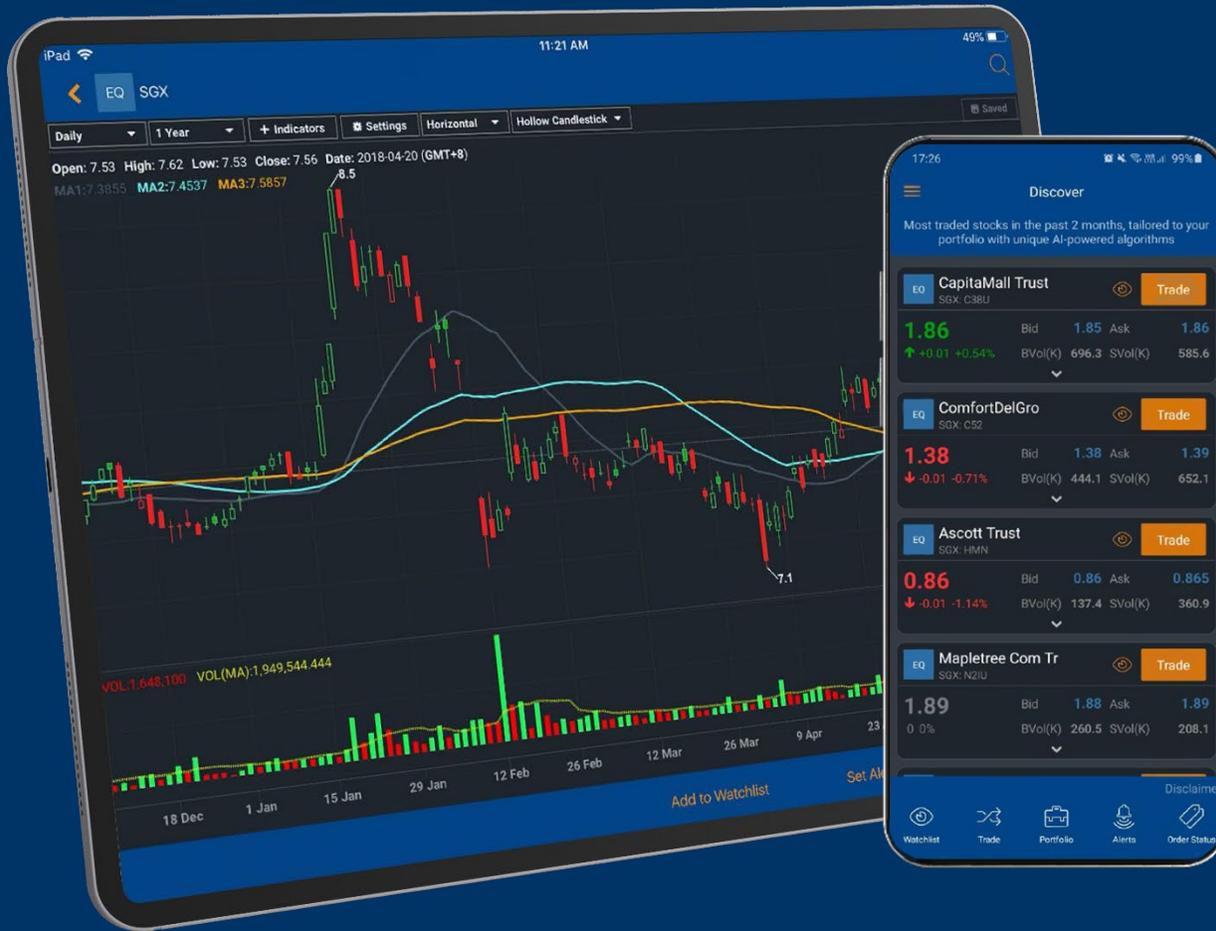




POEMS Mobile 2.0 User Guide

Scan the QR code to download the app



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.

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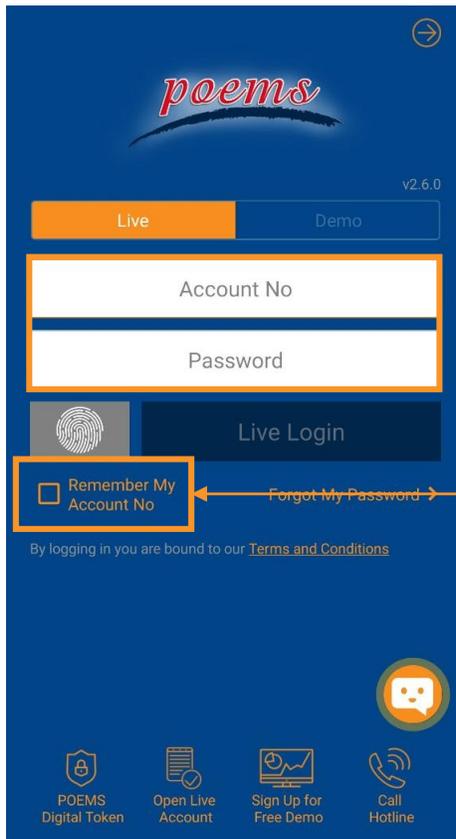
SYSTEMS REQUIREMENT

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

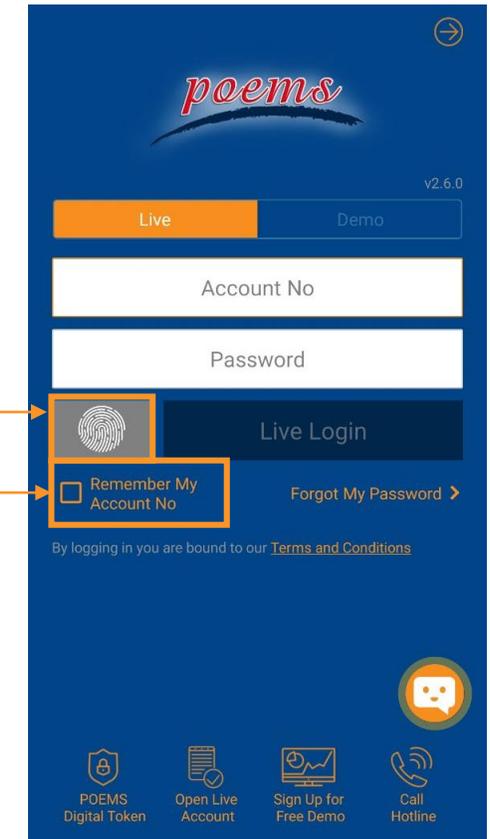
Step 2: Key in your login details and tap on **Live Login**

METHOD 2:

Step 1: Launch the POEMS SG 2.0 mobile app

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

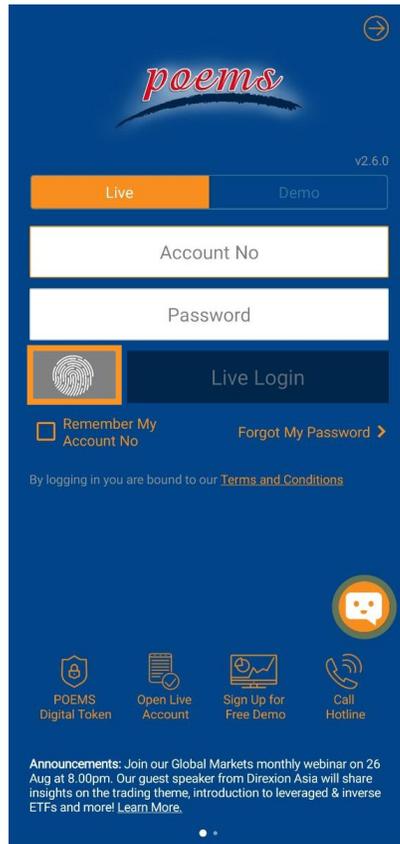
**Refer to slide 6 to learn how to activate POEMS Touch ID*



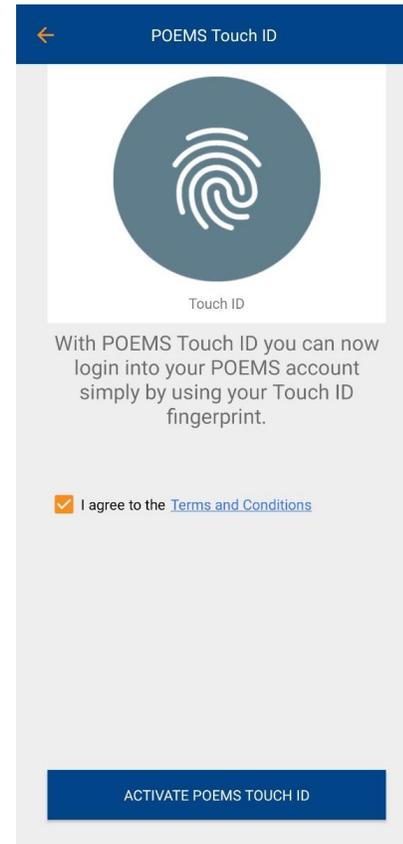
Check this box if you would like the app to remember your account number

GETTING STARTED

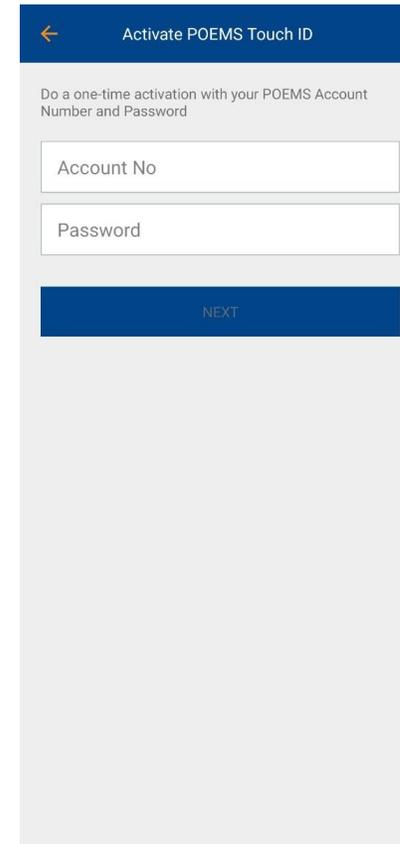
Activate POEMS Touch ID



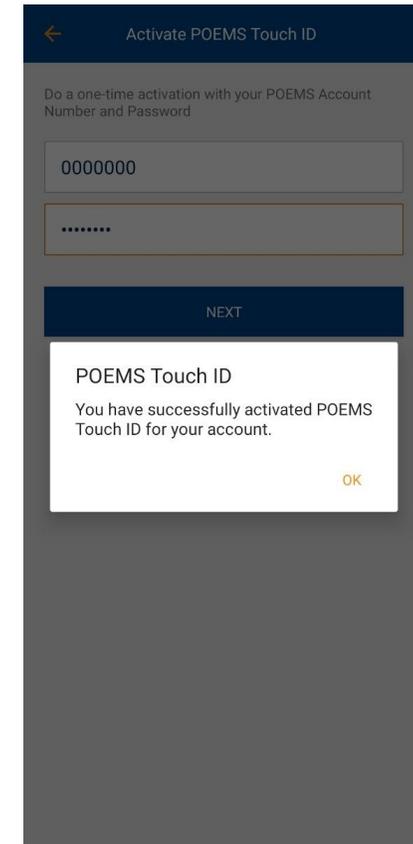
Step 1: Launch the POEMS SG 2.0 mobile app and tap on **POEMS Touch ID**



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

The image displays two screenshots of the POEMS Mobile 2.0 application. The left screenshot shows a vertical navigation menu with various modules. The right screenshot shows the 'SG Watchlist' page with a table of stock data and a bottom shortcut bar.

Navigation Menu (Callout c):

- 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 Page (Callout a and b):

SG Watchlist Edit

+Add Instrument to Watchlist All

	Name	Last /Ind.NAV	Change	Bid
EQ	UOB SGX	19.92	-	19.97
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).

Shortcut Bar (Callout b):

- Watchlist
- Trade
- Portfolio
- Alerts
- Order Status

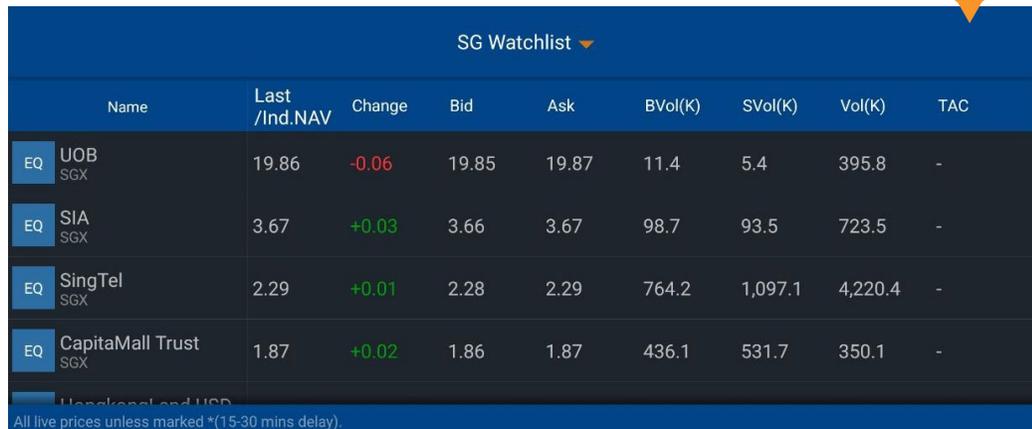
HOW TO MONITOR THE MARKET

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

Watchlist

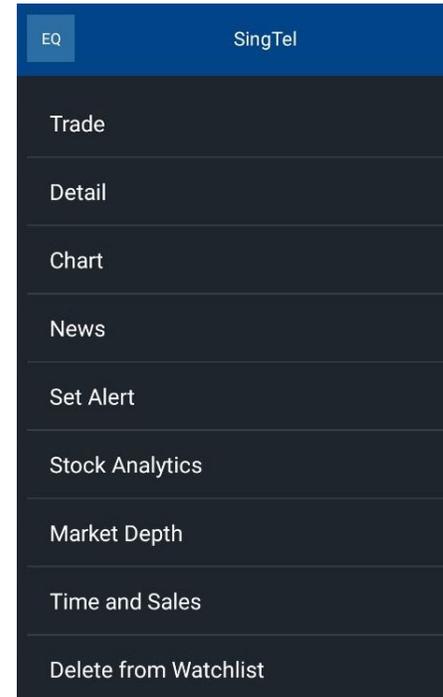
Watchlists are synchronized with POEMS 2.0

