New UTRADE

USER GUIDE

Web Trading Platform







KEY FEATURES





Clean and Modern Interface

Designed with clean, organised widget-like pages to help you get to where you want quickly.



Interactive Dashboard

View key account information such as your portfolio, watchlist, unsettled transactions and account balance in one glance.



A Workspace to Call Your Own

Customise your very own ideal workspace with the widgets you want to suit your trading style.



News at your fingertips

Get timely updates and news alerts from our News and Economic Calendar widgets on latest business news and events around the world.





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GETTING STARTED

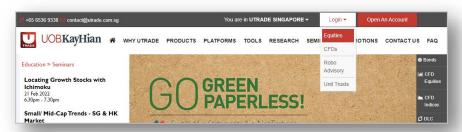


Once your account has been opened, you will receive your Login ID and Password details via email. To login, proceed to www.utrade.com.sg.





Locate the "Login" button at the top of the page and select "Equities" under its dropdown.





Next, enter your given UTRADE Login ID and Password. Click "Login" to enter the platform.







You will be asked if you would like to set up 2FA authentication. Click on "Continue to login" if you do not wish to do so.





RETRIEVING YOUR LOGIN CREDENTIALS

Forgot your Login ID or Password?

To retrieve your Login ID and Password, on the Equities Login Page and select:

- I. Forgot Password
- II. Forgot Login ID

III. Unlock Account

 Unlock account allows you to unlock your account if you remember your existing password but have accidentally locked your account due to multiple failed login attempts. Please note that you will only be able to use this function once.

Log in Login ID Password SGX English 中文 By logging in, you accept the Ter Forgot Password Forgot Login ID Unlock Account FAQ Security Advisory

Note:

Online requests for a new UTRADE Login ID or Password can only be made if you have an existing account with us with a valid email address in our records. If you suspect that your registered email address may not be accurate, you may update it by contacting our Client Services Helpdesk at +65 6536 9338 or submitting the Update Particulars Form to contact@utrade.com.sg.





SETTING UP

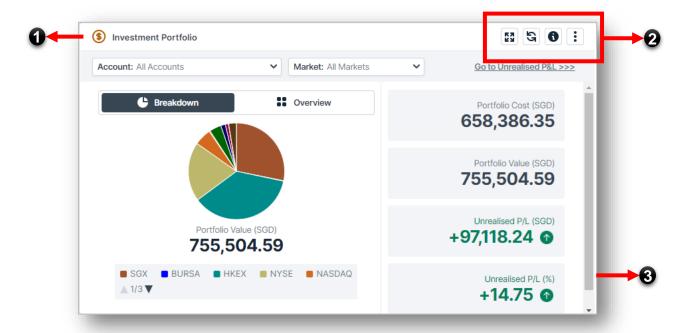
Your Account For The First Time

- 1. For new UTRADE clients, you will be prompted to change your password upon entering the UTRADE platform for the first time.
- Next, there will be various Terms & Conditions for you to read and accept, most of which will only appear once upon your first login. The "Terms of Use of UTRADE portfolio" however, will appear each time you login.
- Complete a one-time acceptance of the Exchange Agreement for each market to gain access to the price feed. To do that, you may go to the "Account" page. Select "Account Details" and follow the instructions under the "My acceptance of Exchange Agreement" column to accept.
- To get SGX Market Depth or live prices for US or HKEX Trading, you may:
 - I. Use your reward points to subscribe for these services under the "Rewards" page.
 - II. Pay for these services and complete the <u>Subscription Services</u> Form.





WIDGETS



Throughout the UTRADE Web Platform, you will see cards like the one above. These are called widgets.

These widgets all have a few similar characteristics, namely:

- 1. Name of the Widget
- 2. Widget Action Buttons, including
 - o **Refresh** Allows you to refresh the data within the widget.
 - o **Maximize** Allows you to maximize the size of the widget.
 - Export Allows you to export the data within the widget.
 - o **Print** Allows you to print out the data within the widget.
 - Other buttons that are related to the widget itself and will be explained later.
- 3. For widgets in pop-up windows and in My Workspace, you can adjust the size of the widget by pulling the sides of the widgets.



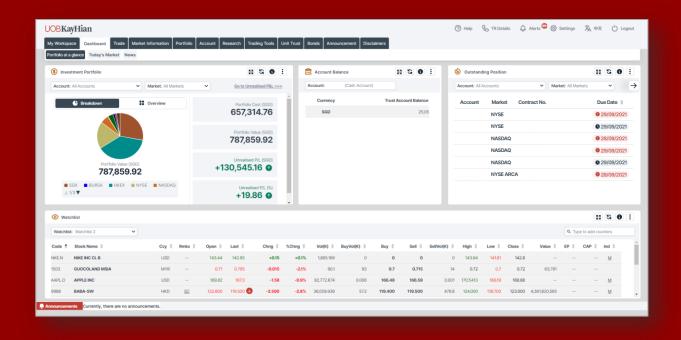


DASHBOARD

The dashboard is the default first page that you will see upon entering the platform. It allows you to view key pieces of information about your account at a glance.

Information such as:

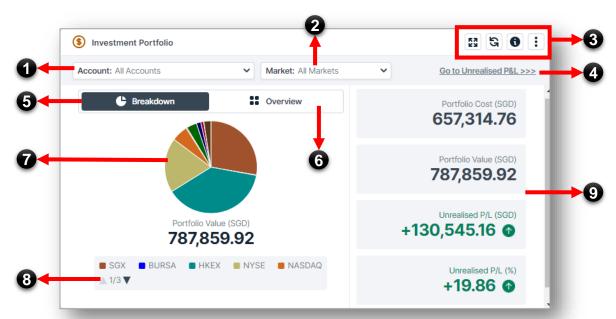
- o A pie chart breakdown of your Investment Equity Portfolio
- Account Balance
- Unsettled Transactions
- Watchlist
- Market Indices
- Stock Data
- Market News







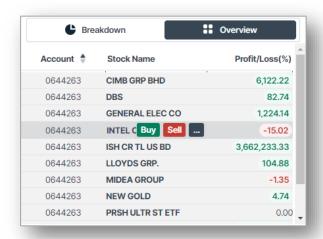
Portfolio At A Glance – Investment Portfolio



- Account Filter
 Filter your portfolio by account.
- 2. Market Filter
 Filter your portfolio by market.
- 3. Widget Action Buttons
 Click here to maximise the widget, refresh the data or view more information about this page.
- 4. Unrealised P&L Click here to go to Unrealised P/L.
- Pie Chart Breakdown
 Click here to view a pie chart breakdown of your investment portfolio.

6. Table Breakdown

Click here to view a table breakdown of your portfolio. Hover over any stock to view additional shortcut buttons.







Portfolio At A Glance - Investment Portfolio

7. Pie Chart Breakdown by Market and Stock

- Hover over any section for more details about your portfolio by market.
- ii. By clicking on any section of the pie chart on the left, you will be able to view a further breakdown of your portfolio by stock.
- iii. Click back to return to the previous pie chart.

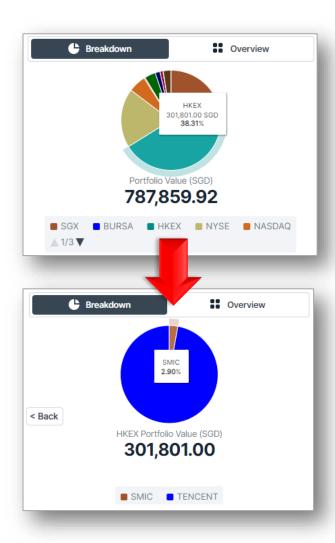
8. Legend

Tells you what the colour of each section of the pie chart represents.

Click on the view more.

9. Portfolio Overview

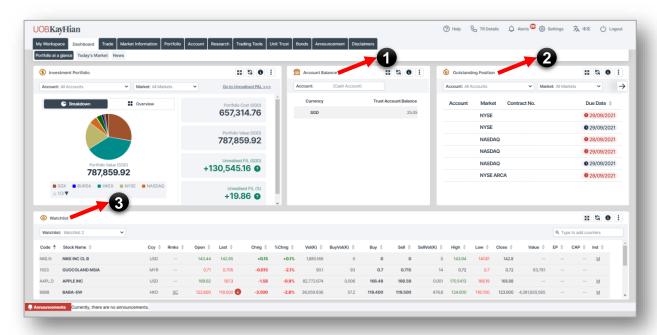
Shows you a quick overview of your investment portfolio, including details such as your Actual Portfolio Amount (SGD), Portfolio Market Value (SGD), Portfolio Gain/Loss Amount (SGD), Portfolio Gain/Loss (%).







Portfolio At A Glance – Account Balance | Unsettled Transactions | Watchlist



1. Account Balance

View your trust account balance by account and by currency here.

2. Unsettled Transactions

View your unsettled transactions here. Filter by account and market. Click on the → button at the top right corner of the widget to view more filter options.

3. Watchlist

View your watchlist here. Choose the watchlist that you want to appear in your dashboard.

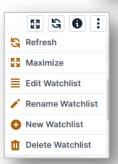


3. Watchlist

Hover over any stock to view additional shortcut buttons.



Add stocks to your selected watchlist. Q Type to add counters

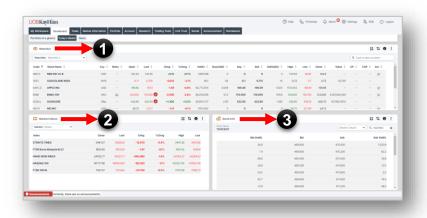


Click on the button to edit, rename, add new and delete your watchlist.





