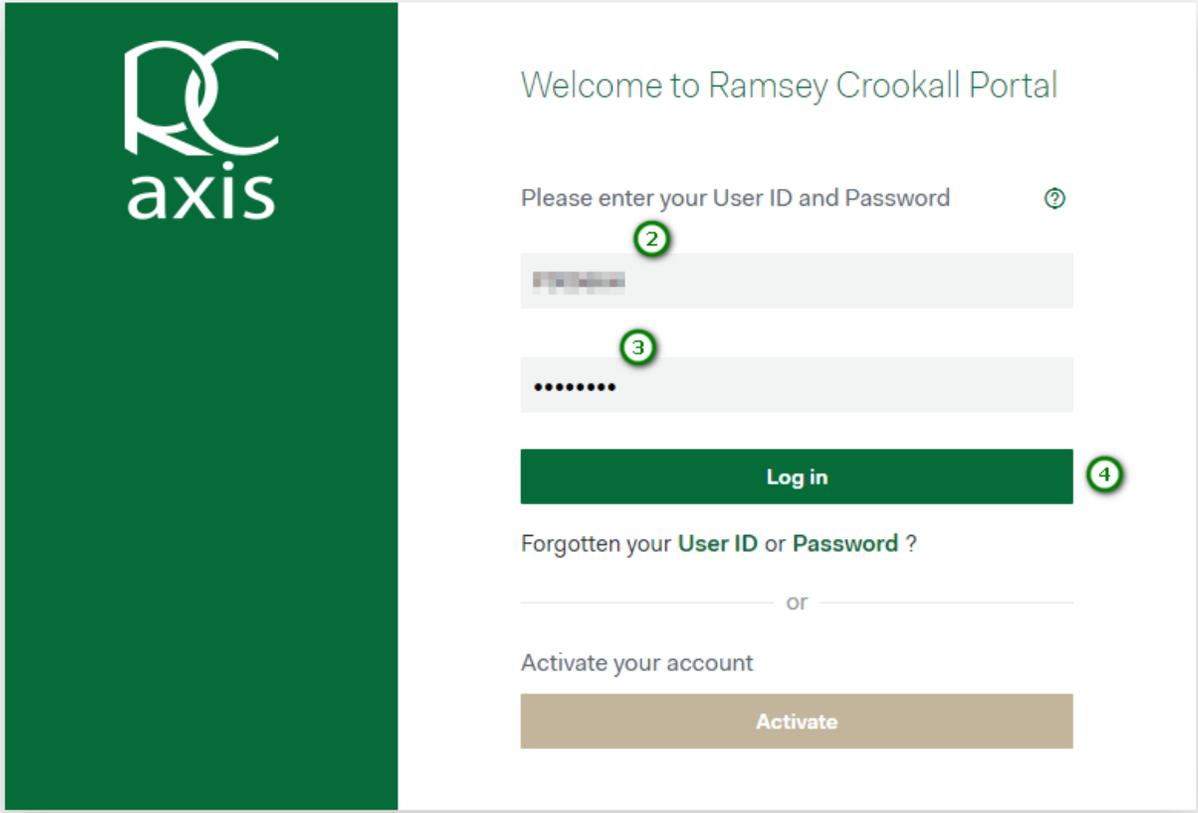
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Logging into RC Axis on your desktop



- Step 1: Go to the RC Axis sign in page
- Step 2: Enter your username
- Step 3: Enter your password
- Step 4: Click 'Log in'

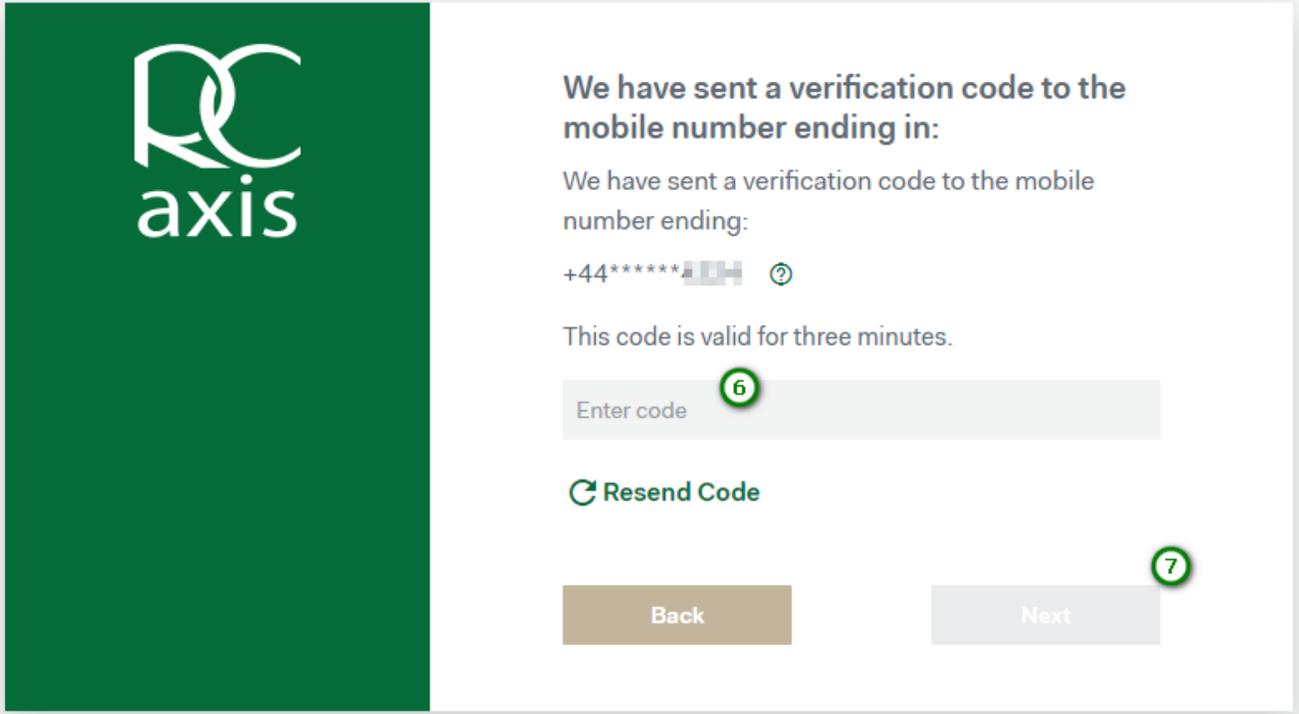


Step 5: RC Axis includes Multi Factor Authentication, so a text will be sent to your registered mobile number with a code you will need to use to login

Step 6: Enter the code

Step 7: Click 'Next'

The code is valid for three minutes, therefore if you find that the code has expired, you can use the 'Resend Code' icon to regenerate the code.



We have sent a verification code to the mobile number ending in:

We have sent a verification code to the mobile number ending in:
+44*****[redacted] ⓘ

This code is valid for three minutes.

Enter code **6**

[Resend Code](#)

[Back](#) [Next](#) **7**

RC Axis User Guide

My dashboard



The first page that you are brought to is, 'My dashboard'.

1. By clicking on 'My Portfolio' you will be taken to the 'Overview' tab
2. By clicking on 'Secure Inbox' you will be taken to your secure inbox where you can contact Ramsey Crookall
3. By clicking on 'My Documents' you will be taken to your documents page where you can view and upload documents relating to your portfolio
4. The three boxes at the top of the screen display information about your portfolio documents, clicking any of these will take you to your documents page
5. You will see on the left side of the screen the last five transactions on your portfolio – clicking on 'Show all transactions' will take you to your transactions tab
6. On the right side of the screen, you also have a portfolio summary – clicking anywhere on the summary will take you to your holdings tab
7. By clicking 'Get in touch' you will be able to view who your contact at Ramsey Crookall is

1 My Portfolio **2** Secure Inbox **3** My Documents

My dashboard

RC Axis Company Limited

4

3 NEW DOCUMENTS
Unread documents in your inbox

2 YOUR FAVORITE DOCUMENTS
Saved documents in your inbox

5 TOTAL DOCUMENTS
Documents in your inbox

LAST TRANSACTIONS

2024

19 Nov	Security Movement BP ORD USD0.25	10,000.00
19 Nov	Cash Movement Dealing	-38,905.05 GBP
4 Oct	Security Movement PERSONAL ASSETS TRUST PLC GBP0.125	0.00
4 Oct	Cash Movement Income	1,843.34 GBP
30 Sep	Cash Movement Income	205.29 GBP

6

PORTFOLIO SUMMARY

TOTAL
23,279,710.26
GBP

UNIT TRUSTS & OEICs	4,118,679.18 GBP	17.69%
INVESTMENT COMPANIES	3,610,461.45 GBP	15.51%
OFFSHORE FUNDS	3,410,139.80 GBP	14.65%
MIXED ASSET	1,645,738.05 GBP	7.07%
EXCHANGE TRADED FUNDS	1,547,163.92 GBP	6.65%
IT SOFTWARE & SERVICES	1,309,090.14 GBP	5.62%

5 Show All Transactions

7 Get in touch

Contact us
You can reach out to us securely by sending a message via the 'Get in touch' button

RC Axis User Guide

Overview



At the top of the overview tab you will see the name of the portfolio you are viewing (1), as well as the portfolio number (2), the last valuation date (3), the owner name (4) and the button which allows you to group the data by 'Sector' or 'Geographic' (5).

On the left hand of the screen you are presented with a portfolio overview (6) and a button to generate a portfolio report (7).

On the right hand side you are given a portfolio summary (8).

