

iOCBC User Guide (Web)

22 May 2023



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FORGOT PASSWORD | Reset Password



1 Click on [Trouble logging in?](#) at the bottom of the login page to reset password



FORGOT PASSWORD | Reset Password



2 Enter your **Username**

3 Enter the characters that appear in the **Captcha**

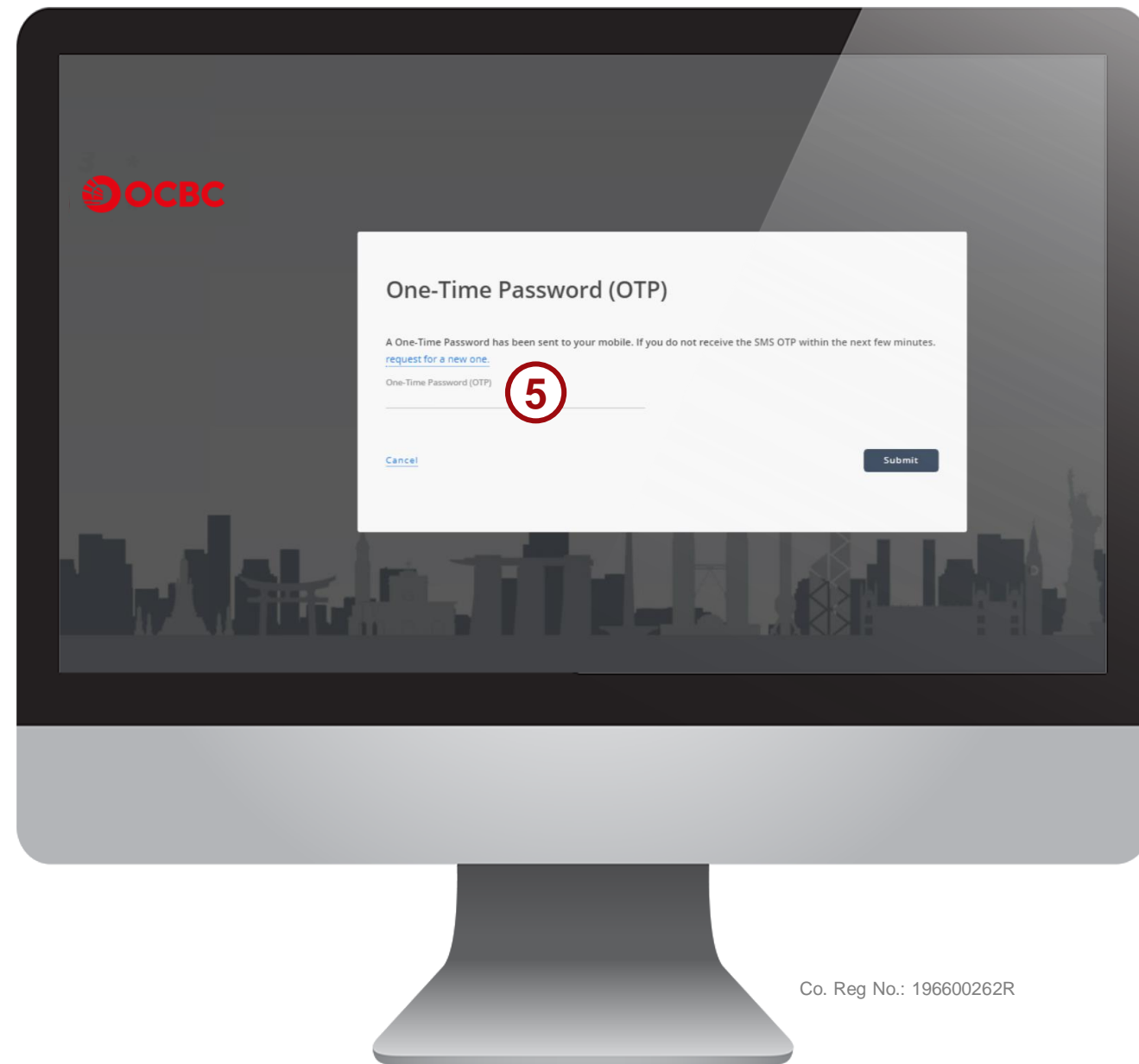
4 Click **Submit**



FORGOT PASSWORD | Reset Password



5 Enter the **One-Time Password** sent to your registered mobile phone and Click **Submit**



FORGOT PASSWORD | Reset Password



6 Alternatively, Enter the **One-Time Password** generated on your Hardware Token and Click **Submit**

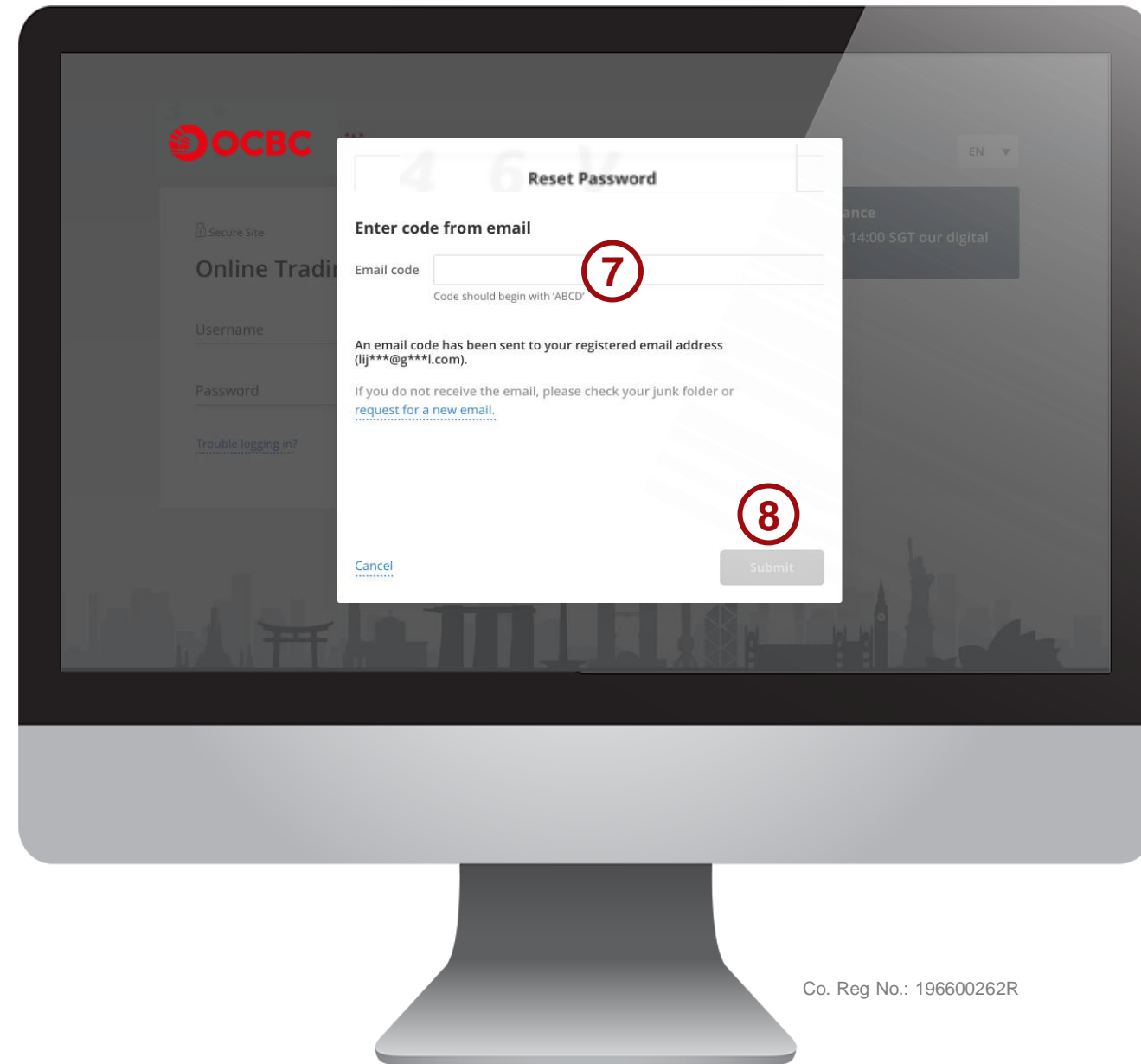


FORGOT PASSWORD | Reset Password



7 Enter the **Email Code** which was sent to your registered email address

8 Click **Submit**



FORGOT PASSWORD | Reset Password



9 Enter **New Password**

10 **Repeat New Password**

11 Click **Submit**

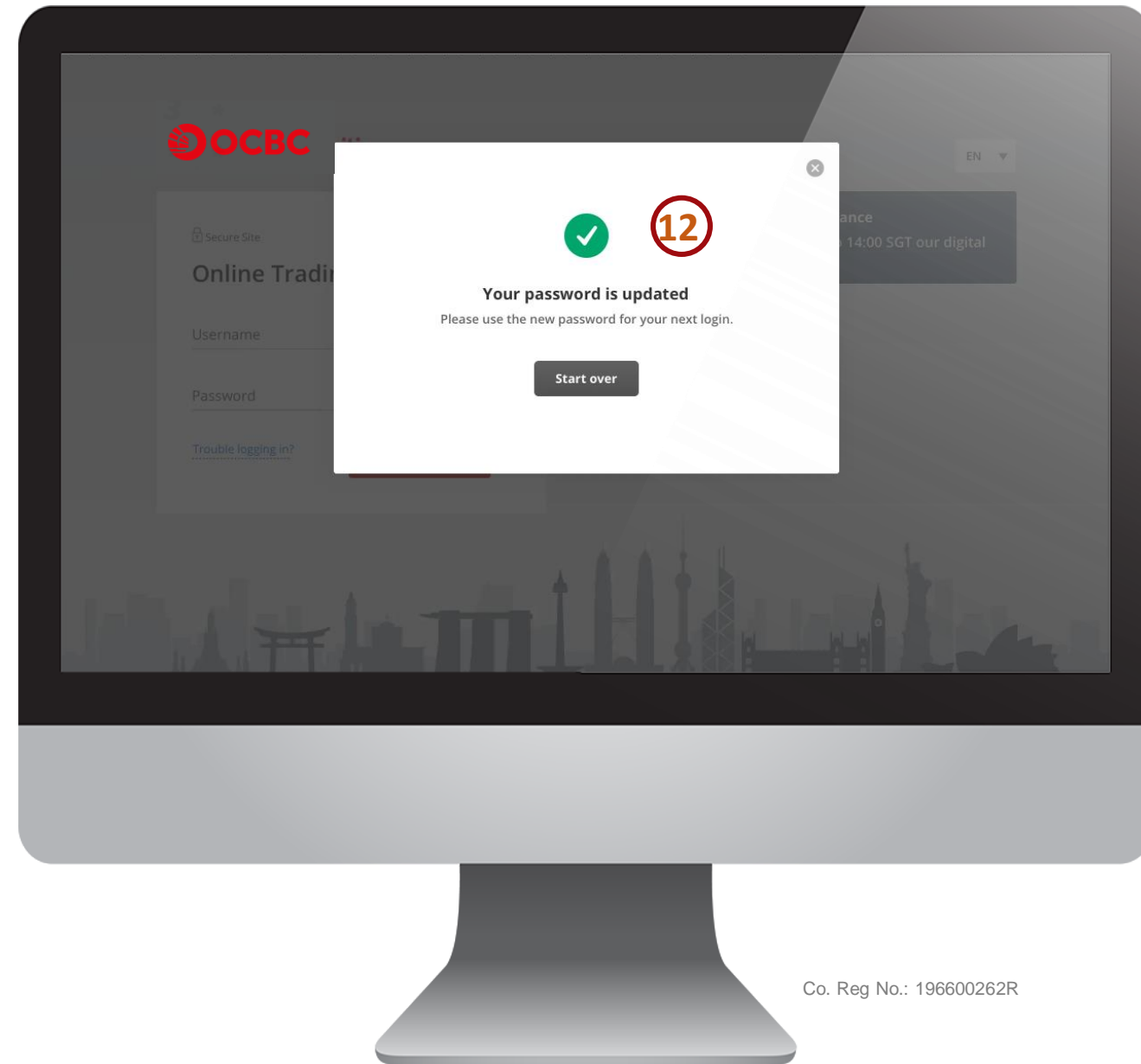
A computer monitor displaying the OCBC password reset form. The form is titled 'Please enter a new password' and features two input fields: 'New password' and 'Repeat new password'. The 'New password' field is marked with a red circle containing the number 9. The 'Repeat new password' field is marked with a red circle containing the number 10. Below the 'New password' field, there is a note: 'Must be 8 to 15 characters, including a number (0-9), an uppercase (A-Z), a lowercase (a-z). Do not use special characters (e.g. #@-).' At the bottom left of the form is a 'Cancel' link, and at the bottom right is a 'Submit' button. The number 11 is marked next to the 'Submit' button. The OCBC logo is visible in the top left corner of the form. The background of the monitor shows a city skyline.

FORGOT PASSWORD | Reset Password



12 Password is now updated. You may use the new password for your next log in.

Note: If you have OneLook/ OneTouch setup, it would be disabled once you have reset the password.



