



PHILLIP  
FX365

PLATFORM GUIDE

Introducing the New Generation of Phillip FX365

## Table of Contents

### **Getting Started**

<i>Logging onto FX365 .....</i>	<b>1</b>
<i>Understanding the FX365 Platform .....</i>	<b>2</b>
<i>Accessing the News Panel.....</i>	<b>2</b>
<i>Working with Grid Tiles .....</i>	<b>3</b>
<i>Working with Market Tiles.....</i>	<b>3</b>
<i>Accessing the Blotter.....</i>	<b>4</b>
<i>Placing Orders on Market Tiles .....</i>	<b>5</b>

### **Order Placement & Management**

<i>Placing Orders on Grid Tiles .....</i>	<b>6</b>
<i>Viewing Placed Orders.....</i>	<b>7</b>
<i>Modifying Orders .....</i>	<b>7</b>
<i>Cancelling Orders.....</i>	<b>9</b>
<i>Working with Positions in the Blotter .....</i>	<b>10</b>

### **Working with FX365 Charts**

<i>Configuring a Chart.....</i>	<b>12</b>
<i>Configuring Time Interval and Range .....</i>	<b>13</b>
<i>Apply/Edit/Move/Delete Drawings.....</i>	<b>14</b>
<i>Working with Chart Studies .....</i>	<b>15</b>
<i>Working with Chart Lower Studies .....</i>	<b>16</b>

# Getting Started

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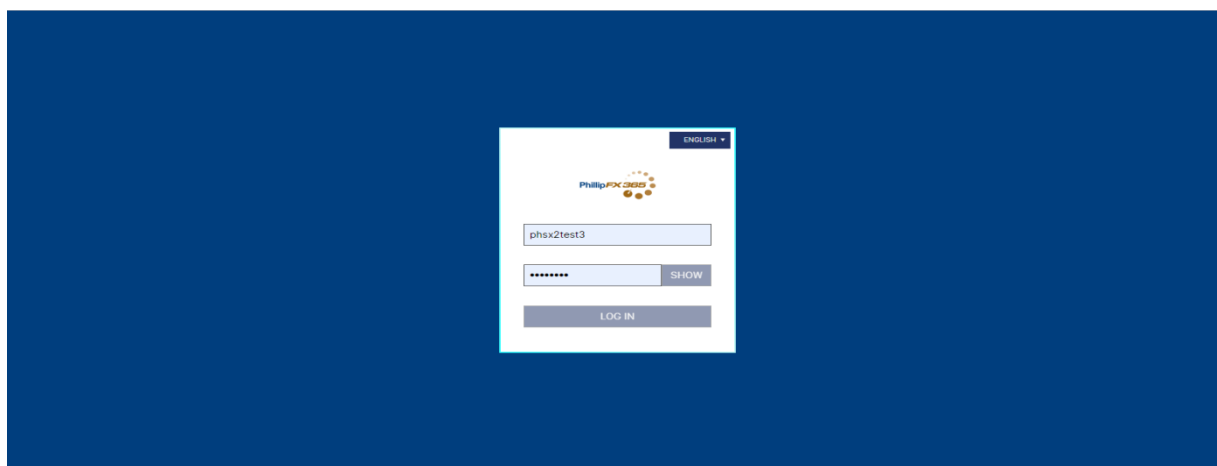
## Logging onto FX365

Upon enrolling onto the trading platform, your account manager will provide you with your account userid and password. Use these credentials to log into the application. Note that the userid and password are case-sensitive.

When you log in to your FX365 account for the first time, you must change your password. Passwords must be a mix of letters and numbers of at least eight characters. Passwords must include one number and one capital letter.

To log in:

1. Launch your internet browser.
2. Click in the Address Bar, enter <https://phillipfx365.webtrader.fxdnld.com/login.html> and press Enter. The FX365 Login page appears



4. Click in the Username text field and enter your username.
5. Click in the Password text field and enter your password
7. Click Login. The FX365 interface appears.