Today's Market | News



1. Watchlist

View your watchlist here.

2. Market Indices

View market indices here. Filter by market: Global, SGX, BURSA FTSE, BURSA Sectorial, HKEX.

3. Stock Info

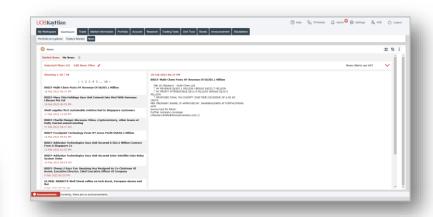
Search for stock specific information here such as Market Depth, Trade Summary and Time & Sales information.

4. News

View global market news here. Filter by Market and Industry.

Turn on News Alerts under My News.









MY WORKSPACE

Customising A Workspace Of Your Own

My Workspace allows you to customise your very own trading page to suit your trading style.

You can create up to 3 different workspace pages.

Available widgets that can be added:

MARKET INFORMATION

Quotes & Watchlist Market Indices Bonds (by BondbloX)

STOCK INFO

Stock Info Broker Queue

CHARTING

Intraday Chart

TRADE

My Orders
Place Order
Batch Order

PORTFOLIO

Investment Portfolio Portfolio

ALERTS

Alert Mailbox Set Stock Alerts

INFORMATION

Announcements Disclaimers

ACCOUNT

Account Management Account Activities Rewards Daily Margin Updates E-Statement

TOOLS

Calculator

RESEARCH

Economic Calendar News Research

TRADING TOOLS

ShareXplorer StockScreener US ETF Screener TechAnalyzer ChartGenie

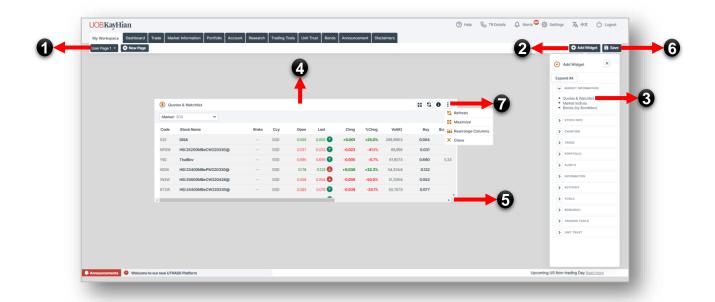
UNIT TRUST

Unit Trust





HOW TO CUSTOMISE YOUR WORKSPACE?

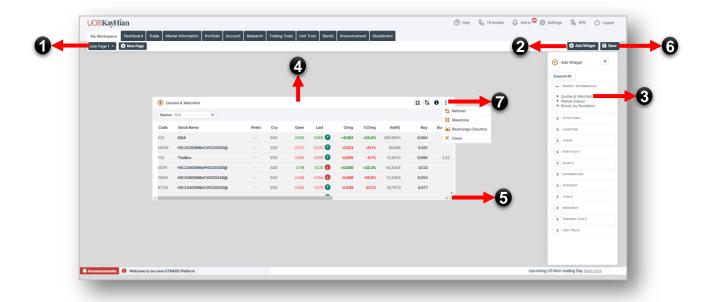


- Select or create a new workspace page. If you want to rename your page, click on the down arrow beside the page name.
- 2. Click on "Add Widget".
- 3. Select the widgets that you want to add to the page by clicking on them.
- Click on the white space at the top of the widget and hold to drag it to where you want.





HOW TO CUSTOMISE YOUR WORKSPACE?



- 5. You can resize the widget by clicking the edges of the widget and dragging it to the size that you want.
- 6. Once you are done with the page setup, click on the Save button. If you do not click this button, your setup will not be saved.
- 7. To remove the widget, click on the widget action button at the top right corner of the widget and a close button will appear. Click on "Close" to remove the widget.





TRADE

Equity Trading

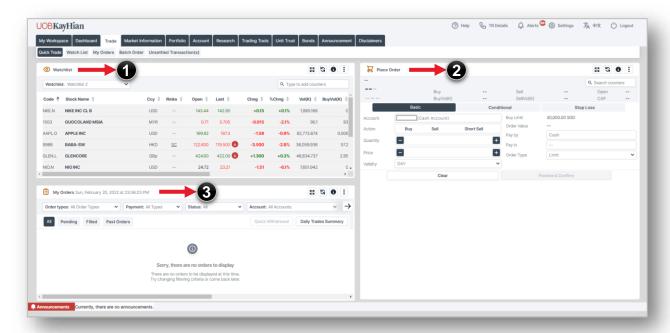
- Quick Trade
- Watchlist
- My Orders
- Batch Order
- Unsettled Transaction(s)







QUICK TRADE



Quick Trade provides you with all the tools to place your your desired orders quickly.

1. Watchlist

View your watchlist here. You may also click on any stock here and it will automatically show under the place order screen.

2. Place Order

Fill in your order details in the fields provided to place an order here.

3. My Orders

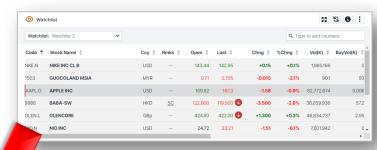
- i. View the status of your orders here. Filter your orders by order type, payment mode, trading account, market and stock.
- ii. Amend and Withdraw orders here.
- iii. Get daily trade summaries.
- iv. View and export your past order history.



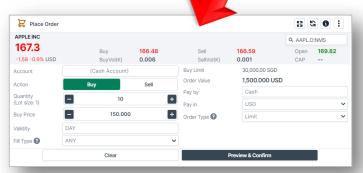


HOW TO USE QUICK TRADE?

In the Watchlist widget, click on any stock that you want to trade in and it will appear in the Place Order widget.



2



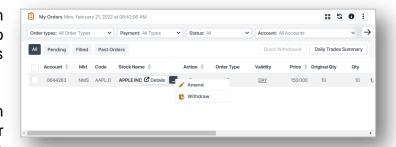
Next, in the Place Order Widget, select the Account, Action and Order Type you want, and fill in the rest of the order details in the fields provided.

In the Place Order widget, you may also search for the stock you want by entering the stock name/code at the search box located at the top right corner of the widget.

Q Search counters

Once your order has been placed, you will be able to see it in the My Orders widget.

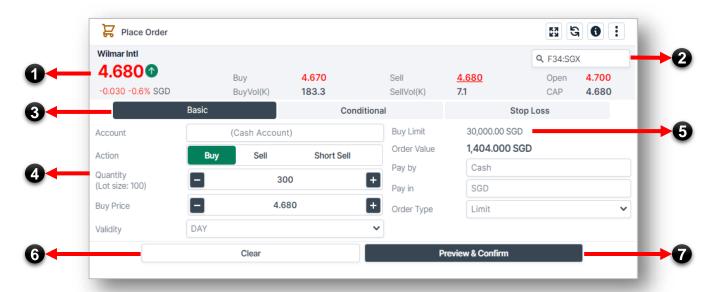
In this widget, you can amend or withdraw your order, or click on the Details button to view the details about the order.







ORDER PLACEMENT



The Place Order Widget allows you to place basic limit orders, conditional orders and stop loss orders.

NOTE: For SGX market, advanced order options may have to be activated in order for you to view conditional and stop loss order types.

1. Counter Information

Readily available counter information to assist you during order placement.

2. Counter Search

Search for any stock you want by entering the stock name/code.

Order Type

Choose the type of order to place for your trade.

4. Input Order Details

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

5. Limit & Order Value

View your available limit here. The order value will also be calculated based on your input of order details.

6. Clear

Click "Clear" to clear your inputs.

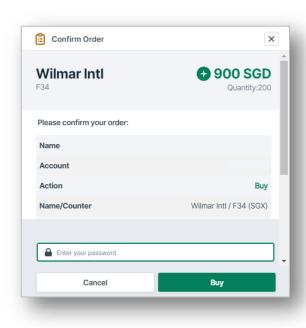
7. Preview & Confirm

Click "Preview & Confirm" once you are done to confirm your order.





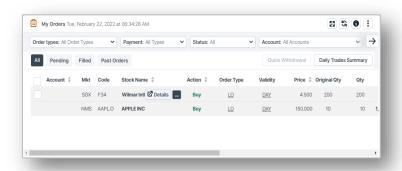
ORDER CONFIRMATION



- Once you have clicked on "Preview & Confirm", a "Confirm Order" window will appear. Check your order details here to ensure that it is accurate.
- Next, key in your password in the field provided. Autofill password options may appear here if you have any saved passwords in your browser.
- Finally, click the Action button

 "Buy" to submit your order. The Action button varies according to your selection in the Place Order widget.

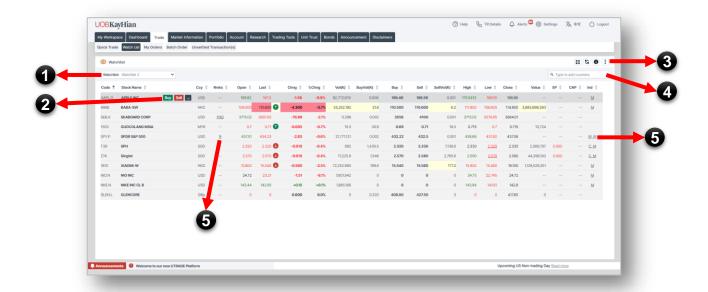
To view your submitted order and its status, go to the My Orders widget in the Trade Page or My Orders Pages. You can also amend or withdraw your order here.







