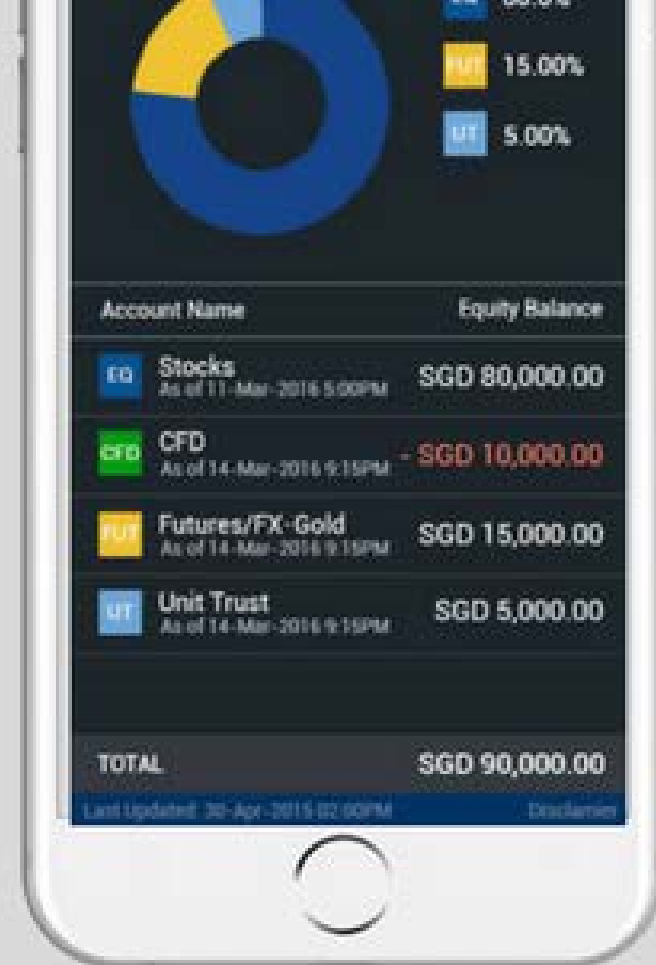




# SIMPLIFY YOUR TRADES

## POEMS Mobile 2.0

USER GUIDE V 08/2017



# Disclaimer on the use of this User Guide

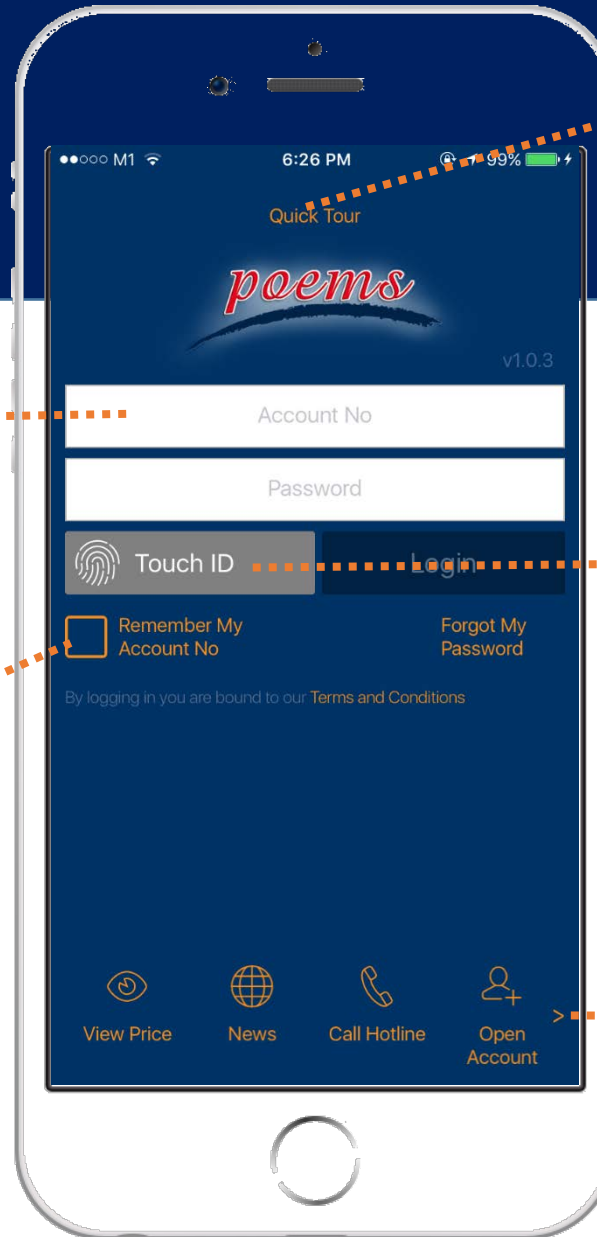


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You may wish to seek advice from a financial adviser before investing in any of the products mentioned. In the event that you choose not to seek advice from a financial adviser, you should consider whether the investment product is suitable for you.

1

# Login



Tap for a quick overview of the app

Login with your POEMS Account number and Password

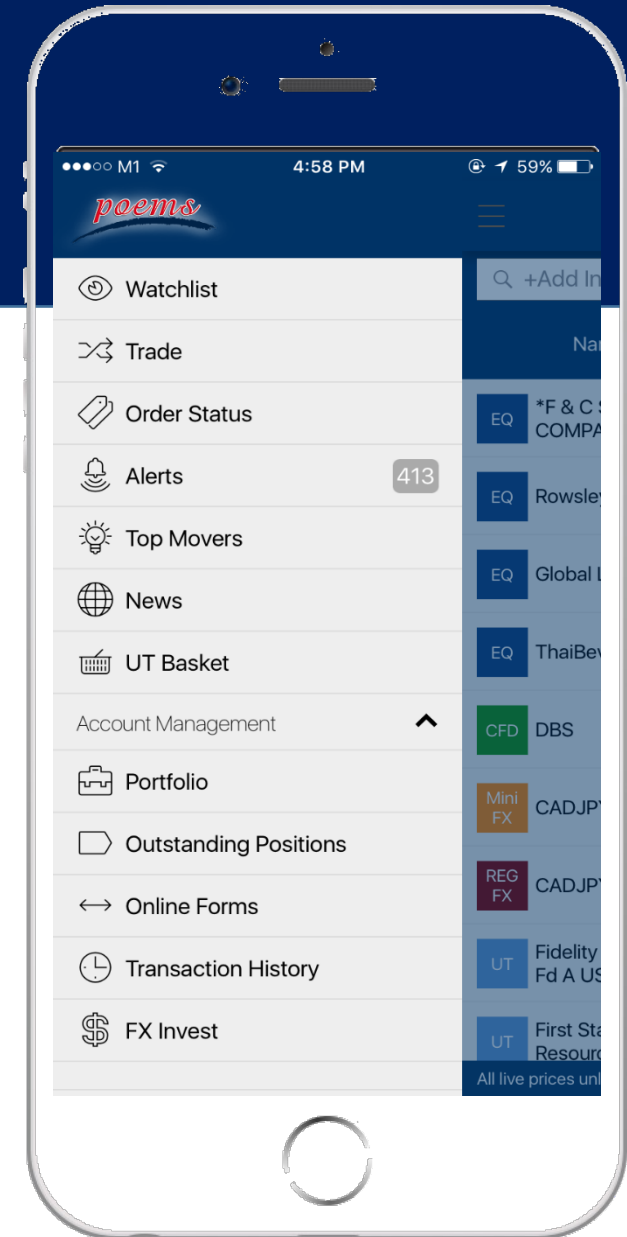
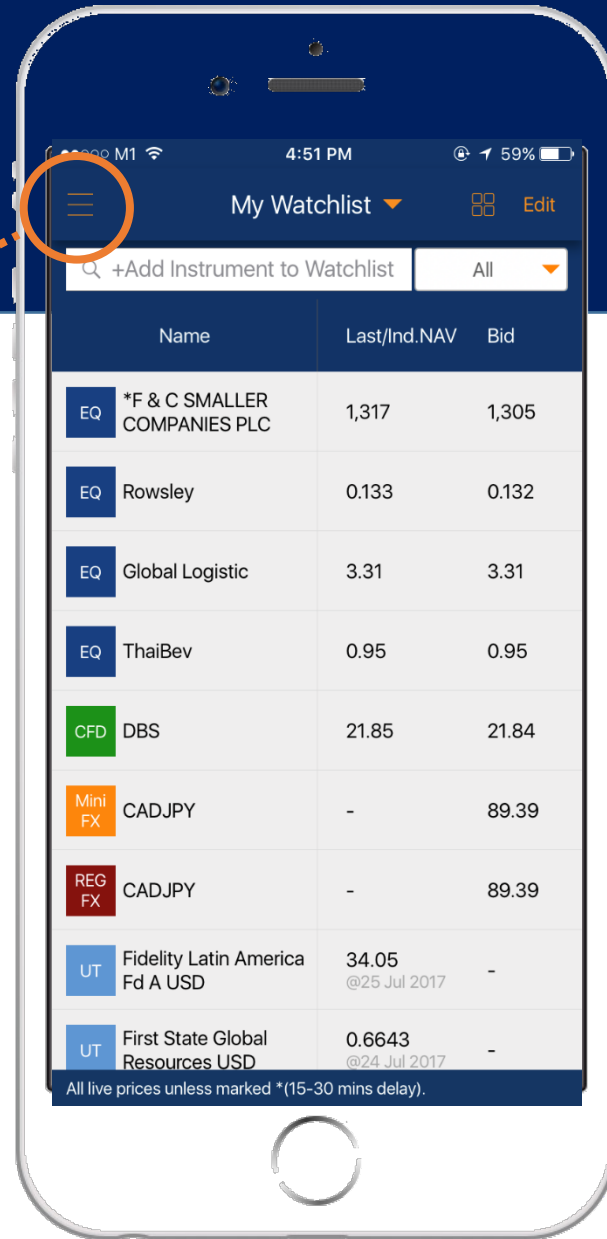
For iOS: Use Touch ID to login. First – time set up is required

**Check** this box if you would like the app to remember your account number

**Swipe left and right** for more options

# Menu

Tap on the “Menu” Icon to reveal a list of modules available on POEMS Mobile 2.0



# Watchlist

Watchlists are synchronized with POEMS 2.0

**Tap** to select your desired watchlist (max.10 watchlists)

Search counters by instrument name or symbol

**Tap** on any counter to go to Details screen; Tap and Hold reveal the contextual menu - a list of options available for the instrument :

EQ	Global Logistic
Trade	
Detail	
Chart	
News	
Set Alert	
Stock Analytics	
Market Depth	
Time and Sales	

	Name	Last/Ind.NAV	Bid
EQ	*F & C SMALLER COMPANIES PLC	1,317	1,305
EQ	Rowsley	0.133	0.132
EQ	Global Logistic	3.31	3.31
EQ	ThaiBev	0.95	0.95
CFD	DBS	21.85	21.84
Mini FX	CADJPY	-	89.39
REG FX	CADJPY	-	89.39
UT	Fidelity Latin America Fd A USD	34.05 @25 Jul 2017	-
UT	First State Global Resources USD	0.6643 @24 Jul 2017	-

