# **Online Trading Platform User Guide**



www dhsvickers com

Disclaimer: The information contained in this document is intended only for use during the presentation and should not be disseminated or distributed to parties outside the presentation. DBS Vickers Securities accepts no liability whatsoever with respect to the use of this document or its contents.

Introduction
This guide aims to help you understand and operate your DBS Vickers Online Trading Account with visual illustrations. It will help to exemplify and address some common user experience issues. We hope that with this guide, you will be able to navigate the DBS Vickers Online Trading Platform with ease.



You will require a 2nd Factor Authentication (2FA) to log in to DBS Vickers online trading platform.

This is a One-Time PIN (OTP) which can be obtained via a secure device or SMS.



Update your mobile number via DBS Vickers Online Trading Platform under

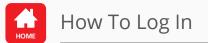
"My Profile"



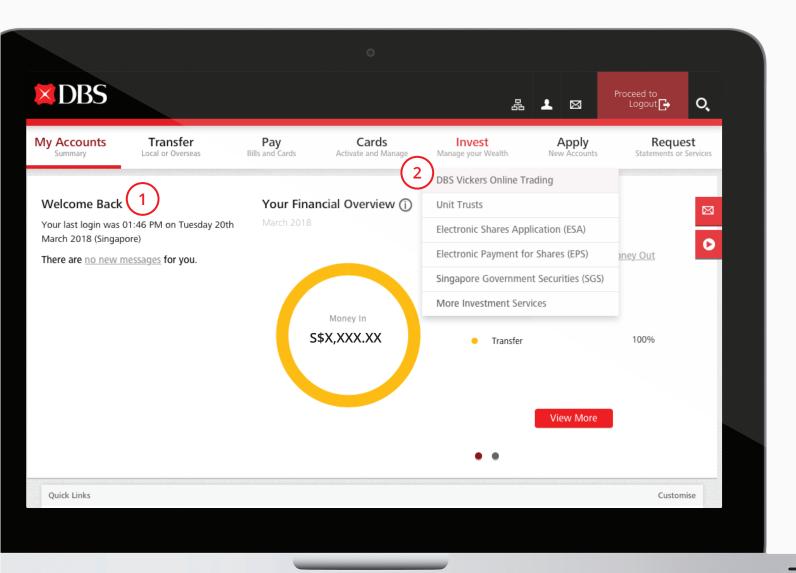
"Update Personal Details" page to receive the SMS OTP.

# Table of Content

How to Log In	Page 5 - Page 7	My Account	Page 34 - Page 42
Homepage —	Page 8 - Page 9	<ul><li>Balances</li><li>Holdings</li><li>Outstanding Contracts</li></ul>	
<ul><li>► Place Order</li><li>► Order Status</li></ul>	Page 10 - Page 21	<ul> <li>Custom Portfolio</li> <li>History</li> <li>eStatements</li> <li>Account Management</li> </ul>	
<ul> <li>Watchlist</li> <li>Advanced Market Data</li> <li>Transaction Screener</li> <li>Commission Calculator</li> </ul>		IPO —	Page 43
Commission Calculator		Resources —	Page 44
Markets —	Page 22 - Page 33	My Profile —————	Page 45 - Page 49
<ul> <li>News</li> <li>Insights</li> <li>Reports</li> <li>Stock Screener</li> <li>Stock Search</li> <li>Stock Comparer</li> <li>Charting</li> </ul>		<ul> <li>Change Password</li> <li>Update Personal Details</li> <li>Set Alerts</li> <li>Customise Site</li> <li>Enrol for eStatement</li> <li>2FA</li> </ul>	
<ul><li>Market Overview</li></ul>		Disclaimer —	Page 50



# Log in to your DBS/POSB iBanking account



- 1 Log in to your DBS/POSB iBanking account.
- 2 Click on the Invest tab > DBS Vickers Online Trading.

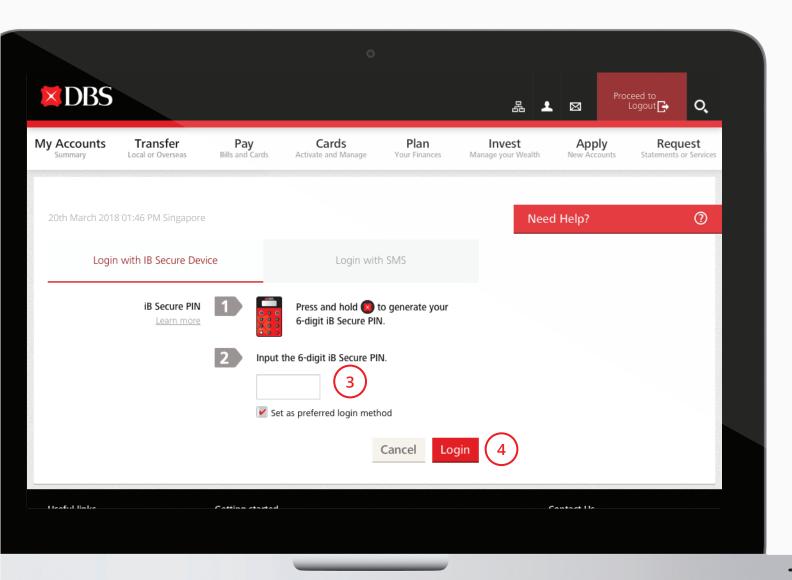








# Log in to your DBS/POSB iBanking account

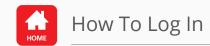


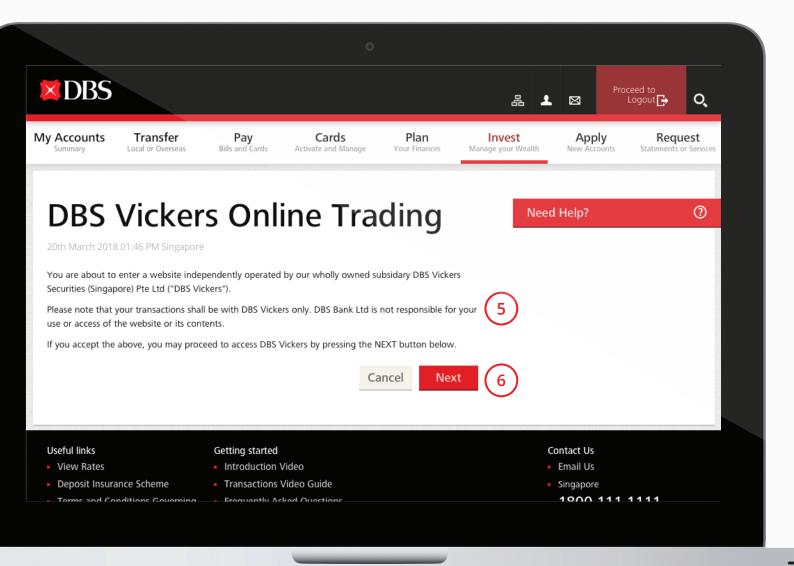
- **3** Generate a One-Time Pin (OTP) using either your 2FA Secure Device or via SMS.
- 4 Enter the One-Time PIN (OTP) and click Login











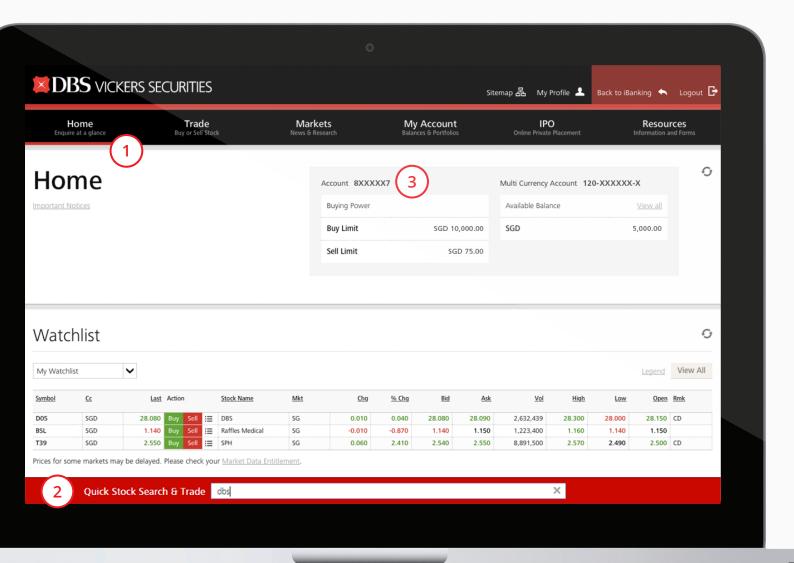
- 5 Read the terms and conditions stated.
- 6 Click Next to acknowledge the terms and conditions.







## Main Navigation of Site



- 1 Main navigation bar.
- 2 Smart Search quick access to stock information.

  (refer to next slide for illustration of Smart Search function)
- **3** View Your Buying Power and DBS Multi-Currency Account balances here.

