



Helios Login Guide

January 2023

1. General Information

1.1 Contact details

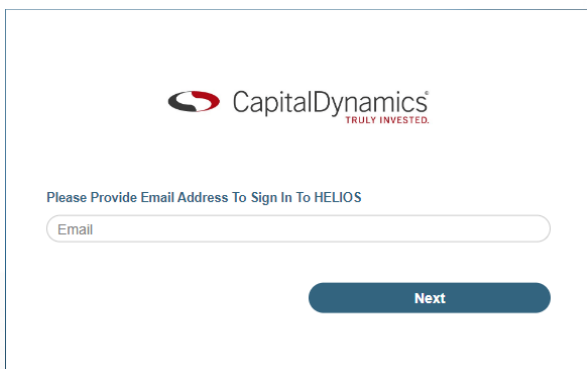
Should you have any questions or want to report any issues or provide feedback on Helios, please email the Client Relations team at clientrelations@capdyn.com. Additional contact details are below.

1.2 Browser

Helios is optimized for most mainstream web browsers, but is best experienced in Google Chrome.

1.3 Logging into Helios

Helios is hosted by Colmore, our fund administrator. Please use this link to obtain access: <https://capdyn-ext.mycolmore.com>. You will be greeted by a login page as shown below:



The login page prompts you for your email address. This will be the email address to which your HELIOS invitation was sent. For existing users, this is your existing email address registered in HELIOS.

Please note that for security purposes, shared (i.e. group) e-mail addresses are not granted Helios access. Shared e-mail addresses can be set up to receive email notifications, in order to provide an alert when a new document has been uploaded to the portal.

If your email account is connected to a Microsoft Personal Account (for example, Office 365) you can log in to HELIOS using your own personal details, including your password.

If your email domain is managed by your organization and is federated with Azure AD, you can log in using your organization details, including your network/account password from your organization. You will likely see your company logo on the login/agreement page.

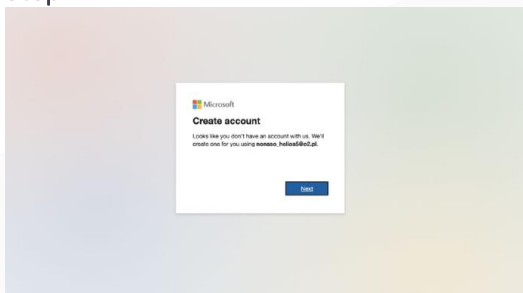
Following the entry of your email address, HELIOS will guide you through a number of steps before you access your data and documents. As mentioned above, this can vary depending on your email account type as detailed in the following pages.

Upon logging in to Helios, the full User Guide will then be available to view and download in the 'Documents' section.

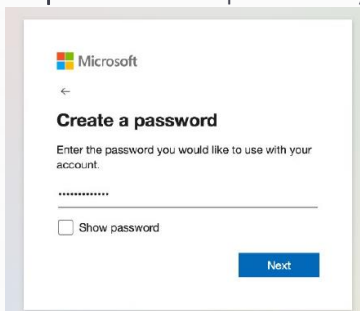
If your email is related to accounts other than those described above, you may need to follow some, if not all, of the following steps:

Step 1. Visit your HELIOS address: <https://capdyn-ext.myclomore.com>. Once you have entered your email address and clicked *Next* you will be redirected to create Microsoft Personal Account process.

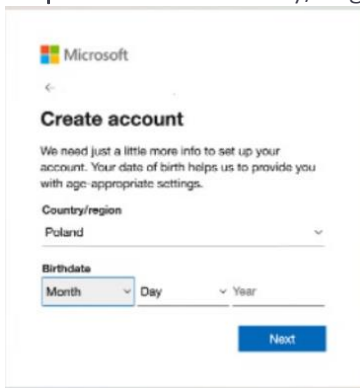
Step 2. Click *Next*.



Step 3. Enter the password you would like to use and click *Next*.



Step 4. Provide Country/Region, Birthdate and click *Next*.