LOG IN | View your last login date and time



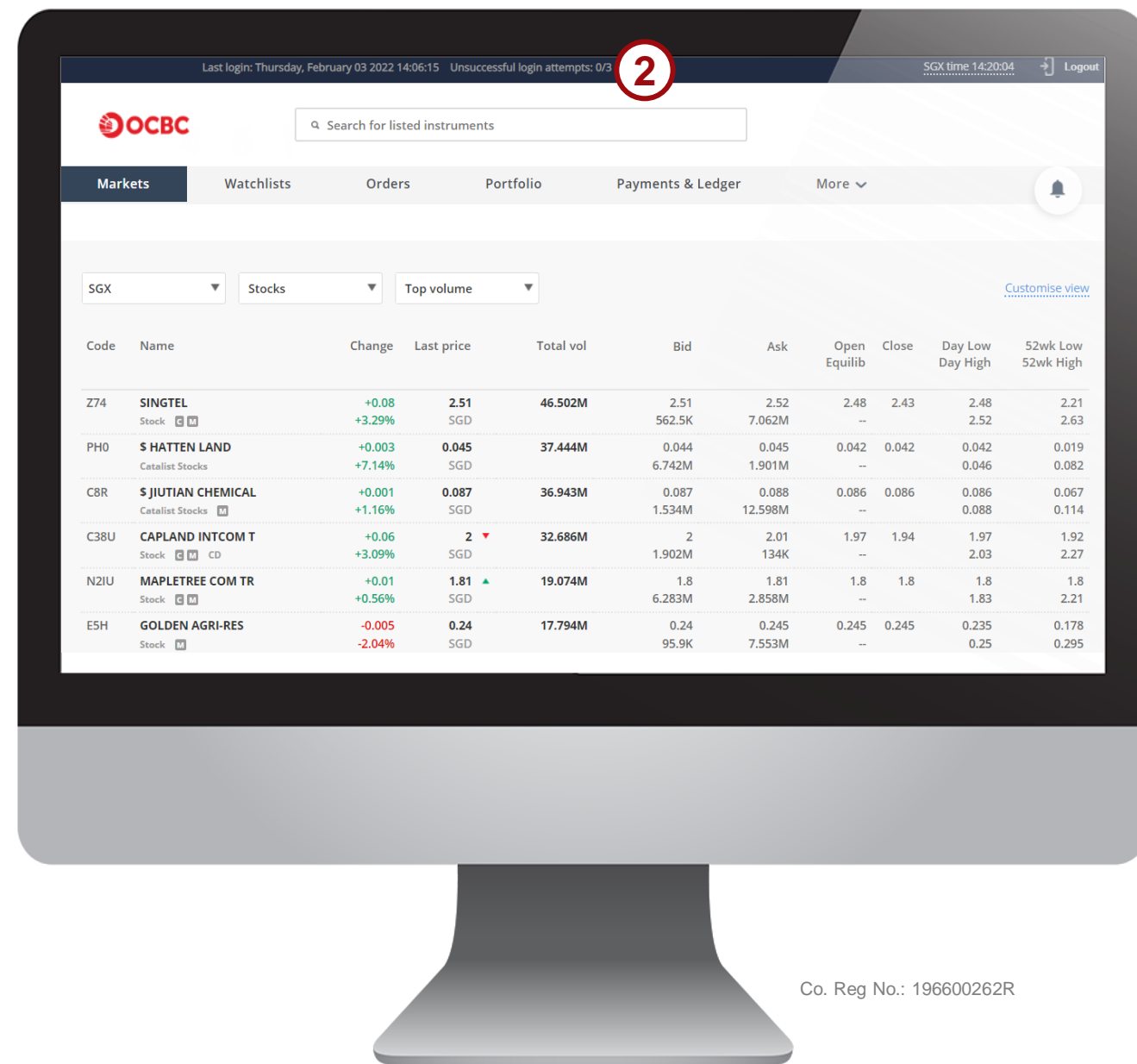
1 Log in via your login ID and password



LOG IN | View your last login date and time



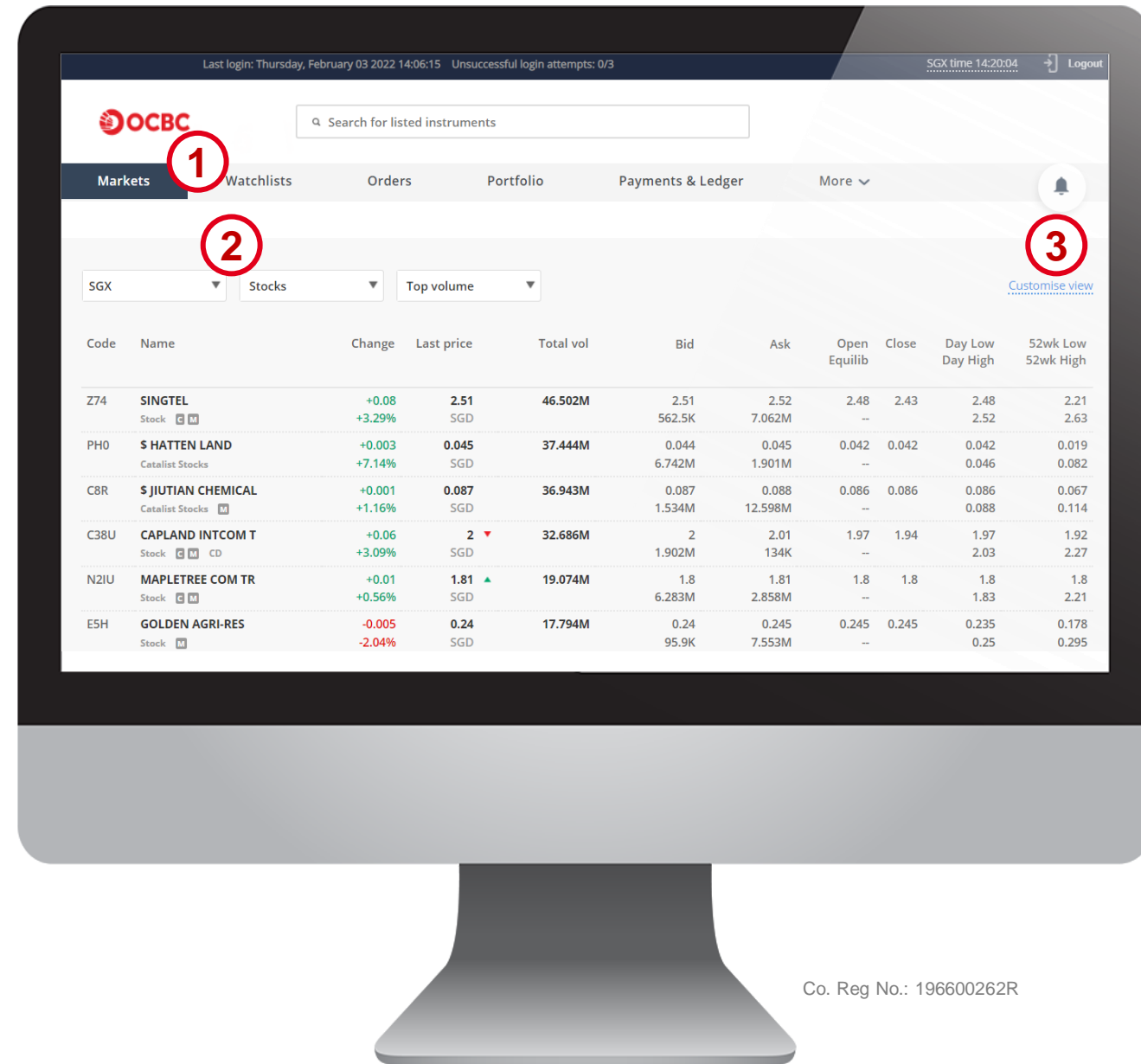
2 View your last log in date and time



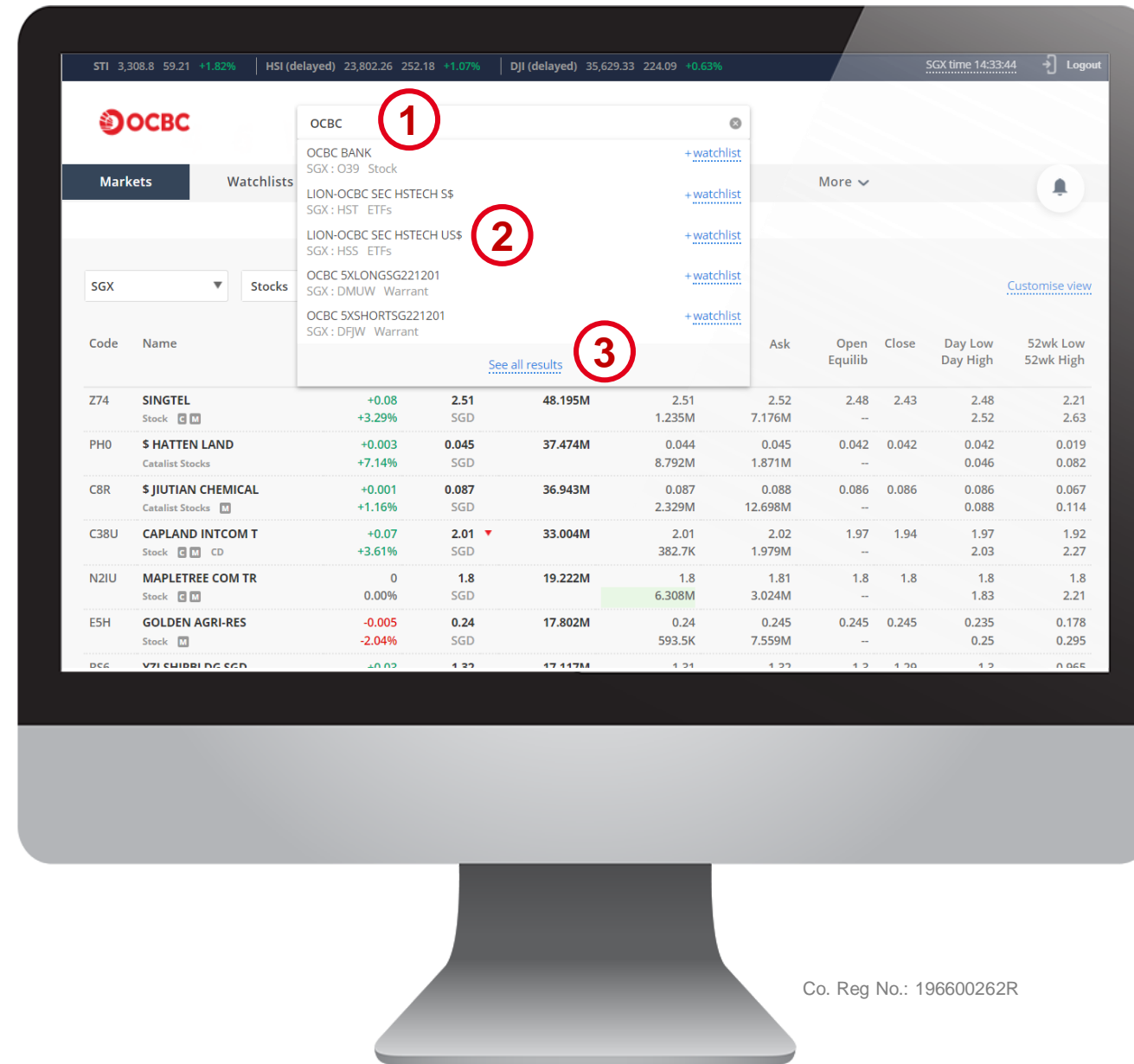
MARKETS | Viewing quotes



- 1 Click on **Markets** to access price quotes
- 2 Change filter settings to display desired market information
- 3 Select **Customise view** to hide or show desired market information



- 1 Search for counters by entering the counter name or code in the search box
- 2 Click on any counter shown in the list to view the counter information
- 3 Click on [See all results](#) to locate more counters matching the search criteria