- 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

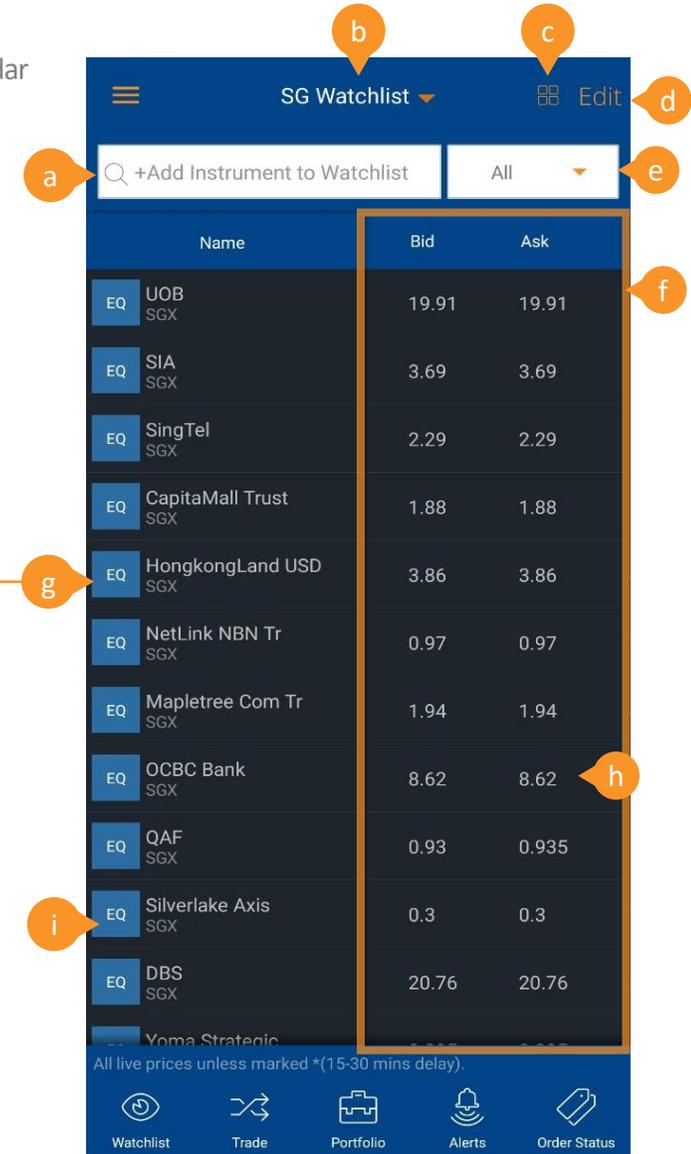


SG Watchlist									
	Name	Last /Ind.NAV	Change	Bid	Ask	BVol(K)	SVol(K)	Vol(K)	TAC
EQ	UOB SGX	19.86	-0.06	19.85	19.87	11.4	5.4	395.8	-
EQ	SIA SGX	3.67	+0.03	3.66	3.67	98.7	93.5	723.5	-
EQ	SingTel SGX	2.29	+0.01	2.28	2.29	764.2	1,097.1	4,220.4	-
EQ	CapitaMall Trust SGX	1.87	+0.02	1.86	1.87	436.1	531.7	350.1	-

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



- EQ SingTel
- Trade
- Detail
- Chart
- News
- Set Alert
- Stock Analytics
- Market Depth
- Time and Sales
- Delete from Watchlist



SG Watchlist Edit

+Add Instrument to Watchlist All

Name	Bid	Ask
EQ UOB SGX	19.91	19.91
EQ SIA SGX	3.69	3.69
EQ SingTel SGX	2.29	2.29
EQ CapitaMall Trust SGX	1.88	1.88
EQ HongkongLand USD SGX	3.86	3.86
EQ NetLink NBN Tr SGX	0.97	0.97
EQ Mapletree Com Tr SGX	1.94	1.94
EQ OCBC Bank SGX	8.62	8.62
EQ QAF SGX	0.93	0.935
EQ Silverlake Axis SGX	0.3	0.3
EQ DBS SGX	20.76	20.76

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

Watchlist Trade Portfolio Alerts Order Status

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**

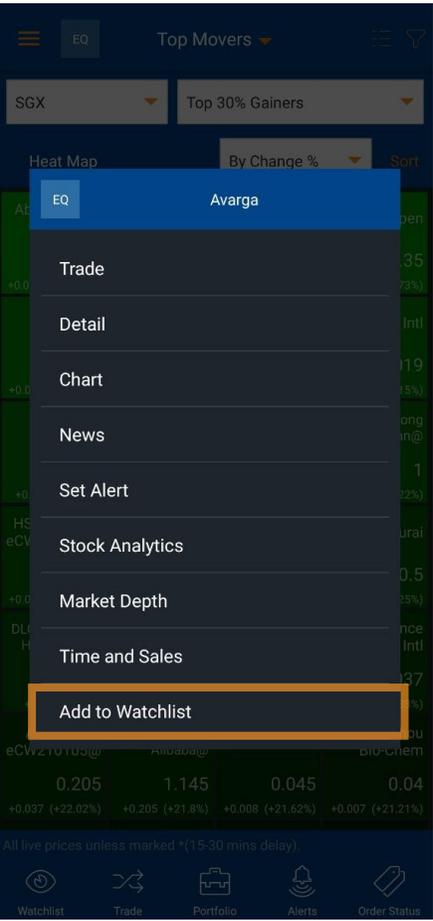


HOW TO MONITOR THE MARKET

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

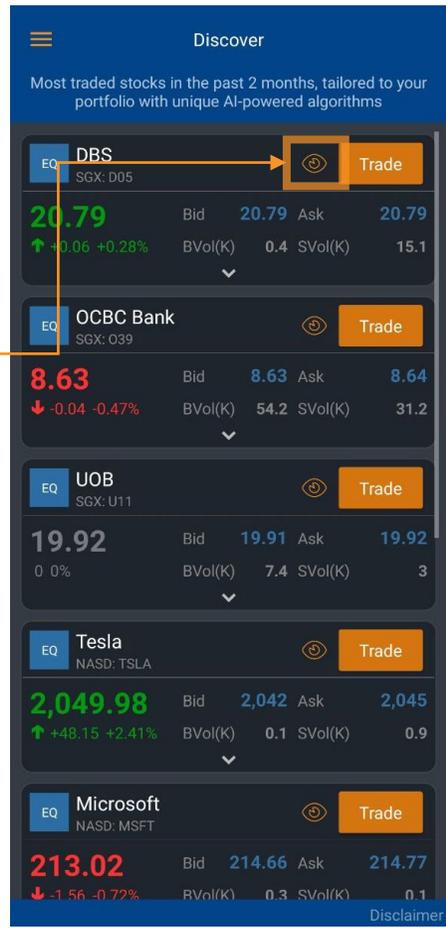
Step 2: Select **Add to Watchlist**

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

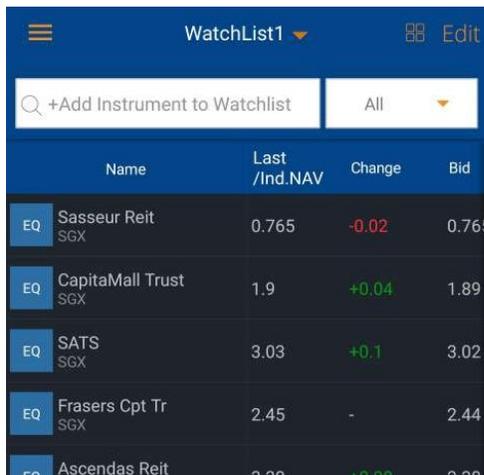
Details (Equity)

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

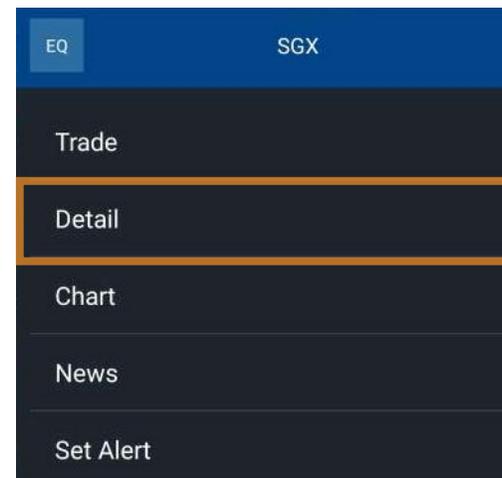
Step 1: Tap on your desired counter from your watchlist or Top Movers module to open Details Screen



METHOD 2: Using Contextual Menu*

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

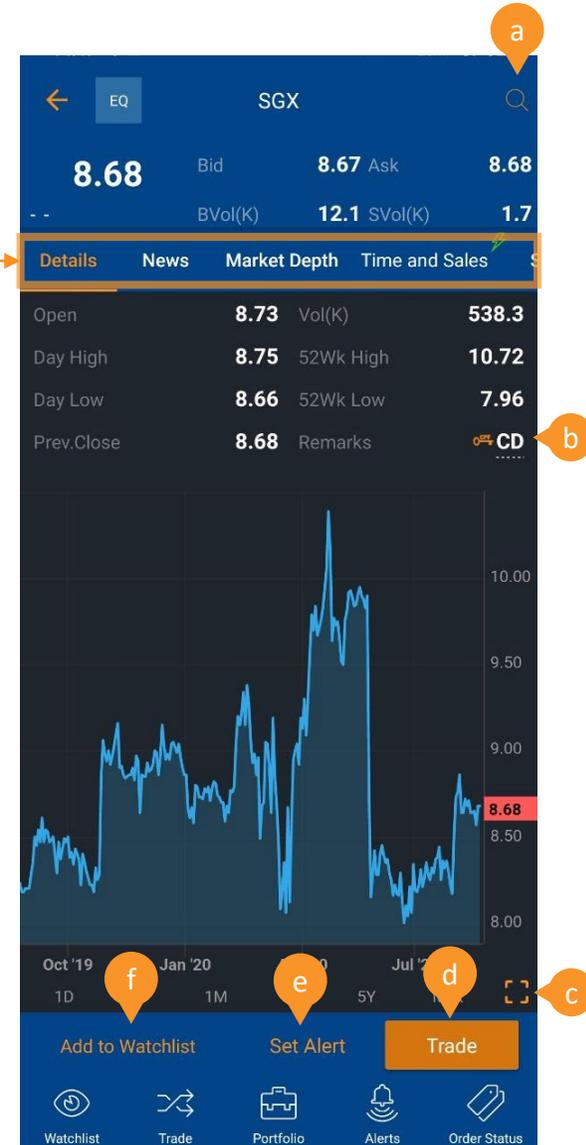
Step 2: Select **Detail**



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

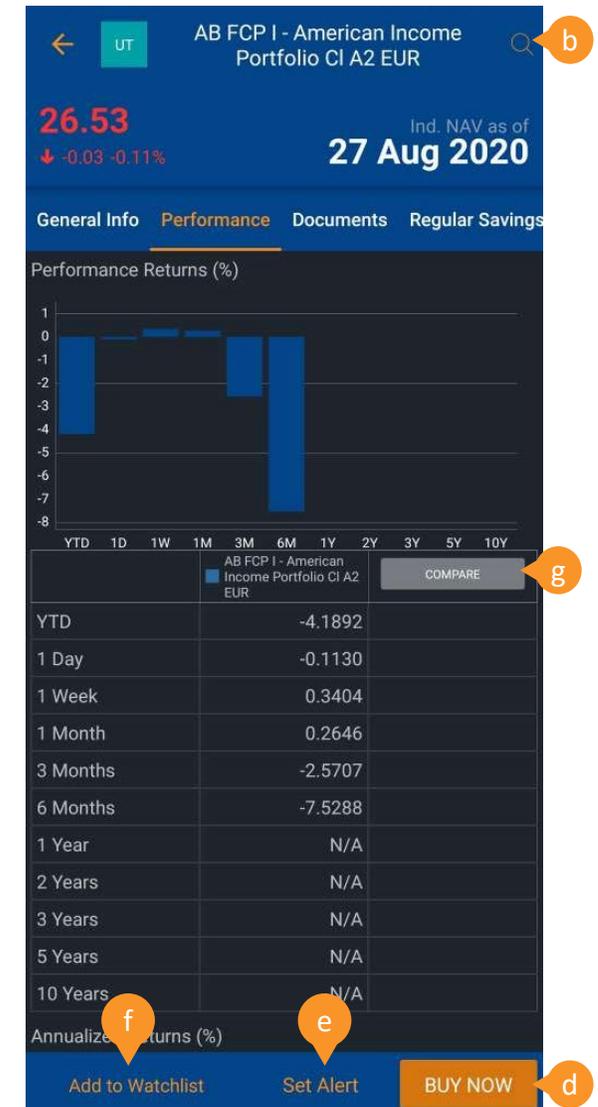
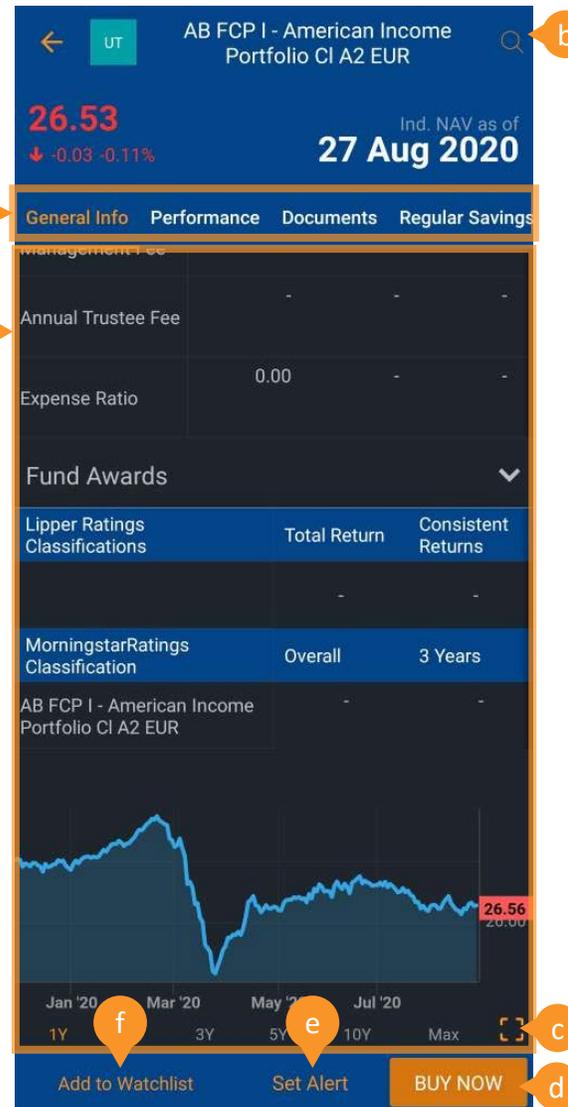
Details (Unit Trust)

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



HOW TO MONITOR THE MARKET

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

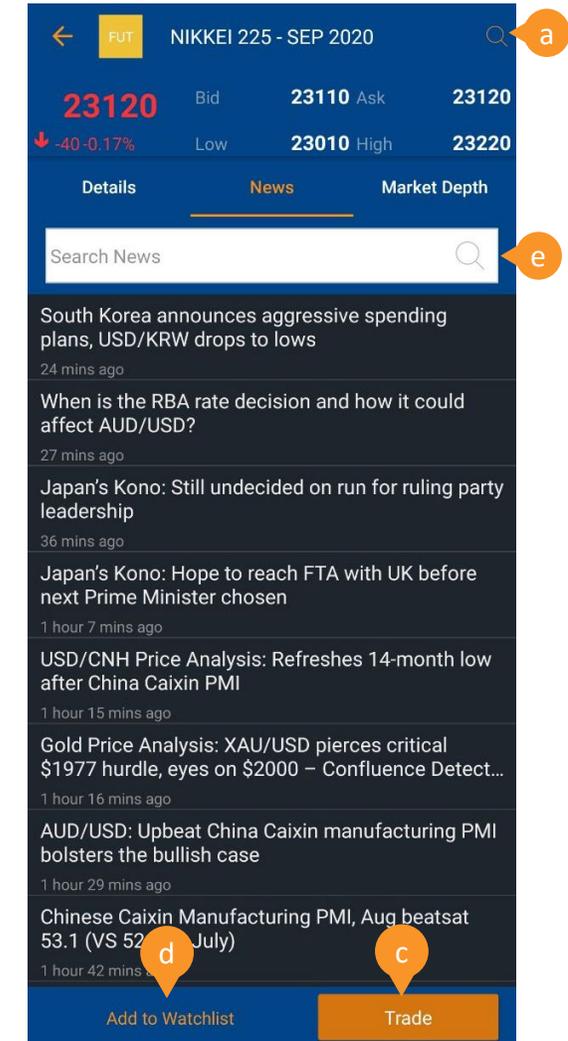
Details (Futures)

