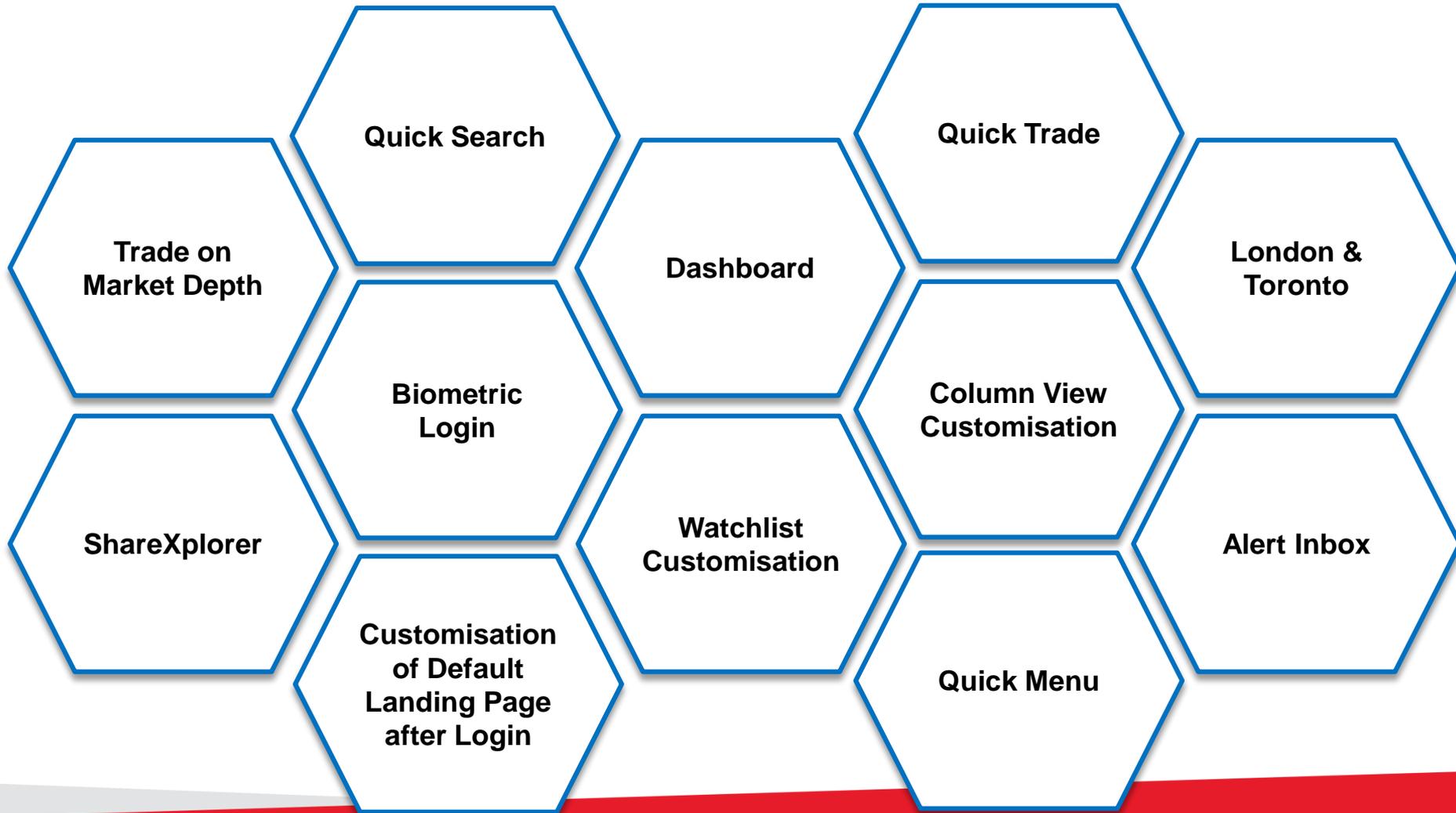

UTRADE SG

New Mobile App Navigation Guide

Key Features



GETTING STARTED

User Guide Navigation Menu

Click on any of the links below to read more about each section:		
Login Page	Quick Trade	Account Management
Dashboard	❖ Order Placement	❖ Trust Balance
Menu ❖ Quick Menu ❖ Main Menu	❖ Order Book	❖ Outstanding Position
	❖ Order Details	❖ TR Details
Market Info ❖ Top Movers ❖ Market Indices ❖ Market Summary ❖ Counter Info ❖ ShareXplorer	Portfolio	❖ Change User ID
	❖ Custody Holdings	❖ Change Password
	❖ Unrealised P/L	Information
	❖ Realised P/L	❖ Announcements
	❖ Add Records	❖ Alert Inbox
Watchlist ❖ Watchlist ❖ Watchlist Editor	❖ E-Statement	Settings
	News & Research	❖ Alert Criteria
		❖ Preference
		❖ Notifications
		Calculator

Login Page

- ❖ Perform login, Face/Touch ID registration, account opening and new password requests.
- ❖ Read important UTRADE-related news and promotions or contact us if you require further assistance.

1. Login

Enter your UTRADE User ID and Password to log in.

2. Face/Touch ID

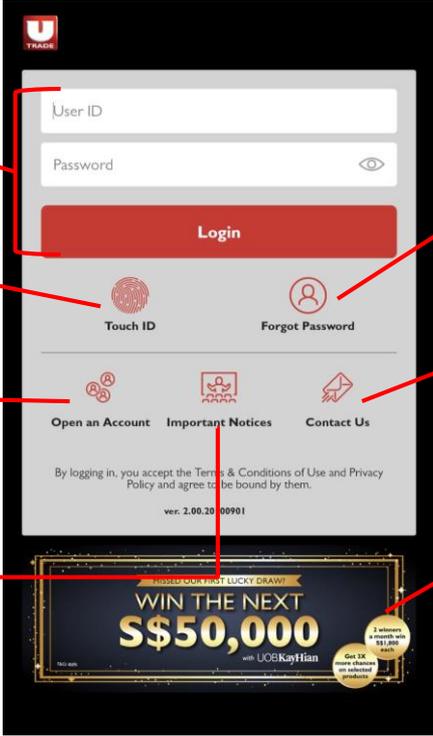
Enable biometric login here.

3. Open an Account

To open a new account with us, simply click here to submit your application.

4. Important Notices

Get the latest information about platform updates and other important news here.



5. Forgot Password

If you have forgotten your password, click here to retrieve it.

6. Contact Us

Click here if you need to speak to one of our Client Services Officers.

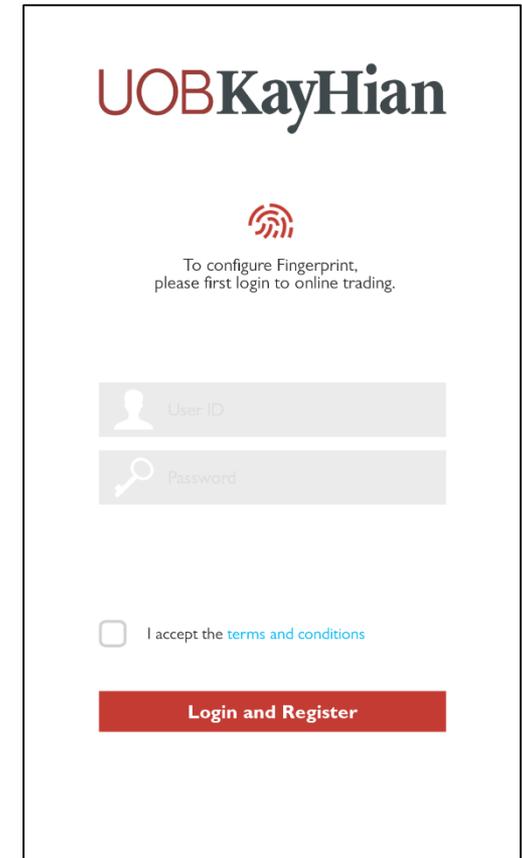
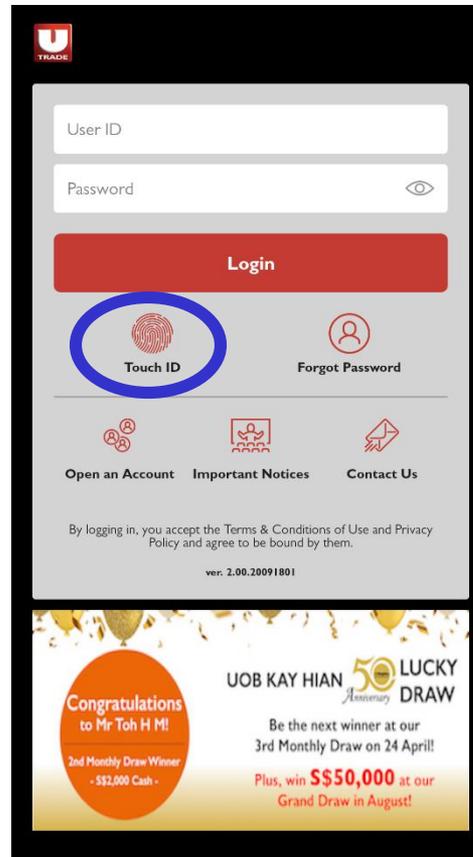
7. Promotions

Click here to find out more about our latest promotions and events.

>> Back to Navigation Menu

How to Register for Biometric Login?

1. Tap the Touch/Face ID button on the Login Page.
2. Enter your User ID and Password. Read and accept the terms & conditions, then click “Login and Register”.
3. A black pop-up box will appear, prompting you to scan your thumbprint or scan your face.
4. Once completed, you will be directed into the app.



>> Back to Navigation Menu

DASHBOARD

[>> Back to Navigation Menu](#)

Dashboard

❖ The Dashboard provides an overview of key information about your portfolio, the stocks on your watchlist and the performance of different global markets.