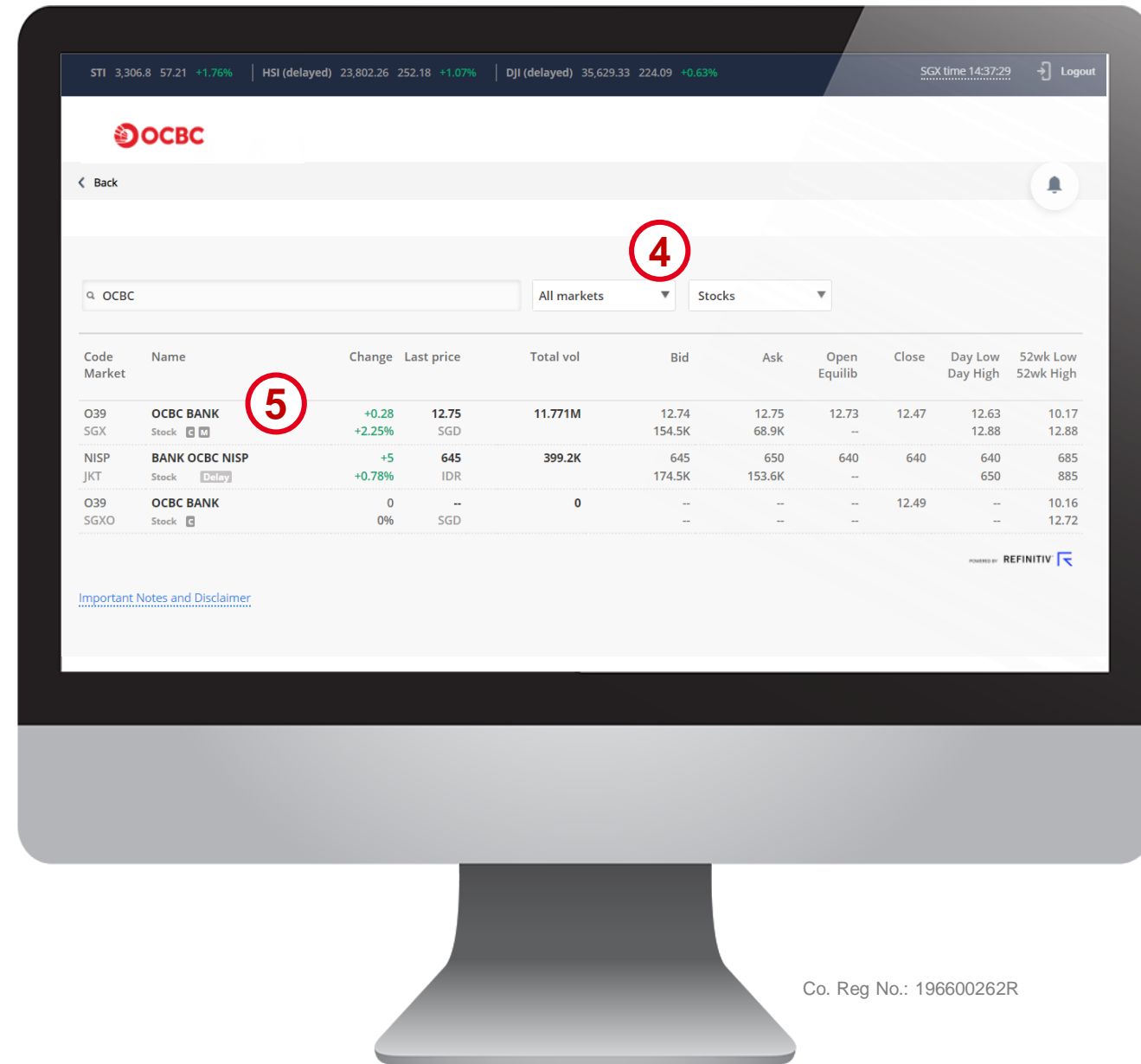


MARKETS | Search > See all results



4 Filter full list of results by changing filter selection

5 Click on any counter shown in the list to open the counter information ticket



MARKETS | Placing an order

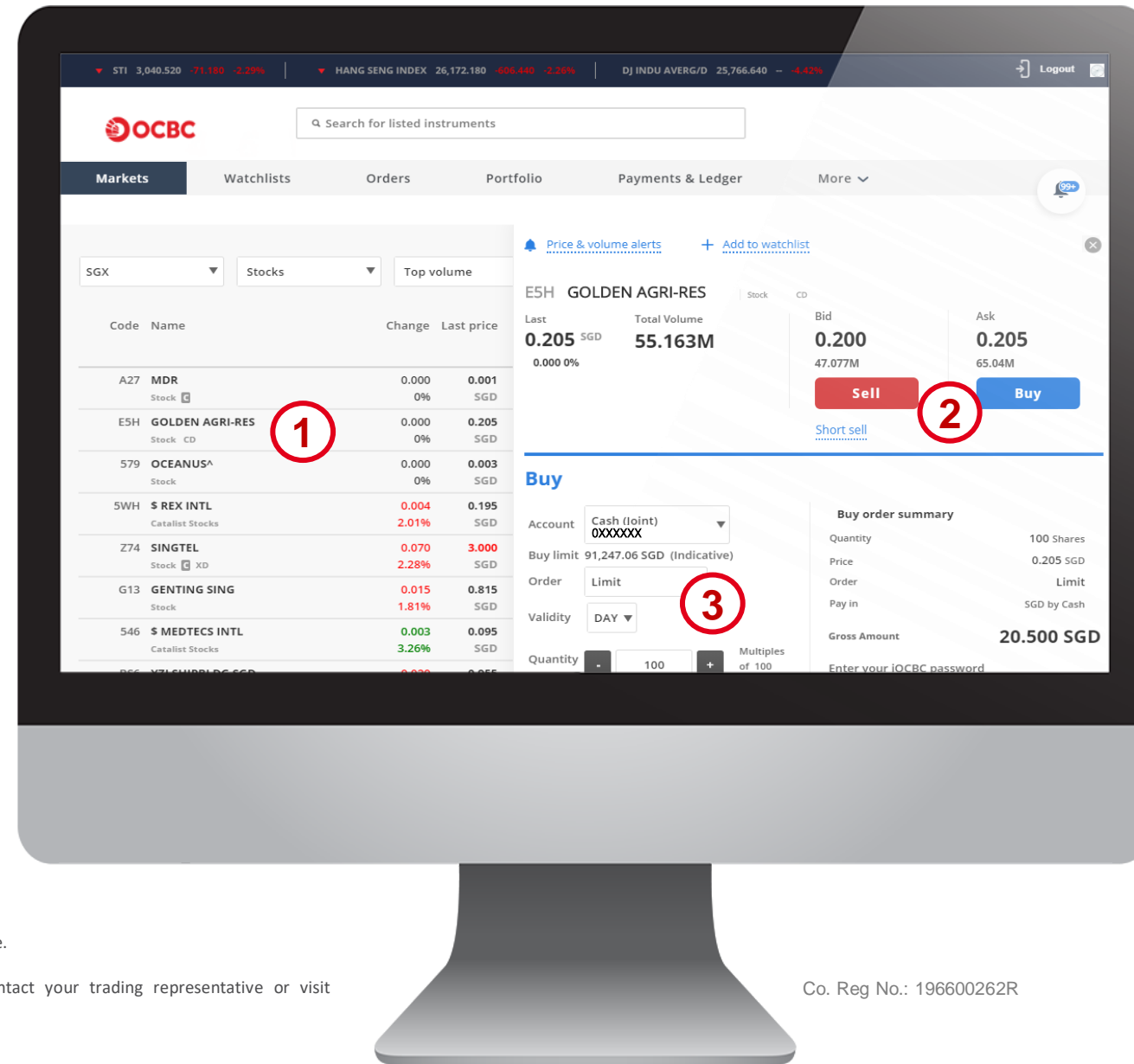


1 Click on the counter to place an order.
Details of the counter will be shown on the counter information ticket.

2 Select **Buy** or **Sell** or **Short sell**

(Short sell order reporting is required only for SGX trades)

3 Key in your desired order details^{1,2,3,4}



Note:

¹ Quantity is in number of shares and entered in multiple as displayed on the ticket.

² Please ensure that you have linked up the CPF Investment Account to your trading account in order to submit any CPF trade.

³ Please ensure that you have linked up the SRS Account to your trading account in order to submit any SRS trade.

⁴ Advanced order types are available on SGX and US markets for Cash and Share Financing Accounts. Please contact your trading representative or visit <https://portal.iocbc.com/help-and-support/using-our-trading-platforms-iocbc-userguides> for more details.

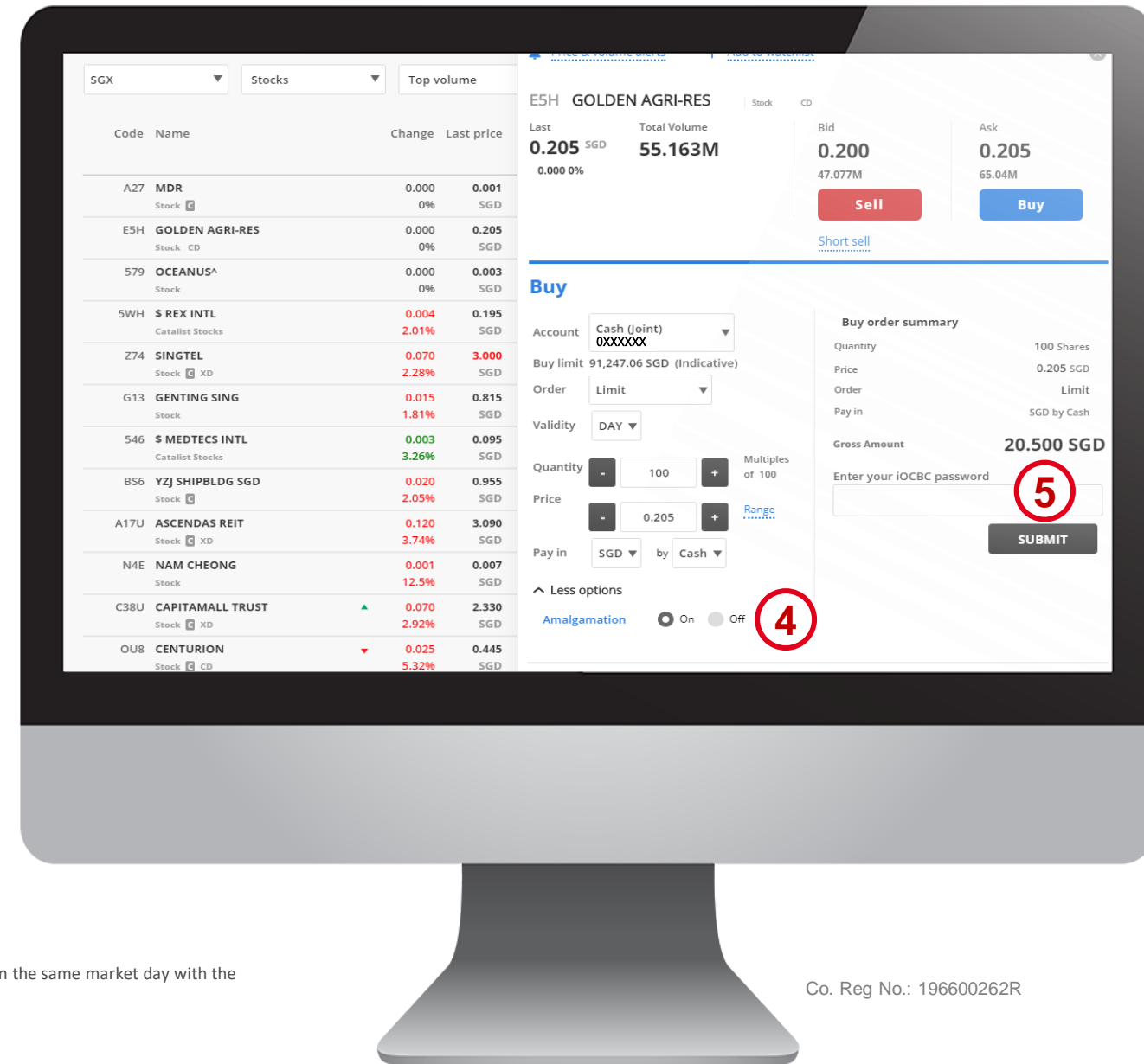
Co. Reg No.: 196600262R

MARKETS | Placing an order



4 Amalgamation¹ is **On** as default

5 Key in your password and press **Submit** to confirm (You can skip this step by disabling Trade Authentication under Online Preferences)



Note:

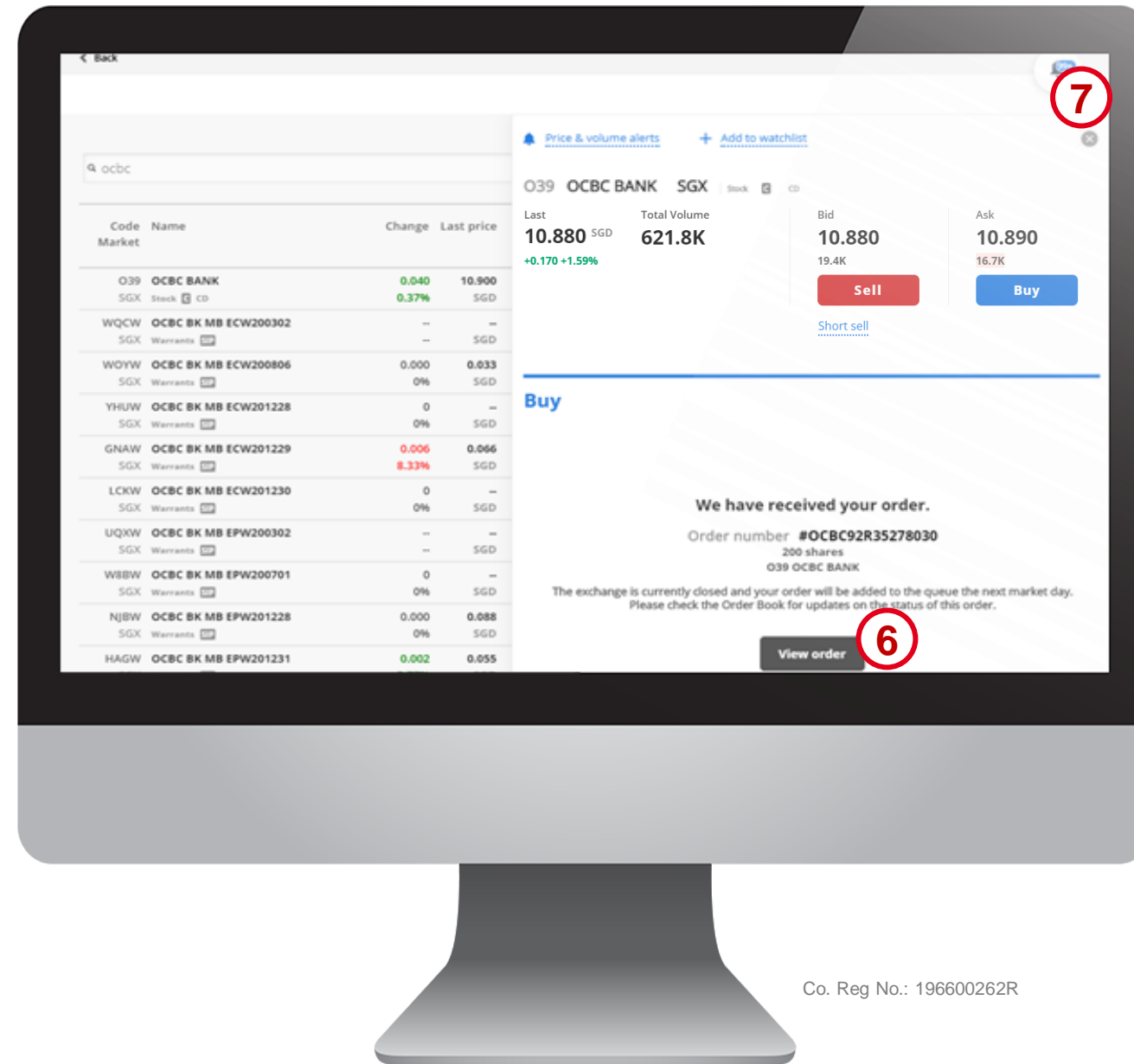
¹ Amalgamation is the consolidation of several trades into one. It is only applicable for trades placed for the same counter, on the same market day with the same action and payment mode. e.g. buy with buy, sell with sell.