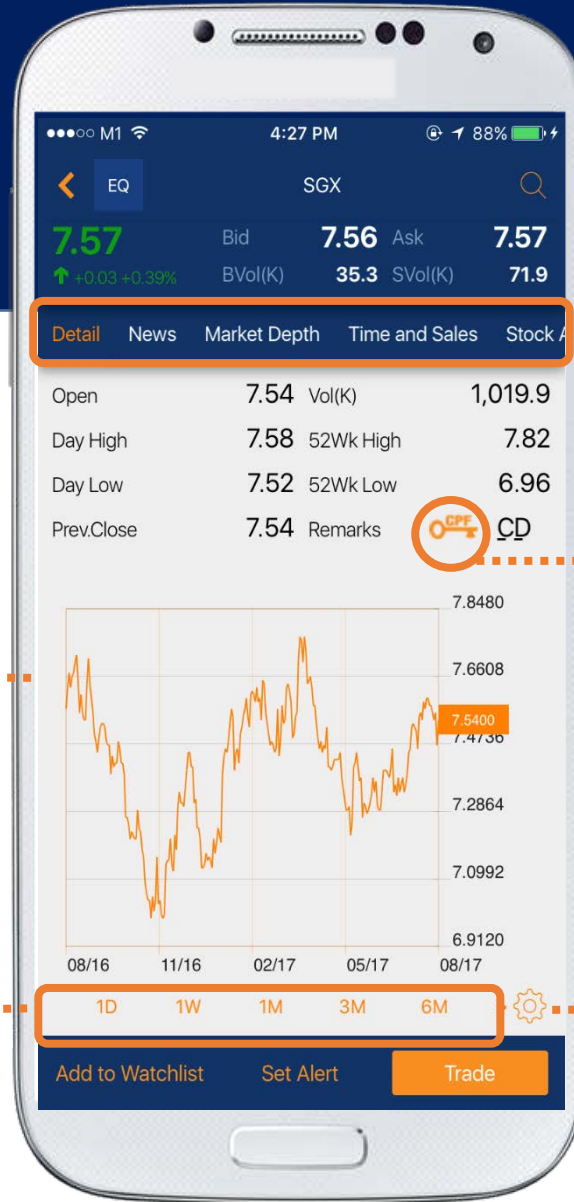
Toggle between Grid or List view

Movable panel: **Scroll left and right** to view more information

**Tap** on price info to go directly to **Trade screen**

4a

# Counter Details EQ



Swipe Right to Left to select the relevant categories for this counter

The “CPF Key” here indicates that this counter is a CPF trustee stock

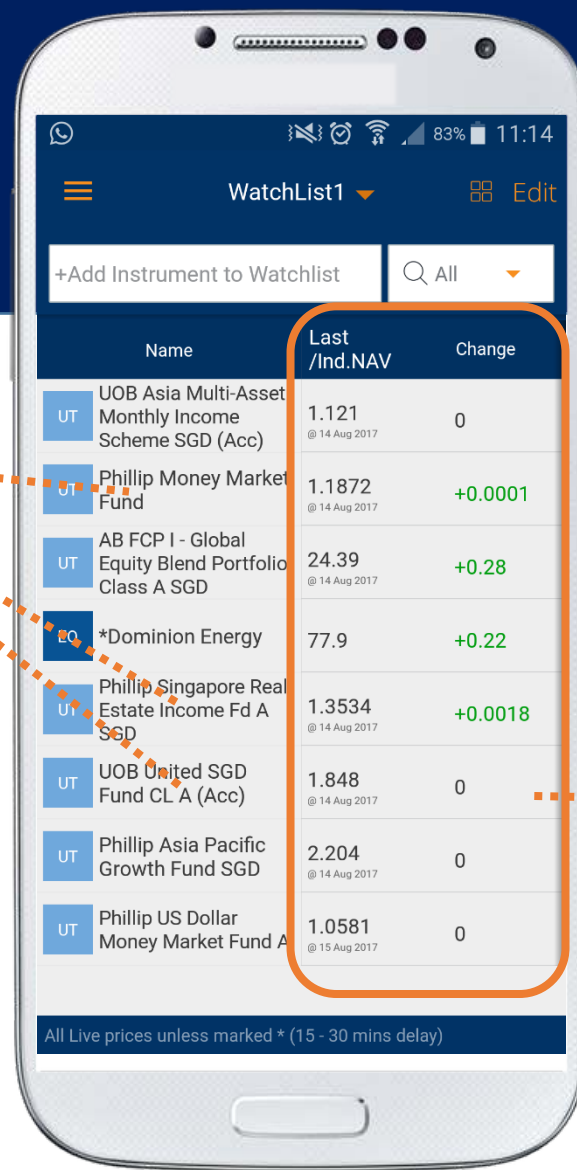
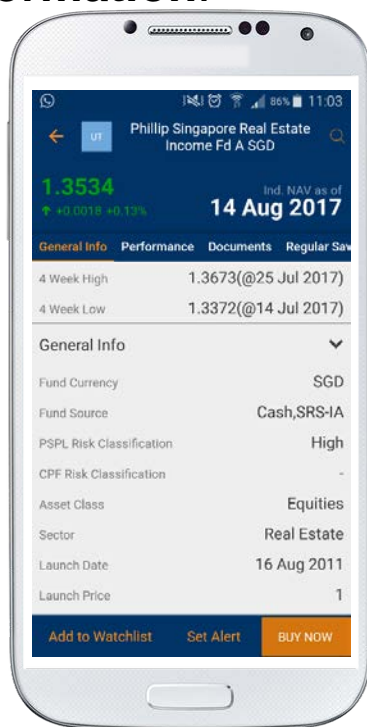
Tap to blow up full screen chart

Swipe Right to Left to select the desired Chart Range

Tap to go to Chart Settings

# Fund Details

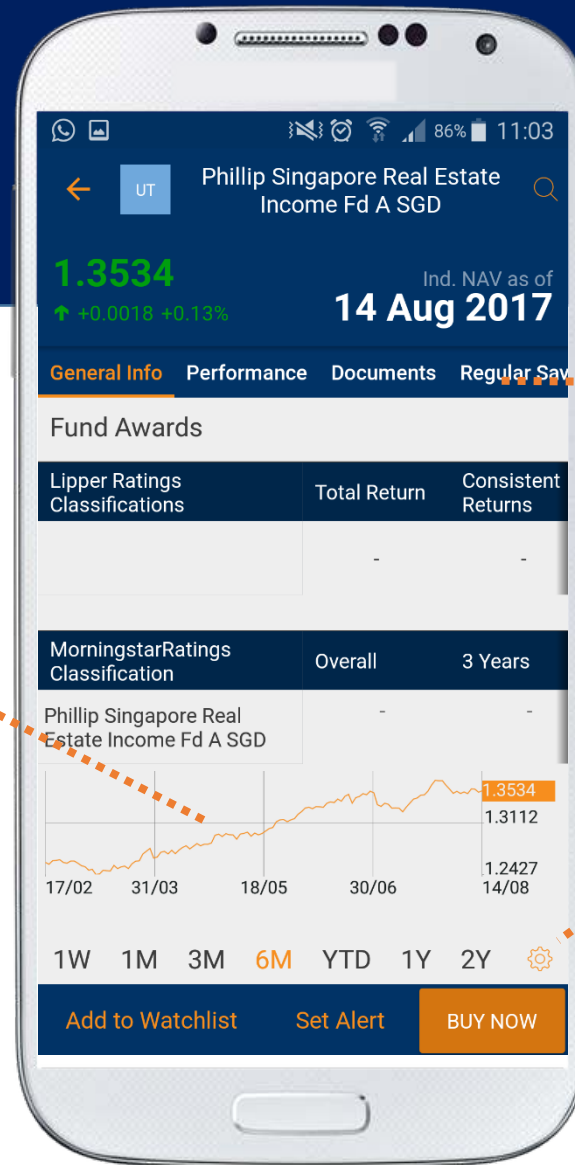
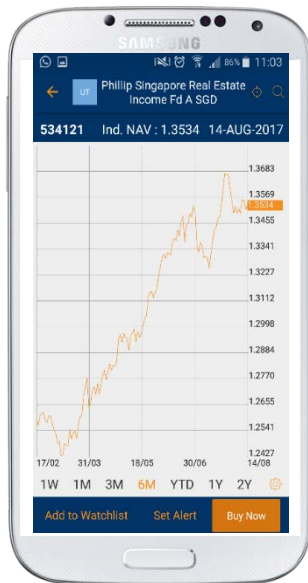
Tap on the names of funds to get the **Fund Information:**



Movable panel: **Scroll left and right** to view more information

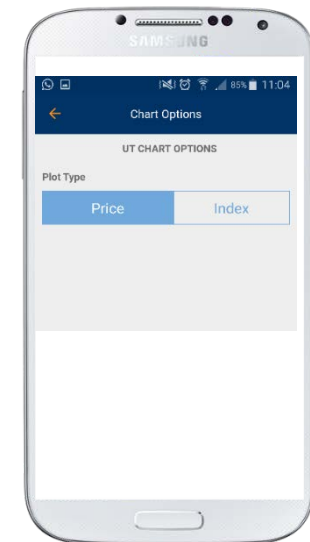
# Fund Details

**Scroll down** on the “General Info” tab to display various details such as historical NAV. Click on the chart to view full screen:



**Tap** on the various headers to toggle between tabs

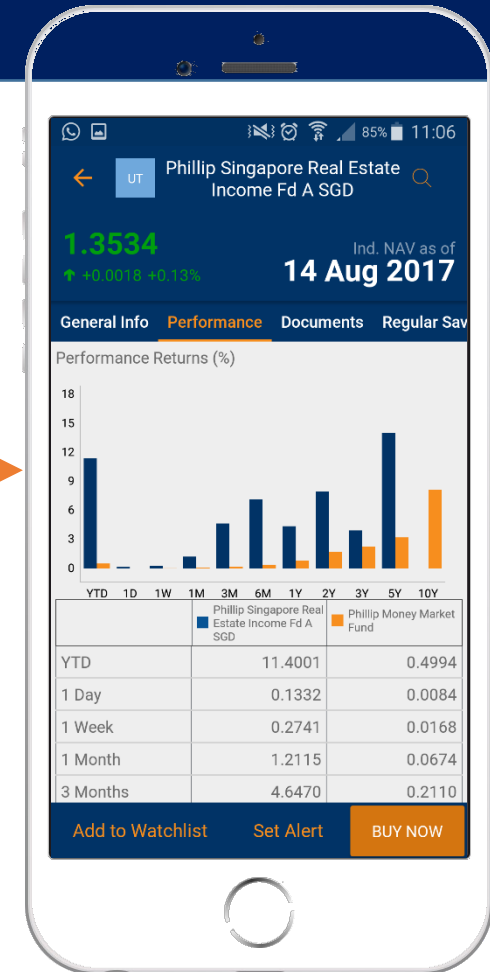
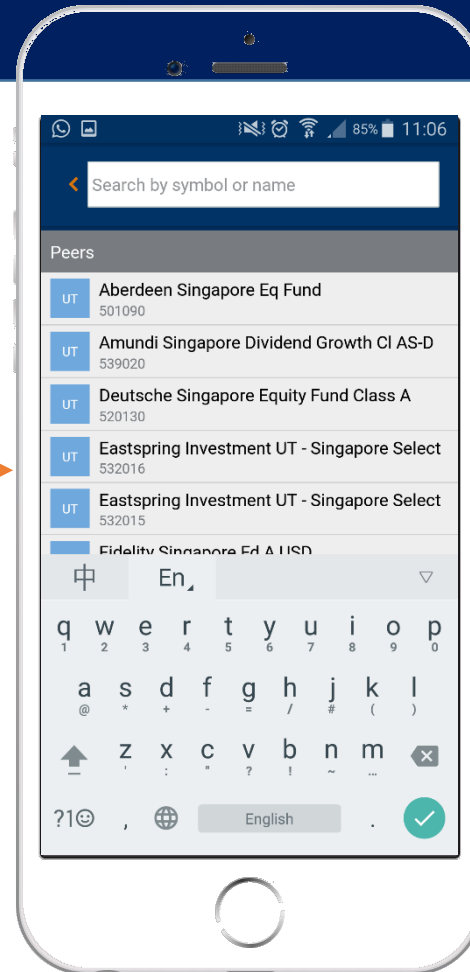
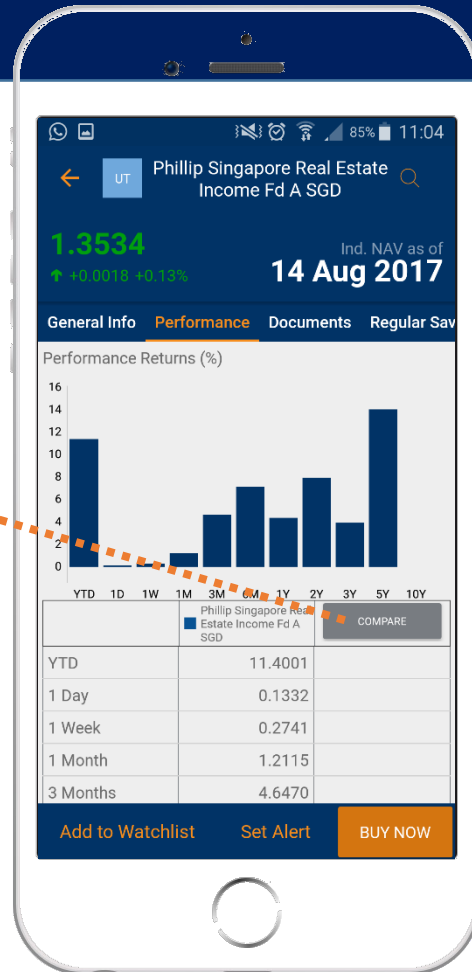
**Tap** on the Settings icon to toggle between “Price” and “Index”:



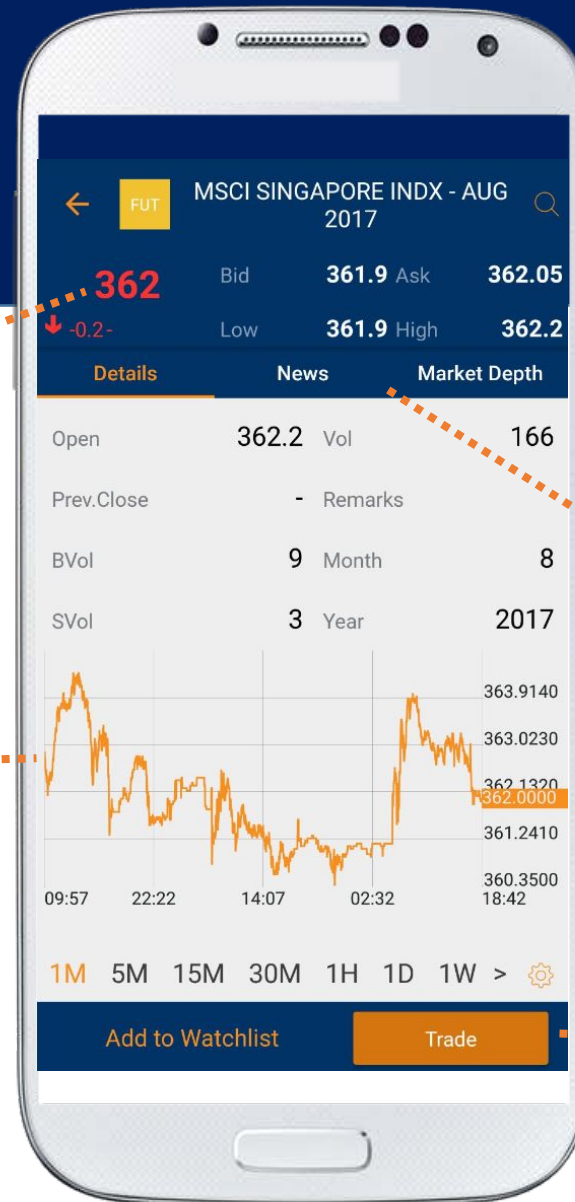


# Fund Details

Tap on "Compare" to search for funds to compare with



# Counter Details Futures



Indicates the Last Done Price (LDP)

**Tap** to view Advanced charting for FUT product

**Tap** to toggle between News and Market Depth

**Tap** to go to Trade screen for FUT product

# Counter Details Forex

Indicates the Last Done  
Price (LDP)

Spread

**Tap** to view Advanced  
charting for FX product



Indicates the Last Offer  
Price (LOP)

**Tap** to toggle between  
News and Charting

**Tap** to go to Trade screen  
for FX product

# Charting

**Swipe Right to Left to**  
pan chart

Volume chart activated  
from Chart Settings

**Swipe Right to Left to**  
select the desired  
Chart Range



**Tap** to activate Crosshair

**Tap** to go to **Chart Settings** to  
select (i) Chart Type or (ii)  
Indicators

# Charting



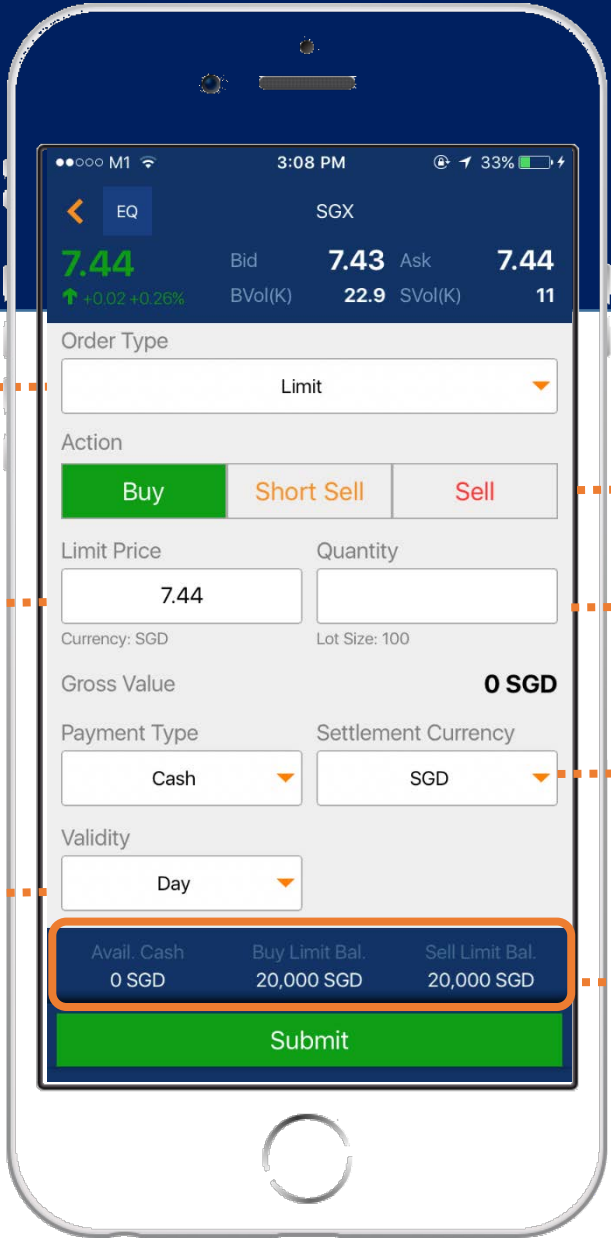
**Rotate** screen to view  
chart in landscape mode



*Note: Please ensure your  
phone orientation setting is  
not locked*



# EQ Trade



Select Order type from the drop down. Advanced Order types are available for selected asset/ EQ exchanges

**Tap** to manually enter desired price

**Tap** to select Validity of this order. Good-till-date (GTD) validities are available for SGX order types

**Tap** to select respective action type  
*Note: Short sell is only available for SGX exchange*

**Tap** to manually enter desired quantity in multiples of the lot size

**Tap** to select Settlement Currency (defaulted to the traded currency)

Your available cash and trading limits shown here

# CFD Trade

Select Order type from the drop down.  
Advanced Order types are available for CFD/ CFD-DMA

DAY/GTD Orders available for selected order types

CFD DMA DBS

20.49 Bid 20.49 Ask 20.5  
 ↓ -0.04 -0.2% BVol(K) 12.4 SVol(K) 16.8

Order Type  
 DMA Stop Limit Order

Action  
 Buy Sell

Stop Price 20.5 Stop Price Trigger Last Done Price

Currency: SGD  
 Limit Price 20.5 Quantity 100

Currency: SGD Lot Size: 100

Gross Contract Value 2,050 SGD  
 Margin Requirement 205 SGD (10%)

Validity

Avail. Cash 0 SGD Credit Limit 200,000 SGD

Submit

Toggle between buy/sell.  
Contract value and margin requirement auto-calculated.

# UT Basket

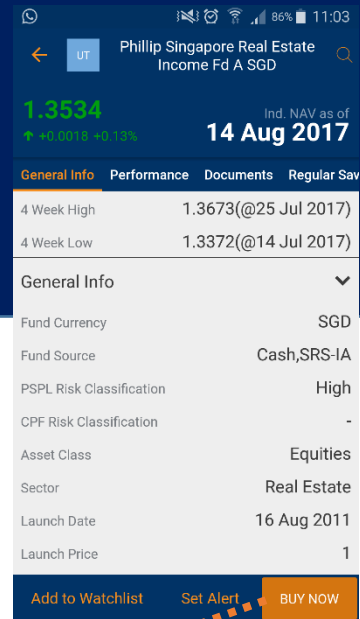
## Either:

Tap on the “Buy Now” icon from Fund Information

## Or:

Tap on the Last/Ind. NAV of a fund

To proceed to **Trade screen**

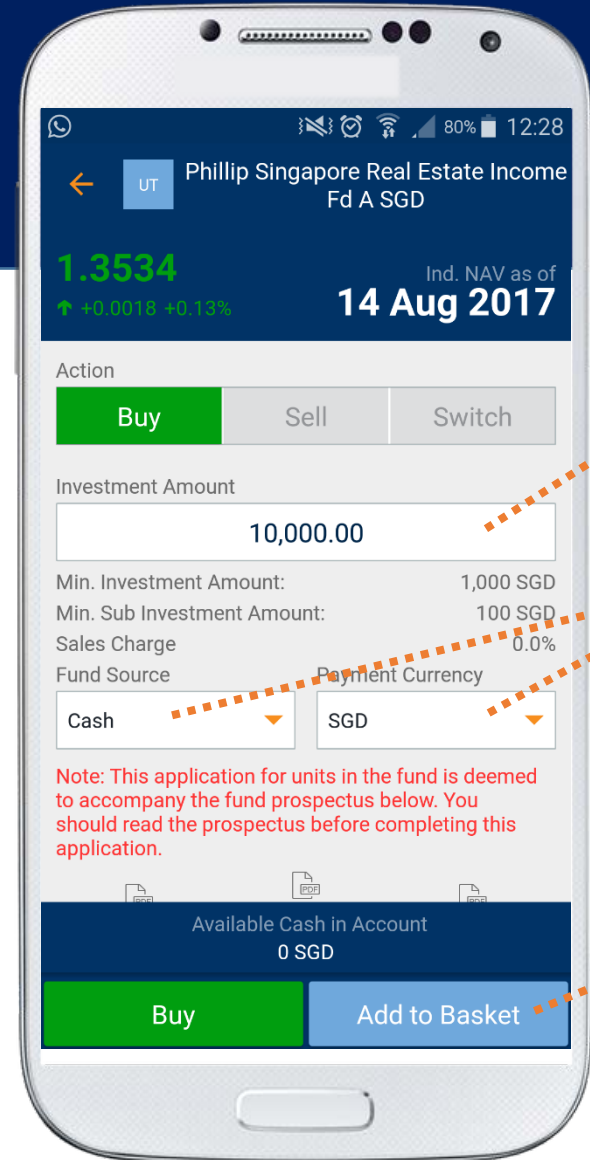


WatchList1

+Add Instrument to Watchlist

Name	Last /Ind.NAV	Change
UT UOB Asia Multi-Asset Monthly Income Scheme SGD (Acc)	1.121 @ 14 Aug 2017	0
UT Phillip Money Market Fund	1.1872 @ 14 Aug 2017	+0.0001
UT AB FCP I - Global Equity Blend Portfolio Class A SGD	24.39 @ 14 Aug 2017	+0.28
EQ *Dominion Energy	77.9	+0.22
UT Phillip Singapore Real Estate Income Fd A SGD	1.3534 @ 14 Aug 2017	+0.0018
UT UOB United SGD Fund CL A (Acc)	1.848 @ 14 Aug 2017	0
UT Phillip Asia Pacific Growth Fund SGD	2.204 @ 14 Aug 2017	0
UT Phillip US Dollar Money Market Fund A	1.0581 @ 14 Aug 2017	0

All Live prices unless marked \* (15 - 30 mins delay)