## Understanding the FX365 Platform

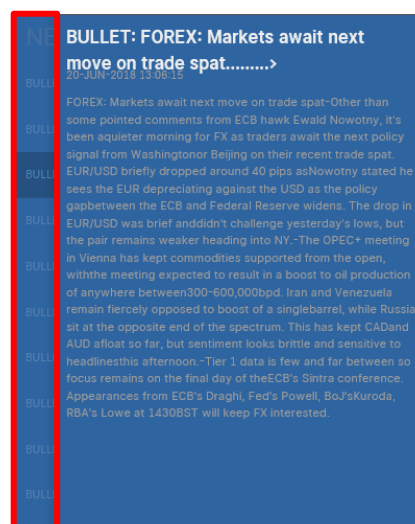


Components:

1. **Grid Tile:** Easily monitor a large set of currency pairs and execute trade in a range of sizes.
2. **Chart Panel:** Select from multiple chart types, cursor types, layout to suit any long or short-term requirements. The chart also provides studies and drawings that can help you interpret pricing information.
3. **News Panel:** Gain access to the latest market news at the tip of your fingers
4. **Blotter:** View and manage all trade related information.

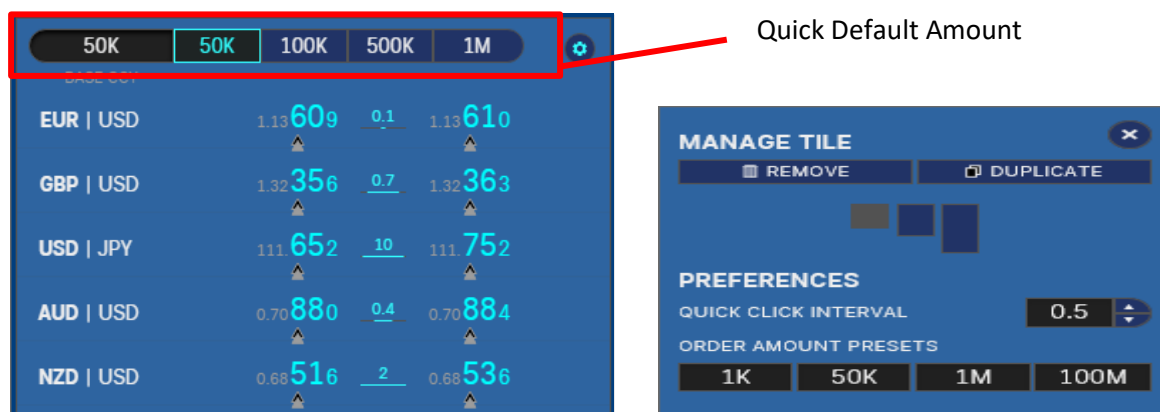
## Accessing the News Panel


Upon selecting a bullet news on the panel, the full article expands within the same window. To return to the original page, click on an empty space within the window.



## Working with Grid Tiles

You can configure Grid tiles in three different heights, each to contain different number of currency pairs (5 – Small, 11 – Medium, 17 – Large). You can also customise the currency pairs, quick default amount, rate increments that appear in the quick offset when you place your cursor over the rate.



Selecting the setting icon  will open a management window that will allow you to configure the different settings.

## Working with Market Tiles



### Functionality

**Quick Click Trading Area:** Market Tiles enable Quick Click orders, which you can configure as either single or double-click or to open the “Place Order” popup window. Between the bid/ask button displays the current spread.

**Currency Pair Selector:** Single click on the currency pair selector to reveal a drop down list and an empty search field which enables you to find your desired currency pair by typing in the search field or selecting it within the drop-down list.

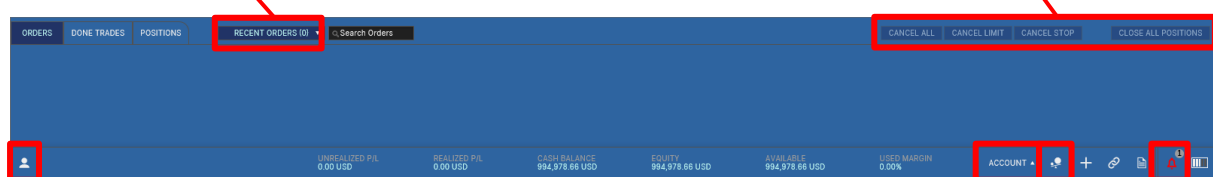
## Accessing the Blotter

FX365 blotter allows for easy access to order, done trades, and positions. The order tabs contains four filters in the drop down list (All Orders, Recent Orders, Open Orders, Done Order). Done trades and Positions shows you relevant information in a table format.

The top right corner features three Quick Cancel Order buttons, to enable you to quickly cancel all orders, just limit orders, or just stop orders. When you click on one of these buttons, FX365 displays a popup that shows you which orders you are about to cancel.

