BNY | INVESTMENTS
NEWTON

NEWTON PORTAL

A quick reference guide to our online services

August 2025

Please read the important disclosures at the end of this document.

NEWTONIM.COM

The Newton website showcases a wealth of information for our clients, providing an insight into our investment approach and various investment strategies.

You can view a selection of articles, blog posts, videos and podcasts, as well as our latest news.

Newton Portal

Newton Portal is an easy-to-use tool for all our clients, providing up-to-date valuations and detailed portfolio breakdowns.

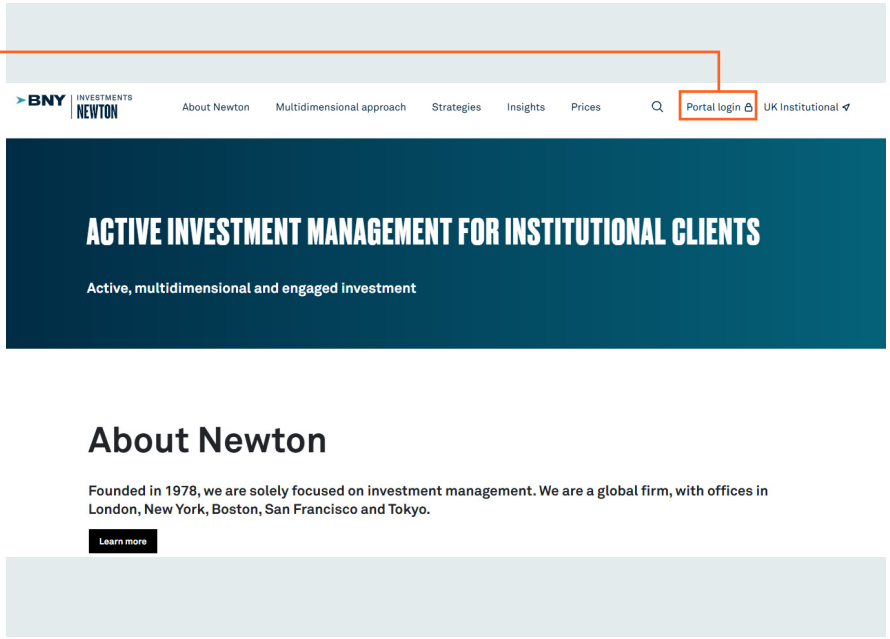
This document takes you through the information available to you via Newton Portal.

If you would like access to this service, please contact your usual Newton contact.

Once your request has been authorized you will be sent your username and temporary password.

