POEMS 2.0



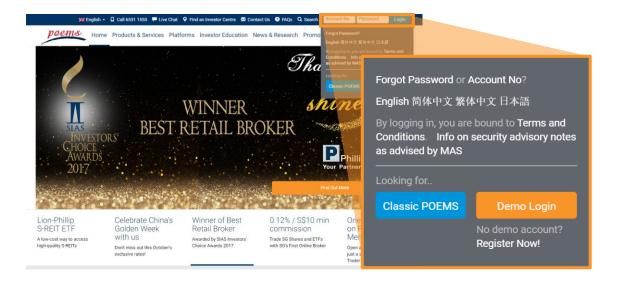
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GETTING STARTED

Logging in to POEMS 2.0

Step 1: Type in URL https://www.poems.com.sg



Step 2: For www.poems.com.sg key in login details at the top right corner For p2.poems.com.sg key in login details in the fields provided

COMPATIBILITY CHECK

A Compatibility Check helps to identify what should be enabled in the user's system in order to maximize the performance of POEMS 2.0.

On p2.poems.com.sg click **Browser Compatibility** to do a compatibility check on your system.

Compatibility Check



Browser Check

This browser is supported for using POEMS 2.0.



Cookies Check

Cookies are enabled.

POEMS 2.0 uses a cookie to keep track of your current session. You must have cookies enabled so we can maintain your current state as you navigate through the system.



Javascript Check

Javascript is enabled.

Almost all the widgets in POEMS 2.0 relies on Javascript for the ability to generate interactive web pages. Javascript would need to be enabled.



Java Check

Java is disabled Enable cookies in **Google C**

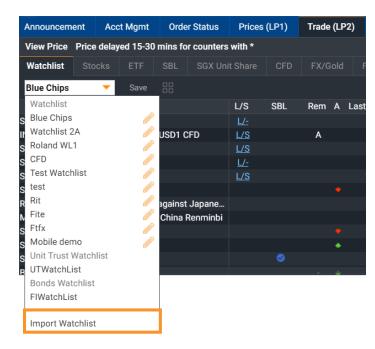
Enable cookies in **Google Chrome**: (Click <u>here</u> for more information)

- Focus at url bar
- Type 'chrome://plugins/'
- Find 'Java'
- Click Enable
- · Refresh the page

GETTING STARTED

Import your Watchlist from Classic POEMS

(For existing POEMS clients. For new clients, refer to page 7 to learn how to build your Watchlist)

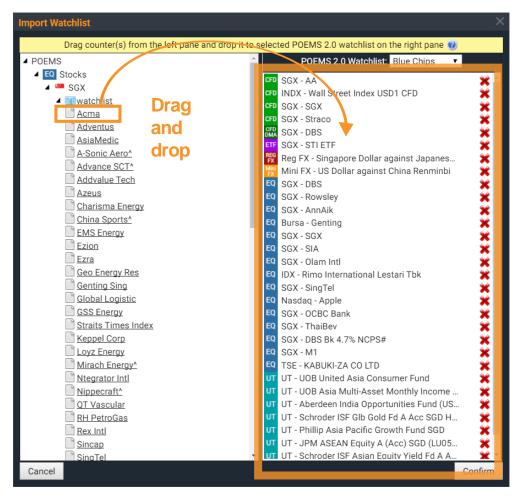


Step 1: In the Trade (LP2) tab, click on Watchlist sub-tab, click on the dropdown list and select Import Watchlist

Step 2: Drag and drop counters/watchlists from the Left column (POEMS Classic) and into the space in the Right column (POEMS 2.0)

To build your Watchlist in POEMS 2.0, go to page 7

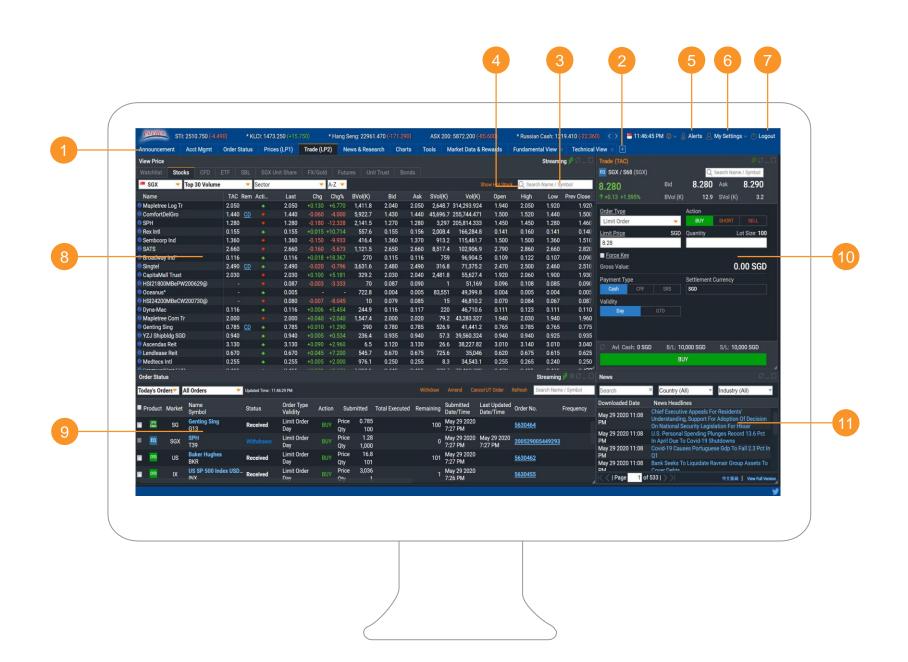
Note: POEMS 2.0 watchlist is synchronized with your POEMS Mobile 2.0. Editing your watchlist in POEMS 2.0 will affect your POEMS Mobile 2.0 watchlist and vice versa.



GETTING STARTED

Overview

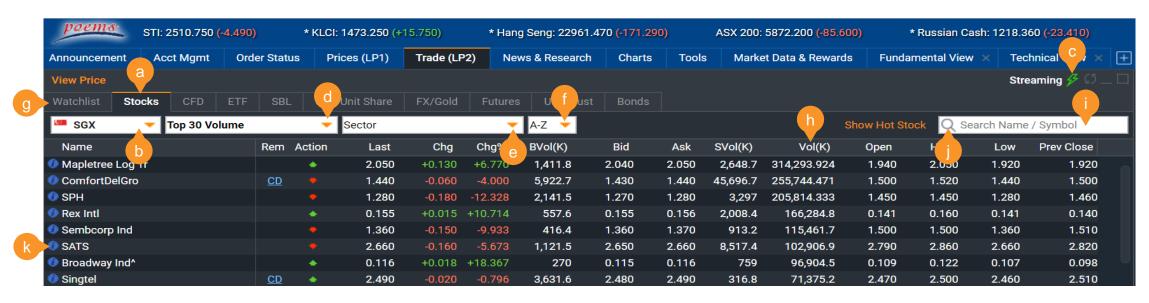
- 1. Main navigation bar
- 2. Add a new tab (workspace)
- 3. Search for instrument
- Advanced Search
- 5. Alerts
- 6. Settings
- 7. Log out
- 8. View Price
- Order Status
- 10. Trade
- 11. News



Prices (LP1) | Watchlists | Chart Live | Market Depth | Time and Sales | Trade Summary | News & Research | Stock Analytics | Price Alerts