WATCH LIST



Build an effective portfolio to track the movement of your favourite stocks and indices with the Watchlist widget. It allows you to create up to 6 Watchlist and add up to 30 stocks for each watchlist.

1. Watchlist Selector

Click here to switch between watchlists.

2. Shortcut Buttons

Hover over any stock to view additional shortcut buttons such as Buy, Sell, Intraday Chart, Broker Queue, Market Depth, Trade Summary, Time & Sales, Interactive Chart, ShareXplorer, Calculator, Add to Watchlist, Remove from Watchlist, Add to Batch Order and Set Stock Alert.

3. Widget Action Buttons

Click here to refresh your watchlist data or to edit, rename, add new or delete your watchlist.

4. Add to Watchlist

Search for stocks here to add to your watchlist.

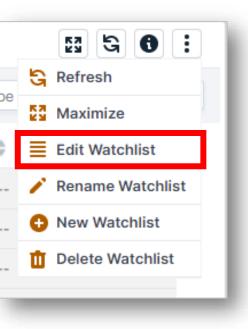
5. Legend

Open the legend by clicking on the underlined text to find out what the abbreviated words mean.

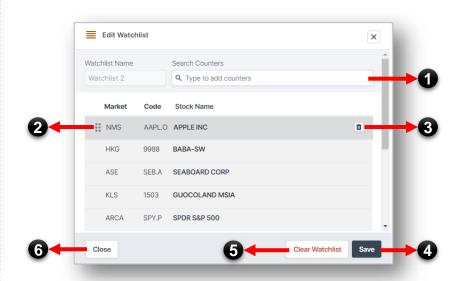




EDITING YOUR WATCHLIST



1. Edit Watchlist



To edit your watchlist, go to the watchlist that you want to edit in the watchlist widget. Click on the "Edit Watchlist" action button to open the "Edit Watchlist" window.

1. Search Counters

Search for counters by stock name/code to add to your selected watchlist.

2. Rearrange

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

3. Remove Counters

Click here to remove counters from your watchlist.

4. Save

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

5. Clear Watchlist

Click here to clear your entire watchlist.

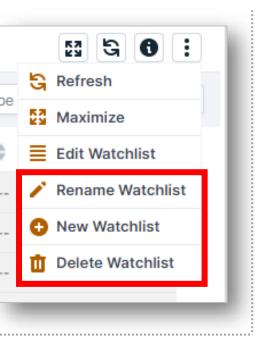
6. Close

Click here to close the window.



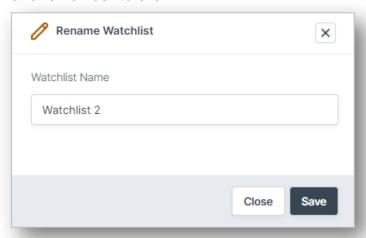


EDITING YOUR WATCHLIST



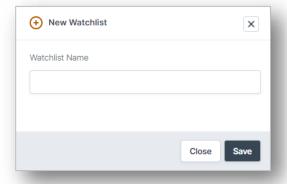
1. Rename Watchlist

To rename your watchlist, click on the "Rename Watchlist" action button. Edit the Watchlist Name and remember to click "Save".



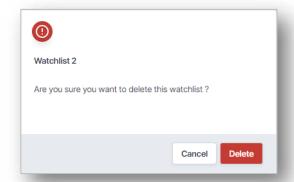
2. New Watchlist

To add a new watchlist, click on the "New Watchlist" action button. Enter the Watchlist Name and remember to click "Save".



3. Delete Watchlist

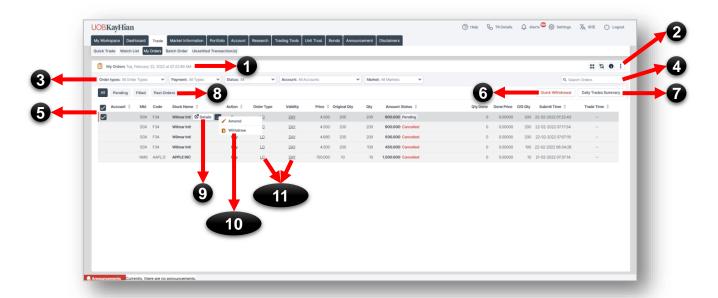
To delete a watchlist, simply click on the "Delete Watchlist" action button to delete.







MY ORDERS



My Orders allows you to view your order's status, more details about your order, amend and withdraw orders, retrieve daily trade summaries, as well as view and export past order history.

Date/Time

Shows you that the data has been refreshed as of the reflected date/time.

2. Widget Action Buttons

Click here to refresh, maximise or export your order data.

3. Filters

Filter the order book by order type, payment mode, order status, account and market.

4. Filter by Stock

Filter the order book by stock name/code.

5. Check Box

Select up to 10 orders for quick withdrawal here.

6. Quick Withdrawal

Click on the "Quick Withdrawal" button after selecting orders to withdraw.





MY ORDERS

Order Details

7. Daily Trade Summary

Shows you a summary of the day's trade.

Click on Details for the list of trades for the counter.

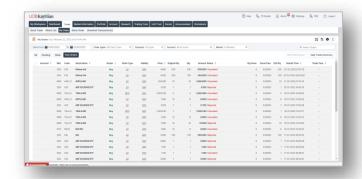
Right click on the stock name for more options.



8. Past Orders

Click here to view your past orders. Filter by date range, order type, payment mode, trading account, market and stock name/code.

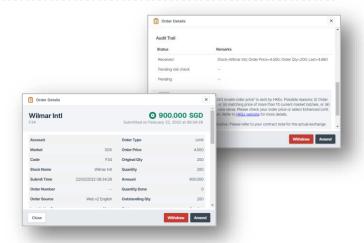
To export the list of past orders, click on the button at the top right corner of the widget to find the export button.



9. Details

Hover over any order to view the Details button. By clicking on the Details button, you will find more information about your order in the Order Details window.

In this window, you will be able to track the audit trail of your order, view the rejection reason for your order, and withdraw or amend your order.







MY ORDERS

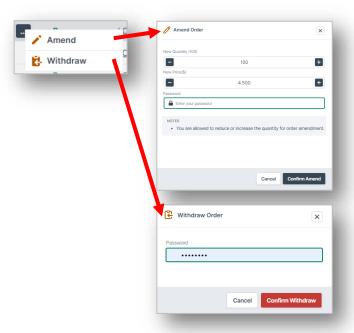
Order Amendment And Withdrawal

10. Amend/Withdraw

Hover over any order to view additional buttons.

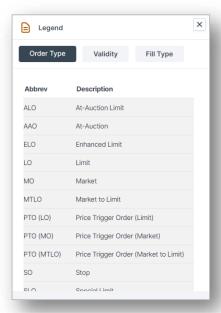
By clicking on ..., the Amend and Withdraw button will appear. Click on either buttons to amend or withdraw your order.

The password field may be auto filled if your password is saved in your browser.



11. Legend

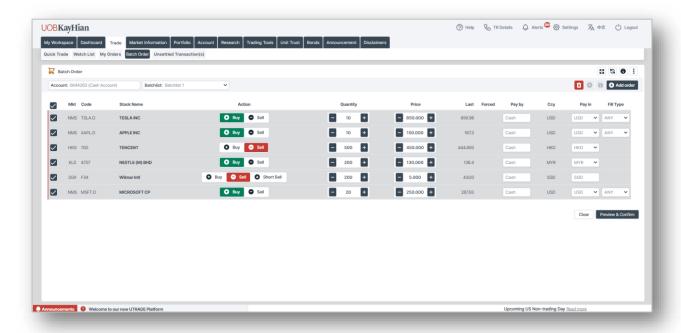
Open the legend by clicking on the underlined text to find out what the abbreviated words mean.







BATCH ORDER



Batch order allows you to place multiple orders (up to 6 orders) at a time.

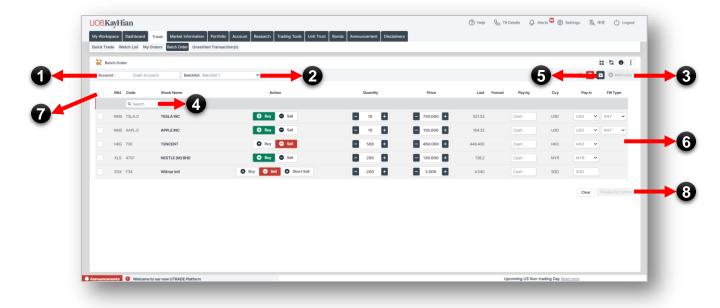
You can create up to 10 sets of batch orders and save them for future use.

Do note however that the values you have entered in the provided fields will not be saved once you log out.





HOW TO USE BATCH ORDER?



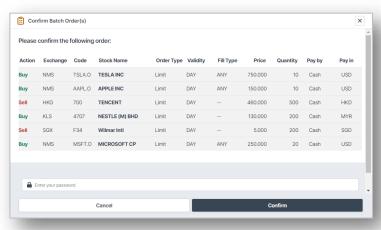
- 1. Select the account to trade with.
- 2. Choose the batchlist that you want to work with.
- 3. Click "Add Order" to add orders to the batchlist.
- 4. Search for your desired counter.
- 5. Click the save button. Repeat steps 1-5 to add in more orders.
- 6. Fill in the order details in the fields provided.
- Select the orders that you want to send by checking the boxes beside it.

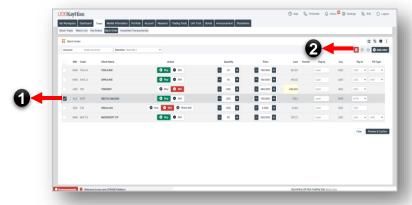




HOW TO USE BATCH ORDER?