The screenshot shows the 'My Portfolio' overview page for 'RC Axis Company Limited'. The page features a navigation bar with tabs for OVERVIEW, HOLDINGS, PERFORMANCE, TRANSACTIONS, and DETAILS. The main content area is divided into two columns. The left column, labeled 'PORTFOLIO OVERVIEW', displays 'STOCK VALUATION' at 23,227,630.07 GBP and 'TOTAL CASH' at 52,080.19 GBP, with a 'Total Value' of 23,279,710.26 GBP. The right column, labeled 'PORTFOLIO SUMMARY', features a donut chart showing the total value of 23,279,710.26 GBP, broken down into various asset classes. A 'Generate portfolio report' button is located at the bottom left, and a 'GO TO DOCUMENTS' button is at the bottom right. The page also includes a 'Group by Sector' dropdown menu.

Asset Class	Value (GBP)	Percentage
UNIT TRUSTS & OEICS	4,118,679.18	17.69%
INVESTMENT COMPANIES	3,610,461.45	15.51%
OFFSHORE FUNDS	3,410,139.80	14.65%
MIXED ASSET	1,645,738.05	7.07%
EXCHANGE TRADED FUNDS	1,547,163.92	6.65%
IT SOFTWARE & SERVICES	1,309,090.14	5.62%

RC Axis User Guide

Holdings



Within the Holdings tab, you are able to view your holdings and cash balances (1), simulate a currency conversion (2), generate a portfolio report (3).

There is also the functionality to view holdings you have previously held in the portfolio by toggling 'include zero holdings' (4).

If you want to only view a certain category of holdings, you can filter using the 'Categories' dropdown (5).

There is also the functionality available to export the data to Excel (6).

Clicking into any of the holdings will take you to the 'Position Details' for that holding (7).

The screenshot shows the 'Portfolio Holdings' page for 'RC Axis Company Limited'. The page includes a navigation bar with 'OVERVIEW', 'HOLDINGS', 'PERFORMANCE', 'TRANSACTIONS', and 'DETAILS'. The 'HOLDINGS' tab is active. The page displays summary statistics for 'TOTAL CASH', 'TOTAL SECURITY', and 'TOTAL VALUE'. Below this, there are sections for 'British Government Funds' and 'GBP Denominated Eurobond', each with a table of holdings. The 'British Government Funds' table shows a holding for 'UNITED KINGDOM(GOVERNMENT OF) 0.625% BDS 31/07/2035 GBP1000 'REGS'' with a quantity of 285,000.00 GBP. The 'GBP Denominated Eurobond' table shows a holding for 'NATWEST MARKETS PLC 6.375% SNR EMTN 08/11/27 GBP1000'96'REGS' with a quantity of 200,000.00 GBP. The page also features a 'Generate portfolio report' button, a 'GO TO DOCUMENTS' button, and a 'Simulate currency conversion' button. The 'Include zero holdings' toggle is visible, along with a 'CATEGORIES' dropdown menu. The page is annotated with numbered callouts 1 through 7, highlighting various features and data points.

Quantity	Instrument Name	Price	Book Cost	Market Value	P&L	%
285,000.00 GBP	UNITED KINGDOM(GOVERNMENT OF) 0.625% BDS 31/07/2035 GBP1000 'REGS'	67.39%	-197,946.69 GBP	192,243.56 GBP	-5,703.13 GBP	
SubTotal			-197,946.69 GBP	192,243.56 GBP		

Quantity	Instrument Name	Price	Book Cost	Market Value	P&L	% Gain
200,000.00 GBP	NATWEST MARKETS PLC 6.375% SNR EMTN 08/11/27 GBP1000'96'REGS	104.35%	-201,300.00 GBP	212,924.71 GBP	11,624.71 GBP	
SubTotal			-201,300.00 GBP	212,924.71 GBP		



The position details page displays information about the holding you have clicked into.

At the bottom of your page, you can also see any transactions relating to the holding for that portfolio.

My Portfolio | Secure Inbox | My Documents
axis

Position Details

[Back to portfolio](#)

SCOTTISH MORTGAGE INV TRUST ORD GBP0.05
 SYMBOL: BLDYK61
 ISIN: GB00BLDYK618

Detailed Properties

Portfolio name	
Quantity	Price
1,454.00	8.93 GBP
Value	Value (VC)
12,987.13 GBP	12,987.13 GBP
Pf %	HIST Avg Purchase Price
100.18%	6.19 GBP
Total Book Cost	HIST Index
-8,997.72 GBP	44.34%
Yield in VC	Yield Percentage
61.65 GBP	0.47%
Accrued Interest	
N/A	

Product

LATEST PRICE	DAY CHANGE
8.93 GBP	-0.04 GBP
	↓ -0.40%

Product name
SCOTTISH MORTGAGE INV TRUST ORD GBP0.05

Type	Currency
Share	GBP

Price date
16/07/2024

Price History

1M 3M 6M 1Y YTD

Transactions

Date	Description	Quantity/Amount	Net amount
18/09/2023 11:11	Bought 15 SCOTTISH MORTGAGE INV TRUST ORD GBP0.05 @ 6.942680	15.0000	-104.66 GBP
18/08/2023 14:32	Bought 15 SCOTTISH MORTGAGE INV TRUST ORD GBP0.05 @ 6.368738	15.0000	-96.01 GBP
19/07/2023 15:44	Bought 19 SCOTTISH MORTGAGE INV TRUST ORD GBP0.05 @ 7.068873	19.0000	-134.98 GBP
21/06/2023 08:57	Bought 15 SCOTTISH MORTGAGE INV TRUST ORD GBP0.05 @ 6.736424	15.0000	-101.56 GBP
17/05/2023 11:01	Bought 16 SCOTTISH MORTGAGE INV TRUST ORD GBP0.05 @ 6.209000	16.0000	-99.84 GBP
21/04/2023 11:11	Bought 15 SCOTTISH MORTGAGE INV TRUST ORD GBP0.05 @ 6.418980	15.0000	-96.76 GBP
22/03/2023 09:51	Bought 16 SCOTTISH MORTGAGE INV TRUST ORD GBP0.05 @ 6.597860	16.0000	-106.10 GBP
21/02/2023 15:03	Bought 14 SCOTTISH MORTGAGE INV TRUST ORD GBP0.05 @ 7.246400	14.0000	-101.96 GBP
18/01/2023 14:47	Bought 12 SCOTTISH MORTGAGE INV TRUST ORD GBP0.05 @ 7.796464	12.0000	-94.03 GBP
20/12/2022 14:54	Bought 17 SCOTTISH MORTGAGE INV TRUST ORD GBP0.05 @ 7.173879	17.0000	-122.57 GBP
17/11/2022 16:03	Bought 12 SCOTTISH MORTGAGE INV TRUST ORD GBP0.05 @ 7.925014	12.0000	-95.58 GBP
19/10/2022 10:26	Bought 14 SCOTTISH MORTGAGE INV TRUST ORD GBP0.05 @ 7.427697	14.0000	-104.51 GBP
16/09/2022 09:49	Bought 12 SCOTTISH MORTGAGE INV TRUST ORD GBP0.05 @ 8.325986	12.0000	-100.41 GBP
16/08/2022 11:34	Bought 11 SCOTTISH MORTGAGE INV TRUST ORD GBP0.05 @ 9.101740	11.0000	-100.62 GBP
18/07/2022 12:23	Bought 15 SCOTTISH MORTGAGE INV TRUST ORD GBP0.05 @ 8.036340	15.0000	-121.15 GBP
21/06/2022 11:57	Bought 14 SCOTTISH MORTGAGE INV TRUST ORD GBP0.05 @ 7.056380	14.0000	-99.28 GBP
18/05/2022 09:07	Bought 14 SCOTTISH MORTGAGE INV TRUST ORD GBP0.05 @ 7.917560	14.0000	-111.40 GBP
20/04/2022 09:32	Bought 10 SCOTTISH MORTGAGE INV TRUST ORD GBP0.05 @ 9.398680	10.0000	-94.46 GBP
17/03/2022 11:04	Bought 10 SCOTTISH MORTGAGE INV TRUST ORD GBP0.05 @ 9.821859	10.0000	-98.71 GBP
14/02/2022 10:13	Bought 10 SCOTTISH MORTGAGE INV TRUST ORD GBP0.05 @ 10.3219	10.0000	-103.74 GBP
18/01/2022 11:27	Bought 9 SCOTTISH MORTGAGE INV TRUST ORD GBP0.05 @ 11.148	9.0000	-100.83 GBP
16/12/2021 09:18	Bought 9 SCOTTISH MORTGAGE INV TRUST ORD GBP0.05 @ 13.999142	9.0000	-126.62 GBP



The portfolio performance tab displays information relating to the performance of the portfolio.

You can customise your view of the data by choosing the time period (1), view (2) and return type (3).

You can also export the data to Excel (4).

If you want to view the performance of the portfolio within a specific date range, you can use the date filter to do so (5).

You will also see that the performance is also listed in a table at the bottom of the page (6).

Hovering over any of the points on the graph will show you the portfolio value on that date (7).