Prices (LP1)

View real-time/delayed price data for all counters on Top 30 lists of Watchlists



- a. Select Product Type
- b. Select Exchange
- c. Toggle between Streaming and Static prices
- d. View Top 30 Volume, Gainers and Losers

- e. Select from list of main sectors
- f. A-Z dropdown list to display counters alphabetically
- g. Go to Global Watchlist
- h. Click on individual column headers to sort by column

- Search for counter to be added to Watchlist
- Advanced search function
- Click on icon to view counter's trading info

Prices (LP1) | Watchlists | Chart Live | Market Depth | Time and Sales | Trade Summary | News & Research | Stock Analytics | Price Alerts

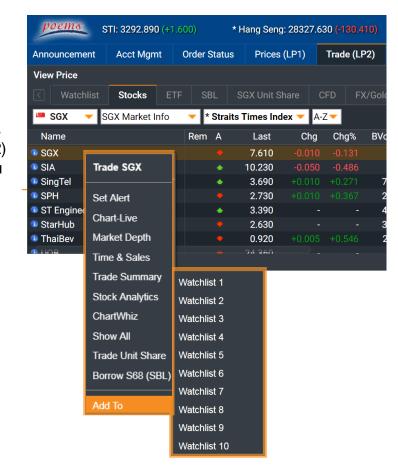
Watchlists (Adding Counters)

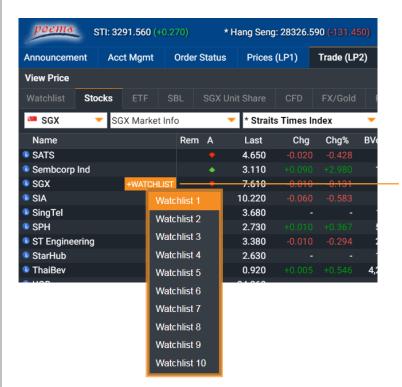
Three methods to add counters to your Watchlists

METHOD 1: Right-click on counter

Step 1: Right-click on counter in Prices (LP1) or Trade (LP2) to display sub menu

Step 2: Go to 'Add To' and select the Watchlist you wish to add to





METHOD 2: Hover and click on +WATCHLIST

Step 1: Move your mouse over the counter

Step 2: Click on the +WATCHLIST button and select the Watchlist you wish to add to

Prices (LP1) | Watchlists | Chart Live | Market Depth | Time and Sales | Trade Summary | News & Research | Stock Analytics | Price Alerts

Watchlists (Adding Counters)

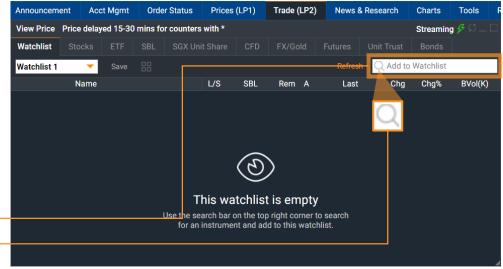
Three methods to add counters to your Watchlists

METHOD 3: Using the Basic Search or Advanced Search Function

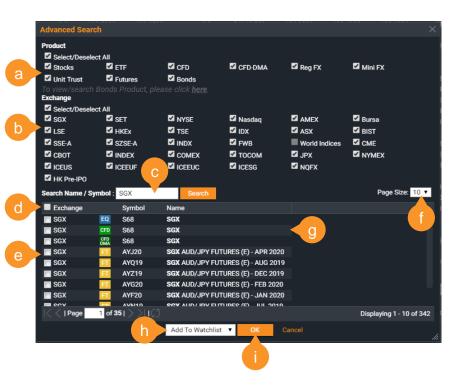
Step 1: Go to Watchlist sub-tab in Prices (LP1) or Trade (LP2)

Step 2: Use the Basic
Search or Advanced
Search to search for your
counter - a list of
suggested counters will
be shown

Step 3: Click on the counter to add it to your selected Watchlist



- a. Select/Deselect Product Type
- b. Select/Deselect Exchange
- Search for counter by name or symbol
- d. Select/Deselect all counters displayed below
- Select/Deselect individual counters



- Display up to 30 counters per page
- g. Search results
- Choose Watchlist to add to
- Click to add counter(s) to selected Watchlist

Prices (LP1) | Watchlists | Chart Live | Market Depth | Time and Sales | Trade Summary | News & Research | Stock Analytics | Price Alerts

Watchlists (Customise)

Rearrange and customize columns

ADD/REMOVE COLUMNS

Right-click on column header for sub-menu to edit columns

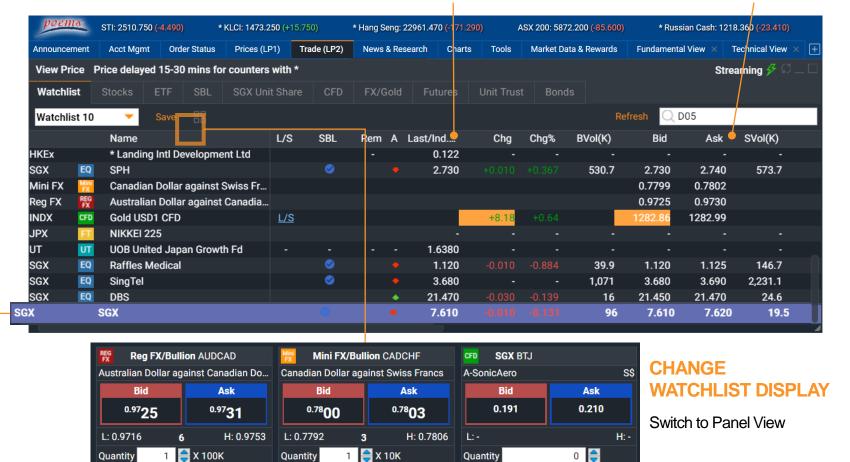
REARRANGE COLUMNS

Click and drag column to rearrange order

WHERE ARE MY RECENTLY ADDED COUNTERS?

By default, the new counter added to your Watchlist will be displayed at the last row

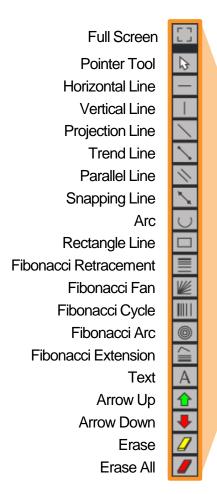
Click and drag the counter row to rearrange the order



Prices (LP1) | Watchlists | Chart Live | Market Depth | Time and Sales | Trade Summary | News & Research | Stock Analytics | Price Alerts

Chart Live

Real-time streaming charts, customizable settings and technical indicators





- a. Change cycle
- b. Change time period
- c. Add indicators
- d. Chart settings
- e. Search for counter by name or symbol
- Select counter after adding from search function
- g. Counter name and details
- h. Drawing tools
- i. Right-click for chart display settings
- j. Indicators display
- k. Timeline navigator
- I. Export / print chart image

Prices (LP1) | Watchlists | Chart Live | Market Depth | Time and Sales | Trade Summary | News & Research | Stock Analytics | Price Alerts