- Click "Preview and Confirm".
 An order confirmation window will appear.
- Enter your password and click "Confirm" to send your batch order.



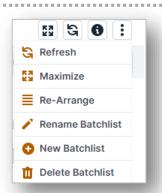


To Delete Order from Batchlist

- Select the orders you want to delete.
- Click on the delete button (red button with bin icon) to delete the order from your batchlist.

To Rearrange, Rename, Add New, Delete Batchlist

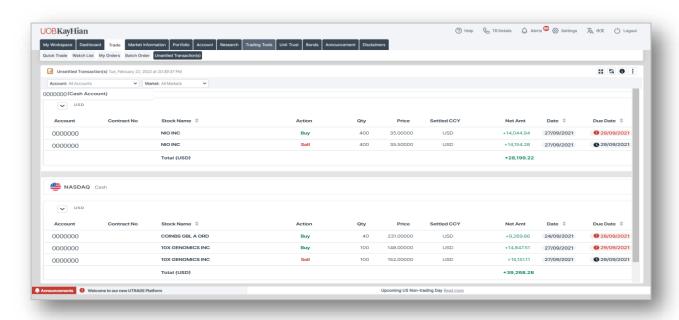
To rearrange, rename, add new or delete your Batchlist, simply open the widget's action buttons at the top right corner of the widget and click on the button of your choice to perform your desired action.







UNSETTLED TRANSACTIONS



Unsettled transactions allows you to view your outstanding positions by trading account and market.

If you see an asterisk (*) symbol, it means that your contract is due and you are strongly advise to make payment immediately. You may ignore it if payment has already been made.

Please note that shares not settled after the due date will be force-sold.

The exchange rate quoted is indicative. Please refer to your contract note under e-statements for the exact amount.

If you wish to use your sales proceeds to settle your outstanding buy contract(s), please instruct your Trading Representatives at least one day before the sale contract(s) are due.





MARKET INFORMATION

- Top Value
- Top Gainer
- Top Loser
- Top Gainer%
- o Top Loser%
- Top Volume
- o Prices
- Market Indices

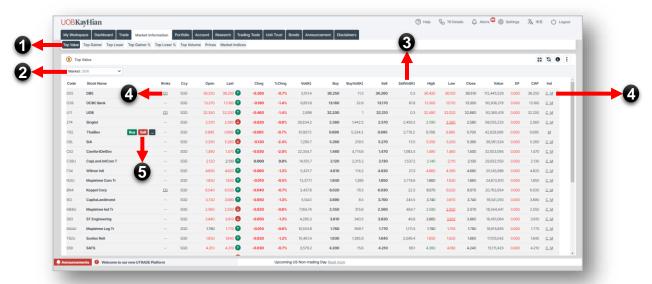






TOP MOVERS

Top Value | Top Gainer | Top Loser | Top Gainer% | Top Loser% | Top Volume



View real-time or delayed market information such as Top Value, Top Gainer, Top Loser, Top Gainer%, Top Loser%, Top Volume by Market.

Markets: SGX, BURSA, HKEX, Hong Kong Stock Connect (SEHK, SZHK) NYSE, NASDAQ, AMEX, NYSE ARCA, London, Toronto

1. Top Movers

Toggle between Top Value, Top Gainer, Top Loser, Top Gainer%, Top Loser% and Top Volume Pages.

2. Market Selector

View stocks by markets.

3. Rearrange Columns

Click and drag the table headers left or right to rearrange the columns.

4. Legend

Open the legend by clicking on the underlined text to find out what the abbreviated words mean.

5. Shortcut Buttons

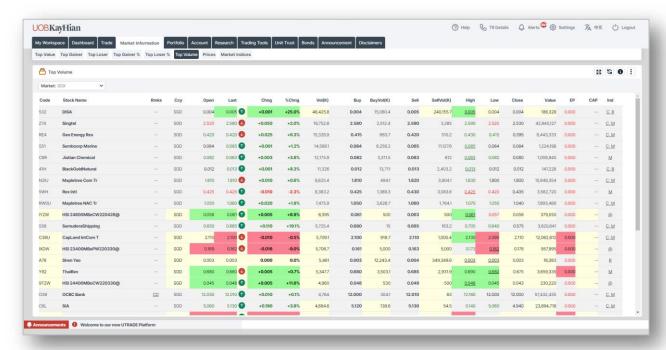
Hover over any stock to view additional shortcut buttons such as Buy, Sell, Intraday Chart, Broker Queue, Market Trade Depth, Summary, Sales. Time & Chart, ShareXplorer, Interactive Calculator, Add to Watchlist, Add to Batch Order and Set Stock Alert.





TOP MOVERS

Explaining The Different Colour Indicators



Colour Indicators (Flashing Boxes)

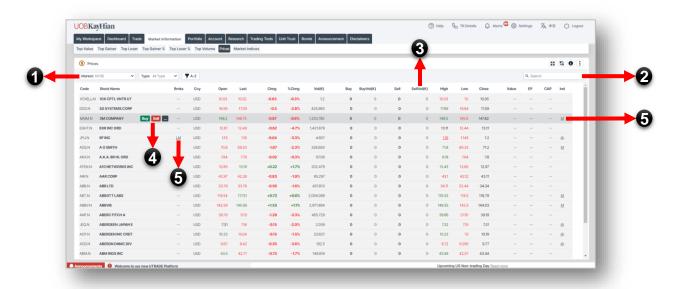
- The price value (such as last price) flashes:
 - Green When price > previous closing price
 - Red When price < previous closing price
- 2. Volume flashes:
 - Yellow Indicates a change in volume
- 3. Change / %Change flashes:
 - Green When change is positive
 - Red When change is negative





PRICES

All Stocks And Markets from A-Z



View real-time or delayed market information such as Top Value, Top Gainer, Top Loser, Top Gainer%, Top Loser%, Top Volume by Market.

Markets: SGX, BURSA, HKEX, Hong Kong Stock Connect (SEHK, SZHK) NYSE, NASDAQ, AMEX, NYSE ARCA, London, Toronto

1. Filters

Filter prices by market, counter type (All, Stock Only, Warrant Only, DLC Only) and stock name alphabetical search (A-Z).

2. Counter Search

Enter stock name/code here to search for counters.

3. Rearrange Columns

Click and drag the table headers left or right to rearrange the columns.

4. Shortcut Buttons

Hover over any stock to view additional shortcut buttons such as Buy, Sell, Intraday Chart, Broker Queue, Market Depth, Trade Summary, Time & Sales, Interactive Chart, ShareXplorer, Calculator, Add to Watchlist, Add to Batch Order and Set Stock Alert.

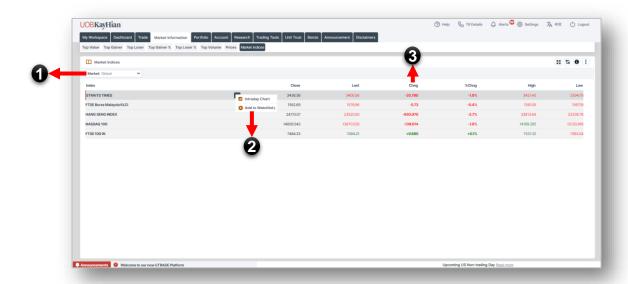
5. Legend

Open the legend by clicking on the underlined text to find out what the abbreviated words mean.





MARKET INDICES



Track the performance of various market and industry stock indices.

Indices Available: Key Global Indices, SGX Indices, BURSA FTSE, BURSA Sectorial, HKEX

1. Market Selector

View indices by market.

2. Shortcut Buttons

Hover over any index to view additional shortcut buttons such as Intraday Chart and Add to Watchlist.

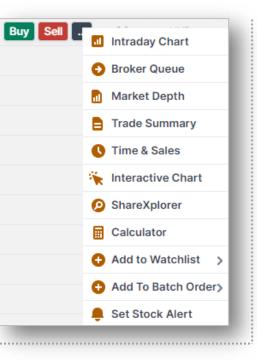
3. Rearrange Columns

Click and drag the table headers left or right to rearrange the columns.



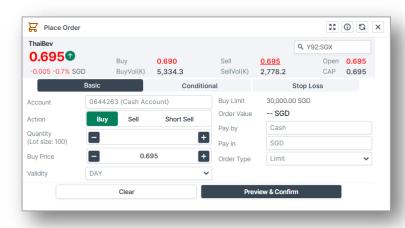


SHORTCUT BUTTONS



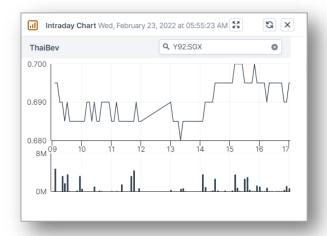
1. Buy/Sell

Click on the Buy/Sell button to open the Place Order page for the stock.



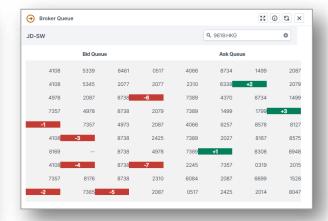
2. Intraday Chart

Click here to open the Intraday Chart for the stock.



3. Broker Queue

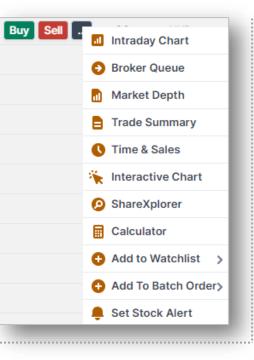
Click here to open the Broker Queue for the stock.