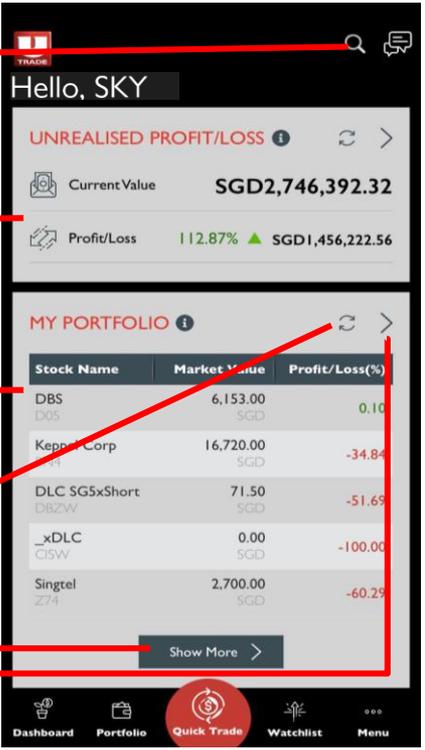
1. **Counter Search**
Intuitive search tool that automatically generates relevant search results when you type.

2. **Unrealised Profit/Loss**
This section shows you a snapshot of the performance of your current portfolio.

3. **My Portfolio**
This section shows you the first 5 stocks in your portfolio.

4. **Refresh button**

5. **Show more details**

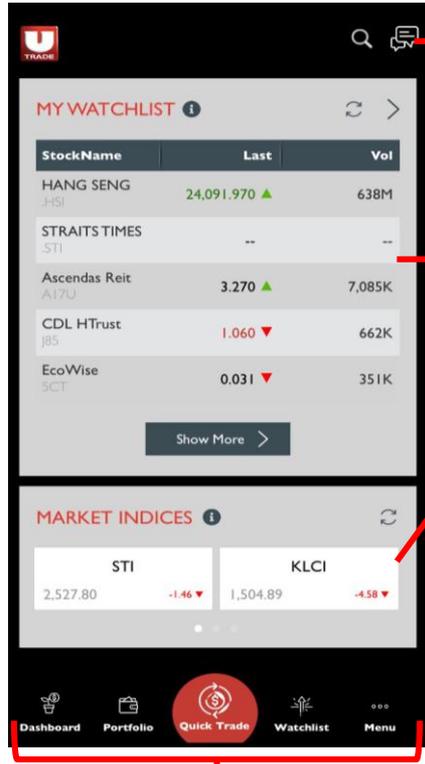


4. **Alert Inbox**
View your latest alerts and notifications here.

5. **My Watchlist**
This section shows you the first 5 stocks in your watchlist.

6. **Market Indices**
This section shows you the key indices of each UTRADE market.

7. **Quick Menu**
A shortcut to quickly access important pages, such as your Dashboard, Portfolio, Watchlist and the Main Menu, from anywhere in the app.



>> Back to Navigation Menu

- ❖ [Quick Menu](#)
- ❖ [Main Menu](#)

MENU

>> [Back to Navigation Menu](#)

Quick Menu

- ❖ A quick access toolbar that is present at the bottom of your app's screen in almost every page of the app. It provides shortcuts to your Dashboard, Unrealised Portfolio, Watchlist and the Main Menu. It also gives you quick access to order placement via Quick Trade.



1. [Dashboard](#)

Provides you with a brief overview of your Portfolio, your Watchlist and Market indices.

2. [Portfolio](#)

View full details of your unrealized portfolio here.

3. [Quick Trade](#)

Click here to place a trade.

4. [Watchlist](#)

View full details of your Watchlist here.

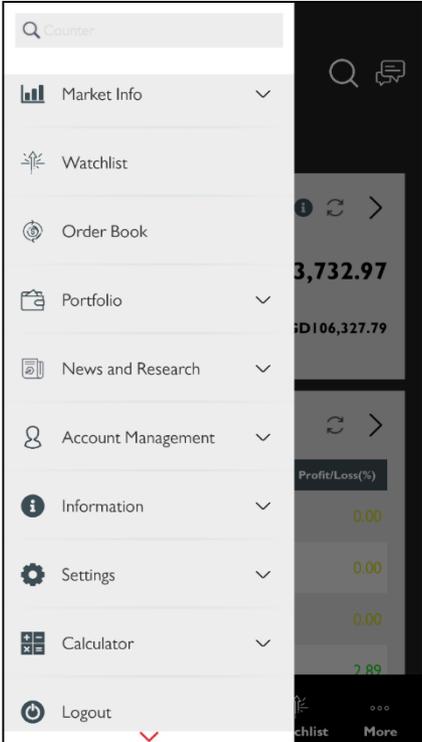
5. [Main Menu](#)

Click here to access the main menu.

>> [Back to Navigation Menu](#)

Main Menu

❖ The Main Menu provides access to all pages in the app (excluding Dashboard and Quick Trade). Access the Main Menu via the Quick Menu.



Main Menu (Click on any of the links below to read more about each section.)

<p><u>Market Info</u></p> <ul style="list-style-type: none"> ❖ Top Movers ❖ Market Indices ❖ Market Summary ❖ ShareXplorer 	<p><u>News and Research</u></p> <ul style="list-style-type: none"> ❖ News (Coming Soon...) ❖ Research (Coming Soon...) 	<p><u>Information</u></p> <ul style="list-style-type: none"> ❖ Announcements ❖ Inbox 	<p><u>Calculator</u></p>
<p><u>Watchlist</u></p>	<p><u>Account Management</u></p>	<p><u>Settings</u></p>	<p>Log out</p>
<p><u>Order Book</u></p>	<ul style="list-style-type: none"> ❖ Trust Balance ❖ Outstanding Position ❖ TR Details ❖ Change User ID ❖ Change Password 	<ul style="list-style-type: none"> ❖ Alert Criteria ❖ Preference ❖ Notifications 	
<p><u>Portfolio</u></p> <ul style="list-style-type: none"> ❖ Custody Holdings ❖ Unrealised P/L ❖ Realised P/L ❖ Add Records ❖ E-Statement 			

>> Back to Navigation Menu

- ❖ [Top Movers](#)
- ❖ [Market Indices](#)
- ❖ [Market Summary](#)
- ❖ [Counter Info](#)
- ❖ [ShareXplorer](#)

MARKET INFO

>> [Back to Navigation Menu](#)

Top Movers

- ❖ View real-time or delayed stock information such as Top 30 Volume, Top 30 Gainers, Top 30 Losers, Top 30 %Gainers, Top 30 %Losers and Top 30 Value stocks by markets.
- ❖ Markets available: SGX, BURSA, HKEX, NYSE, NASDAQ, AMEX, NYSE ARCA, London, Toronto

1. Market Selector

View stocks by markets, i.e. SGX, BURSA, HKEX, NYSE, NASDAQ, AMEX, NYSE ARCA, LONDON and TORONTO.

2. Top Movers Filter

Filter your stock selection by Top Movers, e.g. Top 30 Volume, Top 30 Gainer, Top 30 Loser, Top 30 %Gainer, Top 30 %Loser.

3. Pop-up Menu/ Counter Info

- Tap to go to Counter Info.
- Tap to open pop-up menu - add to watchlist, add an alert, place an order or view information about the stock, i.e. Counter Info, Market Depth, Time & Sales, Trade Summary, Charts.

4. Swipe

Swipe left to view more details.

Stock Name Stock Code	Last Vol	Change %Change
DBS	20.510 ▲	-0.030
D05	2,987K	-0.1
Wilmar Intl	4.200 ▲	0.030
F34	13M	0.7
AEM	3.630 ▼	0.340
AMC	15M	10.3
Sembcorp Marine	0.163 ▼	-0.019
SSI	238M	-10.4
Top Glove	2.580 ▼	0.450
BVA	15M	21.1
UOB	19,400 ▲	0.010
U11	1,744K	0.1
Singtel	2,250 ▲	0.020
Z74	13M	0.9
Medtecs Intl	1,300 ▲	0.050
546	21M	4.0
YZJ Shipbldg SGD	3,270 ▲	0.015
BS6	7,085K	1.6
Ascendas Reit	3,270 ▲	0.000
A17U	7,085K	0.0

5. Alert Inbox

View your latest alerts and notifications here.

6. Column Settings

Click here to rearrange the column view to your preference.

7. Legend

Tells you what the symbols in the remarks column (Rmks) mean.

>> Back to Navigation Menu

Top Movers – Explaining the different colour indicators

Colour Indicators (flashing boxes):

- ❖ The price value (such as last price) flashes:
 - **Green** – When price > previous closing price
 - **Red** – When price < previous closing price
- ❖ Vol flashes:
 - ❖ **Yellow** – Indicates a change in volume
- ❖ Change/%Change flashes:
 - ❖ **Green** – When change is positive
 - ❖ **Red** – When change is negative
- ❖ **Note:** that when there is a change in price and volume concurrently in the Last/Vol column, the indicator will flash based on the change in price.

Stock Name Stock Code	Last Vol	Change %Change
ZOOM VI...COM A	529.1075 ▼	+19.858
ZM.O	5,303K	+3.9
SLEEP N...BER CRP	63,280 ▼	+5.110
SNBR.O	1,208K	+8.8
REPLMUN...RP INC	41.615 ▲	+5.365
REPL.O	2,885K	+14.8
GRAVITY CO LTD	124.500 ▼	+3.830
GRVY.O	29,396	+3.2
TWIST BI...CIENCE	93.150 ▼	+2.950
TWST.O	111K	+3.3
SVB FINANCIAL	272.030 ▼	+4.250
SIVB.O	40,421	+1.6
WATFO...DNG LT	35.090 ▼	+3.080
WTRE.O	1,110K	+9.6
ARROW...PRMTCL	46.775 ▲	+2.315
ARWR.O	1,104K	+5.2
SPI ENERGY CO	9,5401 ▲	+2.360
SPI.O	40M	+32.9
NCINO INC ORD	79.140 ▲	+2.650
NCNO.O	120K	+3.5
ESTRN B...HR ORD	12,350 ▲	+2.350
EBC.O	14M	+23.5
OUTSET...CL ORD	48.510 ▲	+2.450