Market Depth

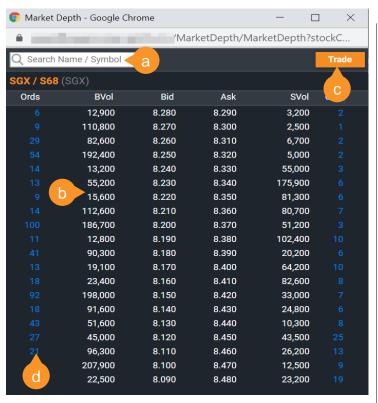
View a total list of the available SGX and HKEx buy/sell prices in the queue

OPEN MARKET DEPTH WINDOW

Step 1: Right-click on the specific counter in Prices (LP1) or Trade (LP2) to display sub menu

Step 2: Select Market Depth or Show All to bring up the Market Depth window or the selected counter

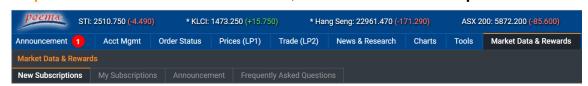
*Note: Enhanced Market Depth is currently only available for SGX



- a. Search for any SGX/HKEx to bring up its Market Depth
- b. Buy and Sell volumes at different prices levels
- c. Open new trade window
- d. Number of Buy and Sell Orders that totaled up volume at each price level*

SUBSCRIBE TO MARKET DEPTH

Step 1: In the Market Data & Rewards tab, click on the 'New Subscriptions' tab



Step 2: Subscribe to 'Hong Kong Stock Exchange Live Price + Market Depth' for HKEx market depth or 'SGX Market Depth Access - 20Q (Per Month)' for SGX market depth

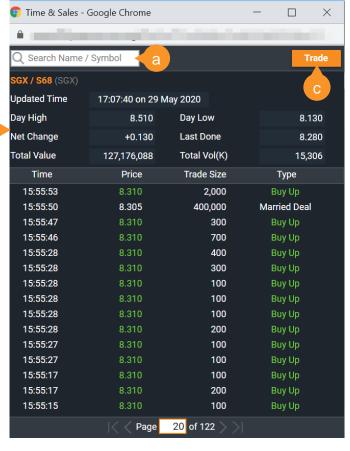


Note: For more info on redeeming Rewards items, refer to page 26

Prices (LP1) | Watchlists | Chart Live | Market Depth | Time and Sales | Trade Summary | News & Research | Stock Analytics | Price Alerts

Time and Sales

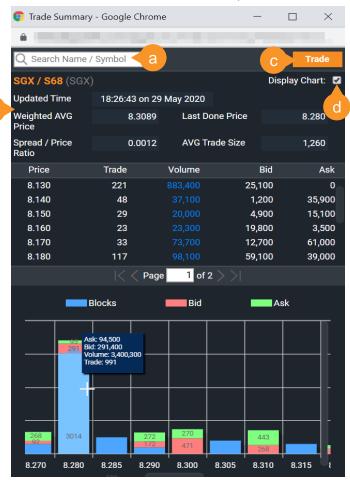
View time and sales data of specific counters



- Search for any counter to bring up its Time and Sales
- b. Selected counter's daily trade summary / information
- c. Open new trade window
 - Search for any SGX counter to bring up its Trade Summary
 - b. Counter's Trade Statistics
 - c. Open new trade window
 - d. Show Trade Distribution Chart

Trade Summary

This summary shows the stock movement in terms of volume traded at different price levels



Prices (LP1) | Watchlists | Chart Live | Market Depth | Time and Sales | Trade Summary | News & Research | Stock Analytics | Price Alerts

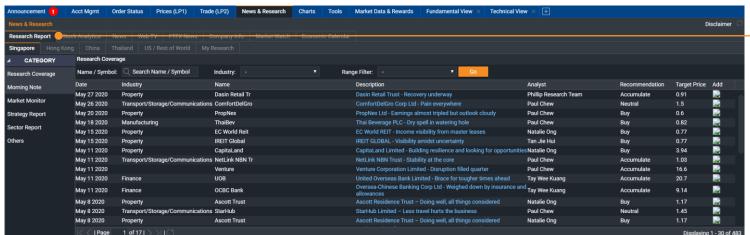
News & Research

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

NEWS (POWERED BY FACTIVA)

Search/filter counter specific news by country or industry. News includes equity, economic and dividend news, analyst rating and hot stocks.





RESEARCH REPORTS

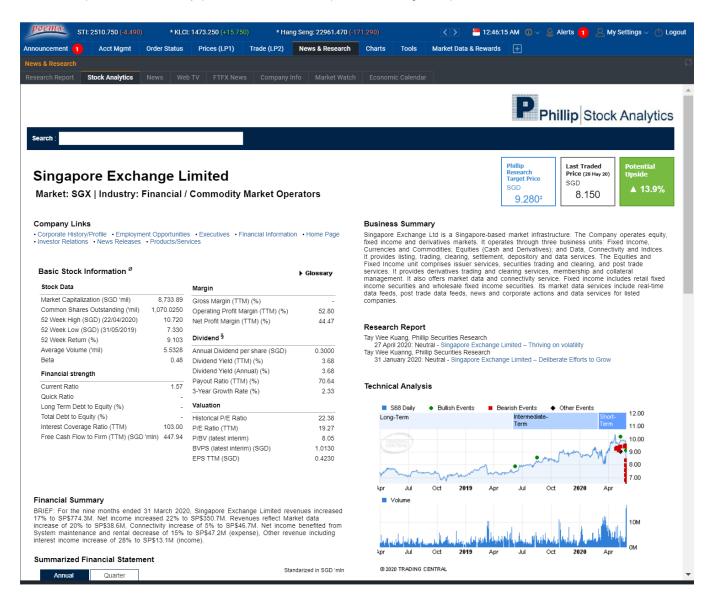
Displays the research coverage for Singapore, Hong Kong, Thailand, US and Rest of World

Prices (LP1) | Watchlists | Chart Live | Market Depth | Time and Sales | Trade Summary | News & Research | Stock Analytics | Price Alerts

Stock Analytics

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

- >> Essential Stock Fundamentals
- » Business Summary
- >> Summarised Financial Data
- » Updated News Headlines from Dow Jones
- » Links to Financial Statements/Investors Relations
- » Technical analysis charting from Recognia



Prices (LP1) | Watchlists | Chart Live | Market Depth | Time and Sales | Trade Summary | News & Research | Stock Analytics | Price Alerts

Price Alerts

Receive alerts wherever you go, whichever platform you choose to. Sitting at your desk? The pop-up notification will inform you about price changes. Travelling around? No problem! Simply stay up-to-date with mobile push notifications.

Advantages of Price Alerts

» FREE!

Price Alerts is a service absolutely free of charge to you. No cash or no reward points required!

» Synchronized across platforms

Your Price Alerts will automatically synchronize across POEMS 2.0 and POEMS Mobile 2.0.

» No subscription required

Price Alerts is automatically switched on for you. Simply set your alerts and you are ready to go!

» Available for Stocks, CFD and Unit Trusts

*Price Alert is available for the following exchanges: SGX, NYSE, NASDAQ, AMEX, BURSA, LSE, HKEX, TSE, SSE-A, SZSE-A.