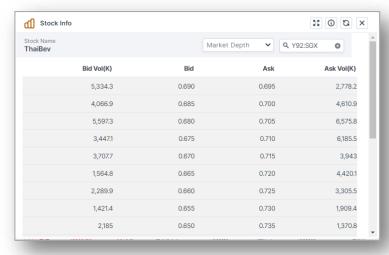


SHORTCUT BUTTONS



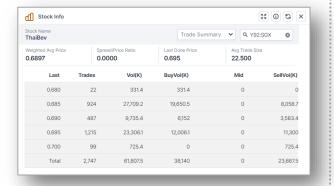
4. Stock Info - Market Depth

Click here to open the market depth information for the stock.



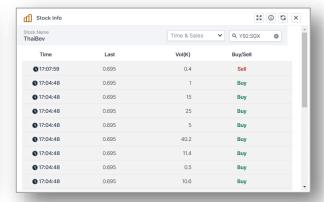
5. Stock Info– Trade Summary

Click here to open the trade summary data for the stock.



6. Stock Info– Time & Sales

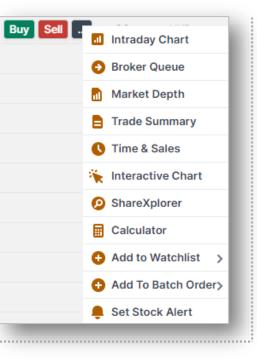
Click here to open the time and sales data for the stock.





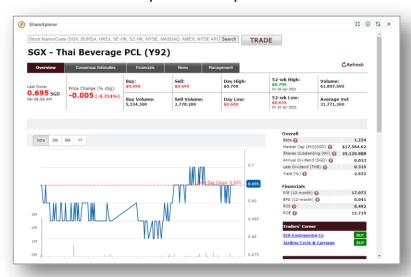


SHORTCUT BUTTONS



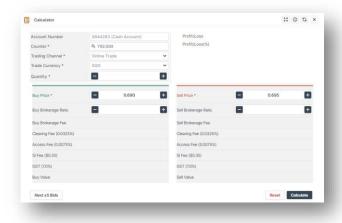
7. ShareXplorer

Click here to open ShareXplorer.



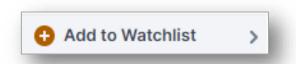
8. Calculator

Click here to open the calculator.



9. Add to Watchlist

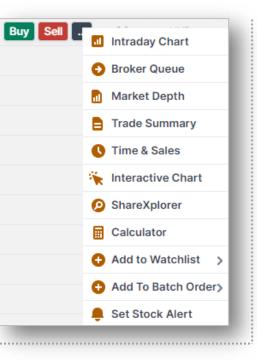
Click here to add the stock to watchlist.





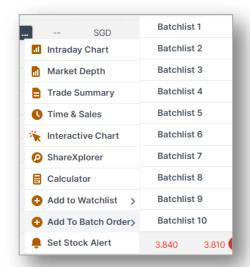


SHORTCUT BUTTONS



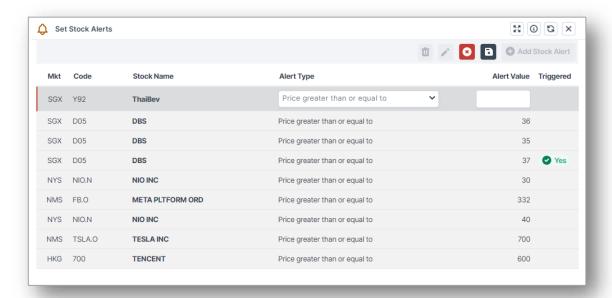
10. Add to Batch Order

Click here to add stock to Batch Order.



8. Set Stock Alerts

Click here to set the alert for this stock.







HOW TO SET UP STOCK ALERTS?

Once you are in the Set Stock Alerts widget, click on "Add Stock Alert" to add a new alert.



A new row will appear.

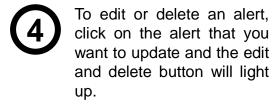
Select your alert type and enter your alert value.



Click on the Save Button to activate the alert. Not doing so will result in unsaved data.



If you do not want to activate, simply click on the cancel button.



To edit, click on the Pencil icon.

To delete, click on the Bin icon.







PORTFOLIO

- UTRADE Portfolio
- Custody Holdings







UTRADE PORTFOLIO

Disclaimer On Its Usage

- 1. UTRADE Portfolio is a feature provided for the user's convenience and should only serve as a guide. It is an indicative tool and should not be relied upon in any way for determining the user's actual shareholding or unrealised profit or loss. UOBKH accepts no responsibility or liability whatsoever for any losses or damages resulting from the use of or reliance on this feature.
- 2. All holdings (SGX and foreign markets) shown under UTRADE Portfolio may not reflect your current total share holdings with UOBKH, CDP, SRS or CPF Investment Bank. You are requested to check and confirm the correct number of shares in the UTRADE Portfolio with your CDP, SRS or CPF statements (where applicable) and Monthly Statement of Account by UOBKH. Do note that your CDP/CPF/SRS account will only be updated after the trade is settled, i.e. Trade Date+2. Clients are advised to trade with caution when placing sell orders as there will be penalties imposed by SGX for oversold trades.
- 3. Corporate actions such as stock splits/consolidation, merger, bonus issues, rights or entitlements of any form may not be updated or updated timely in UTRADE Portfolio. Similarly, any amendment of trade details and/or transfer of shares from one account to another will not be updated herein. You may update your Portfolio records through the UTRADE Portfolio editable functions.
- 4. Shares which are delisted or traded 'Over The Counter' (OTC) will not be adjusted or updated accordingly in UTRADE Portfolio.
- 5. Your executed trades will be updated in the Portfolio by the next business day. Daily portfolio updating times may vary, if there are any missing trades in the Portfolio, please inform us immediately. Before submission of new orders, always check your Order Book to confirm on order status, namely Filled, Rejected or Expired.





UTRADE PORTFOLIO

Disclaimer On Its Usage

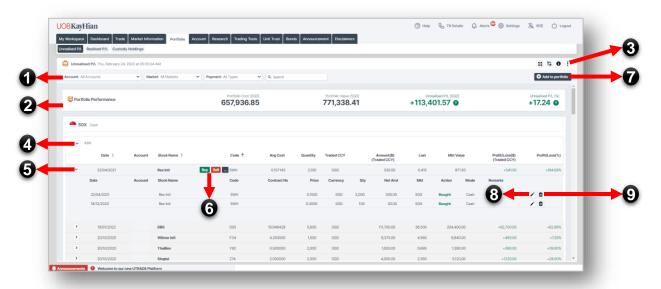
- 6. Trades for parallel counters will reflect the primary stock code. Click here to learn more about parallel counters.
- 7. The exchange rate quoted is indicative. Please refer to your contract note for the exact amount.
- 8. Please also note that the computation of average cost price is based on weighted average basis and should only serve as a guide.
- Buy-in contracts resulting from short positions are indicated with "#" before the contract numbers. These buy-in contracts will not nett off against their respective sell contracts.
- 10. Stock name with prefix "_x " denotes delisted stock or change of symbol. Kindly refer to respective Exchange websites for more details.
- 11. Contracts of Dual currency tradeable counters, where settlement is in the secondary currency, will be converted to the primary currency using an exchange rate determined by UOBKH.
- 12.Last Done Price is not available for account(s) without respective market price feed or you have not accepted the Exchange Agreement. To accept Exchange Agreement, go to 'Trade' menu, select 'Price' and choose the specific Exchange accordingly from the drop down list.





PORTFOLIO

Unrealised P/L | Realised P/L



The Unrealised and Realised P/L are indicative tools which reflects your trades done with UOB Kay Hian and your manual updates, if any.

1. Filters

Filter your portfolio by trading account, market, payment mode and stock name/code.

2. Portfolio Performance

Shows you a summary of how your portfolio is performing.

3. Widget Action Buttons

Click here to refresh, export or print the portfolio data.

4. Expand

Click here to expand or close the table to view more or less data.

5. Contract Details

Click here to expand the portfolio line to view a breakdown of it by contracts.

6. Shortcut Buttons

Hover over any stock to view additional shortcut buttons such as Buy, Sell, Portfolio Details, Intraday Chart, Broker Queue, Market Depth, Trade Summary, Time & Interactive Sales. Chart, ShareXplorer, Calculator, Add to Watchlist, Add to Batch Order and Set Stock Alert.





PORTFOLIO

6. Portfolio Details

Shows you a breakdown of your stock portfolio by contract.

Click on the Edit (Pen Icon) or Delete (Bin Icon) to change your portfolio details.



7. Add Contract to Portfolio

Click here to manually add contracts to your portfolio.



8. Edit Portfolio

Click here to manually edit and update the contract details in your portfolio.



9. Delete Contract from Portfolio

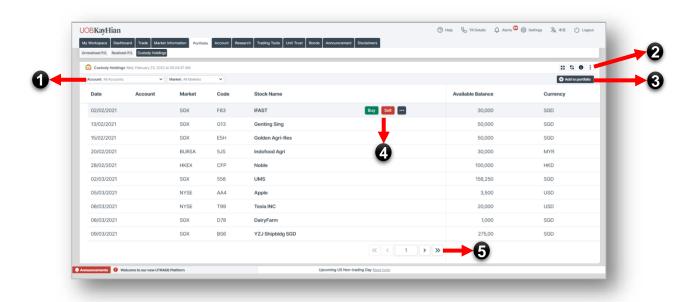
Click here to manually delete contracts from your portfolio.