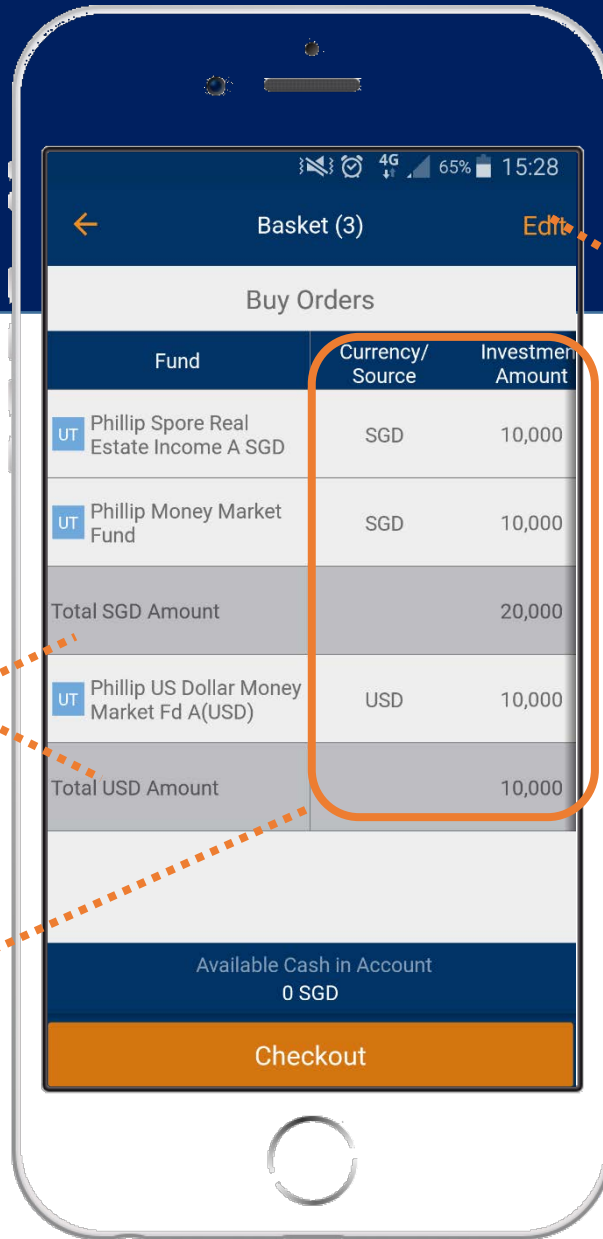
Enter the desired investment amount

Select Fund Source and Currency

Tap on “Add to Basket” to continue shopping for funds before buying



# UT Basket



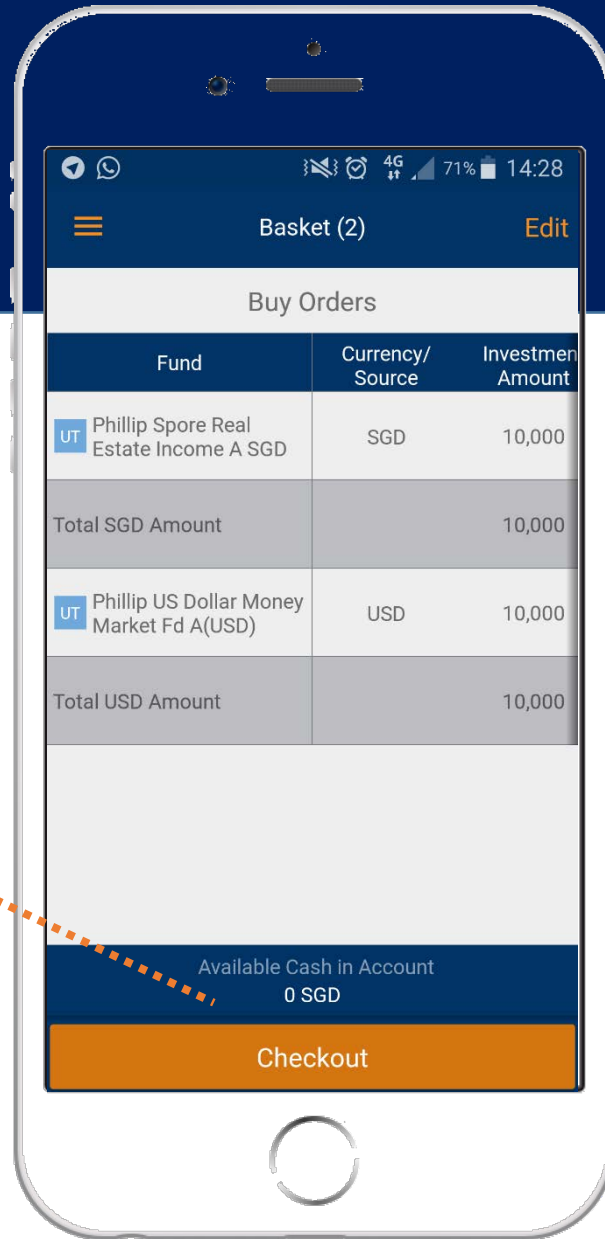
Tap to edit your basket of orders:



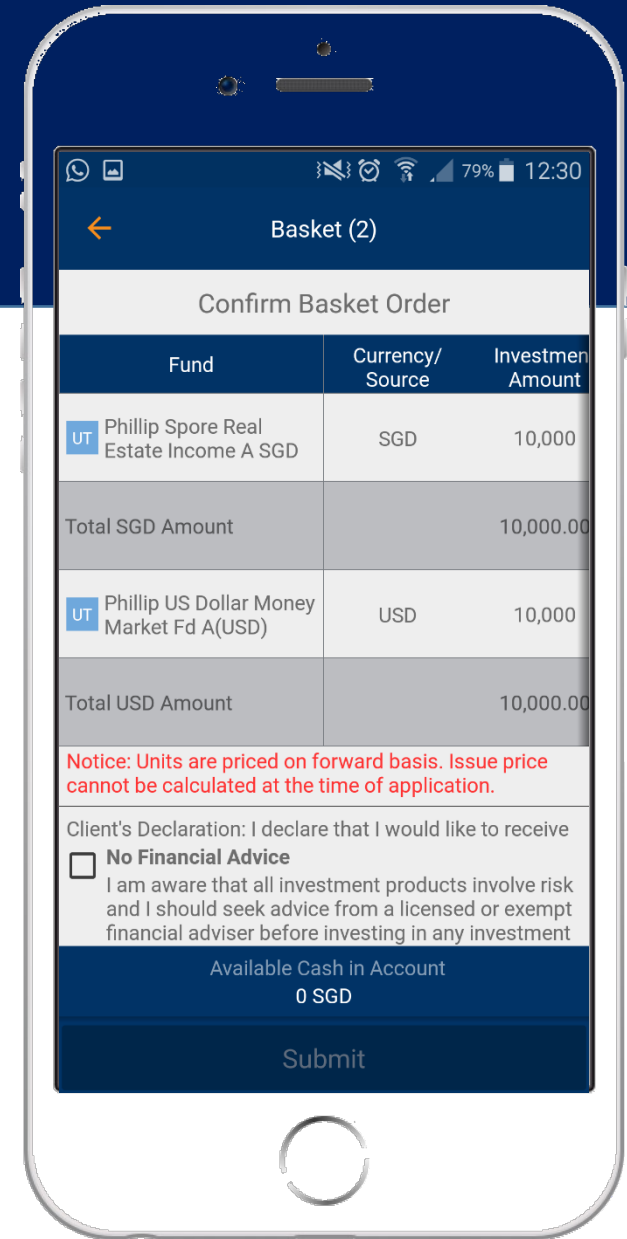
Funds in basket are sorted by payment currency

Movable panel: **Scroll left and right** to view more information

# UT Basket



Tap on "Checkout" to purchase the funds



# Futures Trade

Last Done Price

The Password Confirmation can be turned **ON** or **OFF** in the account settings

← FUT MSCI SINGAPORE INDX - AUG 2017

**364.05** Bid **364.05** Ask **364.15**  
 ↑ +1.5- Low **362.75** High **364.8**

Order Type

Action

Limit Price  Quantity   
 Lot Size:1

Initial Margin **990 SGD**  
 Maintenance Margin **900 SGD**

Validity

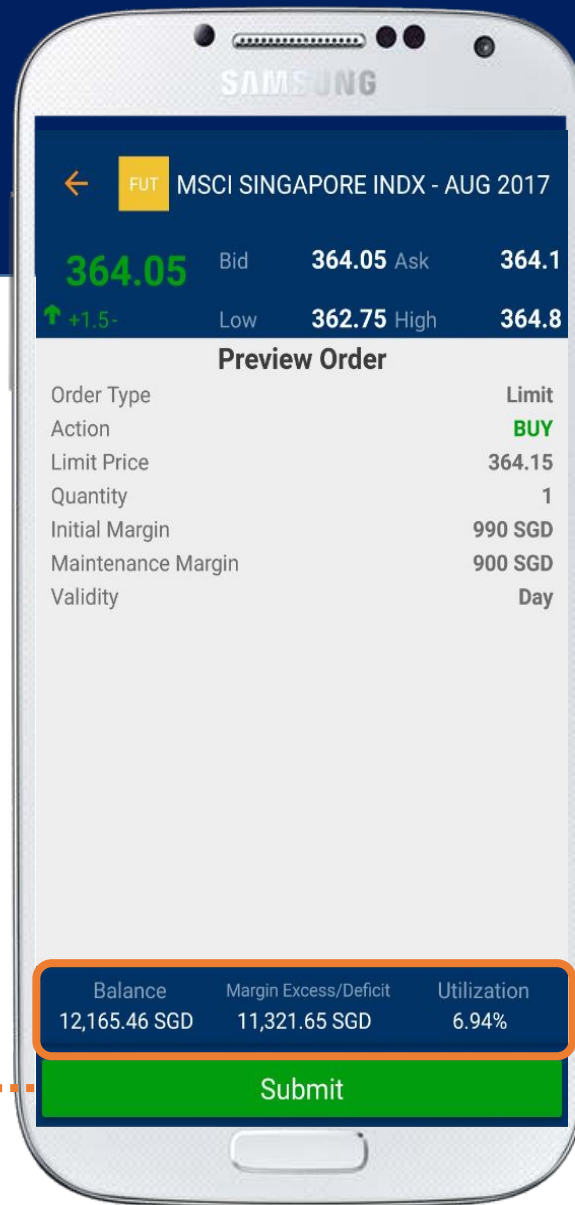
Password Confirmation

Balance	Margin Excess/Deficit	Utilization
12,165.46 SGD	11,321.65 SGD	6.94%

Margin requirements for this trade

Shows the Account Balance, Margin Excess and Margin Utilization

# Futures Trade Preview Order

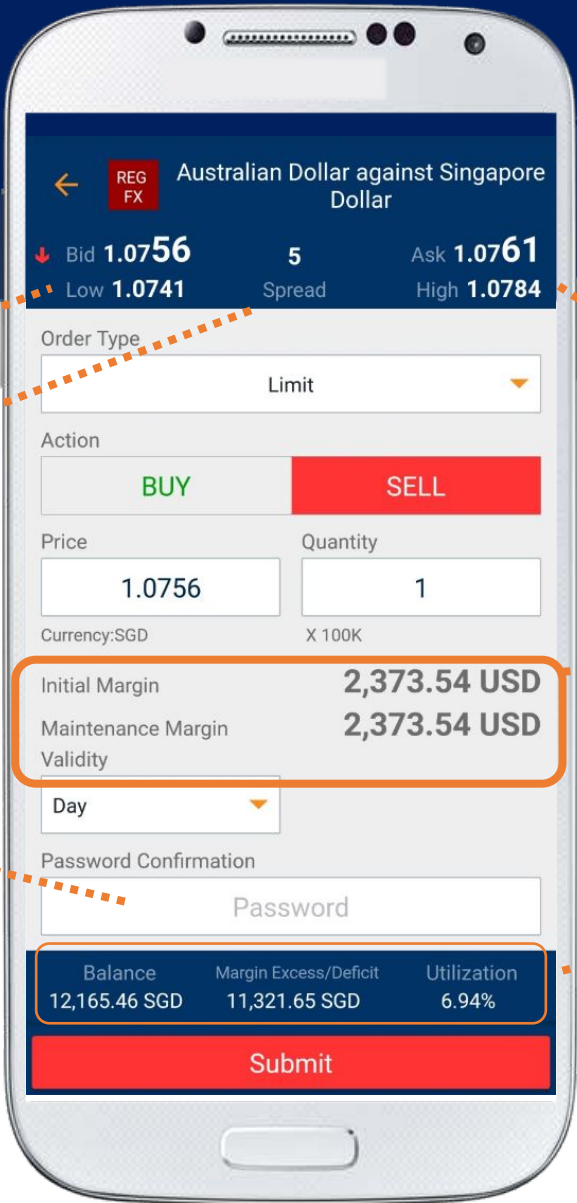


Order Details

Submit order to  
Exchange

Shows the Account  
Balance, Margin Excess  
and Margin Utilization

# Forex Trade



Last Bid Price

Spread

Last Offer Price

Margin requirements for this order

The Password Confirmation can be turned **ON** or **OFF** in the account settings