MARKETS | Placing an order



6 Click on [View order](#) to view the order book, or to amend order details
(See [ORDERS](#) | View Orders for more details)

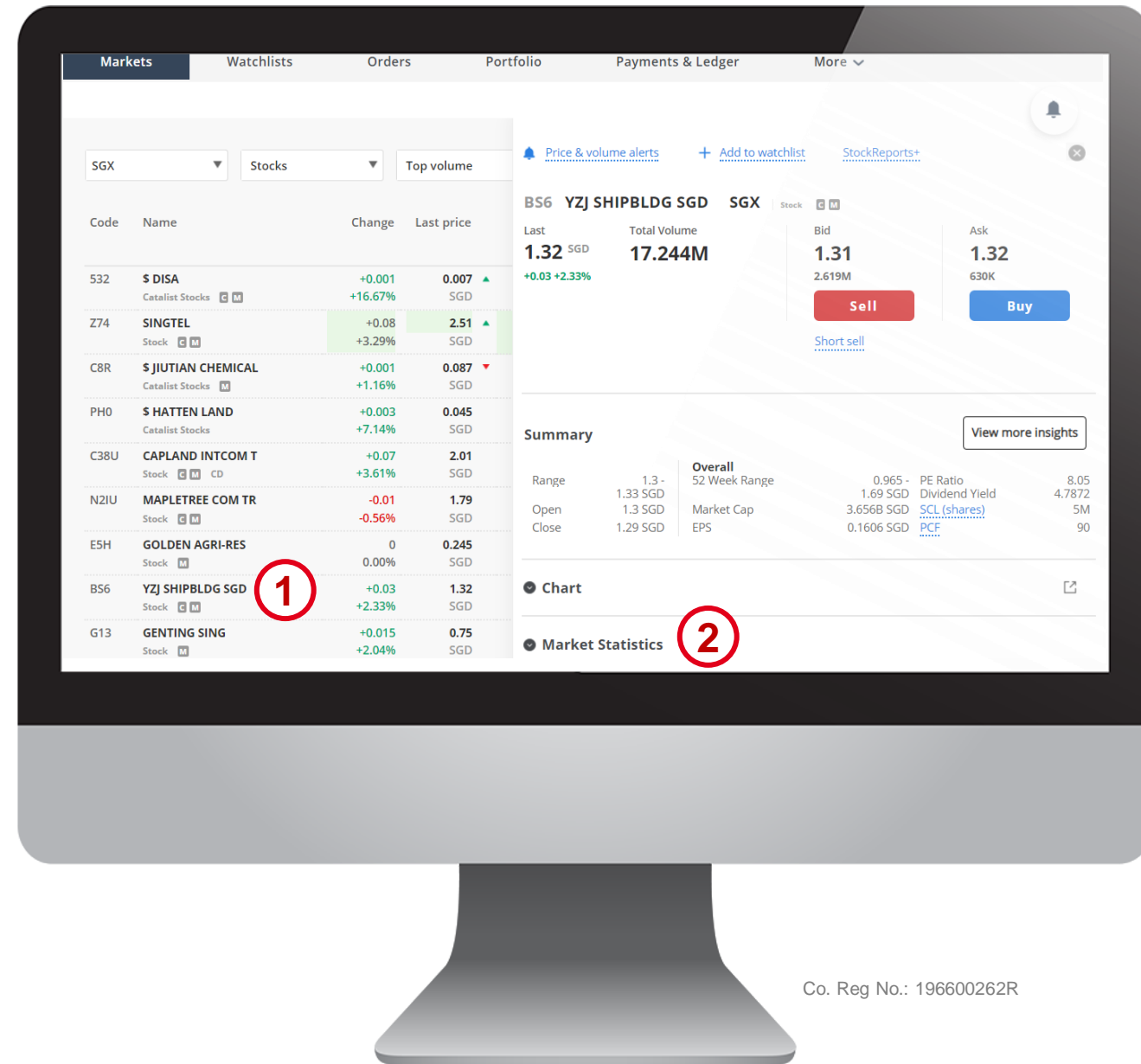
7 Close the order ticket once you have confirmed the order details



MARKETS | Market statistics



- 1 Open up a counter information ticket
- 2 Click on [Market Statistics](#) to expand the section



MARKETS | Market statistics > Bid and Ask (iMatrix)

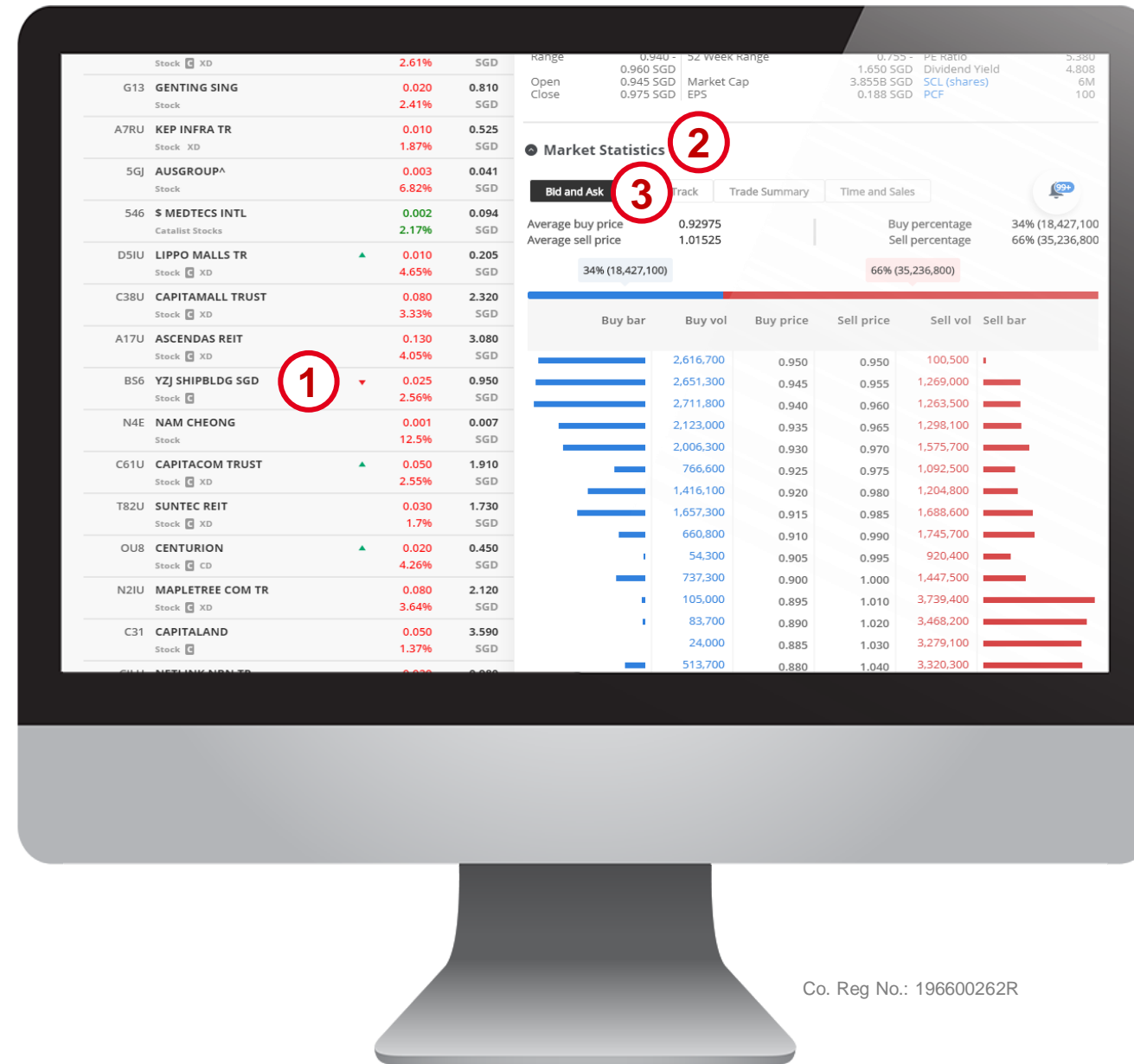


1 Open up a counter information ticket

2 Click on **Market Statistics** to expand the section

3 Select **Bid and Ask**

(Bid and Ask allows you to view the “live” buy and sell queue of the counter. You will need an iMatrix subscription in order to view the Bid & Ask of the counter. Please contact your TR or Customer Service for more information.)



MARKETS | Market statistics > Queue Track (iMatrix)



1 Open up a counter information ticket

2 Click on **Market Statistics** to expand the section

3 Select **Queue Track**

(Queue track allows you to view the queue sequence of the counter)

Time: Time of the queue sequence

Buy Queue: Total Buy volume¹

Buy: Buy price

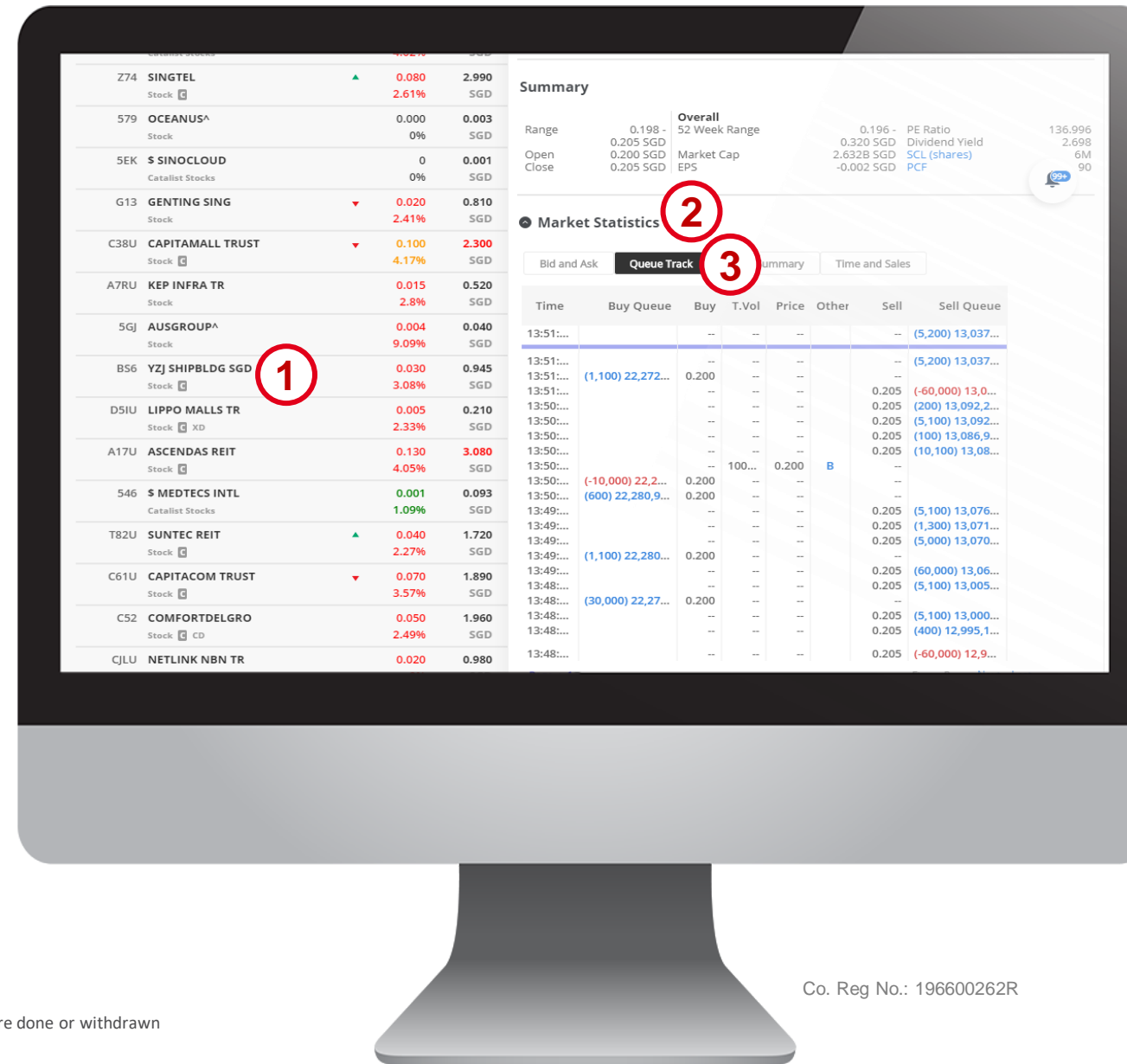
T. Vol: Traded volume

Price: Price done

W: Withdraw from Buy or Sell queue

Sell: Sell Price

Sell Queue: Total Sell volume



Co. Reg No.: 196600262R

Note: ¹ E.g. (-2,000) 47,000. This means that 2,000 shares are removed from the queue. It may be because the 2,000 shares are done or withdrawn from the queue.