Custody Holdings



Custody Holdings allows you to view your available holdings balance for each counter in real-time.

1. Filters

Filter your holdings by trading account and market.

2. Widget Action Buttons

Click here to refresh, export or print the holdings data.

3. Add to Portfolio

Click here to manually add contracts to your portfolio.

4. Shortcut Buttons

Hover over any stock to view additional shortcut buttons such as Buy, Sell, Intraday Chart, Broker Queue, Market Depth, Trade Summary, Time & Sales, Interactive Chart, ShareXplorer, Calculator, Add to Watchlist, Add to Batch Order and Set Stock Alert.

5. Pages

Click ">" to view more holdings.





ACCOUNT

- Account Activities
- Trade History
- E-Statement
- Account Details
- Account Limits
- Rewards

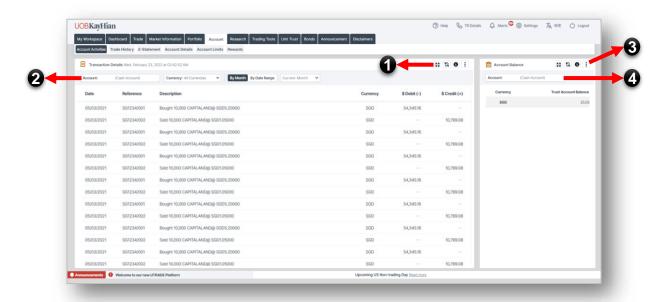






ACCOUNT ACTIVITIES

Transaction Details | Account Balance



Account Activities gives you a detailed report of your past transaction details and shows you a breakdown of your trust account balance by currency.

1. Widget Action Buttons (Transaction Details)

Click here to refresh or export your transaction data, or to maximise the widget.

2. Filters (Transaction Details)

Filter your transaction details by trading account, currency and month/date range.

3. Widget Action Buttons (Account Balance)

Click here to refresh your trust account balance data, or to maximise the widget.

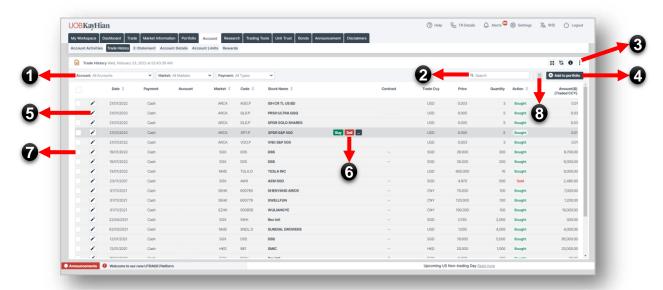
4. Filters (Account Balance)

Filter your trust account balance by trading account.





TRADE HISTORY



Trade History shows you all the contracts that have been added to your portfolio, whether it be by the system or by yourself.

1. Filters

Filter your trade history by trading account, market and payment mode.

2. Counter Search

Filter your trade history by stock name/code.

3. Widget Action Buttons

Click here to refresh, export or print your trading history.

4. Add to Portfolio

Click here to manually add contracts to your portfolio.

5. Edit Portfolio

Click here to manually edit and update the contract details in your portfolio.

6. Shortcut Buttons

Hover over any stock to view additional shortcut buttons such as Buy, Sell, Intraday Chart, Broker Queue, Market Depth, Trade Summary, Time & Sales, Interactive Chart, ShareXplorer, Calculator, Add to Watchlist, Add to Batch Order and Set Stock Alert.

7. Check Box

Select contracts to delete from you portfolio.

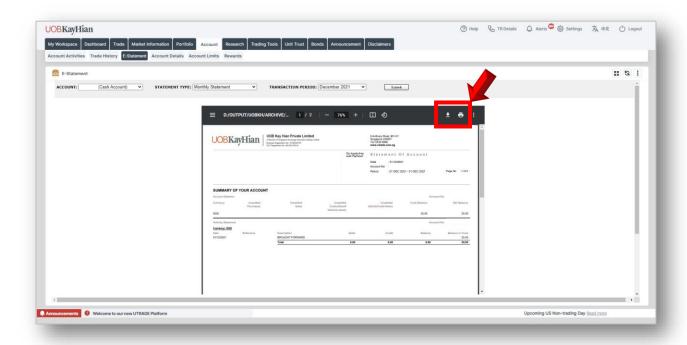
8. Delete

After selecting the contracts to delete, click on the delete button (bin icon) to delete them.





E-STATEMENT



View your Monthly Statement (up to 3 months), Contra statement and Contract statement with the E-statement widget.

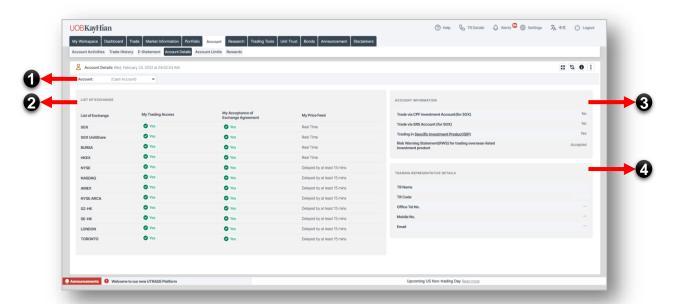
Note: You will not see any data upon opening the E-Statement widget. Please use the filter (Trading Account, Statement Type, Transaction Period) to search for your contracts. Click "Submit" after you have chosen your filters and your statement will appear below.

Depending on what browser you are using, the e-statements download method may differ. If you are seeing the same thing as the above image, simply click on the download button to download the pdf or the print button to print out the statement (as marked by the arrow).





ACCOUNT DETAILS



The account details widget shows you information about your eligibility to trade in various markets and investment products. In this widget, you can also find your Trading Representative's contact information.

1. Filter

Filter your account details by trading account.

2. List Of Exchange

Shows you what trading access you have and whether you have already accepted the exchange agreement for each exchange that you have trading access to.

Please note that the exchange agreement has to be accepted before the prices will show. You can accept the agreements via this page. If your exchange agreement shows "No", simply click on it to accept.

3. Account Information

Shows you whether you can trade via CPF or SRS (for SGX), or whether you are eligible to trade in SIP Products.

If you are trading foreign shares, please note that the Risk Warning Statement (RWS) will have to be accepted before you can start trading. You may accept it here.

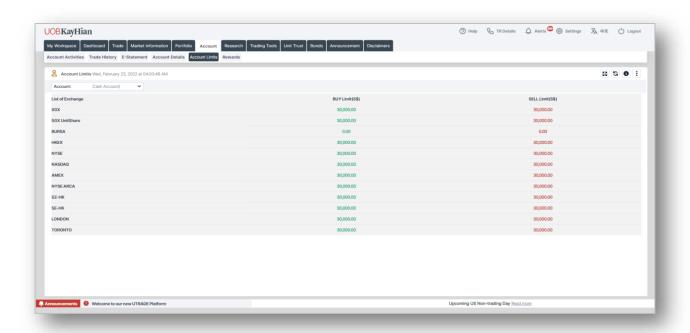
4. Trading Representative

Find out who your trading representative is and view their contact details here.





ACCOUNT LIMITS



View your buy and sell limits here by trading account and market.





UTRADE REWARDS



For every S\$1 brokerage you give to us, we return you 1 reward point. You can exchange these reward points for gifts via our UTRADE Rewards widget.

1. Redeem Rewards

Click here to open the list of redeemable items to redeem.

2. Available Points

Shows you the total amount of available reward points that you currently have.

3. Points Expiring

Shows you the total number of points that will be expiring and its expiry date.

Please note that expired points cannot and will not be reinstated.

4. Filter By Categories

Filter the list of redeemable items by the categories shown above.

5. Reward Items

Click on any of the reward items to redeem. Follow the redemption instructions to complete your redemption. Please note that Trade rebates redeemed will go to your master account.

6. Cart

To view or check your cart out, click here. Please ensure that you have checked all items out.





UTRADE REWARDS

7. My Points

Shows you a breakdown of your reward points (brokerage or bonus) and its expiry dates.

Brokerage Points are what you earned from trading with us, while Bonus Points are additional points that we give for promotions or other events.

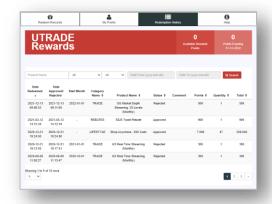
Please note that Bonus Points will have to be used up first before Brokerage Points can be used.



8. Redemption History

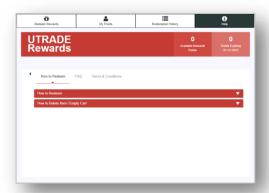
View your pending redemption status and past redemptions here.

If you have made a successful redemption, it will appear here.



9. Help

Under Help, you can view a simple guide on how to redeem reward items, frequently asked questions (FAQ) and terms and conditions guiding the use of UTRADE Rewards.

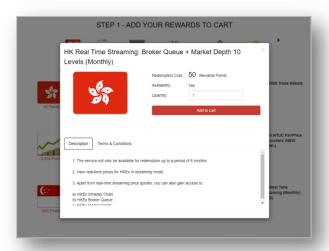




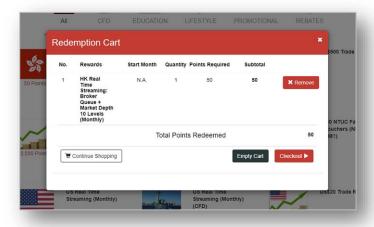


HOW TO REDEEM?