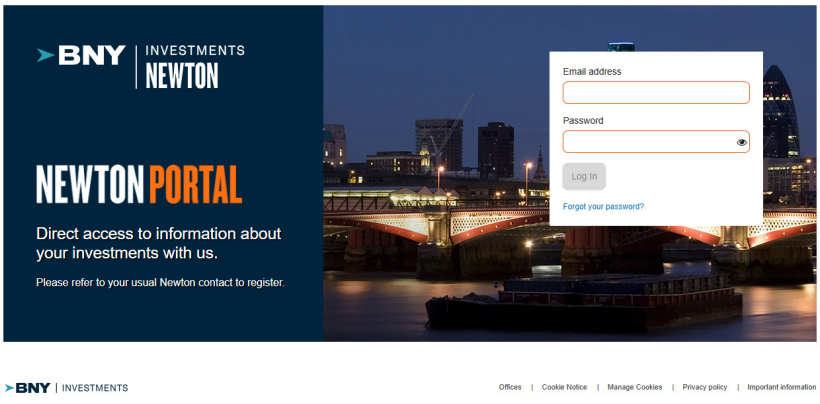
Logging in for the first time

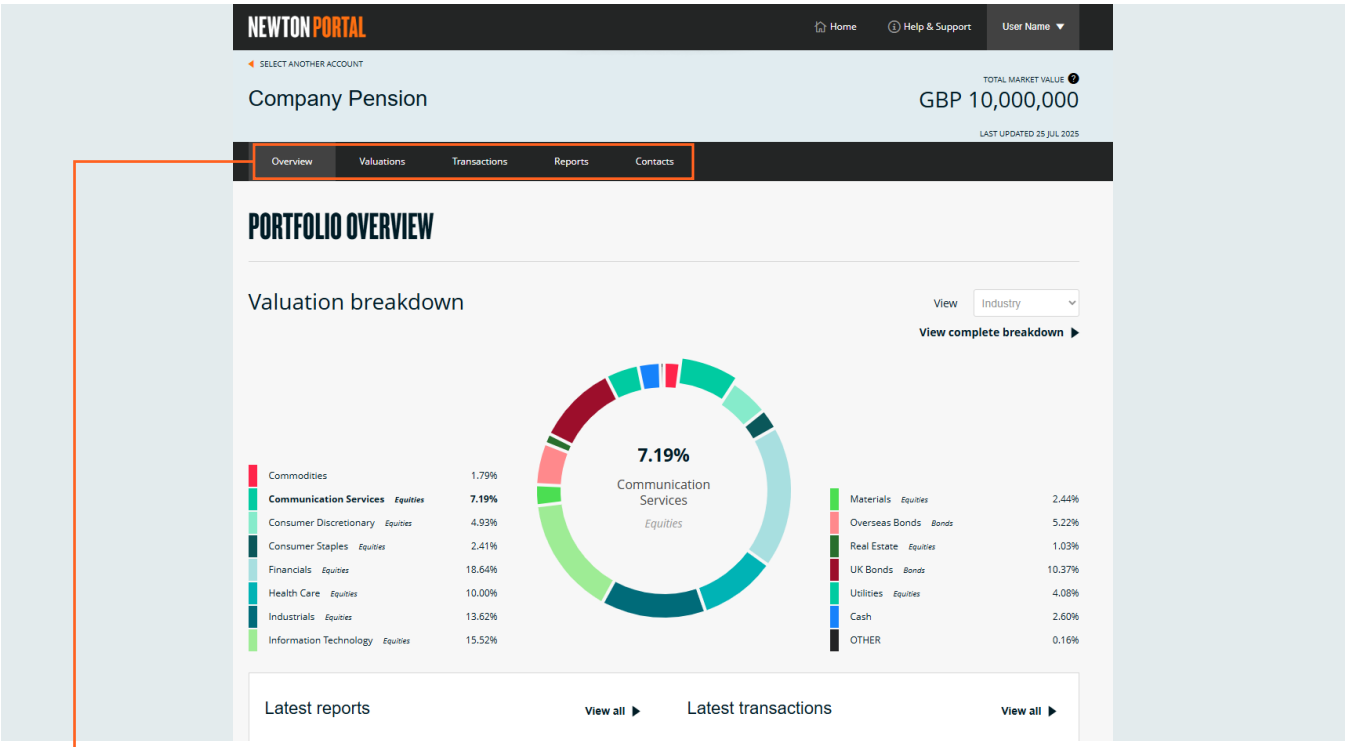
Newton Portal can be accessed by selecting the 'Portal login' link located at the top of the Newton website. You will then be prompted to enter your username and temporary password, as provided by your Newton contact.



When logging in for the first time, you will be asked to read and agree to our site terms and conditions. You will then be prompted to change your temporary password to one of your choice, which you will use each time you log into Newton Portal in the future. It is very important that you do not write your password down or reveal it to anyone else.

Once you have successfully logged into your account you will be able to view and download your portfolio information.





Navigation

To navigate through Newton Portal, simply select the relevant page from the navigation bar near the top of the window, starting with 'Overview' through to 'Contacts'.

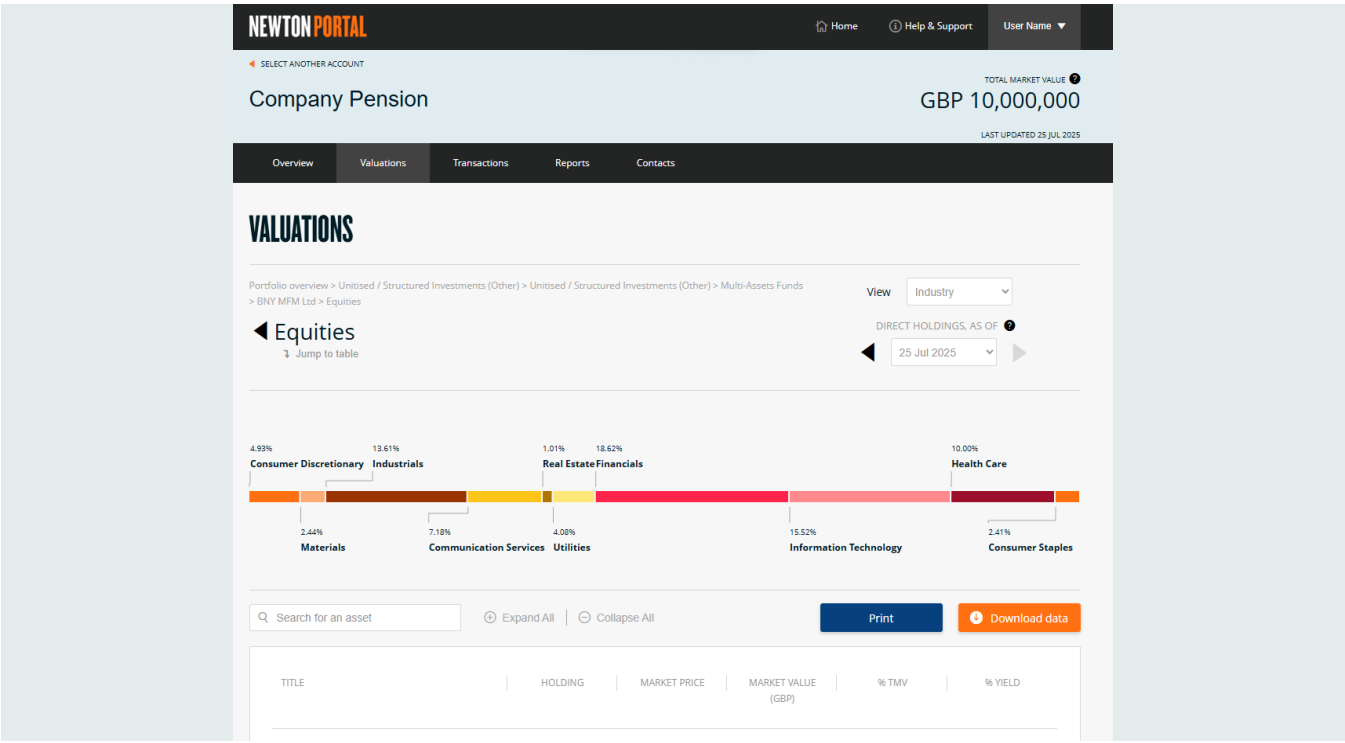
Overview (shown above)