You will need an iMatrix subscription in order to view the Queue Track of the

MARKETS | Market statistics > Trade Summary



1 Open up a counter information ticket

2 Click on [Market Statistics](#) to expand the section

3 Select [Trade Summary](#)

(Trade summary summarizes the Time & Sales in terms of price, trade and volume.)

Buy Volume: Total buy volume/ Buy volume chart

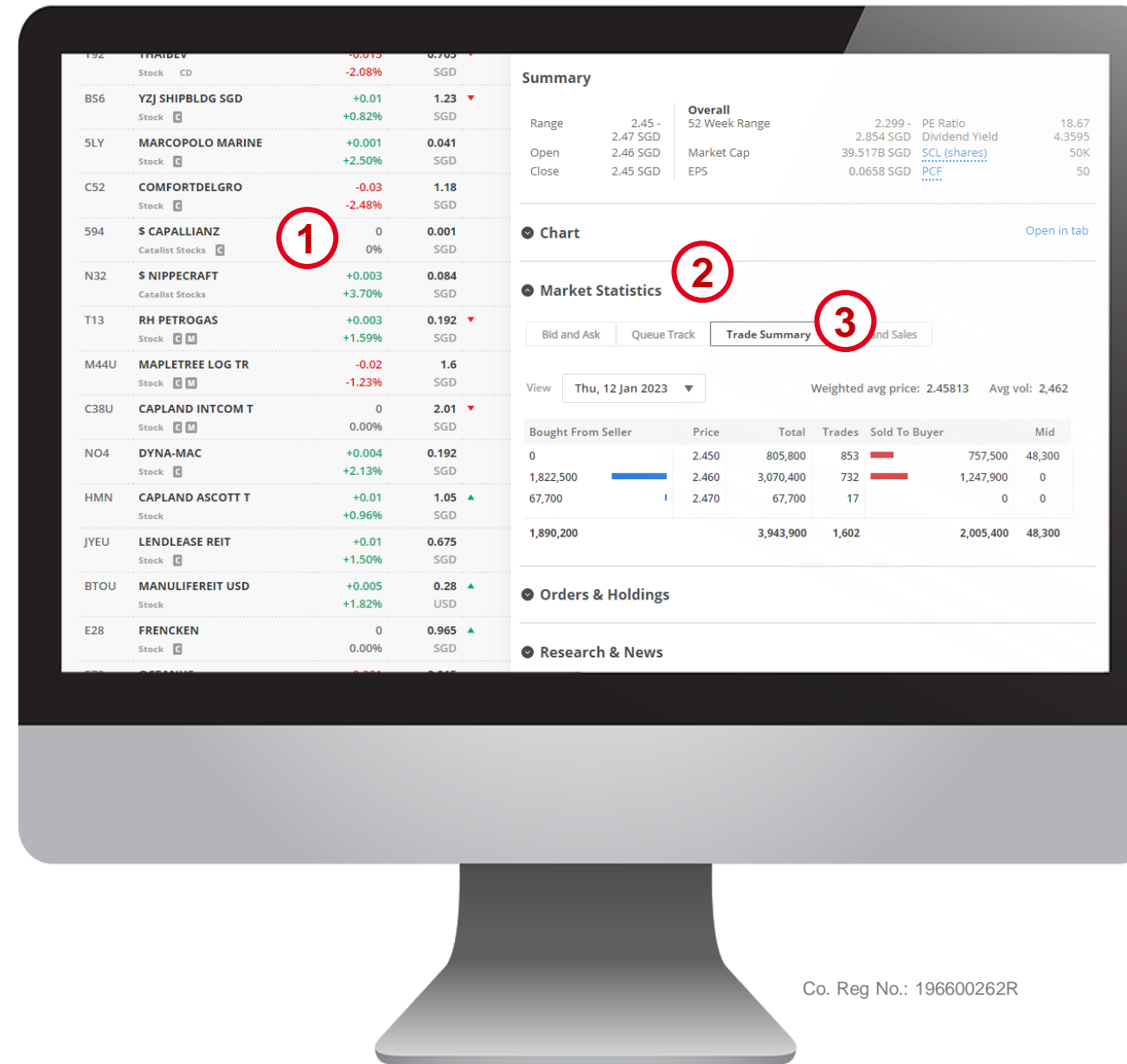
Price: The price which the trade is done

Total: Total volume

Trades: Number of trades done

Sell Volume: Total sell volume / Sell volume chart

Mid: Number of shares transacted in a married deal



MARKETS | Market statistics > Time and Sales



1 Open up a counter information ticket

2 Click on [Market Statistics](#) to expand the section

3 Select [Time and Sales](#)

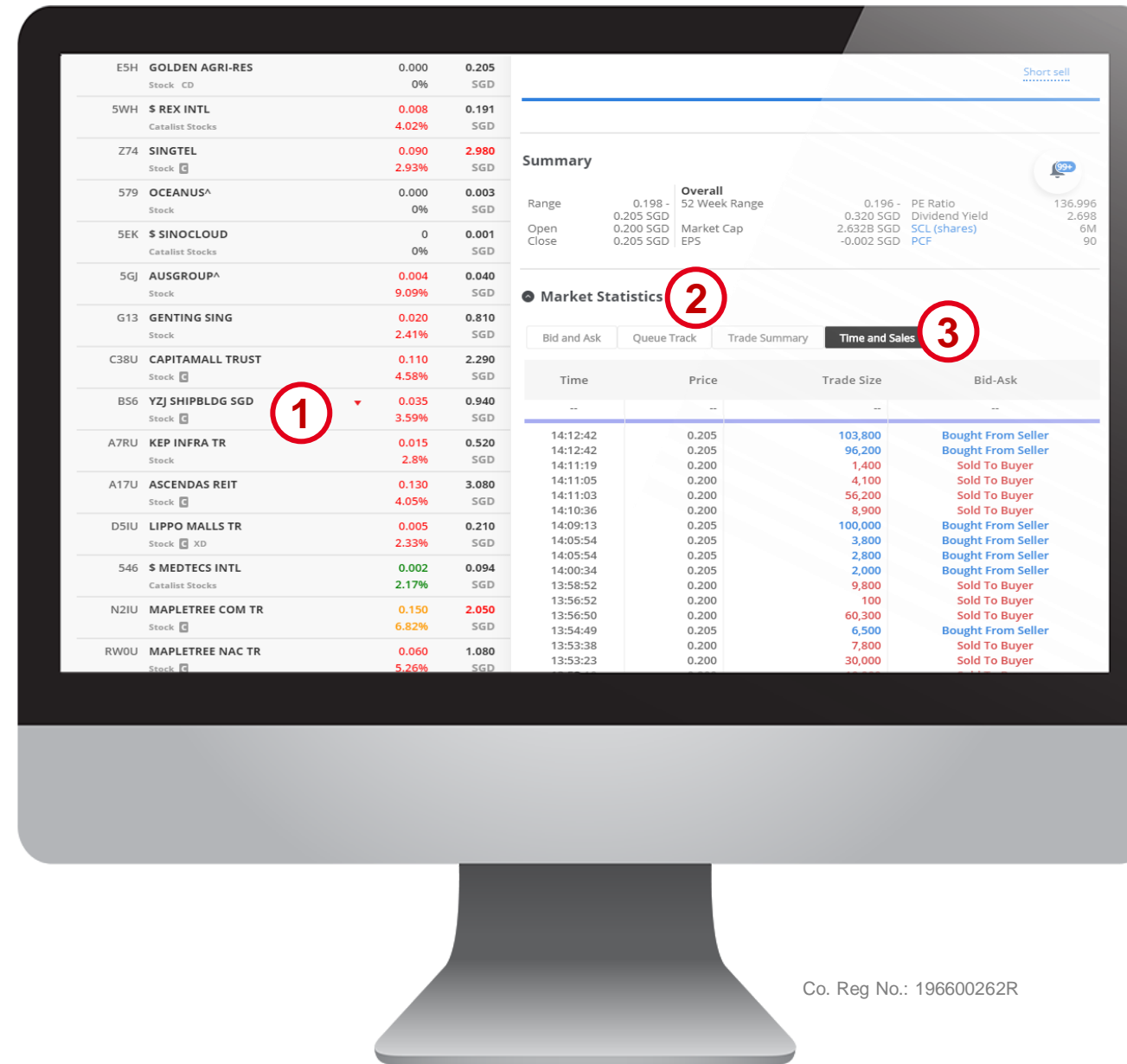
(Time and Sales captures each trade done for the counter.)

Time: The time which the trade is done

Price: The price which the trade is done

Trade Size: The total volume of trade done

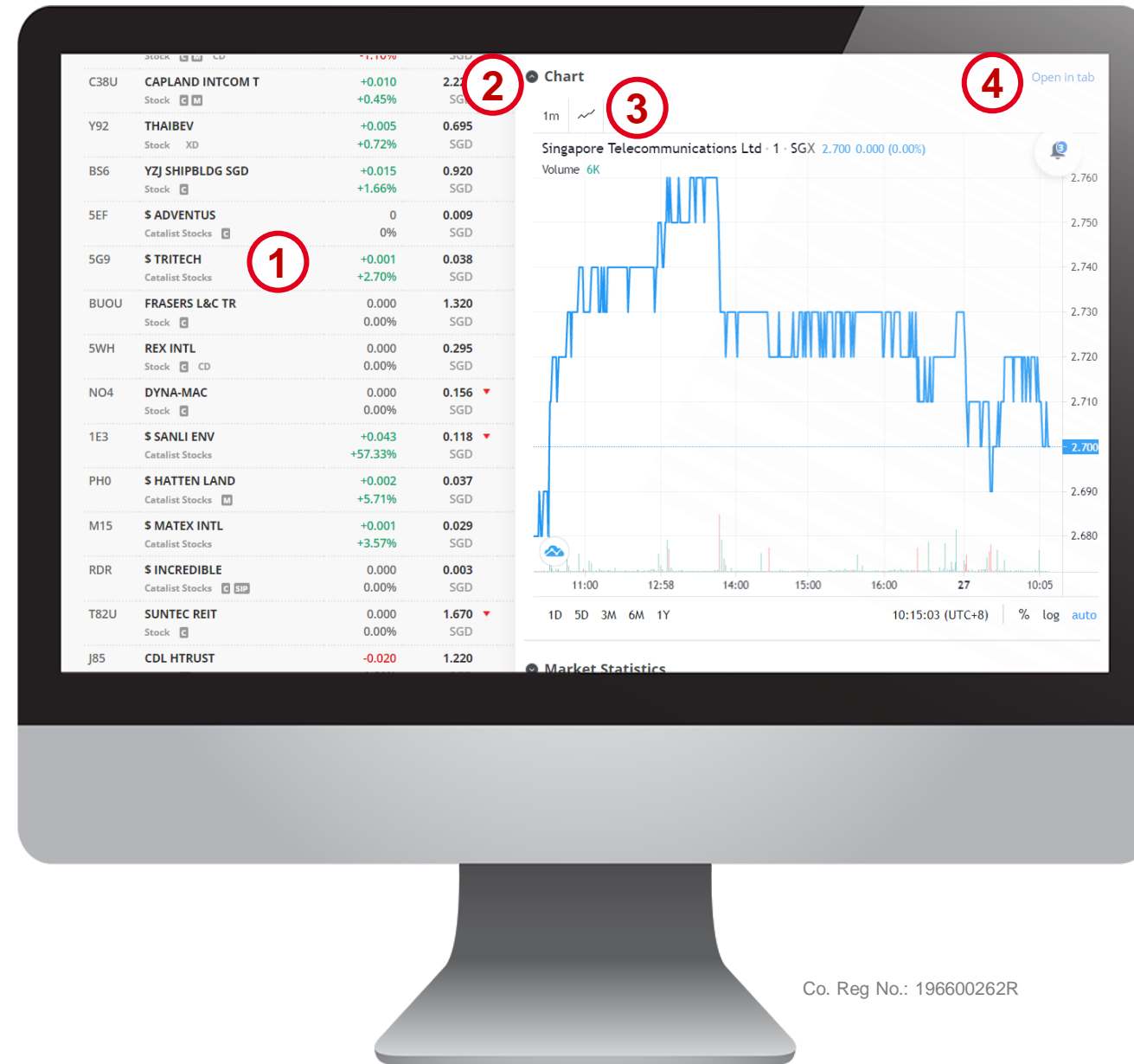
Bid-Ask: Narration of the sales closed



MARKETS | Charting



- 1 Open up a counter information ticket
- 2 Click on **Chart** to expand the section
- 3 Use the filters to adjust chart type, chart interval and chart range
- 4 Click “Open in tab” to open advanced charting



