POEMS Mobile 2.0
User Guide

Scan the QR code to download the app

Download on Google play

Download on the App Store
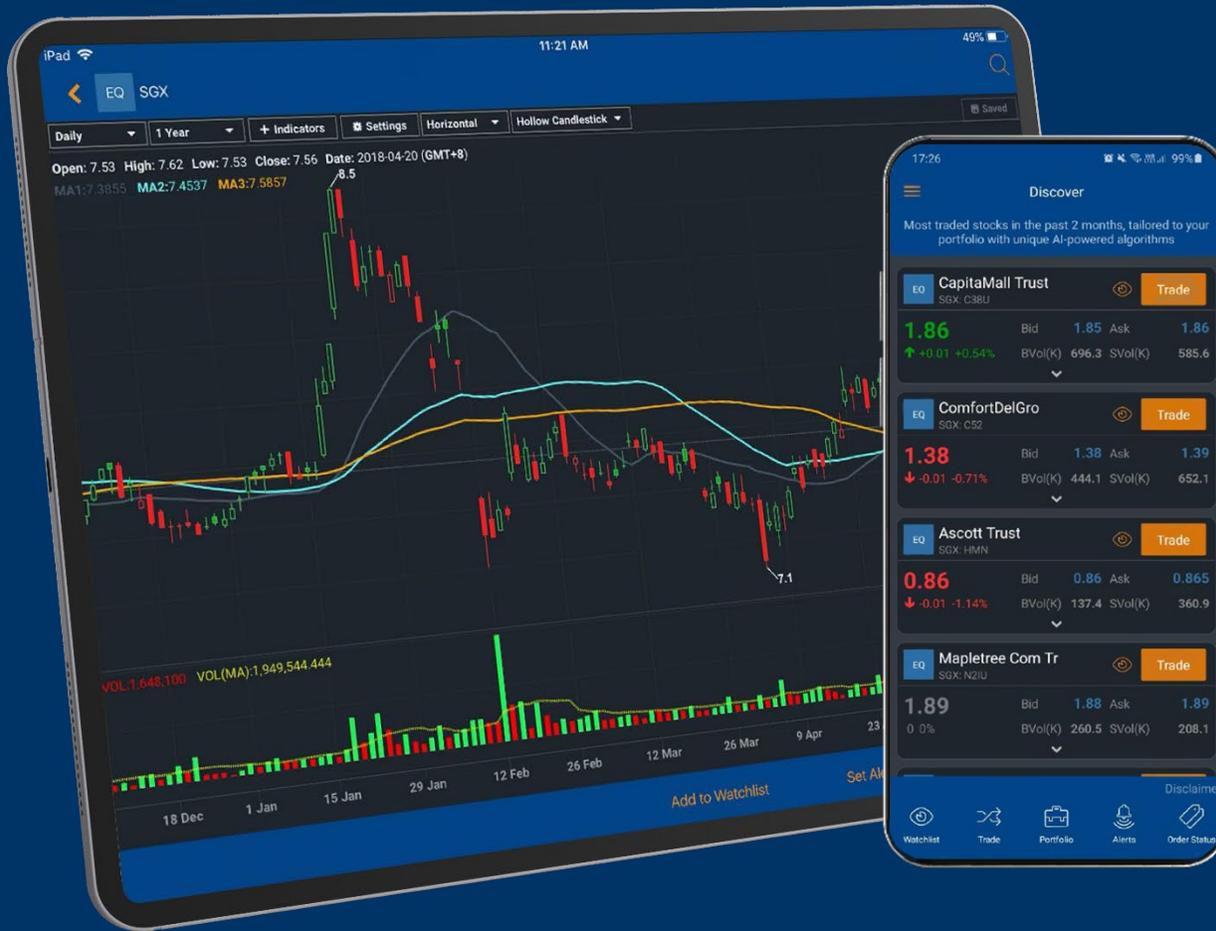
DISCLAIMERS ON THE USE OF THIS USER GUIDE

The information contained in this presentation has been obtained from public sources which PSPL has no reason to believe are unreliable and any analysis, forecasts, projections expectations and opinions (collectively the "Research") contained in this presentation are based on such information and are expressions of belief only. PSPL has not verified this information and no representation or warranty, express or implied, is made that such information or Research is accurate, complete or verified or should be relied upon as such. Any such information or Research contained in this presentation is subject to change, and PSPL shall not have any responsibility to maintain the information or Research made available or to supply any corrections, updates or releases in connection therewith. In no event will PSPL be liable for any special, indirect, incidental or consequential damages which may be incurred from the use of the information or Research made available, even if it has been advised of the possibility of such damages.

You may wish to seek advice from a financial adviser before investing in any of the products mentioned. In the event that you choose not to seek advice from a financial adviser, you should consider whether the investment product is suitable for you.
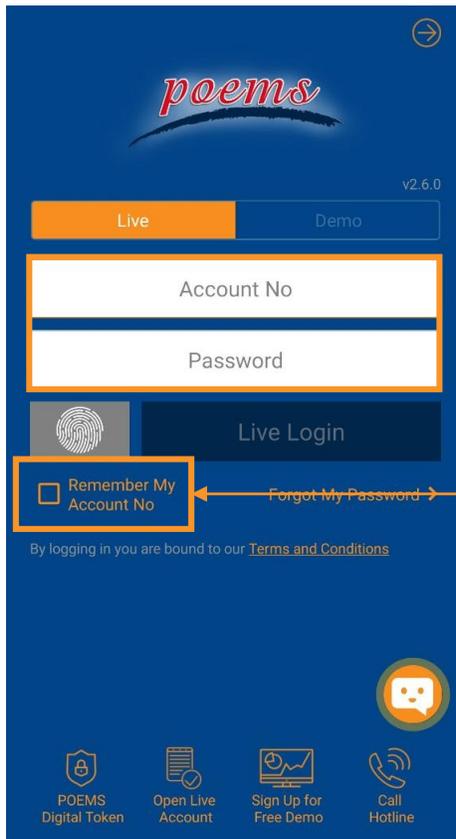
CONTENTS

SYSTEMS REQUIREMENT
For iPhone/iPad (iOS 8.0 or later)
For Android smartphones/tablets (Android 4.0 or later)

GETTING STARTED

Logging in to POEMS Mobile 2.0

METHOD 1:

Step 1: Launch the POEMS SG 2.0 mobile app
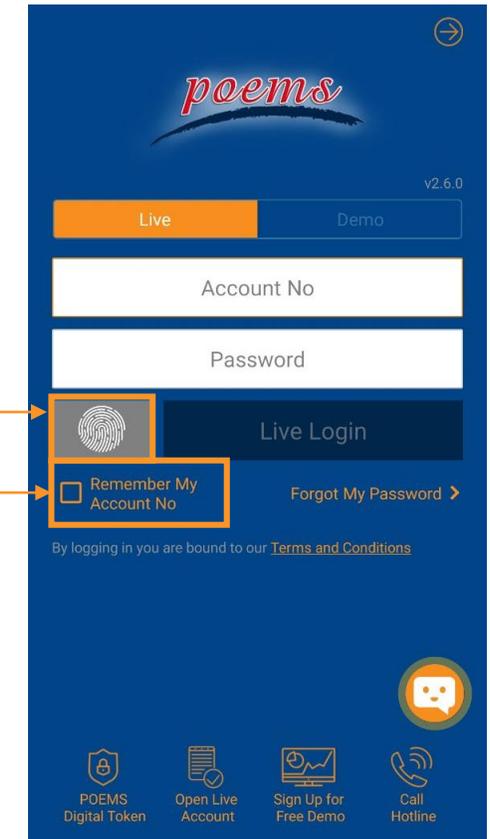
Step 2: Key in your login details and tap on **Live Login**

METHOD 2:

Step 1: Launch the POEMS SG 2.0 mobile app

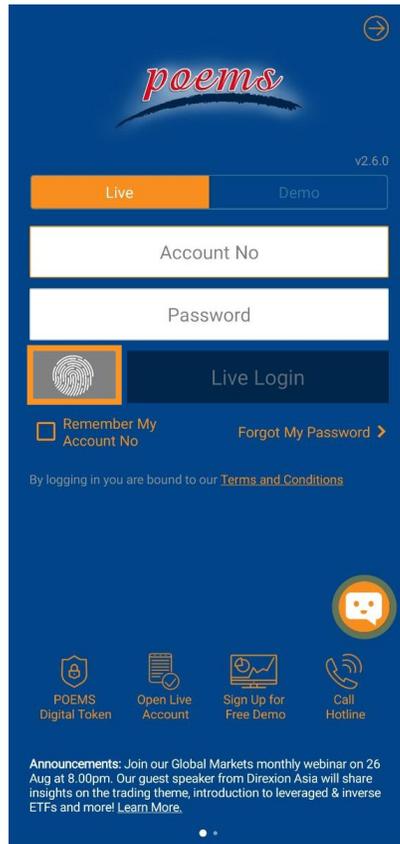**Step 2:** Tap on **POEMS Touch ID*** for a seamless login experience

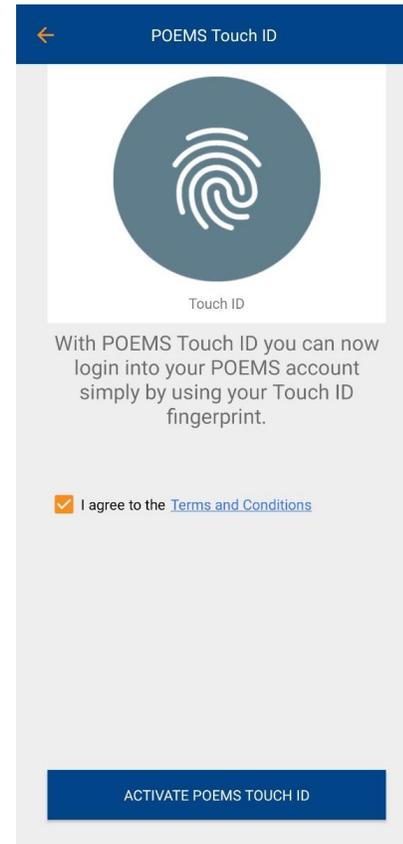**Refer to slide 6 to learn how to activate POEMS Touch ID*

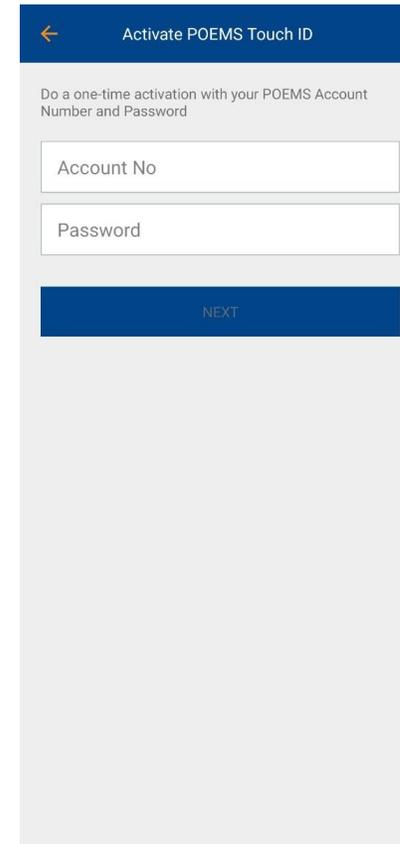Check this box if you would like the app to remember your account number
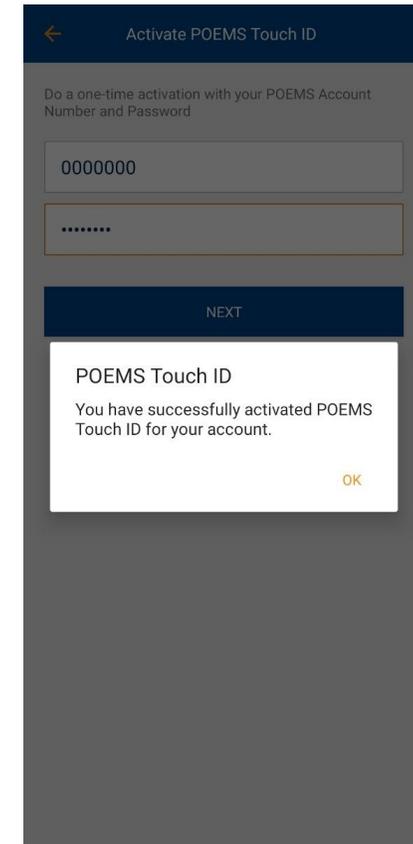
6

Activate POEMS Touch ID

Step 1: Launch the POEMS SG 2.0 mobile app and tap on **POEMS Touch ID**

Step 2: Tick the T&Cs box and tap on **ACTIVATE POEMS TOUCH ID**

Step 3: Enter your account details and select **NEXT**

Step 4: Upon successful activation, you will receive the above pop-up message

GETTING STARTED

Overview

a. Hamburger bar
b. Shortcut bar
c. List of modules available on POEMS Mobile 2.0

Menu:
- Watchlist
- Trade
- Order Status
- Alerts
- Discover
- Top Movers
- News
- Economic Calendar
- Account Management
  - Portfolio
  - Live Positions Beta
  - Outstanding Positions
  - Transaction History
  - Online Forms
  - UT Basket
  - Regular Savings Plan
  - FX Invest
- Settings
- Help
- Logout

SG Watchlist

+Add Instrument to Watchlist — All

	Name	Last /Ind.NAV	Change	Bid
EQ	UOB SGX	19.92	-	19.91
EQ	SIA SGX	3.69	+0.05	3.68
EQ	SingTel SGX	2.29	+0.01	2.29
EQ	CapitaMall Trust SGX	1.89	+0.04	1.88
EQ	HongkongLand USD SGX	3.86	-	3.85
EQ	NetLink NBN Tr SGX	0.965	-0.005	0.965
EQ	Mapletree Com Tr SGX	1.93	+0.03	1.92
EQ	OCBC Bank SGX	8.62	-0.05	8.62
EQ	QAF SGX	0.935	+0.025	0.93
EQ	Silverlake Axis SGX	0.3	-	0.295
EQ	DBS SGX	20.75	+0.02	20.74
	Yoma Strategic			

All live prices unless marked *(15-30 mins delay).