My Portfolio Secure Inbox My Documents

Portfolio Performance

RC Axis Company Limited

OVERVIEW HOLDINGS PERFORMANCE TRANSACTIONS DETAILS

PORTFOLIO RC Axis Company Limited VALUATION DATE 10/03/2025 OWNER NAME RC Axis Company Limited

PERFORMANCE

1 PERIOD Last Year 2 VIEW Monthly 3 RETURN TYPE Portfolio value 4 5

7 Date: 30/11/2024 Ptf Value: 23,189,098.02 GBP

6

Date	Net Cash Flow	Ptf Value	Net Periodical	Net Cumulative
10/03/2025	0.00 GBP	23,279,710.26 GBP	-1.36%	8.26%
28/02/2025	0.00 GBP	23,601,841.77 GBP	-1.31%	9.76%
31/01/2025	0.00 GBP	23,916,039.85 GBP	4.82%	11.22%
31/12/2024	0.00 GBP	22,816,088.69 GBP	-1.61%	6.11%
30/11/2024	0.00 GBP	23,189,098.02 GBP	2.89%	7.84%



The portfolio transactions page displays information relating to the transactions performed on the portfolio.

You can use the scroll bar at the bottom of the screen to view all of the information relating to the transaction (1).

RC Axis allows you to filter the transactions by period (2) or specific dates (3). The data can also be exported to Excel (4).

My Portfolio Secure Inbox My Documents

Portfolio Transaction

RC Axis Company Limited

OVERVIEW HOLDINGS PERFORMANCE **TRANSACTIONS** DETAILS

PORTFOLIO RC Axis Company Limited VALUATION DATE 10/03/2025 OWNER NAME RC Axis Company Limited

Date	Description	Security Name
19/11/2024	Bought 10000 BP ORD USD0.25 @ 3.871000	BP ORD USD0.25
19/11/2024	Bought 10000 BP ORD USD0.25 @ 3.871000	Dealing
04/10/2024	Dividend : 131667 Personal Assets Trust PLC GBP0.125	PERSONAL ASSETS TRUST PLC GBP0.125
04/10/2024	Dividend : 131667 Personal Assets Trust PLC GBP0.125	Income
30/09/2024	Gross Interest to 27/09/2024	Income
30/09/2024	Gross Interest to 27/09/2024	Income
30/09/2024	Gross Interest to 27/09/2024	Income
27/09/2024	Transfer to/from NDA00044, Re:Settlement of I449351	Dealing
27/09/2024	Re:Purchase of 27665 NEUBERGER BERMAN INVESTMENT FDS PLC GLOBAL EQUITY MEGATRENDS GBP ACC	Capital
26/09/2024	Dividend : 11285 Vanguard Funds PLC FTSE Japan UCITS ETF GBP Dis	VANGUARD FUNDS PLC FTSE JAPAN UCITS ETI
26/09/2024	Dividend : 2250 JPMorgan Funds Global Healthcare C GBP Dis	Income
26/09/2024	Dividend : 2250 JPMorgan Funds Global Healthcare C GBP Dis	JPMORGAN FUNDS GLOBAL HEALTHCARE C G
26/09/2024	Dividend : 6000 Rio Tinto Ord GBP0.10	RIO TINTO ORD GBP0.10
26/09/2024	Dividend : 6000 Rio Tinto Ord GBP0.10	Income
26/09/2024	Dividend : 11285 Vanguard Funds PLC FTSE Japan UCITS ETF GBP Dis	Income
25/09/2024	Transfer to cover fees	Fee

1 2 3 4 16 >



The Details tab provides you with information relating to your portfolio (1), the owner of the portfolio (2), the managing agency of the portfolio (3), the Investment team of the portfolio (4), the direct portfolio manager (5) and which individuals have online access and advisor access to the portfolio via RC Axis (6).

My Portfolio Secure Inbox My Documents

My Portfolio
RC Axis Company Limited

OVERVIEW HOLDINGS PERFORMANCE TRANSACTIONS **DETAILS**

PORTFOLIO RC Axis Company Limited - ██████████ VALUATION DATE 10/03/2025 OWNER NAME RC Axis Company Limited

PORTFOLIO INFORMATION ①

Portfolio Name
RC Axis Company Limited

Portfolio Number
██████████

PORTFOLIO ROLES

Owner ②
RC Axis Company Limited

Managing Agency ③ Ramsey Crookall & Co Ltd	Investment Team ④ RAMSEY CROOKALL	Direct Portfolio Manager ⑤ ██████████
Online Access (Read Only) ⑥ ██████████	Online Access (Read Only) ██████████	Online Access (Read Only) ██████████
Online Access (Read Only) ██████████	Online Access (Read Only) ██████████	Online Access (Read Only) ██████████
Online Access (Read Only) ██████████	Online Access (Read Only) ██████████	Advisor View ██████████

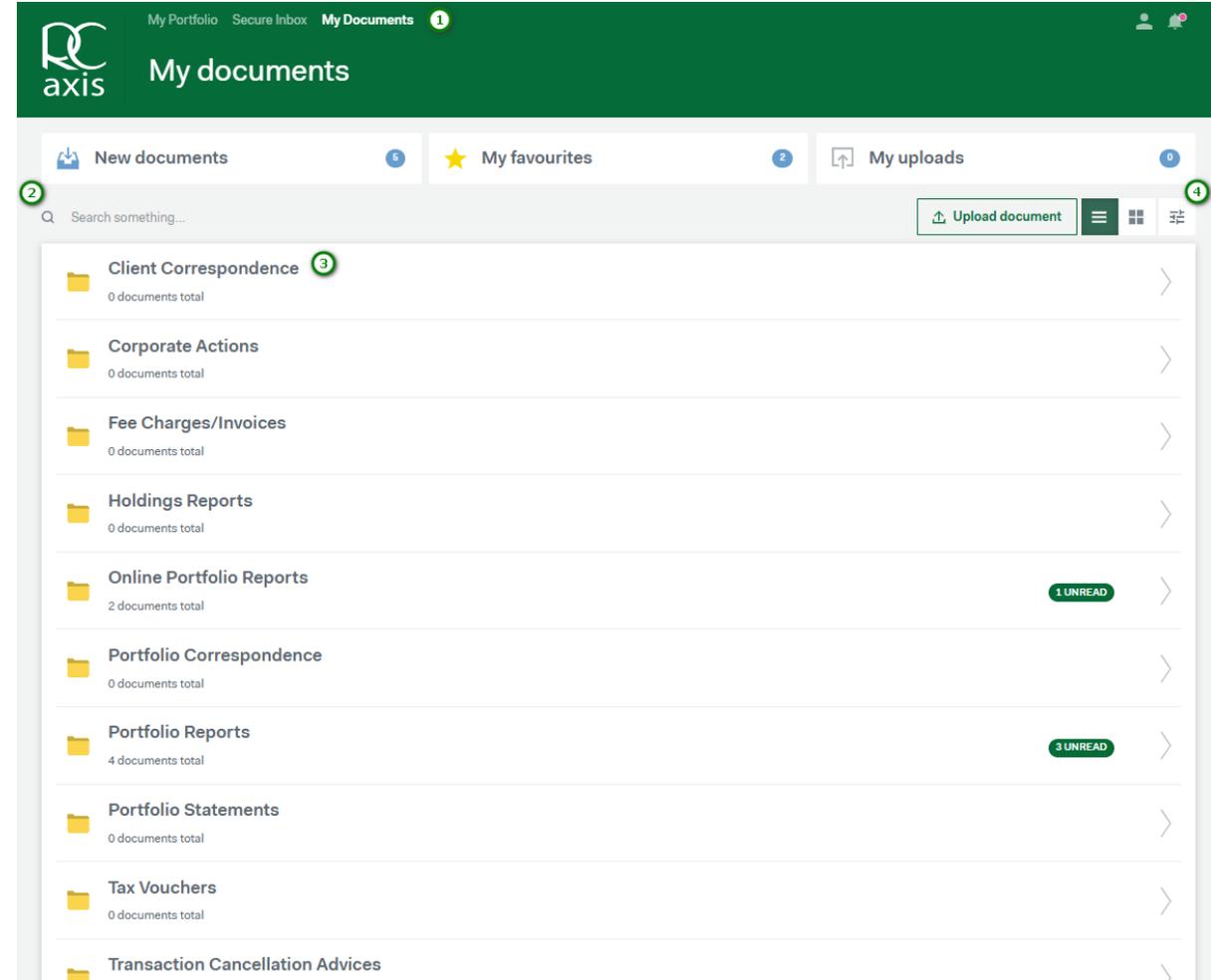
My Documents

The 'My Documents' page allows you access to your portfolio documents (1).

You can use the search bar to search for a particular document (2).

You can click into any of the folders to view documents under the category (3).

The date filter allows you to view documents within a certain date period (4).