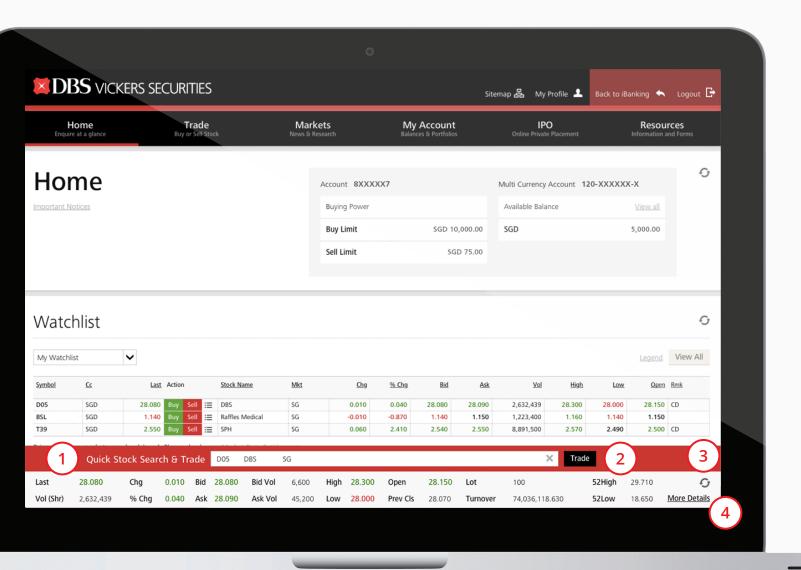








### Smart Search & Trade



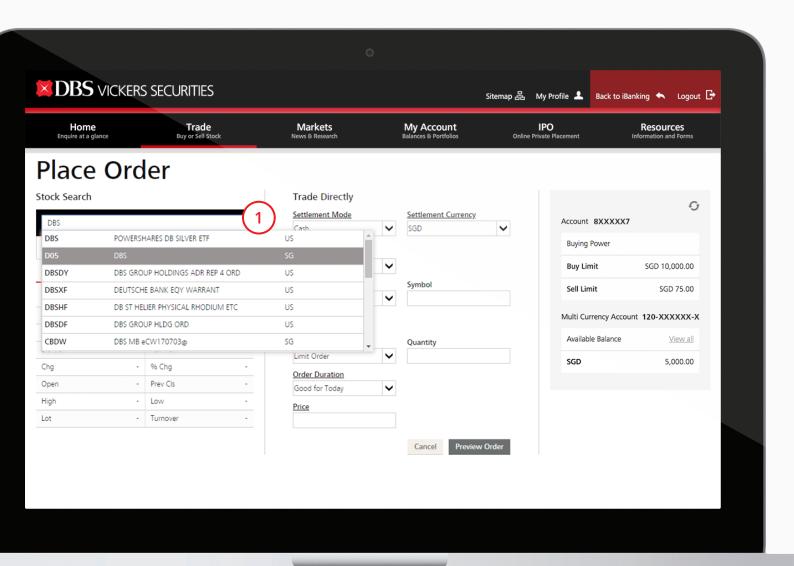
- 1 Enter stock symbol / name and click on the correct symbol to bring up current market information about share counter.
- **2** Click on Trade to place trade.
- Click on refresh symbol 5
- 4 Click on More Details to access overview details of the stock.







### Place Order



#### Trade > Place Order

1 Search by entering company name or stock code and click on the correct option that is found in the search result.

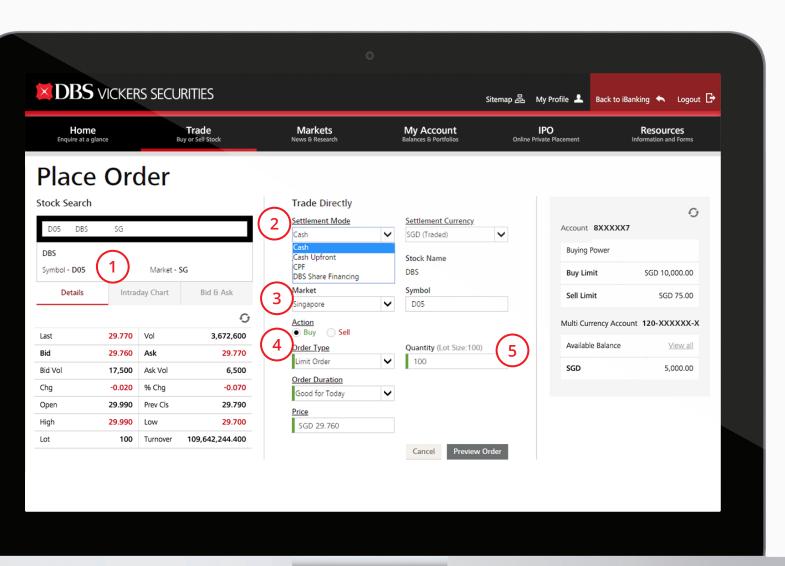








#### Place Order (Cash)



- 1 Chosen stock data will be populated. You can also view other data types by choosing other tabs.
- 2 Select your settlement mode in either Cash, Cash Upfront, CPF or SRS. If the chosen stock may be settled using SRS or CPFIS funds, the options will be available for selection under Settlement Mode. (Your trading account must be linked to your CPF/SRS account).
- **3** Select the markets that you wish to trade in. Markets offered include SG, US, CA, HK, UK, AU and IP.
- **4** Select your order type here. You may click on Order Type for more information.
- 5 Enter the quantity (in terms of unit share).

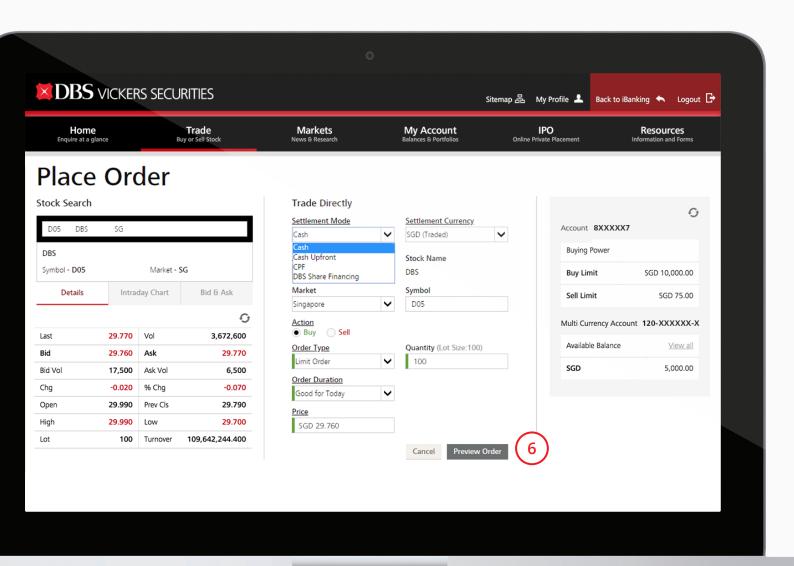








# Place Order (Cash)



6 Select Preview Order to proceed.

Note: For Cash buy order, please ensure that there are sufficient funds in the traded currency in your DBS Multi-Currency Account (MCA) on settlement date.

You can view your MCA balances from the right panel.

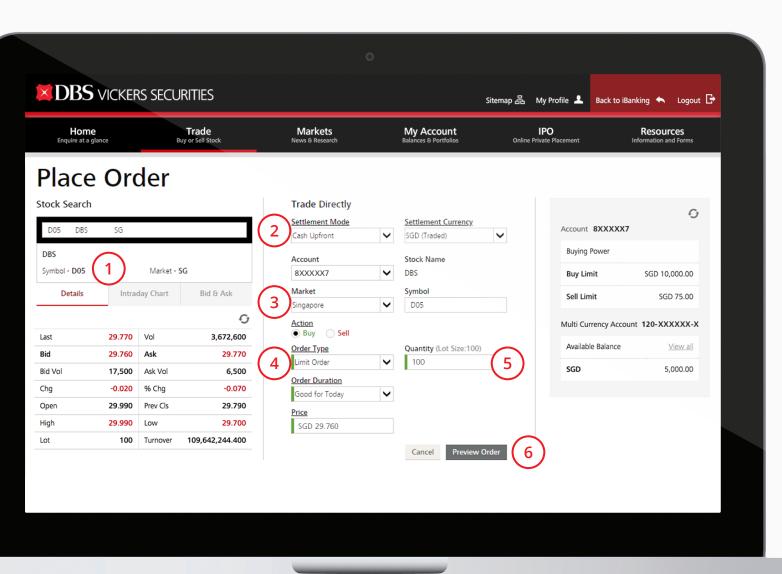








#### Place Order (Cash Upfront)



- 1 Chosen stock data will be populated. You can also view other data types by choosing other tabs.
- Select Cash Upfront as your settlement mode.
- Select the markets that you wish to trade in. Markets offered include SG, US, CA, HK, UK, AU and IP.
- Select your order type here. You may click on Order Type for more information.
- Enter the quantity (in terms of unit share).
- Select Preview Order to proceed.

Note: For Cash Upfront buy order, please ensure that there are sufficient funds (contract value of the trade plus charges) in the traded currency in your MCA **before placing a trade**. You can view your MCA balances from the right panel.

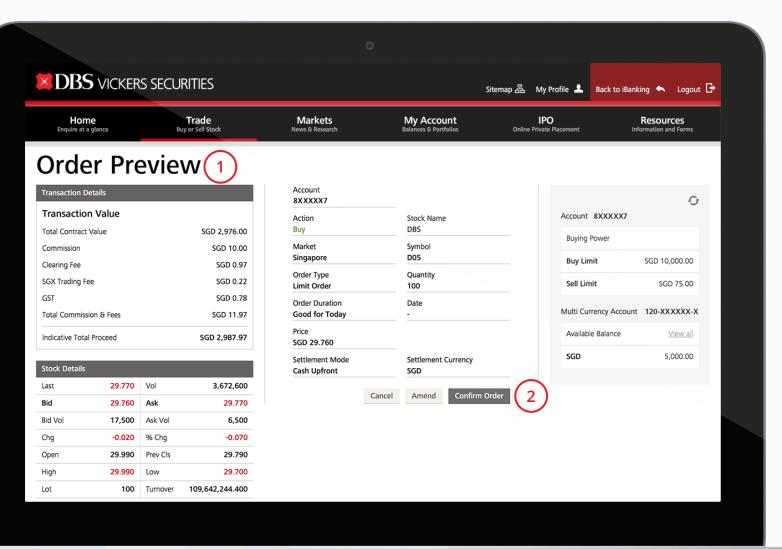








## Place Order (Order Preview)



- 1 Order Preview page displays a summary of the order details.
- 2 Check and verify the details of the order and click on Confirm Order to submit.