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



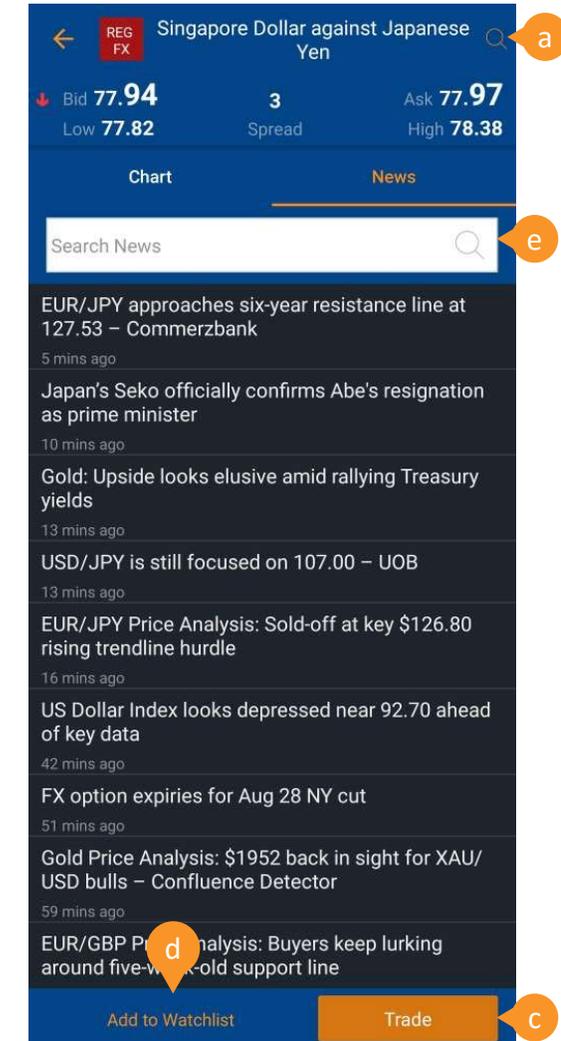
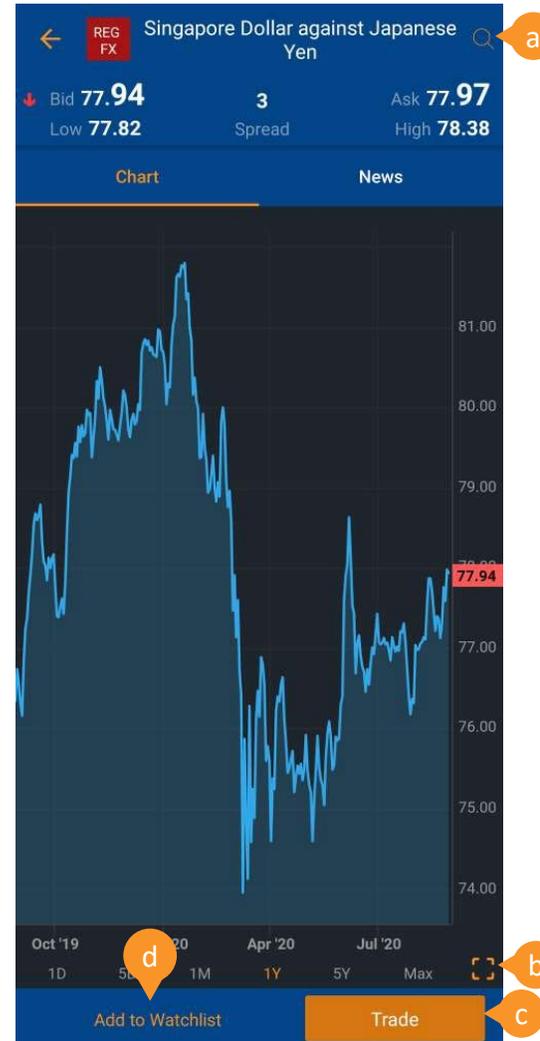
HOW TO MONITOR THE MARKET

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



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

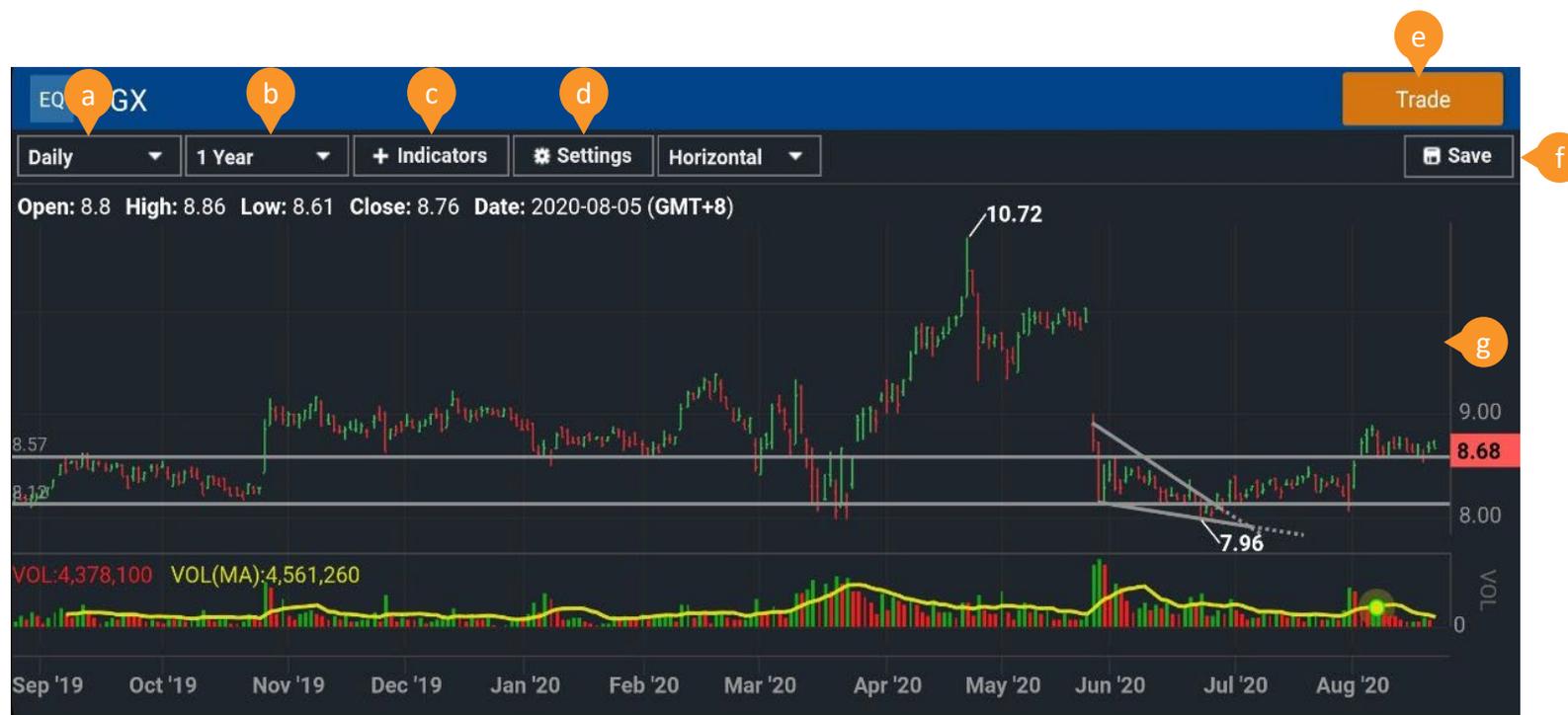
Step 1: Tap and hold on your desired counter to open Contextual Menu*

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

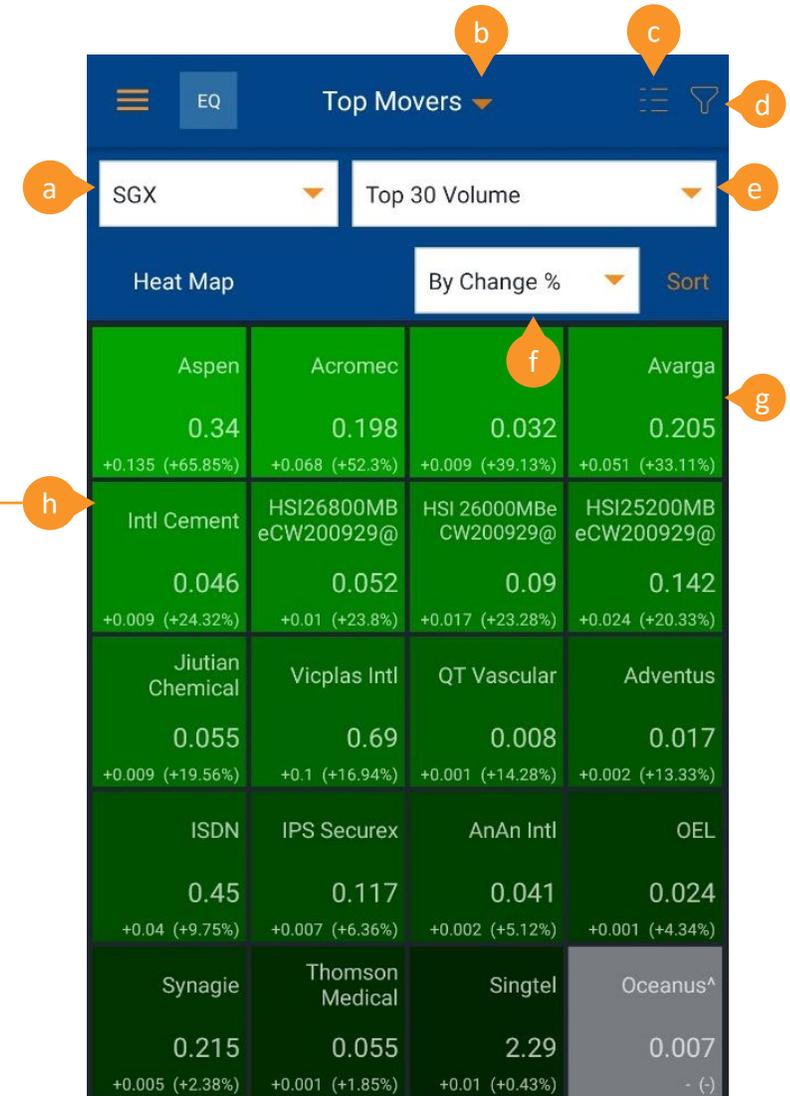
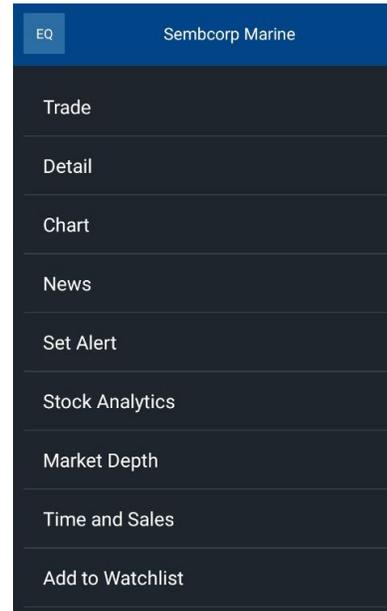
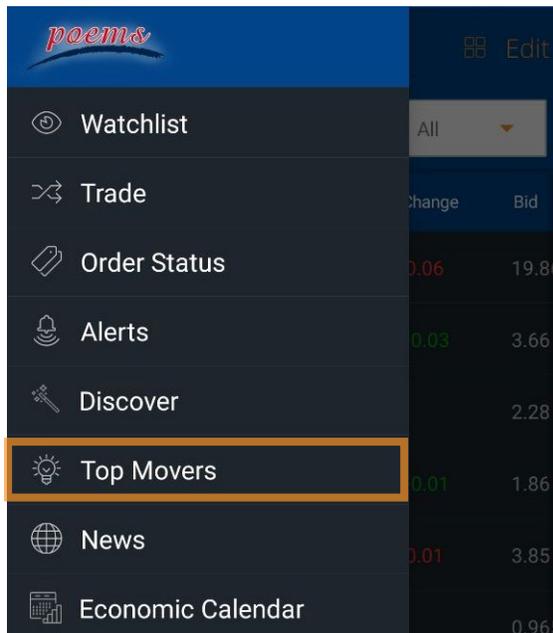
Top Movers

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

*Contextual Menu & Details Screen can be opened via Watchlist and Top Movers modules
 **Note: Enhanced Market Depth is currently only available for SGX

HOW TO MONITOR THE MARKET

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

Market Depth

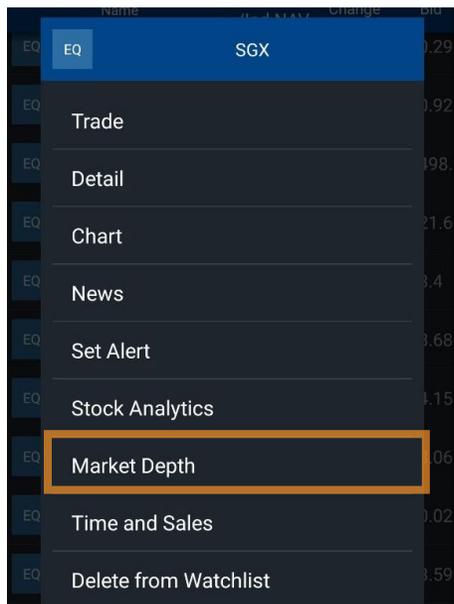
View a total list of the available SGX and HKEx buy/sell prices in the queue

How to get to Market Depth

METHOD 1: Using Contextual Menu*

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

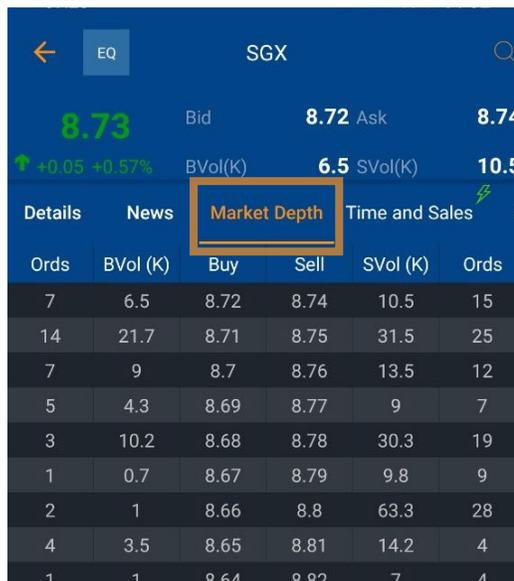
Step 2: Select **Market Depth**



METHOD 2: Using Details Screen*

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

Step 2: Select **Market Depth**



A screenshot of the Market Depth screen for the SGX counter. The screen shows a table of orders with columns for Ords, BVol (K), Buy, Sell, SVol (K), and Ords. Callouts 'a', 'b', and 'c' are placed over the table to indicate specific data points.