Watchlist | Trade | Portfolio | Alerts | Order Status

HOW TO MONITOR THE MARKET
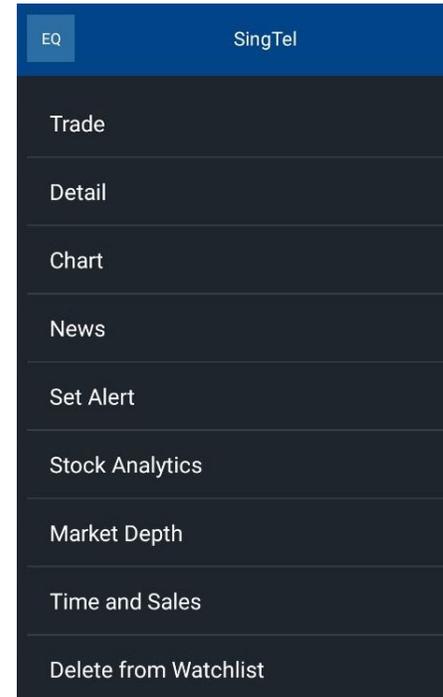
Watchlist

Watchlists are synchronized with POEMS 2.0

a. Search counters by instrument name or symbol to add to watchlist

b. Switch between different watchlists (maximum 10 watchlists)

c. Change watchlist display to grid or list view

d. Add/remove and rearrange columns and counter orders here

e. Filter by different asset classes

f. Movable panel (scroll left and right to view more information)

g. Tap and hold on any counter to open Contextual Menu

h. Tap on bid/ask price to open Trade Ticket

i. Tap on any counter to open Details Screen
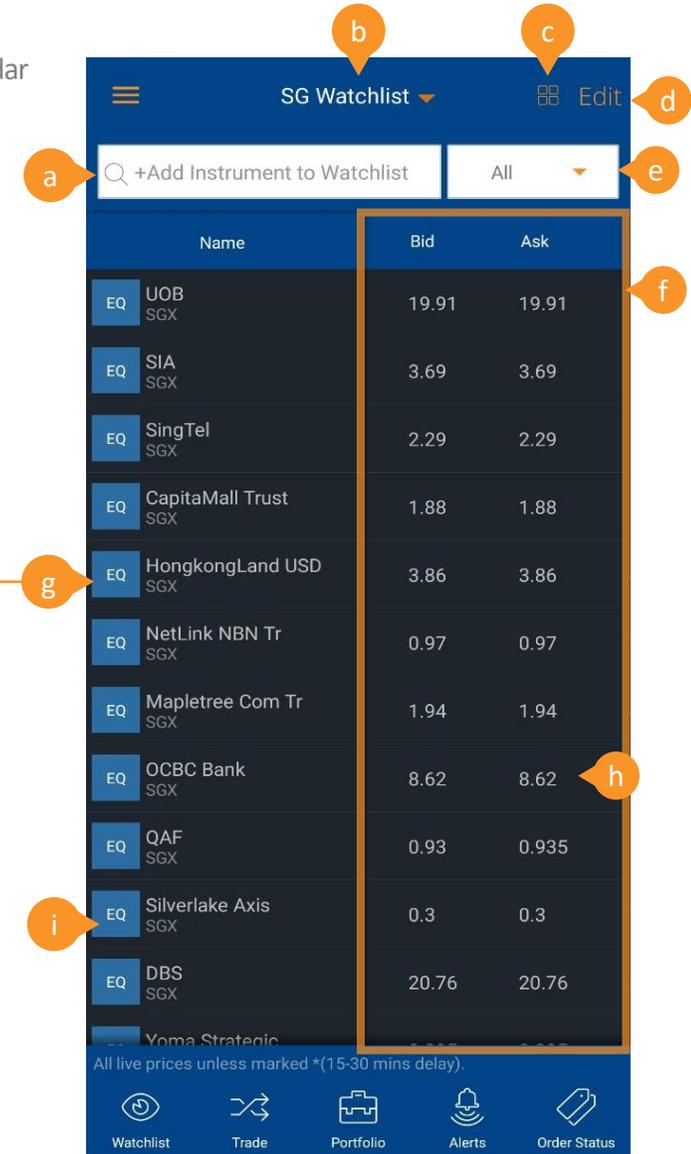
j. Tilt phone horizontally to view in landscape mode

HOW TO MONITOR THE MARKET

Watchlist | Details | Chart | Top Movers | Market Depth | Time and Sales | Stock Analytics | News | Alerts | Discover | Economic Calendar

Watchlist (Adding Counters)

Four methods to add counters to your Watchlists

METHOD 1: Using the Basic Search Function

Step 1: Go to Watchlist

Step 2: Use the **Basic Search Function** to search for your desired counter (a list of suggested counters will be shown)

Step 3: Tap on your desired counter to add to your selected watchlist

METHOD 2: Using Details Screen*

Step 1: Tap on your desired counter to open Details Screen
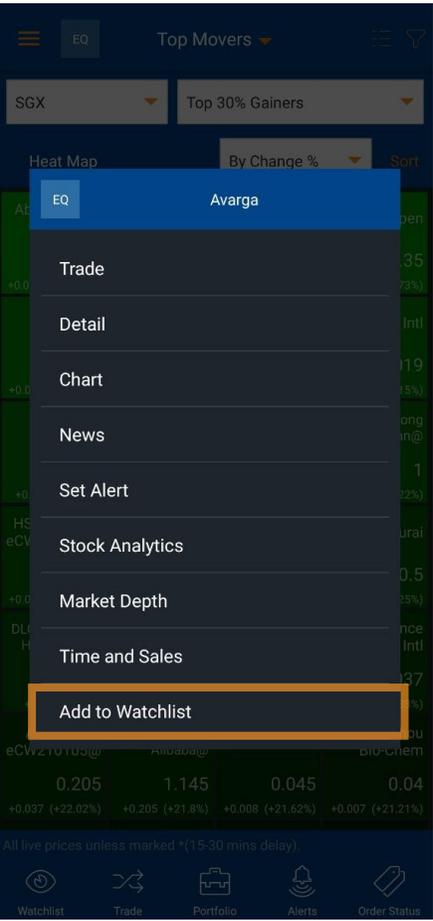
Step 2: Tap on **Add to Watchlist**

HOW TO MONITOR THE MARKET

Watchlist | Details | Chart | Top Movers | Market Depth | Time and Sales | Stock Analytics | News | Alerts | Discover | Economic Calendar

Watchlist (Adding Counters)
Four methods to add counters to your Watchlists

METHOD 3: Using Contextual Menu*

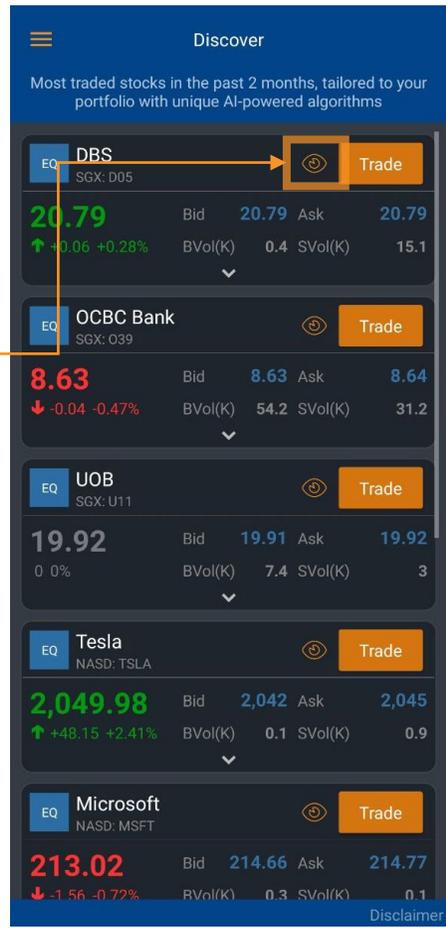**Step 1:** Tap and hold on your desired counter to open Contextual Menu

Step 2: Select **Add to Watchlist**

METHOD 4: Using the Discover module

Step 1: Tap on the hamburger menu and select **Discover**

Step 2: Tap on the watchlist button

Step 3: Select the watchlist you wish to add the counter to

HOW TO MONITOR THE MARKET

Watchlist | **Details** | Chart | Top Movers | Market Depth | Time and Sales | Stock Analytics | News | Alerts | Discover | Economic Calendar
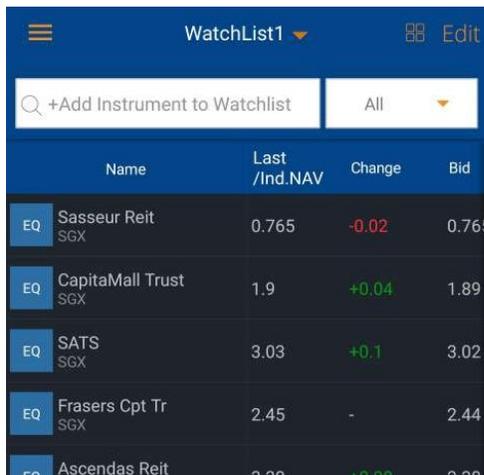
Details (Equity)

View details of a counter including its bid and ask price, volume and real-time stock chart

How to open Details Screen

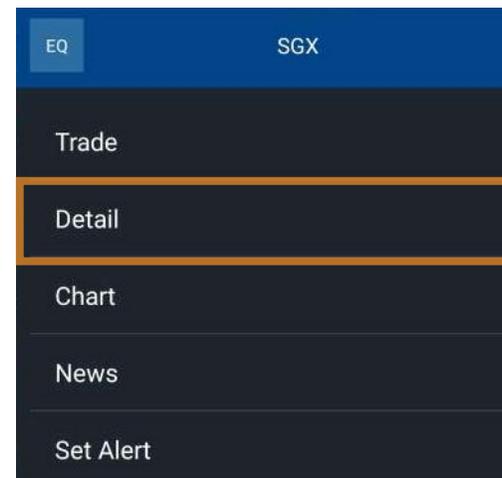### METHOD 1: Using Watchlist or Top Movers

Step 1: Tap on your desired counter from your watchlist or Top Movers module to open Details Screen

METHOD 2: Using Contextual Menu*

**Step 1:** Tap and hold on your desired counter to open Contextual Menu
Step 2: Select **Detail**

Swipe to find:

›› Details
›› News
›› Market Depth
›› Time and Sales
›› Stock Analytics

a. Tap to search for other counters
b. "CPF Key" indicates that this counter is a CPF trustee stock
c. Tap to view Advanced Charting for counter
d. Tap on Trade to open Trade Ticket
e. Tap to set price alert for counter
f. Tap to add counter to your watchlist
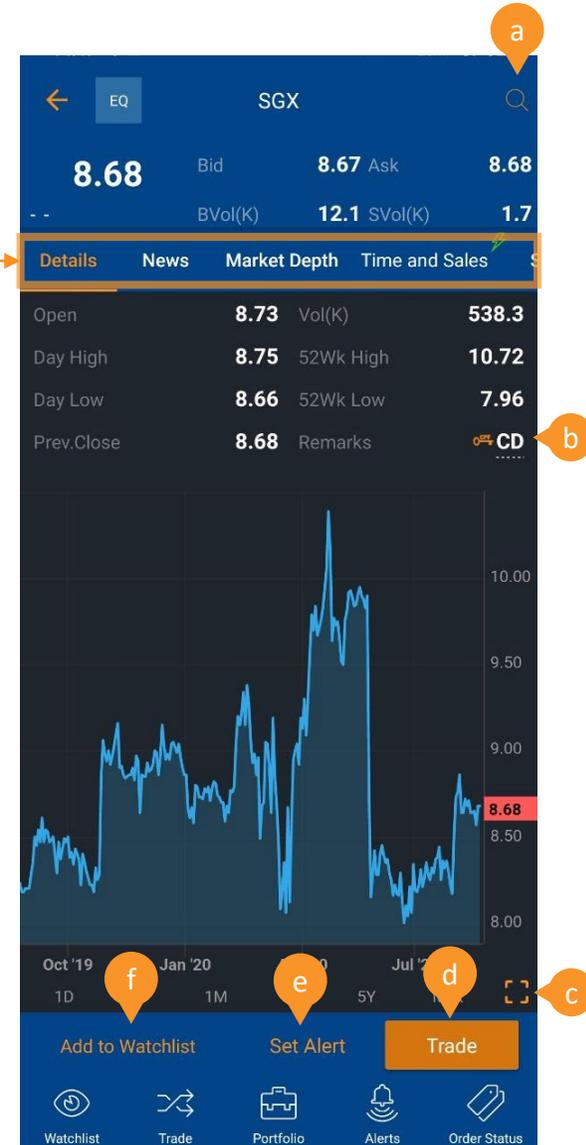
HOW TO MONITOR THE MARKET

Watchlist | **Details** | Chart | Top Movers | Market Depth | Time and Sales | Stock Analytics | News | Alerts | Discover | Economic Calendar

Details (Unit Trust)

View details of a fund

Swipe to find:

›› General Info
›› Performance
›› Documents
›› Regular Savings Plan
›› Fund Manager Info

a.   Scroll up and down to see various details of the selected fund
b.   Tap to search for other counters
c.   Tap to view Advanced Charting for the fund
d.   Tap on BUY NOW to purchase fund
e.   Tap to set price alert for fund
f.   Tap to add fund to watchlist
g.   Tap to search for funds to compare with
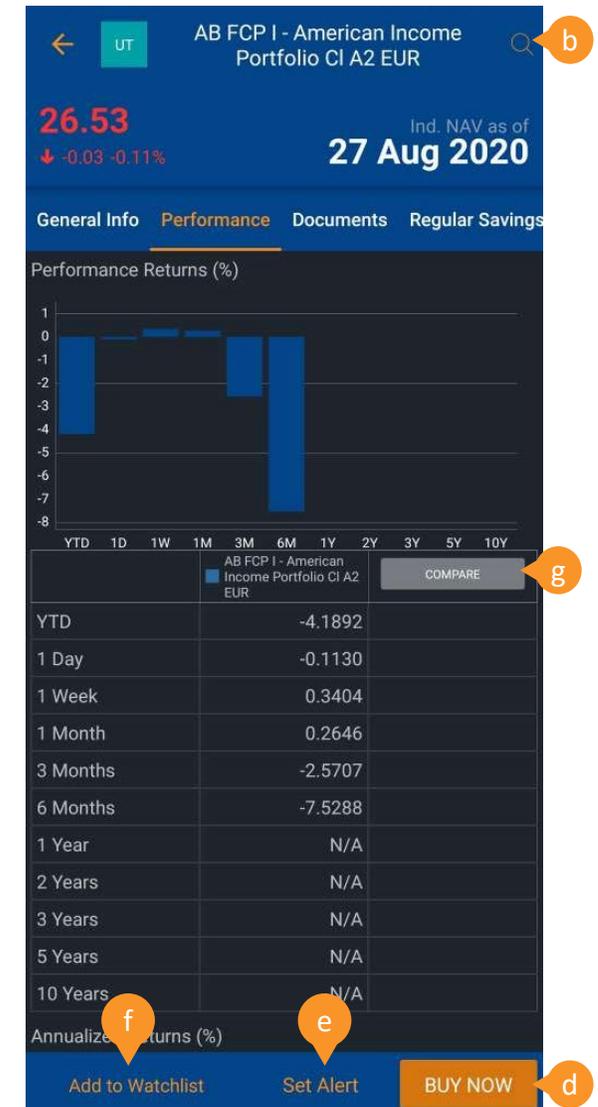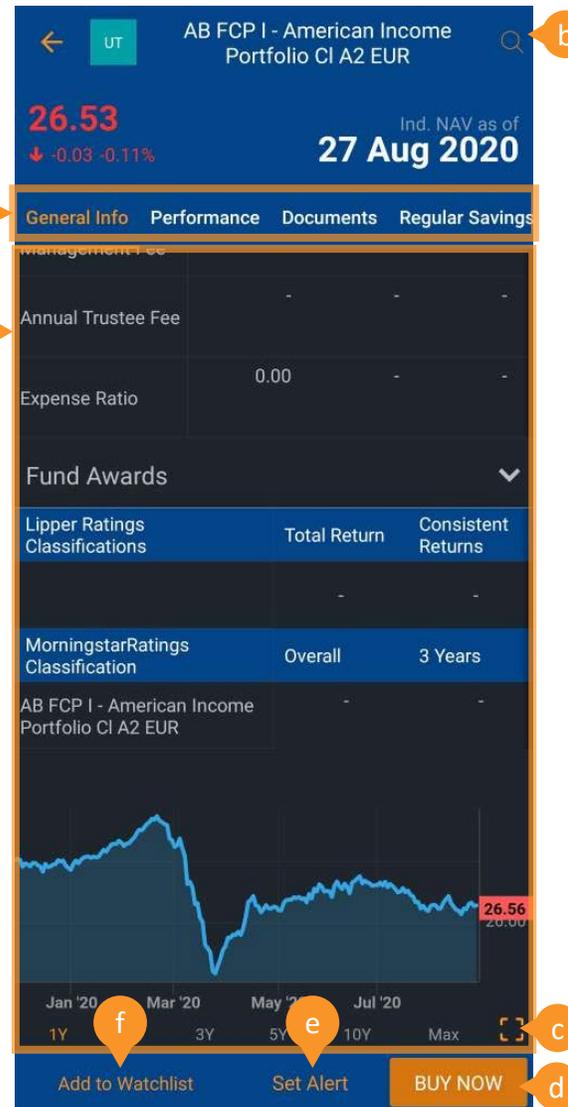
13

