

MODULE 5, LESSON 1.3 WORKSHEET



Making Your First ETF Investment on InvestEngine

Investing Essentials for Beginners

Key Concepts at a Glance

- **InvestEngine:** A UK investment platform that allows you to buy ETFs and build a portfolio
- **Stocks & Shares ISA:** A tax-efficient account that protects your investments from UK taxes.
- **ETF (Exchange-Traded Fund):** A fund that holds many companies, giving you diversification in a single investment.
- **Core Idea:** Investing becomes simple when you follow a clear process and automate it.

A Simple Example

You open a Stocks & Shares ISA on InvestEngine and deposit £100.

You search for a global ETF, choose the amount you want to invest, and press Invest. Within minutes, you own a small piece of hundreds or even thousands of companies around the world.

By setting up automated deposits and investing regularly, your portfolio can grow steadily over time.

The Basic Investment Steps

1. **Open your account:** Create your InvestEngine account and verify your identity.
2. **Choose the right account type:** For most long-term investors, a Stocks & Shares ISA is the most tax-efficient option.
3. **Add money to your account:** Deposit funds through bank transfer or direct debit.
4. **Find an ETF:** Search for a global ETF such as a world or all-world index fund.
5. **Invest your money:** Add the ETF to your portfolio, choose your allocation, and confirm the purchase.

Take a Moment to Reflect

- Have I opened an investment account before, or would this be my first one?

- Do I understand why a Stocks & Shares ISA is usually the best starting point?

- Would investing in a single global ETF make the process simpler for me?

- How comfortable am I with setting up automated monthly investing?

- Am I prepared to stay invested and focus on long-term growth?

Key Takeaway

Investing doesn't have to be complicated.
The most important step is starting and staying consistent.

What Comes Next?

In the next lesson, we'll look at portfolio maintenance and how to review, rebalance, and stay disciplined as markets move.

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