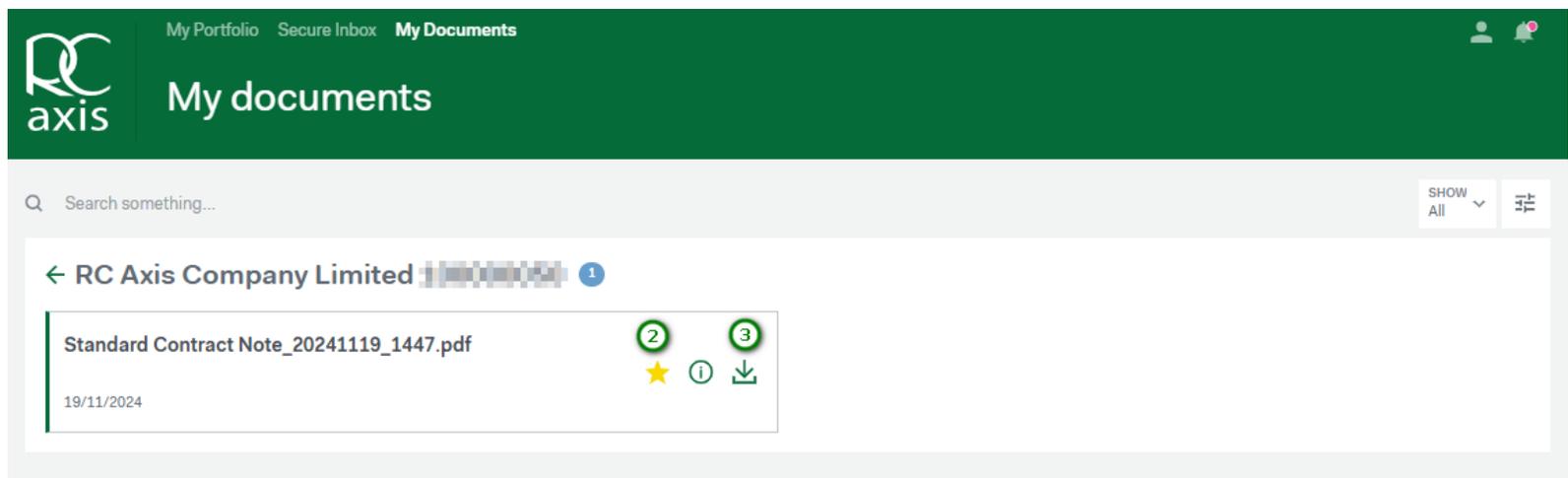
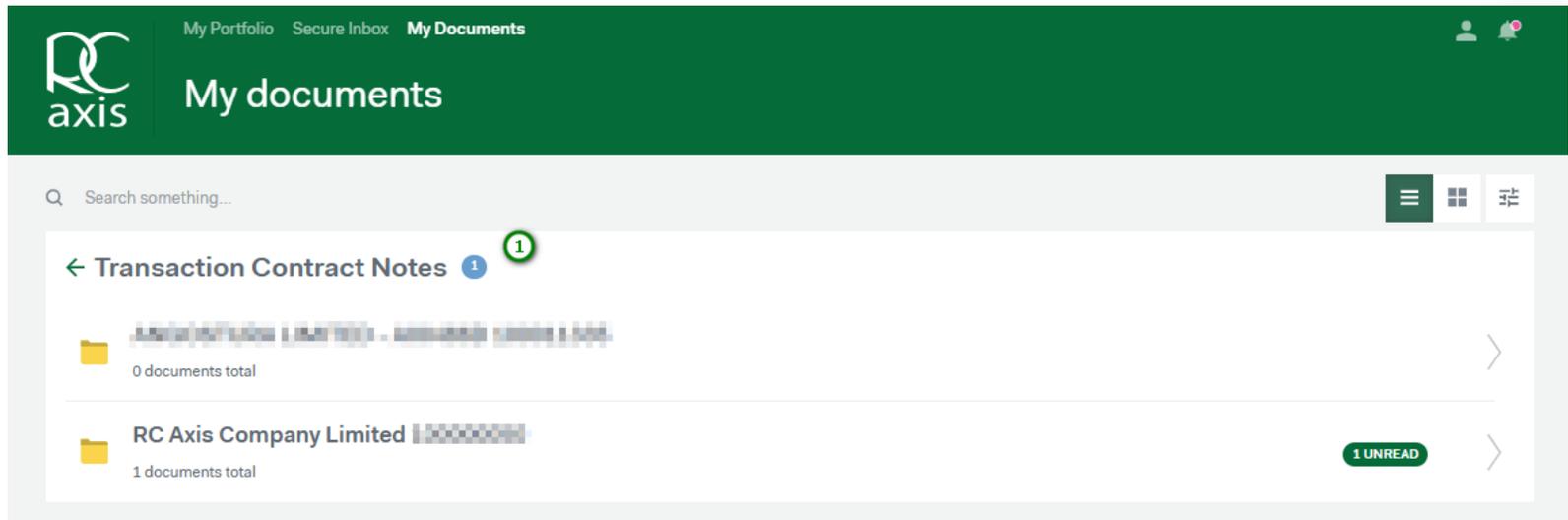
The screenshot displays the 'My Documents' interface. At the top, there is a navigation bar with 'My Portfolio', 'Secure Inbox', and 'My Documents' (1). Below this, the page title 'My documents' is shown. The main content area features three tabs: 'New documents' (6), 'My favourites' (3), and 'My uploads' (0). A search bar (2) is located below the tabs, with an 'Upload document' button and a filter icon (4) to its right. The document list includes the following categories:

- Client Correspondence (3) - 0 documents total
- Corporate Actions - 0 documents total
- Fee Charges/Invoices - 0 documents total
- Holdings Reports - 0 documents total
- Online Portfolio Reports - 2 documents total, 1 UNREAD
- Portfolio Correspondence - 0 documents total
- Portfolio Reports - 4 documents total, 3 UNREAD
- Portfolio Statements - 0 documents total
- Tax Vouchers - 0 documents total
- Transaction Cancellation Advices



By clicking into one of the document categories you will be prompted to select the portfolio you want to view documents in this category for (if your online access is linked to more than one portfolio) (1).

Once you have selected the relevant portfolio, you will have the option to 'Favourite' (2) or 'Download' (3) the document





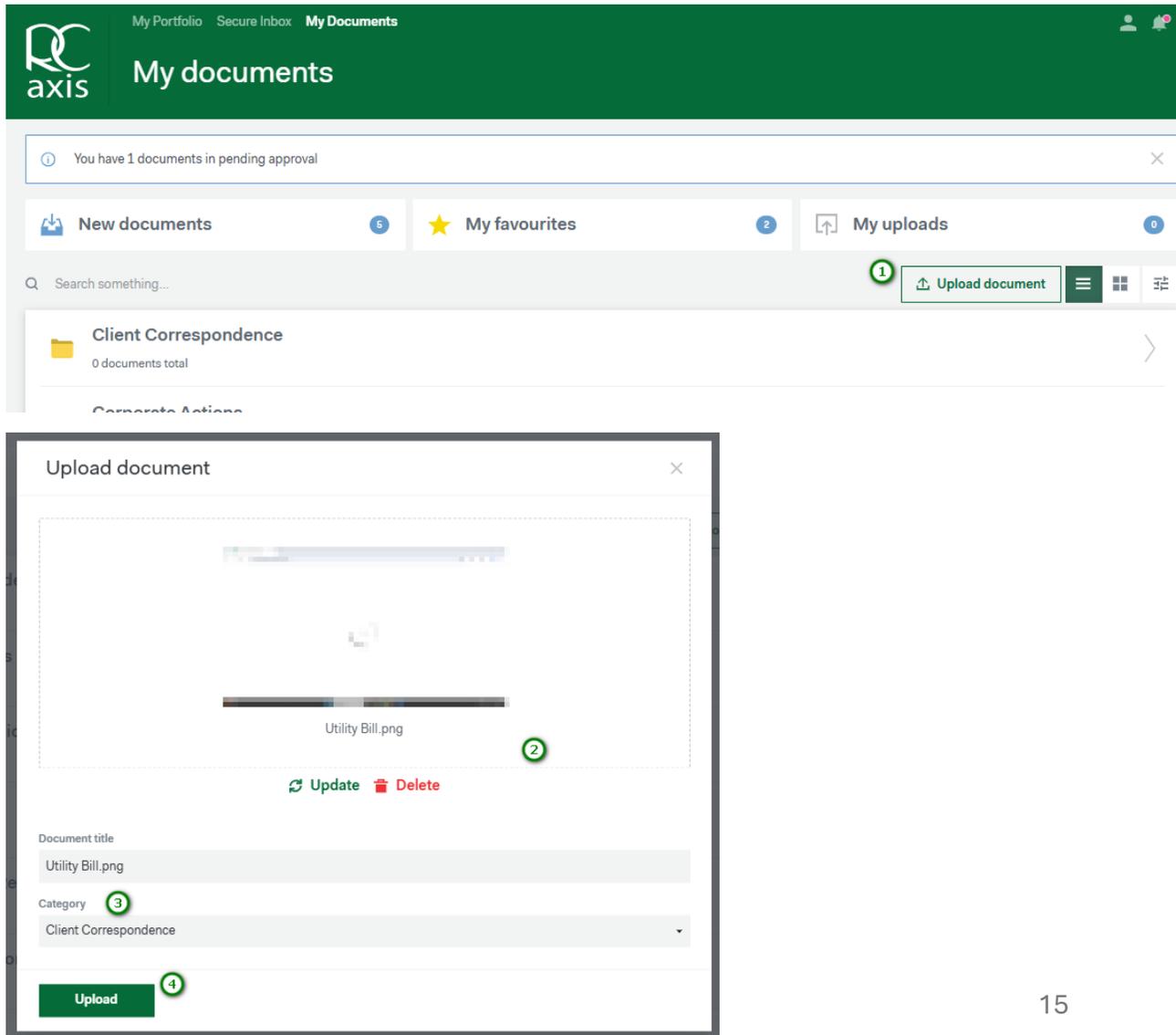
RCAxis also has the functionality to upload documents which will then be sent to our Compliance team for review (1).

Attach your PDF, PNG or JPEG file, this will then auto-populate the document title (2).

Select the 'Client Correspondence' category (3).

Click Upload (4).