Shows the Account Balance, Margin Excess and Margin Utilization

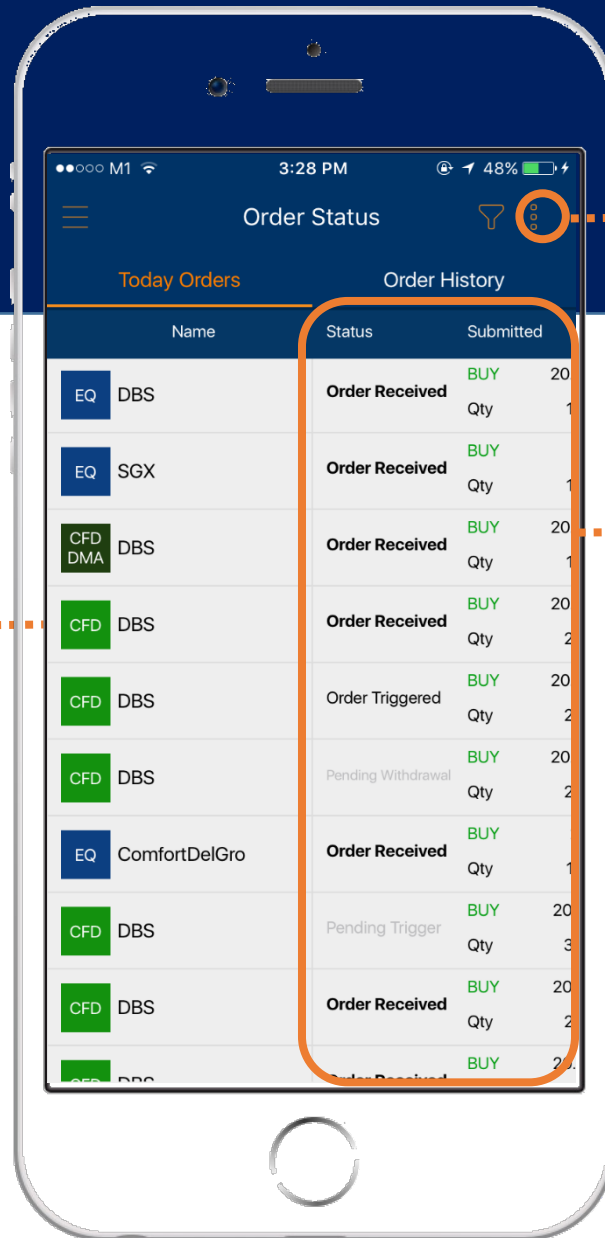
# 7 Order Status Today Orders

All Orders are synchronized with POEMS 2.0

**Tap** to go to Order Details screen.

**Tap and hold** any instrument to display a list of options available:

EQ	SGX
Order Details	
Trade	
Set alerts	
Chart	



**Sort** Order Statuses based on (i) Asset (ii) Status

Movable panel: **Scroll left and right** to view more information

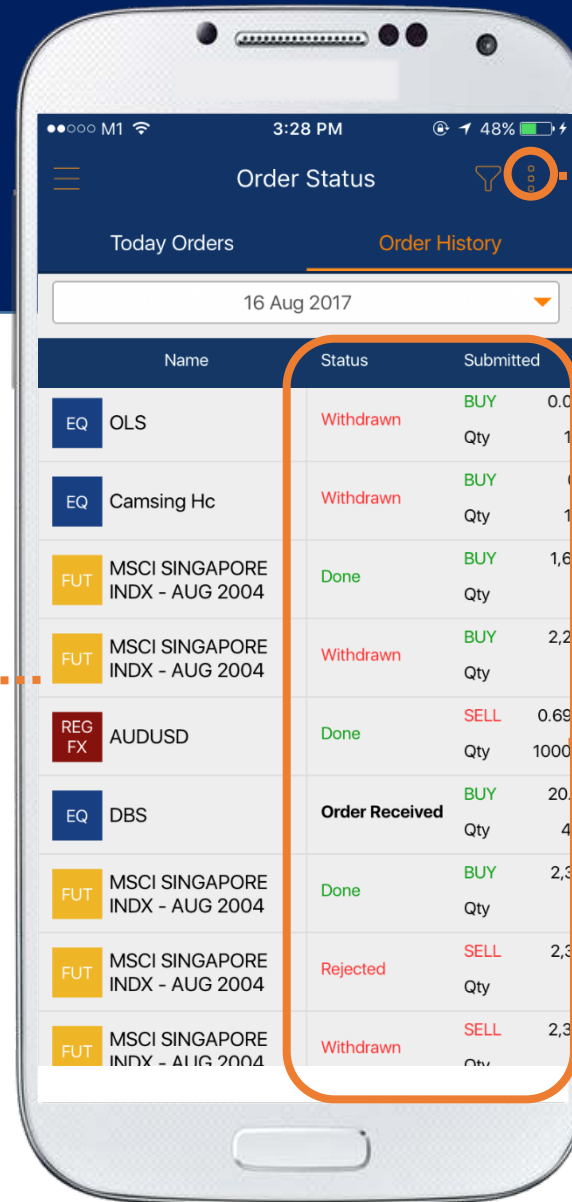
# 7 Order Status Order History

All Orders are synchronized with POEMS 2.0

**Tap** to go to Order Details screen.

**Tap and hold** any instrument to display a list of options available:

EQ	SGX
Order Details	
Trade	
Set alerts	
Chart	



**Sort** Order Statuses based on (i) Asset (ii) Status

Select the history of orders from the past 7 days

Movable panel: **Scroll left and right** to view more information

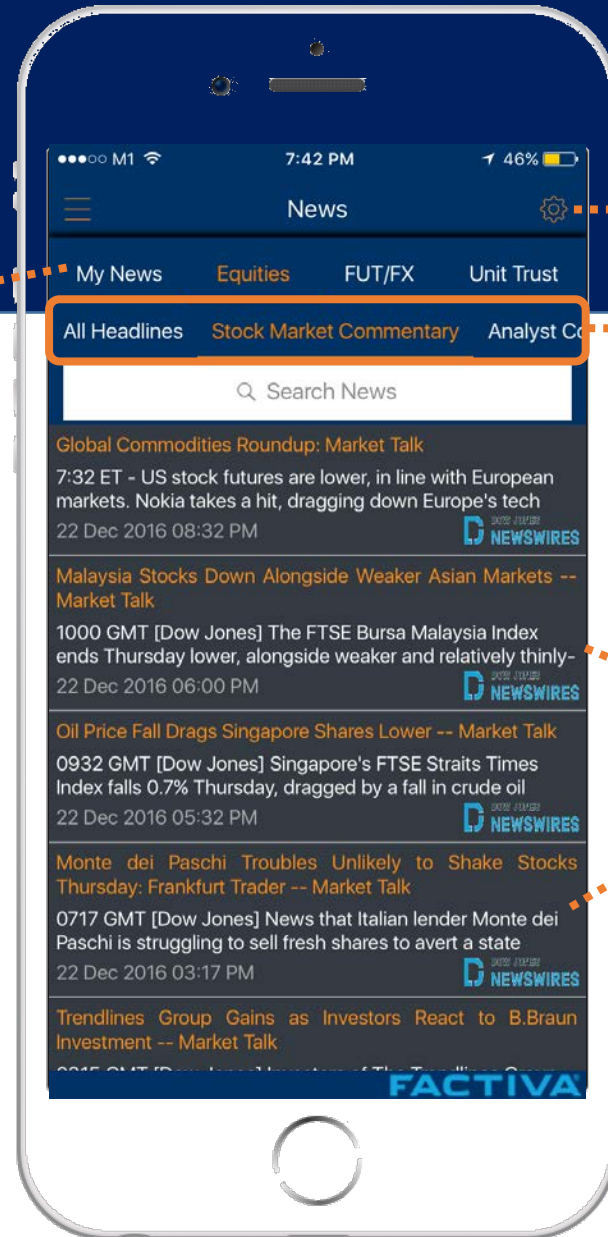


# News

**My News:** Auto-populate the relevant news from the counters on your watchlists

**Scroll up and down** to view more listings;

**Pull list to refresh**



**Tap on icon** to select **News Options**

**Swipe Right to Left** to select the relevant **News Categories**

**Tap on any of the headlines** to view **News Detail**



9a

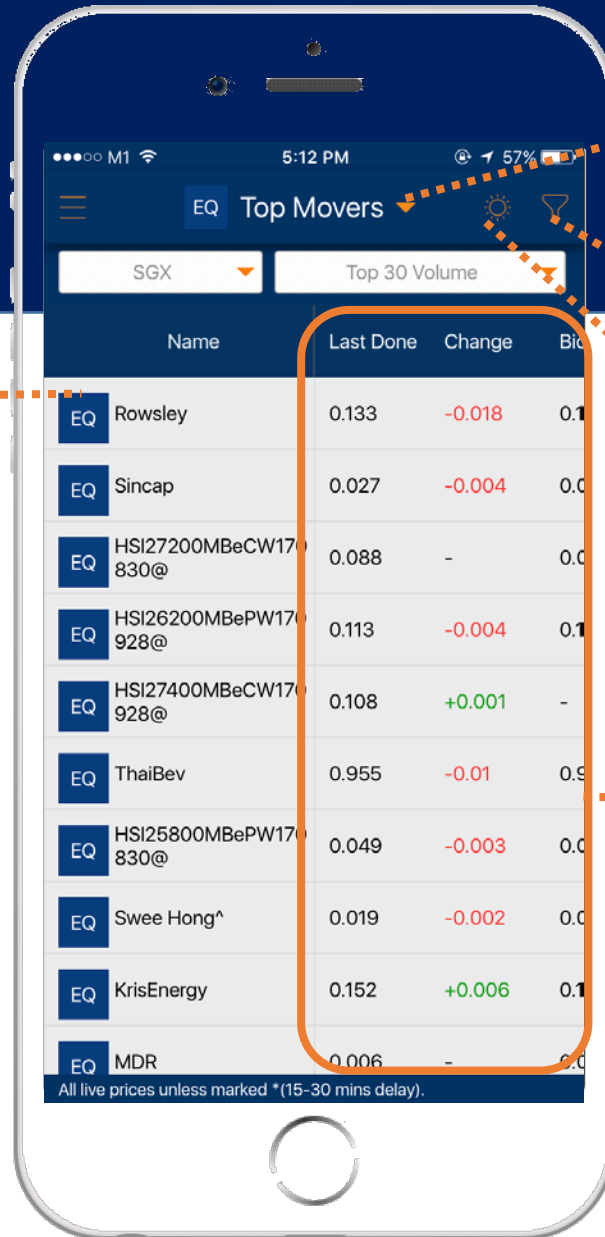
# Top Movers

## EQ

**Tap** on any counter to go to Details screen;

**Tap and Hold** reveal the contextual menu - a list of options available for the instrument :

EQ	Global Logistic
Trade	
Detail	
Chart	
News	
Set Alert	
Stock Analytics	
Market Depth	
Time and Sales	



**Tap** to select Top Movers by Equities or Unit Trust

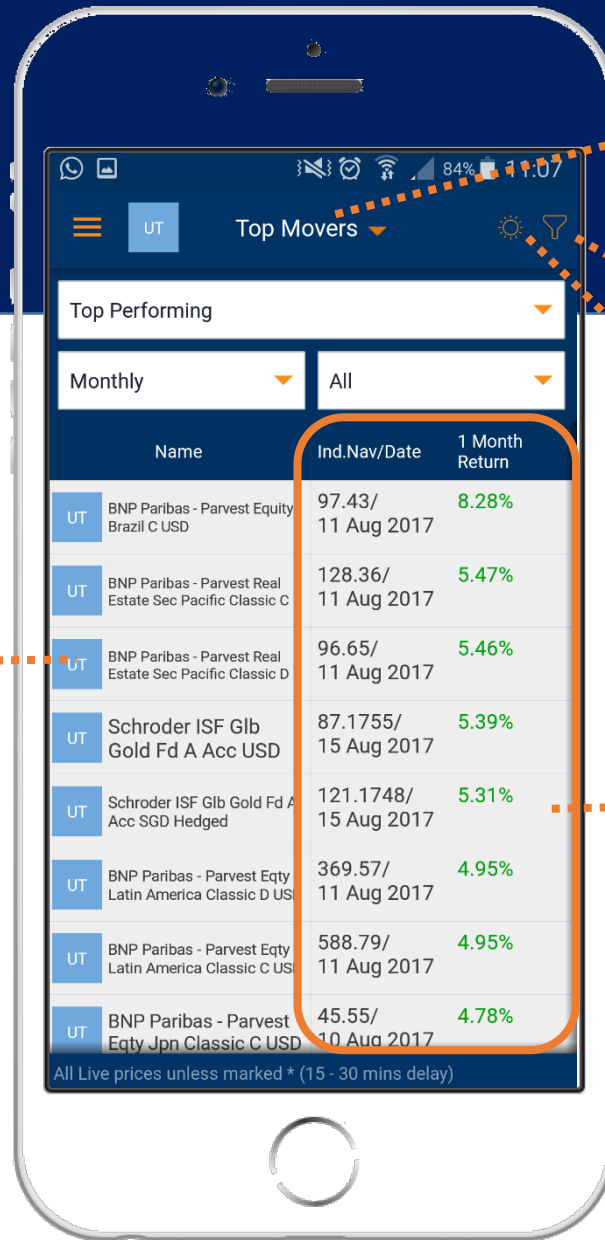
**Filter** your instruments

**Tap** to toggle to Heat Map (next page)

Movable panel: **Scroll left and right** to view more information

9b

# Top Movers UT



**Tap** to select Top Movers by Equities or Unit Trust

**Filter** your instruments

**Tap** to toggle to Heat Map (next page)

**Tap** on any counter to go to the **Fund Information** screen

Movable panel: **Scroll left and right** to view more information

10b

# Top Movers Heat Map



Tap to toggle between heat map or top mover list

Tap to filter counters on this screen

Tap to select sorting by :

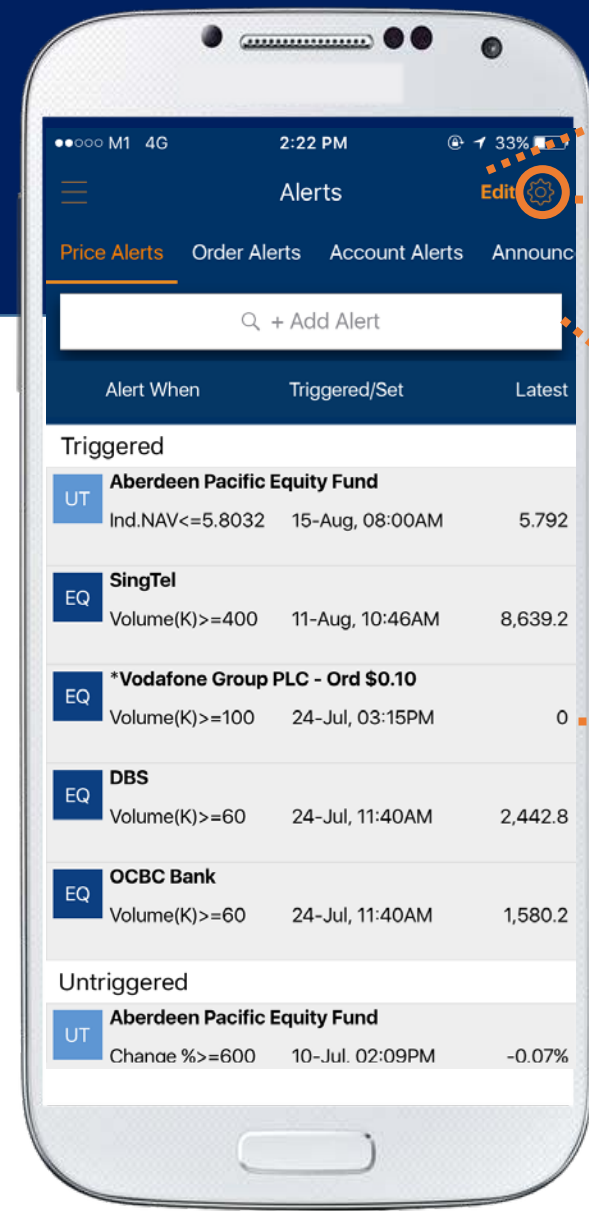
- (1) Price Change % or
- (2) Price Change