You can receive Price Alerts in the following ways:







Mobile Push Notifications

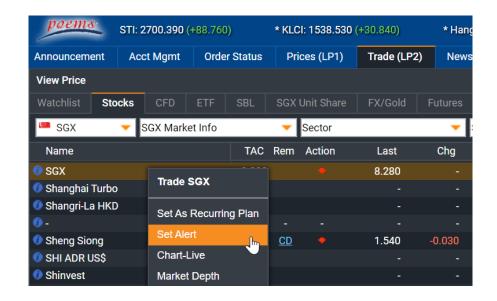
Prices (LP1) | Watchlists | Chart Live | Market Depth | Time and Sales | Trade Summary | News & Research | Stock Analytics | Price Alerts

Price Alerts (Setting Alerts)

METHOD 1: Right-click on counter

Step 1: Right-click on counter in Prices (LP1) or Trade (LP2) to display sub menu

Step 2: Go to 'Set Alert' and a popup will appear for you to configure your alert

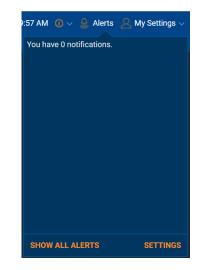


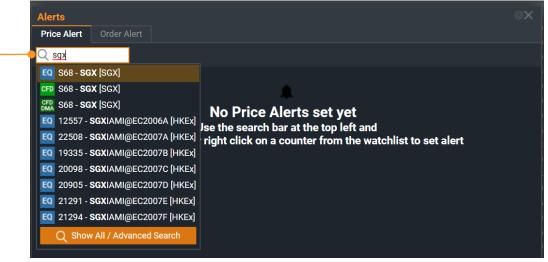
METHOD 2: Click on Alerts tab

Step 1: Click on the Alerts tab on the top right corner

Step 2: Click on Show All Alerts

Step 3: Enter your desired counter name and click on it





Prices (LP1) | Watchlists | Chart Live | Market Depth | Time and Sales | Trade Summary | News & Research | Stock Analytics | Price Alerts

Price Alerts (Setting Alerts)

Price alerts can be configured based on:

» Target Price

Set High or Low price targets based on Bid/Ask or Last Done Price

» % Change

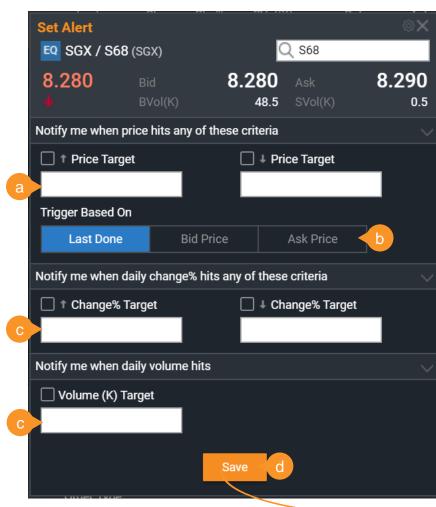
Set percentage increase or decrease targets based on Last Done Price

» Target Volume

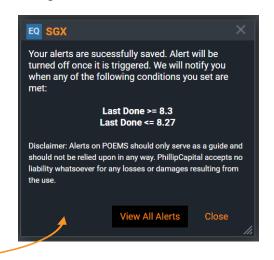
Set Daily Volume targets

You can set up to 50 price alerts.

Manage your alerts by clicking on the Alerts tab > Show All Alerts



- a. Enter the Target Low Price and/or High Price
- Select trigger based on Last Done, Bid Price or Ask Price
- Add additional criteria such as % change or volume target
- d. Click "Save" to complete your price alert setting

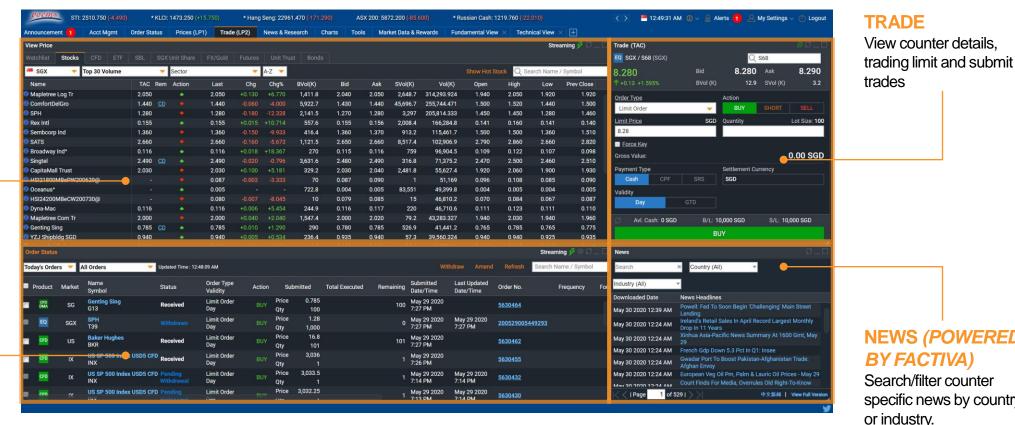


Trade (LP2) | Submitting a Trade | Order Status | Product and Order Types | Recurring Order Type

Trade (LP2)

View live prices, trade and check order status in this tab





ORDER STATUS

Check the status of submitted orders

NEWS (POWERED BY FACTIVA)

Search/filter counter specific news by country or industry.

Trade (LP2) | Submitting a Trade | Order Status | Product and Order Types | Recurring Order Type

Submitting a Trade

There are 2 methods to submit a trade in POEMS 2.0

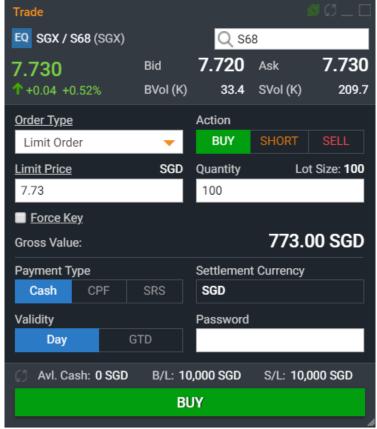
METHOD 1: Using Trade (LP2) tab

Step 1: Click once on specific counter in the **View Price** widget. The selected counter's last done price will show in the **Trade** widget on the right.

Step 2: The Limit Price and Total Quantity* can be selected from the drop-down menu or through manual input. The Gross Value is calculated based on the selection.

Step 3: After selecting the Trade Action [BUY or SELL or SHORT SELL (SGX only)], enter in the password in the password field and click on the BUY/SELL/SHORT SELL button.

Step 4: On the next screen, click SUBMIT and the order will be submitted.



*The figures in Quantity menu will remember the previous quantity keyed in for the same counter for convenience purposes. It does not reflect the amount you actually hold.