HOW TO MONITOR THE MARKET

Watchlist | **Details** | Chart | Top Movers | Market Depth | Time and Sales | Stock Analytics | News | Alerts | Discover | Economic Calendar
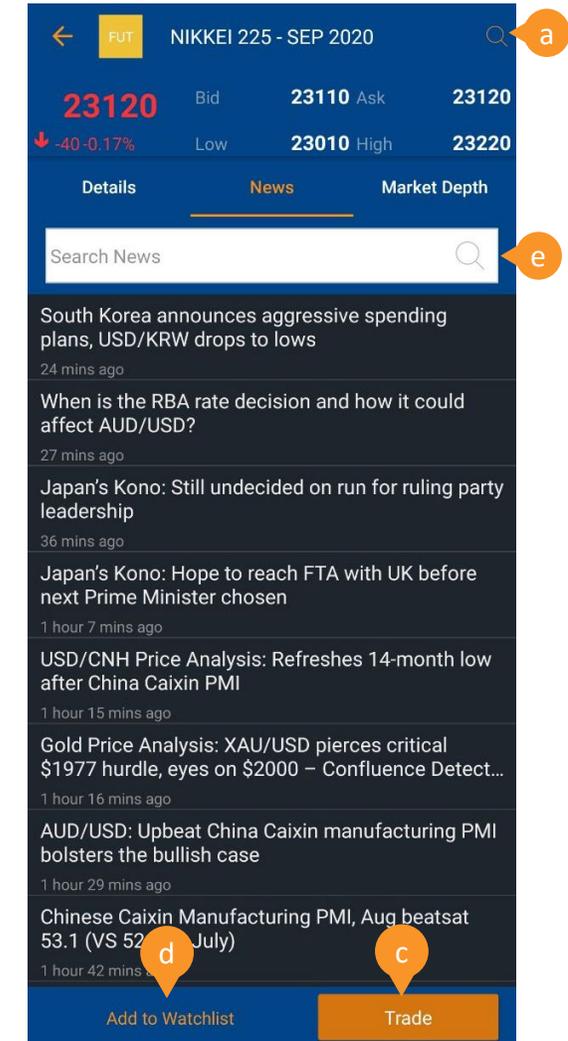
Details (Futures)

View details of a FT counter

Swipe to find:

›› Details

›› News

›› Market Depth

a. Tap to search for other counters

b. Tap to view Advanced Charting for FT product

c. Tap on Trade to trade FT product

d. Tap to add FT product to watchlist

e. Search for news related to selected FX product

HOW TO MONITOR THE MARKET

Watchlist | **Details** | Chart | Top Movers | Market Depth | Time and Sales | Stock Analytics | News | Alerts | Discover | Economic Calendar

Details (Forex)
View details of a FX counter

a. Tap to search for other counters

b. Tap to view Advanced Charting for FX product

c. Tap on Trade to trade FX product

d. Tap to add FX product to watchlist
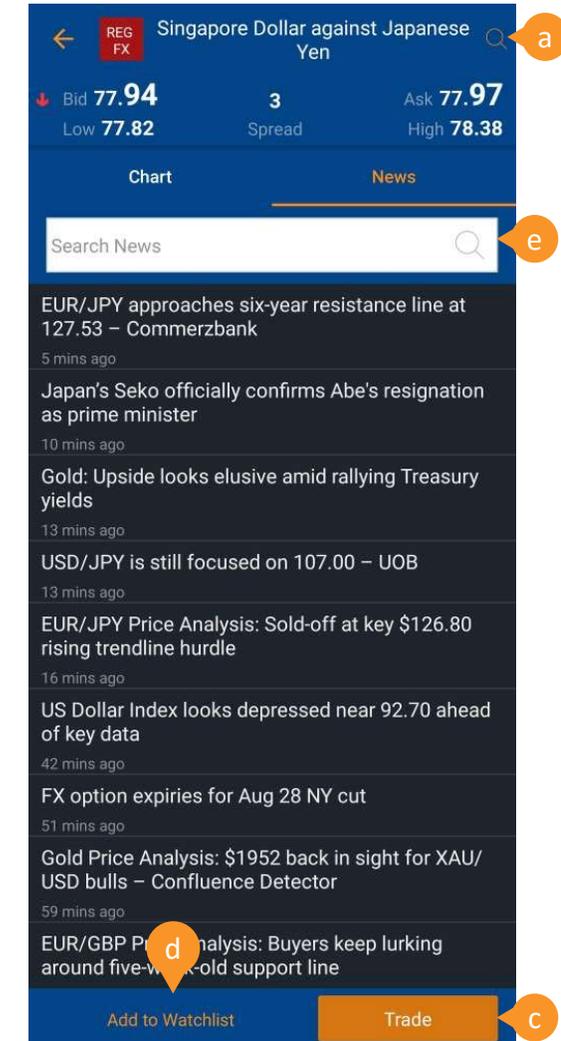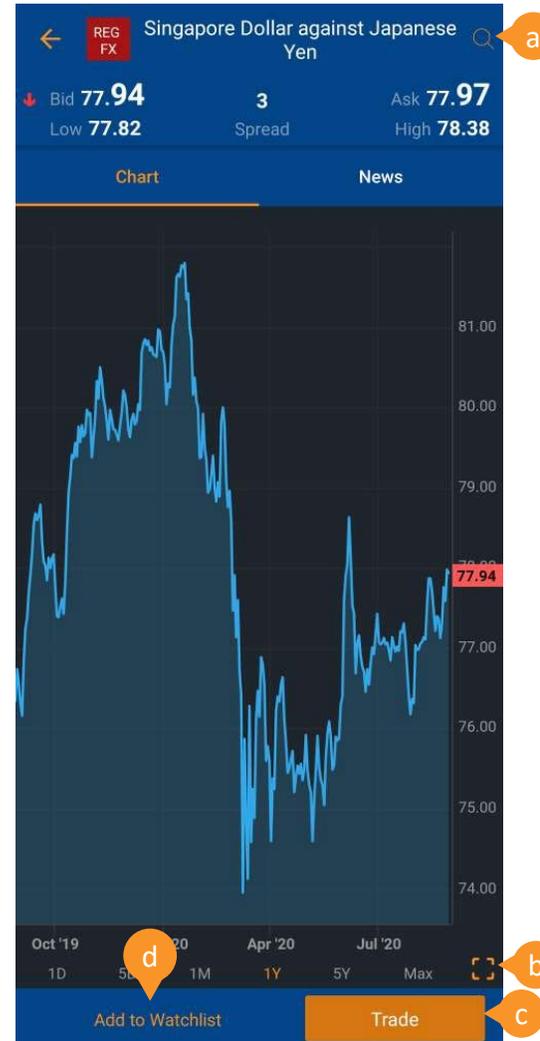
e. Search for news related to selected FX product

15

HOW TO MONITOR THE MARKET

Watchlist | Details | **Chart** | Top Movers | Market Depth | Time and Sales | Stock Analytics | News | Alerts | Discover | Economic Calendar

Chart

Real-time streaming charts, customizable settings and technical indicators

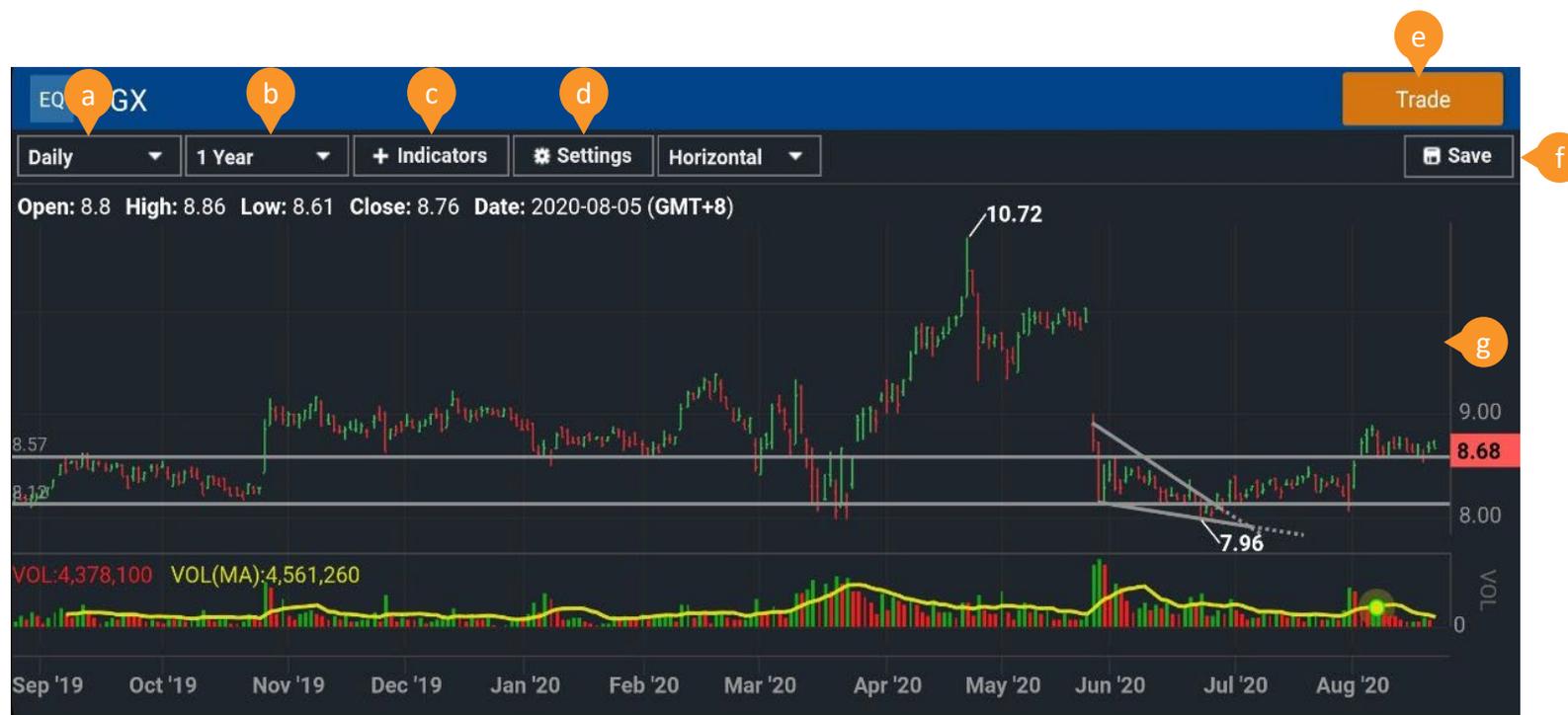**How to open a Chart**

METHOD 1: Using Contextual Menu

Step 1: Tap and hold on your desired counter to open Contextual Menu*
Step 2: Select **Chart**

METHOD 2: Using Details Screen*

Step 1: Tap on your desired counter to open Details Screen
Step 2: Tap on **expand icon** to show full chart in landscape view

a. Change cycle   b. Change time period   c. Add indicators   d. Change chart settings

e. Tap on Trade to open Trade Ticket   f. Save chart settings   g. Swipe from right to left to pan chart

HOW TO MONITOR THE MARKET

Watchlist | Details | Chart | **Top Movers** | Market Depth | Time and Sales | Stock Analytics | News | Alerts | Discover | Economic Calendar

Top Movers

View the Top Gaining and Most Active Stocks (Counters and funds are organised from Bullish to Bearish)

How to get to Top Movers

Step 1: Tap on the hamburger menu

Step 2: Select **Top Movers**
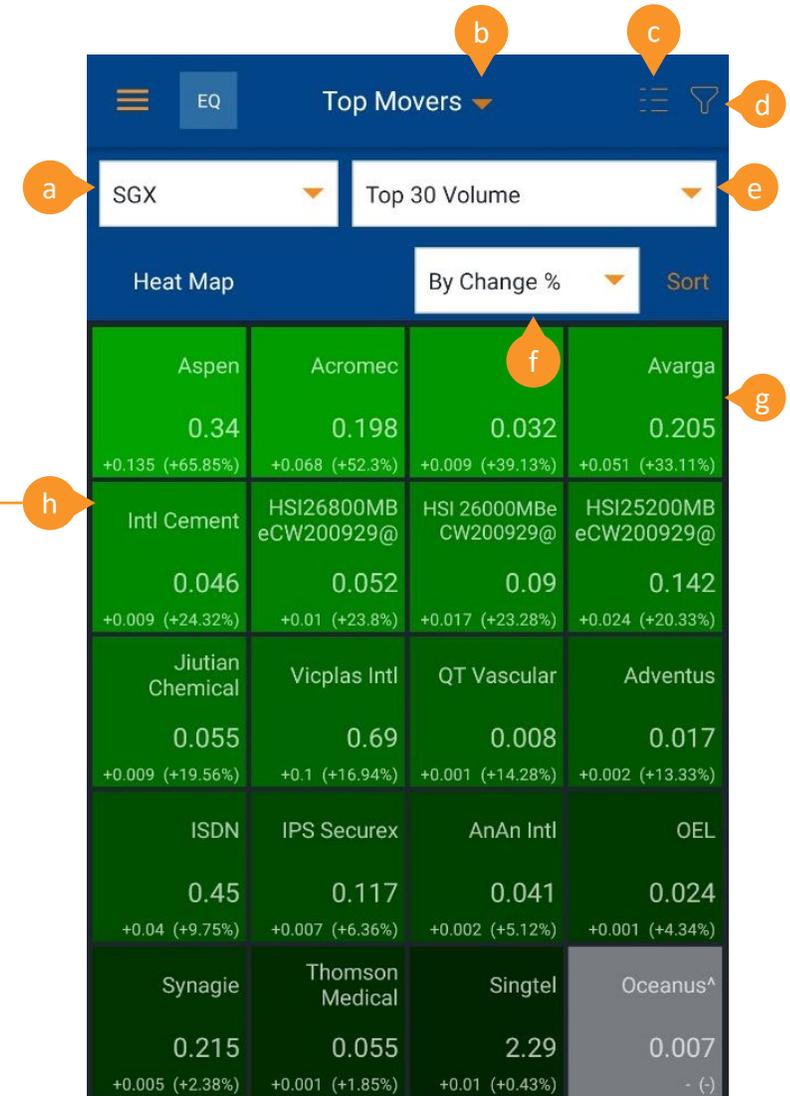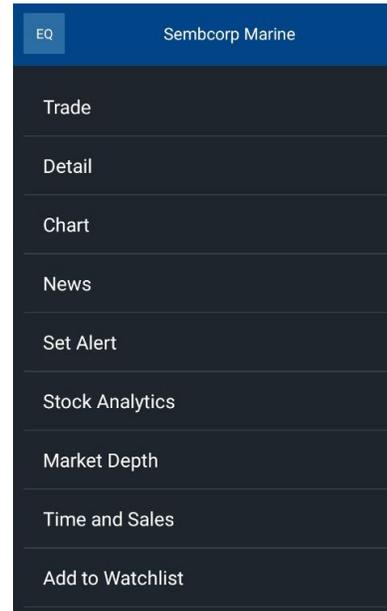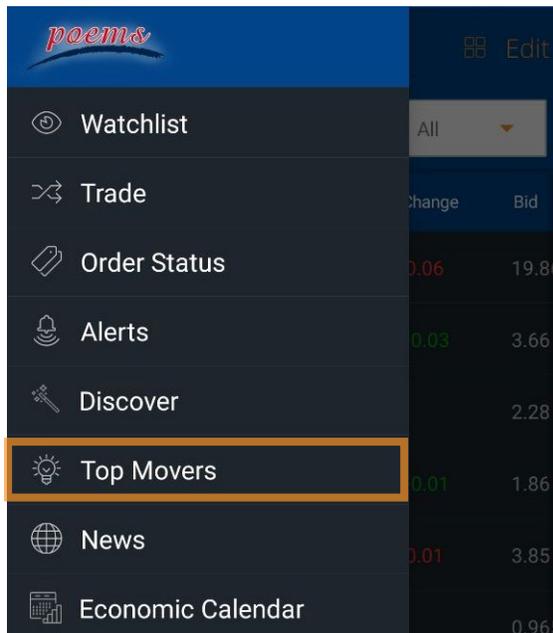
a. Filter stocks by stock exchange

b. Switch between Equities or Unit Trust

c. Change Top Movers display to heatmap or list view

d. Filter stocks by instrument

e. Filter by top movers, market indices or STI Components

f. Add additional criteria such as change or change %

g. Tap on any counter to go to Details Screen

h. Tap and hold on any counter to open Contextual Menu

HOW TO MONITOR THE MARKET

Watchlist | Details | Chart | Top Movers | **Market Depth** | Time and Sales | Stock Analytics | News | Alerts | Discover | Economic Calendar
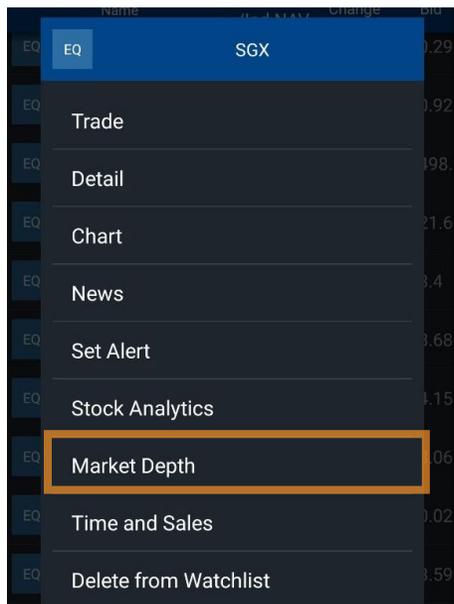
Market Depth

