PHILLIP SECURITIES PTE LTD

POEMS ChartWhiz
Stock Screener

User Guide
Introduction
Always not knowing what is the best time to enter and exit the market? Can't decide on which shares to buy? Trouble no more. ChartWhiz, powered by Recognia's proprietary algorithm, will show you all the significant trading signals at one glance, allowing you to be the first to grab hold of all profitable investment opportunities.

ChartWhiz provides easy to use investment analysis tools which cater to the needs of novice as well as experienced investors. With ChartWhiz, all investors are be able to shortlist profitable investments opportunities in the shortest time possible with minimal effort, thus maximizing the number of profitable trades done in the same time frame. ChartWhiz automatic stock monitoring will alert you on any significant market movements, telling you the right time to enter and exit the markets.

Content of ChartWhiz Guide
This user guide provides you the simple steps to navigate through ChartWhiz.

With this user guide, you will be able to learn the methods to
• spot profitable investment opportunities using ChartWhiz
• make informed investment decisions by choosing the most appropriate time to enter and exit the market
• monitor the basket of investments that you have

Getting Started
The following are the steps for you to access to ChartWhiz:
(1) Login into your POEMS account.
(2) Go to Stocks.
(3a) Go to Research => ChartWhiz

OR

(3b) Go to the counters name that you are interested in in Price, LP1 or LP2. After which, right click on the counter’s name, choose ChartWhiz.
Overview - Shortlisting Profitable Stocks

On the Overview page, you will be able to see the featured BULLISH and BEARISH events. The counters are classified into the bullish or bearish category based on technical indicators of charts. The technical analysis is done by ChartWhiz automatically on all the counters in the various stock exchanges. Upon the completion of the daily analysis on all the counters, ChartWhiz will pick up the most bullish and bearish counters to be displayed on the Overview page. With this performance summary, you will be able to identify the most bullish or bearish counters of the various markets at one glance, providing you suggestions on counters you should invest in.

To view details of the featured counters, simply place your mouse cursor above the company’s name. A pop-up box will then appear, displaying useful stock information such as the date of Technical Event spotted, bullish or bearish counter, target price range, transacted volume as well as the duration of the identified technical pattern.

You can also select the Most Viewed and Top User Rated tabs in these featured sections. These two tabs will show you the counters of interest of other investors. From this, you can have an idea of what are the popular counters in the different exchanges.
View Stocks’ Details & Determine the Date of Entry and Exit

Before you confirm on the execution of any trade, you can access ChartWhiz for a prediction of what returns your investments will bring you. The estimated future prices of your investments are calculated based on technical analysis done automatically by ChartWhiz.

Technical Event Lookup

Technical Event Lookup brings you to a whole list of Technical Events spotted by ChartWhiz for your counter of interest. You can use the unique ticker symbol for the respective counters to look up for recent Technical Events. To get the ticker symbol of any counter, you can search for it with the SYMBOL LOOKUP button. Key in the ticker symbol into the Technical Event Lookup and click on the Search button. This will then bring you to the technical analysis page of that counter. A list of technical indicators spotted will be shown to you.

At the stock’s main technical analysis page, you can see the summary of all the technical analysis done for that particular counter. From this page, you can further look into the different categories of analysis by choosing the time period of analysis. The three different time period for selection are as follows:

- Short-Term – outlook for the following 2 to 6 weeks
- Intermediate-Term – outlook for the following 6 weeks to 9 months
- Long-Term – outlook for the following 9 months and more

The stock chart shows the price movement of the stock over the years. In the stock chart, there are also green (i.e. bullish) and red (i.e. bearish) indicators telling the date of occurrence of the Technical Events. These Technical Events are derived from the different technical analysis instruments. With these indicators on the chart, you will be able to know if the past price movements are bullish or bearish. The majority indicators colours will serve as a guide to future price movements of the stocks. From there, you will then be able to predict the future price movements, thus maximizing your investment profits.
More details of the technical indicators are listed below the price chart, so as to provide clients a more in-depth analysis of the performance of the stock at different time periods. Certain technical indicators spotted will come with a predicted high/low target price range. Investors may make use of this information to plan their enter and exit prices, thus maximizing their investment returns. Only technical indicators that are still applicable to the current performance of that stock will be shown in ChartWhiz. To view both active and non-active technical events, click on HISTORICAL LOOKUP under the Highlights >> Technical Events section on the right of the page. This will bring you to the Search page where you can retrieve all the spotted Technical Events for the counter.

Under the HIGHLIGHTS section on the right, you will be able to find the support and resistance price. These prices will assist you in making your investment decisions. Stop prices for long and short positions are also provided to help you to maximize your profits.
Find Investment Opportunities Using Technical Event Screener

Technical Event Screener helps you to find stocks from the respective exchanges that satisfy certain criteria. With Technical Event Screener, you are able to find profitable investment opportunities and make informed investment decisions.