MARKETS | Advanced charting



5 Toggle advanced charting tools and settings

6 To view more than 1 chart at the same time, click on the Select Layout icon to choose your preferred chart layout



MARKETS | Advanced charting



7 Within the Select Layout setting, click on desired layout with up to 8 charts available

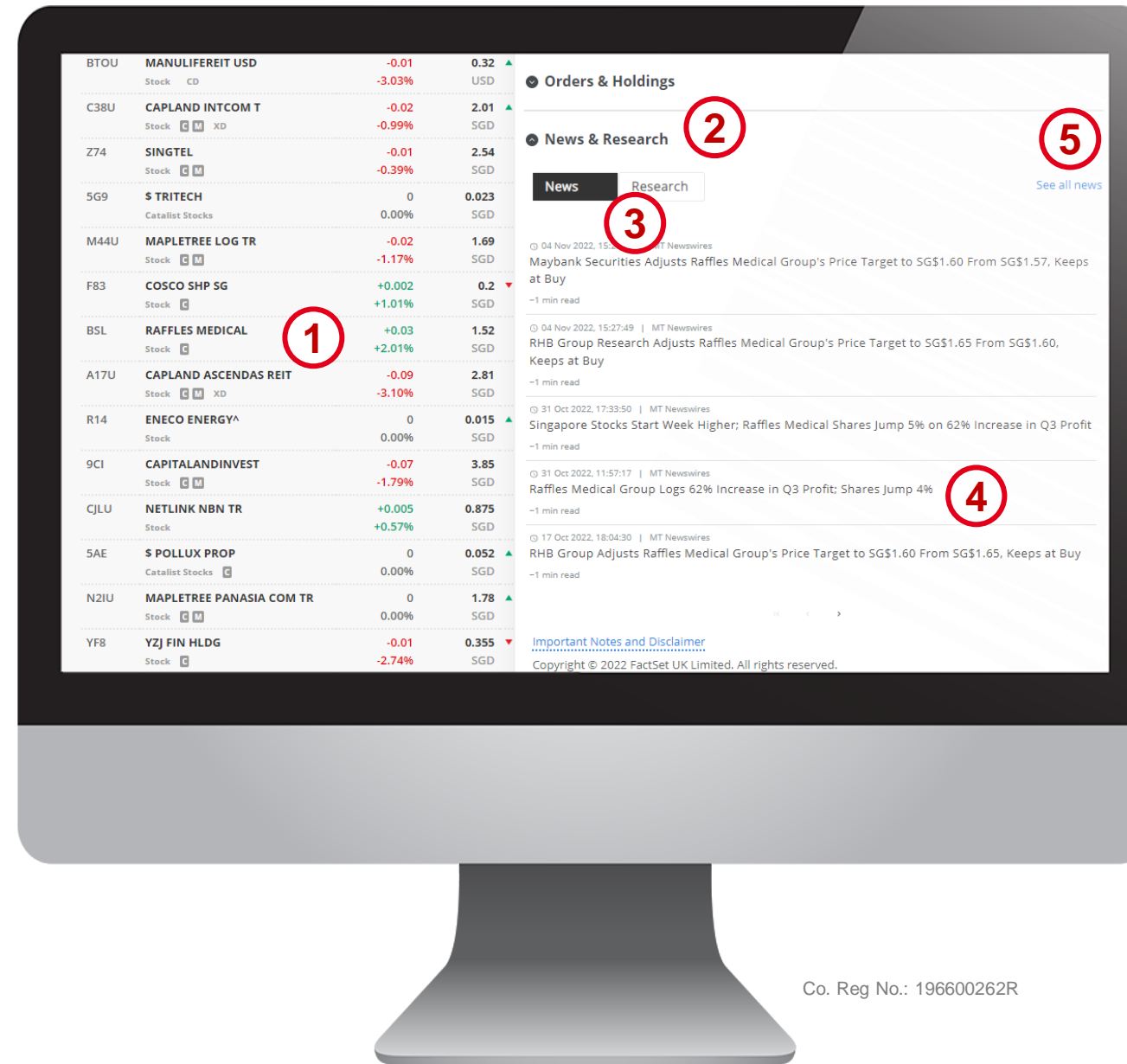
8 Select the specific features (Symbol, Crosshair, Time, Interval and Drawings) to add to your charts



MARKETS | Research & news



- 1 Open up a counter information ticket
- 2 Click on **News & Research** to expand the section
- 3 Select **News** or **Research** to view articles related to the selected counter
- 4 Click on a title to read the article
- 5 Click on **See all news** to view all news articles



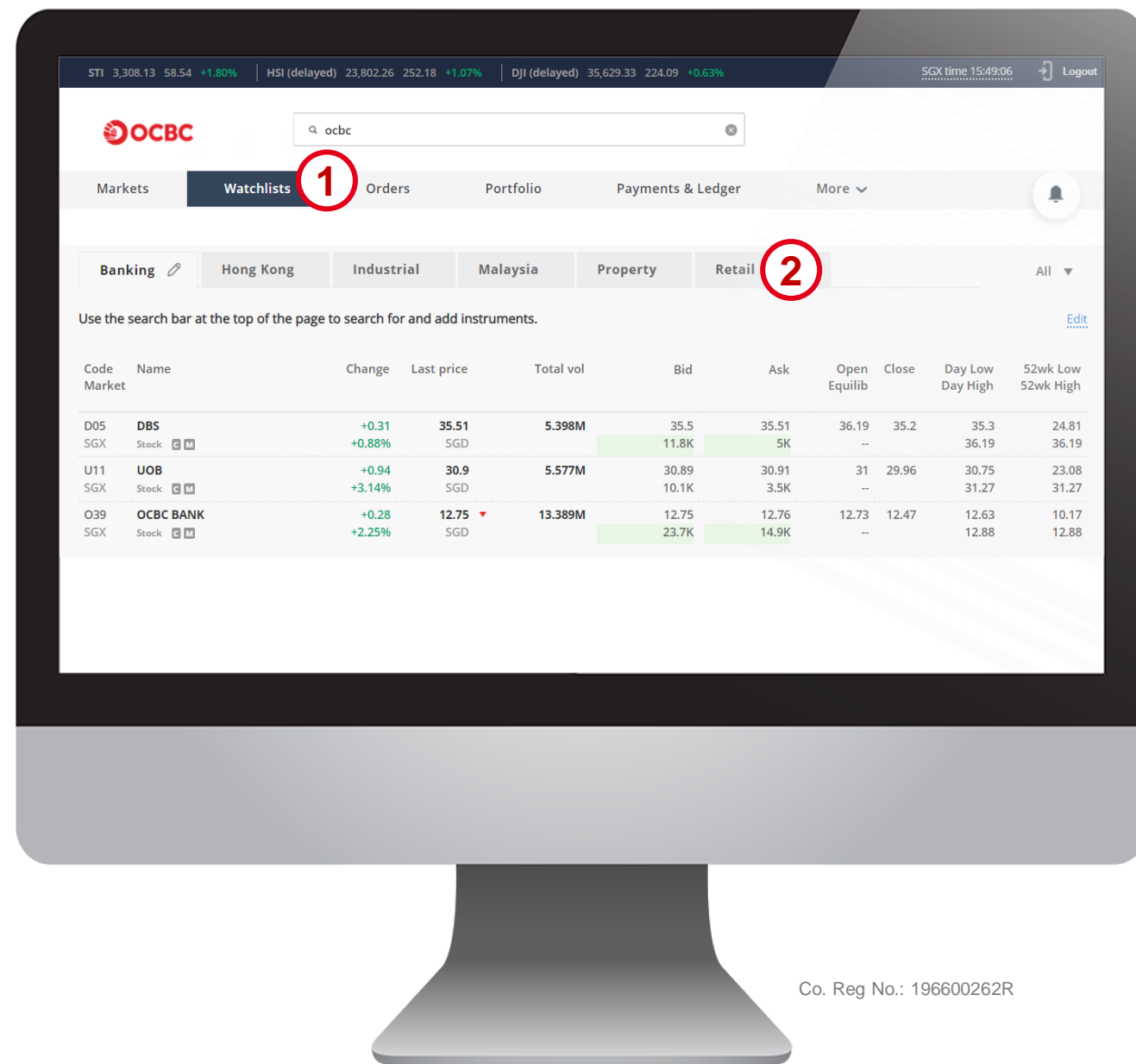
WATCHLISTS | Accessing your watchlists



1 Click on **Watchlists** to access your watchlists

2 Select any Watchlists that you previously created

(You can create up to 10 Watchlists with a total of 500 securities for you to monitor closely)

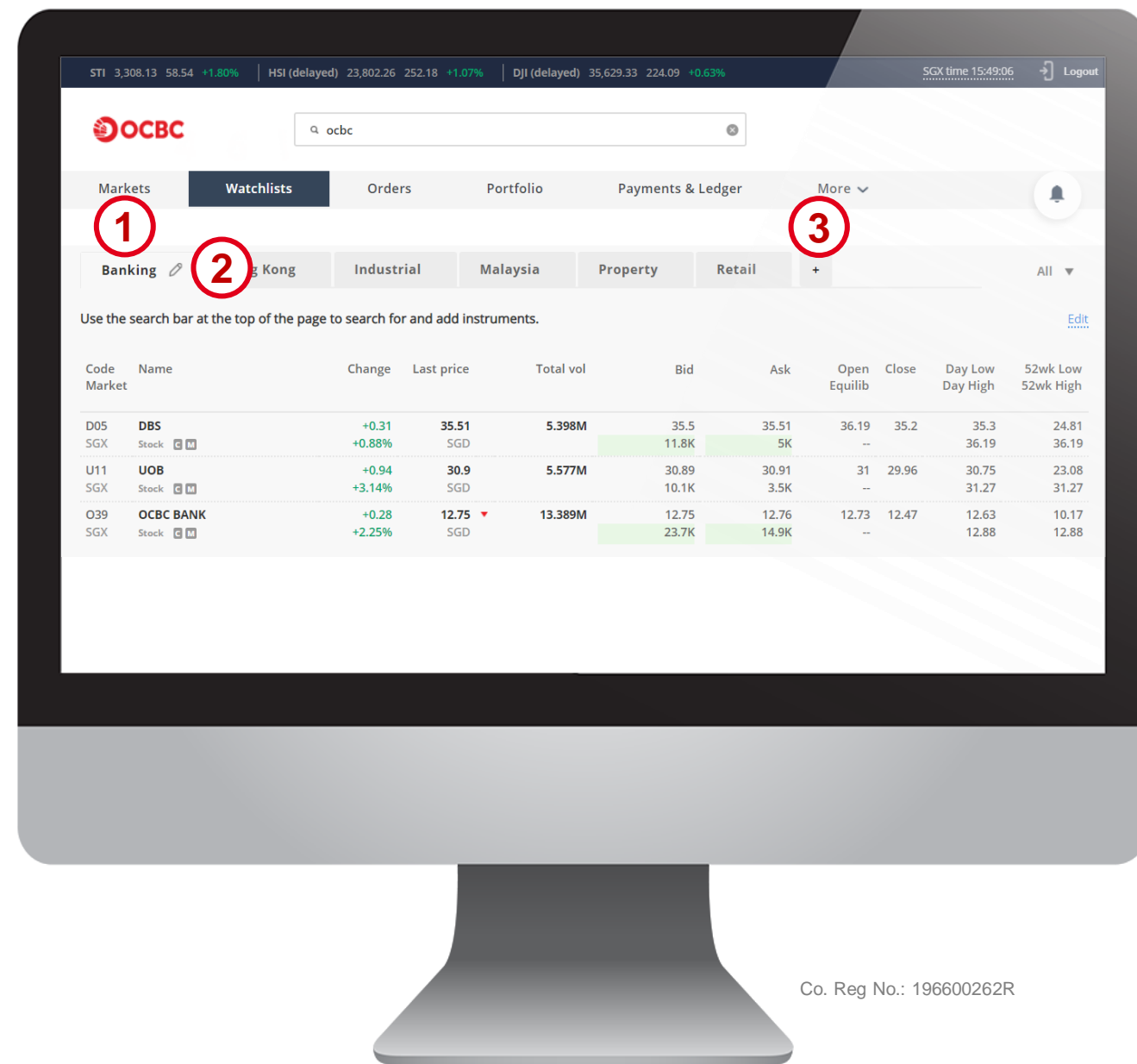


WATCHLISTS | Creating and renaming your watchlists¹



Method 1: From Watchlists page

- 1 Select any Watchlists that you previously created
- 2 Click on the **Edit** icon to rename or delete the selected Watchlist
- 3 Click on **+** to create a new Watchlist



Note:

¹ You can create up to 10 Watchlists with a total of 500 securities for you to monitor closely at a glance.