View a total list of the available SGX and HKEx buy/sell prices in the queue

How to get to Market Depth

METHOD 1: Using Contextual Menu*

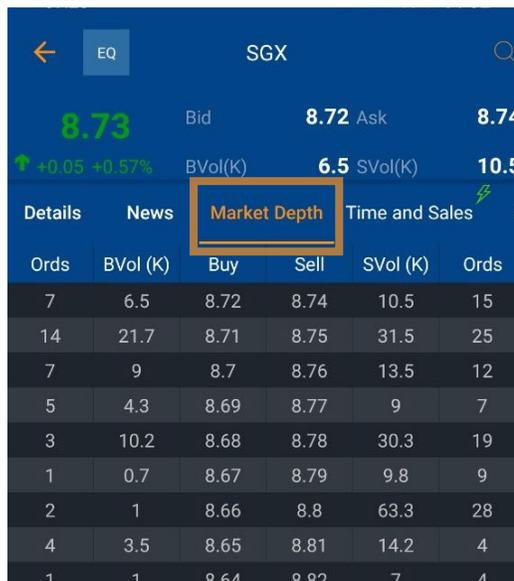**Step 1:** Tap and hold on your desired counter to open Contextual Menu

Step 2: Select **Market Depth**

METHOD 2: Using Details Screen*

Step 1: Tap on your desired counter to open Details Screen

Step 2: Select **Market Depth**

a. Number of Buy and Sell Orders that totaled up volume at each price level**

b. Buy volumes at different prices levels

c. Sell volumes at different prices levels

HOW TO MONITOR THE MARKET

Watchlist | Details | Chart | Top Movers | Market Depth | **Time and Sales** | Stock Analytics | News | Alerts | Discover | Economic Calendar
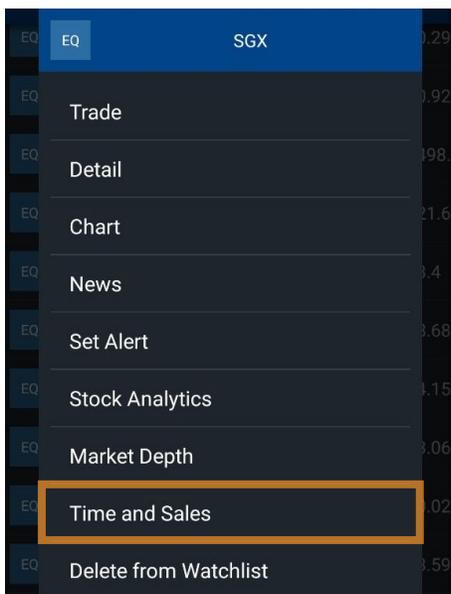
Time and Sales

View time and sales data of specific counters

How to get to Time and Sales

METHOD 1: Using Contextual Menu*

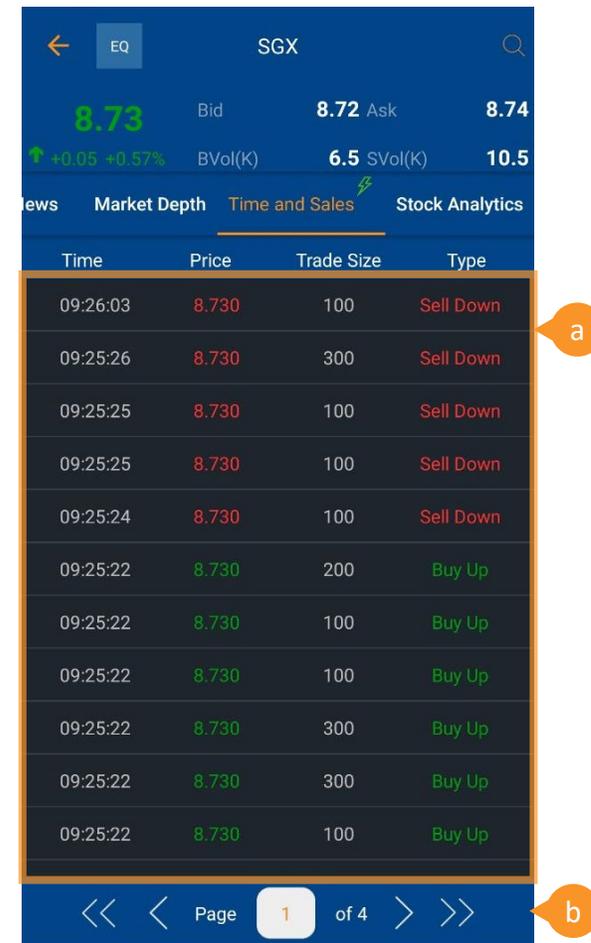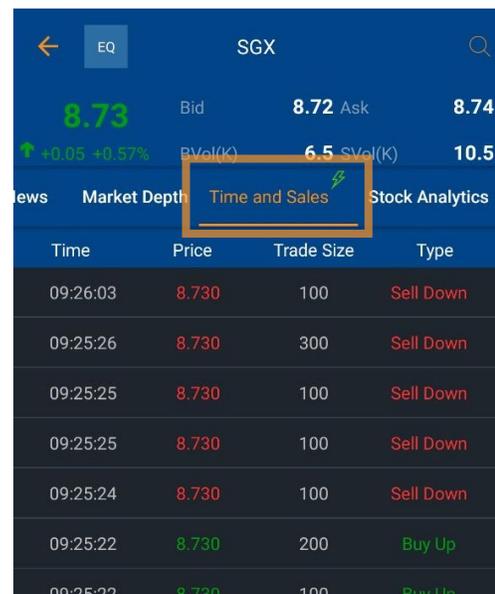**Step 1:** Tap and hold on your desired counter to open Contextual Menu

Step 2: Select **Time and Sales**

METHOD 2: Using Details Screen*

Step 1: Tap on your desired counter to open Details Screen

Step 2: Select **Time and Sales**

a. Scroll down to view recent Time and Sales information

b. Tap on arrows to browse past Time and Sales information

HOW TO MONITOR THE MARKET

Watchlist | Details | Chart | Top Movers | Market Depth | Time and Sales | **Stock Analytics** | News | Alerts | Discover | Economic Calendar
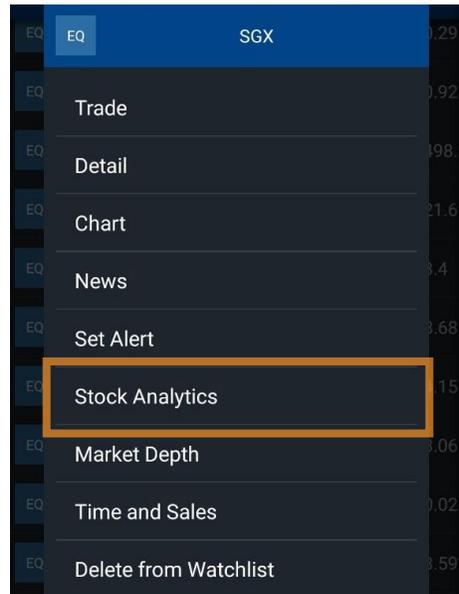
Stock Analytics

Phillip Stock Analytics gives you insights to listed companies' fundamental, valuations and operating performance

How to get to Stock Analytics

METHOD 1: Using Contextual Menu*

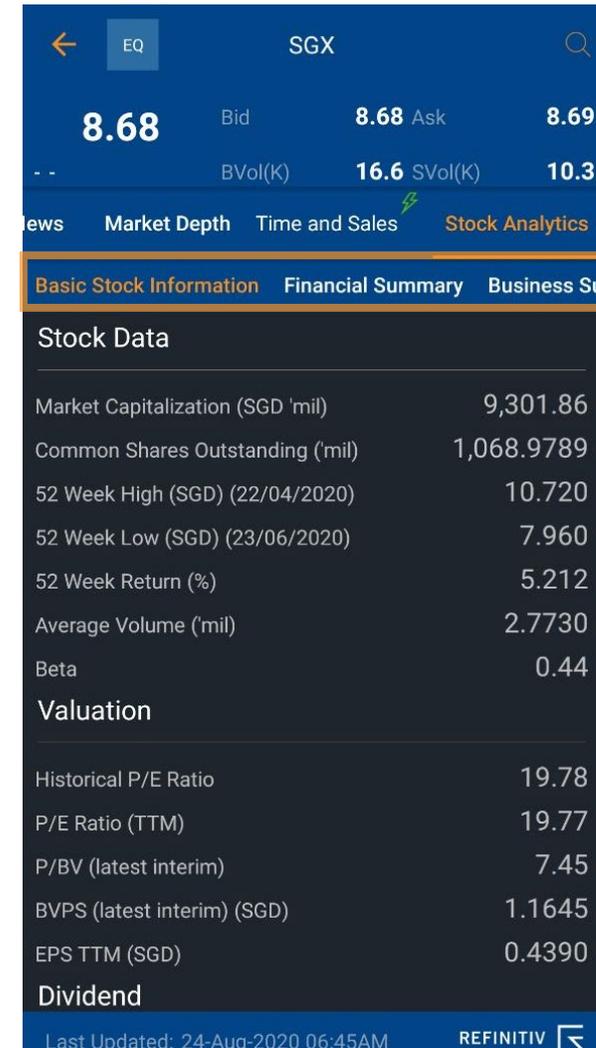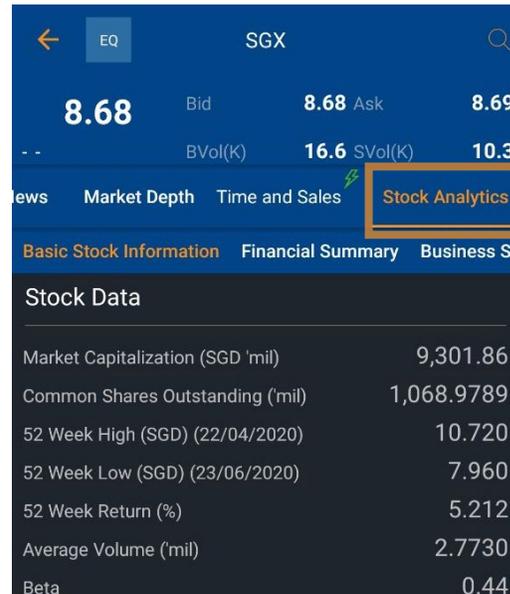**Step 1:** Tap and hold on your desired counter to open Contextual Menu
Step 2: Select **Stock Analytics**

METHOD 2: Using Details Screen*

Step 1: Tap on your desired counter to open Details Screen
Step 2: Select **Stock Analytics**

Swipe to find:

›› Basic Stock Information
›› Financial Summary
›› Business Summary
›› Analysts Estimates

HOW TO MONITOR THE MARKET

Watchlist | Details | Chart | Top Movers | Market Depth | Time and Sales | Stock Analytics | **News** | Alerts | Discover | Economic Calendar
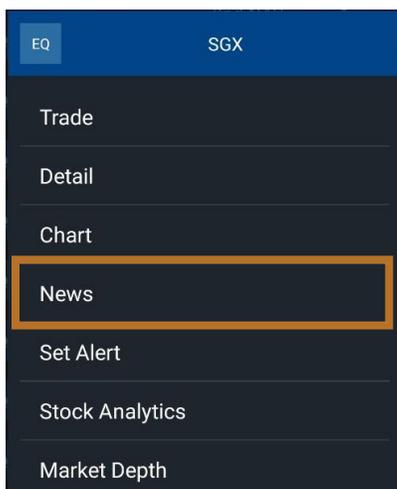
News

Stay up to date with news aggregated from various news sources and research reports by our in-house experts

How to get to News

METHOD 1: Using Contextual Menu*

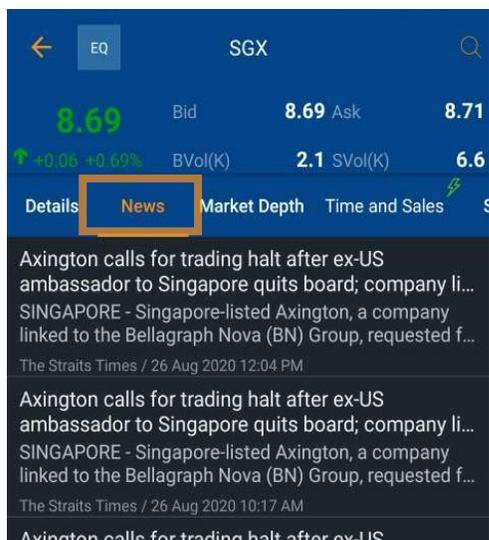**Step 1:** Tap and hold on your desired counter to open Contextual Menu
Step 2: Select **News** to view news related to selected counter

METHOD 2: Using Details Screen*

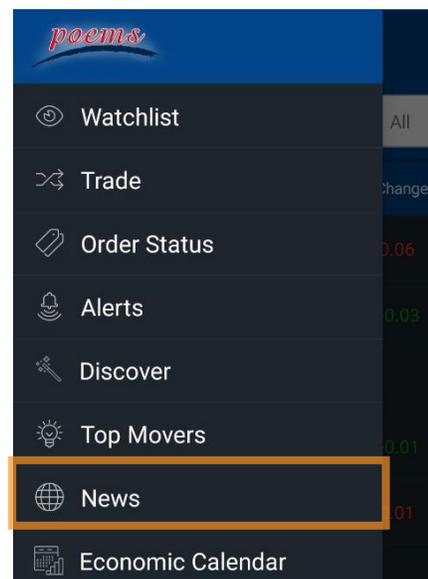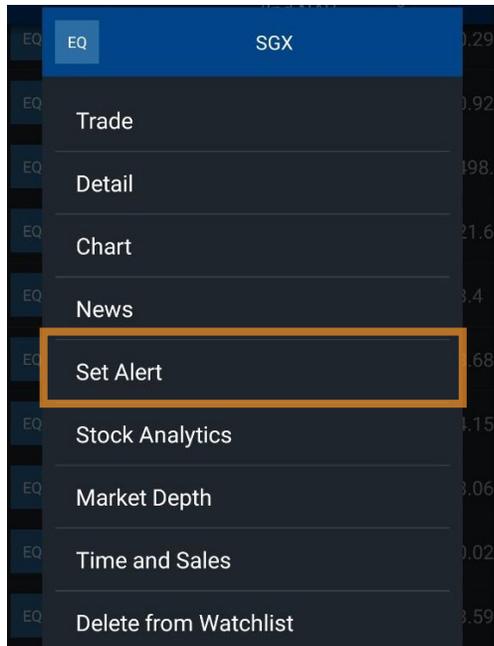**Step 1:** Tap on your desired counter to open Details Screen
Step 2: Select **News**

METHOD 3: Using hamburger menu

Step 1: Tap on the hamburger menu
Step 2: Select **News**
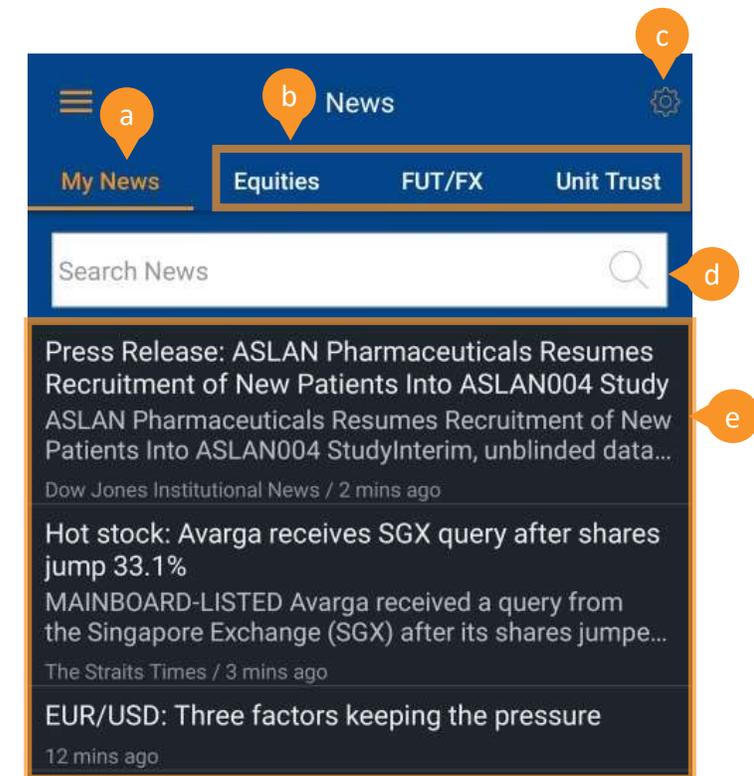
a. Auto-populates relevant news based on counters from your watchlists
b. Tap to view news by different asset classes
c. Filter counter specific news by language, asset, source, subject, country or industry
d. Search counter specific news
e. Scroll up and down to view more news

21

HOW TO MONITOR THE MARKET

Watchlist | Details | Chart | Top Movers | Market Depth | Time and Sales | Stock Analytics | News | **Alerts** | Discover | Economic Calendar

Alerts (Setting Price Alerts)

Receive alerts wherever you go, whichever platform you choose to. Set up to 50 price alerts!