Ords	BVol (K)	Buy	Sell	SVol (K)	Ords
7	6.5	8.72	8.74	10.5	15
14	21.7	8.71	8.75	31.5	25
7	9	8.7	8.76	13.5	12
5	4.3	8.69	8.77	9	7
3	10.2	8.68	8.78	30.3	19
1	0.7	8.67	8.79	9.8	9
2	1	8.66	8.8	63.3	28
4	3.5	8.65	8.81	14.2	4
1	1	8.64	8.82	7	4
4	11.2	8.63	8.83	6.7	3

- 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

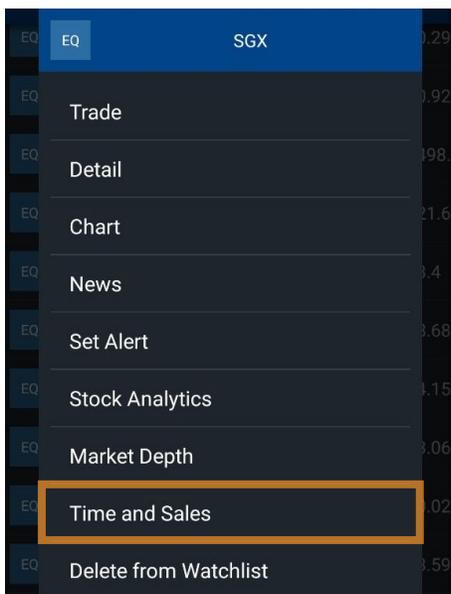
View time and sales data of specific counters

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

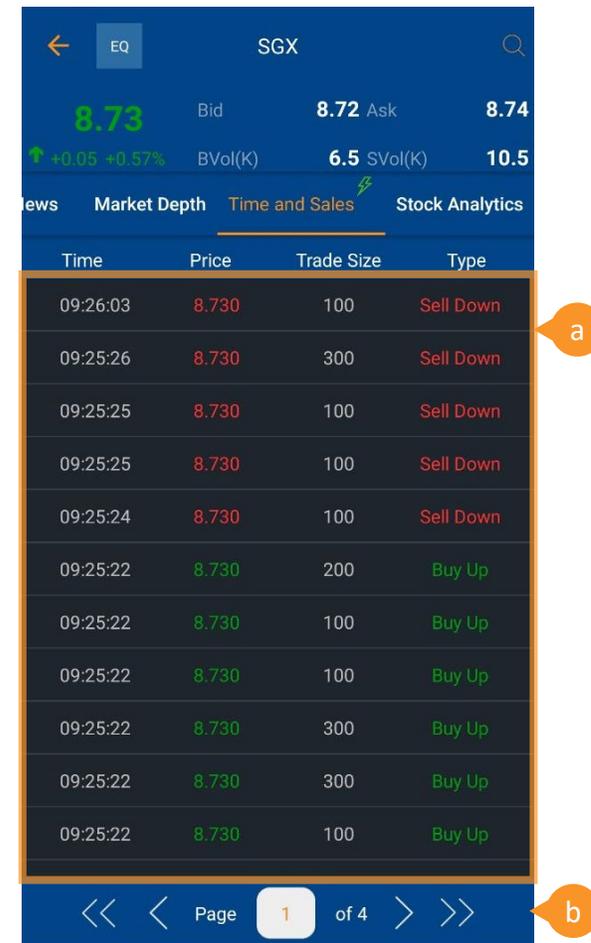
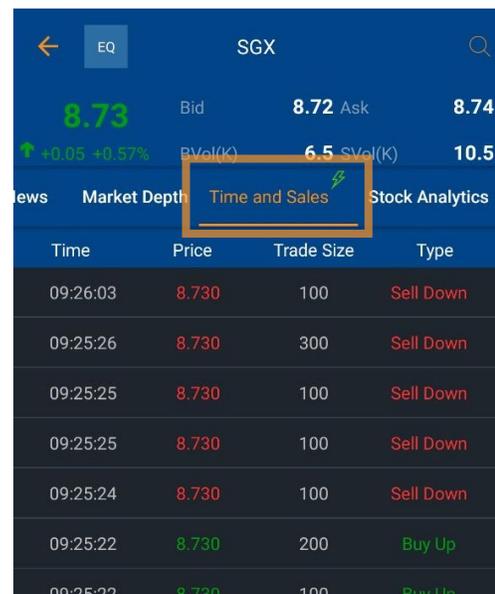
Step 2: Select **Time and Sales**



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

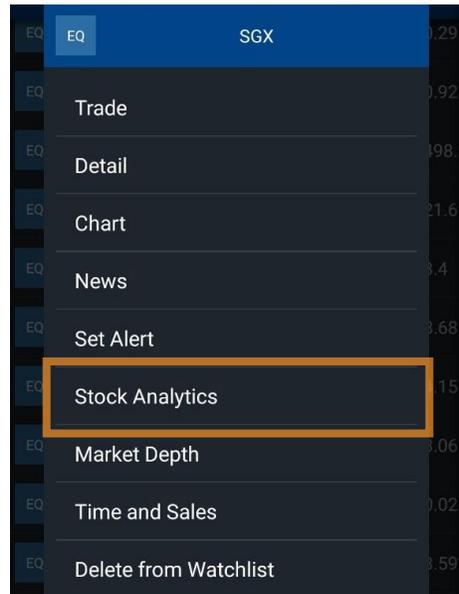
Phillip Stock Analytics gives you insights to listed companies' fundamental, valuations and operating performance

How to get to Stock Analytics

METHOD 1: Using Contextual Menu*

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

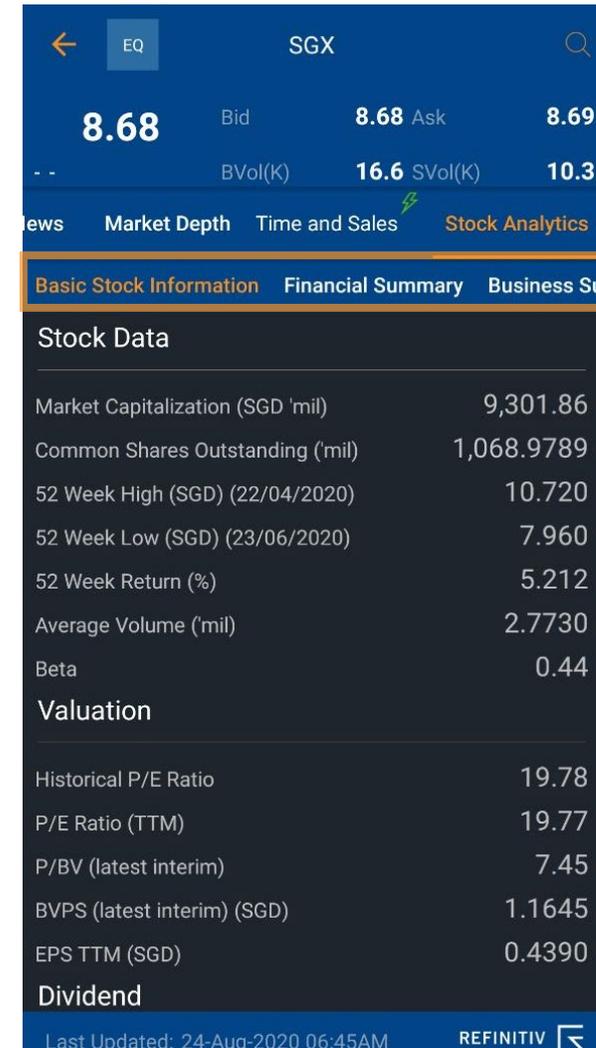
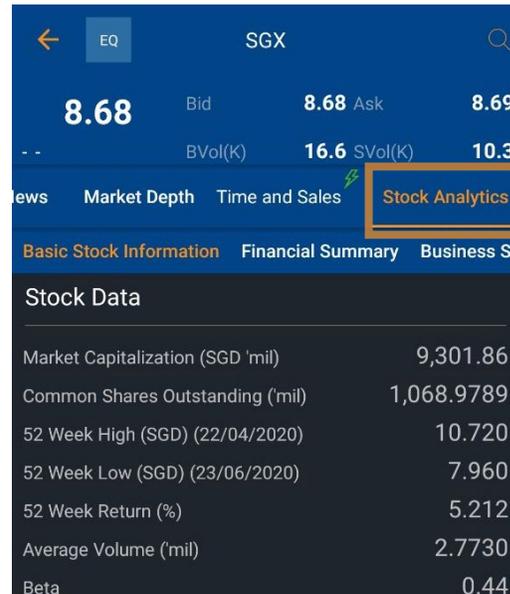
Step 2: Select **Stock Analytics**



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

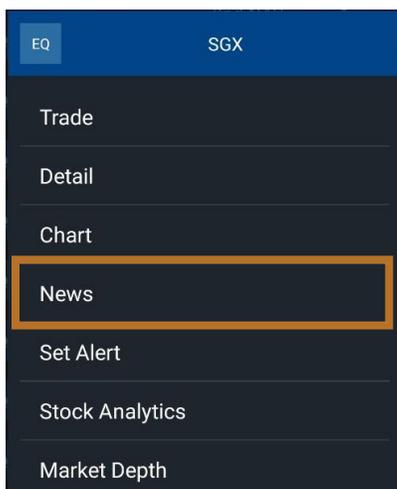
Stay up to date with news aggregated from various news sources and research reports by our in-house experts

How to get to News

METHOD 1: Using Contextual Menu*

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

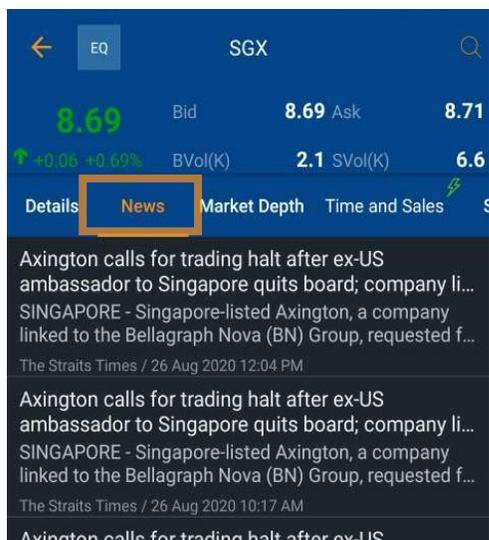
Step 2: Select **News** to view news related to selected counter



METHOD 2: Using Details Screen*

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

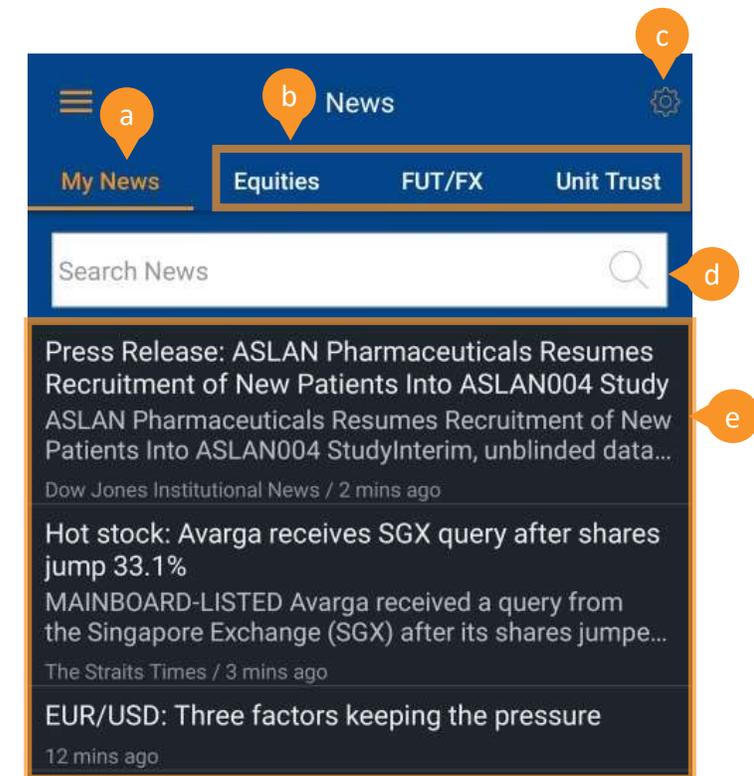
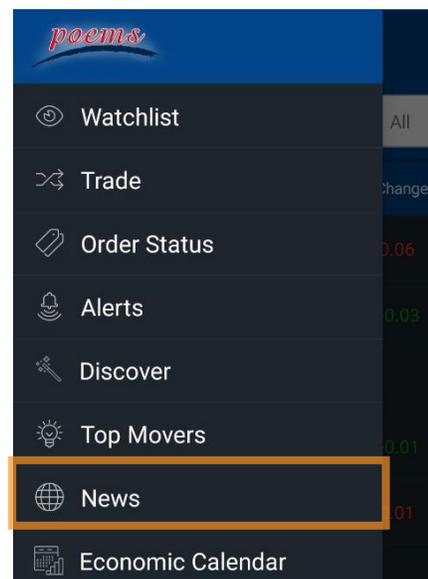
Step 2: Select **News**



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

HOW TO MONITOR THE MARKET

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

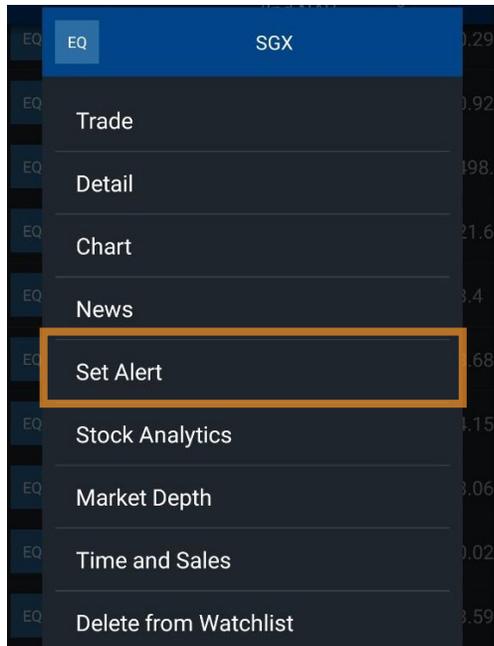
Alerts (Setting Price Alerts)

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**

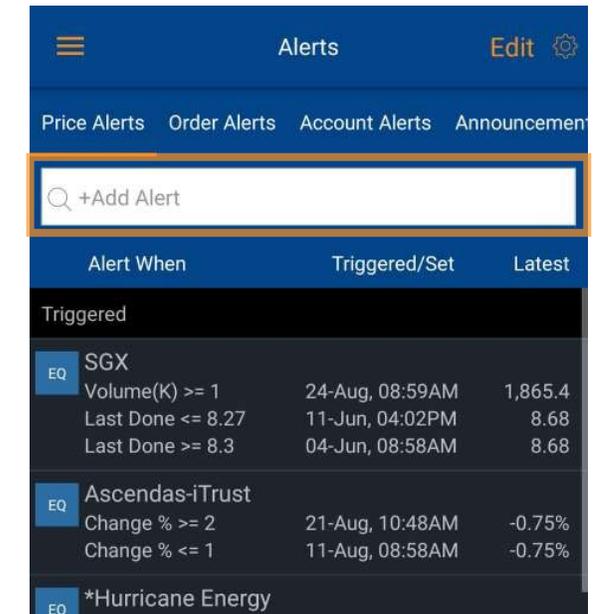


METHOD 3: Using Alert module

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.