Co. Reg No.: 196600262R

WATCHLISTS | Creating and renaming your watchlists¹

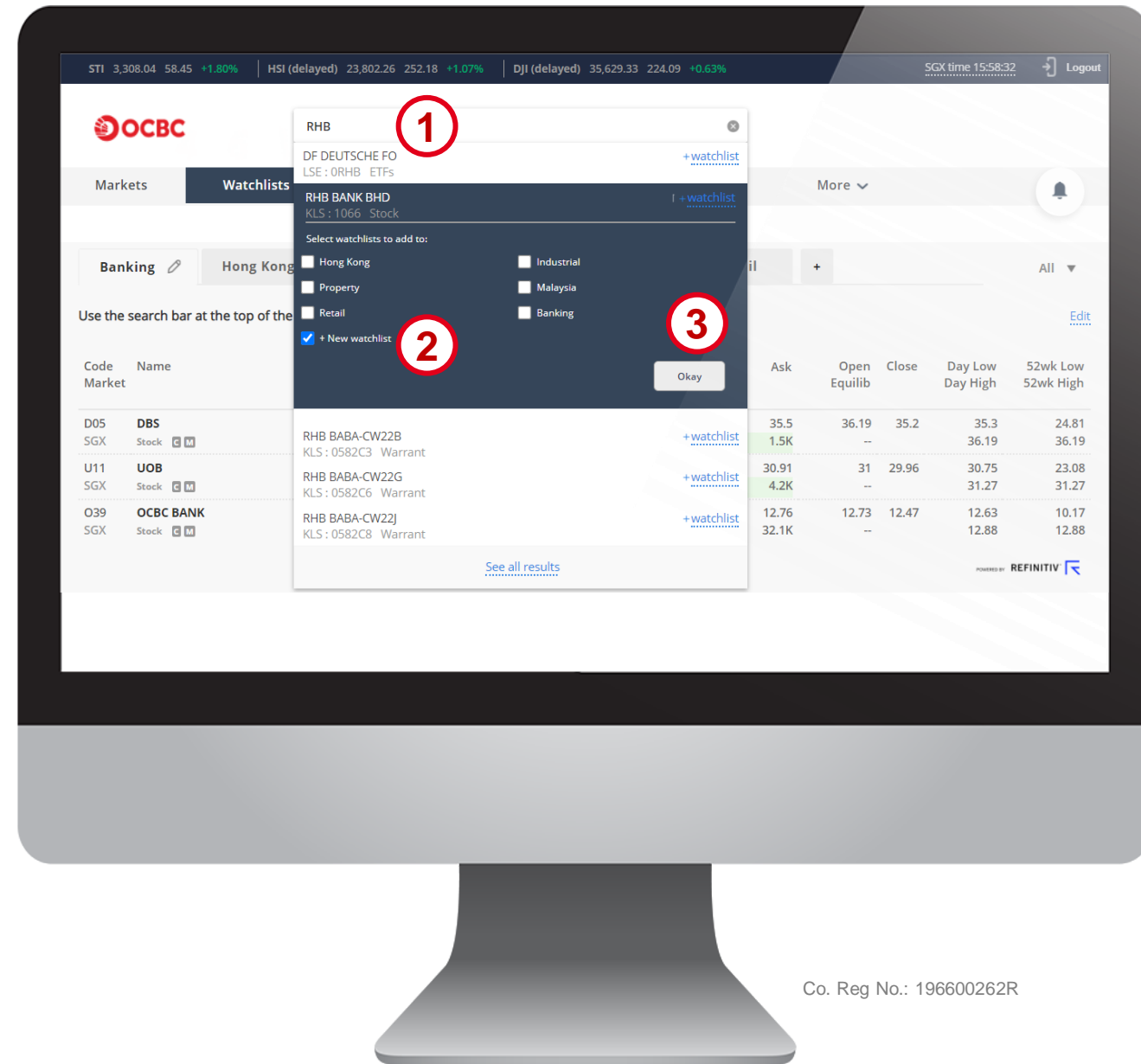


Method 2: From search

1 Search for the counter you would like to add into a newly created Watchlist

2 Select **+ New Watchlist** or **Select any existing watchlist(s)** to add the searched counter

3 Click **Okay** to confirm



Note:

¹ You can create up to 10 Watchlists with a total of 500 securities for you to monitor closely at a glance.

Co. Reg No.: 196600262R

WATCHLISTS | Creating and renaming your watchlists¹



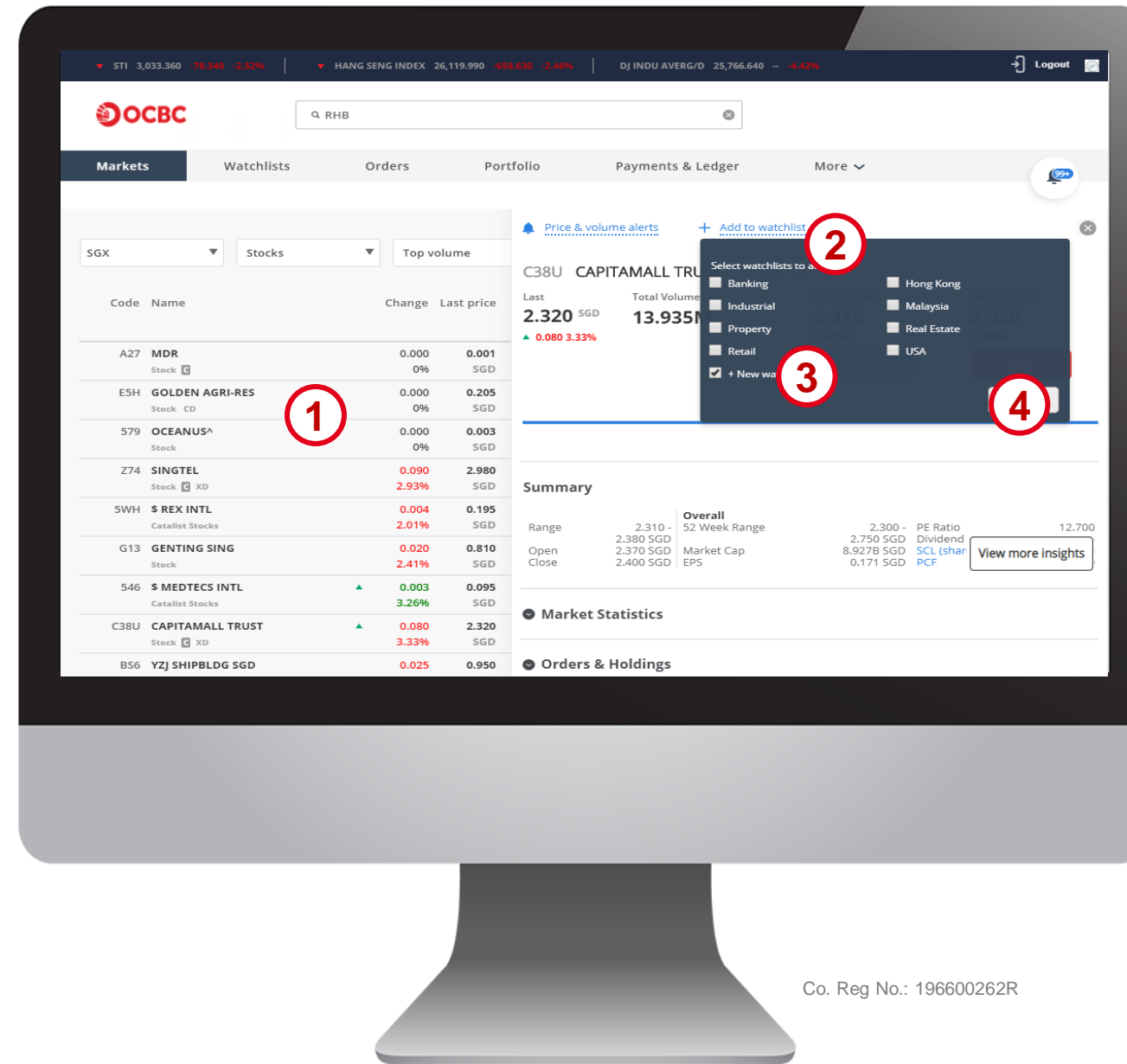
Method 3: From counter information ticket

1 Click on the counter you would like to add into a newly created Watchlist

2 Click on + Add to Watchlists

3 Select + New Watchlist or Select any existing Watchlist(s) to add the searched counter

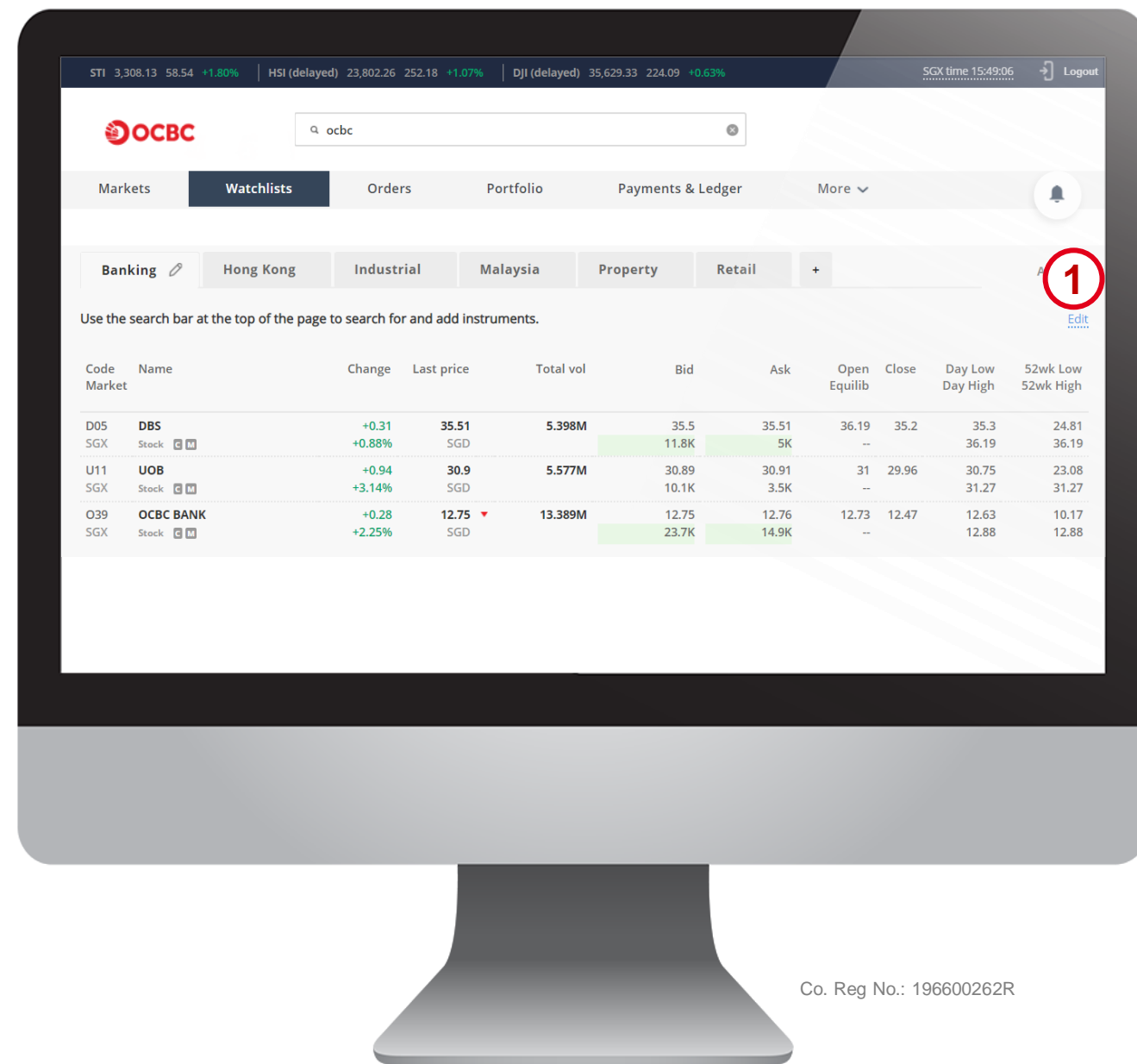
4 Click Okay to confirm



WATCHLISTS | Editing watchlist counters



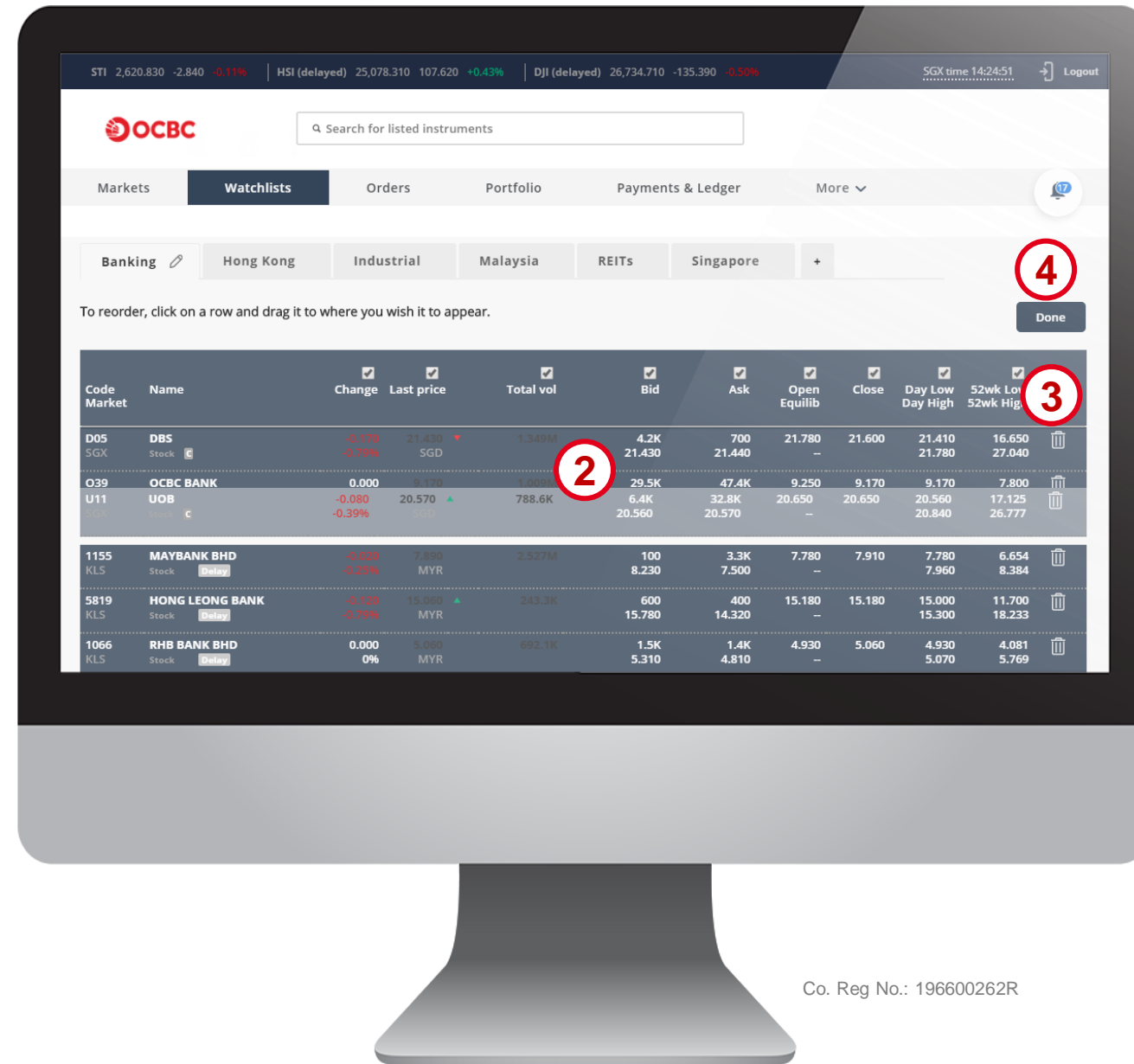
1 Click on the **Edit** button



WATCHLISTS | Editing watchlist counters



- 2 Drag and drop the counters to reorder their positioning
- 3 Click on the **Delete** button to remove the counter from the watchlist
- 4 Click **Done** to confirm