METHOD 2: Right click on counter

Step 1: Right click on counter throughout the platform to bring up the sub menu

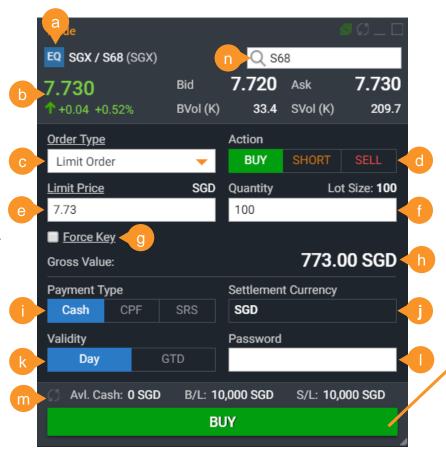
Step 2: In the sub menu, select Trade <counter name> to open a new Trade widget

Trade (LP2) | Submitting a Trade | Order Status | Product and Order Types | Recurring Order Type

Submitting a Trade

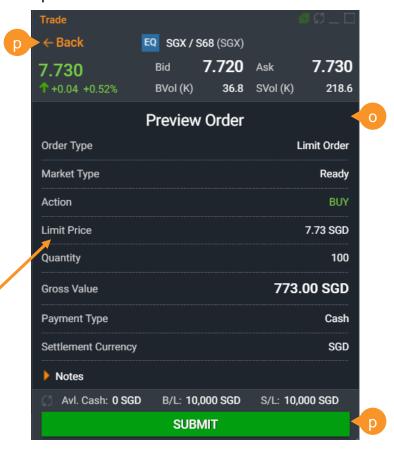
Trade widget explained

- Product type selected
- Details of selected counter
- Select order type (differs with product/market)
- d. Select trade action
- e. Set price through manual input
- f. Set total quantity through manual input
- g. Check to activate Force Key
- h. Gross value based on price and quantity
- Select Trade Type (for SGX only): Cash, CPF or SRS
- Settlement Currency of current order
- K. Select Validity of current order
 (Good-Till-Date order up till 30 days)
- Key in Password
- m. Current Available Cash, Buy/Sell Limit
- n. Search for counter by name or symbol



After clicking on BUY or SELL or SHORT SELL, this confirmation window will appear.

- o. Double check your order submission details here.
- Click SUBMIT to proceed or <- Back to return to previous menu.



Trade (LP2) | Submitting a Trade | Order Status | Product and Order Types | Recurring Order Type

Submitting a Trade

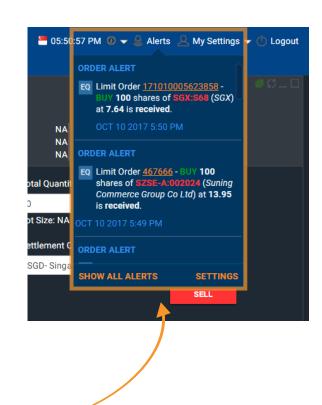
After submitting a trade

ORDER ALERTS

After every order submission, an order alert will pop up at the bottom right-hand corner to notify you that the order has been received. Same applies for order withdrawals and amendments.

Change alert settings in the Alert Settings menu.





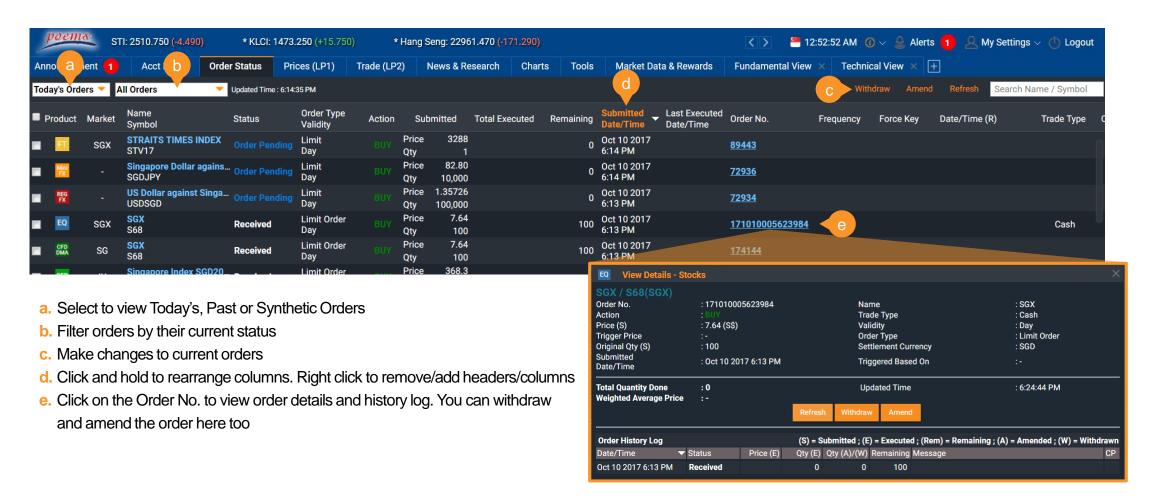
Your alerts can also appear in the **Alerts** menu on the top right-hand corner. Click the button to see the dropdown list of Alerts that were triggered previously.

Note: For more info on options to receive Order Alerts, please refer to page 36

Trade (LP2) | Submitting a Trade | Order Status | Product and Order Types | Recurring Order Type

Order Status

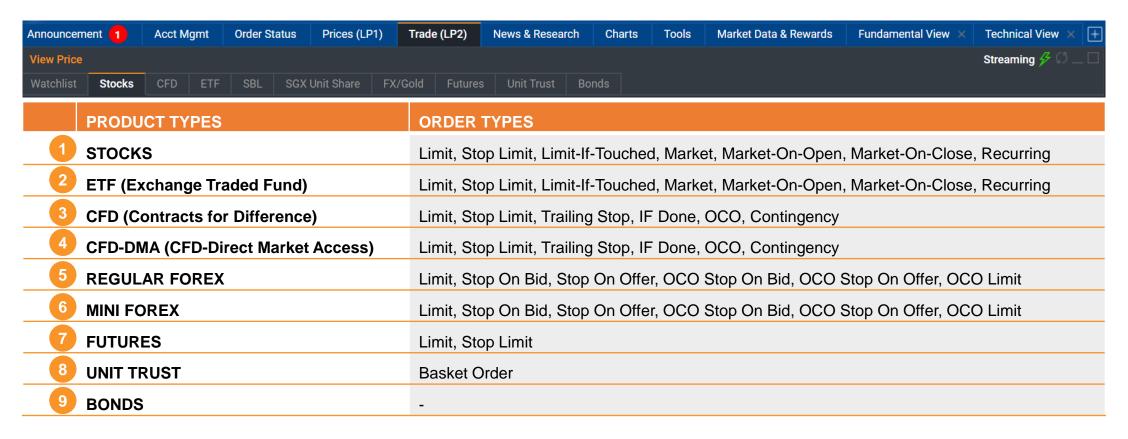
View your working and past orders in the Order Status tab



Trade (LP2) | Submitting a Trade | Order Status | Product and Order Types | Recurring Order Type

Product and Order Types

POEMS 2.0 has 9 product types over 15 global exchanges



Trade (LP2) | Submitting a Trade | Order Status | Product and Order Types | Recurring Order Type

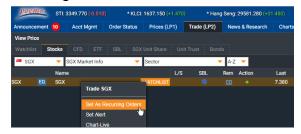
Recurring Order Type

Gradually build your portfolio over a period of time with a fixed amount of regular investment that is determined by you

HOW DO I PLACE A RECURRING ORDER?