Notify me when price hits any of these criteria

↓ Price Target ↑ Price Target

Trigger Based On

Last Done Price

Notify me when daily change% hits any of these criteria

↓ Chg% Target ↑ Chg% Target

Notify me when daily volume reaches

Volume (K) Target

Save

- 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

HOW TO MONITOR THE MARKET

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

Row(s) will be highlighted if you have yet to “read” the alert

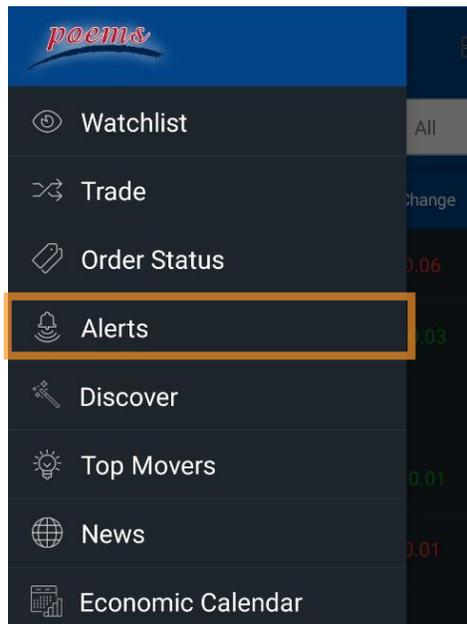
Alerts (View Alerts)

All Price Alerts are synchronized with POEMS 2.0

METHOD 1: Using hamburger menu

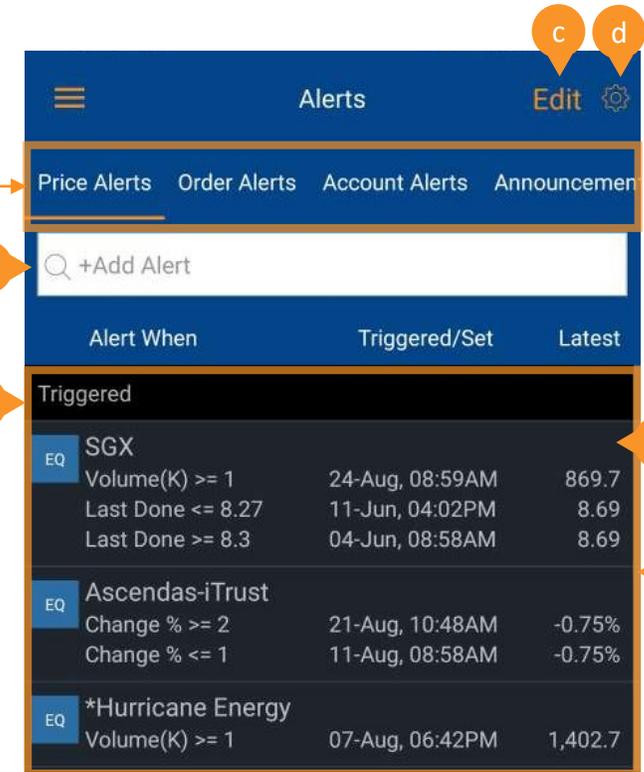
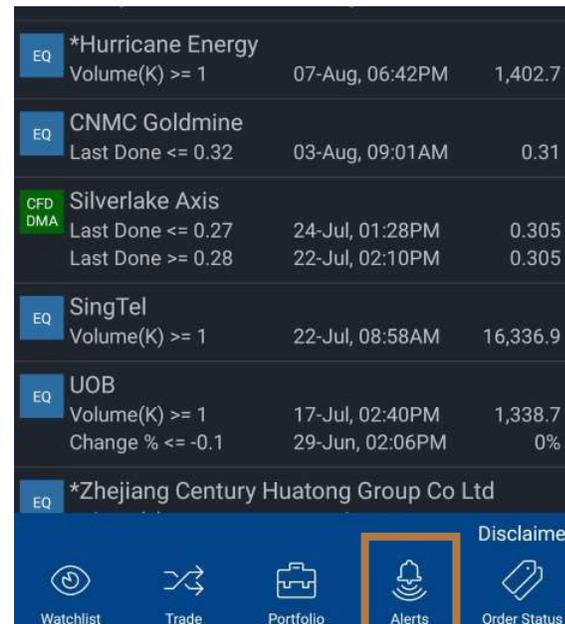
Step 1: Tap on the hamburger menu

Step 2: Select **Alerts**



METHOD 2: Using shortcut bar

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



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

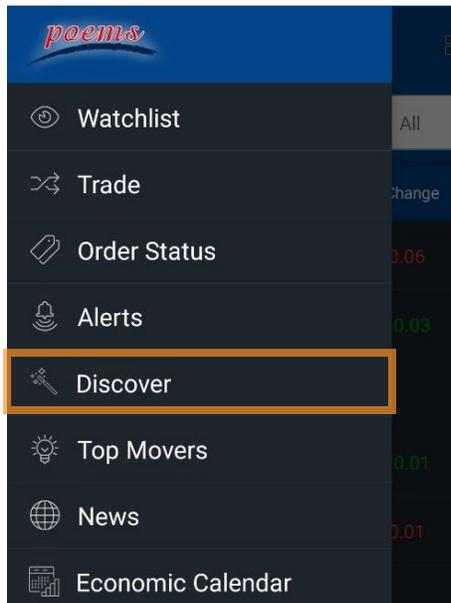
Discover trading insights from counters that are selected using a set of unique AI-powered algorithms that are tailored to your investment portfolio

How to get to Discover module

METHOD 1: Using hamburger menu

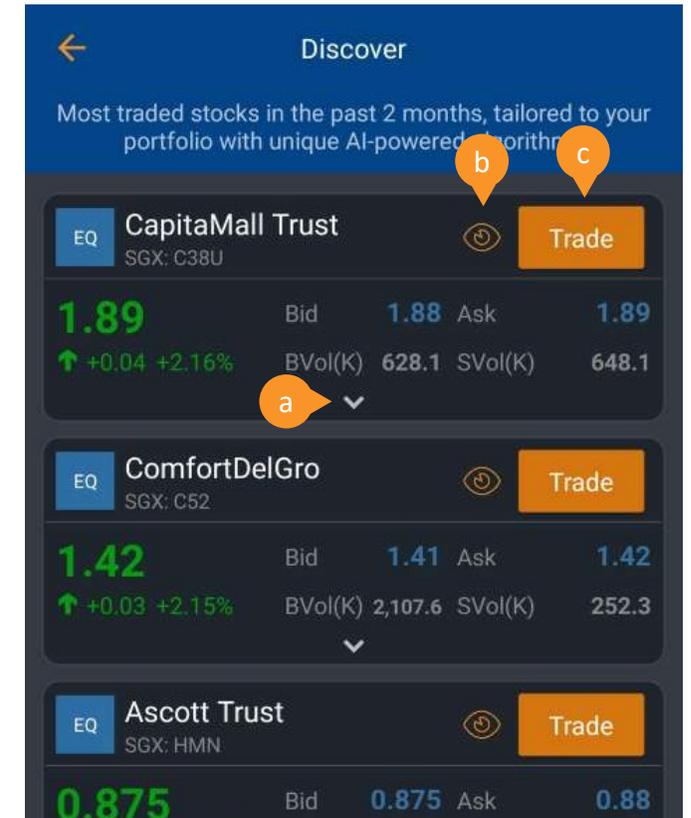
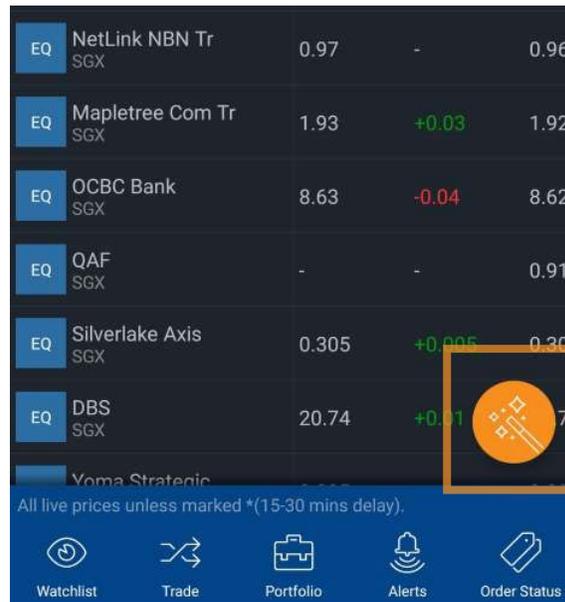
Step 1: Tap on the hamburger menu

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**

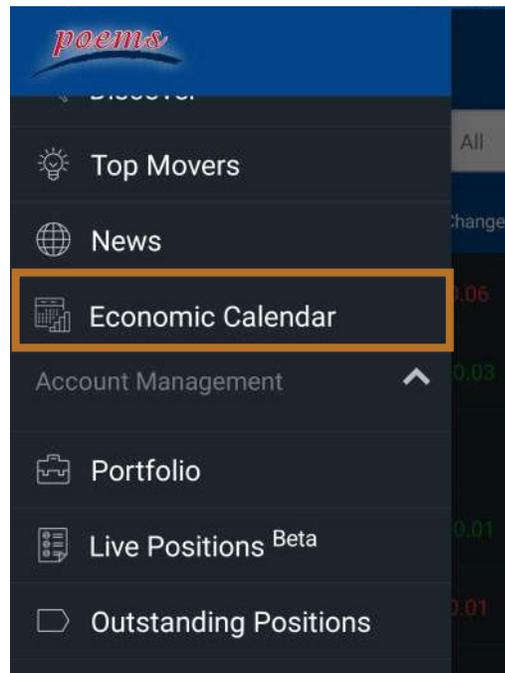
Economic Calendar

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**



in 1d 3h 55m ago

Consumer Price Index (YoY)

Aug 24, 13:00

SG	-0.4	-0.65	-0.5
<input type="checkbox"/>	ACTUAL	CONSENSUS	PREVIOUS

The Consumers Price Index (CPI), released by [Statistics Singapore](#), measures the rate of price change of goods and services purchased by households. It measures changes in the average level of prices over a period of time. Consumer Price Index is the most frequently used indicator of inflation and reflect changes in the cost of acquiring a fixed basket of goods and services by the average consumer.

- a. Tap on any event to get more details
- b. View present, recent and upcoming events
- c. Filter events by volatility, country and category

Economic Calendar

RECENT & NEXT TODAY THIS WEEK

MONDAY, AUG 24

13:00	Consumer Price Index (YoY)			
SG	-0.4	-0.65	-0.5	
<input type="checkbox"/>	ACTUAL	CONSENSUS	PREVIOUS	

20:30	Chicago Fed National Activity Index			
US	1.18	2.73	4.11	
<input type="checkbox"/>	ACTUAL	CONSENSUS	PREVIOUS	

23:30	3-Month Bill Auction			
US	0.1%	N/A	0.105%	
<input type="checkbox"/>	ACTUAL	CONSENSUS	PREVIOUS	

23:30	6-Month Bill Auction			
US	0.12%	N/A	0.12%	
<input type="checkbox"/>	ACTUAL	CONSENSUS	PREVIOUS	

HOW TO TRADE

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

Trade

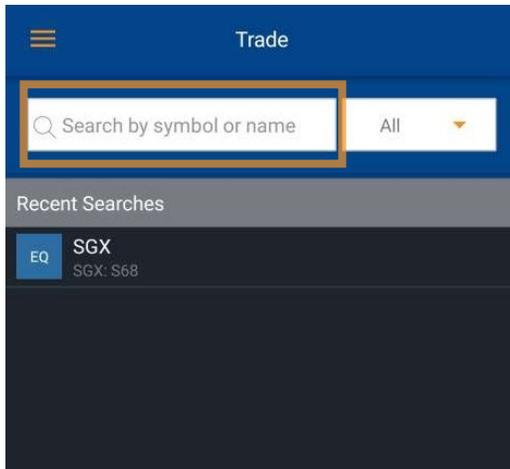
Four methods to open Trade Ticket in POEMS Mobile 2.0

METHOD 1: Using Trade module

Step 1: Tap on **Trade** using the

hamburger menu or shortcut bar

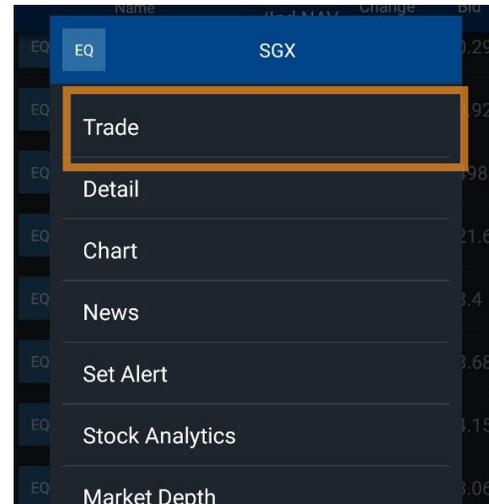
Step 2: Search for the counter you want to trade



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

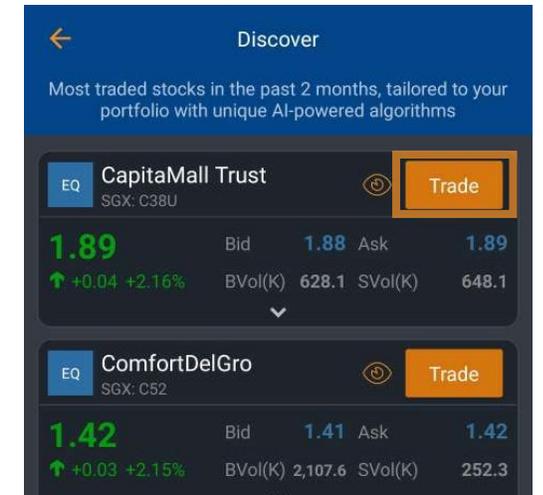
Step 2: Tap on **Trade**



METHOD 4: Using Discover module

Step 1: Tap on **Discover** using hamburger menu

Step 2: Select **Trade**



HOW TO 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

The screenshot shows the Trade widget interface with the following fields and callouts:

- a:** Order Type dropdown menu (set to Limit).
- b:** Action buttons: Buy (highlighted), Short Sell, Sell.
- c:** Limit Price input field (8.65).
- d:** Force Key checkbox (unchecked).
- e:** Payment Type dropdown menu (Cash).
- f:** Validity dropdown menu (Day).
- g:** Password Confirmation input field.
- h:** Summary bar showing Avail. Cash (0 SGD), Buy Limit Bal. (10,000 SGD), and Sell Limit Bal. (10,000 SGD).
- i:** Buy button.
- j:** Settlement Currency dropdown menu (SGD).
- k:** Gross Value display (0 SGD).
- l:** Quantity input field.

The screenshot shows the Preview Order confirmation window with the following details and callouts:

- m:** Back arrow button.
- n:** Order details section:

Order Type	Limit
Action	BUY
Limit Price	8.65 SGD
Quantity	1,000
Gross Value	8,650 SGD
Payment Type	Cash
Settlement Currency	SGD
Validity	Day
- o:** Submit button.

- 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

HOW TO TRADE

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

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

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

The screenshot shows the 'Trade (CFD)' widget with the following details:

- Order Type:** Limit Order (selected)
- Action:** Buy (selected)
- Limit Price:** 0.73118
- Quantity:** 1
- Currency:** USD
- X 10K:** (indicated below quantity)
- 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

Annotations: 'a' points to Order Type, 'b' to Action, 'c' to Limit Price, 'd' to Validity, 'e' to Password Confirmation, 'f' to Buy button, and 'g' to Quantity.