Legend >>

Dashboard Portfolio Quick Trade Watchlist Menu

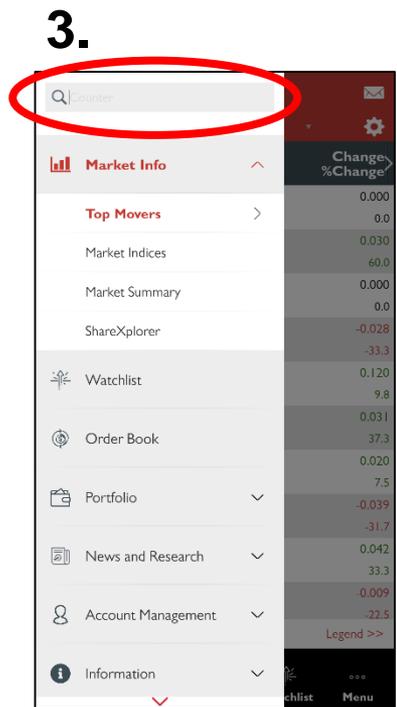
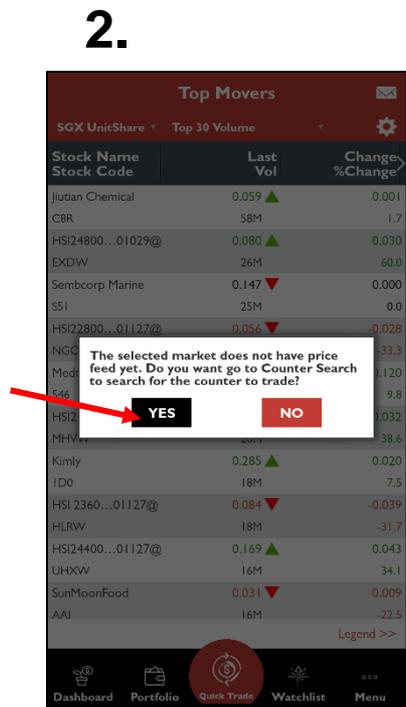
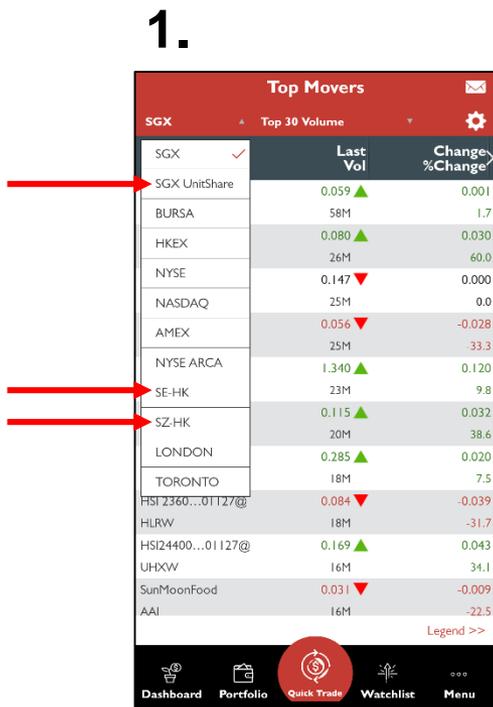
>> Back to Navigation Menu

Counter Search (Method 1)

- ❖ For markets that do not have Top Movers (e.g. SGX UnitShare, SE-HK, SZ-HK), you may search for the counters via the Counter Search tool.
- ❖ You may also use Counter Search to search for any counters from any UTRADE markets.
- ❖ Below outlines 3 methods to access the Counter Search tool.

Method 1 (Via Top Movers)

1. Select one of the markets via the market selector.
2. Click “Yes” when prompted to go to Counter Search.
3. Enter the counter name/ code in the search bar at the top of the Main Menu.

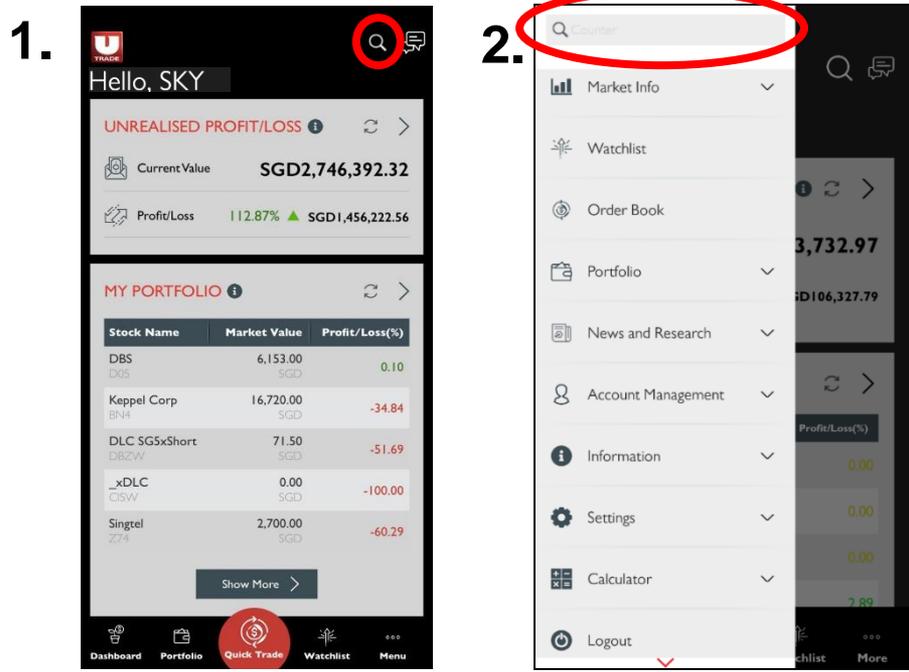


>> Back to Navigation Menu

Counter Search (Method 2 & 3)

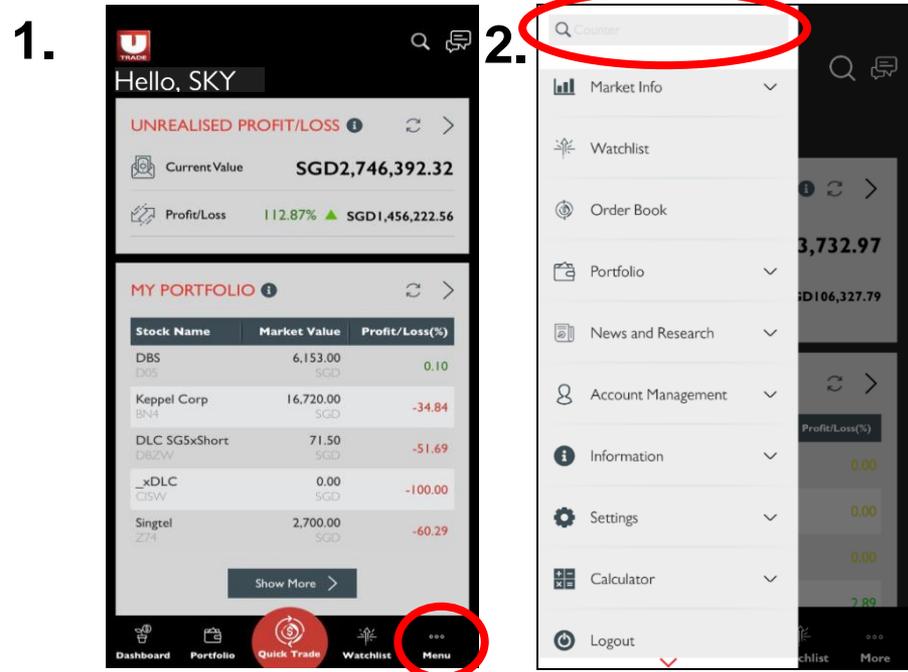
Method 2 (Via Search Tool Icon)

1. Click on the search tool icon at the top right of the dashboard screen to open the search tool.
2. Enter the counter name/ code in the search bar at the top of the Main Menu.



Method 2 (Via Main Menu Icon)

1. Open the Main Menu by tapping on the Main Menu icon at the bottom right of your screen.
2. Enter the counter name/ code in the search bar at the top of the Main Menu.



>> Back to Navigation Menu

Market Indices

- ❖ Track the performance of various market and industry stock indices.
- ❖ Markets available: SGX, HKEX. (BURSA, BURSA FTSE are coming soon.)
- ❖ **Note:** For SGX, the top few rows may be empty. Please scroll down to see the other indices.

1. Market Selector

View stocks by markets, i.e. SGX, BURSA, BURSA FTSE HKEX.

3. Pop-up Menu

Tap on any index to add to your Watchlist or to view more information about the index, i.e. Indices Info, Charts.

2. Swipe

Swipe left to view more details.

Index	Last	Close
FT ST ALL SHARE	634.720 ▲	630.890
FT ST BAS MAT	27.060 ▼	26.700
FT ST CHINA	205.790 ▲	204.360
FT ST CON SERV	402.700 ▼	400.970
FT ST CONS GOODS	429.660 ▲	428.180
FT ST FINANCIAL	845.550 ▲	840.200
FT ST FLEDGLING	665.520 ▼	665.120
FT ST HLTH CARE	998.320 ▲	991.240
FT ST INDUSTRIAL	539.710 ▲	536.400
FT ST MID CAP	664.420 ▲	659.130
FT ST OIL & GAS	313.000 ▲	313.000

3. Alert Inbox

View your latest alerts and notifications here.

4. Column Settings

Click here to rearrange the column view to your preference.

>> Back to Navigation Menu

Market Summary

- ❖ Track the performance of different sectors in the market.
- ❖ Markets available: SGX.

1. Market Selector

View stocks by markets, i.e. SGX, BURSA, HKEX, NYSE, NASDAQ, AMEX, NYSE ARCA, LONDON and TORONTO.

2. Swipe

Swipe left to view more details.

Market Summary		
SGX		
Sector	VolTraded	Value
Agriculture and Fishing	127M	2,821,338.00
Mining and Quarrying	15M	1,417,021.00
Manufacturing	310M	222,646.44K
Electricity, Gas, Steam & Air-Con Supply	11M	13,304,273.00
Water, Sewerage, Waste Mgt & Remediation		199,089.00
Construction	6,440K	557,173.00
Wholesale and Retail Trade	16M	4,943,672.00
Transportation and Storage	20M	13,144,605.00
Accommodation & Food Service Activities	31M	12,673,032.00
Information and Communications	27M	46,486,795.00
Financial and	81M	165,304,44K

3. Alert Inbox

View your latest alerts and notifications here.

4. Column Settings

Click here to rearrange the column view to your preference.

>> Back to Navigation Menu

Counter Info

❖ Counter Info provides in-depth details about the intraday performance of a stock, i.e.

- ✓ Counter Info
- ✓ Market Depth
- ✓ Time & Sales
- ✓ Trade Summary
- ✓ Charts.