Simply click on the Technical Event Screener button at the top of the ChartWhiz page to start off with. After which, you can search for stocks that satisfy certain predefined criteria such as “Highly Traded Bullish Stocks”, “Highly Traded Bearish Stocks” etc. The criteria for these searches are preset. If you wish to set your own search criteria, simply click on the “Advanced” tab at the top right hand corner of the page. You can then customized your own search criteria. Click on the Search button after defining your criteria to find stocks that matches your criteria.
Investment Opportunities Alert

After searching for the stocks using the Technical Event Screener, you can set the alerts for the preset/customized criteria. An email alert will be sent to you to once all the criteria are matched. Once these alerts are set, they will be placed under the “New Opportunities” tab. This alert function will monitor your selected stocks very closely for you and you will be informed of any significant technical movement of your selected stocks.

Alert emails will be generated automatically when events of significance match your alert criteria. The alert criteria may be the price and volume of stock or a technical price movement in a specified period of time. The following are the steps for you to create a new alert.

(1) Click on the “Alerts” tab at the top of the page.
(2) Click on the “Add Alert” button.
(3) Select the type of alert of your wish and click “Next”.

(4) Select the Instrument, Exchange and Industry type and click “Next”.

Alerts

Use this wizard to create alerts. The system will automatically notify you a few hours after market close, when events of significance occur.

Step 1: Select an Alert Type

Provide a name for your alert for future reference, and select the type of alert you want to set up.

Alert Name

Alert Type

New Opportunities:
- Alert me about new opportunities.

Which List:

Specific Security:
- Alert me about Technical Event® opportunities for symbols of interest.

Alert me about Technical Event® opportunities for an instrument.
- Alert me when the instrument's price crosses a threshold.
- Alert me when the instrument's price crosses a support/resistance line.

Steps:
- Alert me when the instrument's price crosses a stop-loss level.

Next >>

Step 2: Instrument Universe Selection

Provide details about the market and industry in which you want new opportunities.

Instrument Details

Instrument Type: Security
ETFs Only
Exchange: Singapore Exchange
Industry: All

<< Previous

Next >>
(5) Enter the alert criteria and choose the Delivery Options.
(6) Click “Finish”.

**Alerts**

Use this wizard to create alerts. The system will automatically notify you a few hours after market close, when events of significance occur.

**Step 3: Alert Details**

Securities from the S$K exchange

**Price and Volume**

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<thead>
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<th>Min</th>
<th>Max</th>
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<tbody>
<tr>
<td>Price on Event Date</td>
<td></td>
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<tr>
<td>Volume on Event Date</td>
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<td></td>
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<tr>
<td>Market Capitalization</td>
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</table>

**Event Type** (Find companies with these types of events)

- Classic Patterns
- Short-term Patterns
- Indicators
- Oscillators
- Bullish
- Bearish
- Other (stock price pattern only)
- Any (bullish, bearish or other)

**Event Time**

Any, Classic Pattern Type

**Event Specific Information**

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<thead>
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<th></th>
<th>Min</th>
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<tbody>
<tr>
<td>Price Period</td>
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<tr>
<td>Event Duration</td>
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<tr>
<td>Inbound Trend Duration</td>
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<td>Positive Percentage</td>
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**More Conditions**

- Price is above the 200 day moving average (optional) at least ______

**Submit**

Note: Be sure to click the Submit button below for your changes to become effective.

These alerts will be sent a few hours after market close in HTML format.

Change alert format to:

- HTML (details included)
- Text (details included)
- Notification Text (Headlines only)

Submit
**Tracking Your Stocks of Interest**

On the Overview page, you will see a section named “Instruments I’m Following”. This section will track the performance of the stocks that you are interested in. Just click on the “Add an Instrument” button, key in the ticker symbol of your counter of interest, select your view and ChartWhiz will help you monitor your stocks for you. ChartWhiz will monitor the performance of your preferred stocks for you, and will update you daily to let you know if your predictions are correct based on the preset date’s price of the stock. You can make use of this feature to monitor the profit and loss of the shares you have on hand. Monitoring of stocks becomes as easy as ABC.
Learning the Different Technical Tools
ChartWhiz uses the different technical tools to spot significant price movements of all the counters in the various exchanges. To understand more about the various technical tools, you can go to the “Education Material” section on the Overview page. Click on the top right hand corner of that section to get into the menu page. You will then be able to see the different bullish and bearish technical indication tools. These tools are classified into the different categories such as Classic, Short-term, Indicators and Oscillators. Clicking on the name of the tool will lead you to a detailed explanation on what is tool is all about and how it works. Instead of just relying on the ChartWhiz technical analysis blindly, you are now able to learn the workings of all the technical tools used by ChartWhiz in detail, thus allowing you to invest and trade with knowledge.

Conclusion
ChartWhiz is powered by Recogia and it assists our clients in making investment decisions as well as monitoring their portfolio of stocks for them. ChartWhiz is designed in such a way that you can understand and use the tools very easily. ChartWhiz certainly reduces your time and effort spent on stock analysis, at the same time maximizing your investment returns.
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