Organized from Bearish – Bullish counters

Tap on any counter to go to Counter Details Screen

# Alerts Price Alerts

All Price Alerts are synchronized with POEMS 2.0



Tap here to Edit your alerts

Tap here to go to Alert Options

To add a Price Alert, search for a counter/fund here

Tap and hold any alerts to display a list of options available for the alert :

Displays your list of alerts that have been triggered

Row will coloured if you have yet to "read" the alert

Displays your list of alerts that have yet to be triggered

EQ	Vodafone Group PLC - Ord \$0.10
Trade	
Detail	
Chart	
Edit Alert	
Delete Alert	

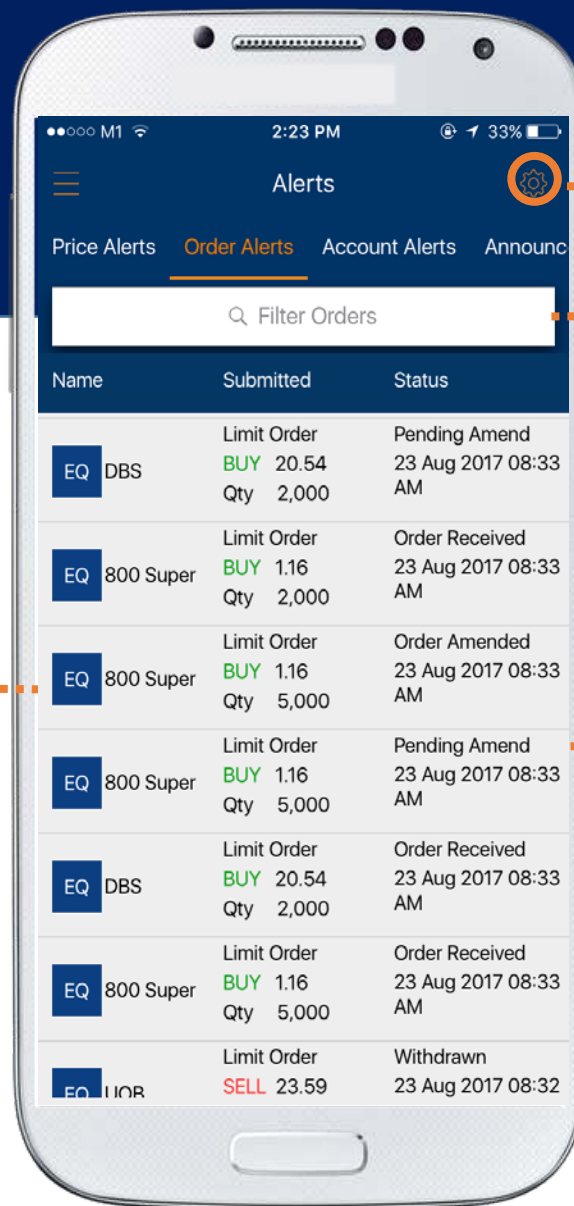
# Alerts

## Order Alerts

All Order Alerts are synchronized with POEMS 2.0

Displays your list of order alerts, latest at the top

Row will be coloured if you have yet to "read" the alert



Tap here to go to Alert Options

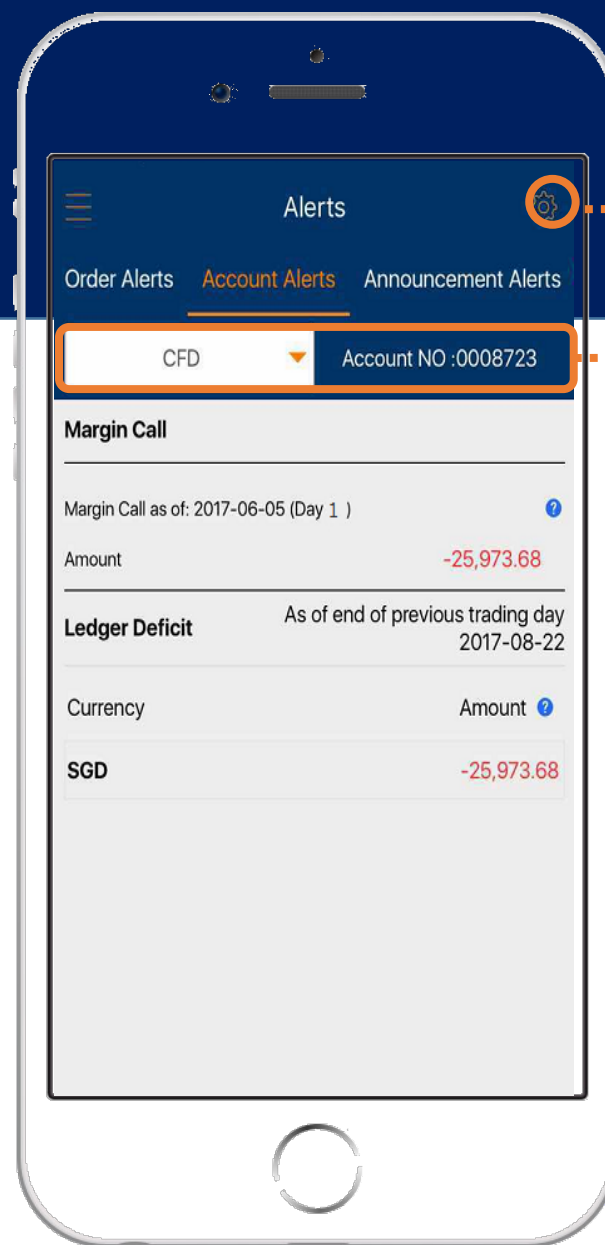
Search / filter your order alerts here

Tap and hold any alerts to display a list of options available for the alert :

EQ	800 Super
Order Status Detail	
Trade	
Chart	

# Alerts

## Account Alerts



Tap here to go to Alert Options

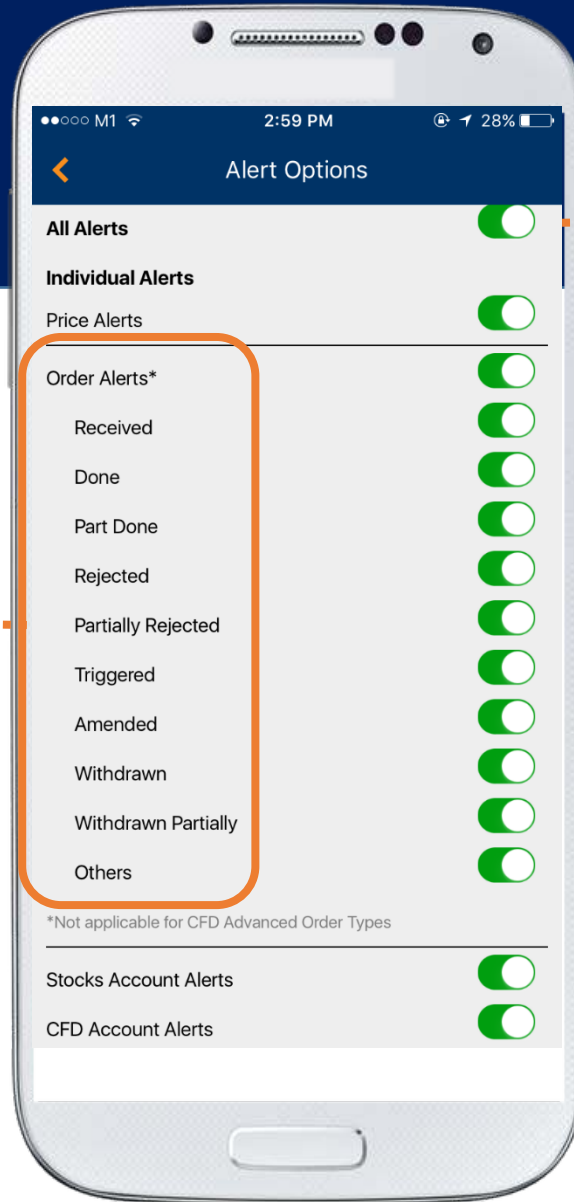
Select asset class / account here

*For Stocks / CFD*  
Margin Calls alerted here

*For Stocks / CFD*  
Ledger deficit updated here

# Alerts

## Alert Options

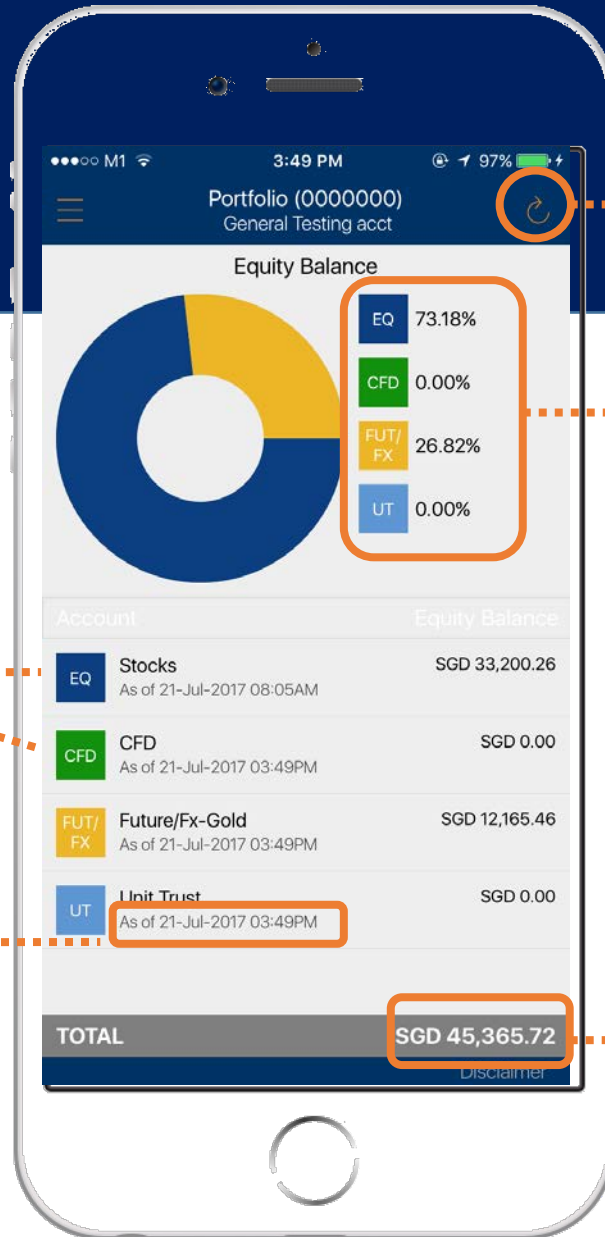


Turn **ON** switch to enable all alert notifications

Turn **ON** the respective switches based on your order statuses



# Account Mgmt Portfolio



Tap to refresh latest equity balances

Breakdown of your % equity balance by asset class

Note: Pie chart will only display asset class with **positive** equity balances

Tap on the respective accounts to go into account details

Time stamp shows the updates for respective account's balances

Shows your Net total equity balance



# Account Mgmt

## EQ Account Details

The image shows a smartphone screen displaying the 'EQ Account Details' page. At the top, it shows 'EQ Stocks (0526919) OH \*\*\*20WY7'. Below this, there are two tabs: 'Account Details' (selected) and 'Holdings'. A table lists various account items with their values in two columns: 'SGDBase' and 'SGD'. A blue-bordered panel is overlaid on the right side of the table, containing a dropdown menu for selecting a currency. An orange dashed line points from the text 'Tap to select account tagged to you' to the top of this panel. Another orange dashed line points from the text 'Tap on the respective descriptors to reveal explanation at bottom of screen' to the 'Available Balance (a+b) + (c)' row in the table. A third orange dashed line points from the text 'Movable panel: Scroll left and right to view available currencies for this account' to the blue-bordered panel. A fourth orange dashed line points from the text 'First column <SGDBase> shows amount converted to SGD currency' to the 'SGDBase' column header.