Click to view the entire drop-down list for filters

Quick Cancel buttons



Account menu

Margin Account Information icon

Leverage icon

Notification icon

### Functionality

**Margin account information icon:** Selecting it will display your account information

**Leverage icon:** Selecting it will enable you to quickly view your leverage of the individual currency pairs.

**Notification icon:** Selecting it displays the list of recent notifications with the option to clear all

**Account menu icon:** Selecting it enables you to log out, lock screen, and toggle settings of the platform according to your preferences.

# Orders Placement & Management

Orders are your instructions to buy or sell currency pairs. FX365 flexible features enable you to work with a wide array of order types, ranging from simple to complex orders:

### Simple Orders

- Market Order
- Limit Orders
- Stop Orders
- Trailing Stop Orders

### Complex Orders

- Once Cancel Other (OCO) Orders

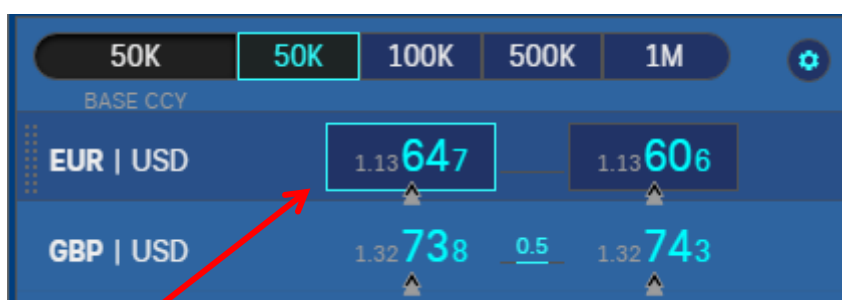
## Placing Orders on Market Tiles

The image displays two screenshots of the Phillip FX365 trading interface. The top screenshot shows a market tile for EUR | USD with bid/ask prices and volume. Red circles 1 and 2 point to the bid and ask buttons respectively. The bottom screenshot shows the order entry form with labels for Order Direction, Trade Quantity, Order Type, Rate, Expiry Type, and Stop Loss/Take Profit.

1. Click the original rate button to access the create order ticket, and define the various fields explained below before submitting the order.
  - **Order Direction** – Specify order to be “Buy” or “Sell”
  - **Trade Quantity** – Specify the desired quantity you wish to trade
  - **Order Type** – Limit, Stop, Market, and OCO (One-cancel-other) orders
  - **Rate** – Specify the rate for orders where applicable (Limit; Stop; OCO)
  - **Expiry Type**
    - GTC (Good Till Cancelled): Order remains in market until executed with pre-determined properties or cancelled.
    - IOC (Immediate or Cancelled): Order is cancelled if not executed immediately.
    - Timed: Order is timed to a defined period. If it remained unfilled after the defined period passes, the order will be removed from the market.
    - Date: Order will be removed if it is not filled after set date.
    - Market: Customise your own expiry time based on end of market closing
  - **Stop Loss and Take Profit Level** – Specify your stop loss and take profit levels for applicable trades

## Placing Orders on Grid Tiles

1. Click the original rate to access the create order ticket
2. Define the various fields explained above before submitting the order