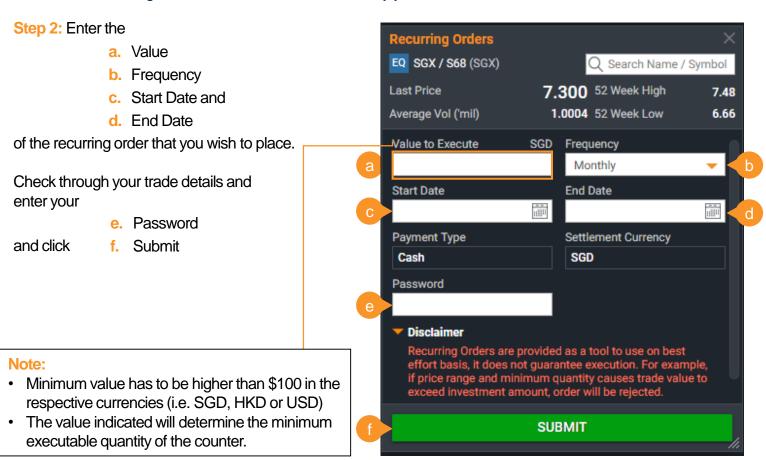
Step 1: Open the recurring order widget. There are two ways you can place a recurring order.

Method 1: Search for the desired counter that you wish to set a recurring order for. Right click on the selected counter and select "Set as Recurring Orders".



Method 2: Create a new widget and search for "recurring". Select "Recurring Orders" and search for your desired counter using the search bar.





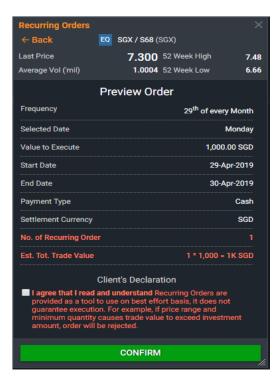
Trade (LP2) | Submitting a Trade | Order Status | Product and Order Types | Recurring Order Type

Recurring Order Type (cont.)

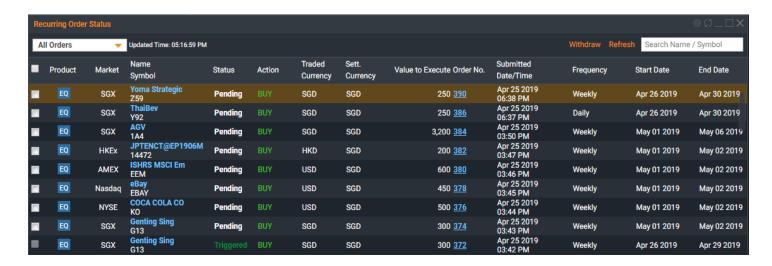
Gradually build your portfolio over a period of time with a fixed amount of regular investment that is determined by you

HOW DO I PLACE A RECURRING ORDER?

Step 3: Preview the order. If the details are accurate, tick on the checkbox and click on the confirm button.



Step 4: Check the order status under the "Recurring Order Status" widget to ensure that the details are correct.



Note:

- Recurring Orders placed are reflected under the Recurring Order Status widget
- Do check out the Recurring Order Status for un-triggered order status and to perform withdrawal (if required)
- When a recurring order is triggered, it will send out as limit order and it will only be reflected on default order status page.

Announcements | Account Management | Bank Account Information | Deposit Fund | e-Statements | Live Positions | Market Data & Rewards

Announcements

Stay informed with the latest notices and announcements

a. Attention

Latest announcements and market information

b. POEMS

Announcements

Announcements that are POEMS platform specific

C. Exchange Rate

The exchange rate for various currencies, contract settlement and online currency conversion

d. Corporate

Action/Dividend

The list of Bonus and Dividends currently available for counters



e. New Counters

List of new counters recently added to respective markets

f. List of Marginable Stocks

List of marginable stocks (for margin accounts)

g. Important Notes

Important Futures/Forex information (for Futures/Forex accounts)

h. Notification

Be notified of any new and unread notices

Announcements | Account Management | Bank Account Information | Deposit Fund | e-Statements | Live Positions | Market Data & Rewards

Account Management

Review your account and other related information (Stocks)

a. Outstanding Position

All your outstanding positions of your trades due for payment

b. Account Details

Your account details, including available cash, credit limit etc.

c. Scrip Positions

Total share holdings you have in Phillip (for all accounts except Cash Trading Account)

d. Scrap Book

Holdings info, including realized and unrealized profit/loss for all accounts

e. Live Positions

Provides overview of the profit and loss performance of your equity trades and/or net holdings

f. Calculator

To calculate the costs when you buy or sell shares as well as profit/loss

9. This Month Transactions

All your transactions for the current month

h. Transactions History

All your transactions for up to 12 months

i. Settled Positions

All outstanding positions successfully settled for the current and previous months

Cash Dividends

Shows the cash dividends that have been processed in the past till date

k. Upcoming Corp.Action

Shows the upcoming corporate actions

Online Forms

Online forms for withdrawal, currency conversion etc.

m. CAR & CKA Forms

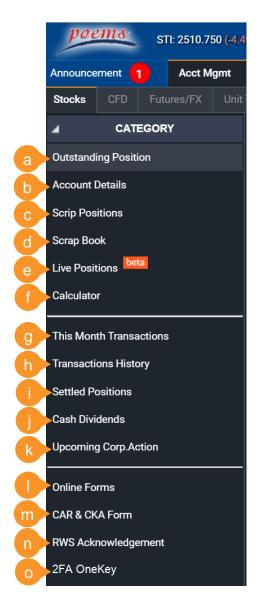
Customer Account Review (CAR) and Customer Knowledge Assessment (CKA) Form

n. RWS Acknowledgement

Risk Warning Statement (RWS) acknowledgement to trade overseas-listed investment products

2FA OneKey

Register/activate your Two-Factor Authentication (2FA) OneKey device

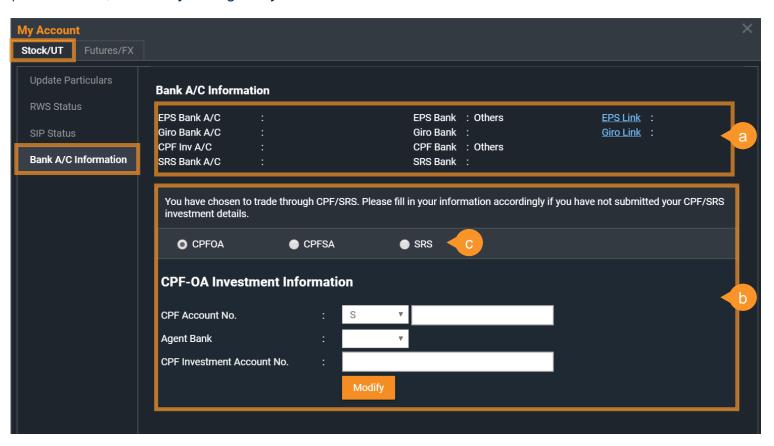


Announcements | Account Management | Bank Account Information | Deposit Fund | e-Statements | Live Positions | Market Data & Rewards

Bank Account Information

Review details of your linked bank account(s). You may also link your CPF/SRS investment account to your POEMS Trading Account.

(To access this, click on My Settings > My Account > Stock/UT > Bank A/C Information tab.