METHOD 1: Using Contextual Menu*

Step 1: Tap and hold on your desired counter to open Contextual Menu

Step 2: Select **Set Alert**

METHOD 2: Using Details Screen*

Step 1: Tap on your desired counter to open Details Screen

Step 2: Select **Set Alert**

METHOD 3: Using Alert module

Step 1: Tap on the hamburger menu

Step 2: Select **Alerts**

Step 3: Search for your desired counter to add price alert
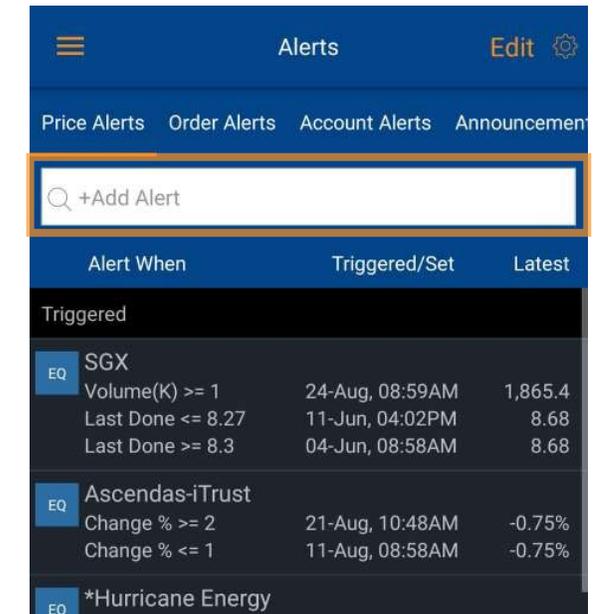
HOW TO MONITOR THE MARKET

Watchlist | Details | Chart | Top Movers | Market Depth | Time and Sales | Stock Analytics | News | **Alerts** | Discover | Economic Calendar

Alerts (Setting Price Alerts)

Travelling around? No problem! Simply stay up-to-date with mobile push notifications.

a. Enter the Target Low Price and/or High Price

b. Select trigger based on Last Done, Bid Price or Ask Price

c. Add additional criteria such as % change or volume target

d. Tap Save to complete your price alert setting

Watchlist | Details | Chart | Top Movers | Market Depth | Time and Sales | Stock Analytics | News | **Alerts** | Discover | Economic Calendar

Alerts (View Alerts)

All Price Alerts are synchronized with POEMS 2.0
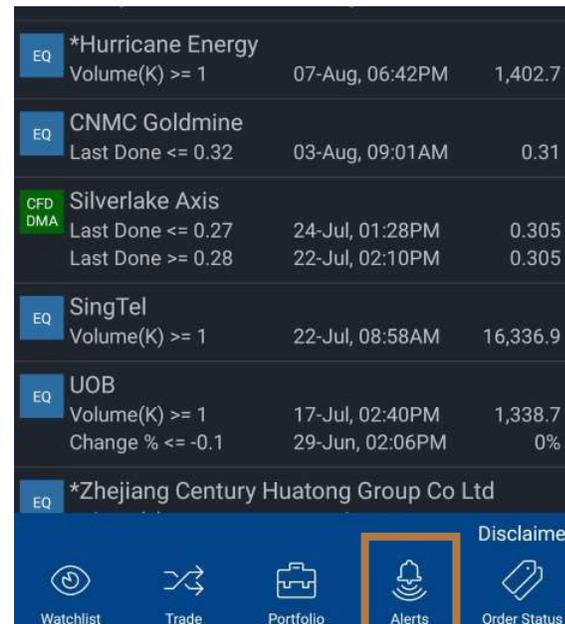
METHOD 1: Using hamburger menu

Step 1: Tap on the hamburger menu

Step 2: Select **Alerts**
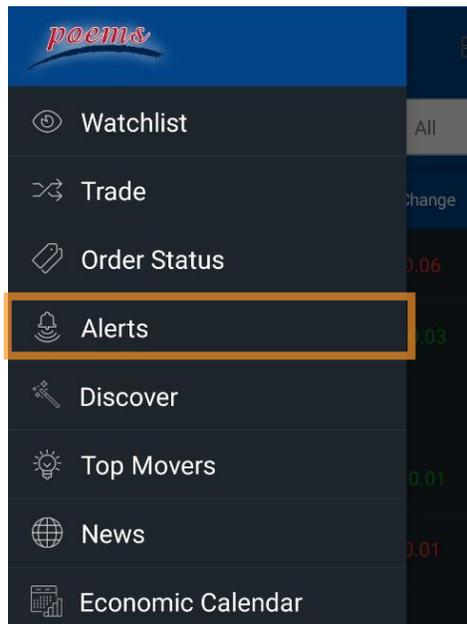
METHOD 2: Using shortcut bar

Step 1: Select **Alerts** on the shortcut bar

Row(s) will be highlighted if you have yet to "read" the alert
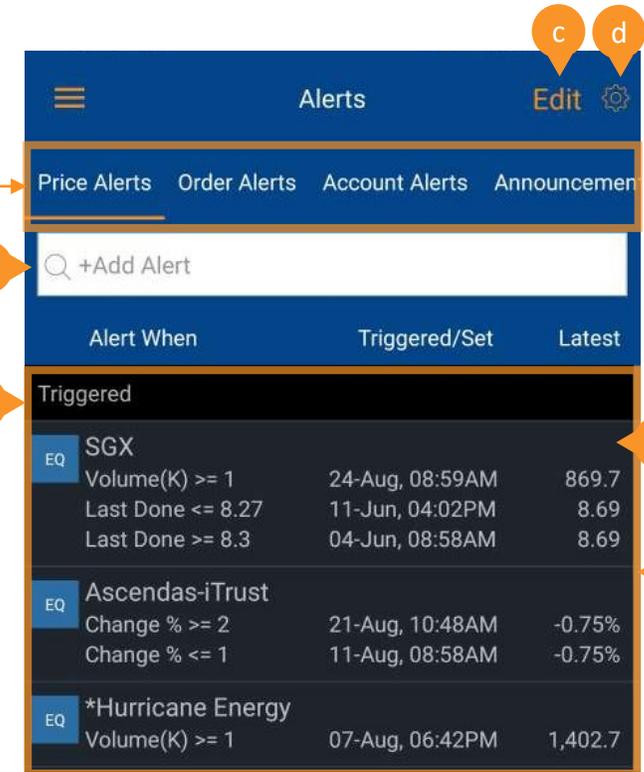
Swipe to find:

›› Price Alerts
›› Order Alerts
›› Account Alerts
›› Announcement Alerts

a. Scroll down to view triggered/untriggered alerts

b. Search for counters to add price alerts

c. Tap to manage your alerts

d. Tap to go to Alert Options

e. Tap and hold any alerts to open Contextual Menu

HOW TO MONITOR THE MARKET

Watchlist | Details | Chart | Top Movers | Market Depth | Time and Sales | Stock Analytics | News | Alerts | **Discover** | Economic Calendar

Discover

Discover trading insights from counters that are selected using a set of unique AI-powered algorithms that are tailored to your investment portfolio

How to get to Discover module
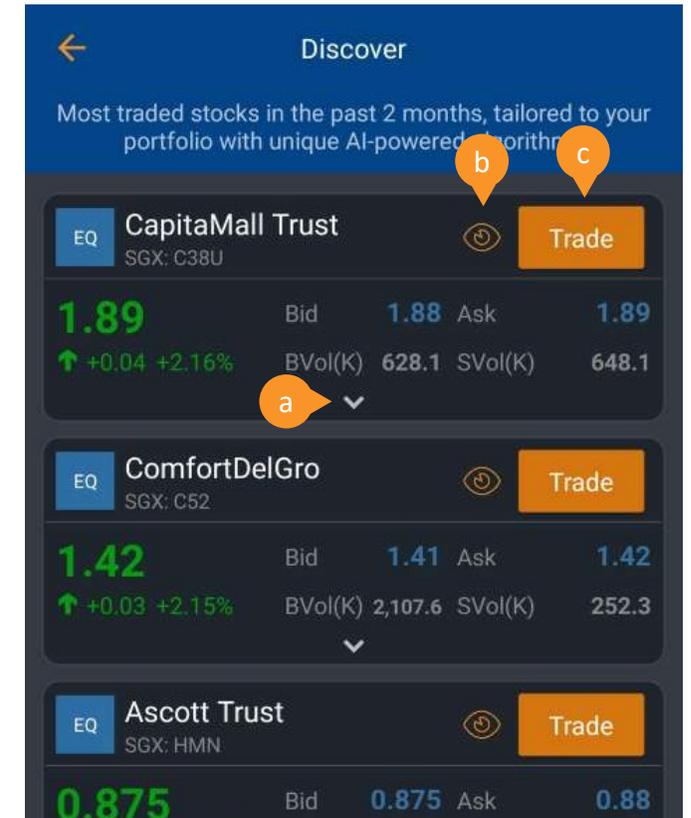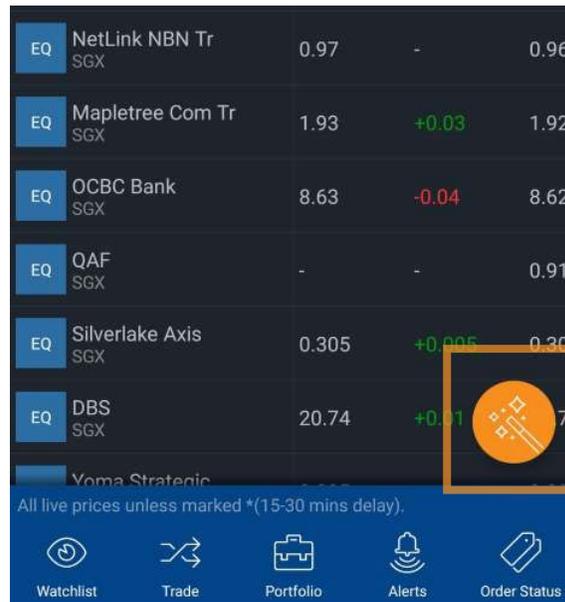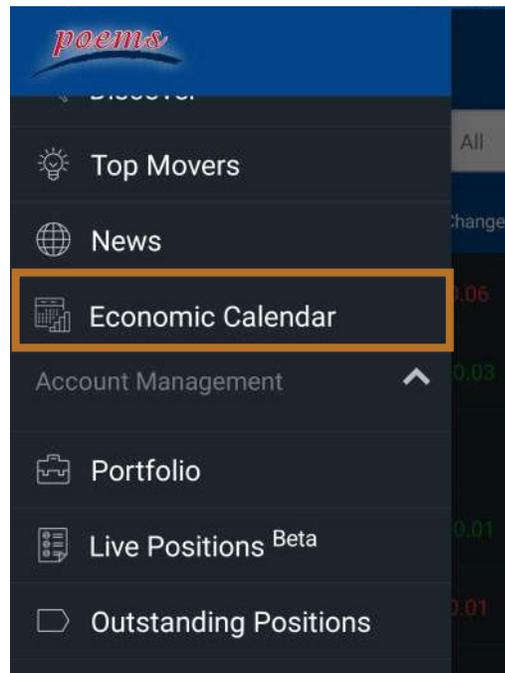
METHOD 1: Using hamburger menu

Step 1: Tap on the hamburger menu
Step 2: Select **Discover**
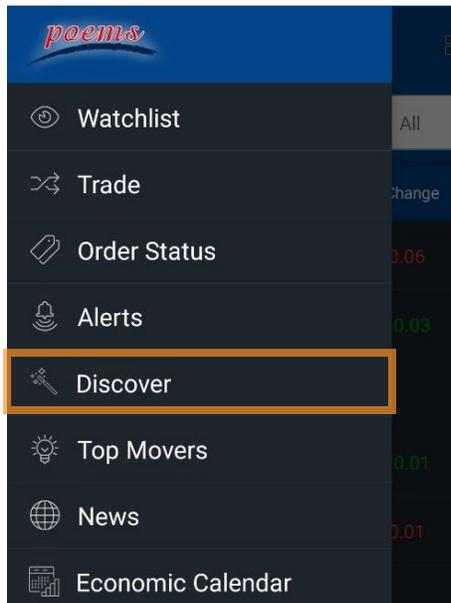
METHOD 2: Using Hint Bubble

Step 1: Tap on the **Hint Bubble** available in your watchlist

a. Tap to get more details about the counter

b. Tap to add counter to watchlist

c. Tap on Trade to open Trade Ticket

HOW TO MONITOR THE MARKET

Watchlist | Details | Chart | Top Movers | Market Depth | Time and Sales | Stock Analytics | News | Alerts | Discover | **Economic Calendar**

Economic Calendar

Browse recent and upcoming major affairs to monitor market-moving events and make swift trading decisions

How to get to Economic Calendar

Step 1: Tap on the hamburger menu

Step 2: Select **Economic Calendar**

a. Tap on any event to get more details

b. View present, recent and upcoming events

c. Filter events by volatility, country and category

HOW TO TRADE

Trade | Order Status | Product and Order Types | UT Basket | RSP | FX Invest
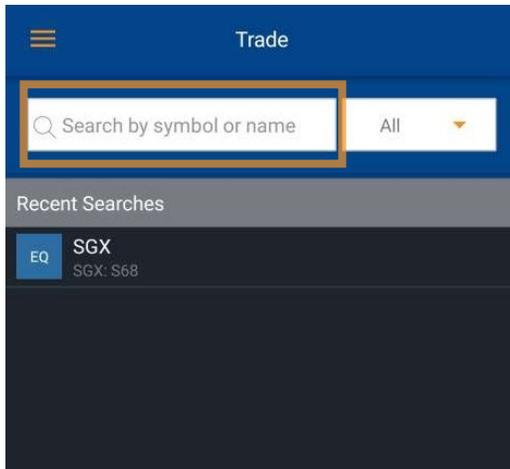
Trade

Four methods to open Trade Ticket in POEMS Mobile 2.0

METHOD 1: Using Trade module

Step 1: Tap on **Trade** using the hamburger menu or shortcut bar
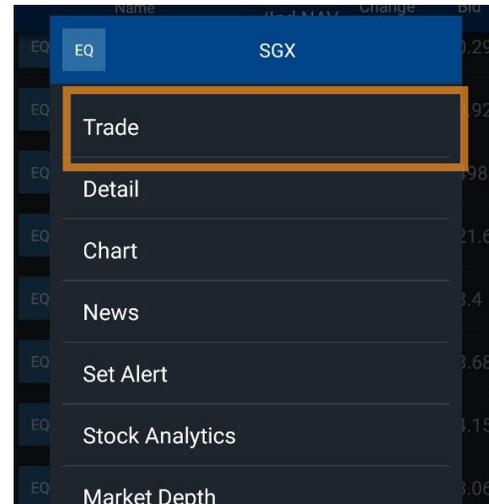
Step 2: Search for the counter you want to trade