Original Rate

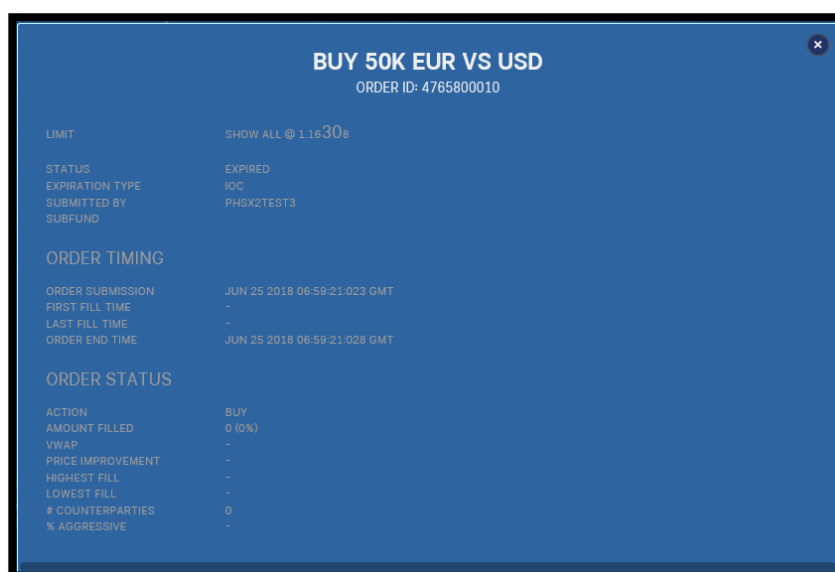
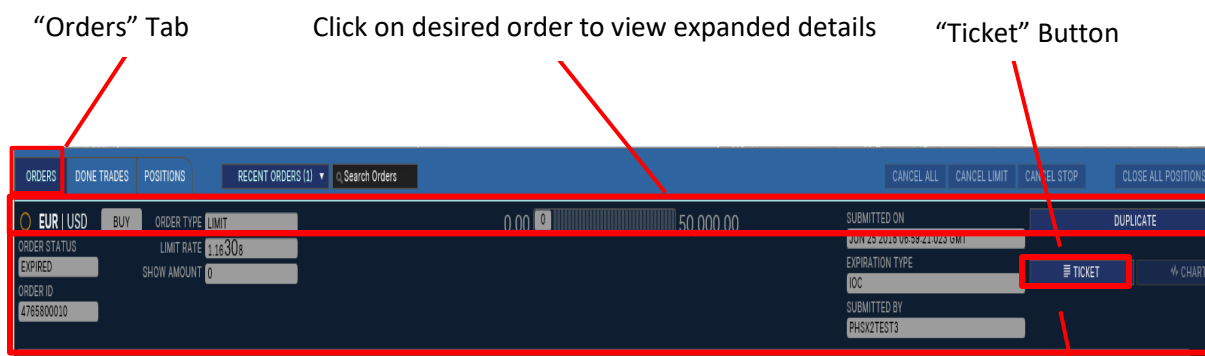


## Viewing Placed Orders

The blotter enables you to easily view the details of your orders, in the order tab of the blotter.

Steps:

1. Click the “Orders” tab in the blotter
2. Click the order you want to view
3. Click “Ticket” on the right side of the trade
4. View order summary ticket



Order Summary Ticket

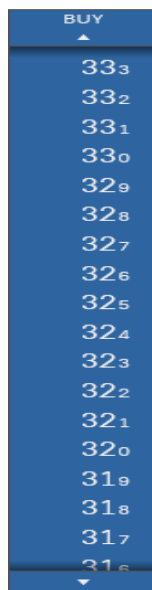
## Modifying Orders

FX365 enables you to modify the rate of Limit orders by clicking the “Edit” button within the blotter, using a rate ladder.



Edit Button

**Rate Ladder**

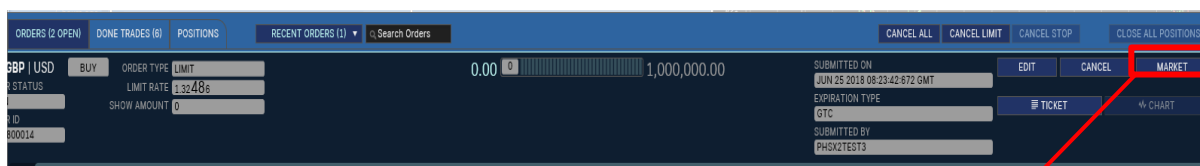


Modifying stop orders will trigger a Modify Order Dialog Popup, which will enable you to easily change available order information such as rate, amount, slippage and trail by pips, and the trigger side of Stop and Trailing Stop Orders.

**Modify Trade Dialog Popup**



To convert an open order into a Market Order, simply double-click on the “Market” button located in the blotter. Select “Yes” on the acknowledgment popup.