❖ You can access Counter Info by using the Counter Search tool or by tapping on any stock counters in your Dashboard, Watchlist, Portfolio or Top Movers.

AWX:SGX

Counter Info Market Depth Time & Sales

AEM (AWX:SGX)

Last	3.630	% Change	10.334
Change	0.340	Volume	15,105,100
Buy	3.630	Buy Vol	1,900
Sell	3.640	Sell Vol	34,300
Day Hi	3.680	Day Lo	3.360
Previous	3.290	Open	3.500
Lot Size	100	Remark	...
Ind	C.M	Value	53,610,799

+ 🏠 Buy Sell

AWX:SGX

Info Market Depth Time & Sales

Bid Vol	Bid	Ask
1,900	3.630	3.640
15,200	3.620	3.650
24,100	3.610	3.660
140K	3.600	3.670
6,000	3.590	3.680
93,200	3.580	3.690
68,100	3.570	3.700
13,900	3.560	3.710
119K	3.550	3.720
60,300	3.540	3.730

+ 🏠 Buy Sell

AWX:SGX

Info Time & Sales Trade Summary

Time	Price	Size
17:13:31	3.630	100
17:13:31	3.630	1,900
17:04:39	3.630	1,000
17:04:39	3.630	100
17:04:39	3.630	10,000
17:04:39	3.630	15,300
17:04:39	3.630	500
17:04:39	3.630	1,700
17:04:39	3.630	1,000

This page shows the latest 50 trades only

+ 🏠 Buy Sell

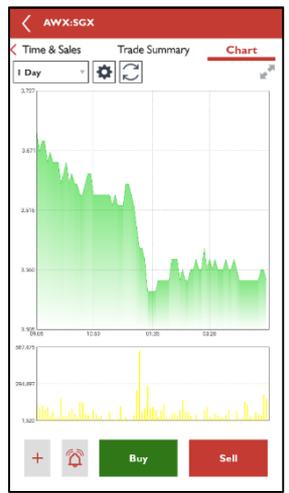
AWX:SGX

Time & Sales Trade Summary Chart

WAP:3.5492 Avg Vol:1,952,572

Price	Trades	VolTraded
3.360	10	45,200
3.370	25	40,600
3.380	91	168K
3.390	81	228K
3.400	80	174K
3.410	96	278K
3.420	221	447K
3.430	235	416K
3.440	106	190K

+ 🏠 Buy Sell



>> Back to Navigation Menu

Counter Info – Counter Info

- ❖ View the latest stock information about the counter, such as the last done price, share price change and percentage, trading volume, etc.
- ❖ **Note:** The type of streaming data (delayed or real-time) that you see for each counter depends on your market subscription.

1. Stock Information

View Information about the stock here.

2. Add Alerts

Add a stock alert here.

3. Add to Watchlist

Add the stock to your Watchlist here.

The screenshot shows the Counter Info page for UOB (U11:SGX). The page has a red header with a back arrow and the text 'U11:SGX'. Below the header are three tabs: 'Counter Info' (selected), 'Market Depth', and 'Time &'. The main content area displays a table of stock information. At the bottom of the page, there are four buttons: a grey '+' button, a grey bell icon, a green 'Buy' button, and a red 'Sell' button. Red arrows point from the numbered instructions to these buttons and the table.

UOB (U11:SGX)			
Last	19.690	% Change	1.234
Change	0.240	Volume	2,203,200
Buy	19.680	Buy Vol	6,800
Sell	19.690	Sell Vol	12,900
Day Hi	19.700	Day Lo	19.410
Previous	19.450	Open	19.410
Lot Size	100	Remark	--
Ind	C,M	Value	43,145,864

4. Buy

Click here to place a Buy order for the stock.

5. Sell

Click here to place a Sell order for the stock.

>> Back to Navigation Menu

Counter Info – Market Depth

- ❖ Gain access to the stock's list of buy and sell orders pending execution, along with their trade sizes via Market Depth.
- ❖ **Note:** Available for SGX/HKEX markets, subject to market depth subscription.

1. Market Depth Data

View the Bid Volume, Bid Price, Ask Price and Ask Volume

2. Swipe

Swipe left to view more details.

3. Add Alerts

Add a stock alert here.

4. Add to Watchlist

Add the stock to your Watchlist here.

Bid Vol	Bid	Ask
7,000	19.680	19.690
12,900	19.670	19.700
10,000	19.660	19.710
5,800	19.650	19.720
1,700	19.640	19.730
5,300	19.610	19.750
5,100	19.600	19.760
6,500	19.590	19.770
6,900	19.580	19.780

5. Trade on Market Depth

Tap on any price or qty on the Market Depth page and be immediately directed to the order placement page.

6. Buy

Click here to place a Buy order for the stock.

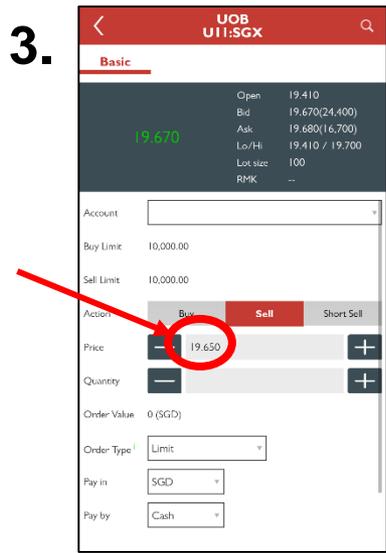
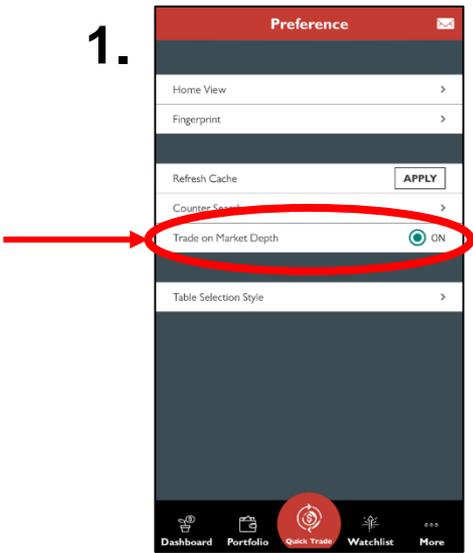
7. Sell

Click here to place a Sell order for the stock.

>> Back to Navigation Menu

How to trade on Market Depth?

- ❖ Place orders via Market Depth.
 1. Under “Preferences, turn “Trade on Market Depth” on.
 2. Tap on any price or quantity in the Market Depth page and you will be immediately directed to the order placement. The price (or price corresponding to the volume chosen) that you have tapped on will be autopopulated to the price field in the order placement page.
- ❖ **Note:** Available for SGX/HKEX markets, subject to market depth subscription.



Counter Info – Time & Sales

- ❖ View the detailed account of daily trading activity for the stock.
- ❖ **Note:** Shows up to 50 trades only.

1. Refresh

Click here to refresh the data.

2. Swipe

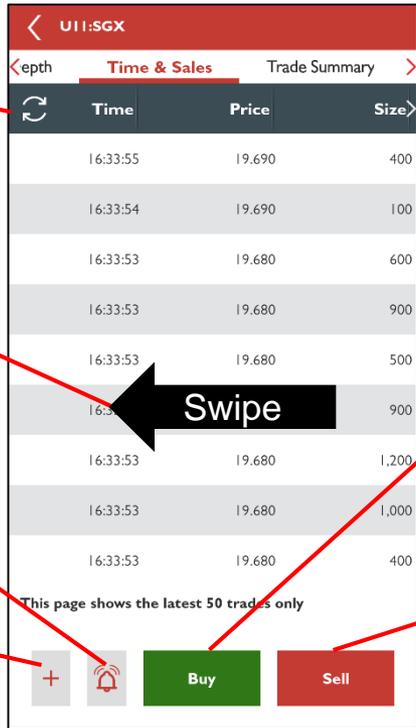
Swipe left to view more details.

3. Add Alerts

Add a stock alert here.

4. Add to Watchlist

Add the stock to your Watchlist here.



5. Time & Sales Data

View the Trade Time, Trade Price, Trade Size and Trade Type here.

6. Buy

Click here to place a Buy order for the stock.

7. Sell

Click here to place a Sell order for the stock.

>> Back to Navigation Menu

Counter Info – Trade Summary

❖ View the consolidated table of trades done for a stock by prices and the number of trades.

1. Refresh

Click here to refresh the data.

2. Swipe

Swipe left to view more details.

3. Add Alerts

Add a stock alert here.

4. Add to Watchlist

Add the stock to your Watchlist here.

Price	Trades	VolTraded
19.410	108	86,700
19.430	2	600
19.440	7	2,500
19.450	63	17,200
19.460	1	5,500
19.470	17	7,700
19.480	75	42,200
19.490	67	33,300
19.500	58	18,800

5. Trade Summary Data

View the Price, Number of Trades, Volume Traded, Volume Sold to Buyer, Volume Bought from Seller and Mid here.

6. Buy

Click here to place a Buy order for the stock.

7. Sell

Click here to place a Sell order for the stock.

>> Back to Navigation Menu

Counter Info – Charts

- ❖ View the stock's price and volume charts in different graph settings.
- ❖ Gain access to various technical analysis tools.

1. Chart Type

Select the type of chart you want to view, i.e. 1 Day, 1 Week, 1 Month, 3 Months, 6 Months, 1 Year, 3 Years.

2. Chart Settings

Change Graph Styles and add Technical Analysis Tools.

3. Pinch to Zoom

Using 2 fingers, move your fingers apart to zoom in and pinch to zoom out.

4. Volume Chart

5. Add Alerts

Add a stock alert here.

6. Add to Watchlist

Add the stock to your Watchlist here.



7. Expand

Click here to expand the chart to full screen.

8. Clear

Click here to clear all analysis tools.

9. Refresh

Click here to refresh the chart data.

10. Price Chart

Tap and hold to activate the cursor and axis indicator.

11. Buy

Click here to place a Buy order for the stock.