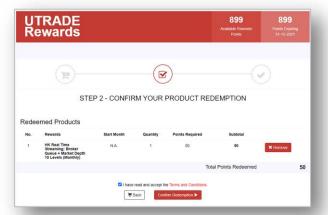
Select the item you want to redeem. Input the required details in the fields provided and hit the "Subscribe" button.



Next, proceed to your shopping cart to checkout.



Once that is done, confirm your redemption to complete the process.

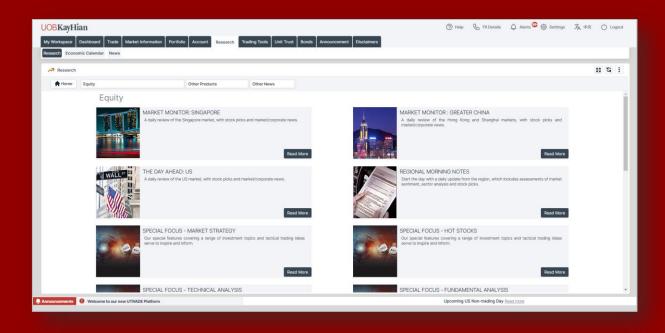






RESEARCH

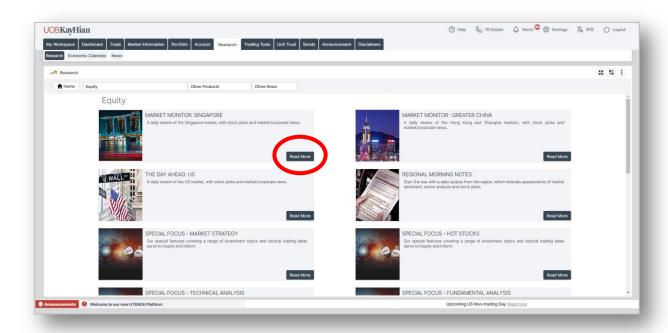
- o Research
- o Economic Calendar
- o News







RESEARCH



The research widget brings you all the latest research done by our Analyst Team.

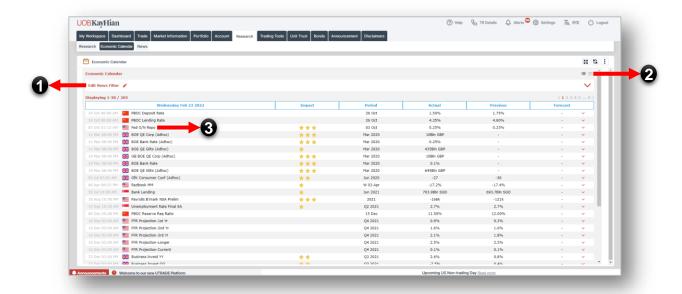
- 1. To view the research that you want, click on the "Read More".
- 2. Next, click on the PDF icon circled in red to open the research report.







ECONOMIC CALENDAR



The economic calendar (ECI) widget brings you information about the upcoming market events happening around the world.

1. ECI Filter

Click here to filter events by date range, market, impact and ECI categories.

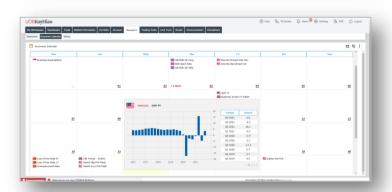


2. Changing View

Toggle between a list and a calendar view.

3. Details

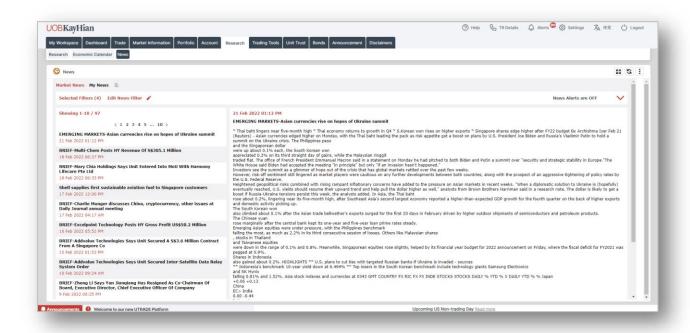
Click on any events to view more details.





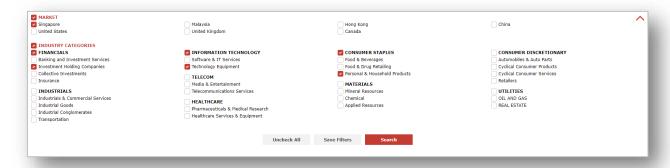


NEWS



Always keep abreast of the latest market news around the whole with the News widget.

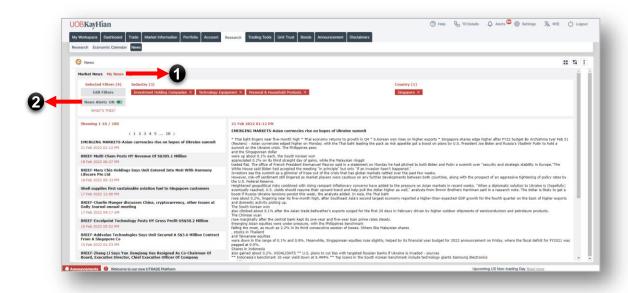
Filter the news by markets and industries. Don't forget to save your filters once you are done selecting.







HOW TO SET UP NEWS ALERTS?



- 1. To set up news alerts push notifications, go to the My News tab in the News widget.
- 2. Click on the slider beside the text "News Alerts" to turn on news alerts.
- 3. Go to your UTRADE SG mobile app and ensure that you are registered for push notifications. You can check whether your device is registered in the app by going to Main Menu → Settings → Notifications.





TRADING TOOLS

- ShareXplorer
- o ChartGenie
- Stock Screener
- US ETF Screener
- TechAnalyzer





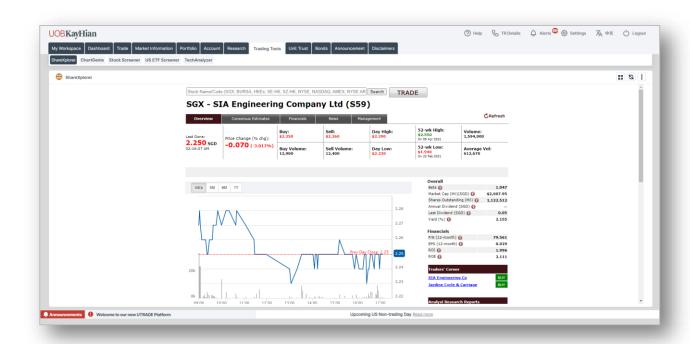


SHAREXPLORER

ShareXplorer is a widget which provides information about the fundamentals of the company behind the stock.

Information such as:

- Business Profile
- Consensus Estimates
- o Financials
- News
- Management
- o Charts







CHARTGENIE

ChartGenie is the go-to widget for technical traders. It is a screening and analysis tool that gives traders a clearer view of the technical charts.

ChartGenie will triggers alerts on stocks which good technical signals, helping traders to make better informed trading decisions.

Click on the **ChartGenie User Guide** to learn more.



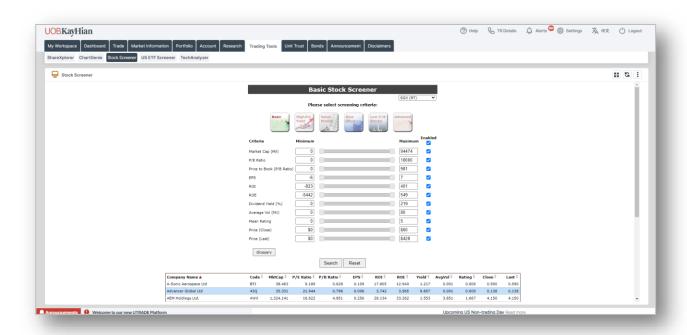




STOCK SCREENER

Explore new stocks with the Stock Screener widget.

- Choose the market you want to look at.
- 2. Fill in the criteria for the stocks you are looking for.
- 3. Click Search. The search results will appear in a table below.



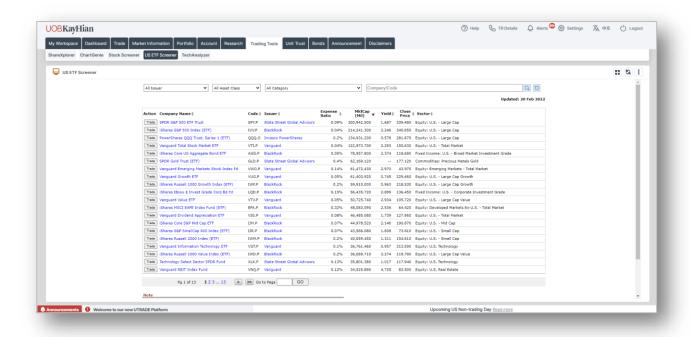




US ETF SCREENER

Explore new US ETFs with the US ETF Screener widget.

- Filter the selection by Issuer, Asset Class, Category, Company Code.
- Click Search. The search results will appear in a table below.
- 3. In the table, click on the Company Name or Issuer Name to find out more details.
- 4. To trade, click on the "Trade" action button under the Action column.







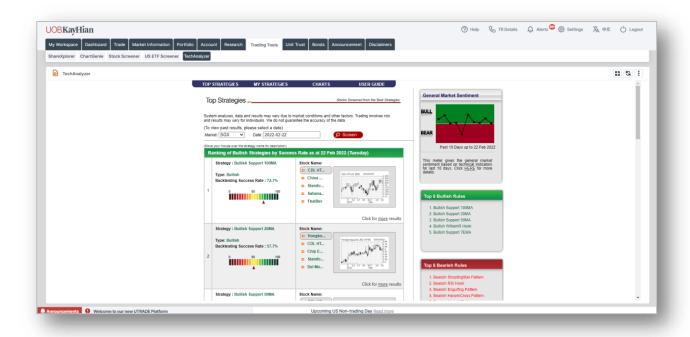
TECHANALYZER

TechAnalyzer is a stock screening widget based on technical analysis.