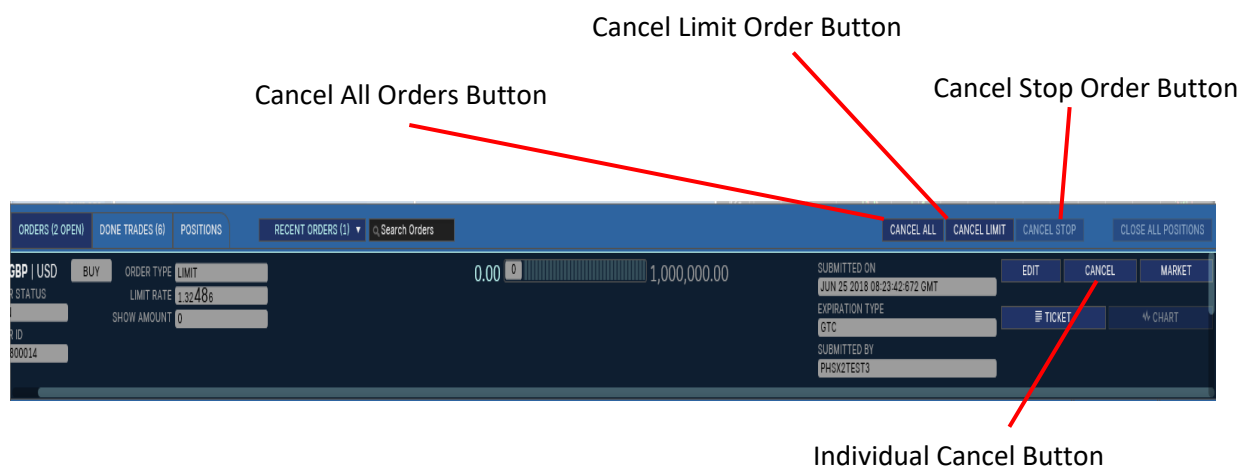


**“Market” button**

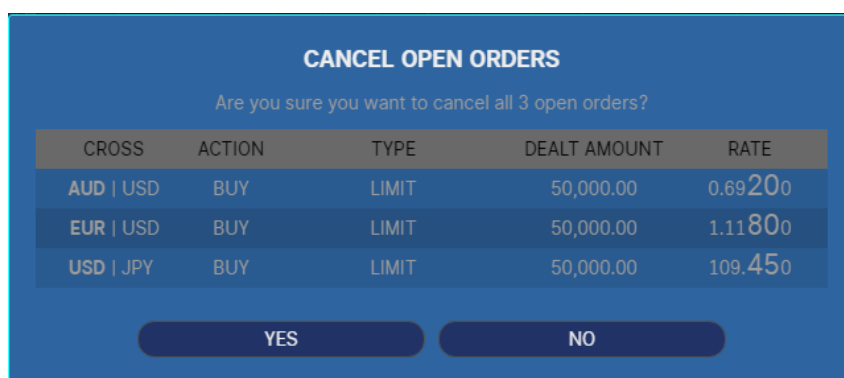
## Cancelling Orders

The blotter enables you to easily and quickly cancel individual or all orders at once.

1. **Cancelling individual order** – Locate and click the order you want to cancel, then click “Cancel” in the right end row in the Blotter.
2. **Cancelling all orders** – Ensure the order tab is selected, click on “Cancel All” located on the top right region of the blotter
3. **Cancelling limit and stop orders** – Ensure order tab is selected, click on relevant button, either “Cancel Limit” or “Cancel Stop” according to your use.
4. Upon the selection of “Cancel All”, or “Cancel Limit/Stop”, an acknowledgment popup appears requesting confirmation. Select “Yes” to complete the process.



### Acknowledgment Popup

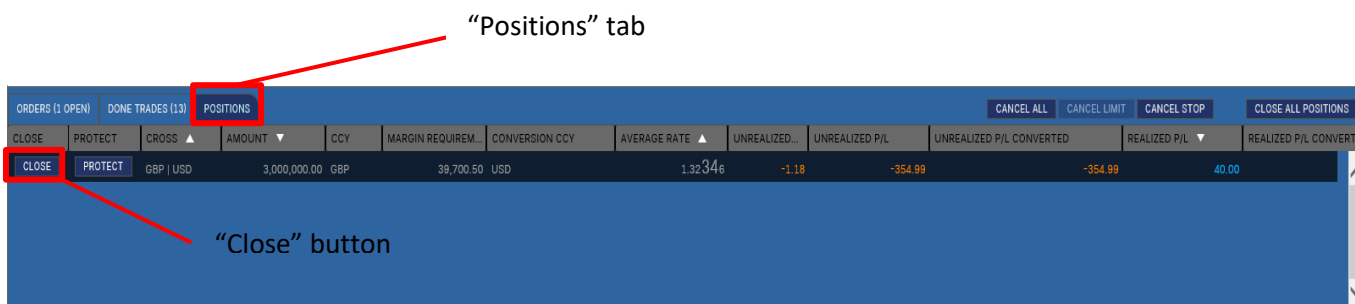


## Working with Positions in the Blotter

A position is the sum of currently open trades, the amount of a currency that you either own or have borrowed.