12. Sell

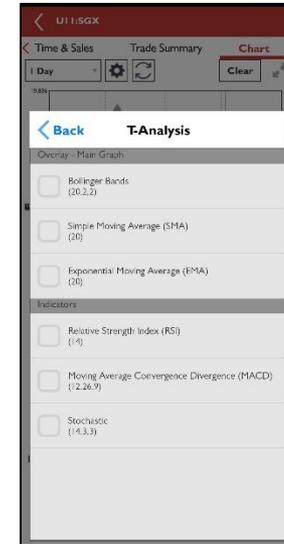
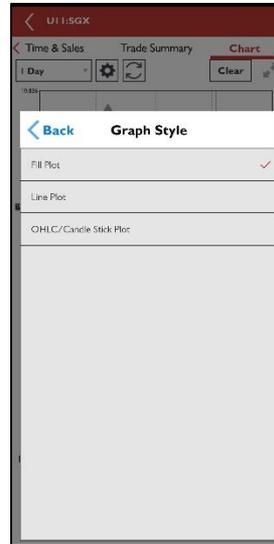
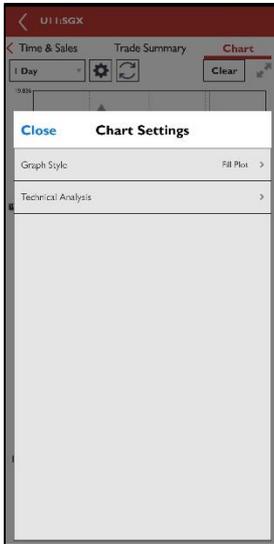
Click here to place a Sell order for the stock.

>> Back to Navigation Menu

Counter Info – Chart Settings

❖ Chart settings allows you to:

- Change **graph styles** – Fill Plot, Line Plot, OHLC/Candle Stick Plot
- Apply **technical analysis** tools
 - **Tools** – Bollinger Bands, Simple Moving Average (SMA), Exponential Moving Average (EMA)
 - **Indicators** – Relative Strength Index (RSI), Moving Average Convergence Divergence (MACD), Stochastic

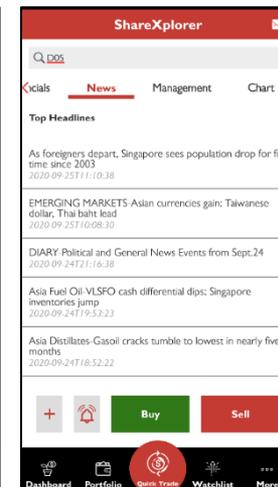
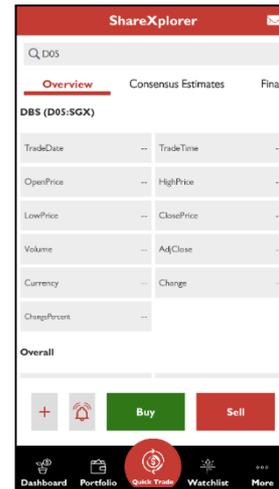


>> Back to Navigation Menu

ShareXplorer

- ❖ ShareXplorer provides information about the fundamentals of the company behind the stock, i.e.
 - ✓ Business Profile
 - ✓ Consensus Estimates
 - ✓ Financials
 - ✓ News (Stock news & details coming soon...)
 - ✓ Management
 - ✓ Charts

- ❖ To access ShareXplorer, open the “Main Menu” and you will be able to find the tab under “Market Info”.



>> Back to Navigation Menu

- ❖ [Watchlist](#)
- ❖ [Watchlist Editor](#)

WATCHLIST

>> [Back to Navigation Menu](#)

Watchlist

- ❖ Build an effective portfolio to track the movement of your favourite stocks and indices.
- ❖ **Note:** You can create up to 6 Watchlists and add up to a maximum of 30 counters each.
- ❖ **Note:** The same Top Movers' colour indicators apply for Watchlist.

1. Watchlist Selector

Switch between different Watchlists.

2. Info button

Check which markets are streaming in real-time and delayed.

3. Counter Info

Tap on any counter to view more information about the stock.

4. Swipe

Swipe left to view more details.

Stock Name Stock Code	Last Vol	Change %Change
ParkwayLife Reit	3,940 ▲	-0.020
C2PU:SGX	1,641K	-0.5
UOB	19,400 ▲	0.010
U11:SGX	1,744K	0.1
STI ETF	2,523 ▲	0.003
ES3:SGX	1,739K	0.1
SPH	1,060 ▲	0.010
T39:SGX	3,800K	1.0
Koppar Corp	4,180 ▼	-0.040
BN4:SGX	3,539K	-0.9
AEM	3,630 ▼	0.340
AWX:SGX	15M	10.3
UOB Kay Hian	1,260	0.000
U10:SGX		0.0
Wilmar Intl	4,200 ▲	0.030
F34:SGX	13M	0.7
DBS	20,510 ▲	-0.030
D05:SGX	2,987K	-0.1
Golden Agri-Res	0,142 ▼	-0.003
ESH:SGX	12M	-2.1

5. Inbox

View your latest alerts and notifications here.

6. Settings

Access the Watchlist Editor and Column Settings.

- **Watchlist Editor** – Add and remove counters and Watchlists, rearrange the order of your stock and rename your Watchlist.
- **Column Settings** – Rearrange the column view to your preference.

7. Quick Add

A shortcut to add stocks to your current Watchlist.

8. Legend

Tells you what the symbols in the remarks column (Rmks) mean.

>> Back to Navigation Menu

Watchlist Editor

❖ Add and delete Watchlists and stocks with Watchlist Editor.

1. Create Watchlist

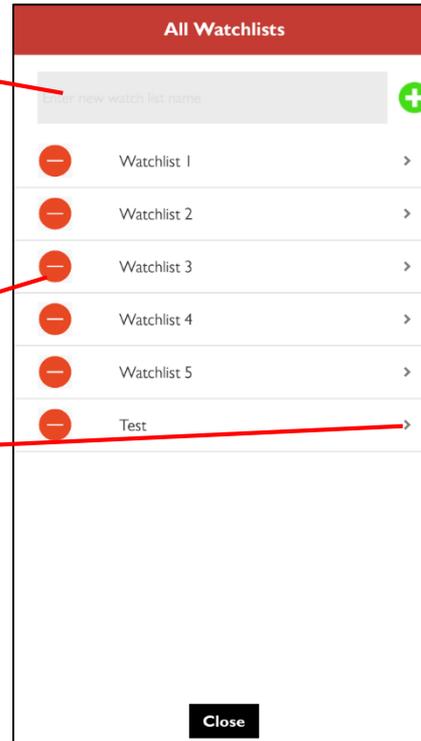
Enter the name of your new Watchlist and click the “+” sign on the right to add. Please note that you can only add up to 6 Watchlists.

2. Remove Watchlist

Click here to remove the selected Watchlist.

3. Edit Watchlist

Click here to edit the counters in your Watchlist.



4. Rename

Rename your Watchlist here.

5. Add Counters

Search and add counters to your Watchlist here. You are allowed to add up to 30 counters per watchlist.

6. Rearrange

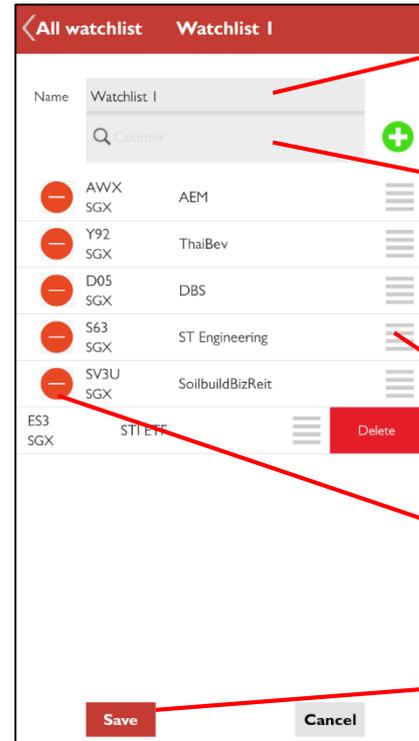
Hold and drag the counters up or down to rearrange its order.

7. Remove Counters

Click here to remove counters from your Watchlist.

8. Save

Remember to save your edits before closing the page. Any unsaved edits will be lost.



>> Back to Navigation Menu

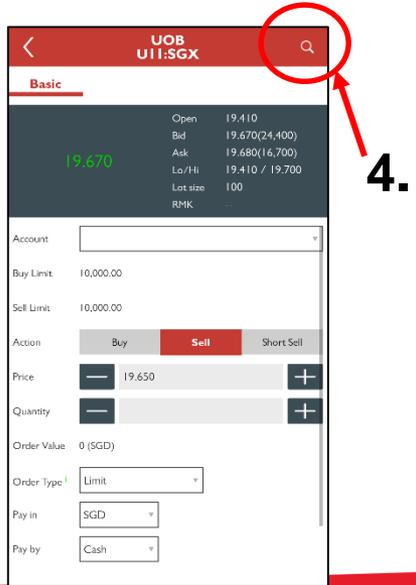
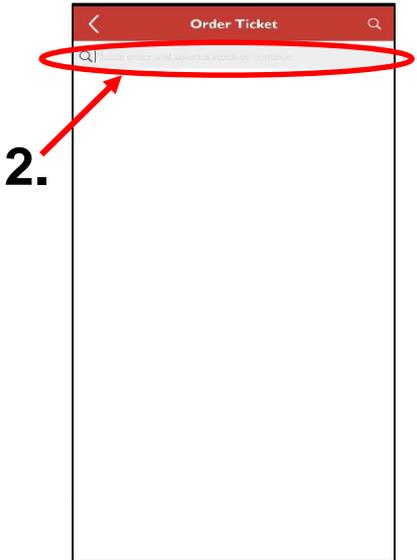
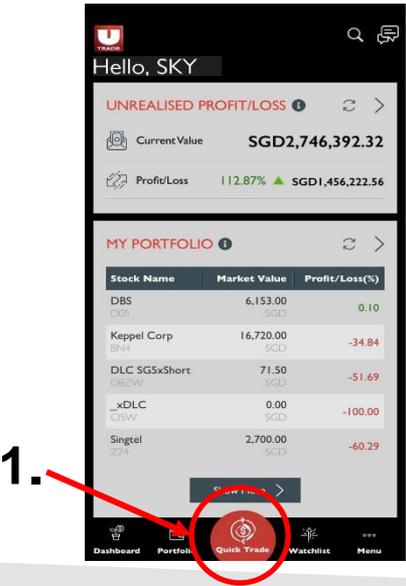
- ❖ [Order Placement](#)
- ❖ [Order Book](#)
- ❖ [Order Details](#)

QUICK TRADE

>> [Back to Navigation Menu](#)

How to use Quick Trade?