It comprises two modules:

- Top Strategies
 - Selects stocks according to the technical strategies that have worked best in the recent 10 days.
- My Strategies
 - For users who are looking to customize their own trading strategies according to different market conditions, with a comprehensive list of technical indicators.

Click on the <u>TechAnalyzer User Guide</u> to learn more.







UNIT TRUST

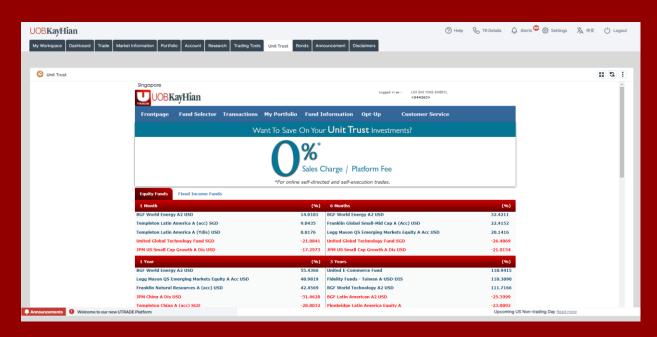
Unit Trust is a widget that allows you to trade in unit trust funds.

In this widget, you can:

- Search for unit trust funds
- View in-depth fund information and strategies
- Buy, sell or switch funds
- View your portfolio of funds
- Create your own watchlist of funds

Note: To access this widget, you will need to firstly pass the Customer Knowledge Assessment (CKA).

For more information, your may <u>click here refer to the FAQs</u> or contact your trading representative or our Client Services helpdesk.







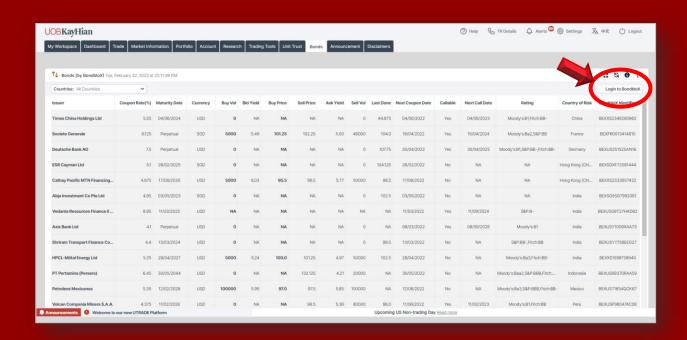
BONDS

By BondbloX

Bonds by BondbloX is a widget that allows you to view the available bonds for trading.

To trade Bonds, click on the "Login to BondbloX" button (marked below by the red circle).

You may contact your trading representative or our Client Services helpdesk for more details.

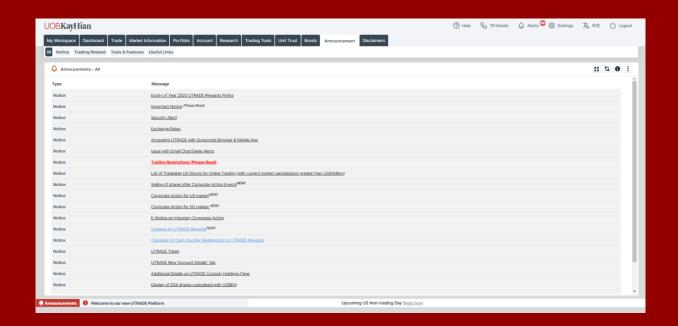






ANNOUNCEMENT

Get updated on our latest announcements with the announcement widget.

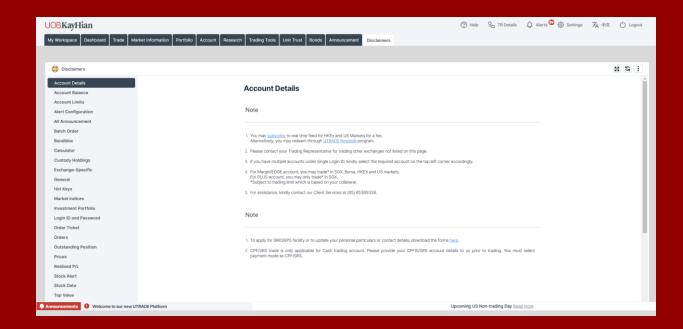






DISCLAIMERS

The disclaimer widget allows you to view all the special notes and disclaimers for each widget in UTRADE.







At the top right corner of the UTRADE Web platform, you will be able to find some useful buttons to aid you in your trading journey with us.



HELP

FAQ Contact Us Home Forms

TR DETAILS

ALERTS

Alert Mailbox

LANGUAGE

LOGOUT

SETTINGS

Login ID and Password

- Change Login ID
- Change Password

Preferences

- Set Master Account
- Hot Keys
- Set Landing Page
- Trade on Click

Alert Configuration

- o SMS
- o Email
- Web

Font Settings

Search Filter



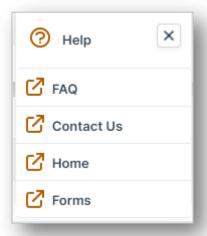


Help | TR Details | Alerts

1. Help

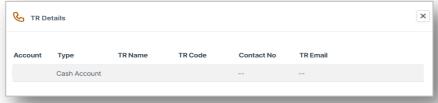
Click on the help button to:

- Open the FAQ (Frequently Asked Question) page.
- Find our Client Services contact information.
- Go to the UTRADE Homepage.
- Find helpful or relevant forms.



2. TR Details

Click here to get information about your trading representative, including your TR's contact details.

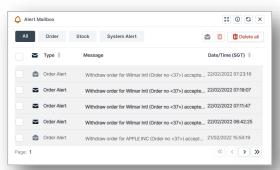


3. Alerts

The Alert Mailbox contains your alerts history, i.e. the alerts you have received for the past 6 months.

To delete, select the alerts you want to delete and click the bin icon, or simply click "Delete all".

Note: Once your alert history has been deleted, it cannot be reinstated.







Language | Logout | Settings - Login ID And Password

4. Language

UTRADE Web offers the platform in 2 languages:

- o English
- Chinese (Simplified)

To change the language of the platform, simply click on the Language button and the site will automatically switch.



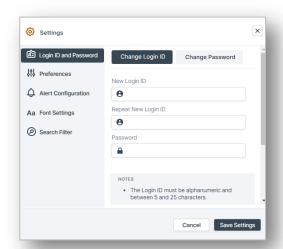
5. Logout

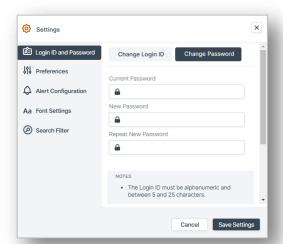
Click here to Logout of UTRADE.



6. Settings - Login ID & Password

Click here to change your login ID or Password. Remember to Save Settings once done.









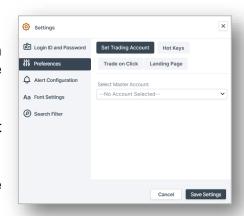
Settings – Preferences

7. Set Trading Account

Select your master account here. Choose an account that you often use. Remember to Save Settings once done.

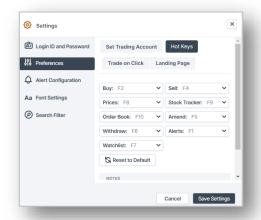
The master account is the default account that you will use every time you trade.

It also affects where your trade rebates go. Trade rebates redeemed will go to your master account.



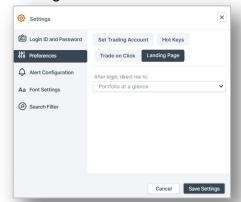
8. Hot Keys

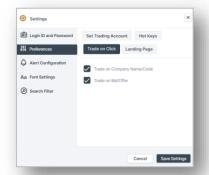
Set up Hot Keys to aid you in your trading journey. Remember to Save Settings once done.



9. Landing Page

Set up the default landing page that you want to go to upon login. Remember to Save Settings once done.





10. Track on Click

For Top Movers and Watchlist, if you want the Place Order page to open automatically when you click on the stock name/code or the buy/sell prices, check these boxes. Remember to Save Settings once done.

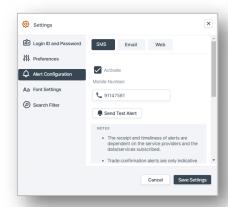




Settings – Alert Configuration | Font Settings | Search Filter

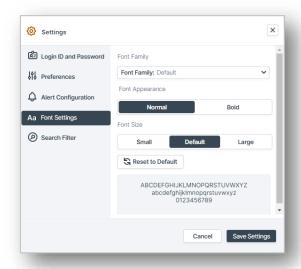
11. Alert Configuration – SMS | Email | Web

Activate your SMS, Email and Web alerts here.



12. Font Settings

Adjust font family, appearance and font size here.



13. Search Filter

If you find that there are too many irrelevant results when you perform a counter search, you can filter out irrelevant stocks by market and products here







SUPPORTED BROWSERS



Google Chrome

94.0.4606.71 and above



13.1.2 and above



Microsoft Edge

94.0.992.38 and above



Mozilla Firefox

92.0.1 and above





THANK YOU

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