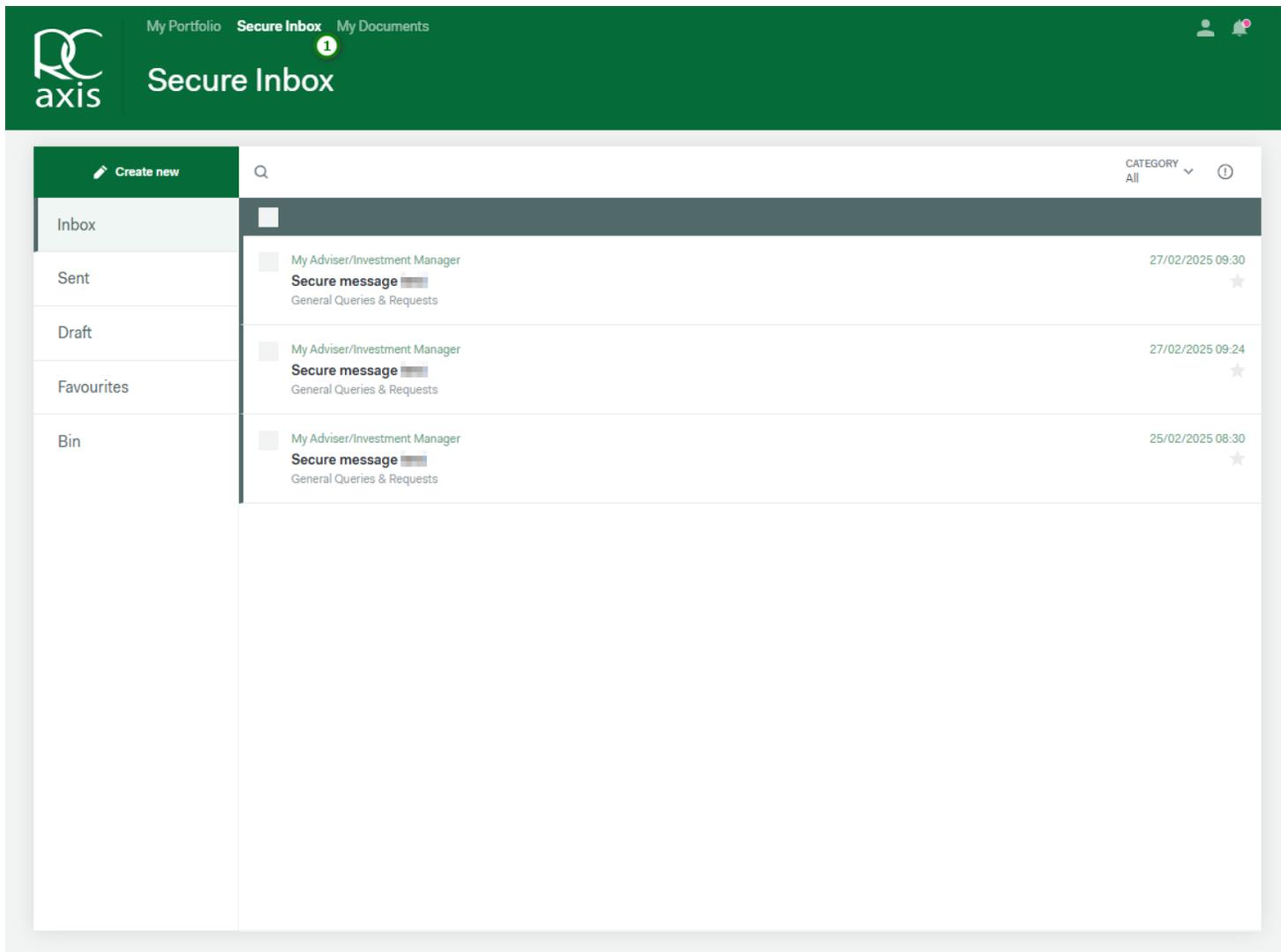
Your document will then be reviewed by our Compliance Team who will either approve or reject the document.





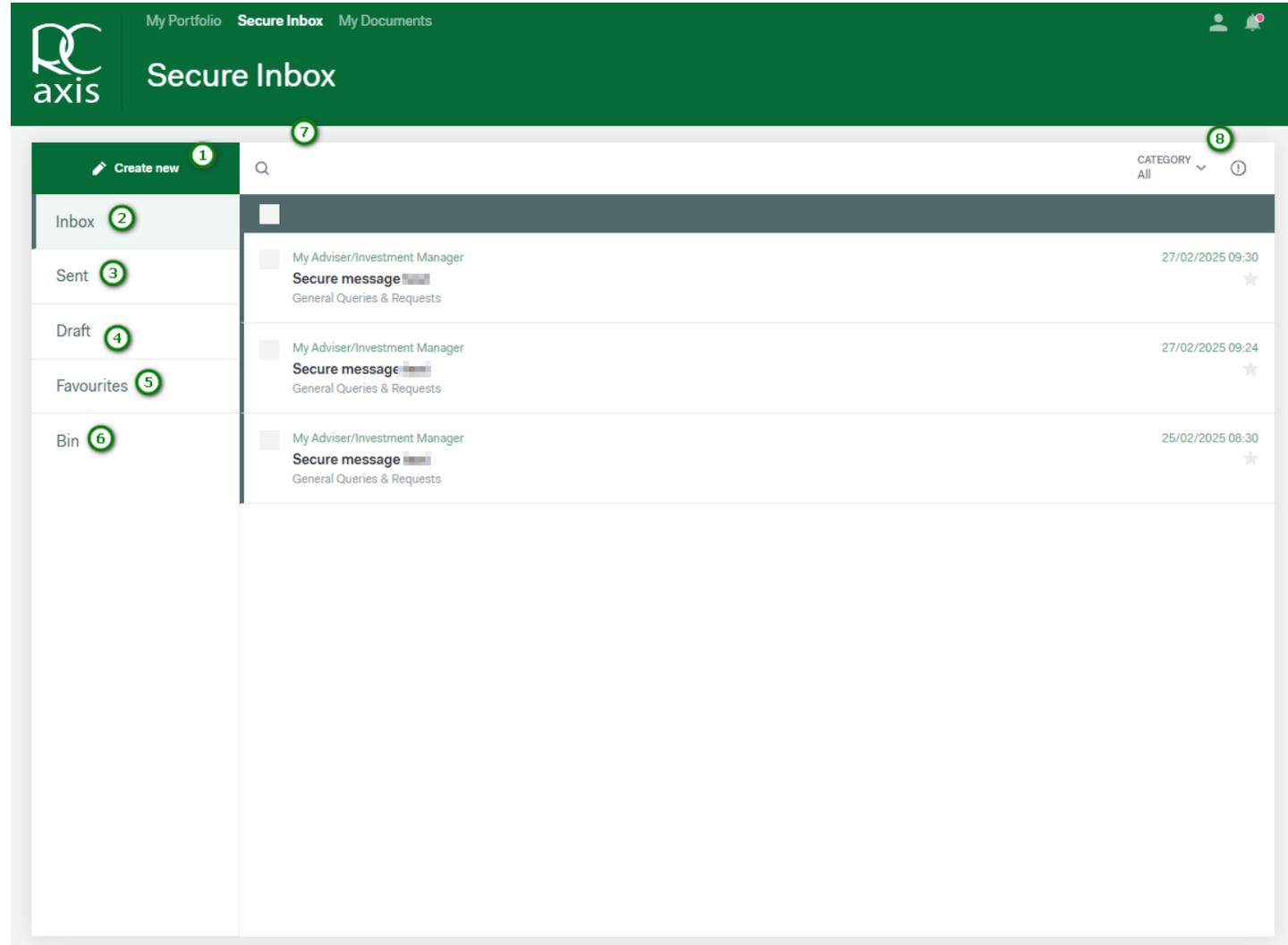
Clicking the ‘Secure Inbox’ button at the top of the screen will take you to your secure inbox (1).

Here you can view all of the secure messages sent to you, as well as send messages to your contact at Ramsey Crookall.



Within the secure messages, you can create a new message (1), view messages from Ramsey Crookall in your inbox (2), view previously sent messages (3), view your drafts (4), view messages you have favourited (5) and messages you have filed in the Bin (6).

You can also search for specific messages using the search bar (7) and filter your messages by category (8).



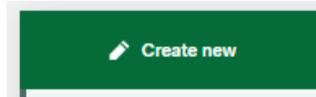
The screenshot displays the 'Secure Inbox' interface. At the top, there are navigation links for 'My Portfolio', 'Secure Inbox', and 'My Documents'. The main header includes the 'RC axis' logo and the title 'Secure Inbox'. On the left, a sidebar contains a 'Create new' button (1) and a list of folders: 'Inbox' (2), 'Sent' (3), 'Draft' (4), 'Favourites' (5), and 'Bin' (6). The main content area features a search bar (7) and a 'CATEGORY' dropdown menu (8) set to 'All'. Below these, three message entries are visible, each from 'My Adviser/Investment Manager' and titled 'Secure message' with the subject 'General Queries & Requests'. The messages are dated 27/02/2025 09:30, 27/02/2025 09:24, and 25/02/2025 08:30, and each has a star icon.

How to create a secure message

RC Axis allows users to directly contact a team at Ramsey Crookall via secure messaging.

To create a secure message, follow the steps below:

Step 1: Click 'Create new'



Step 2: Select who in Ramsey Crookall you wish to send the message to.