This screen gives a breakdown of the holdings in your portfolio by both geography and industry.

For more detail, you can run the cursor over the different segments of the chart.

You are also provided with a list of your latest reports and transactions, plus details of your usual Newton contacts.

The market value of your portfolio (as at the close of business on the previous working day) is displayed at the top right of each screen.



Valuations (shown above)

To access the Valuations page, simply select 'Valuations' from the navigation bar. This page provides a more detailed breakdown of your portfolio.

Portfolio holdings are represented in an interactive graphical 'strudel chart'. Select a segment of the strudel chart to view your underlying holdings.

Alternatively you can view your holdings in a more traditional tabular format. Using the + icons you can expand any security class to reveal the holdings within.

You can view the underlying investments for any Newton Collective Funds within your portfolio. This information can be printed, or downloaded (in a .csv format) for review in an appropriate spreadsheet package.

Please note that this information is unaudited; no reliance should be placed on unaudited data.

Transactions

To access the Transactions section, simply select 'Transactions' from the navigation bar. This page displays a list of all transactions made on your portfolio in the last 90 days.

Transactions are updated daily, and include those made up to the close of business on the previous working day.

This information can be printed, or downloaded (in a .csv format) for review in an appropriate spreadsheet package.

Please note that this information is unaudited; no reliance should be placed on unaudited data.

Reports

To access the Reports section, simply select the 'Reports' tab in the navigation bar.

This page displays any reports that may be provided by Newton from time to time.

This information can be downloaded as a PDF for review with appropriate software.

Contacts

To access the Contacts section of Newton Portal, simply select the 'Contacts' tab in the navigation bar.

This page contains our contact details and allows you to send us a secure message.

Please note that account transactions cannot be accepted via this service. All orders must be transmitted directly with the client service team or your Relationship Manager.

Frequently Asked Questions

Question:
I have forgotten my password. What should I do?

Answer:
Please refer to your usual Newton contact who will be able to assist you.

Question:
How do I change my password?

Answer:
Please advise your usual Newton contact who will be able to assist you.

Question:
My email address has changed. What should I do?

Answer:
Advise your usual Newton contact, who will make arrangements to update your account.

Question:
My account is locked. How do I unlock it?

Answer:
Advise your usual Newton contact, who will make arrangements to unlock your account.

Question:
How did my account become locked?

Answer:
Either three consecutive incorrect passwords were input or the account had not been accessed for an extended period of time.

Question:
I have a query about my valuation. Who do I contact?

Answer:
Please refer to your usual Newton contact.

Question:
How do I manage (provide or revoke) another individual's access to my portfolio?

Answer:
You can make this request via your usual Newton contact. We advise that you only grant access to further individuals where necessary.

Question:
I am invested in a Collective Fund; how is this shown on the Valuations page?

Answer:
The valuation shown is at the close of business on the previous working day. The underlying holding information for your Collective Fund will be between 5 and 10 days old (updated every Friday) and shows the Total Market Value % held at that time.

Important information

BNY Investments Newton is the name for a group of affiliated companies that provide investment management services under the trading name of 'Newton' or 'Newton Investment Management'. Investment management services are provided in the United Kingdom by Newton Investment Management Ltd (NIM), in the United States by Newton Investment Management North America LLC (NIMNA), and in Japan by Newton Investment Management Japan Limited (NIMJ). NIMNA was established in 2021 and NIMJ was established in March 2023. In the United Kingdom, NIM is authorised and regulated by the Financial Conduct Authority ('FCA'), 12 Endeavour Square, London, E20 1JN, in the conduct of investment business. Registered in England no. 01371973. NIM and NIMNA are both registered as investment advisors with the Securities & Exchange Commission ('SEC') to offer investment advisory services in the United States. NIM's investment business in the United States is described in Form ADV, Part 1 and 2, which can be obtained from the SEC.gov website or obtained upon request. NIMJ is authorised and regulated by the Japan Financial Services Agency (JFSA). All firms are indirect subsidiaries of The Bank of New York Mellon Corporation ('BNY').

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