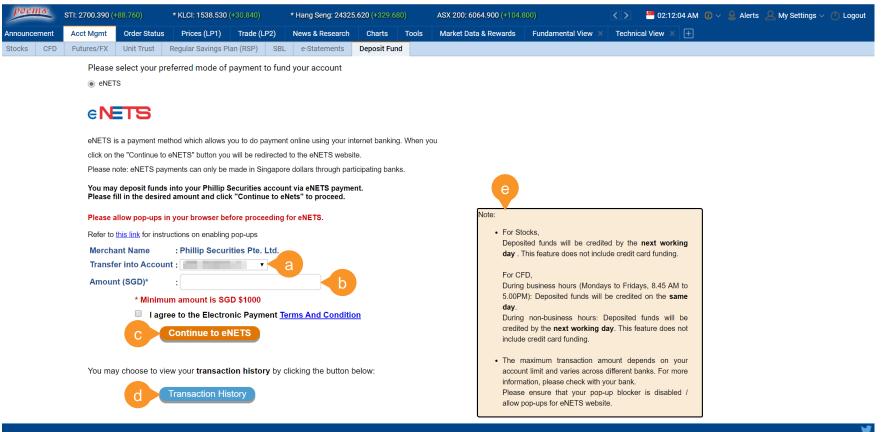


- a. Details of your linked bank account(s)
- Section to link your CPF/SRS investment account
- C. Choose the type of investment account (CPFOA/CPFSA/SRS) that you want to link

Announcements | Account Management | Bank Account Information | Deposit Fund | e-Statements | Live Positions | Market Data & Rewards

Deposit Fund

Deposit funds into your POEMS Trading account via eNETS payment method (*To access this, click on Acct Mgmt > Deposit Fund*)



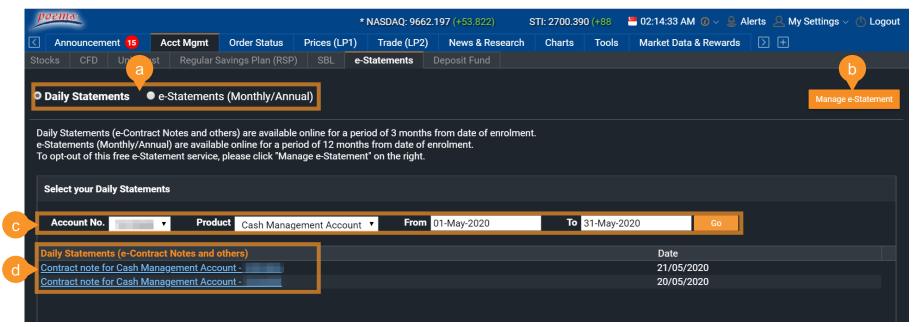
- Select the POEMS Account that you would like to transfer your funds to
- Enter the amount that you like to transfer to your trading account
- C. Continue to proceed with the transfer after confirming your transfer details, understanding the T&Cs
- d. View the your Transaction History
- e. Information on funds crediting for Stocks and CFD

Announcements | Account Management | Bank Account Information | Deposit Fund | e-Statements | Live Positions | Market Data & Rewards

e-Statements

Access your account statements anytime, anywhere with our e-Statement services.

Customers with a POEMS account and a valid email address will be auto-enrolled for this service. Once enrolled, subsequent statements for all accounts will be made available online.



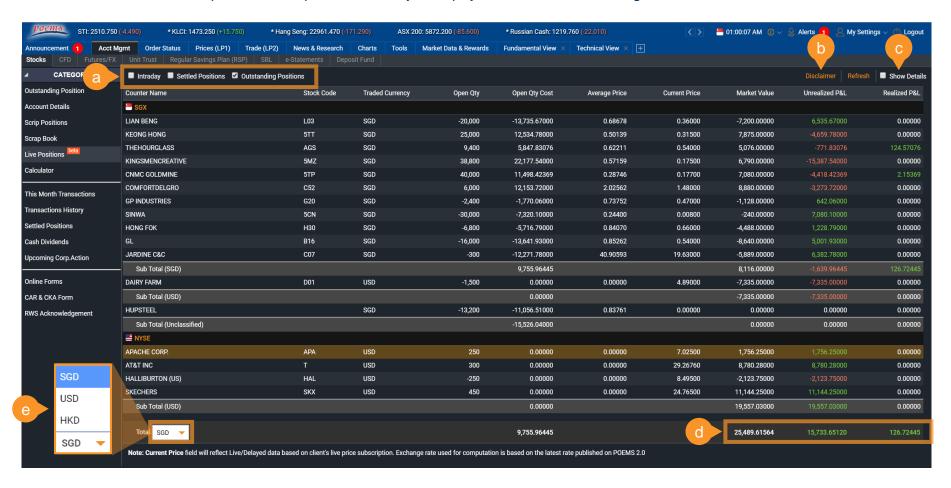
Contract notes and Monthly statements are available online for a period of 3 and 12 months respectively from date of enrolment. You will receive email notification(s) when your e-Statements are ready for viewing.

- a. Choose to view your Daily/Monthly/Annual Statements
- b. Manage your e-Statement subscription (Physical/e-Statement)
- C. Filters by Account Number,
 Product Type and the Time Period
- Click on the hyperlinks to view/download your e-Statements

Announcements | Account Management | Bank Account Information | Deposit Fund | e-Statements | Live Positions | Market Data & Rewards

Live Positions

Overview of the live profit and loss performance of your equity trades and/or net holdings



- a. Options are selected by default. Depending on your account type, different options will be available*
- Learn how figures in Live
 Positions are computed
- c. Click on the 'Show Details' option to see more detailed information like (i.e. Buy/Sell Quantity, Average Buy/Sell Price etc.)
- d. View the overall performance of your live positions via 'Market Value', 'Unrealized P&L', and 'Realized P&L'
- e. View the total summary of P&L in preferred base currency (SGD, USD, HKD)

*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.

Announcements | Account Management | Bank Account Information | Deposit Fund | e-Statements | Live Positions | Market Data & Rewards

Market Data & Rewards

Redeem items and services from POEMS Market Data & Rewards Programme

HOW DO I REDEEM MY REWARDS

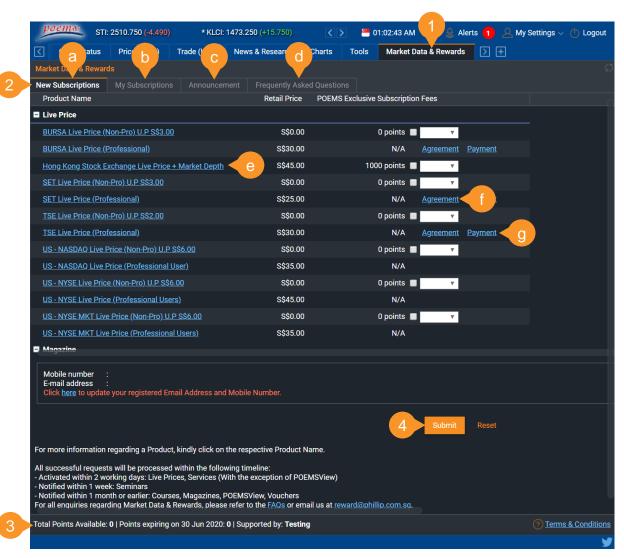
Step 1: Go to the Market Data & Rewards tab and click on New Subscriptions sub-tab

Step 2: On this tab, you will see items grouped in sub categories available for subscription/redemption, click the sub headers to display full list of items. Check the box next to the item for selection

Step 3: Ensure sufficient rewards points are available

Step 4: Click on 'Submit' to proceed to review and confirm your request

- a. View available products for subscription/redemption
- b. View the products that you have subscribed/redeemed
- c. Find out latest news on Market Data & Rewards
- d. Access to the FAQs of Market Data & Rewards
- e. Click on respective product to find out information related to it
- Complete the required Agreement before subscribing for Professional Live Price
- g. Leads to the Withdrawal Form for you to make the required payment