  You may also Amend or Cancel the order.



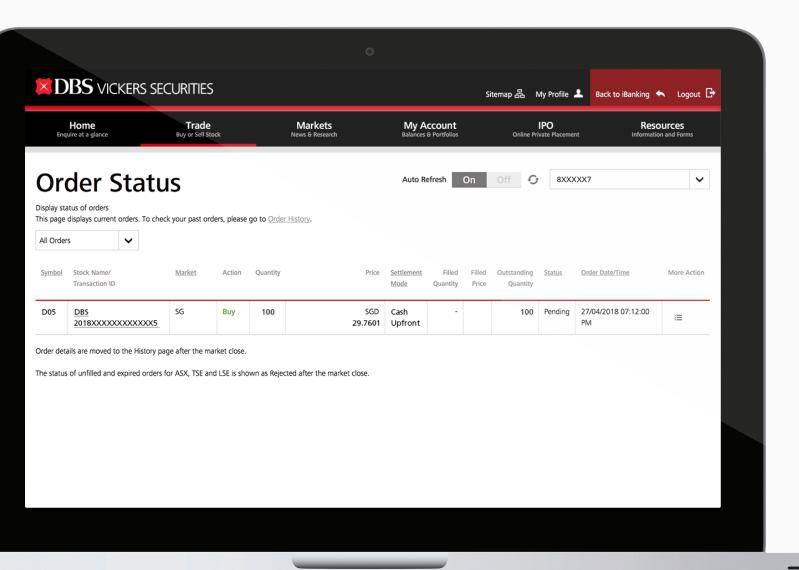












#### Trade > Order Status

Order Status displays working orders or any orders submitted for an incoming trading day.

Expired or fully executed orders will be shown in the 'History' section of 'My Account' tab the next day.

Good till date orders will continue to appear in the Order Status page until orders are either fully executed or expired.

Orders may be cancelled or amended in the 'More Action' section.







\$ LionGold

Falcon Energy

HSI29200MBePW180530@

CRZW

5FL

SGD

SGD

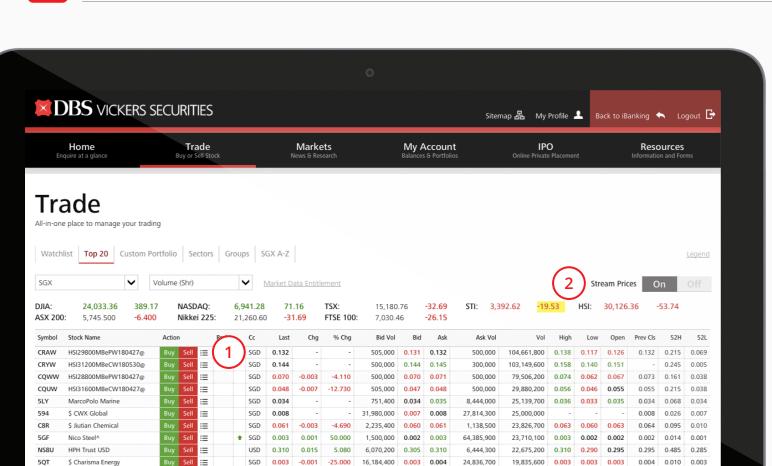
0.184

0.039

0.003

≔

Buy Sell



9,673,200

-0.890

8.330

100.000

172.400

0.001 0.002

0.183

0.039

0.184

0.040

390,523,300

10.000

716,800

913.300

12,406,900

12.080.000

10.437.200

0.002 0.001 0.001

0.041 0.037 0.037

0.001 0.003 0.001

0.036

0.330

0.128 0.030

#### Trade > Watchlist

All-in-one place to manage your trading.

Save and edit up to 5 Watchlists. Maximum of 30 stocks per list, or choose to view by top 20, custom portfolio, sector, groups or SG stocks listing A-Z.

Customisation of fields for variables to monitor stock performance.

- 1 Move cursor to access smart functions or click on Buy Sell to place a trade. ■
- 2 Toggle for streaming.

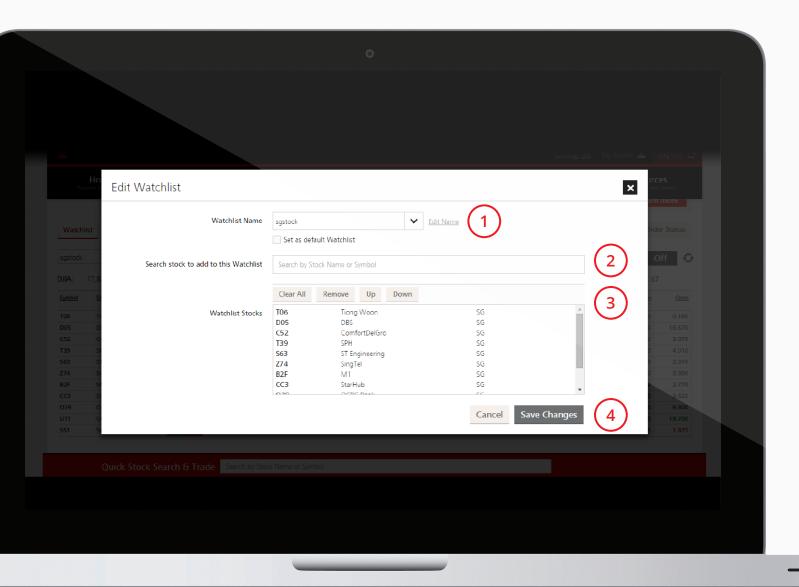








# Watchlist (Editing)

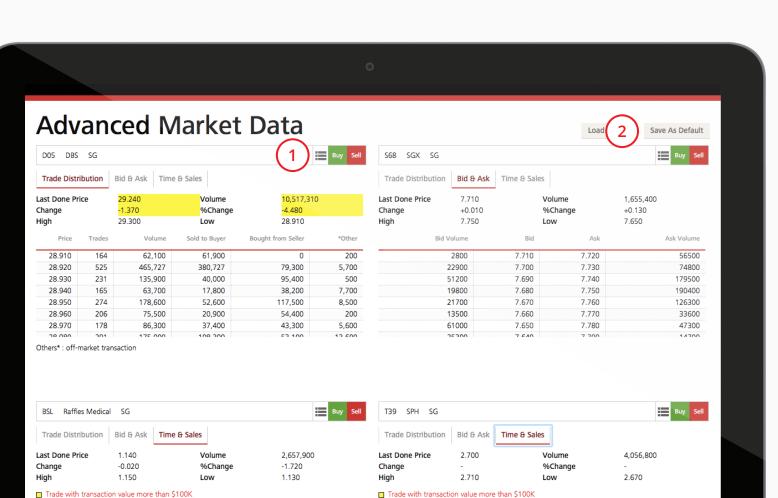


- 1 Select Watchlist to edit, customise watchlist name.
- **2** Search for stock counters by company name or stock symbol.
- 3 Add or remove search results to/from the list.
- **4** Click on Save Changes to save Watchlist.









Trade Size

#### Trade > Advanced Market Data

Monitor four stocks at the same time on the same page. Allows dynamic data feeds and viewing of Trade Distribution, Bid & Ask, as well as Time & Sales data feeds.

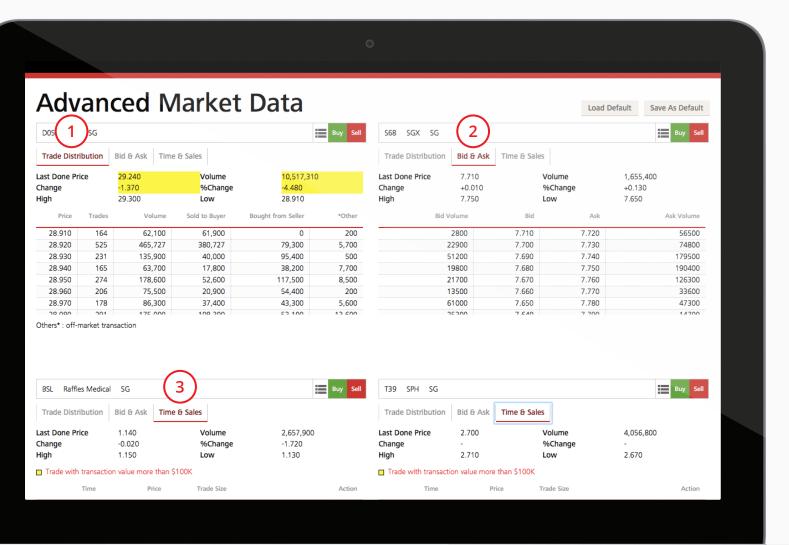
- 1 Access smart functions and place trades. Buy Sell
- 2 Click on Save As Default to save template as a default template for easy future access.











1 Advanced Market Data > Trade Distribution

Trade Distribution shows the current trading day's trade distribution. It displays a stock's transaction and is sorted by transacted price.

\*Other section refers to a trade that is not executed at the exchange floor and could be in the form of a married trade or Equity Swap between corporations.

2 Advanced Market Data > Bid & Ask

Bid & Ask displays the next price queue after the current Bid & Ask price.

3 Advanced Market Data >Time & Sales

Time & Sales displays the transaction's execution point over the spread of the trade day.