Description	SGDBase	SGD
Balance as of yesterday (a)	97,532.3476	97,130.95
Fund received today (b)	270	270
Opening Balance today (a+b)	97,802.35	97,400.9
Items due for settlement (c)	-2,407.76	-2,407.76
Available Balance (a+b) + (c)	95,394.5876	94,993.1
All Items Outstanding (d)	-8,044.66	-8,044.6
Net Amount (a+b) + (d)	89,757.6876	89,356.2
Total Asset Value (Close)	916,961.8654	916,961.8

Last Updated: 05-Apr-2017 07:15AM

Tap to select account tagged to you

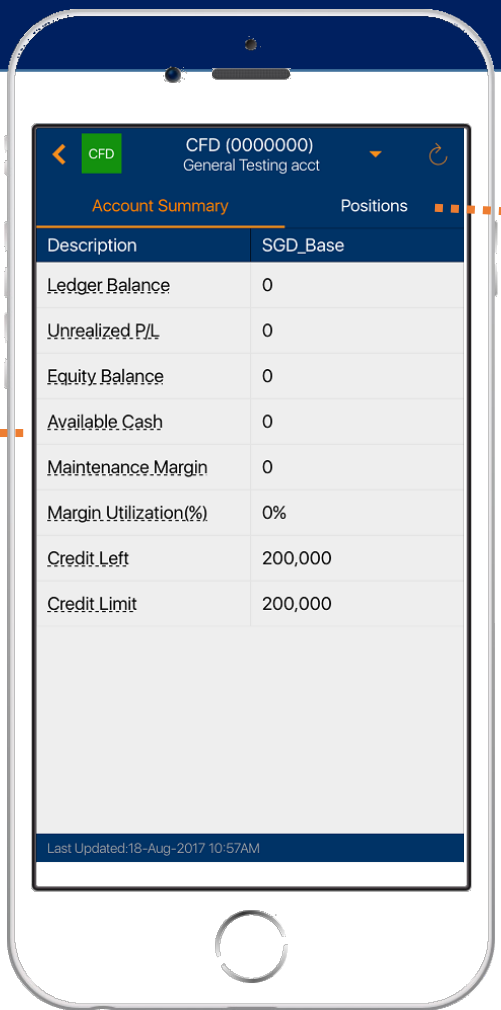
Tap on the respective descriptors to reveal explanation at bottom of screen

Movable panel: **Scroll left and right** to view available currencies for this account

First column **<SGDBase>** shows amount converted to SGD currency

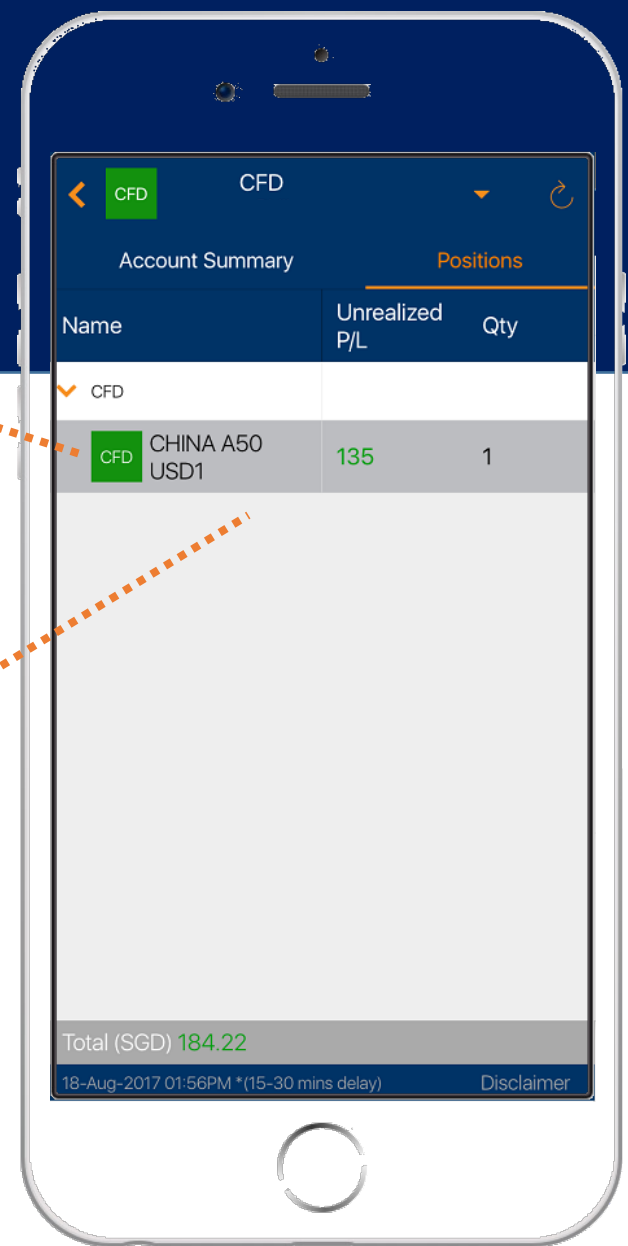
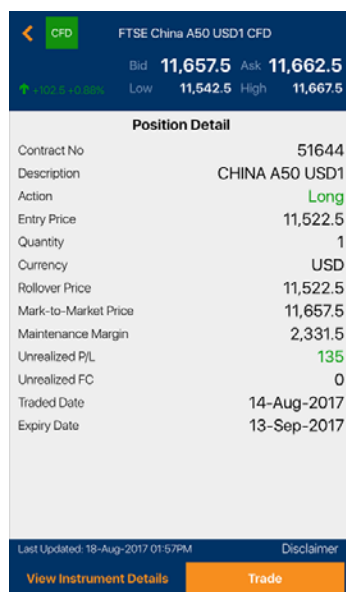
# Account Mgmt CFD Account Details

Real-time Account Summary



Real-time CFD Positions

Tap to view contract details



# Account Mgmt

## EQ Holdings

<Name> column shows the list of instruments traded grouped by currencies.

Tap on any instrument to go to Holding Details screen

Name	Unrealized P/L	Qty
EQ SUPER GROUP	-14,702.259	9,000
EQ ACCORDIA GOLF TR	-177,699	3,000
EQ AIMSAMP CAP REIT	2,420.51	51,100
EQ ASCENDAS-HTRUST	2,073.55	25,000
EQ ASIAN PAY TV TR	-2,940.5	13,000
EQ CACHE LOG TRUST	-178.19	3,000
EQ CDL HTRUST	1,370.47	5,000
EQ GROESUS RTRUST	3,118.77	10,000
Total (SGD)		76,062.249

Tap to select account tagged to you

Movable panel: Scroll left and right to view available currencies for this account

Shows your Total Holdings amount in SGD as of Last updated timestamp

# Account Mgmt

## EQ Outstanding Positions

Each row shows the instrument traded grouped by contract due date.

Tap on any instrument to go to Position Details

Name	Amount Due
Due: 13-Aug-2001	
EQ MEDIARING	5,773.11 SGD
Subtotal (SGD) : 5,773.11	
Due: 14-Aug-2001	
EQ ENZER	7,962.92 SGD
Subtotal (SGD) : 7,962.92	
Due: 15-Aug-2001	
EQ DATACRFT	6,458.25 SGD
Subtotal (SGD) : 6,458.25	
Due: 16-Aug-2001	
EQ NATBROADWAY	7,196.49 SGD

Tap to select account tagged to you

This is the amount that is due for settlement on the "due date"

# Account Mgmt Transaction History

**Tap** to select available currencies for this account

Shows the debit / credit amount following the transaction

Date	Description	Debit/Credit	Balance
01-Jul-2017	TRADING ACCOUNT BALANCE B/F SGD	0.00	0
11-Jul-2017	TRADING ACCOUNT BALANCE C/F SGD	0.00	0
	MMF Unit 2,312.2403 @ 1.1863	0.00	2,743.01
	Ledger inclusive of MMF value	0.00	2,743.01

Last Updated : 12-Jul-2017 03:00AM

**Tap** to select account tagged to you

**Tap** to select the transactions by month (transaction history is available up to the past 6 months)

Shows your available balance following the transaction

# Online Forms Withdrawal

The following actions are available:

1. Deposit to DBS / POSB Bank
2. Cheque Deposit
3. Collect Cheque
4. Telegraphic Transfer
5. Transfer into a pre-designated account
6. Redeem POEMS Reward

The screenshot shows the 'Online Forms' screen with the 'Withdrawal' tab selected. The form includes the following fields and options:

- Amount to be Transferred:** Currency dropdown set to 'SGD'.
- Action:** Dropdown menu set to 'Deposit to DBS/POSB Bank Account 512-04990-7'.
- Value \ Process Date:** Date field set to '24 Aug 2017' with a calendar icon.
- Remarks:** Text input field.
- Password:** Password input field.
- Submit:** Orange button at the bottom.

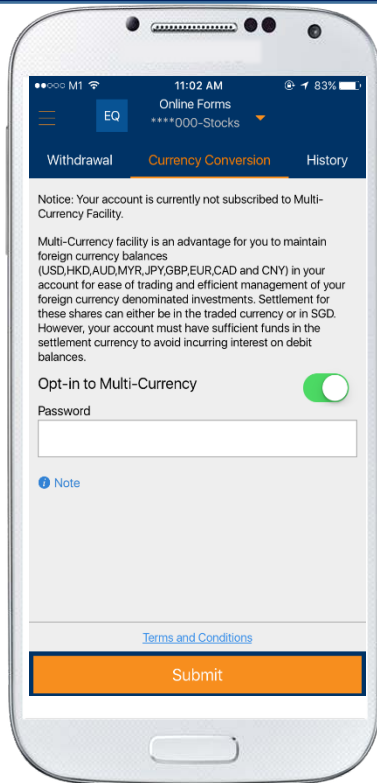
Select the desired currency and the withdrawal amount

Select the date to process this request

Enter any applicable remarks

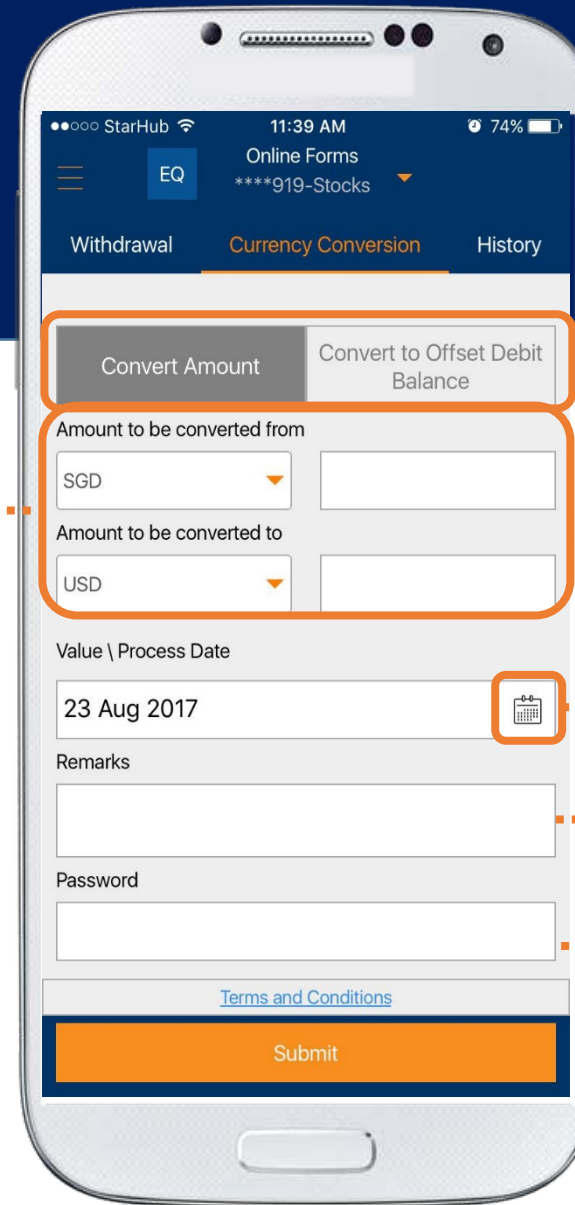
Enter your password to proceed

# Online Forms Currency Conversion



POEMS offers **multi-currency facility**. If you are not opted in to multi-currency: You can submit an “Opt-in” request in-app

Select the desired currency and the withdrawal amount



Select conversion action

Select the date to process this request

Enter any applicable remarks

Enter your password to proceed

# FXInvest Rates

Edit and save up to 5  
FXInvest watchlists

Tap on respective **Bid**  
and **Offer** prices to  
select your currency  
conversion