METHOD 2: Using Contextual Menu*

Step 1: Tap and hold on your desired counter to open Contextual Menu

Step 2: Select **Trade**

METHOD 3: Using Details Screen*

Step 1: Tap on your desired counter to open Details Screen

Step 2: Tap on **Trade**

METHOD 4: Using Discover module

Step 1: Tap on **Discover** using hamburger menu
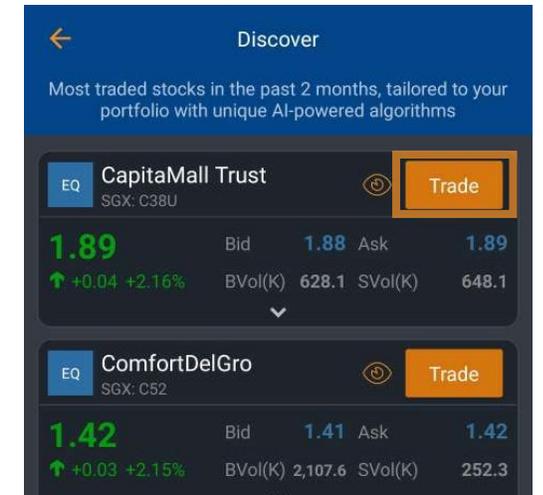
Step 2: Select **Trade**

Trade | Order Status | Product and Order Types | UT Basket | RSP | FX Invest

Trade (Equity)
Trade widget explained

a. Select Order Type (differs by product/market)
b. Select Trade Action (short sell is only available for SGX exchange)
c. Set Price through manual input
d. Check to activate Force Key
e. Select Payment Type
f. Select order Validity
g. Key in Password
h. View your Available Cash and Trading Limits
i. Tap on Buy to open confirmation window
j. Settlement Currency of current order (Good-Till-Date order up till 30 days)
k. Gross Value based on price and quantity
l. Set Quantity through manual input

m. Tap to return to previous menu
n. Double check your order submission details here
o. Tap on Submit to proceed

*After tapping on **Buy** or **Sell** or **Short Sell**, a confirmation window will appear*

Trade | Order Status | Product and Order Types | UT Basket | RSP | FX Invest

Trade (Unit Trust)

Trade widget explained

a. Select the action type
b. Enter the desired investment amount
c. Select Fund Source
d. Tap on Buy to open confirmation window
e. Tap on "Add to Basket" to continue shopping for funds before buying
f. Select Dividend Option (Withdraw/Reinvest)
g. Select Payment Currency
h. Tap to return to previous menu
i. Double check your order submission details here
j. Check the relevant boxes to proceed with order
k. Tap on Submit to trade fund

*After tapping on **Buy** or **Sell** or **Apply**, a confirmation window will appear*

HOW TO TRADE

Trade | Order Status | Product and Order Types | UT Basket | RSP | FX Invest

Trade (CFD)

Trade widget explained

a. Select the Order Type
b. Select the Action type
c. Set Limit Price through manual input
d. Select order Validity
e. Enter your password here
f. Tap on Buy to open confirmation window
g. Set Quantity through manual input
h. Tap to return to previous menu
i. Double check your order submission details here
j. Tap on Submit to trade counter

After tapping on **Buy** *or* **Sell**, *a confirmation window will appear*

Trade widget screen

Order Type	
	Limit Order
Action	
Buy	Sell
Limit Price	Quantity
0.73118	1
Currency: USD	X 10K
Gross Contract Value	7,311.8 USD
Margin Requirement	365.59 USD (5%)
Validity	
DAY	
Password Confirmation	
Password	
Avail. Cash 0 SGD	Credit Limit 0 SGD
Buy	

Preview Order screen

AUDUSD FX CFD

Bid 0.73108   1.2   Ask 0.7312
Low 0.7255   Spread   High 0.73156

Preview Order

Order Type	Limit Order
Action	Buy
Limit Price	0.73118 USD
Quantity	10,000
Gross Contract Value	7,311.8 USD
Margin Requirement	365.59 USD (5%)
Validity	DAY

Avail. Cash 0 SGD   Credit Limit 0 SGD

Submit

Trade | Order Status | Product and Order Types | UT Basket | RSP | FX Invest

Trade (Futures)

Trade widget explained

a. Select the Order Type

b. Select the Action type

c. Set Limit Price through manual input

d. Select order Validity

e. Enter your password here

f. Tap on Buy to open confirmation window

g. Set Quantity through manual input

h. Tap to return to previous menu

i. Double check your order submission details here

j. Tap on Submit to trade counter

Order Type		Limit
Action		BUY
Limit Price		23,100
Quantity		1
Initial Margin		1,080,000 JPY
Maintenance Margin		1,080,000 JPY
Validity		Day

*After tapping on **Buy** or **Sell**, a confirmation window will appear*

HOW TO TRADE

Trade | Order Status | Product and Order Types | UT Basket | RSP | FX Invest

Trade (Forex)

Trade widget explained

a. Select the Order Type

b. Select the Action type

c. Set Price through manual input

d. Select order Validity

e. Enter your password here

f. Tap on Buy to open confirmation window

g. Set Quantity through manual input

h. Tap to return to previous menu

i. Double check your order submission details here

j. Tap on Submit to trade counter

Order Type
a — Limit

Action
b — BUY | SELL

Price — **c** 1,986.1
Currency:USD

Quantity — **g** 1
X 100OZ

Initial Margin — **39,711.6 USD**
Maintenance Margin — **39,711.6 USD**

Validity
d — Day

Password Confirmation
e — Password

Balance 12,165.46 SGD | Margin Excess/Deficit 11,321.65 SGD | Utilization 6.94%

f — Buy

*After tapping on **Buy** or **Sell**, a confirmation window will appear*

h ← REG FX Loco London Gold

Bid **1985.55** | 60 | Ask **1986.15**
Low **1965** | Spread | High **1989.45**

Preview Order

i

Order Type — Limit
Action — BUY
Limit Price — 1,986.1
Quantity — 100
Initial Margin — 39,711.6 USD
Maintenance Margin — 39,711.6 USD
Validity — Day

Balance 12,165.46 SGD | Margin Excess/Deficit 11,321.65 SGD | Utilization 6.94%

j — Submit

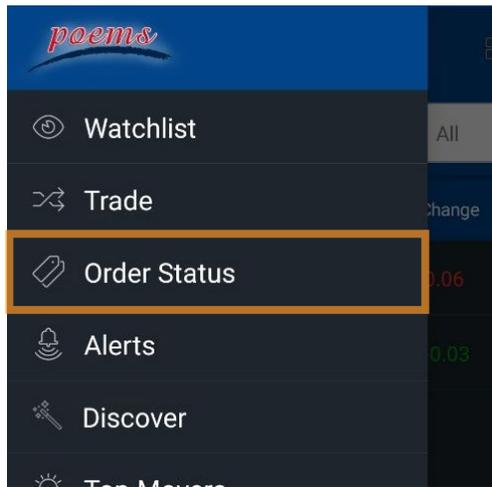# HOW TO TRADE

Order Status

View your working and past orders in the Order Status tab

How to check Order Status
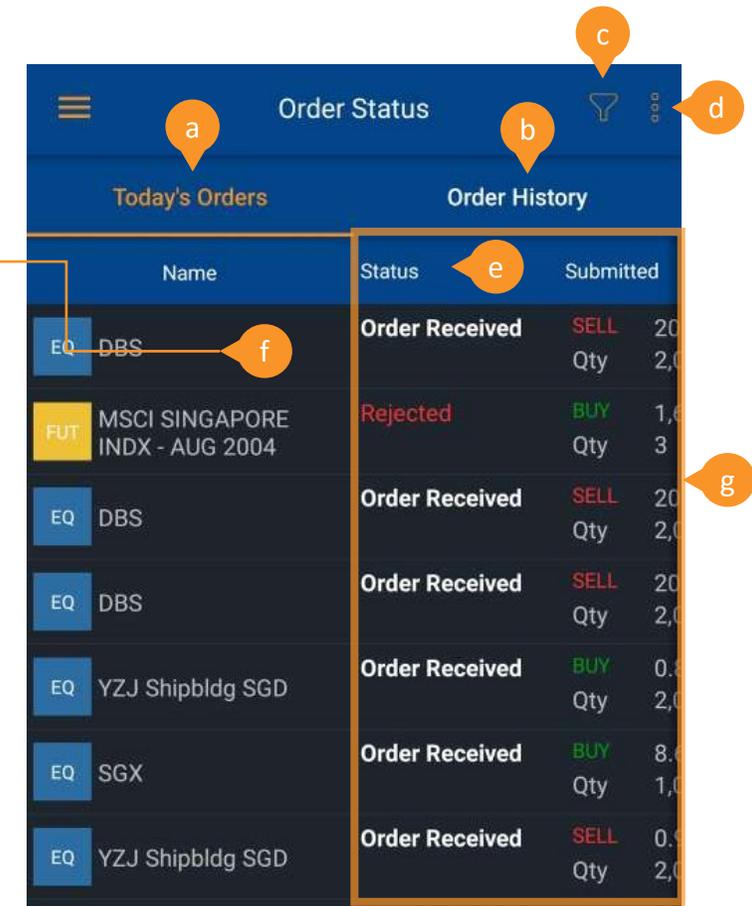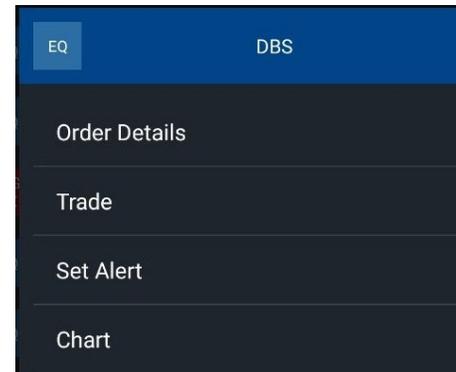
METHOD 1: Using hamburger menu

Step 1: Tap on the hamburger menu

Step 2: Select **Order Status**

METHOD 2: Using shortcut bar

Step 1: Select **Order Status** from the shortcut bar

a. Select to view Today's Orders

b. Select to view past orders

c. Filter orders by their order status

d. Tap to group by asset class or status

e. View order status

f. Tap and hold on the counter to open Contextual Menu

g. Movable panel (scroll left and right to view more information)

Product and Order Types

POEMS Mobile 2.0 has 8 product types over 15 global exchanges

	PRODUCT TYPES	ORDER TYPES
1	STOCKS	Limit, Stop Limit, Limit-If-Touched, Market, Market-On-Open, Market-On-Close
2	ETF (Exchange Traded Fund)	Limit, Stop Limit, Limit-If-Touched, Market, Market-On-Open, Market-On-Close
3	CFD (Contracts for Difference)	Limit, Stop Limit, IF Done, OCO
4	CFD-DMA (CFD-Direct Market Access)	Limit, Stop Limit, IF Done, OCO
5	REGULAR FOREX	Limit, Stop On Bid, Stop On Offer, OCO Stop On Bid, OCO Stop On Offer
6	MINI FOREX	Limit, Stop On Bid, Stop On Offer, OCO Stop On Bid, OCO Stop On Offer
7	FUTURES	Limit, Stop Limit
8	UNIT TRUST	Basket Order

HOW TO TRADE

UT Basket

UT (Unit Trust) basket works like a shopping cart, and allows funds to be easily "checked out" in one transaction. Up to 5 funds can be added to UT Basket!

How to get to UT Basket

Step 1: Tap on the hamburger menu

Step 2: Select **UT Basket**

*After tapping on **Checkout**, a confirmation window will appear*

a. Funds in basket are sorted by payment currency

b. Tap to edit your basket orders

c. Movable panel (scroll left and right to view more information)

d. Tap on Checkout to open confirmation window

e. Double check your order submission details here

f. Check the relevant boxes to proceed with order

g. Tap on Submit to proceed with order

HOW TO TRADE

Trade | Order Status | Product and Order Types | **UT Basket** | RSP | FX Invest

UT Basket (How to Add to Basket)

UT (Unit Trust) basket works like a shopping cart, and allows funds to be easily "checked out" in one transaction. Up to 5 funds can be added to UT Basket!
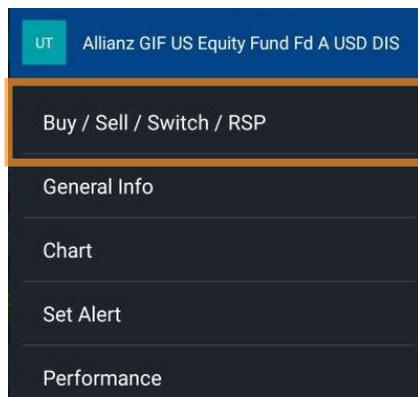
How to add counters to UT Basket

METHOD 1: Using Contextual Menu*

Step 1: Tap and hold on your desired counter to open Contextual Menu

Step 2: Select **Buy / Sell / Switch / RSP**

Step 3: Tap on **BUY NOW**

Step 4: Tap on **Add to Basket**

UT	Allianz GIF US Equity Fund Fd A USD DIS
Buy / Sell / Switch / RSP	
General Info	
Chart	
Set Alert	
Performance	

METHOD 2: Using Details Screen*

Step 1: Tap on your desired counter to open Details Screen

Step 2: Tap on **BUY NOW**

Step 3: Tap on **Add to Basket**

Asset Class	Fixed Income
Sector	Diversified
Launch Date	01 Jun 2001
Launch Price	-
Geography	United States
Benchmark Index	Bloomberg Barclays US Aggregate Bond Index
Price Type	Net Asset Value
Price Made Known On	T+2
Add to Watchlist	Set Alert	**BUY NOW**
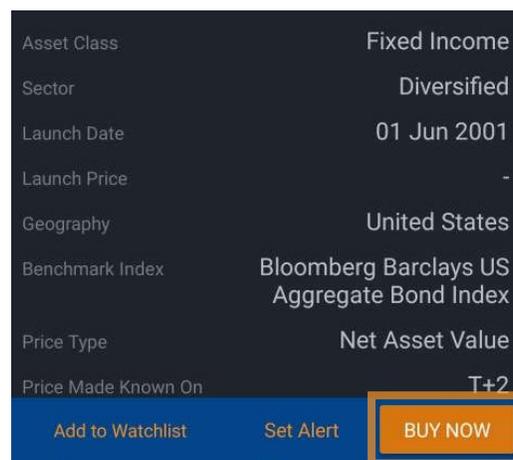
a. Select Action Type
b. Enter the desired investment amount
c. Select Fund Source
d. Tap on Add to Basket to continue shopping for funds before buying
e. Select Dividend Option (Withdraw/Reinvest)
f. Select Payment Currency

36
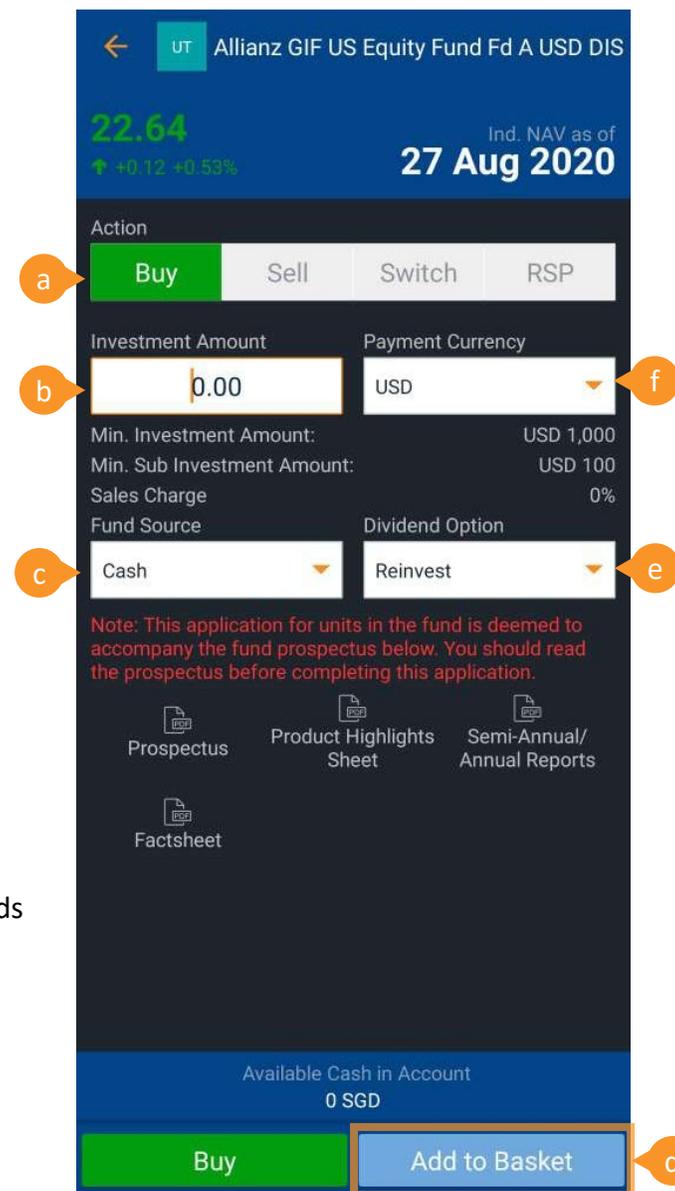
HOW TO TRADE

Trade | Order Status | Product and Order Types | UT Basket | RSP | **FX Invest**
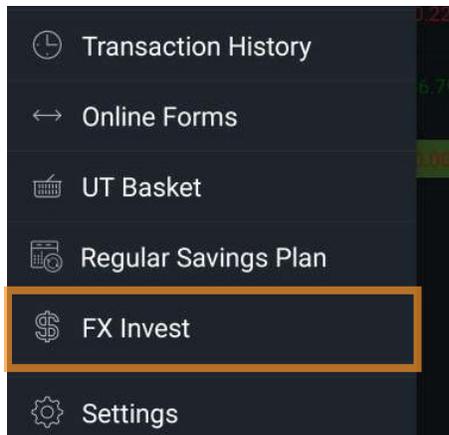
FX Invest