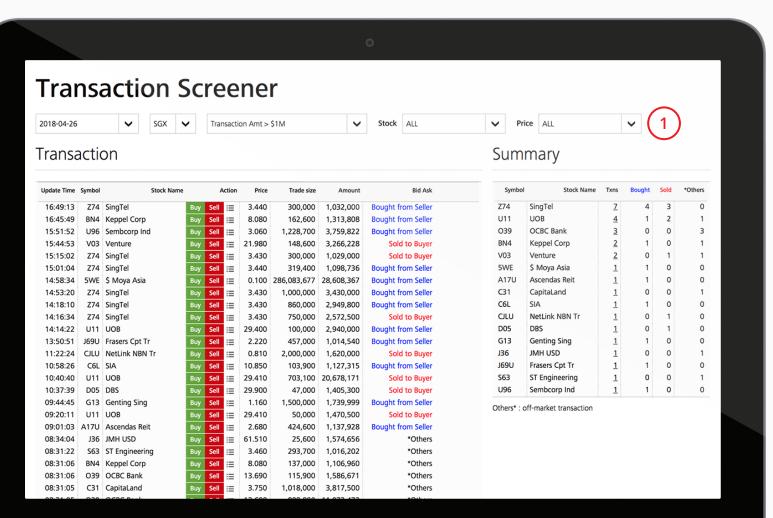












#### Trade > Transaction Screener

1 Track and locate trade information of certain sizes. You may filter transactions that fall within the specified range in terms of contract value or price.

Note: Access to "Transaction Screener" for Singapore market is at DBS Vickers' absolute discretion taking into account your monthly transactions.

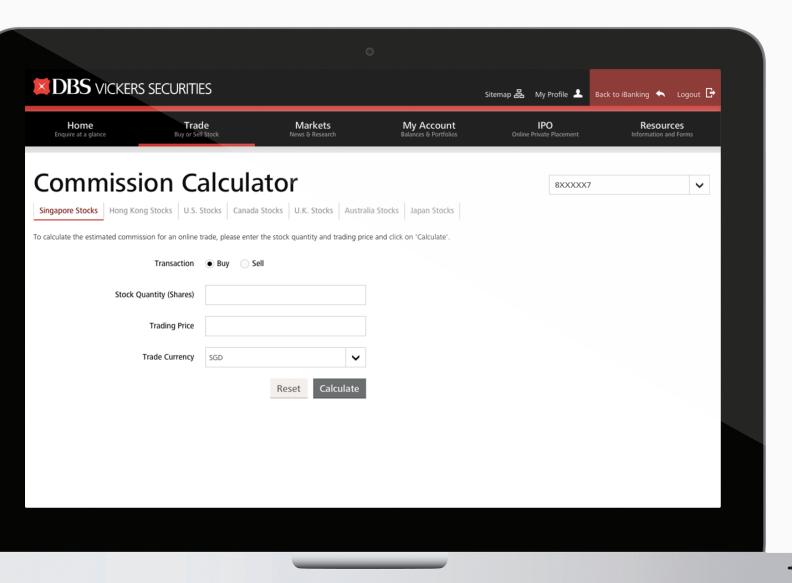
PRE'











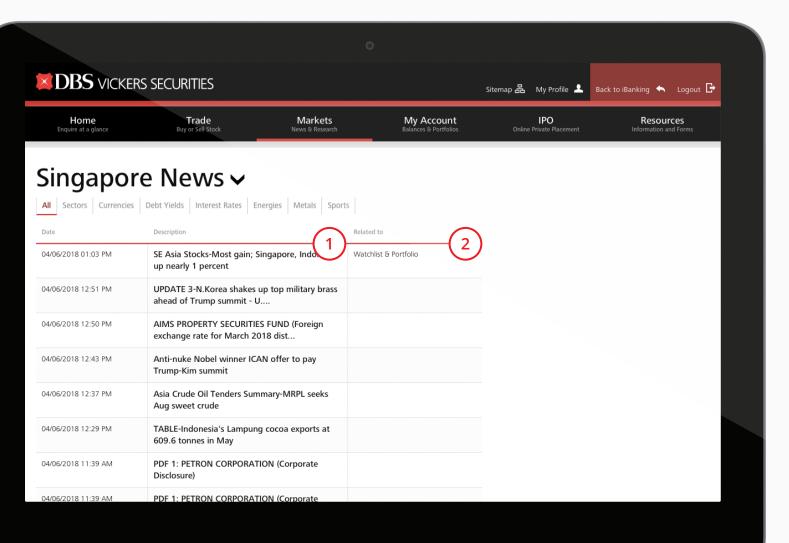
# Trade > Commission Calculator

Calculates the estimated brokerage commission charges for your trades.









#### Markets > News

Access news feed across the markets.

- Click on headlines to access the content of the news.
- 2 News that are directly/ indirectly related to stocks in your Watchlist/Custom Portfolio will be indicated next to the news.

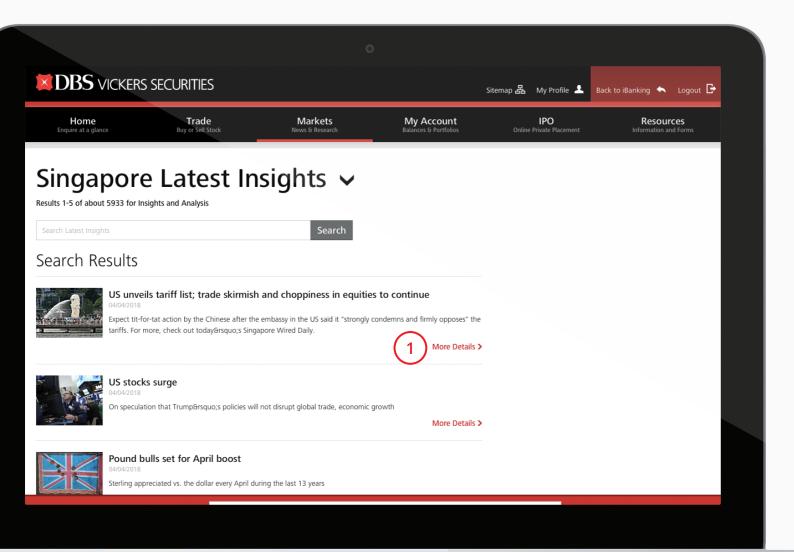












## Markets > Insights

Insights on economic and strategic views straight from DBS Group Research.

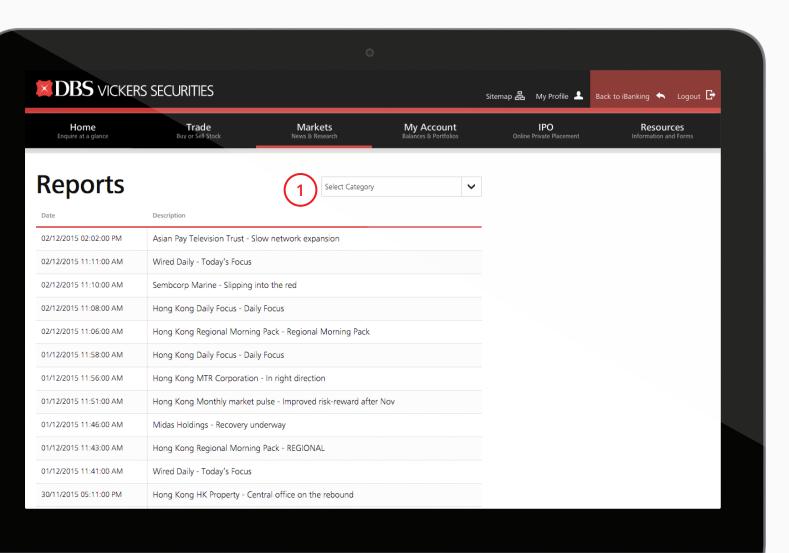
1 Click on More Details > to access the full report.







# Reports



## Markets > Reports

The Reports tab gives you access to recommendation reports from DBS Group Research.

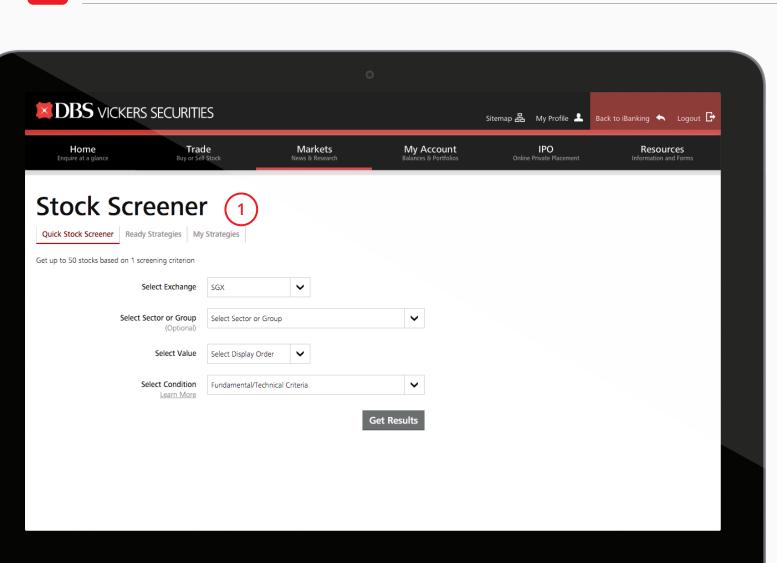
1 Select your area of focus.











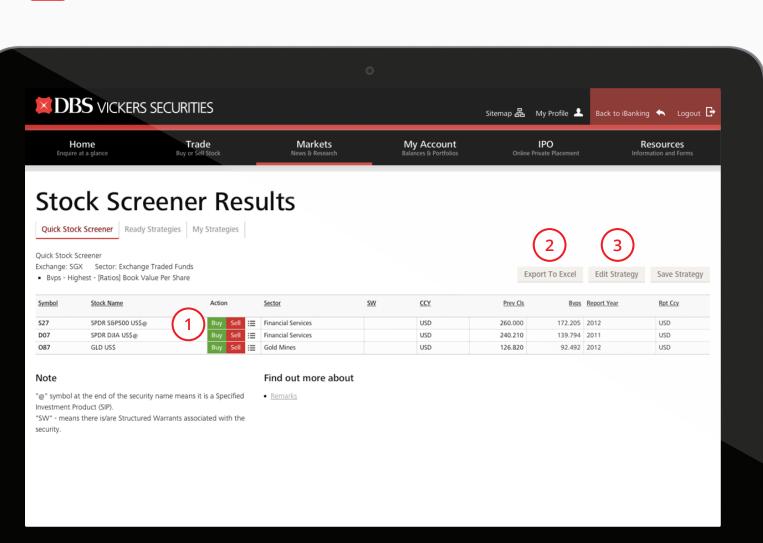
#### Markets > Stock Screener

1 Filter and pick stocks based on specified criteria. Choose from sets of ready strategies or create your own strategies for stock picking.