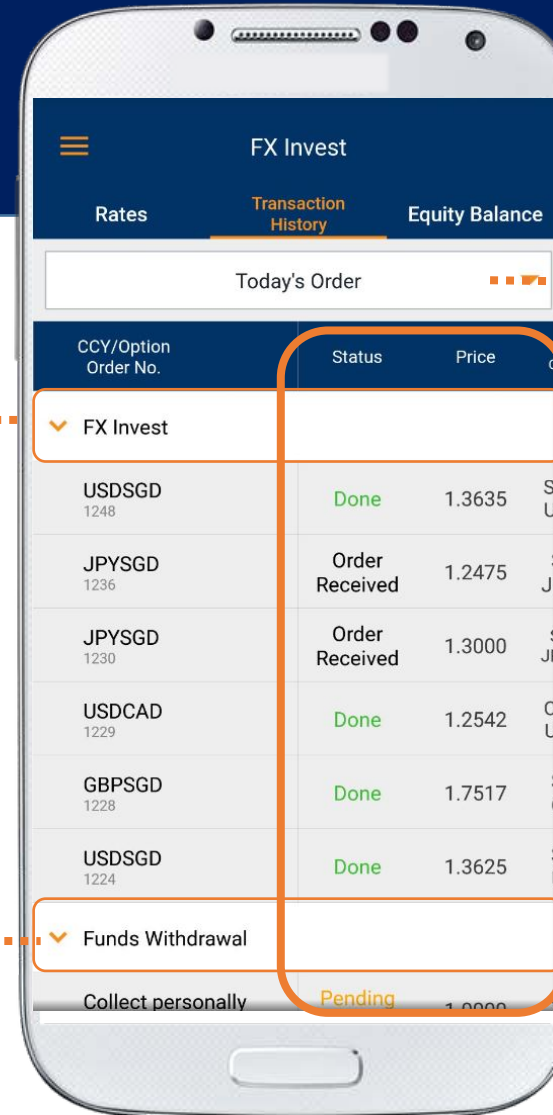
Currency Pair		Bid	Offer	High
JPY	SGD	1.2453	1.2493	1.247
USD	CNH	6.6649	6.6689	6.670
AUD	NZD	1.0833	1.0873	1.083
AUD	JPY	86.16	86.56	86.7
GBP	SGD	1.7454	1.7494	1.754
USD	SGD	1.3609	1.3639	1.367

Movable panel: **Scroll**  
**left/right** to view more  
details



# FXInvest

## Transaction History



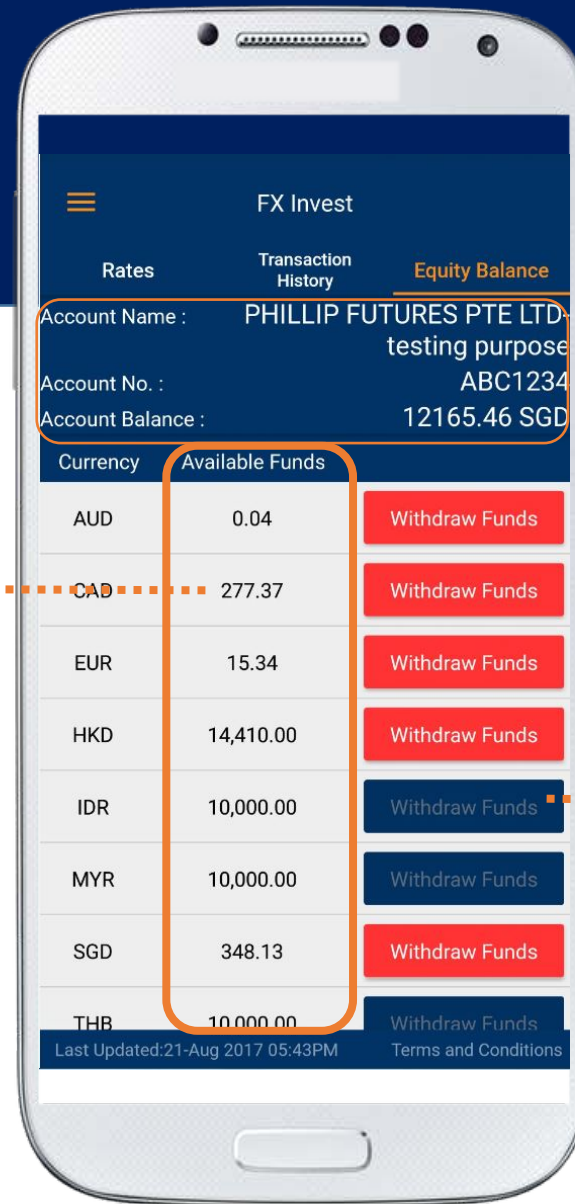
Toggle to expand/collapse  
FXInvest transactions

Toggle to expand/collapse  
Fund Withdrawal  
transactions

Tap to toggle between  
different historical  
periods

Movable panel: **Scroll  
left/right** to view more  
details

# FXInvest Equity Balance



Available Funds are specific to your Futures trading account

**Scroll down** to view more currencies

Full Account details can be found under Portfolio

**Zero funds** or Restricted currencies will be greyed out and are non-withdrawable

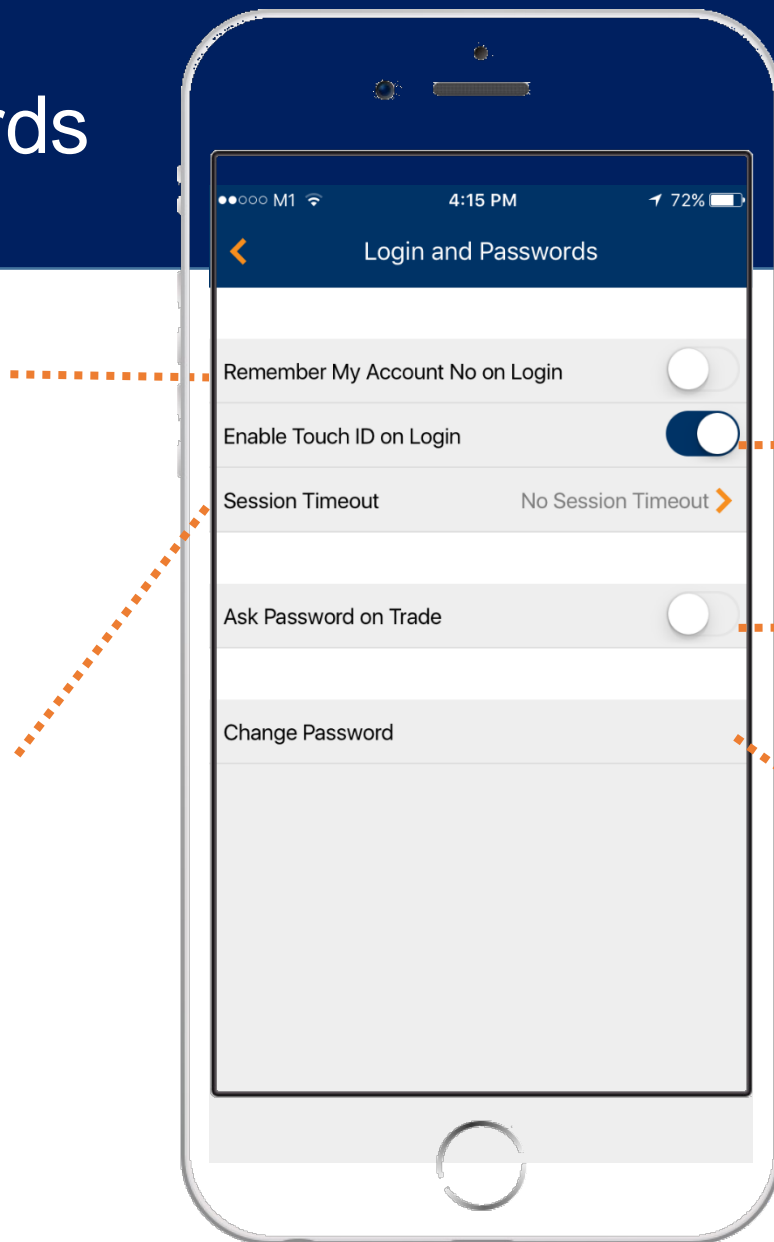
# Settings

## Login and Passwords

**Turn ON** for the app to remember your account number at login

Select desired period for app to “log” you out in

- (1) 30 mins
- (2) 1 hour
- (3) 2 hour
- (4) 4 hours
- (5) No session timeout



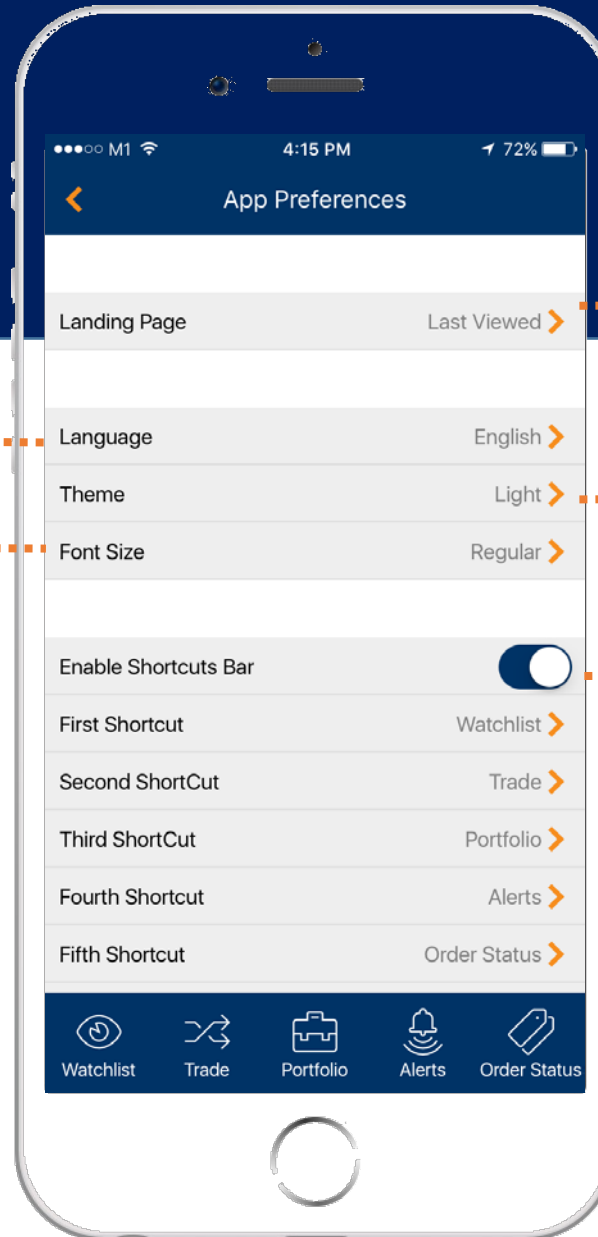
For iOS only: **Turn ON** to use Touch ID for login

**Turn ON** if you would like the app to prompt you for your password at every Trade screen

Change your password here

# Settings

## App Preferences



Choose your first landing screen every time you log into

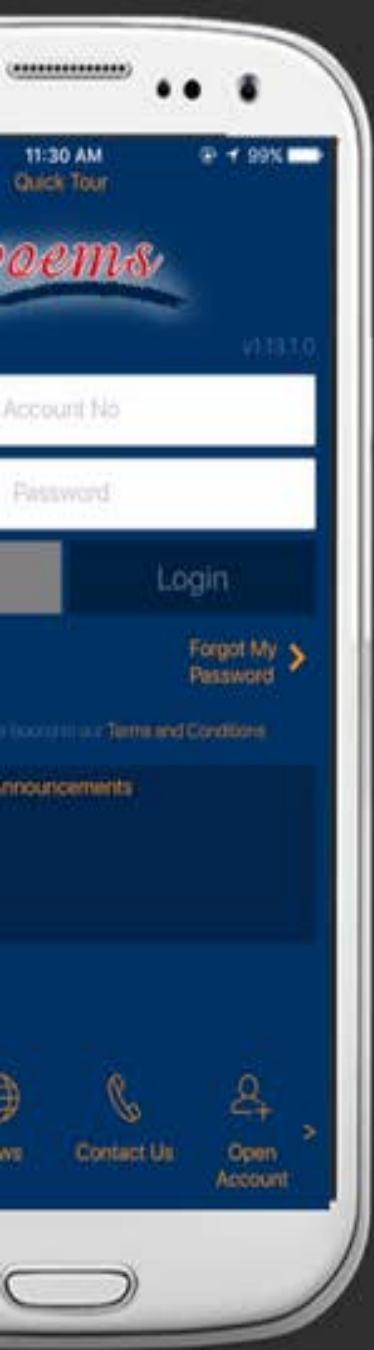
Select app language

Select font size in  
(i) Regular or (ii) Large

Choose theme available from  
(i) Dark or (ii) Light Skin

**Turn ON** to enable the Shortcuts bar at the bottom of the app

You can **customize** up to 5 shortcut at the bottom panel



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