- ❖ Quick Trade is a shortcut button located at the bottom-centre of the screen in the Quick Menu toolbar. It gives you quick access to place orders at anytime when you are using the app.
- ❖ How to use Quick Trade?
 1. Tap on the Quick Trade button in the Quick Menu Toolbar to open an Order Ticket.
 2. Search for your desired stock by entering the stock name/stock code in the search bar.
 3. Select the stock to proceed to the order placement page.
 4. If you wish to change stocks, tap on the search icon at the top right corner of the order placement page to search for a new stock.



>> Back to Navigation Menu

Order Placement

- ❖ The order placement page allows you to place basic buy/sell orders, time-in-force orders, conditional orders and stop loss orders.
- ❖ **Note:** Advanced orders will have to be activated in order to view Time-in-force, Conditional orders and Stop Loss options.

1. Order Type

Select the type of order to place for your trade.

2. Counter Info

Readily available counter information to assist you during order placement

3. Input Order Details

Select the account that you wish to trade with and input your order details for submission.

4. Preview

Click "Preview" once you have input your order details to confirm your order.

Basic	Time-in-Force	Conditional	Stop Loss
Open	1.940		
Bid	1.930 (1.093K)		
Ask	1.940 (508K)		
Lo/Hi	1.920 / 1.950		
Lot size	100		
RMK	CD		

Account: [Dropdown]
Buy Limit: 10,000.00
Sell Limit: 10,000.00
Action: **Buy** | Sell | Short Sell
Price: [-] 1.940 [+]
Quantity: [-] 500 [+]
Order Value: 970 (SGD)
Order Type: Limit
Pay in: SGD
Pay by: Cash
[Cancel] [Preview]

ORDER CONFIRMATION

Please confirm your order:

Account	0644263 (Cash Account)	Action	Buy
Counter	C38U:SGX	Name	CapitaMall Trust
Price	1.940	Qty	500
Order Type	Limit	Pay by	Cash
Pay in	SGD	Validity	Day
Order Value	970 (SGD)		

Password: [Masked]

[Cancel] [Submit]

5. Order Confirmation

Check to ensure that your order details are correct.

6. Password

Once you are ready, key in your password.

7. Submit

Click "Submit" to send your order to the exchange.

>> Back to Navigation Menu

Order Book

- ❖ Head over to your Order Book after every trade placed to find out your order status.
- ❖ Tap on any orders to view more order details or to amend/withdraw your trade.

1. Date Filter

Filter to see your orders today or up to 6 days.

2. Advanced Filter

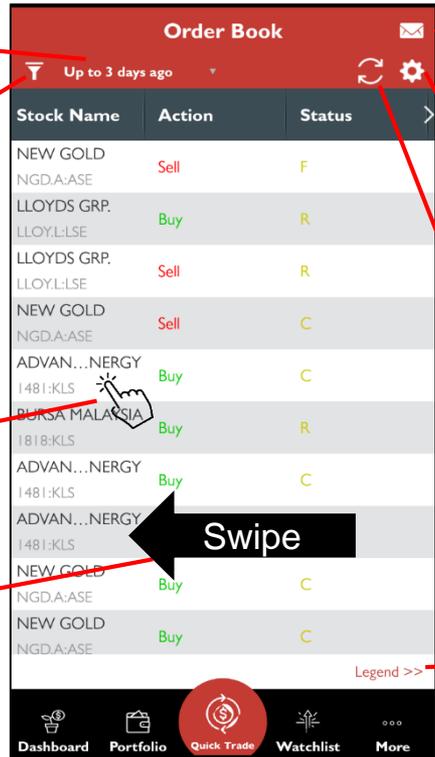
Allows you to filter by Exchange, Account, Order Type and Order Status to get a more specific result.

3. [Order Details](#)

Tap on any orders to view your order details.

4. Swipe

Swipe left to view more details.



5. [Inbox](#)

View your latest alerts and notifications here.

6. Column Settings

Click here to rearrange the column view to your preference.

7. Refresh

Refresh to see your latest orders.

8. Legend

Tells you what the symbols in order status, order type, validity, fill type and counterparty mean.

>> Back to Navigation Menu

Order Details

- ❖ Shows you all the important information pertaining to your trade and the stock traded.
- ❖ Use the page to view order information, find out order status, amend/withdraw the order, place another order on the same stock, view the stock's counter information (including market depth, time & sales, trade summary and charts), add it to your watchlist and/or add a stock alert for it.

1. Swipe

Switch tabs to view details about your order and the counter.

2. Order Status

3. Order Details

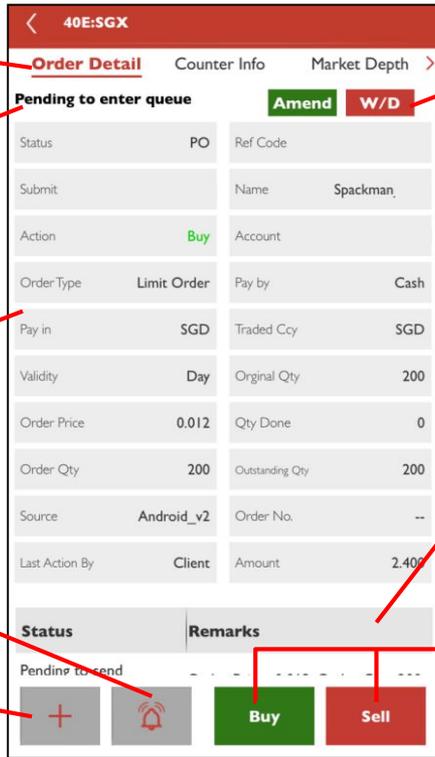
View and check your order details here.

4. Add Stock Alerts

Tap to add stock alerts.

5. Add to Watchlist

Tap to the stock to your Watchlist.



6. Amend/Withdraw

Select either of these buttons to amend or withdraw your orders.

7. Order Activities

Tap here to view more details about your order.

8. Buy/Sell

Click here to place a buy/sell order.

>> Back to Navigation Menu

- ❖ [Custody Holdings](#)
- ❖ [Unrealised P/L](#)
- ❖ [Realised P/L](#)
- ❖ [Add Records](#)
- ❖ [E-Statement](#)

PORTFOLIO

>> [Back to Navigation Menu](#)

Custody Holdings

❖ Use the Custody Holdings page to view the amount of shares you have for each stock, to place new orders for the same stock and to view the stock's counter information.

1. Account Filter

Filter your holdings by account.

2. Market Filter

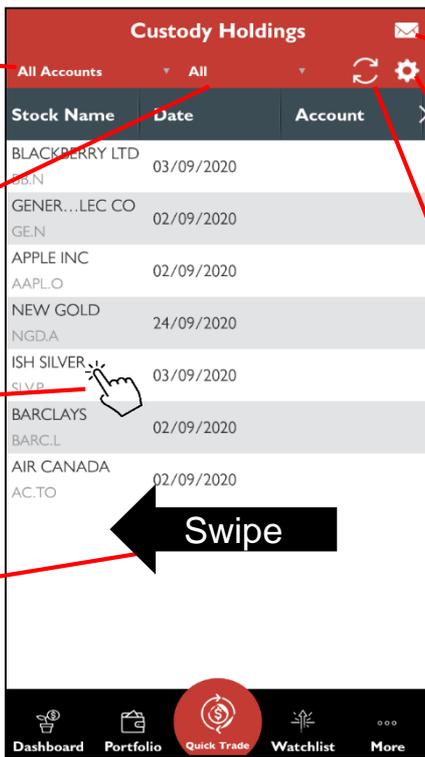
Filter your holdings by markets.

3. Counter Info

Tap on any counter to view more information about the stock.

4. Swipe

Swipe left to view more details.



5. Inbox

View your latest alerts and notifications here.

6. Column Settings

Click here to rearrange the column view to your preference.

7. Refresh

Click here to refresh your holdings.

>> Back to Navigation Menu

Unrealised P/L

❖ The Unrealised P/L is an indicative tool which reflects your trades done with UOB Kay Hian and your manual updates, if any.

1. Account Filter

Filter your holdings by account.

2. Market Filter

Filter your holdings by markets.

3. Counter Info

Tap on any counter to view more information about the stock.

4. Swipe

Swipe left to view more details.

Stock Name Stock Code	Market Value Amount (\$)	Avg Cost	Last
SGX (Cash)			
DairyFarm USD	1,945.00	3.890	
D01	1,945.00	3.8900	
GLD US\$	7,200.00	160.000	
O87	7,200.00	160.0000	
Nomura Yen 1k	1,000.00	2.000	
N33	1,000.00	2.0000	
DBS	449.74K	20.350	
D95	437,100.01	19.7783	
AEM	2,330.00	2.330	
AWX	3,930.00	3.9300	
CSE Global	100,000.00	100.000	
544	505.00	0.5050	
Genting Sing		0.680	
G13		0.7200	
SPH	2,240.00	1.120	
T39	2,080.00	1.0400	
Total	1,000.00		
Total	1,000.00		
Total	554.98K		

5. Inbox

View your latest alerts and notifications here.

6. Column Settings

Click here to rearrange the column view to your preference.

7. Refresh

Click here to refresh your portfolio.

>> Back to Navigation Menu

Realised P/L

- ❖ The Realised P/L is an indicative tool which reflects your trades done with UOB Kay Hian and your manual updates, if any.

1. Account Filter

Filter your holdings by account.

2. Market Filter

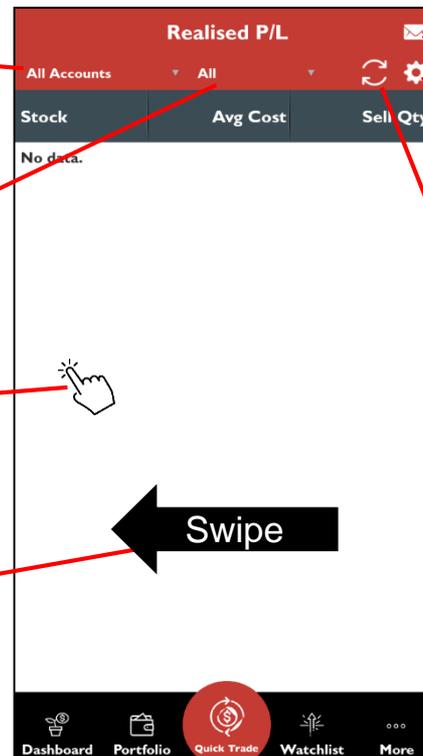
Filter your holdings by markets.