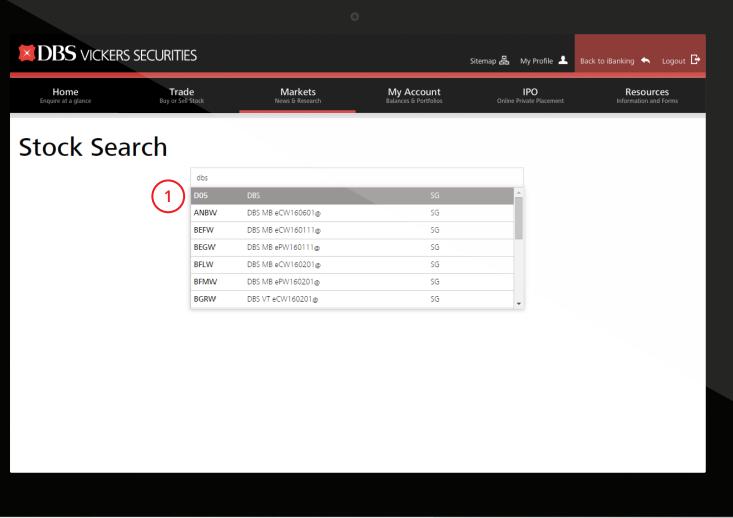






- **2** Click on Export To Excel to export your strategies.
- **3** Edit your strategies by clicking on Edit Strategy . You can save up to 5 strategies.





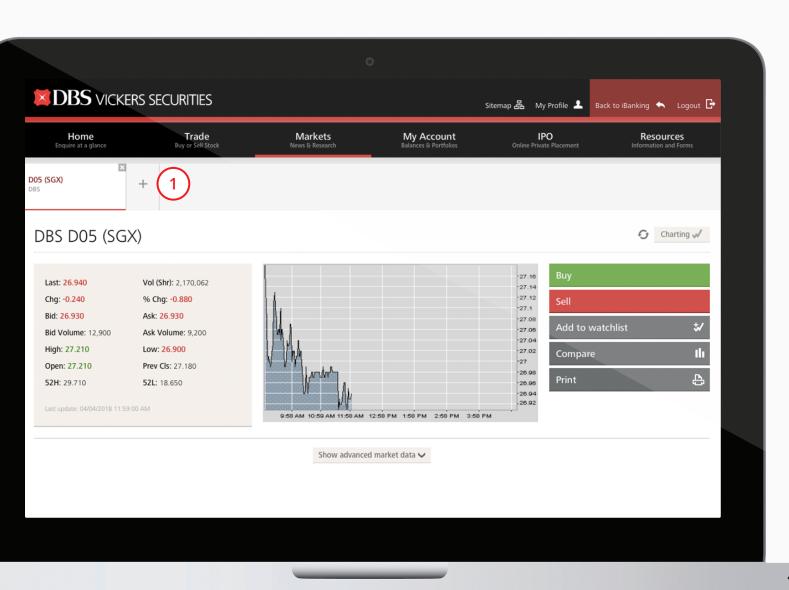
## Markets > Stock Search

**1** Enter Stock Name or Symbol to display the fundamental data of the company.









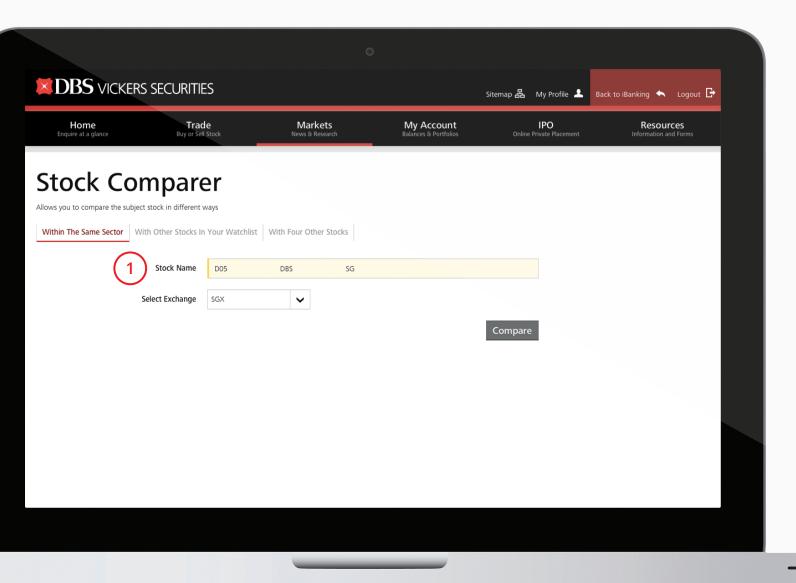
1 Click + to add multiple stocks for quick toggling.











# Markets > Stock Comparer

1 Compare specified stocks against each other's fundamental/technical data.

Able to compare stocks in the same sector, watchlist or 4 other counters of your choice.

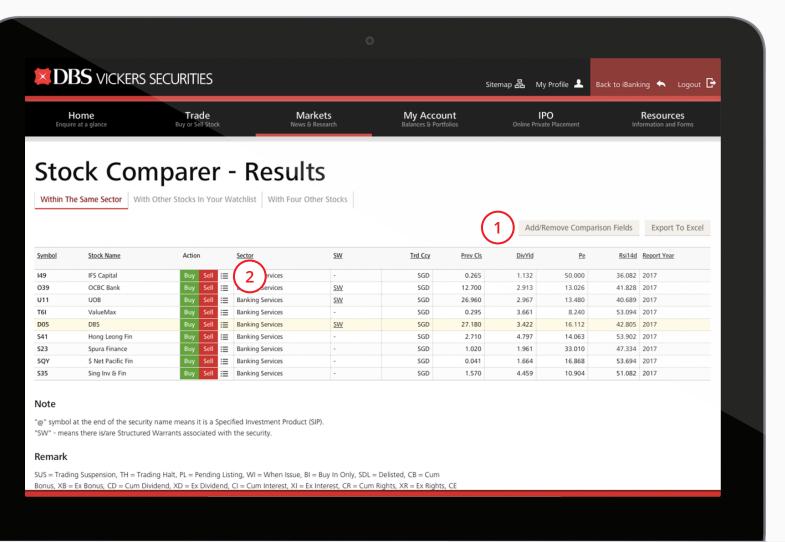








## Stock Comparer (Continue)



- 1 Gives you the flexibility to

  Add/Remove Comparison Fields
  by selecting from a list of
  fundamental/technical criteria.
- 2 Move cursor to access smart functions 
  ☐ or click on
  Buy Sell place a trade.







## Markets > Charting

- 1 Able to display daily, weekly or monthly charts for the past 5 years.
- 2 View chart options for customisation such as colour, chart styles etc.
- Tools to add indicators / draw lines on chart. Edit the template to add up to 5 indicators. Choose between Line, Bar or Candlestick chart styles.
- **4** To zoom into a particular period, click and hold along that area of the chart.

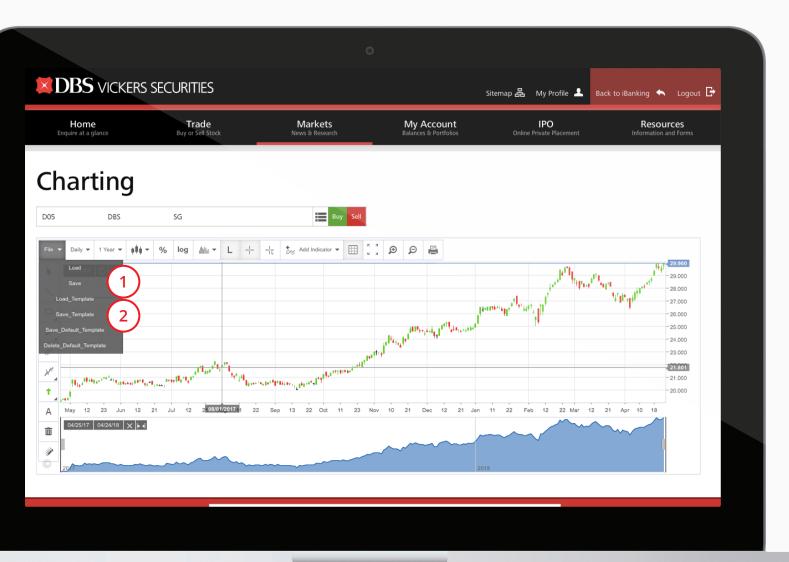








# Charting (Continue)

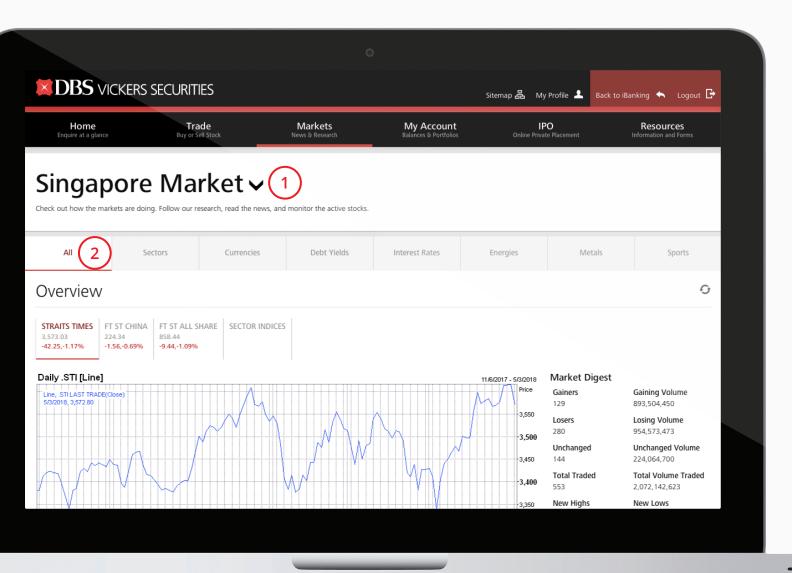


- 1 Save Chart Save any indicators / settings / drawings applied to the chart.
  Limited to 5 charts.
- 2 Save Template Save only the indicator settings applied to the chart. Limited to 5 templates.