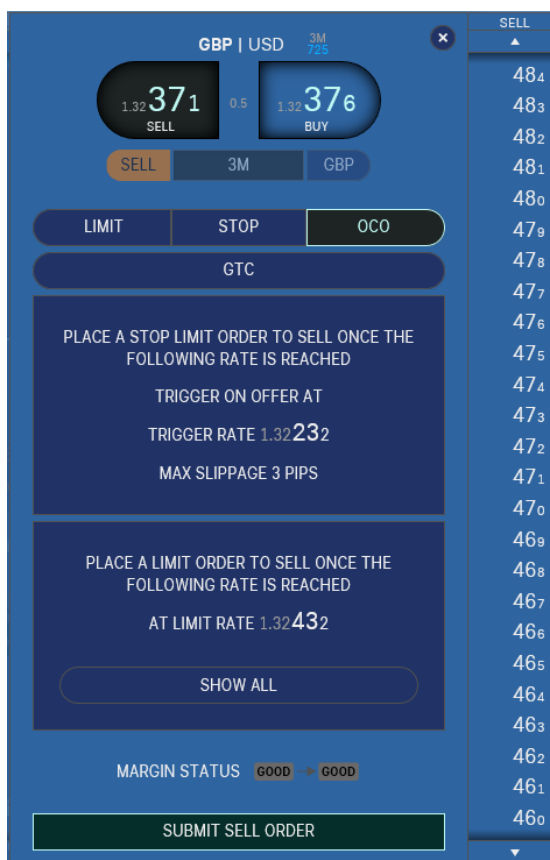
### Functionality:

1. **Viewing all current positions** - Access the blotter and click on the “Positions” tab.



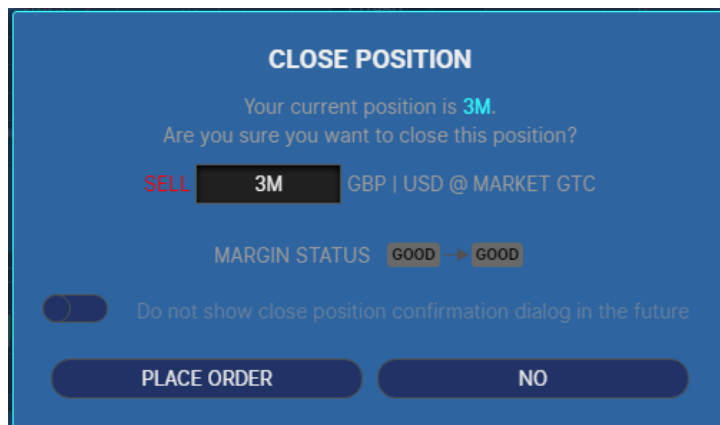
2. **Protect Position** – Click on the “Protect” button at the beginning of the row. Protect position popup appears. Input desired value, complete resting order and click Submit Order.

### Protect Position Popup



3. **Close an open position** – Click “Close” at the beginning of the row. The close position popup appears. Enter the amount you wish to close in the amount text field. Click place order.

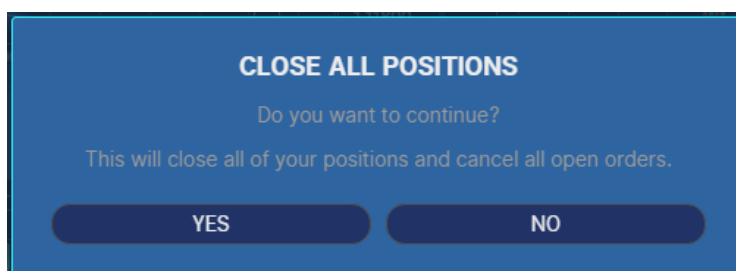
*Close Positions Popup*



4. **Closing all positions** - Click “Close All Position” button. A confirmation prompt will popup to verify decision to close all position. Select “Yes” and the process is completed.



*Confirmation Prompt Popup*



# Working with FX365 Charts

FX365 Charts display a continuous graphical record of the rate history of a selected currency pair. The chart's X-axis delineates time and its Y-axis delineates rate.

FX365 Charts may be configured to suit any long or short-term trading requirements and strategies. You can select multiple Chart types, cursor types, layouts, and etc. The chart also provides studies and drawings that can help you interpret information and postulate changes in rate direction.