3. Counter Info

Tap on any counter to view more information about the stock.

4. Swipe

Swipe left to view more details.



5. Inbox

View your latest alerts and notifications here.

6. Column Settings

Click here to rearrange the column view to your preference.

7. Refresh

Click here to refresh your portfolio.

>> Back to Navigation Menu

Add Records to Your Portfolio

- ❖ The Add Records tool allows you to manually add in any missing contracts to your Portfolio.
- ❖ **Note:** The function to delete records is currently unavailable. Please use the UTRADE Web platform if you wish to manually delete any records from your portfolio.

1. Contract Details

Fill in your contract details to add to your portfolio.

2. Add

Remember to click the "Add" button before leaving the page.

The screenshot shows the 'Add Records' screen in a mobile application. The title bar is red with the text 'Add Records' and a mail icon. The form contains the following elements: 'Account' dropdown set to '(Cash Account)'; 'Action *' with 'Bought' (green) and 'Sold' (grey) buttons; 'Stock *' text input with a search icon; 'Price' and 'Quantity *' each with a minus and plus button; 'Total' text input; 'Mode' dropdown set to 'Cash'; 'Date' text input set to '15/10/2020'; and 'Contract No.' text input. At the bottom of the form are 'Add' (green) and 'Clear' (black) buttons. Below the form is a navigation bar with icons for 'Dashboard', 'Portfolio', 'Quick Trade' (which is highlighted with a red circle), 'Watchlist', and 'Menu'.

3. Inbox

View your latest alerts and notifications here.

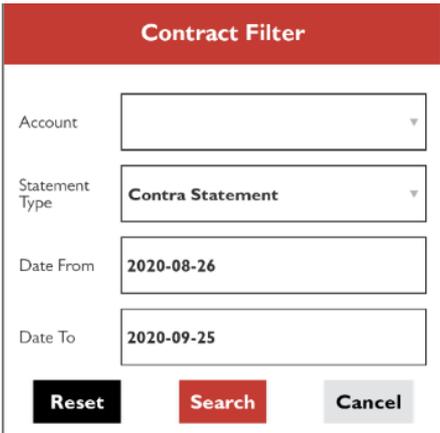
>> Back to Navigation Menu

E-Statements

- ❖ View your Monthly Statement (up to 3 months), Contra statement and Contract statement.
- ❖ **Note:** You will see “No data” upon landing on the E-Statement page. Please use the filter to search for your contracts. Your contracts will appear after using the search filter.

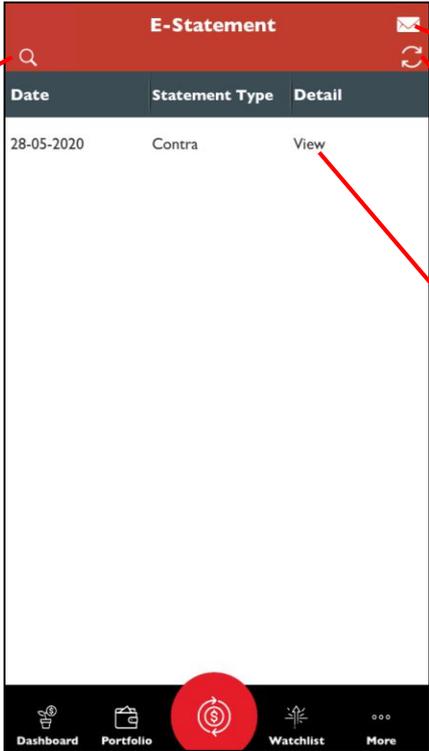
1. Filter

Filter your statements by account, statement type and Date Range.



The 'Contract Filter' form includes the following fields and buttons:

- Account: [Dropdown menu]
- Statement Type: **Contra Statement** [Dropdown menu]
- Date From: **2020-08-26** [Text input]
- Date To: **2020-09-25** [Text input]
- Buttons: **Reset**, **Search**, **Cancel**



2. [Inbox](#)

View your latest alerts and notifications here.

3. Refresh

Click here to refresh the page.

4. View

Click here to view your statements in PDF.

>> [Back to Navigation Menu](#)

- ❖ **News (Coming Soon...)**
- ❖ **Research (Coming Soon...)**

NEWS & RESEARCH

>> Back to Navigation Menu

- ❖ [Trust Balance](#)
- ❖ [Outstanding Position](#)
- ❖ [TR Details](#)
- ❖ [Change User ID](#)
- ❖ [Change Password](#)

ACCOUNT MANAGEMENT

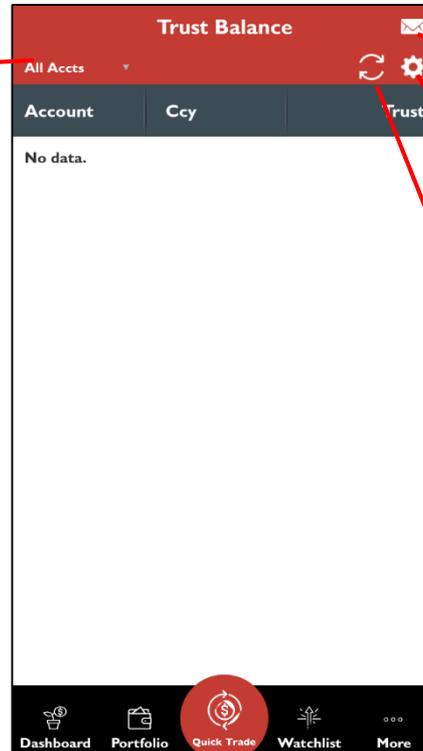
>> [Back to Navigation Menu](#)

Trust Balance

❖ View your account balance here.

1. Account Filter

Filter your trust balance details by account.



2. [Inbox](#)

View your latest alerts and notifications here.

3. Column Settings

Click here to rearrange the column view to your preference.

4. Refresh

Click here to refresh your portfolio.

>> [Back to Navigation Menu](#)

Outstanding Position

❖ View your outstanding positions here.

1. Account Filter

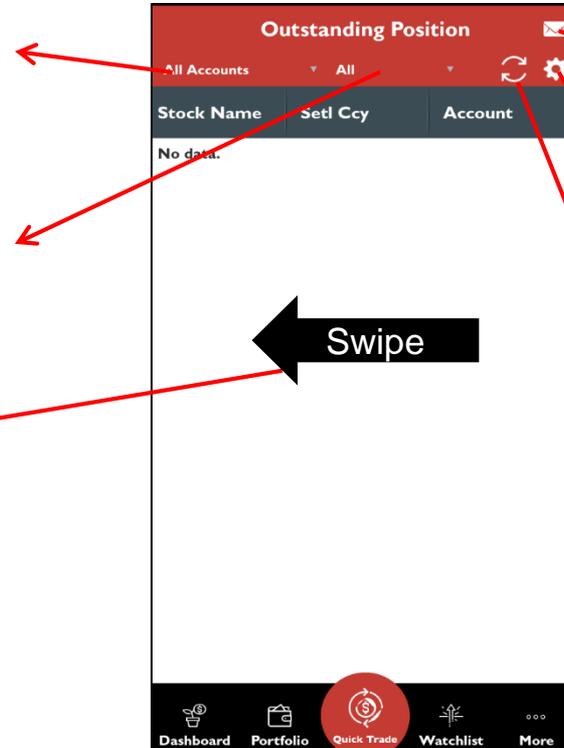
Filter your contracts by account.

2. Market Filter

Filter your contracts by market.

3. Swipe

Swipe left to view more details.



4. [Inbox](#)

View your latest alerts and notifications here.

5. Column Settings

Click here to rearrange the column view to your preference.

6. Refresh

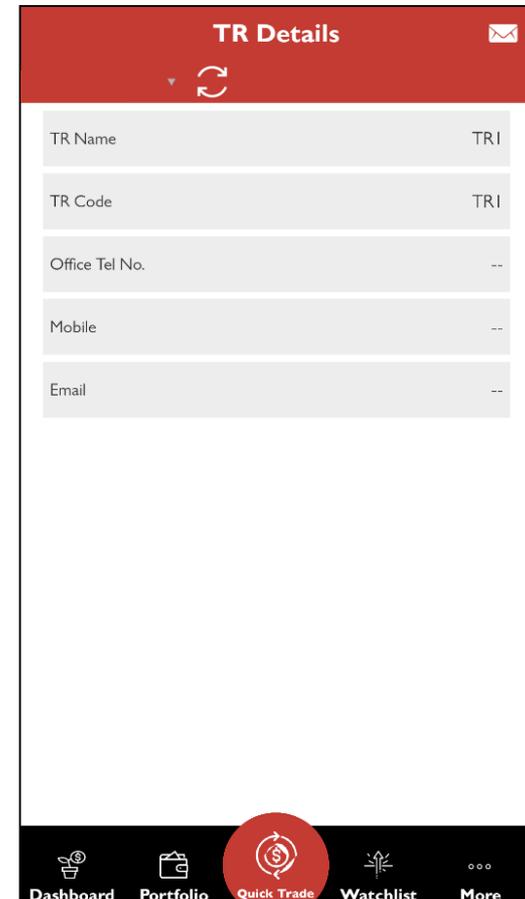
Click here to refresh your portfolio.

>> Back to Navigation Menu

TR Details

❖ View your Trading Representative's (TR) details here, i.e.

- ✓ TR Name
- ✓ TR Code
- ✓ Office Number
- ✓ Mobile Number
- ✓ Email



>> [Back to Navigation Menu](#)

Change User ID

Please take note of the following before changing your User ID:

1. User ID must be in alphanumeric characters.
2. User ID must be between 5 and 25 characters long.

Change User ID

Please fill up following information to update your user id:

Enter New User ID

Re-enter New User ID

Enter Password

Update

Dashboard **Portfolio** **Quick Trade** **Watchlist** **More**

>> [Back to Navigation Menu](#)

Change Password

Please take note of the following before changing your Password:

1. Password is case-sensitive.
2. Password must be in alphanumeric characters.
3. Password must be between 6 and 12 characters long.
4. You will be prompted to change your password every 300 days.