#### Markets > Market Overview

View all the latest insights, research reports and stock recommendations from DBS Group Research across different markets at a glance.

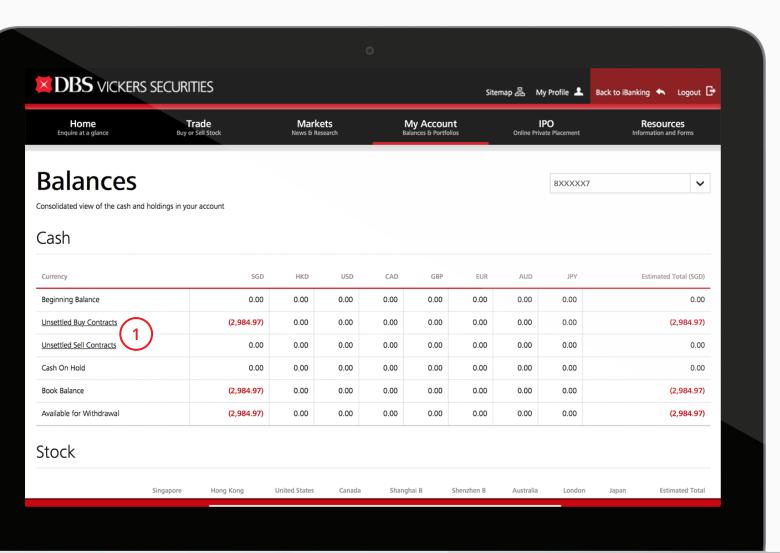
- 1 Select the market from the drop down list.
- **2** Click on the blocks to access across different categories.







### Balances



## My Account > Balances

Balances page displays a current view of fund balances and holdings of an account.

1 You may view your unsettled Buy or Sell trades here.

Note: Once your order has been filled, the amount will be debited from or credited to your MCA on settlement date. You can view your MCA balances either from the Home tab or iBanking.

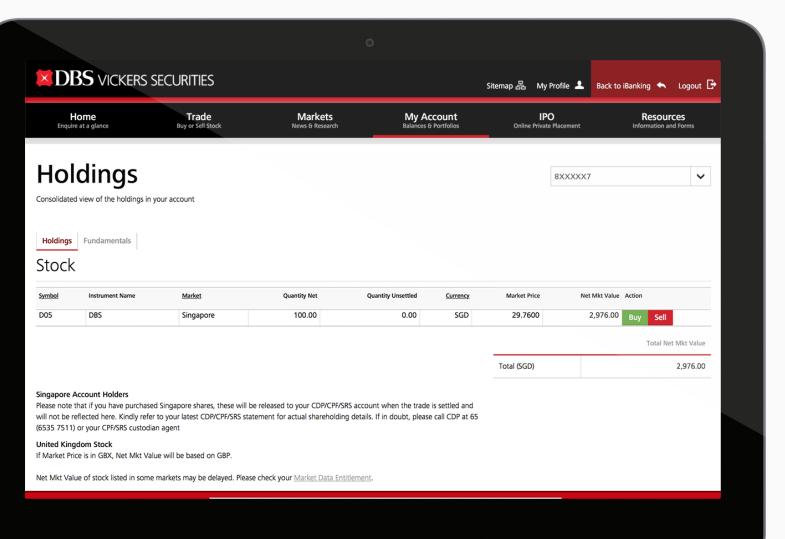
Fixed income (foreign market) and Unit Trust are no longer available online.











## My Account > Holdings

Display holdings of all markets: SG, HK, US, CA, UK, AU and JP

SG holdings will only be shown during pre-settled status. Once trade has been settled, SG holdings will disappear as they will be held in your Central Depository (CDP) account.

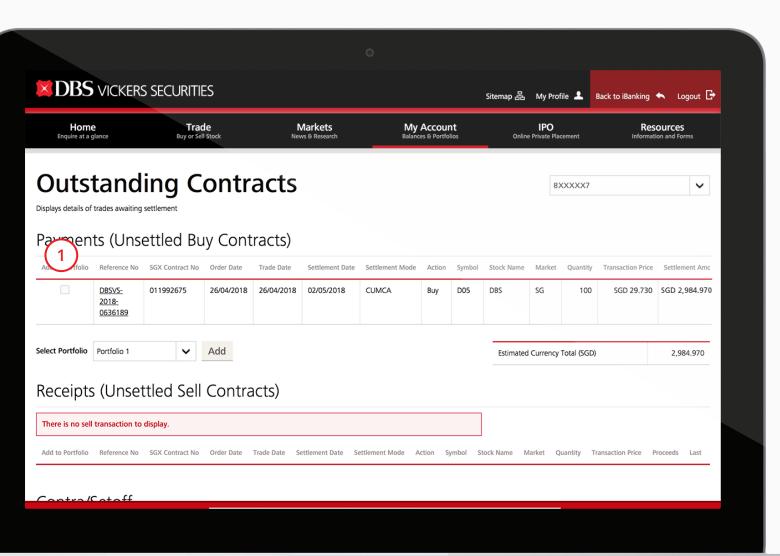








## **Outstanding Contracts**



# My Account > Outstanding Contracts

Display outstanding contracts for all markets.

Once your trade has been filled, it will be reflected under Outstanding Contracts until the trade has been settled.

Note: The amount will be debited from or credited to your MCA on settlement date. You can view your MCA balances either from the Home tab or iBanking.

1 Add a transaction to Custom Portfolio by checking the box and selecting the portfolio to add to.

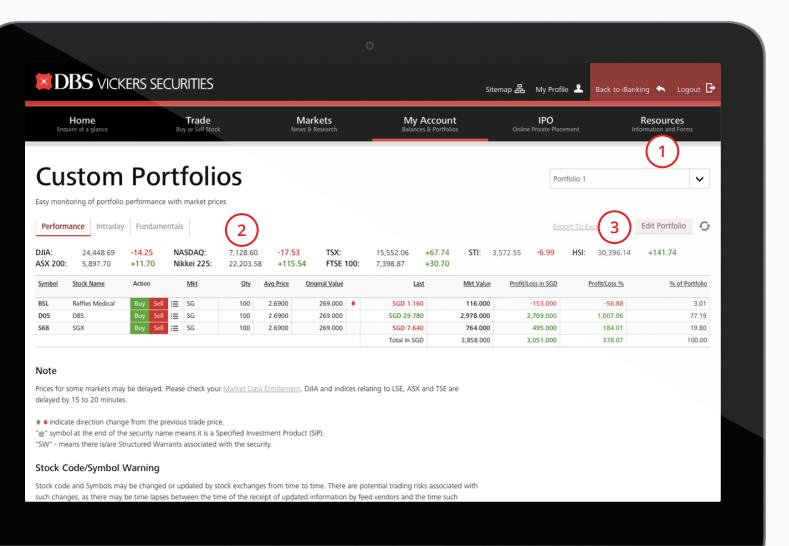








#### Custom Portfolio



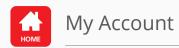
### My Account > Custom Portfolio

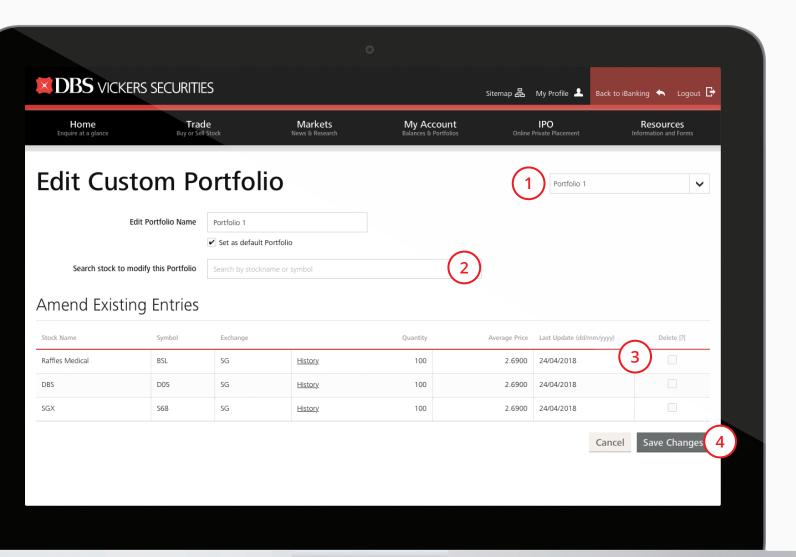
- 1 Create up to 5 portfolios to monitor stock performance.
- 2 View portfolio from various dimensions, such as intra-day market data, performance or fundamental data of the company.
- 3 Click on Edit Portfolio to edit. (refer to next slide for editing of portfolio)









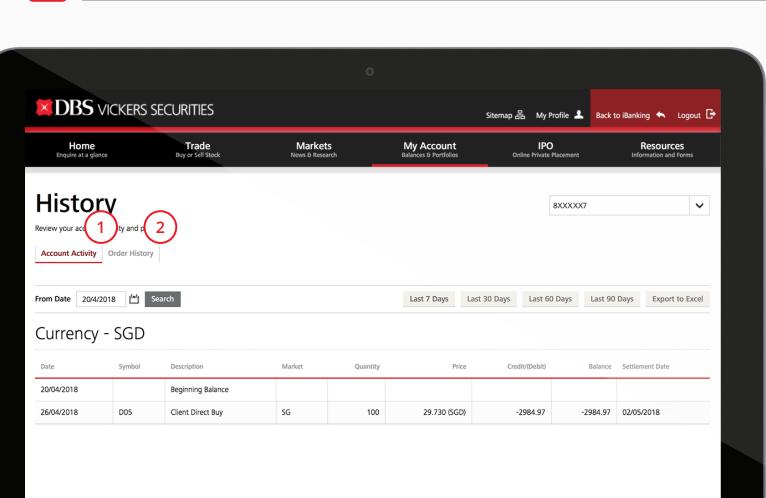


- 1 Choose the portfolio that you wish to edit.
- Add a new stock by entering the stock name/ symbol. Include details such as the price done and quantity during the addition.
- **3** Check on the box to delete an entry.
- 4 Click Save Changes for the edits to take effect.