Workspaces | Tabs and Widgets | Settings | Alert Settings

Workspaces

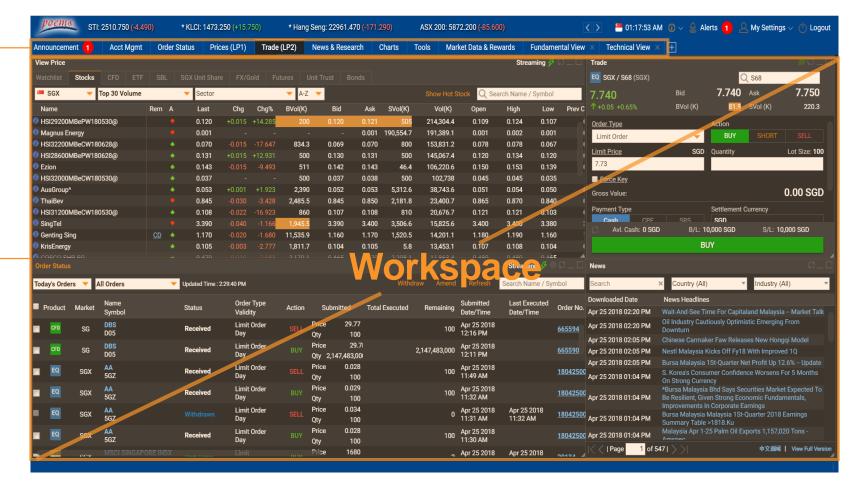
Customise your trading experience with personalised workspaces



In POEMS 2.0, trading functions and tools are organised by tabs. By default, you'll have a standard set of tabs.

WHAT ARE WORKSPACES?

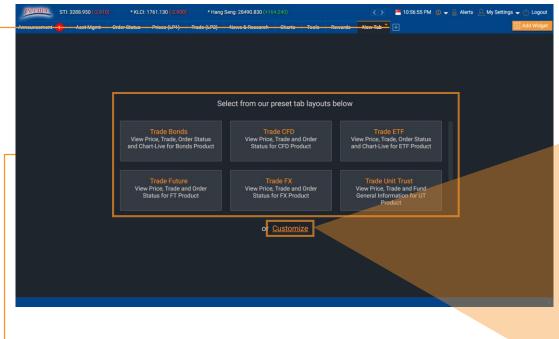
Within each tab is a workspace which you can add in trading tools (we call them widgets), group and resize them to your preference



Workspaces | Tabs and Widgets | Settings | Alert Settings

Tabs and Widgets

Adding new tabs and widgets



HOW DO I ADD A NEW TAB?

Step 1: To add a new tab, click on the + button

Step 2(a): Choose one of our suggested tab layouts from the list here

Step 3: Click on the arrow on the newly created tab to Rename, Remove or Save tab

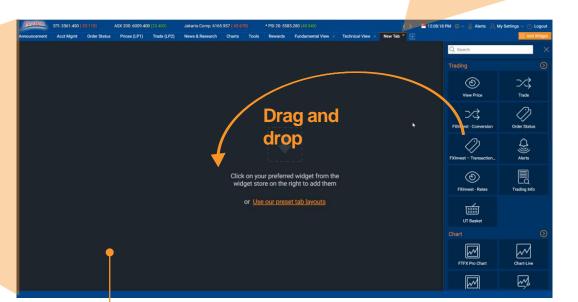
New Tab

Rename

Remove this Tab

Save tab as

Step 2(b): Alternatively, you may customise your new tab by mixing and match widgets from our widget store



You may add up to a maximum of 6 widgets per tab

Workspaces | Tabs and Widgets | Settings | Alert Settings

Settings

Make functional and aesthetic changes under Settings

a. Preferences

Choose preferred theme, language and font size

b. Login and Password

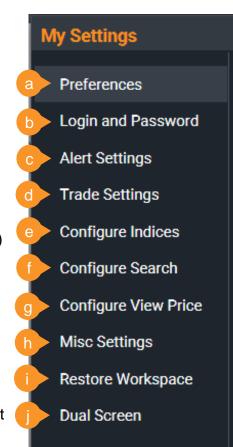
Set session time out period and change password

c. Alert Settings

Turn notifications on/off, select which order status(es) to be notified of And update of email address/mobile number of alerts

d. Trade Settings

Modify trade related actions, password verification, default trade quantity etc.



e. Configure Indices

Turn on/off scrolling indices and choose which indices to show

f. Configure Search

Modify Advanced Search filter and options

g. Configure View Price

Turn on/off +Watchlist overlay button

h. Misc. Settings

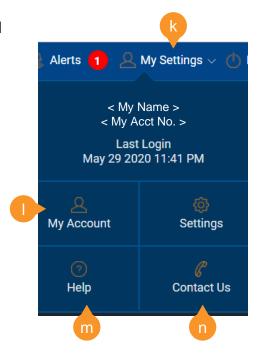
To switch Twitter shortcut on/off

Restore Workspace

Restore entire tabs and workspaces layout back to default

J. Dual Screen

Select this option to open a new separate POEMS 2.0 window



k. My Settings

Access the Settings menu via 'My Settings' on the top right-hand corner

My Account

View or update mobile number, email address or SRS/bank information etc.

m. Help

See platform related guides

n. Contact Us

View your trading representative details or send us a message

Workspaces | Tabs and Widgets | Settings | Alert Settings

Alert Settings

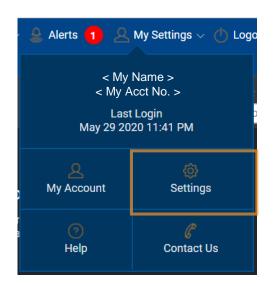
Configure alerts under Settings

Method 1:

Step 1: Access the 'Settings' menu via 'My Settings' on the top right-hand corner

Step 2: In the sub menu, select Alert Settings

Step 3: Customize your settings for alerts

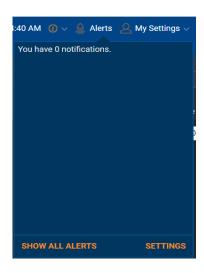


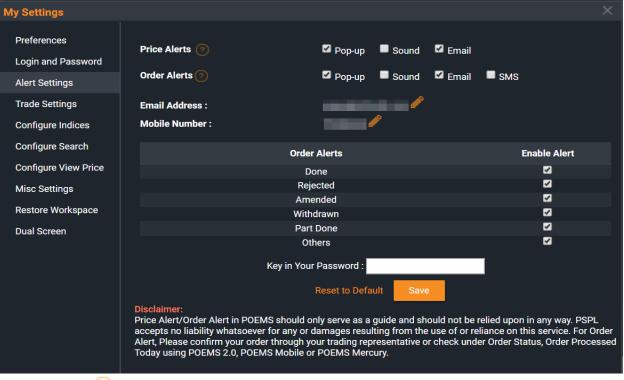
Method 2:

Step 1: Access the 'Alerts' menu on the top right-hand corner

Step 2: In the sub menu, select Settings

Step 3: Customize your settings for alerts





Note: Click on to find out more on the Price Alerts and the Order Alerts.