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

The screenshot shows the 'Preview Order' confirmation window with the following details:

- 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

Annotations: 'h' points to the back arrow, and 'i' points to the order details. The 'Submit' button is labeled 'j'.

HOW TO TRADE

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

The screenshot shows the 'Trade (Futures)' widget with the following fields and labels:

- a**: Order Type dropdown menu set to 'Limit'.
- b**: Action buttons for 'BUY' (green) and 'SELL' (grey).
- c**: Limit Price input field containing '23,100'.
- g**: Quantity input field containing '1'.
- d**: Validity dropdown menu set to 'Day'.
- e**: Password Confirmation input field containing 'Password'.
- f**: A green 'Buy' button at the bottom.

Additional information displayed in the widget includes:

- Initial Margin: 1,080,000 JPY
- Maintenance Margin: 1,080,000 JPY
- Lot Size: 1
- Balance: 12,165.46 SGD
- Margin Excess/Deficit: 11,321.65 SGD
- Utilization: 6.94%

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

The screenshot shows the 'Preview Order' confirmation window with the following details:

- h**: Back arrow and 'FUT' indicator.
- Market: NIKKEI 225 - SEP 2020
- Current Price: 23100 (red)
- Bid: 23090, Ask: 23100
- Change: -60 -0.26%
- Low: 23010, High: 23220
- i**: 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
- j**: A green 'Submit' button at the bottom.

Additional information displayed at the bottom of the window:

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

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

The screenshot shows the 'Trade (Forex)' widget with the following fields and labels:

- a**: Order Type dropdown menu (set to Limit)
- b**: Action buttons (BUY and SELL)
- c**: Price input field (1,986.1)
- g**: Quantity input field (1)
- d**: Validity dropdown menu (set to Day)
- e**: Password Confirmation input field (Password)
- f**: Buy button at the bottom

Additional information displayed in the widget:

- Currency: USD, X 1000Z
- Initial Margin: 39,711.6 USD
- Maintenance Margin: 39,711.6 USD
- Balance: 12,165.46 SGD
- Margin Excess/Deficit: 11,321.65 SGD
- Utilization: 6.94%

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

The screenshot shows the 'Preview Order' confirmation window with the following details:

- h**: Back arrow and REG FX indicator
- Loco London Gold
- Bid: 1985.55, Low: 1965, Spread: 60, Ask: 1986.15, High: 1989.45
- 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
- j**: Submit button at the bottom

Additional information displayed at the bottom:

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

HOW TO TRADE

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

Order Status

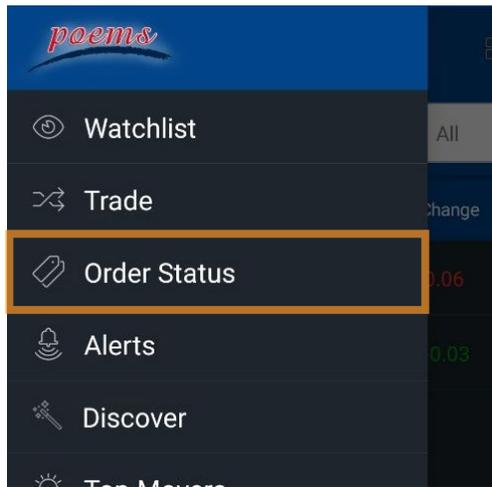
View your working and past orders in the Order Status tab

How to check Order Status

METHOD 1: Using hamburger menu

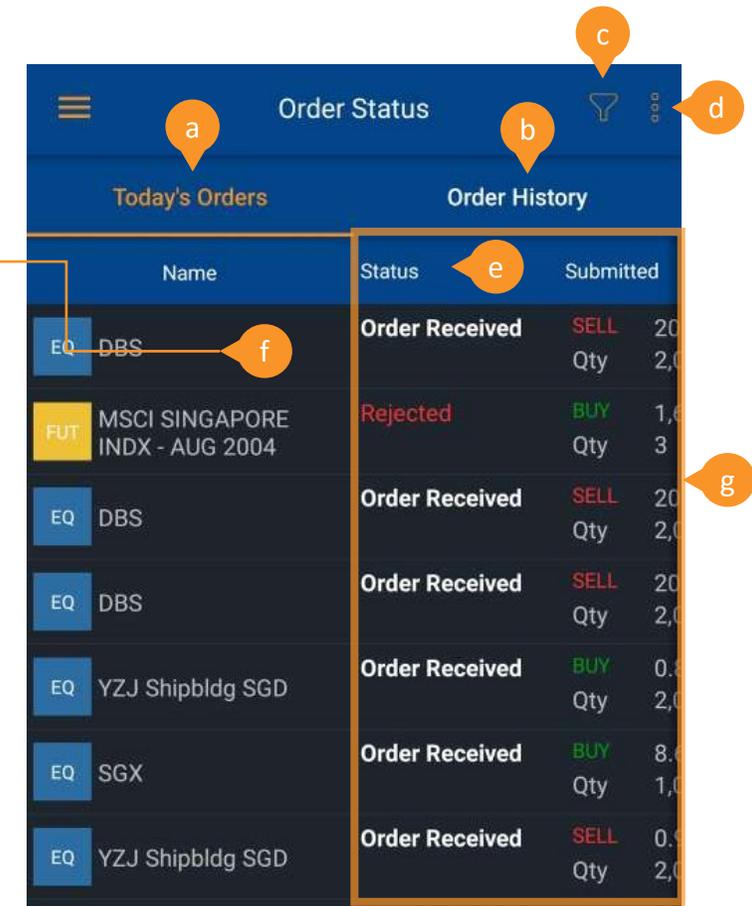
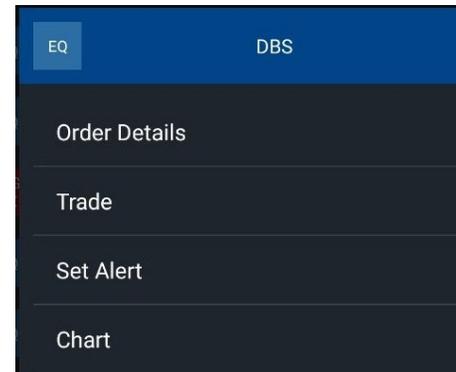
Step 1: Tap on the hamburger menu

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)

HOW TO TRADE

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

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

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

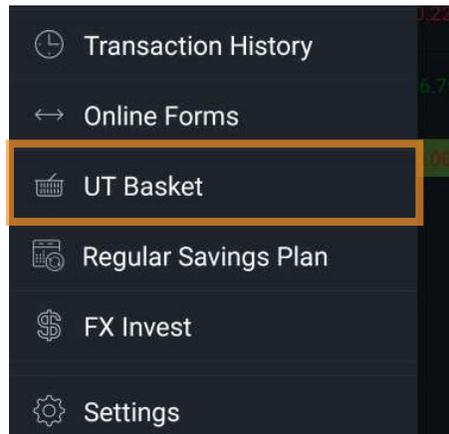
UT Basket

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**



The image shows two screenshots of the UT Basket interface. The left screenshot is titled 'Basket (2)' and shows a list of funds. The right screenshot is titled 'Confirm Basket Order' and shows the same funds with a 'Submit' button.

Basket (2) - Buy Orders

Fund	Currency/Source	Investment Amount
UT BlackRock Next Gen Tech Fd A2 EUR H	EUR Cash	3,000
Total EUR Amount		3,000
UT Aberdeen Standard Asian Smaller Co Fund	SGD Cash	1,000
Total SGD Amount		1,000

Available Cash in Account: 0 SGD

Confirm Basket Order

Fund	Currency/Source	Investment Amount
UT BlackRock Next Gen Tech Fd A2 EUR H	EUR Cash	3,000
Total EUR Amount		3,000.00
UT Aberdeen Standard Asian Smaller Co Fund	SGD Cash	1,000
Total SGD Amount		1,000.00

Notice: Units are priced on forward basis. Issue price cannot be calculated at the time of application.

Client's Declaration: I declare that I would like to receive

No Financial Advice

I am aware that all investment products involve risk and I should seek advice from a licensed or exempt financial adviser before investing in any investment product. I should consider whether the investment product in question is suitable for me. I would be waiving my rights under the Financial Advisers Act if I choose to invest in investment products without receiving advice. I will have to assess the product(s) myself and consider the product suitability with reference to my own financial objective(s), particular needs and risk preference to decide on the investment.

Available Cash in Account: 0 SGD

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

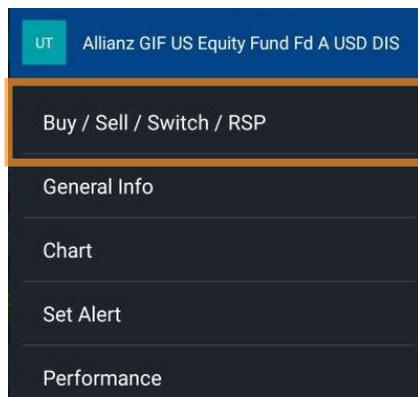
METHOD 1: Using Contextual Menu*

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**

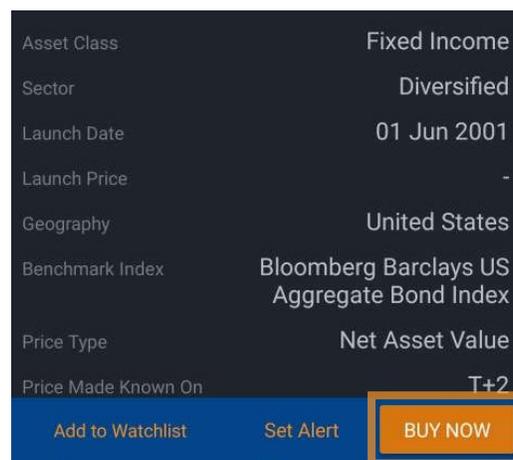


METHOD 2: Using Details Screen*

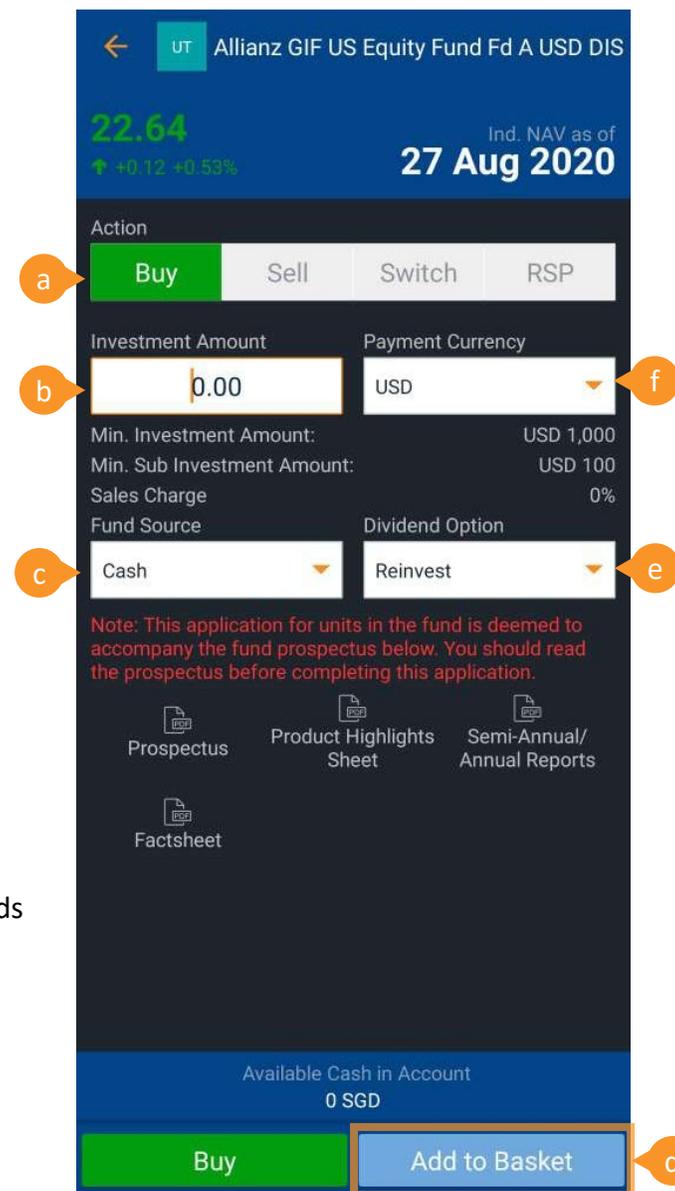
Step 1: Tap on your desired counter to open Details Screen

Step 2: Tap on **BUY NOW**

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



- Select Action Type
- Enter the desired investment amount
- Select Fund Source
- Tap on Add to Basket to continue shopping for funds before buying
- Select Dividend Option (Withdraw/Reinvest)
- Select Payment Currency



HOW TO TRADE

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

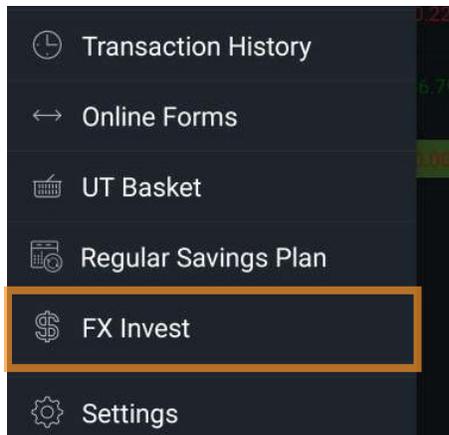
FX Invest

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**



FX Invest (Rates)

A screenshot of the 'FX Invest (Rates)' screen. It features a top navigation bar with 'Rates', 'Transaction History', and 'Equity Balance'. Below the navigation is a 'Watchlist1' dropdown and an 'Edit' button. A search bar contains '+Add Instrument to Watchlist'. The main content is a table of currency pairs with columns for 'Currency Pair', 'Bid', 'Offer', and 'High'. Callouts 'a' through 'i' point to various UI elements: 'a' points to the Watchlist dropdown, 'b' to the Edit button, 'c' to the currency pair selection, 'd' to the Bid/Offer/High columns, 'e' to the Today's Order dropdown, 'f' to the FX Invest section, 'g' to the Account Name field, 'h' to the Available Funds column, and 'i' to the Withdraw Funds button.

Currency Pair	Bid	Offer	High
JPY SGD	1.2453	1.2493	1.247
USD CNH	6.6649	6.6689	6.670
AUD NZD	1.0833	1.0873	1.083
AUD JPY	86.16	86.56	86.7
GBP SGD	1.7454	1.7494	1.754
USD SGD	1.3609	1.3639	1.361

- View different watchlists (maximum 5 watchlists)
- Edit watchlist
- Tap on respective Bid and Offer prices to select your currency conversion
- Movable panel (scroll left and right to view more information)
- Tap to toggle between different historical periods
- Toggle to expand/collapse transactions
- View your Full Account details here
- Available Funds are specific to your Futures trading account
- Tap to Withdraw Fund (Zero funds or Restricted currencies will be greyed out and are non-withdrawable)

FX Invest (Transaction History)

A screenshot of the 'FX Invest (Transaction History)' screen. It features a top navigation bar with 'Rates', 'Transaction History', and 'Equity Balance'. Below the navigation is a 'Today's Order' dropdown. The main content is a table of transactions with columns for 'CCY/Option Order No.', 'Status', and 'Price'. Callouts 'e' through 'i' point to various UI elements: 'e' to the Today's Order dropdown, 'f' to the FX Invest section, 'g' to the Account Name field, 'h' to the Available Funds column, and 'i' to the Withdraw Funds button.