### My Account > History

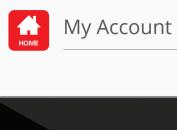
- 1 View up to the last 12 months of your Account Activity by specifying the period.
  - (Useful for tracking dividend payments)
- 2 View past orders, up to the last 12 months, from the Order History tab.

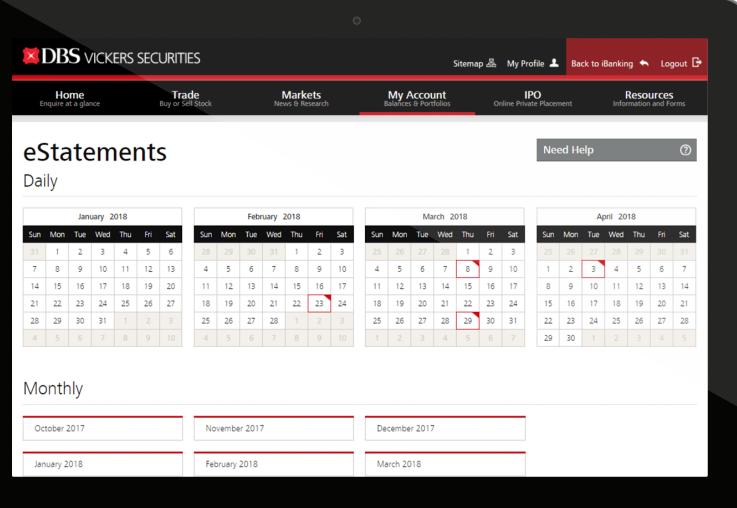
(E.g. executed orders, expired orders, etc)











### My Account > eStatements

Through eStatements, you may view your daily statements for the past 90 days as well as your monthly statements for the past 6 months.

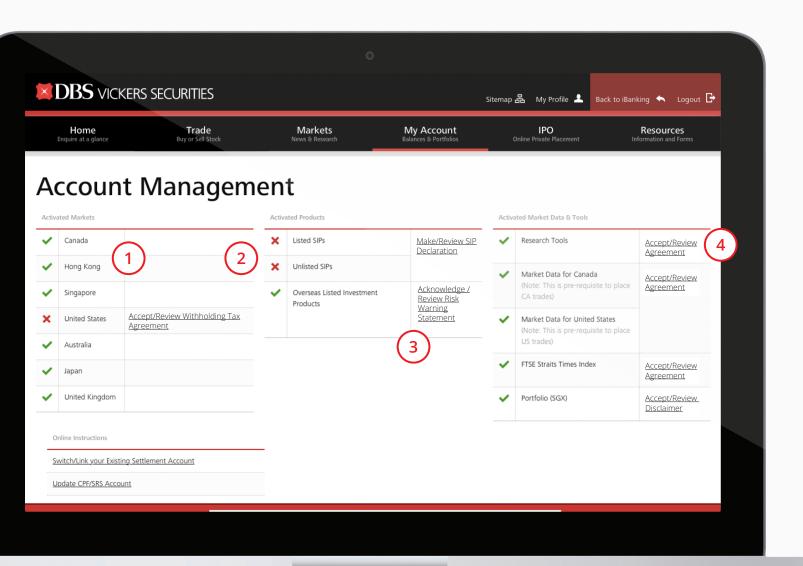
PRE\







### **Account Management**



## My Account Account Management

- Markets that are available for trading.
- 2 Declaration in Specified Investment Products (SIP) enables you to trade in more complex financial products.
- 3 Risk warning statement highlights the key risks involved when trading in Overseas Listed Investment Products. Acknowledge this section to enable you to trade in foreign markets.
- **4** Review and accept the agreements in order to use the market data and tools in the platform.

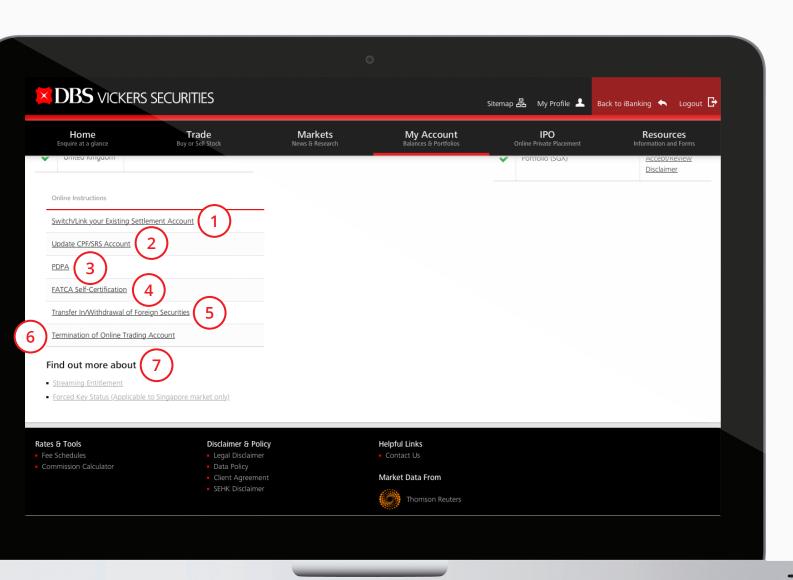








#### Online Instructions



## My Account Account Management

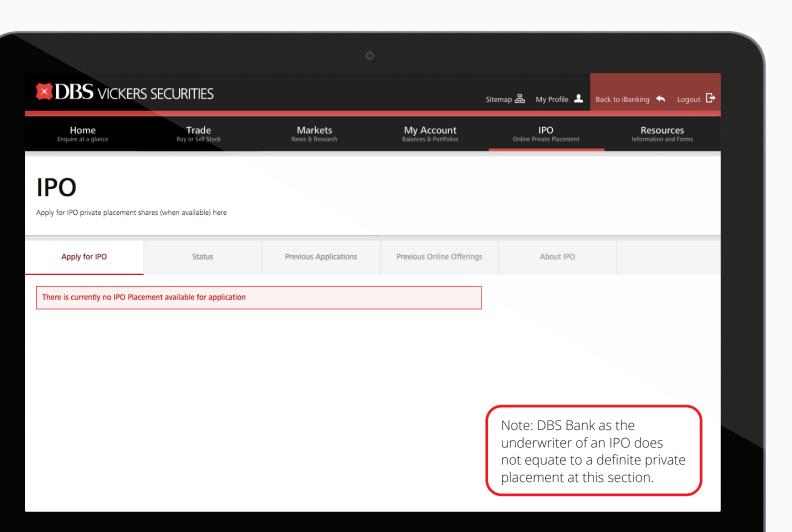
- **1** Switch and update your MCA for settlement.
- 2 Link your CPF / SRS account to your DBS Vickers online trading account.
- 3 Update your PDPA status with DBS Vickers.
- 4 Update your FATCA Self-Certification.
- **5** Perform transfer or withdrawal of foreign securities.
- **6** Terminate your trading account.
- 7 Check your Market Data entitlement.











#### IPO > Overview

Application of private placement for DBS Vickers online customers.

Advance announcements will be made to notify the period that an account holder may log in and submit their interest for subscription of a Private Placement.

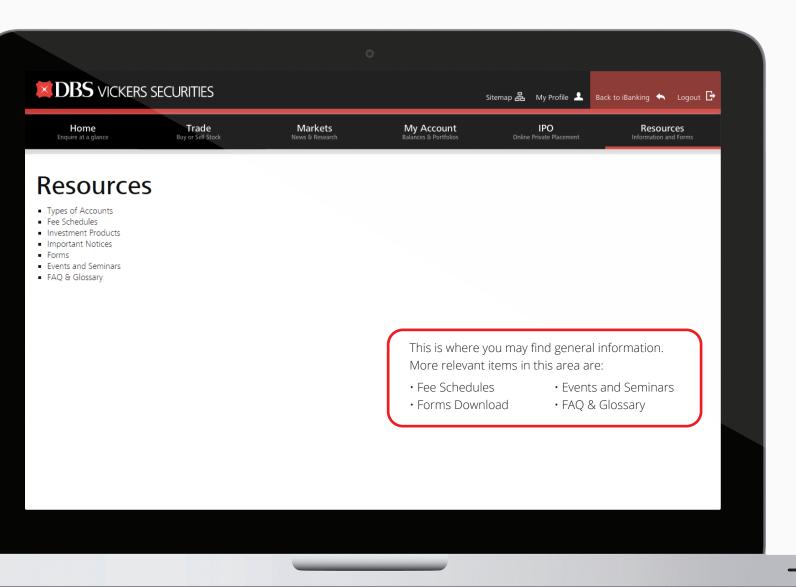
#### Options under IPO:

- ► Apply for IPO
- Status
- Previous Applications
- ► Previous Online Offerings
- ► Application Terms & Conditions
- General Terms & Conditions
- ► FAQ
- ► IPO Overview









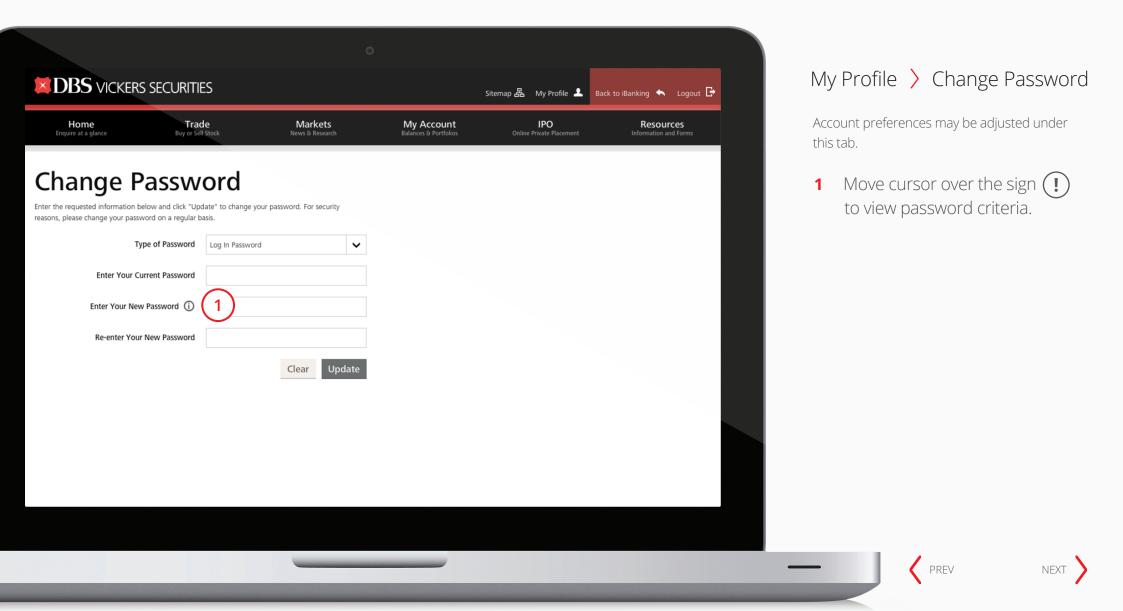
#### Resources > Overview

Options under Resources:

- ► Types of Accounts
- ► Fee Schedules
- ► Investment Products
- ► Important Notices
- ► Forms
- ► Events and Seminars
- ► FAQ & Glossary
- ► Resources Overview

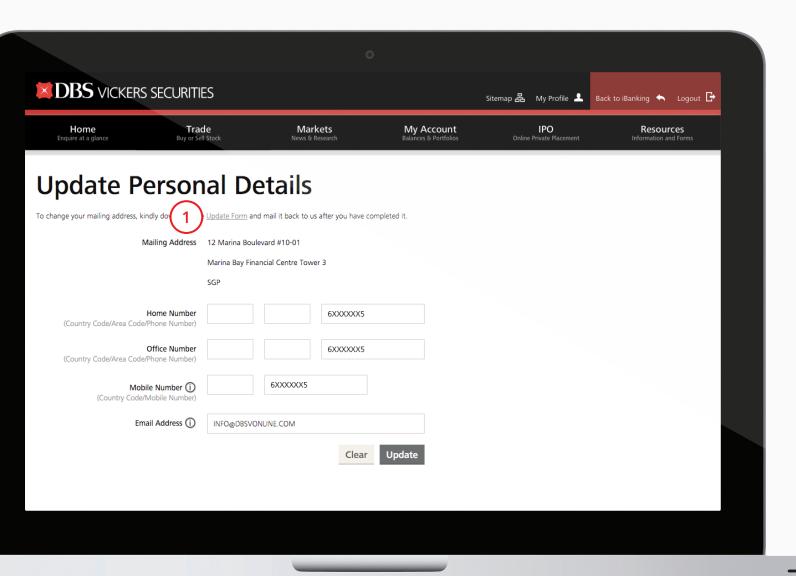








## **Update Personal Details**



## My Profile > Update Personal Details

To update your particulars, you will need to log in using your 2FA secure device.

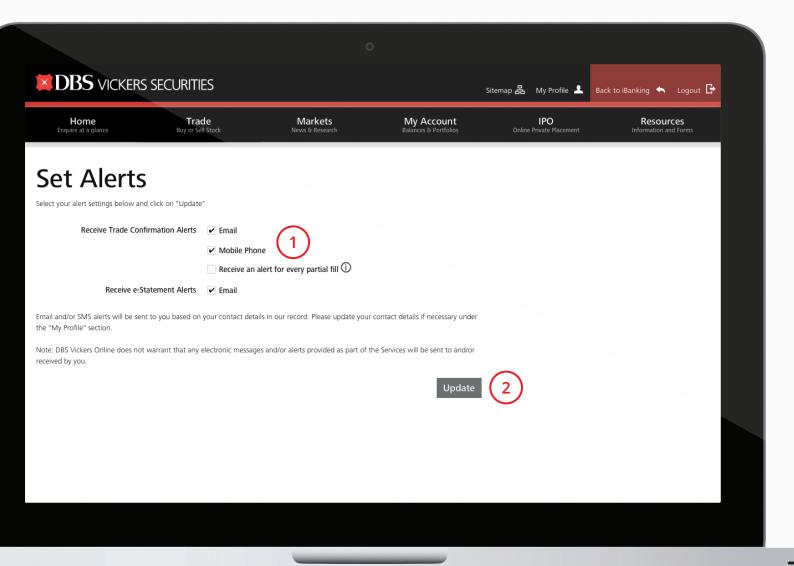
1 For update of address, click on <u>Update Form</u>, print out the forms and return via post.











## My Profile > Set Alerts

- Check the box to indicate the channel(s) you wish to receive alerts for trade notification.
- Click on Update to confirm.

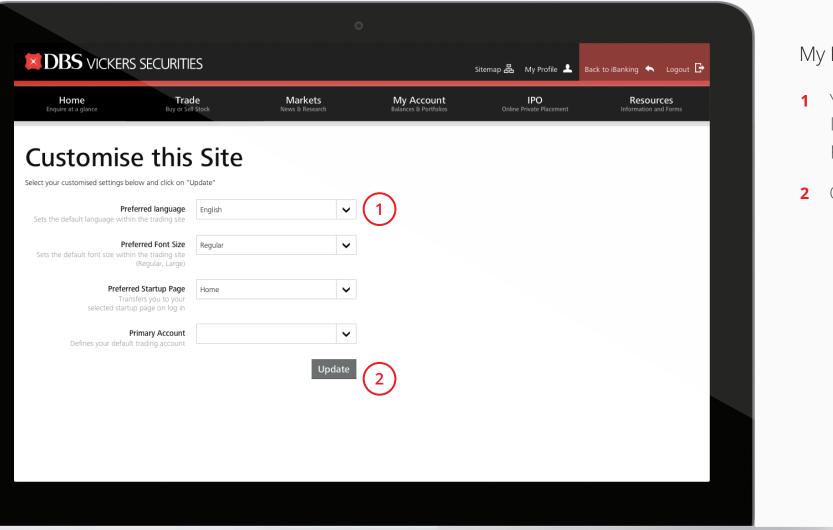












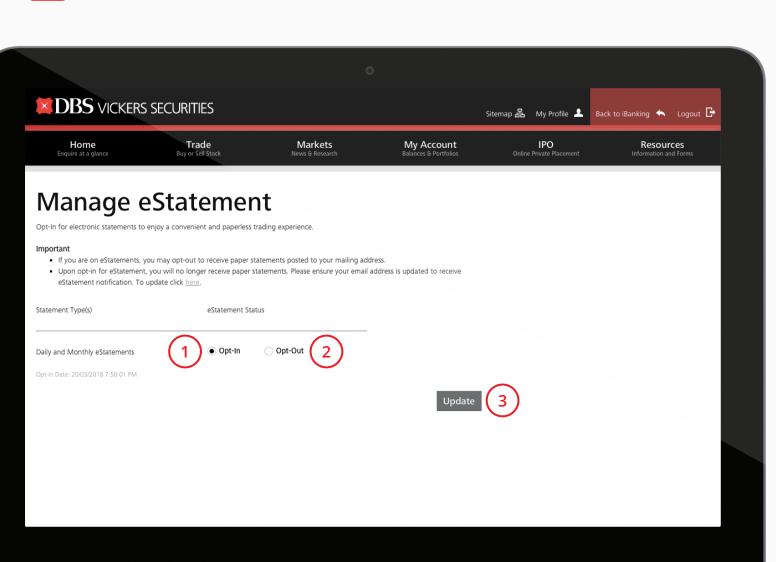
## My Profile > Customise Site

- You may choose your preferred language, font size, start up page and primary account.
- Click on Update to confirm.









# My Profile > Manage eStatement

- 1 Choose opt-In for electronic statements to enjoy a convenient and paperless trading experience.
- 2 Choose opt-out to receive paper statements posted to your mailing address.
- **3** Click on Update to confirm.







'This information is published for general circulation only and does not have regard to the specific investment objectives, financial situation and the particular needs of any specific person. Investors should seek advice from a financial adviser regarding the suitability of the investment product, taking into account the specific investment objectives, financial situation or particular needs of each person in receipt of this document before making a commitment to purchase the investment product. In the event that the investor chooses not to do so, he/ she should consider carefully whether the product is suitable for him / her.

DBS Vickers Securities (Singapore) Pte Ltd accepts no liability whatsoever for any loss suffered howsoever caused arising from your participation in this programme."