Manage your multi-currency portfolio as you trade the wide variety global asset classes available on our trading platforms

How to get to FX Invest

Step 1: Tap on the hamburger menu

Step 2: Select **FX Invest**

a. View different watchlists (maximum 5 watchlists)

b. Edit watchlist

c. Tap on respective Bid and Offer prices to select your currency conversion

d. Movable panel (scroll left and right to view more information)

e. Tap to toggle between different historical periods

f. Toggle to expand/collapse transactions

g. View your Full Account details here

h. Available Funds are specific to your Futures trading account

i. Tap to Withdraw Fund (Zero funds or Restricted currencies will be greyed out and are non-withdrawable)

FX Invest (Rates)

FX Invest (Transaction History)

FX Invest (Equity Balance)

HOW TO MANAGE YOUR ACCOUNT

Portfolio | Live Positions | Outstanding Positions | Transaction History | Online Forms
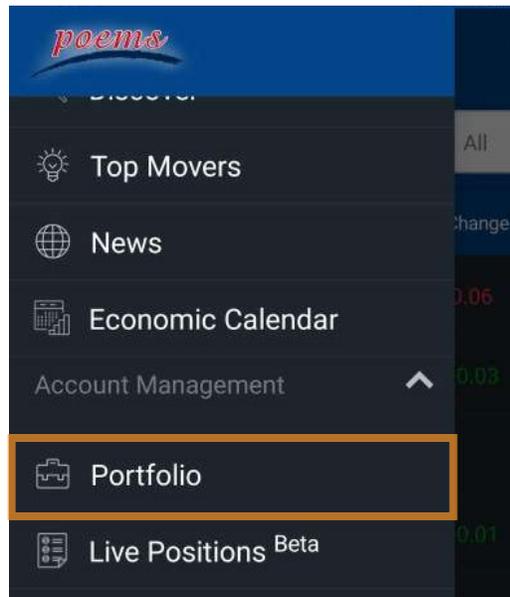
Portfolio

Monitor and manage your investments on-the-go and get a quick breakdown of your portfolio by different asset classes

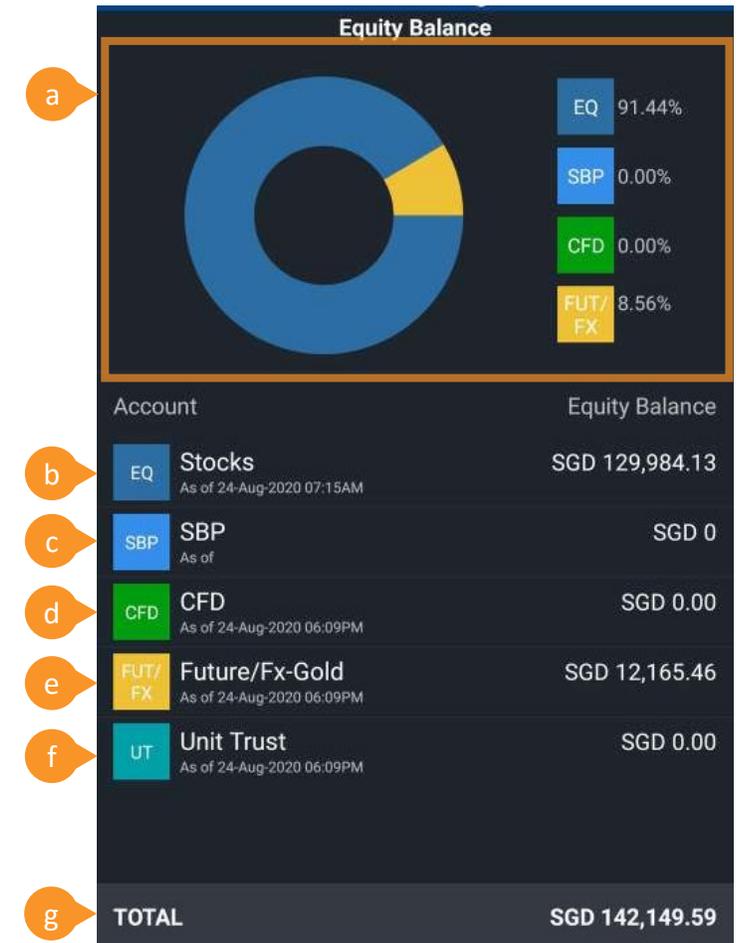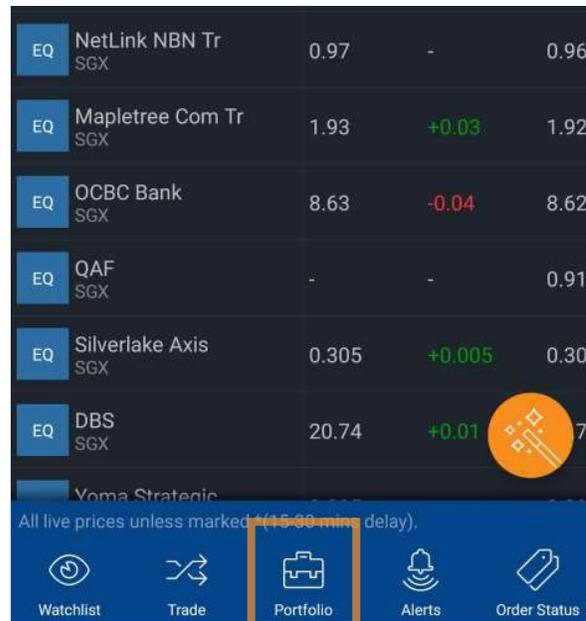## How to view Portfolio

METHOD 1: Using hamburger menu

Step 1: Tap on the hamburger menu

Step 2: Select **Portfolio**

METHOD 2: Using shortcut bar

Step 1: Select **Portfolio** from the shortcut bar

a. Get an overview of your portfolio by different asset classes

b. Tap to view account details, holdings and realised P/L for **Stocks**

c. Tap to view Account Details and Holdings for **SBP**

d. Tap to view Account Summary and Positions for **CFD**

e. Tap to view Account Details and Positions for **Future/Forex**

f. Tap to view Account Details and Holdings for **Unit Trust**

g. Current total portfolio balance of account

Portfolio | Live Positions | Outstanding Positions | Transaction History | Online Forms

Portfolio

Monitor and manage your investments on-the-go and get a quick breakdown of your portfolio by different asset classes

Portfolio (Account Details)   Portfolio (Holdings)   Portfolio (Realised P/L)

a. Switch between different asset classes   **b.** Movable panel (scroll left and right to view more information)   **c.** Filter by month

HOW TO MANAGE YOUR ACCOUNT

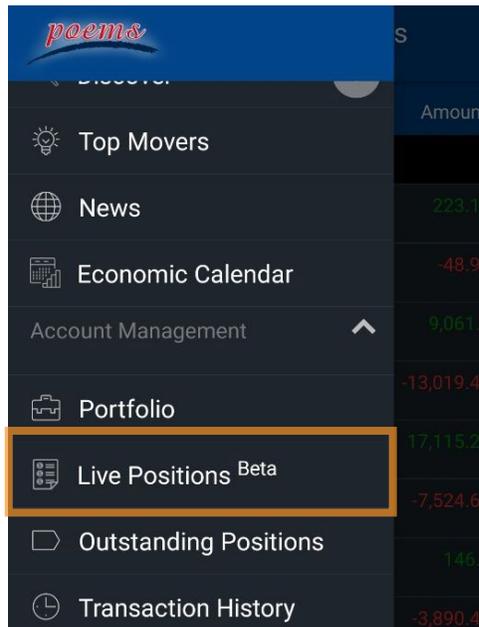Portfolio | **Live Positions** | Outstanding Positions | Transaction History | Online Forms

Live Positions (Beta*)
Overview of the live profit and loss performance of your equity trades and/or net holdings

How to view Live Positions

Step 1: Tap on the hamburger menu

Step 2: Select **Live Positions**

a. Tap to filter by Intraday, Settled Positions and Outstanding Position

b. Movable panel (scroll left and right to view more information)

c. Only captures done order for the day (amount excludes fee charges)

*Beta means that the module is still in the development stages and is not the final version

42

Outstanding Positions
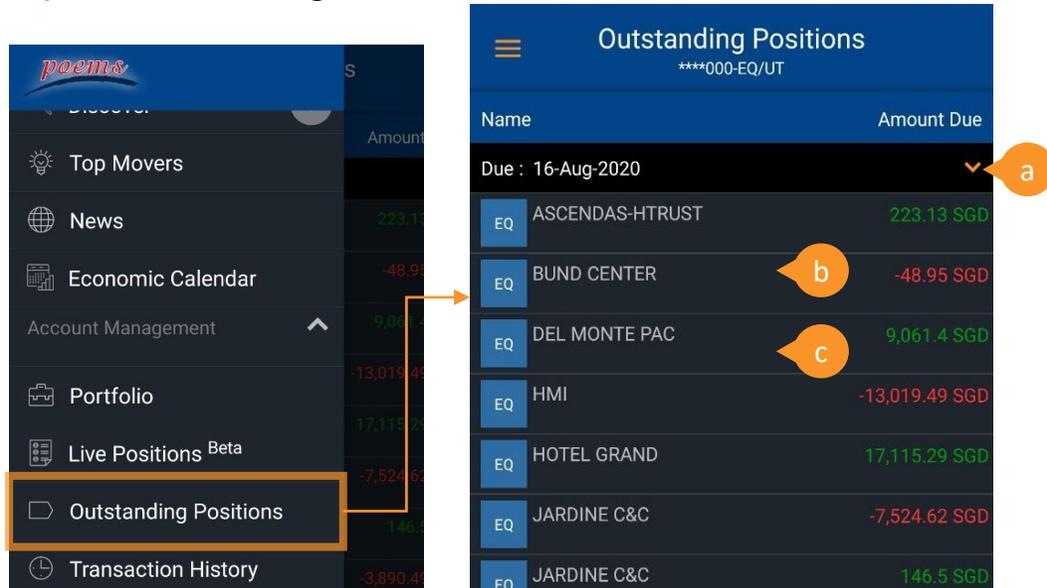
All your outstanding positions of your trades due for payment

How to get to Outstanding Positions

Step 1: Tap on the hamburger menu
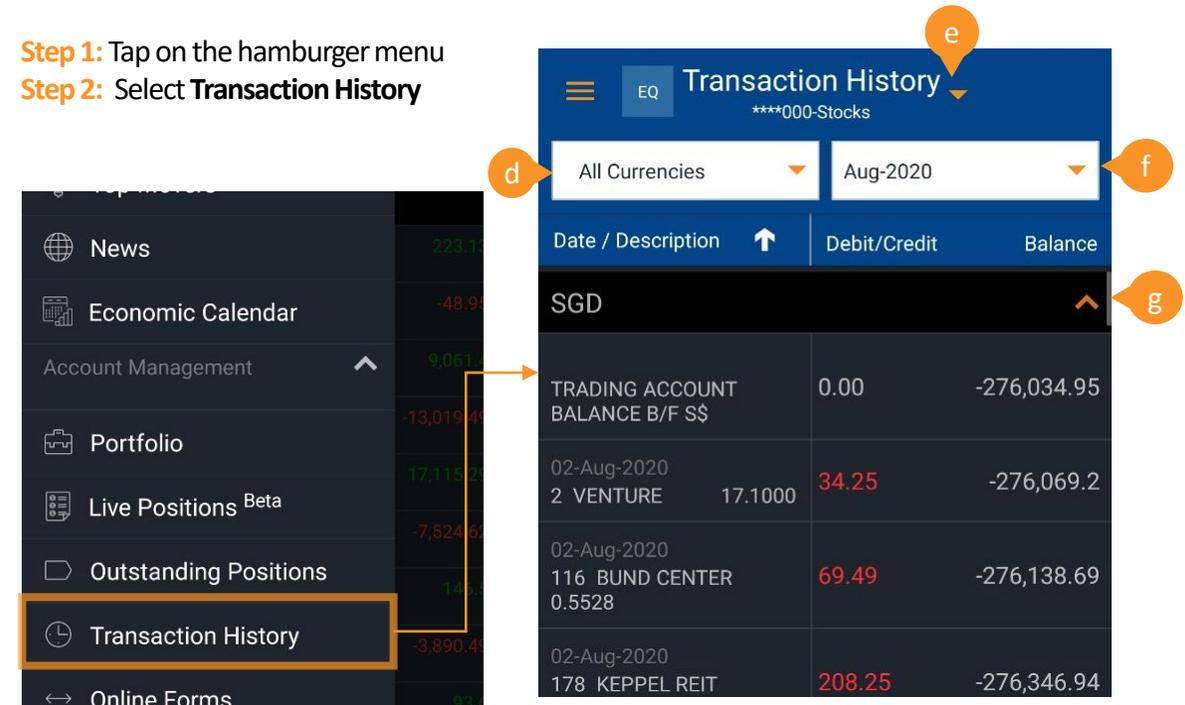**Step 2:** Select **Outstanding Positions**

Transaction History

View information about trades transactions, deposit and withdrawals of your account