CCY/Option Order No.	Status	Price
FX Invest		
USDSGD 1248	Done	1.3635
JPYSGD 1236	Order Received	1.2475
JPYSGD 1230	Order Received	1.3000
USDCAD 1229	Done	1.2542
GBPSGD 1228	Done	1.7517
USDSGD 1224	Done	1.3625

FX Invest (Equity Balance)

A screenshot of the 'FX Invest (Equity Balance)' screen. It features a top navigation bar with 'Rates', 'Transaction History', and 'Equity Balance'. Below the navigation is a section for account details: 'Account Name : PHILLIP FUTURES PTE LTD testing purpose', 'Account No. : ABC1234', and 'Account Balance : 12165.46 SGD'. The main content is a table of currencies with columns for 'Currency', 'Available Funds', and 'Withdraw Funds'. Callouts 'g' through 'i' point to various UI elements: 'g' to the Account Name field, 'h' to the Available Funds column, and 'i' to the Withdraw Funds button.

Currency	Available Funds	Withdraw Funds
	0.04	Withdraw Funds
CAD	277.37	Withdraw Funds
EUR	15.34	Withdraw Funds
HKD	14,410.00	Withdraw Funds
IDR	10,000.00	Withdraw Funds
MYR	10,000.00	Withdraw Funds
SGD	348.13	Withdraw Funds
THB	10,000.00	Withdraw Funds

HOW TO MANAGE YOUR ACCOUNT

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

Portfolio

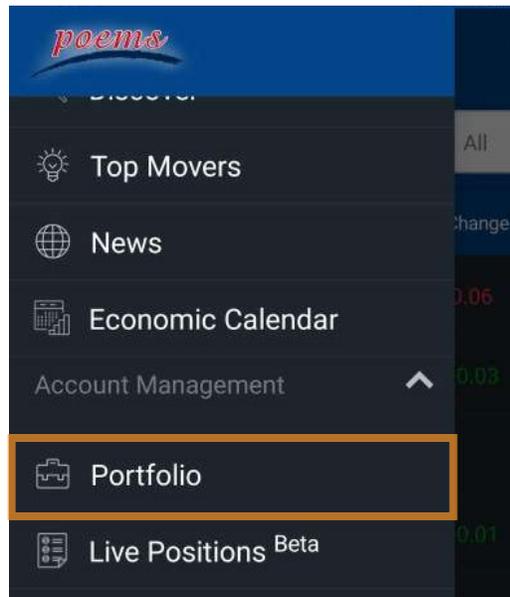
Monitor and manage your investments on-the-go and get a quick breakdown of your portfolio by different asset classes

How to view Portfolio

METHOD 1: Using hamburger menu

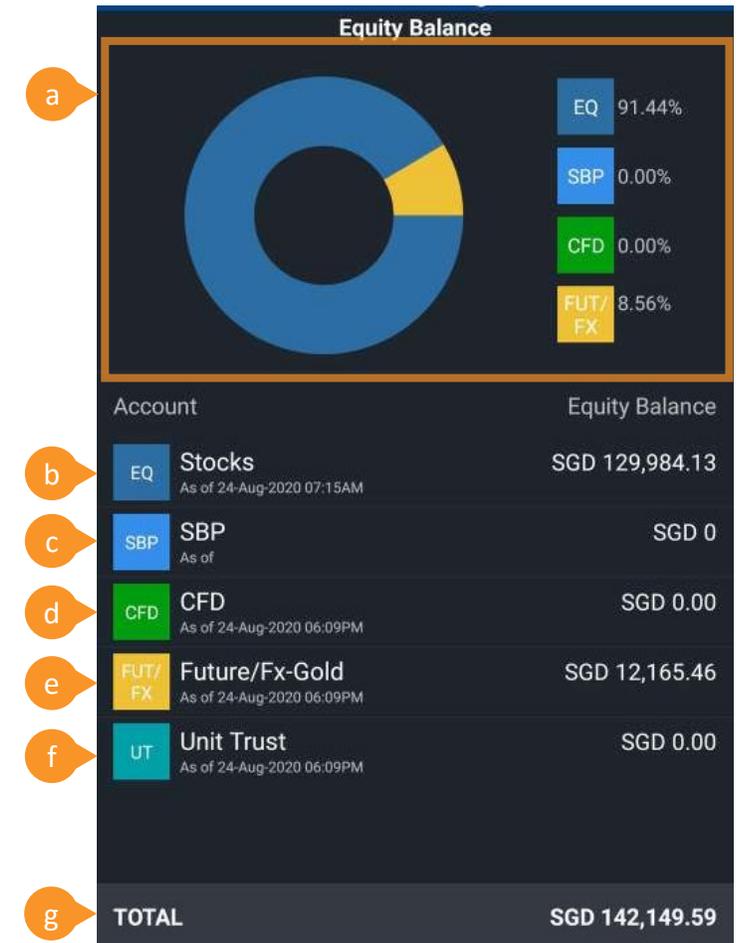
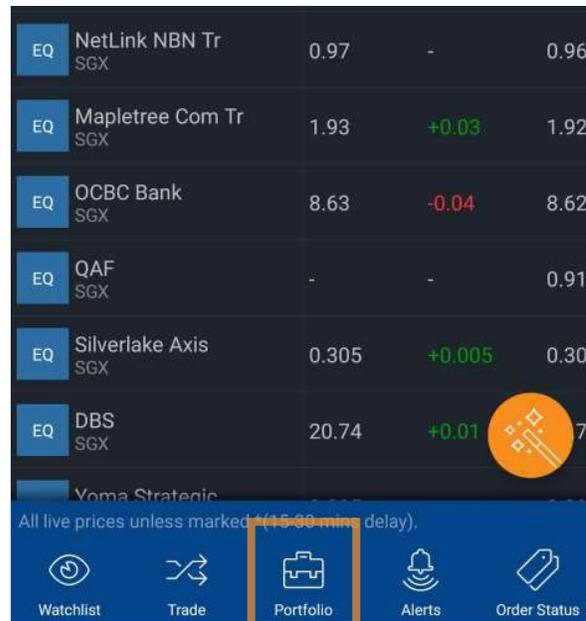
Step 1: Tap on the hamburger menu

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

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

Portfolio (Account Details)

Description	SGD
Balance as of yesterday (a)	-277,553.87
Fund received today (b)	0
Opening Balance today (a+b)	-277,553.87
Items due for settlement (c)	0
Available Balance (a+b) + (c)	0
All Items Outstanding (d)	3,011.59
Net Amount (a+b) + (d)	0
Total Asset Value (Open)	437,259

a. Switch between different asset classes

Portfolio (Holdings)

Name	Unrealized P/L	Qty on Hand (a)
SGX		
EQ ASCENDAS INDIA TRUST	90.703	16,074
EQ ASIAN PAY TELEVISION TRUST	1.205	63
EQ BUND CENTER INVESTMENT LTD	156.089	13,089
EQ ARA LOGOS LOGISTICS TRUST	0	0
EQ CAPITALAND LIMITED	0.717	19
EQ CAPITALAND MALL TRUST	-2.531	37
EQ CHINA SPORTS INTL LIMITED	-4.715	26

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

Portfolio (Realised P/L)

Name	Contract Date	Contract No.
EQ DBS	21/05/2020	wwltb2
EQ DBS	27/07/2020	wwltestsell
EQ Genting Sing	07/07/2020	wwwbuy11
EQ Genting Sing	15/07/2020	wwlsell11
Total Profit (SGD)		

c. Filter by month

HOW TO MANAGE YOUR ACCOUNT

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

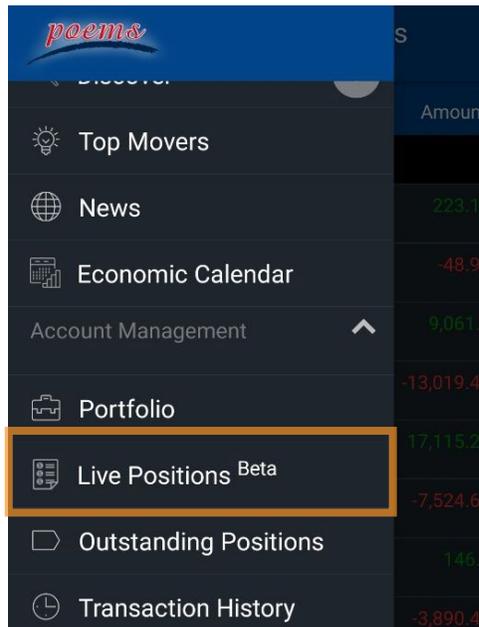
Live Positions (Beta*)

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**



Note:

For Cash Plus / Margin / Prepaid Custodian account - you will be able to view your existing net holdings (Settled Positions + Outstanding Positions) in Live Positions.

If you are not holding a Cash Plus / Margin / Prepaid Custodian account, only Intraday trades will be showing here.

The screenshot shows the 'Live Positions Beta' interface. At the top, there is a filter icon (a) and a table with columns: Name, Unrealized P&L, Stock Code, Trade Currency, Open Qty, Open Qty Cost, and Average Price. The table lists three positions: AVIC, CEI LIMITED, and CHUAN HUP HOLDINGS LIMITED. A total row at the bottom shows 'Total (SGD) -741,488.50'. Callout 'b' points to the table header, and callout 'c' points to the 'Open Qty' column.

Name	Unrealized P&L	Stock Code	Trade Currency	Open Qty	Open Qty Cost	Average Price
SGX						
AVIC	-	-	SGD	475,000	46,013.57	0.096
CEI LIMITED	-4,477.67	AVV	SGD	35,000	36,677.67	1.047
CHUAN HUP HOLDINGS LIMITED	-2,476.187	C33	SGD	50,000	13,226.18	0.264
Total (SGD) -741,488.50						

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

HOW TO MANAGE YOUR ACCOUNT

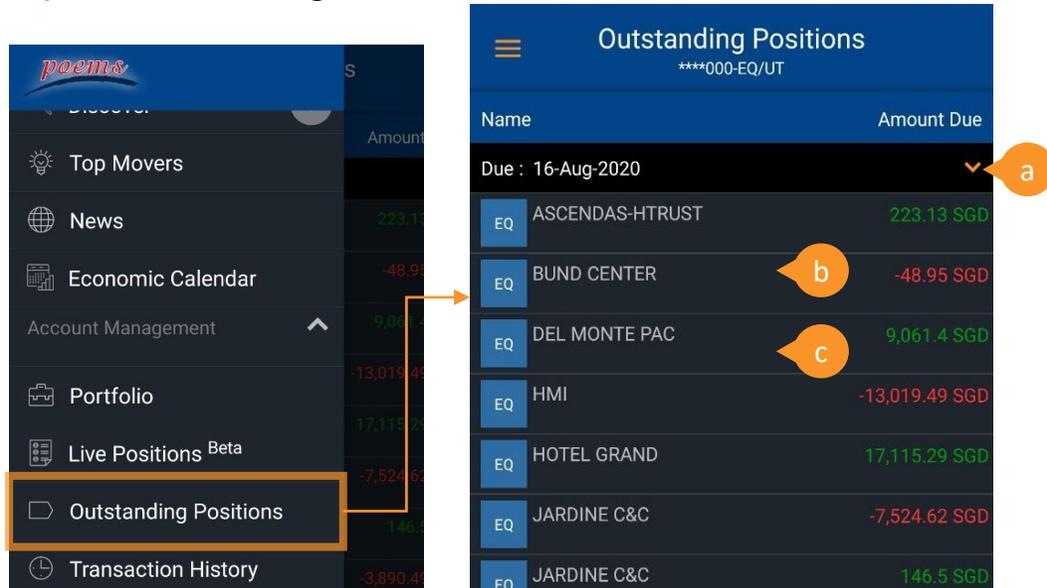
Portfolio | Live Positions | **Outstanding Positions** | Transaction History | Online Forms

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**



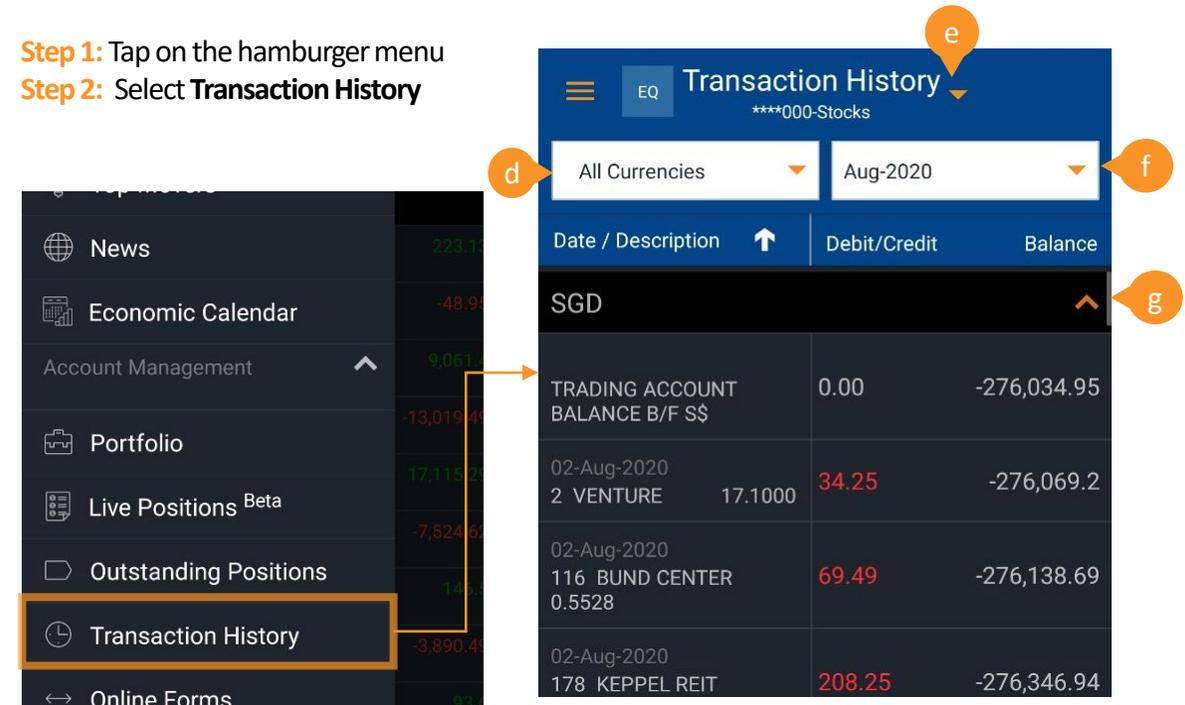
- a.** Tap to expand or shrink outstanding position by day
- b.** Tap on your desired counter to open Position Details