Microsoft

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Create account

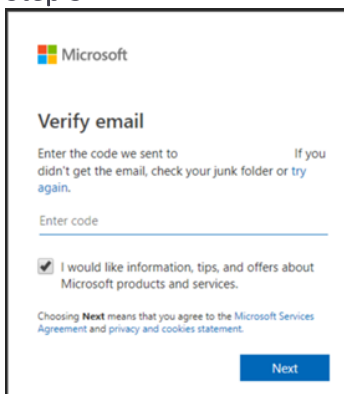
We need just a little more info to set up your account. Your date of birth helps us to provide you with age-appropriate settings.

Country/region
Poland

Birthdate
Month Day Year

Next

Step 5. Enter the code sent to your email and click *Next*.



Microsoft

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Verify email

Enter the code we sent to If you didn't get the email, check your junk folder or try again.

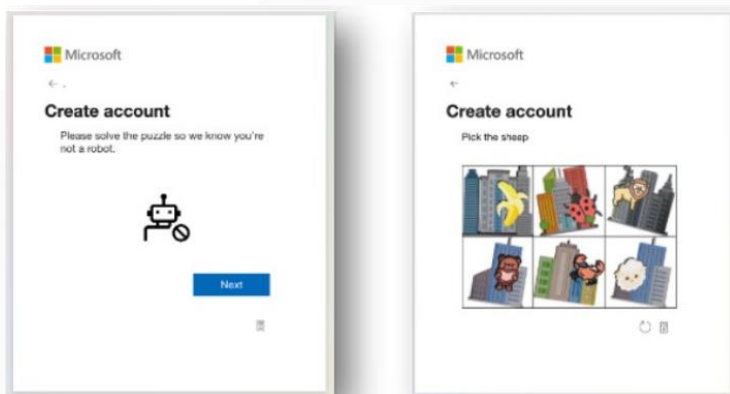
Enter code

☒ I would like information, tips, and offers about Microsoft products and services.

Choosing **Next** means that you agree to the [Microsoft Services Agreement](#) and [privacy and cookies statement](#).

Next

Step 6. Once the Create Account page opens, click *Next*, and solve the puzzle.



Microsoft

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Create account

Please solve the puzzle so we know you're not a robot.

Next

Microsoft

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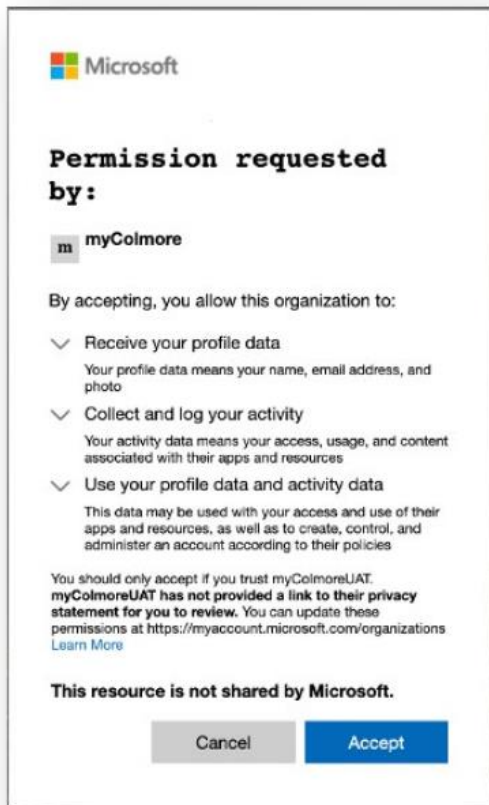
Create account

Pick the sheep.

Next

Step 7. Accept tenant permission by clicking *Accept*. If you are a new user of HELIOS you will need to select the 'I have read terms and conditions' checkbox and click *Accept*.