## Configuring a Chart

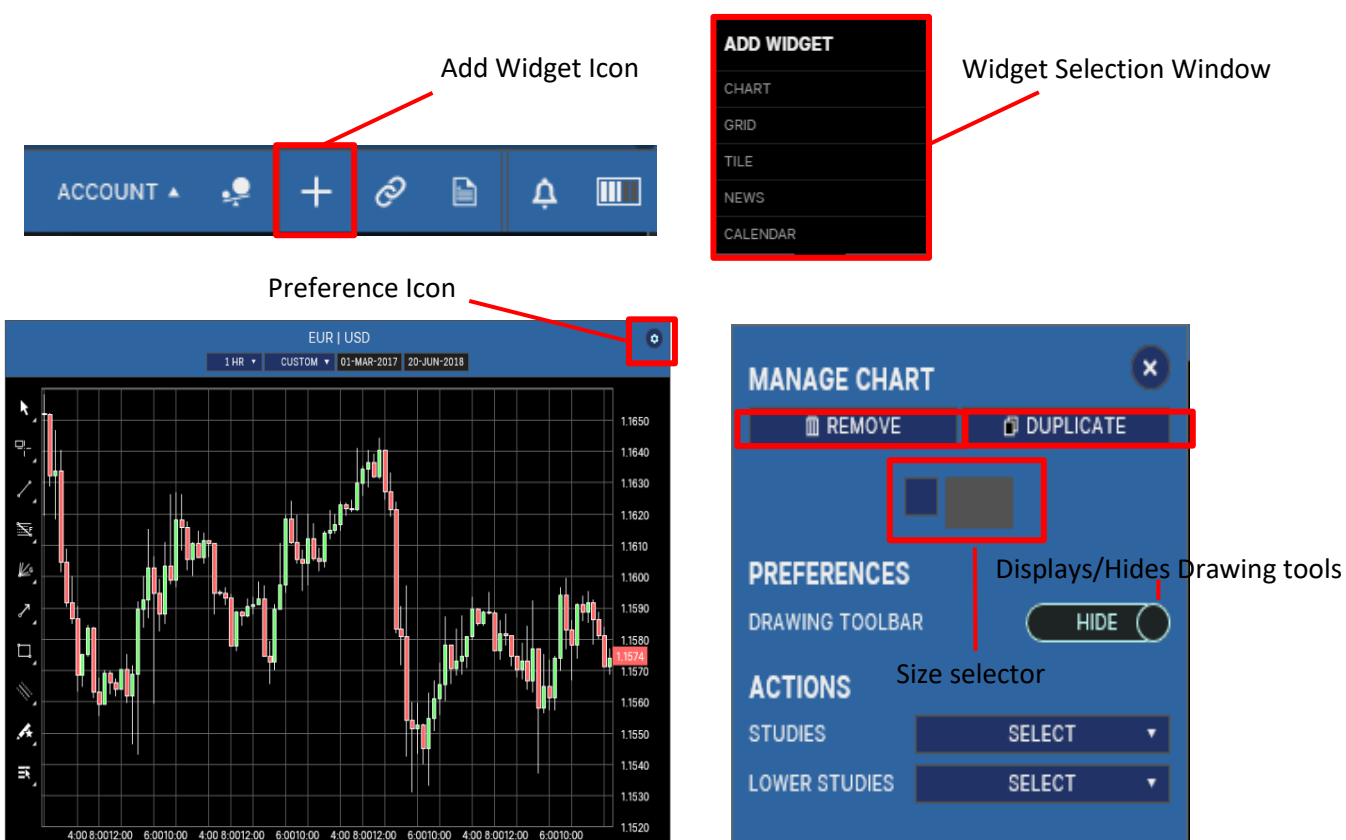
### Adding/Duplicating/Removing /Resizing a Chart

FX365 enables you to easily add a new chart to your interface. You can have one chart per currency pair and as many currency pairs as you need.

**To add a chart** – Click the Add Widget Menu at the bottom of your browser and select Chart

**To remove/duplicate a chart** – Click the Preference icon at the top right of your browser and select either remove or duplicate accordingly on the manage chart popup window.