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**



- 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

HOW TO MANAGE YOUR ACCOUNT

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

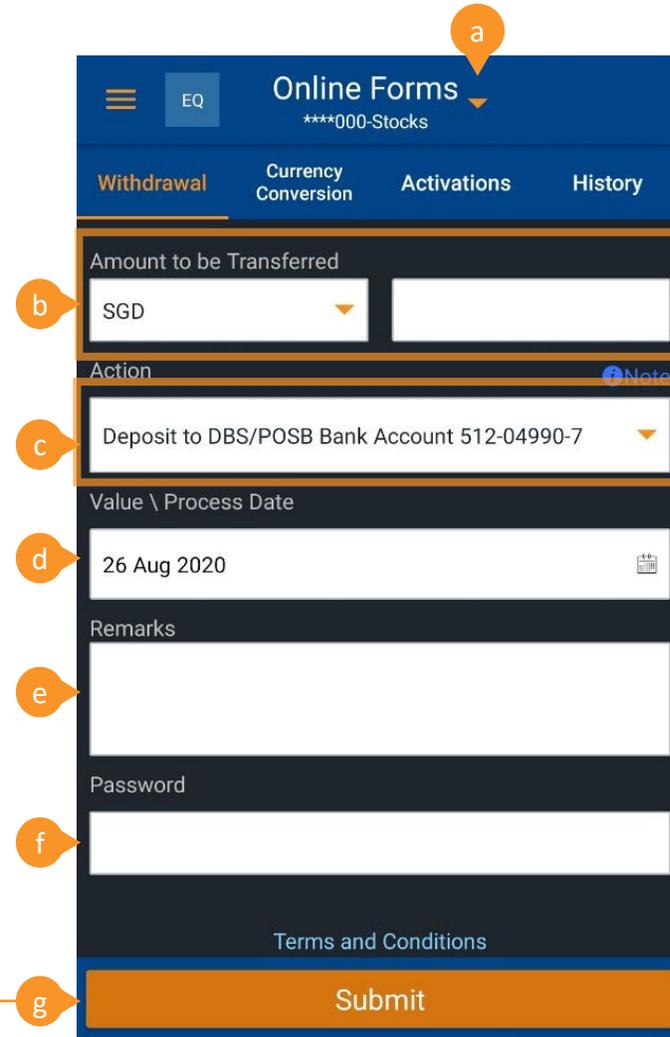
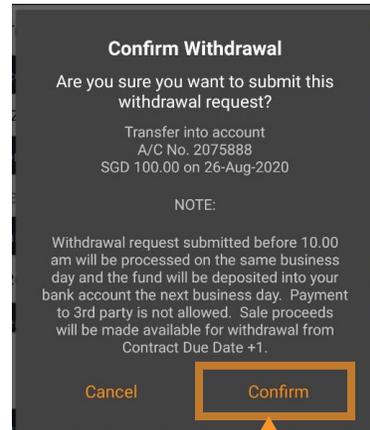
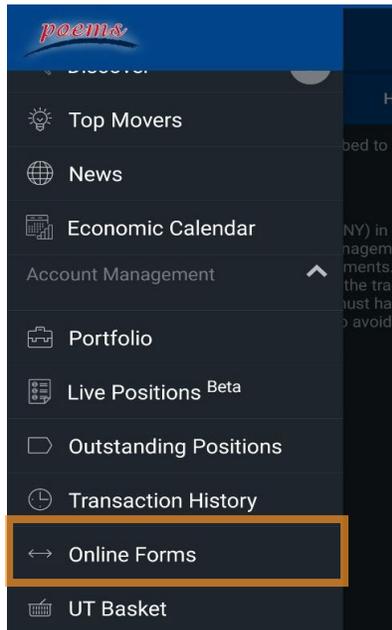
Online Forms (Withdrawal)

Online forms for withdrawal, currency conversion, activations and history

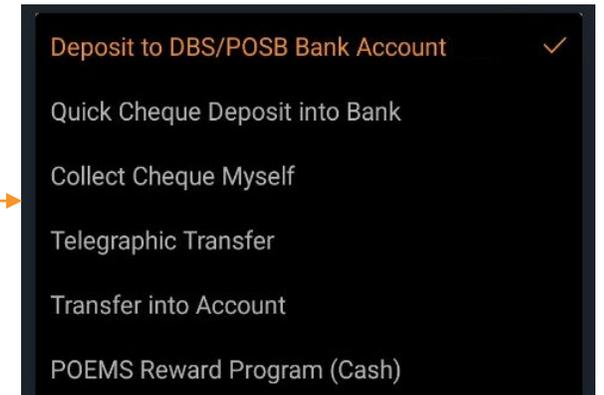
How to get to Online Forms

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

HOW TO MANAGE YOUR ACCOUNT

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

Online Forms (Currency Conversion)

Online forms for withdrawal, currency conversion, activations and history

EQ Online Forms
****000-Stocks

Withdrawal **Currency Conversion** Activations History

Notice: Your account is currently not subscribed to Multi-Currency Facility.

Multi-Currency facility is an advantage for you to maintain foreign currency balances (USD, HKD, AUD, MYR, JPY, GBP, EUR, CAD and CNY) in your account for ease of trading and efficient management of your foreign currency denominated investments. Settlement for these shares can either be in the traded currency or in SGD. However, your account must have sufficient funds in the settlement currency to avoid incurring interest on debit balances.

Opt-in to Multi-Currency

Note

Terms and Conditions

Submit

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

- Tap to select different asset classes
- Select conversion action
- Key the amount you would like to convert from and to
- Select the date to process this request
- Enter any applicable remarks
- Enter your password to proceed
- Tap on Submit to proceed with conversion

EQ Online Forms
****000-Stocks

Withdrawal **Currency Conversion** Activations History

Action

Convert Amount Convert to Offset Debit Balance

Amount to be converted from

SGD

Amount to be converted to

USD

Value \ Process Date

25 Aug 2020

Remarks

Password

Terms and Conditions

Submit

HOW TO CUSTOMISE THE PLATFORM

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

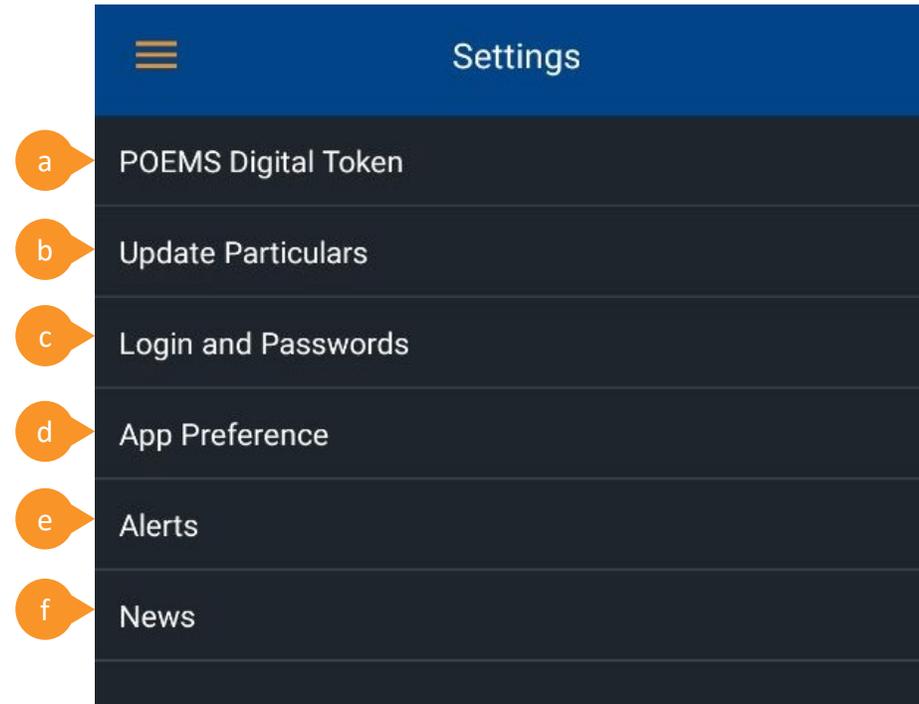
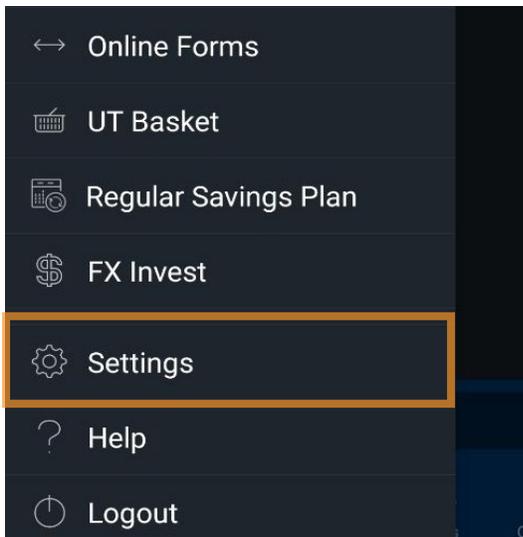
Settings

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

HOW TO CUSTOMISE THE PLATFORM

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

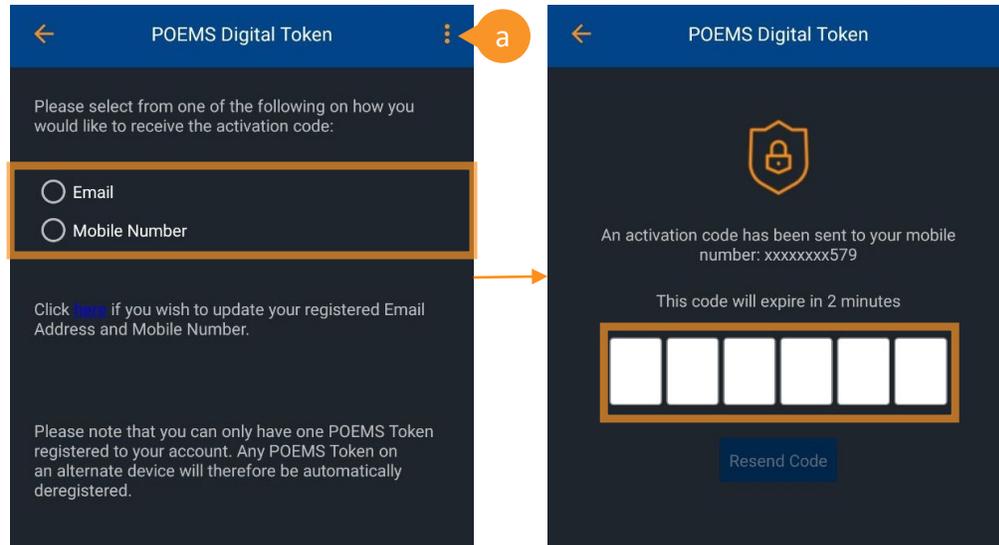
POEMS Digital Token

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

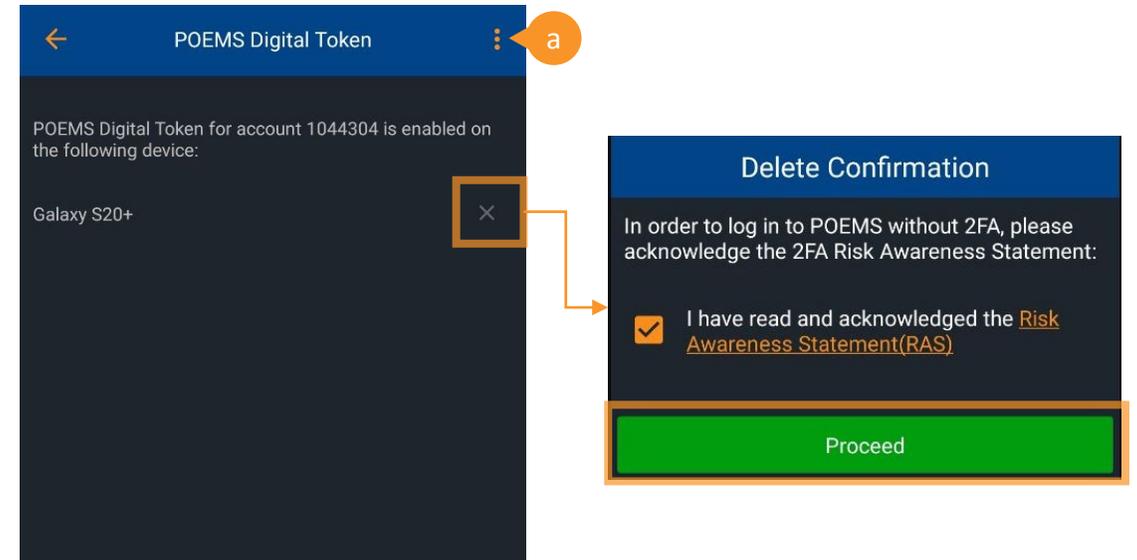


a. Click to browse POEMS Digital Token FAQs or Terms and Conditions

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



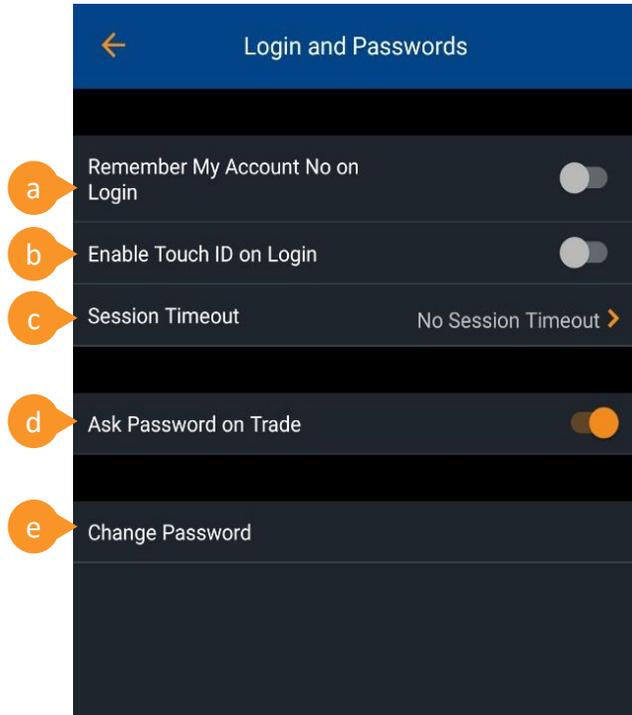
After tapping on X, a confirmation window will appear

HOW TO CUSTOMISE THE PLATFORM

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

Login and Password

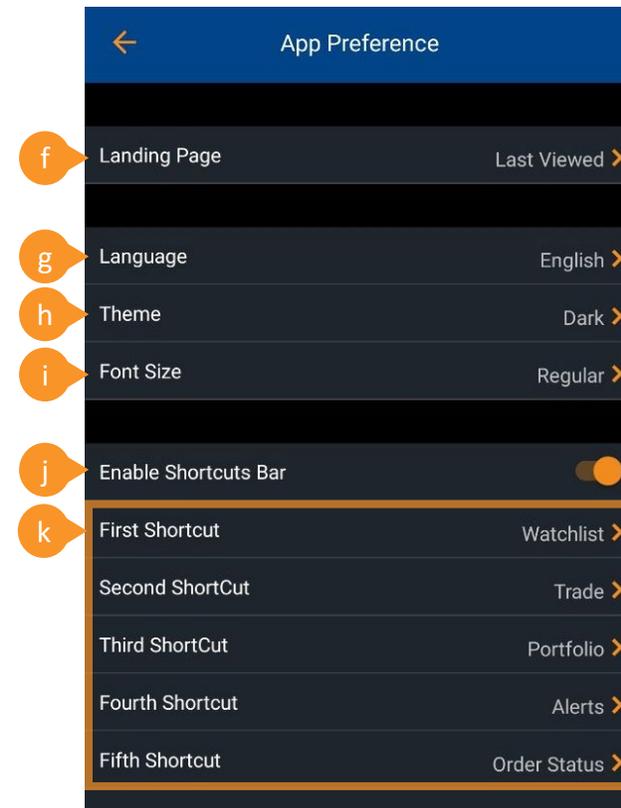
Set session time out period and change password



- 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