Step 3: Type in your subject line

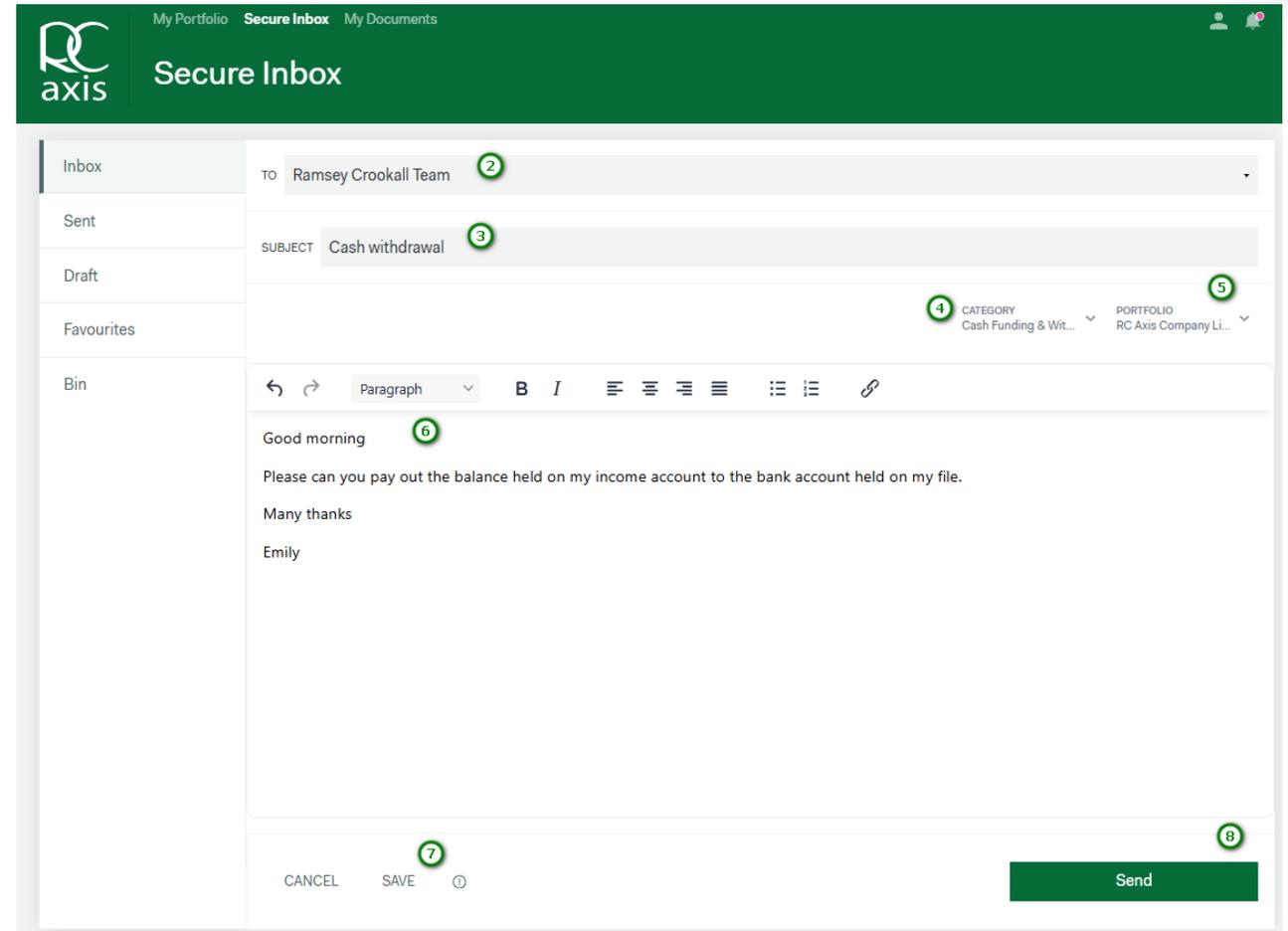
Step 4: Select the category your message relates to

Step 5: Select the portfolio your message relates to (this is only necessary where you have more than one portfolio linked to your RC Axis).

Step 6: Type out your message

Step 7: You do have the option to save your message as a draft for sending later

Step 8: Once you are happy with the message you can click send

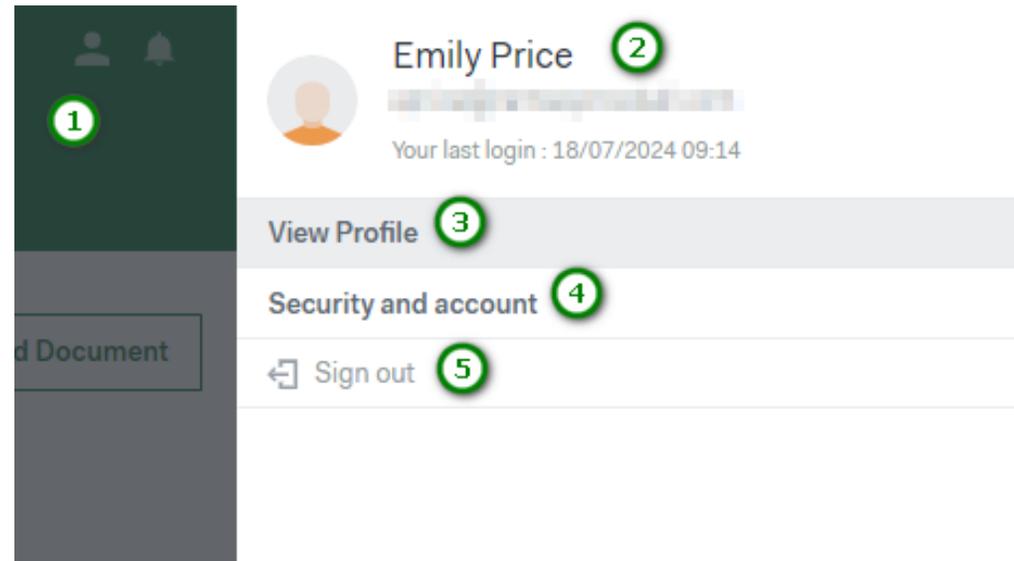


By clicking on the person icon in the top right-hand corner of the screen (1), a side bar will appear with details of your profile (2).

Here you can click 'View Profile' for more information on your profile (3).

You can click 'security and account' to change your password or two-factor authentication preferences (4).

You can also sign out from this side bar (5).



In the 'View Profile' section, you can view personal information which we hold on our records for you.

You can also choose to make a certain portfolio default. This means that when you login you will be taken straight to this portfolio rather than selecting it from the list of portfolios when you first login.

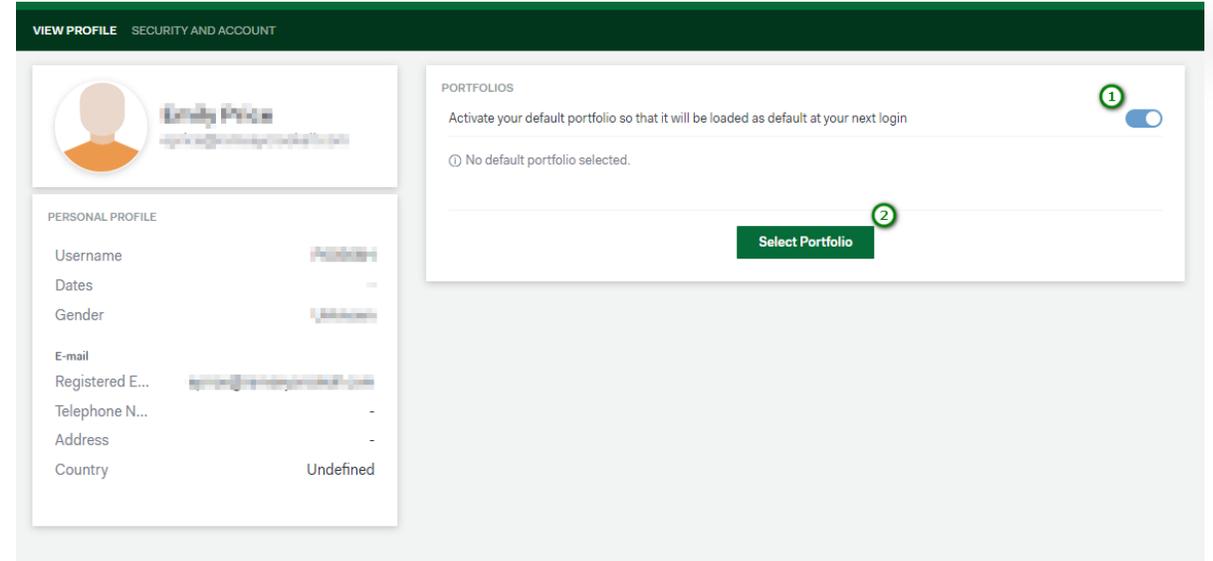
To select a default portfolio:

Step 1: Click the toggle

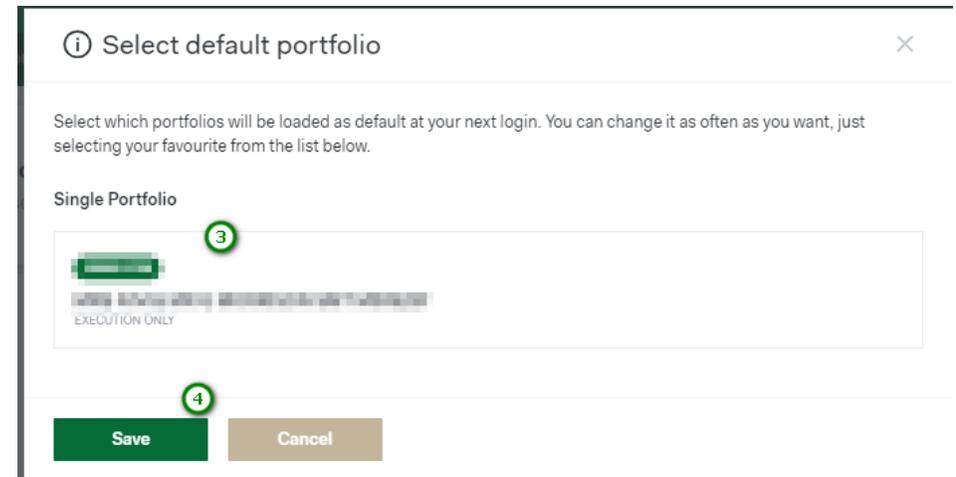
Step 2: Click 'Select Portfolio'

Step 3: Select the portfolio you wish to have as default

Step 4: Click 'Save'



The screenshot shows the 'VIEW PROFILE SECURITY AND ACCOUNT' page. On the left is the 'PERSONAL PROFILE' section with fields for Username, Dates, Gender, E-mail, Registered E..., Telephone N..., Address, and Country. On the right is the 'PORTFOLIOS' section. It features a toggle switch (1) to activate the default portfolio. Below the toggle, it says 'No default portfolio selected.' and a 'Select Portfolio' button (2).