How to get to Transaction History

Step 1: Tap on the hamburger menu
Step 2: Select **Transaction History**

a. Tap to expand or shrink outstanding position by day

b. Tap on your desired counter to open Position Details

c. Tap and hold on counter to open Contextual Menu

d. Filter by currencies

e. Filter by asset class

f. Filter by month

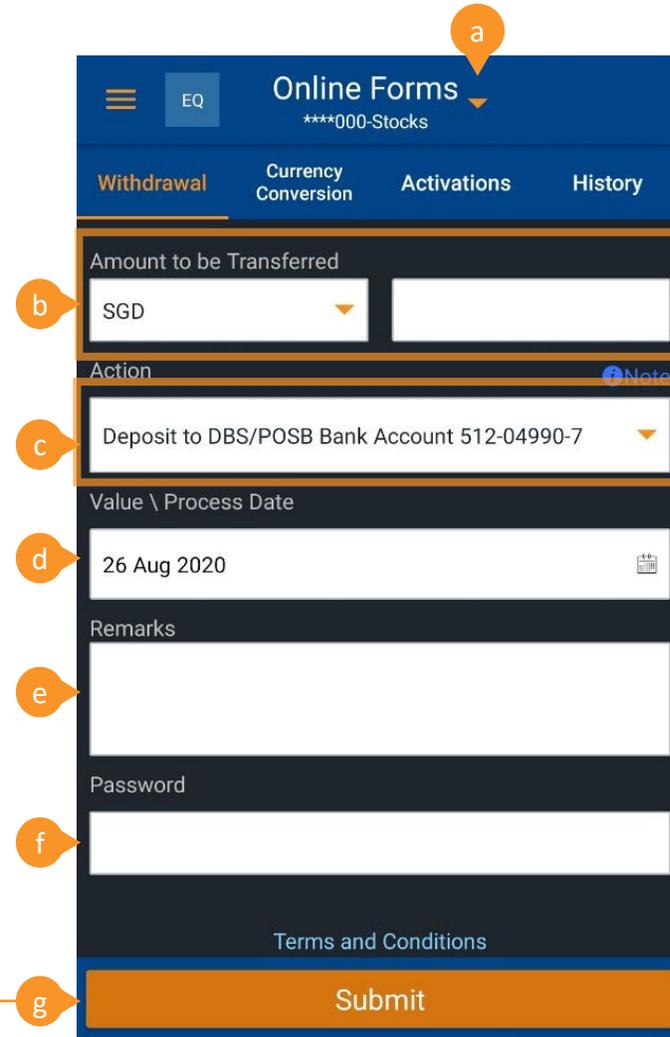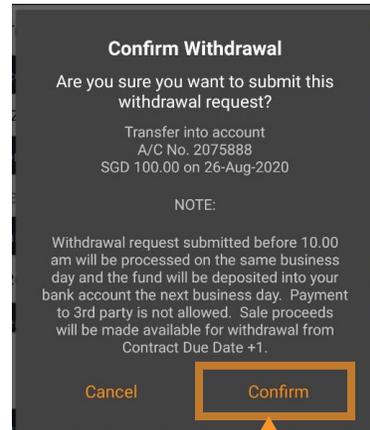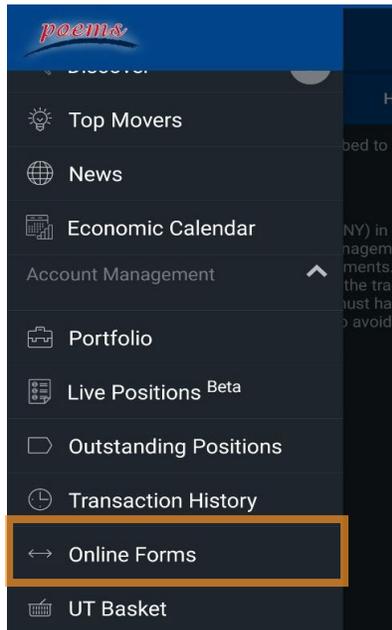**g.** Tap to expand or shrink transaction history by currency

Online Forms (Withdrawal)

Online forms for withdrawal, currency conversion, activations and history

How to get to Online Forms

Step 1: Tap on the hamburger menu
Step 2: Select **Online Forms**

a. Tap to select different asset classes

b. Select currency and withdrawal amount

c. Select withdraw action

d. Select the date to process this request

e. Enter any applicable remarks

f. Enter your password to proceed

g. Tap on Submit to open confirmation window

h. Tap on Confirm to submit withdrawal request
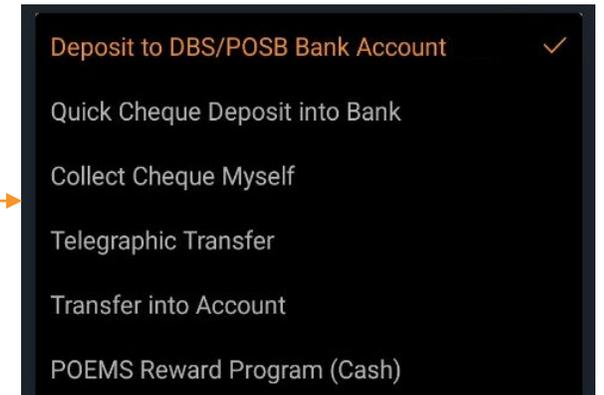
*After tapping on **Submit,** a confirmation window will appear*

Portfolio | Live Positions | Outstanding Positions | Transaction History | **Online Forms**

Online Forms (Currency Conversion)

Online forms for withdrawal, currency conversion, activations and history

POEMS offers multi-currency facility. If you would like to subscribe for multi-currency, enable **Opt-in** and tap on **Submit**

a. Tap to select different asset classes
b. Select conversion action
c. Key the amount you would like to convert from and to
d. Select the date to process this request
e. Enter any applicable remarks
f. Enter your password to proceed
g. Tap on Submit to proceed with conversion

45

Settings | POEMS Digital Token | Login and Password | App Preference | Alert | News

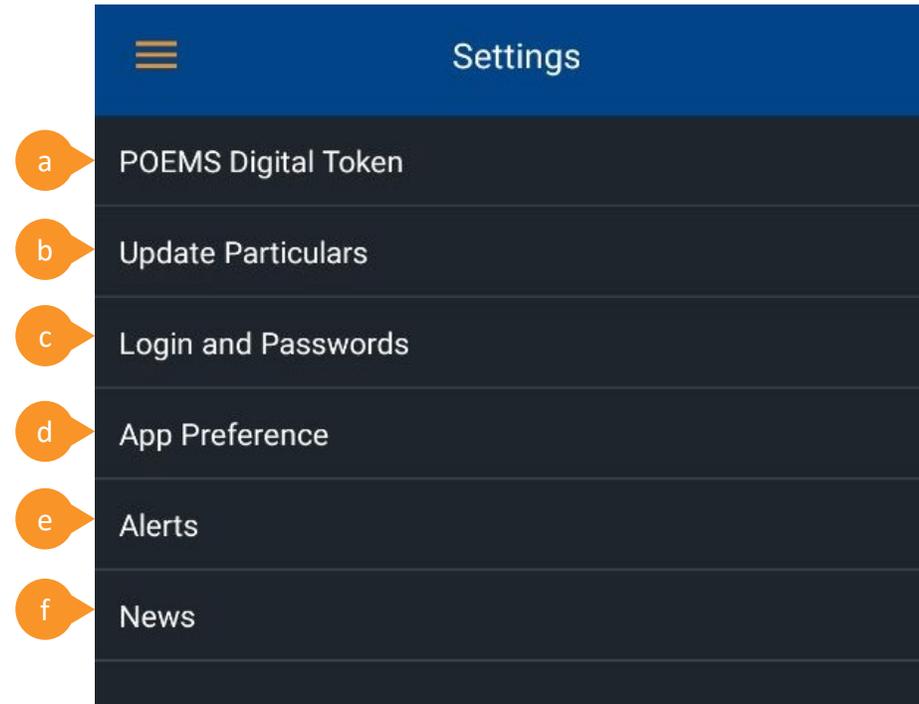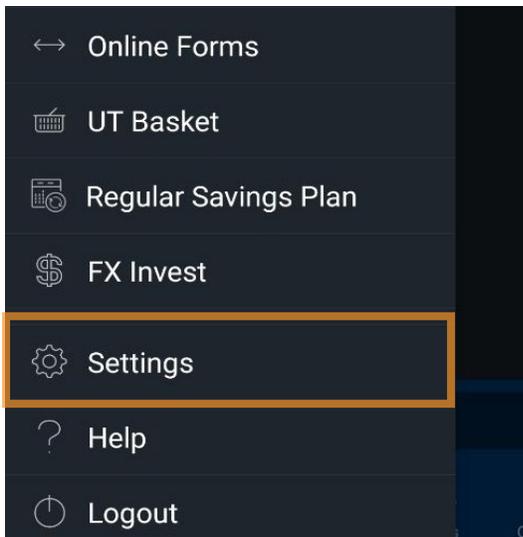# Settings
Make functional and aesthetic changes under Settings

How to get to Settings

Step 1: Tap on the hamburger menu

Step 2: Select **Settings**

a. Enable/disable POEMS Digital Token here
b. Update email address and mobile number here
c. Set session time out period and change password

d. Customise app outlook here
e. Customise alert notifications
f. Change news options here

POEMS Digital Token

A digital security token embedded within POEMS Mobile 2.0 that protects you against unauthorised access to the POEMS suite of trading platforms

How to get to enable POEMS Digital Token

Step 1: Select how you would like to receive the activation code

Step 2: Key in the code in the next screen within 2 minutes and the POEMS Digital Token will be enabled
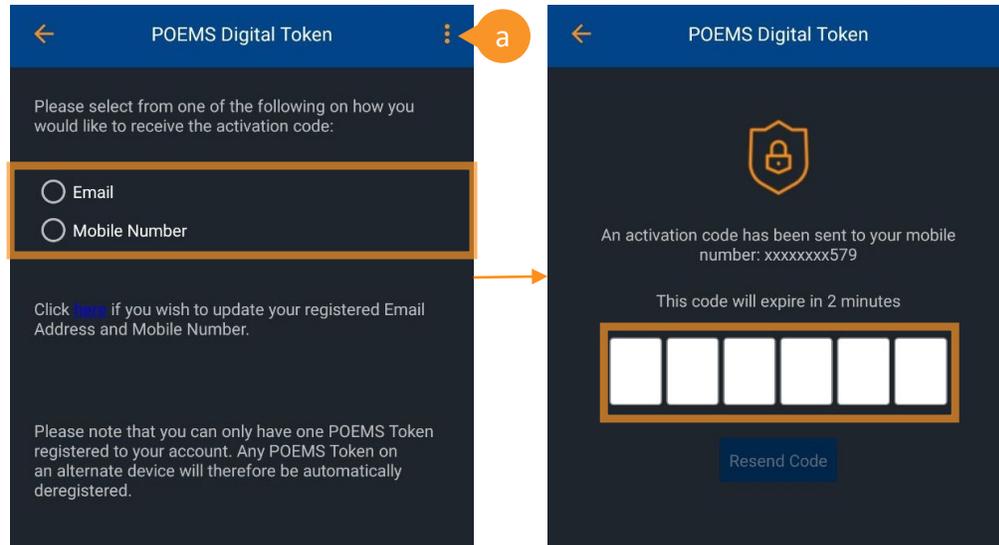
a. Click to browse POEMS Digital Token FAQs or Terms and Conditions

How to get to disable POEMS Digital Token

Step 1: Select **X** to disable the POEMS Digital Token on the selected device

Step 2: Select **Proceed** on the Delete Confirmation window

*After tapping on **X**, a confirmation window will appear*

HOW TO CUSTOMISE THE PLATFORM

Settings | POEMS Digital Token | **Login and Password** | **App Preference** | Alert | News

Login and Password
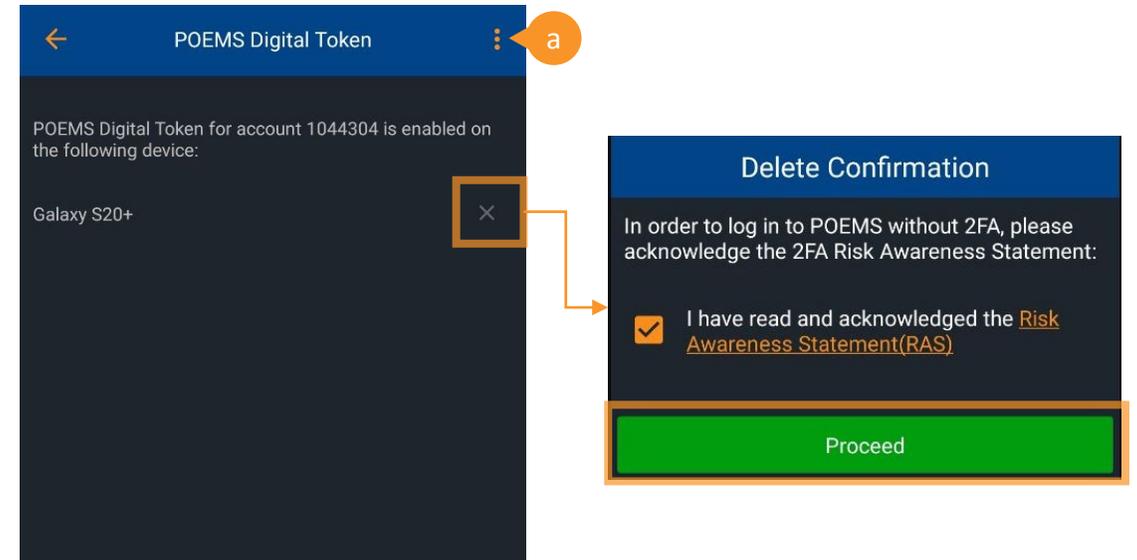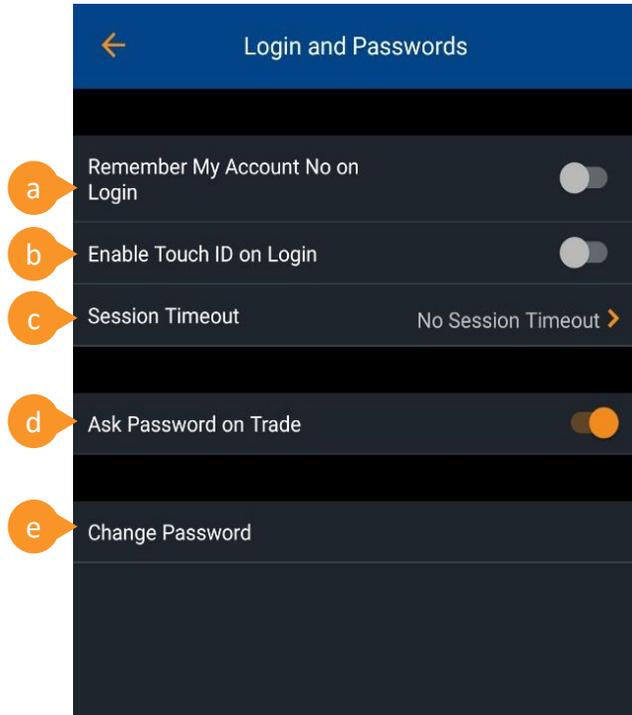Set session time out period and change password

a. Turn ON to remember your account number at login
b. Turn ON to enable Touch ID for login
c. Select desired period for app to "log" you out in
d. Turn ON if you would like the app to prompt you for your password at every Trade screen
e. Change password here

App Preference
Choose preferred theme, language and font size
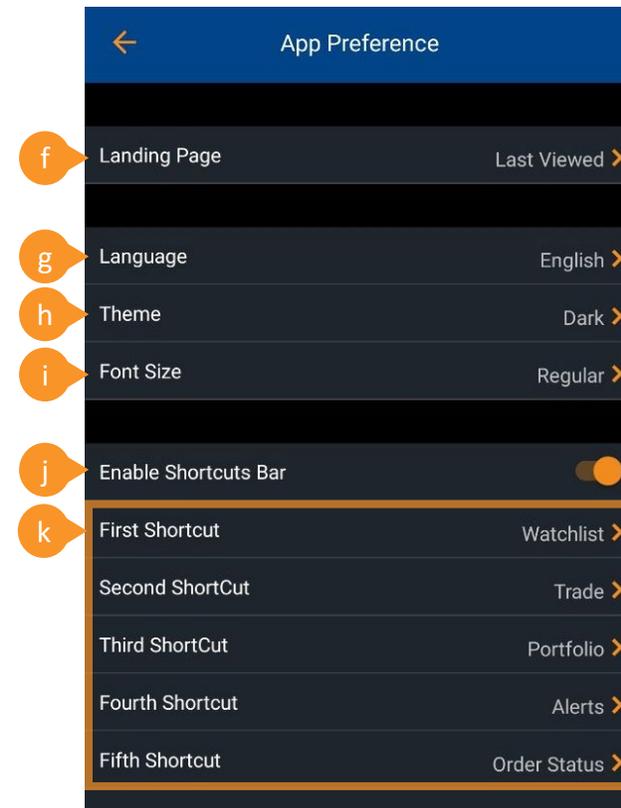
f. Choose your first landing screen every time you log into the app
g. Select app language
h. Change app theme
i. Change font size
j. Turn ON to enable shortcut bar
k. Customise shortcut bar to your preference

HOW TO CUSTOMISE THE PLATFORM

Settings | POEMS Digital Token | Login and Password | App Preference | **Alert**

Alert

Configure alerts under Settings

a. Turn ON to receive Price, Order and Discover alerts
b. Customise alerts individually

Individual Alerts:

›› Price Alerts
›› Order Alerts
›› Discover Alerts

Alert Options

All Alerts — (a)

Individual Alerts

Price Alerts — (b)

Order Alerts*

    Received

    Done

    Part Done

    Rejected

    Partially Rejected

    Triggered

    Amended

    Withdrawn

    Withdrawn Partially

    Other Status

*Not applicable for CFD Advanced Order Types

    Stocks Account Alerts

    CFD Account Alerts

    Unit Trust Account Alerts

    Announcement Alerts

Discover Alerts