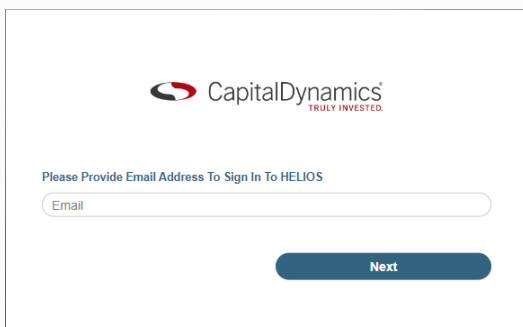
If you have logged into the previous version of HELIOS before, this step won't be necessary.



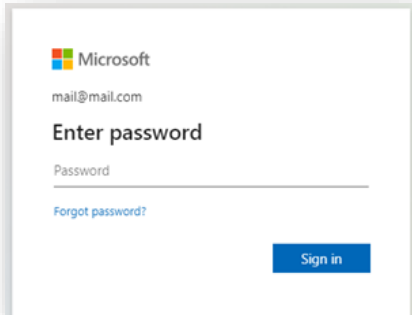
You will then be logged into HELIOS.

1.4 Accessing HELIOS if you have forgotten your password

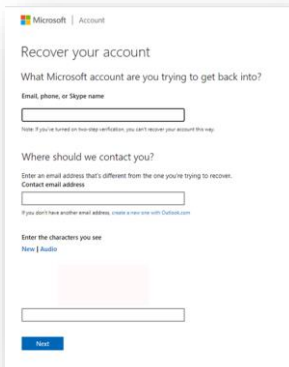
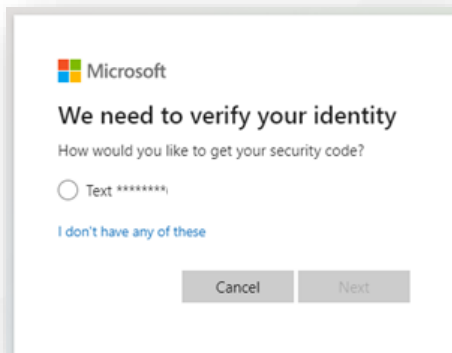
If the email account you use with HELIOS is connected to a Microsoft Personal Account (for example, Office 365) you can retrieve or reset your password through Outlook online, or through the “Forgot password” link following the entry of your email address on the HELIOS front page:

A screenshot of the HELIOS login page. At the top is the CapitalDynamics logo. Below it, the text "Please Provide Email Address To Sign In To HELIOS" is followed by a text input field labeled "Email". Below the input field is a blue button labeled "Next".

At this point, you will likely be redirected to a password entry screen:

A Microsoft login screen with the Microsoft logo at the top left. Below it is the email address 'mail@mail.com'. The main heading is 'Enter password'. There is a password input field with the placeholder text 'Password'. Below the input field is a link that says 'Forgot password?'. At the bottom right is a blue button that says 'Sign in'.

From here, click “Forgot password?” and you will be directed to password recovery screens. Follow the steps to recover/reset your password. This will be dependent on the settings applied by yourself, or your email administrator, upon setup of your email account.

A Microsoft account recovery screen. At the top, it says 'Microsoft | Account'. The heading is 'Recover your account'. Below that is the question 'What Microsoft account are you trying to get back into?'. There is an input field for 'Email, phone, or Skype name'. A note below says 'Note: If you're locked to two-step verification, you can't recover your account this way.' The next question is 'Where should we contact you?'. There is an input field for 'Enter an email address that's different from the one you're trying to recover.' and a label 'Contact email address'. A link below says 'If you don't have another email address, learn more here with Outlook.com'. At the bottom, there is an input field for 'Enter the characters you see' and a link 'Here | Audio'. A blue 'Next' button is at the bottom right.A Microsoft identity verification screen. At the top, it says 'Microsoft'. The heading is 'We need to verify your identity'. Below that is the question 'How would you like to get your security code?'. There is a radio button next to the text 'Text *****'. Below that is a link that says 'I don't have any of these'. At the bottom are two buttons: 'Cancel' and 'Next'.

If your email domain is managed by your organization and is federated with Azure AD, your password will need to be recovered/reset in line with your organization’s policies and procedures. Please contact your network administrator if you are unsure of the steps required.

2. For further information, please contact:

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