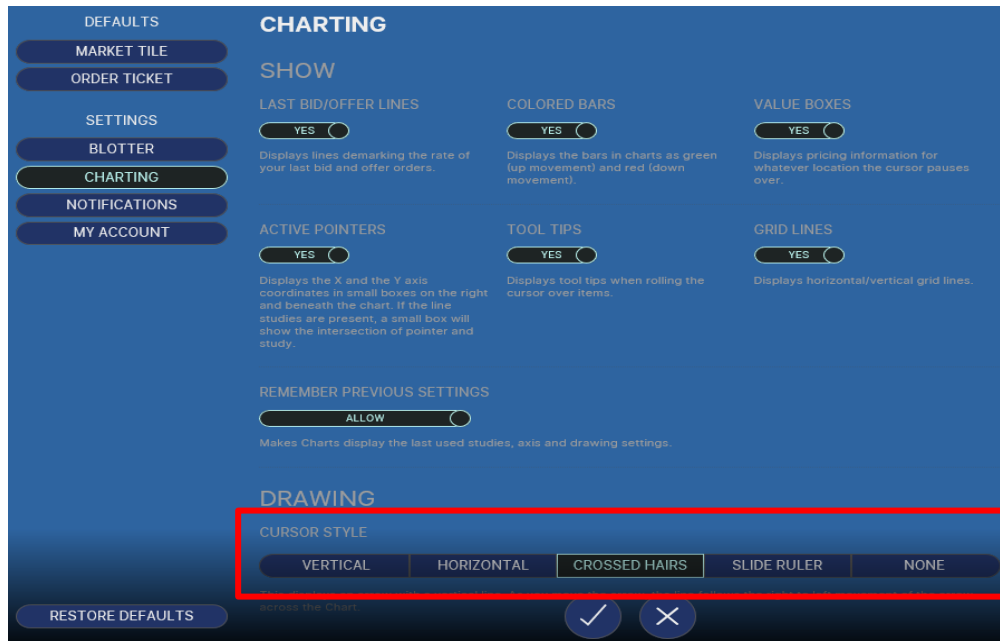
**To resize a chart** – Click the Preference icon, and click the appropriate size button on the manage chart popup



Clicking on the slider under “PREFERENCES” of the manage chart window either hides or displays the drawing toolbar.

### Configuring the Cursor Shape

1. Click the Account menu (👤) located at the bottom left of your browser to set preference.
2. Click “Charting” on the setting and preferences interface.
3. Select the desired cursor style under the section “DRAWING” on the interface.
4. Click on the tick to save the setting.



### Configuring Time Interval and Range

The interval dropdown list enables you to configure the time interval for which your chart displays data.

To configure a chart’s time interval, click the time interval menu of the relevant chart and select the desired interval. The time range of the chart may also be displayed to best suit your purposes. However, the maximum range of these settings depends on the time interval you have selected



## Apply/Edit/Move/Delete Drawings

FX365 provides 10 drawing tools with which you can create line studies to facilitate your trading activity.

- Trendline
- Support/Resistance
- Channel
- Triangle
- Fibonacci Retracement
- Fibonacci Expansion
- Vertical Cycle
- Buy Marker
- Sell Marker
- Text Marker

The drawings menu enables you to easily select a drawing to overlay into your chart. Once set, you can edit, move, and delete any drawing you create.

### Adding a drawing

1. Click the drawing button and select the type of drawing you want. In this case, we chose “rectangle”. In many cases, once you make your selection, your cursor turns into a drawing tool.
2. Click and drag the tool to create the desired drawing.



### Editing a Drawing

1. Click the drawing you wish to edit. 4 icons will appear at the bottom of the chart.
2. Click the configure icon. A properties popup window appears.
3. Change the relevant settings.





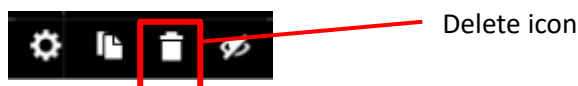
**Properties popup window**

### Moving a drawing

To move a drawing, simply click on the drawing, hold the mouse button, drag it to its new position, and release.

### Deleting a drawing

To delete a drawing, simply click on the drawing, and wait for the icons to appear at the bottom. Click on the delete icon, and the drawing is removed.



## Working with Chart Studies

FX365 has 16 studies, accessible from the studies dropdown menu.

### Displaying a chart study

To display a chart study:

1. Click on the configure icon on the top right of your browser
2. Select the type of Technical Analysis you want from the studies menu.



### Configuring a chart study

Once a study is selected, the chart displays the tool as well as a label in the upper left corner. This label contains the name of the tool, the parameters with which it is configured with an X that enables you to remove that tool from display.



Click on the label to activate a popup window where you can edit the parameters of the tool, as well as the appearance of its lines; their types; thickness, color, etc.

### Working with Chart Lower Studies

FX365 has 15 lower studies, accessible from the lower studies dropdown menu. Lower studies require different X and/or Y-axis, therefore, appear as a separate graph beneath the main chart. You can have multiple lower studies as they all appear as separate graphs below the main chart.

To display lower study on chart:

1. Click on configure icon
2. Select the type of technical analysis you want from the lower studies menu (This is the same process as adding a normal study on chart)



Lower study appear as a separate graph beneath the main graph

To remove lower study, simply click on the X located with the label at the top right hand corner of the study, and to make edits, click on the label to open a popup window where edits may be made.