The screenshot shows a dialog box titled 'Select default portfolio'. It contains instructions: 'Select which portfolios will be loaded as default at your next login. You can change it as often as you want, just selecting your favourite from the list below.' Below this is a 'Single Portfolio' section with a list of portfolios (3). At the bottom, there are 'Save' (4) and 'Cancel' buttons.



If you wish to change your password, you can click into 'Security and account' from the 'My Profile' side bar.

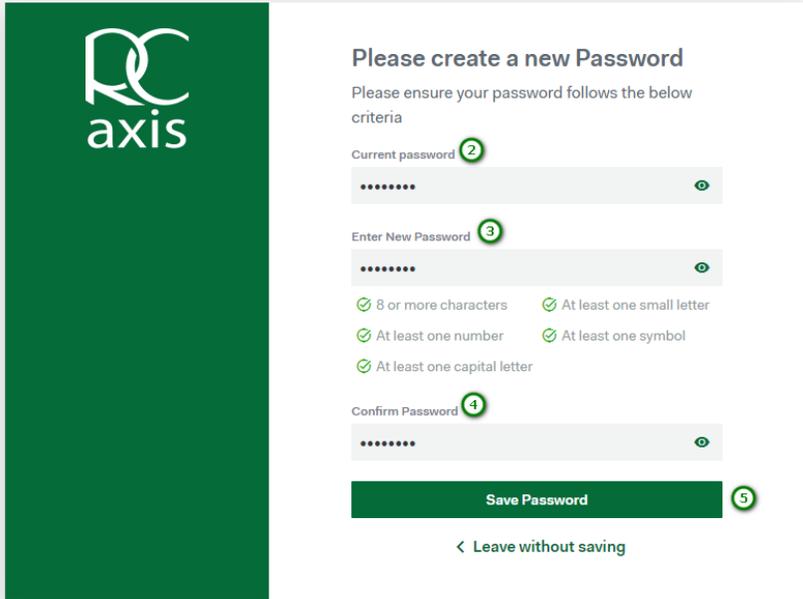
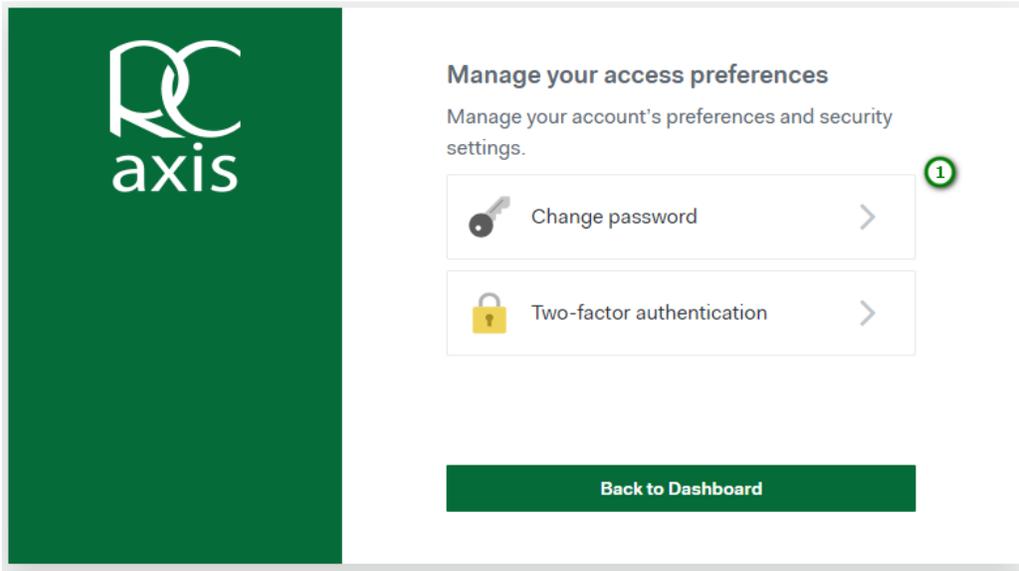
Step 1: Click 'Change Password'

Step 2: Enter your current password

Step 3: Enter your new password – ensuring it fits within the criteria required

Step 4: Re-enter your new password to confirm

Step 5: Click 'Save Password'

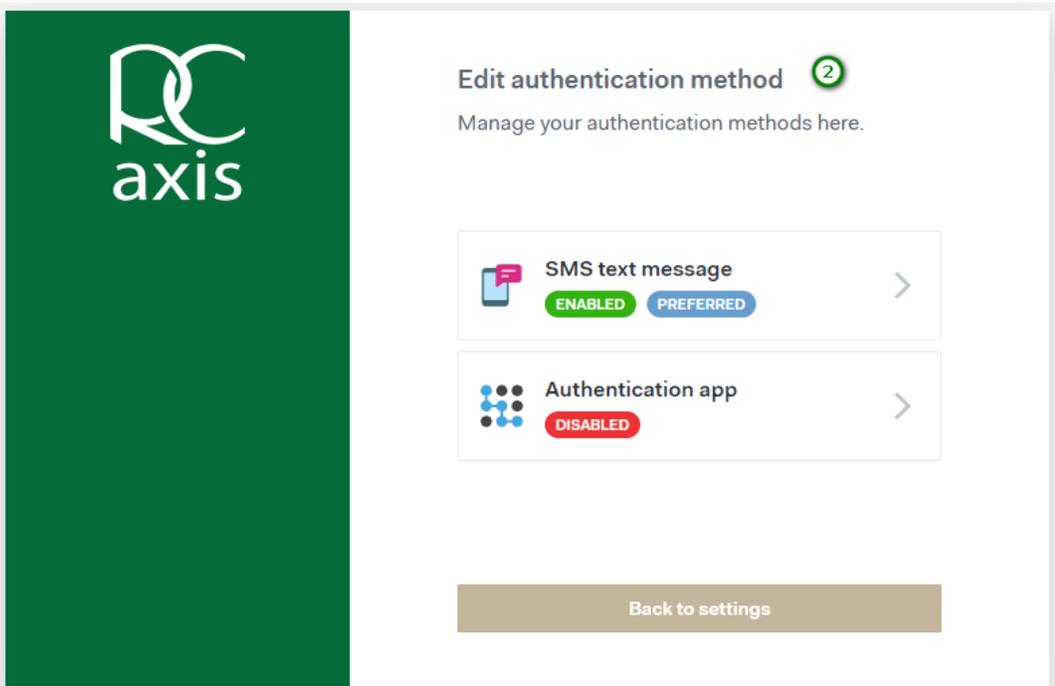
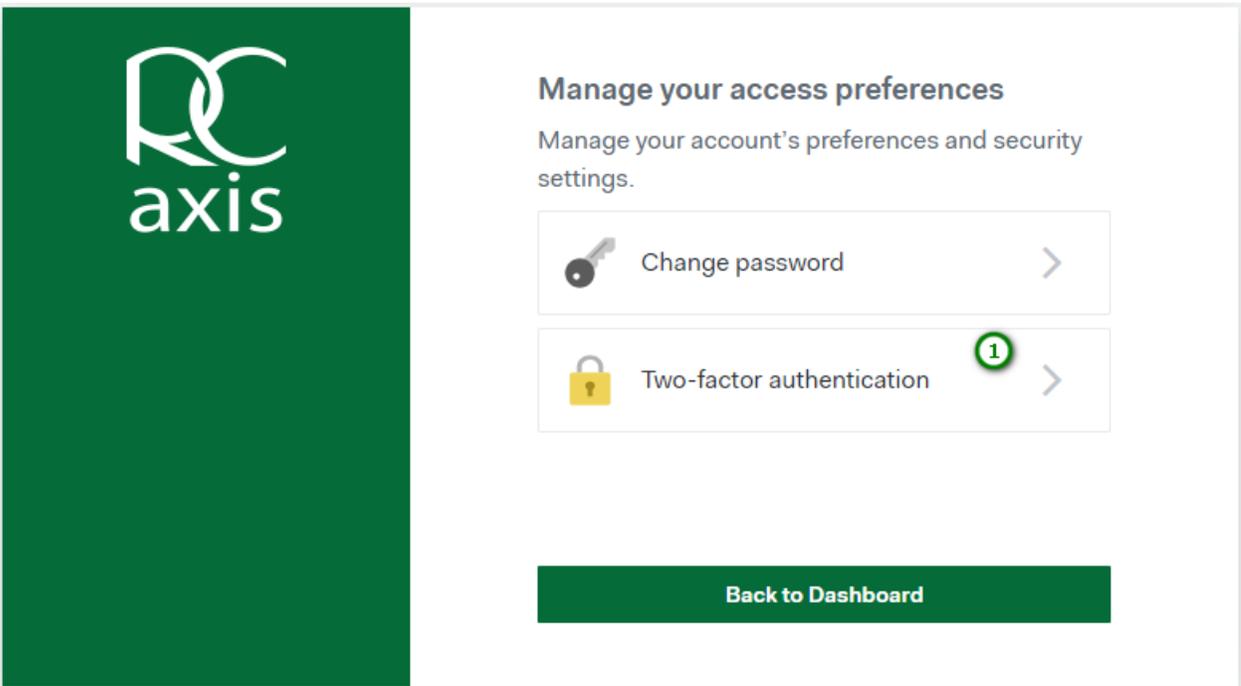




In the same area that you can change your password, you can also manage your two-factor authentication preferences.