Change Password

Please fill up following information to update your password:

Current Password

New Password

Confirm New Password

Update

Dashboard Portfolio **Quick Trade** Watchlist More

>> [Back to Navigation Menu](#)

❖ [Announcements](#)

❖ [Inbox](#)

INFORMATION

>> [Back to Navigation Menu](#)

Announcements

The Announcement page allows you to:

- ❖ View important notices about platform updates and related information, security alerts, exchange rates and other exchange information.

Announcements

GENERAL
There is no announcement at the moment.

1) Notice

- a. [Important Notice \(Please Read\)](#)
- b. [Security Alert!](#)
- c. [Exchange Rates](#)
- d. [Accessing UTRADE with Supported Browser and Mobile App](#)
- e. [Issue with Email ChartGenie Alerts](#)

2) Trading Related

- a. [Non-Trading Days 2020](#)
- b. [Trading Restrictions \(Please Read\)](#)
- c. [List of Tradeable US Stocks for Online Trading \(with current market capitalisation greater than US\\$1billion\)](#)
- d. [Selling of shares after Corporate Action Events^{NEW!}](#)
- e. [Corporate Action for US market^{NEW!}](#)
- f. [Corporate Action for SG market^{NEW!}](#)
- g. [E-Notice on Voluntary Corporate Action](#)

3) Tools & Features

- a. [UTRADE Token^{NEW!}](#)
- b. [Email Notification prior to Redemption Expiration^{NEW!}](#)
- c. [UTRADE New 'Account Details' Tab](#)
- d. [Additional Details on UTRADE Custody Holdings Page](#)

Dashboard Portfolio **Quick Trade** Watchlist Menu

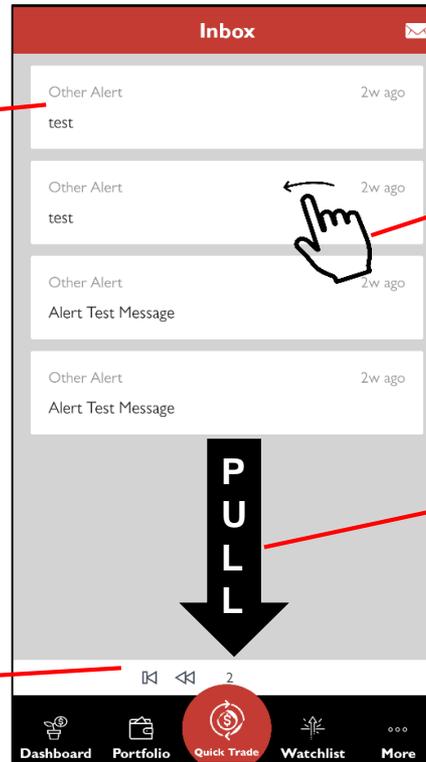
>> Back to Navigation Menu

Alert Inbox

❖ View all your trade alerts, stock alerts and other alerts here.

1. Mail

Click on the mail to view full message/alert details. Your push notifications will be saved here.



3. Swipe left

Swipe left on any mail to delete.

4. Refresh

Pull the page down to refresh.

2. Pages

Click ">>" to view older alerts/messages on the next page.

>> Back to Navigation Menu

- ❖ [Alert Criteria](#)
- ❖ [Preference](#)
- ❖ [Notifications](#)

SETTINGS

>> [Back to Navigation Menu](#)

Alert Criteria

- ❖ Set and edit your stock alerts here.
- ❖ The push notification will be triggered when your criteria has been met.

1. Stock Search

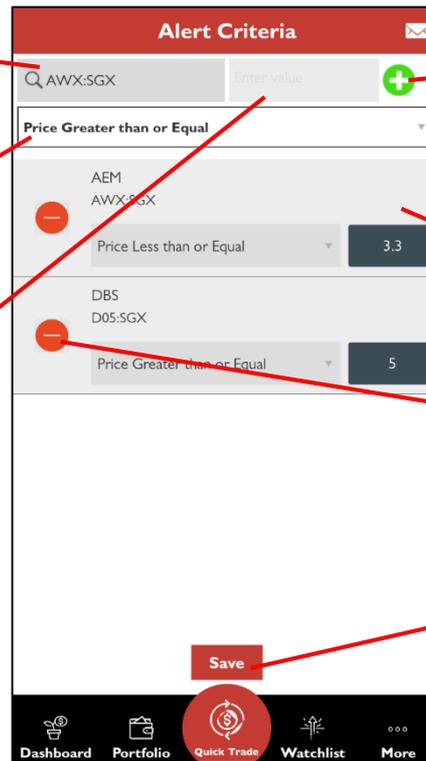
Search for your desired stock here.

2. Criteria

Select the criteria to set for your stock alert.

3. Enter Price

Enter the price for the alert to be triggered.



4. Add

Click the “+” sign to add the alert.

5. Alert

Shows you the details of the stock alert you have set.

6. Remove

Click here to remove the Alert.

7. Save

Always save after every edit. Any unsaved edits will be lost.

>> [Back to Navigation Menu](#)

Preference

❖ Allows you to set and edit different app behaviours, enable/disable biometric login function, clear app cache and activate trading on market depth.

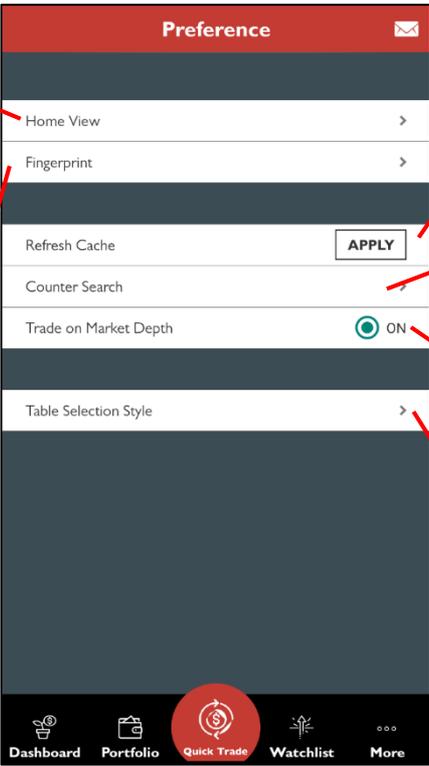
1. Home View

Allows you to change the default first page to land on after login.

Dashboard	✓
Market Info	
Watchlist	
Order Book	
Portfolio	
News and Research	
Account Management	
Information	
Calculator	

2. Face/ Touch ID

Allows you to enable or disable biometric login.



3. Refresh Cache

Click “Apply” to refresh the App’s cache when needed.

4. Counter Search

Allows you to select the page to land on after performing a counter search, i.e. Order Placement or Counter Info.

5. Trade on Market Depth

Go straight to the order placement page from Market Depth when you activate this option.

6. Table Selection Style

Choose whether you want to go directly to the counter info page or open the pop-up menu when clicking on stocks in various tables.

Open popup menu	✓
Go to counter info panel	

>> Back to Navigation Menu

Notifications

Notifications allow you to register or deregister for the push notification service.

Please ensure that your device's "Settings" allows the app to send you push notifications as well.



>> [Back to Navigation Menu](#)

❖ **The stock calculator works out the brokerage rate and fees for each of your trade.**

CALCULATOR

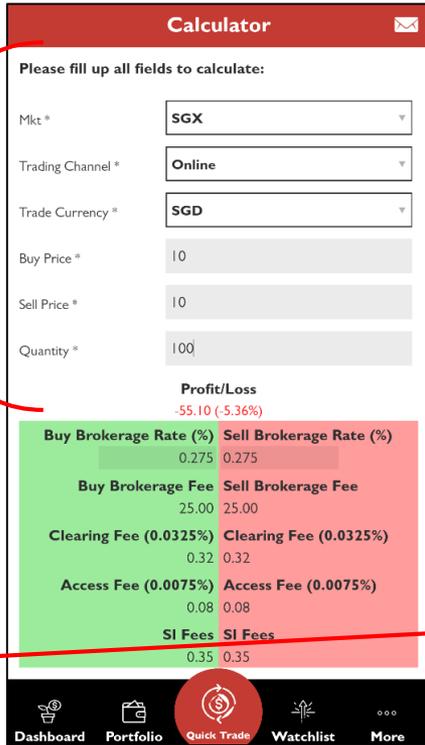
[>> Back to Navigation Menu](#)

Calculator

- ❖ Calculate the trade value and fees for each trade.
- ❖ View the next +/- 5 bids.

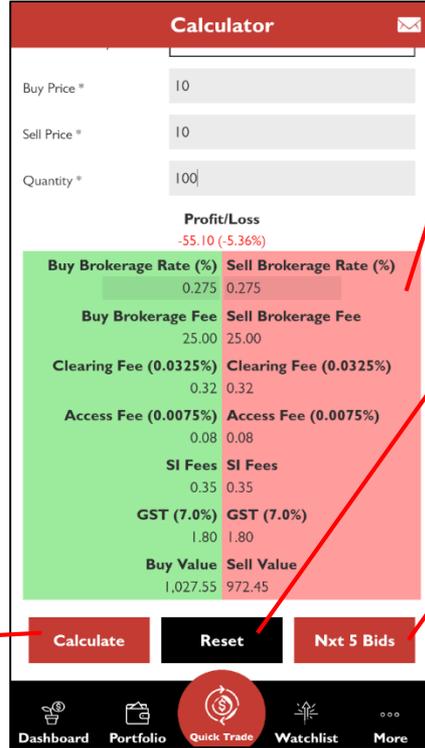
1. Input Values

Choose your market and input your buy/sell price and quantity.



2. Calculate

Tap on "Calculate" to generate the results.



3. Results

Your generated results will be shown here.

4. Reset

Always click "Reset" before generating another set of results to ensure accuracy.

5. Next 5 bids

Click here to view the next 5 bids.

>> Back to Navigation Menu

UTRADE SG version 2.0

Download now on Google Play or the App Store.



UOB Kay Hian Pte Ltd
8 Anthony Road, #01-01, Singapore 229957
Mon to Fri - 8:30am to 5:30pm
[\(65\) 6536 9338](tel:6565369338)
contact@ustrade.com.sg