Step 1: Click into 'Two-factor authentication'

Step 2: You will then be brought to a page where you can edit your authentication method





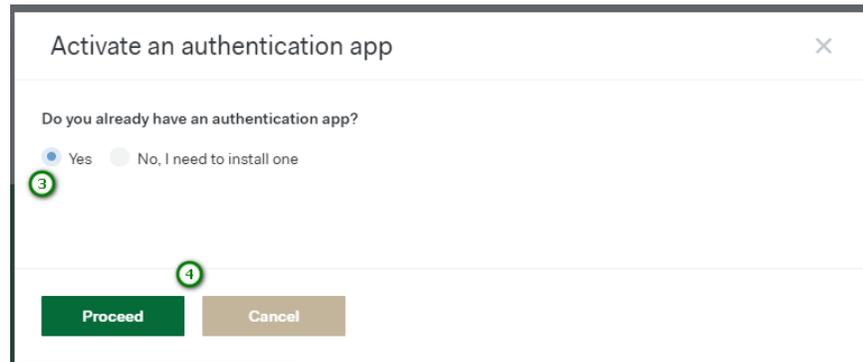
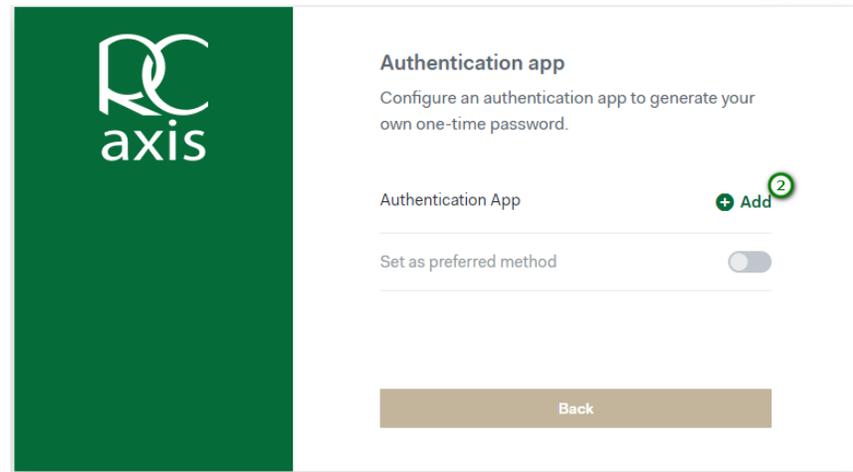
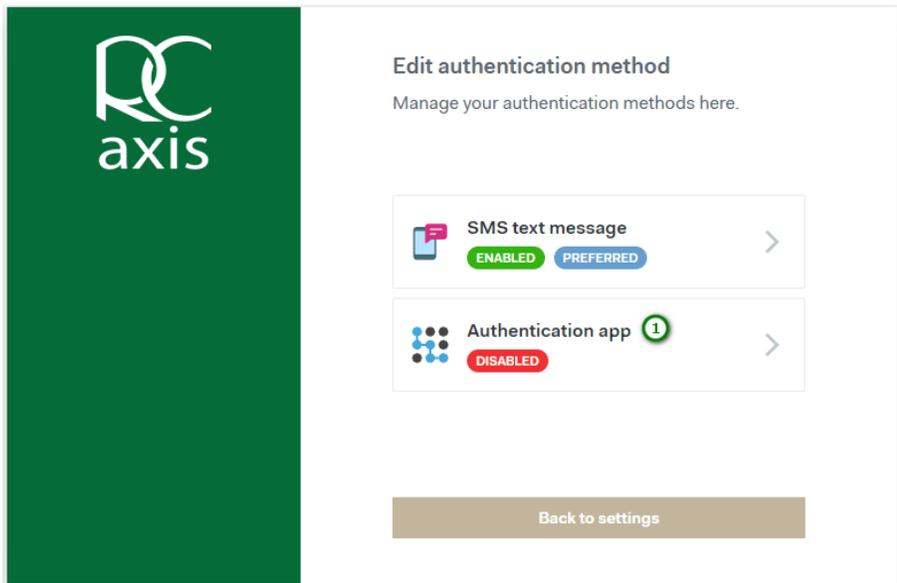
Once you have set up your RC Axis, you should link your authenticator app to your RC Axis, this will make it more efficient when you login.

Step 1: Once you have clicked into 'two-factor' authentication, click 'Authentication app'

Step 2: Click the 'Add' button

Step 3: Click either 'Yes' or 'No, I need to install one'

Step 4: Click 'Proceed'

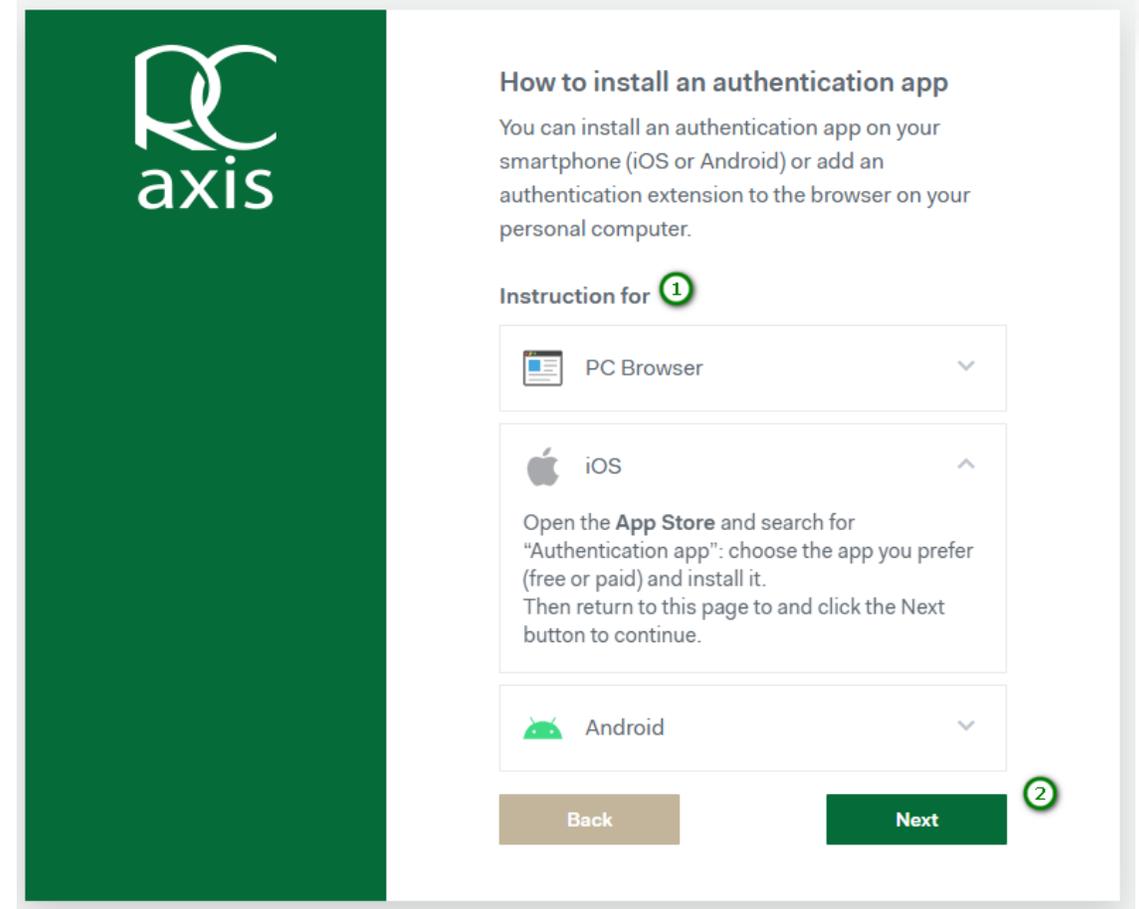


If you do not already have an authenticator app installed, you should follow the below steps:

Step 1: Select the relevant instructions depending on which environment you will be using RC Axis through

Step 2: Once you have read the instructions and downloaded the authenticator app, click 'Next

Step 3: You can then follow the instructions over the next page for when you have the authenticator app downloaded



How to install an authentication app

You can install an authentication app on your smartphone (iOS or Android) or add an authentication extension to the browser on your personal computer.

Instruction for **1**

PC Browser

iOS

Open the **App Store** and search for "Authentication app": choose the app you prefer (free or paid) and install it. Then return to this page to and click the Next button to continue.

Android

Back Next **2**

RC Axis User Guide

How to enable your authentication app if you already have the authenticator downloaded



If you already have the authenticator app downloaded, you should follow the below steps:

Step 1: Open your authenticator app

Step 2: Either scan the QR code or copy the long code into your app

Step 3: Click 'Next'

Step 4: Enter the code displayed on your verification app

Step 5: Click 'Next'

Step 6: Toggle to set this as your preferred two-factor method

Step 7: Click 'Done'