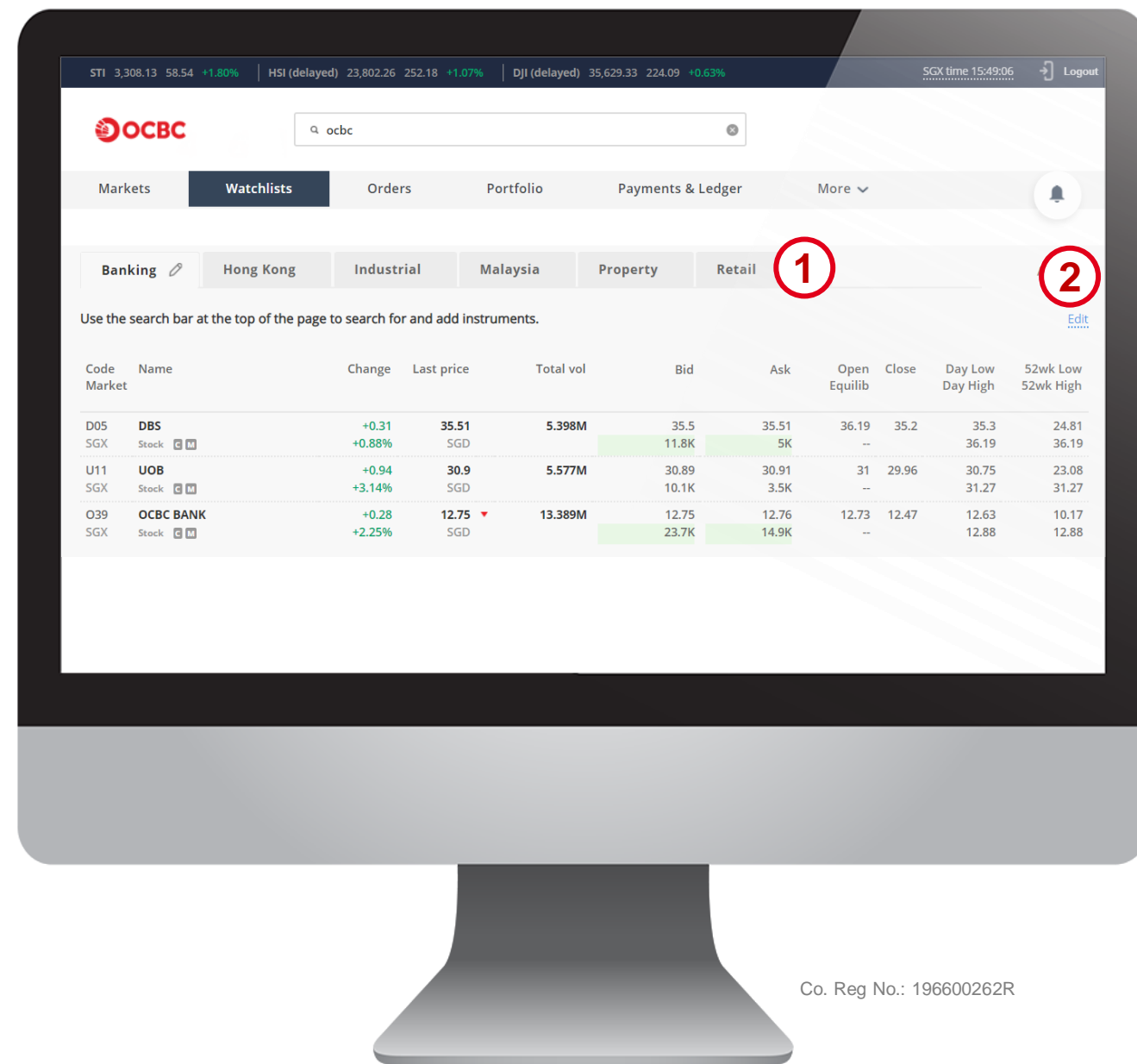
WATCHLISTS | Deleting your watchlists¹



Method 1: From Watchlists page

1 Select any Watchlists that you previously created

2 Click on [Edit](#)



WATCHLISTS | Removing counters from watchlists¹

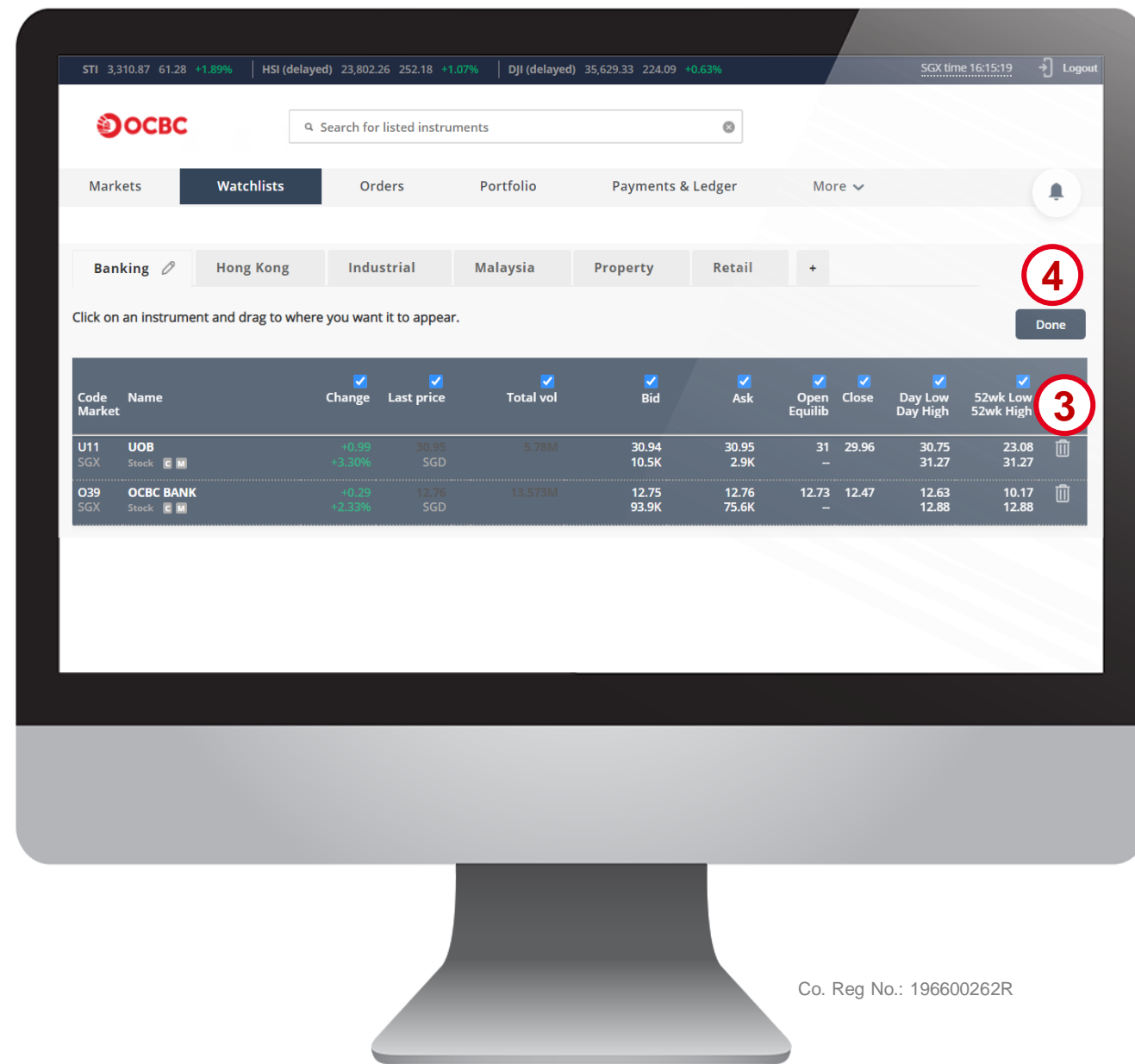


Method 1: From Watchlists page

3 Click on the **Delete** icon

(You can also choose to customize the display of your watchlist by hiding or showing your preferred columns)

4 Select **Done**



WATCHLISTS | Removing counters from watchlists¹



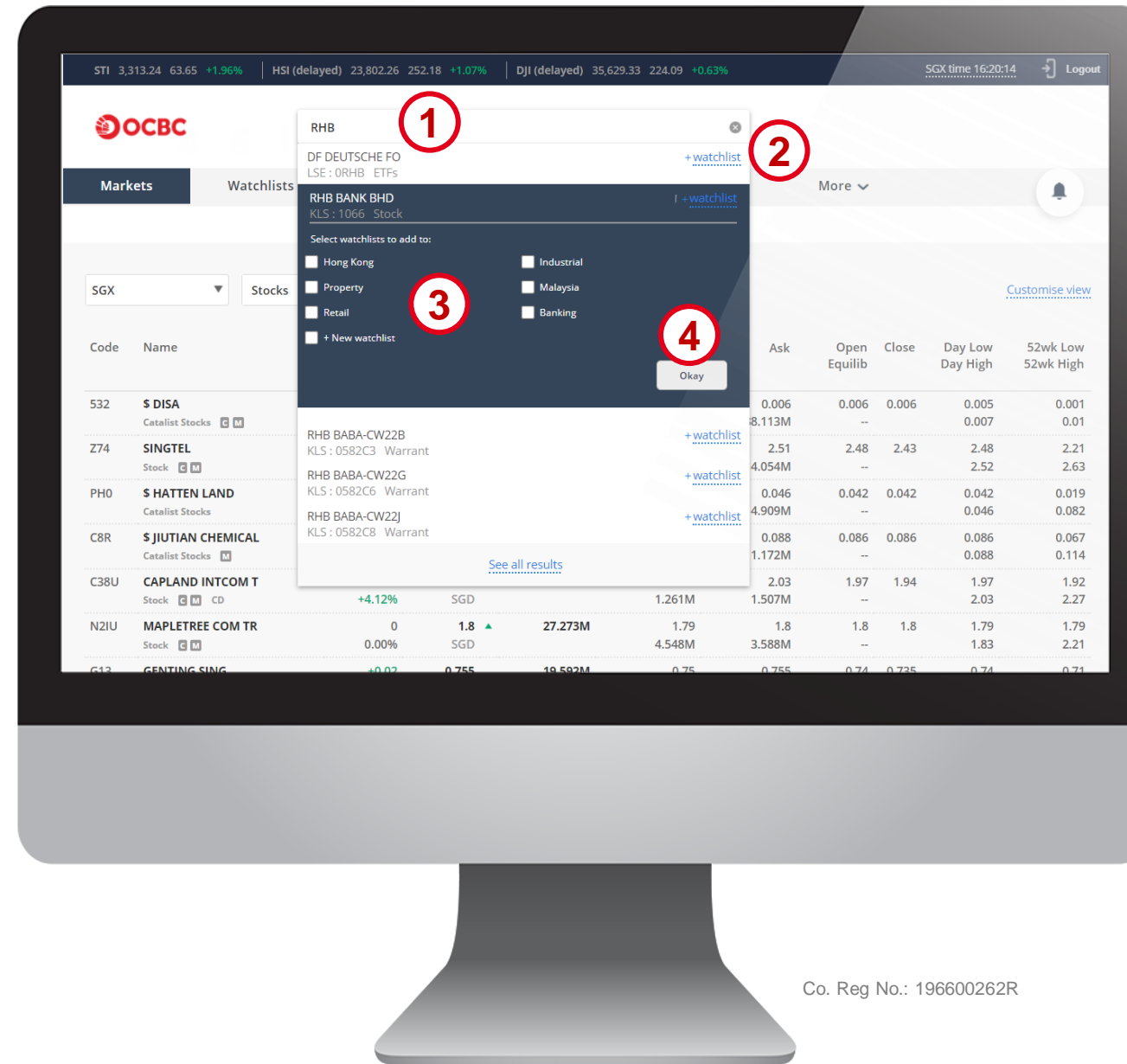
Method 2: From search

1 Search for the counter

2 Click + Watchlist

3 Uncheck the Watchlist(s) you would like to remove the counter from

4 Click on Okay to remove counter from Watchlist



WATCHLISTS | Removing counters from watchlists¹



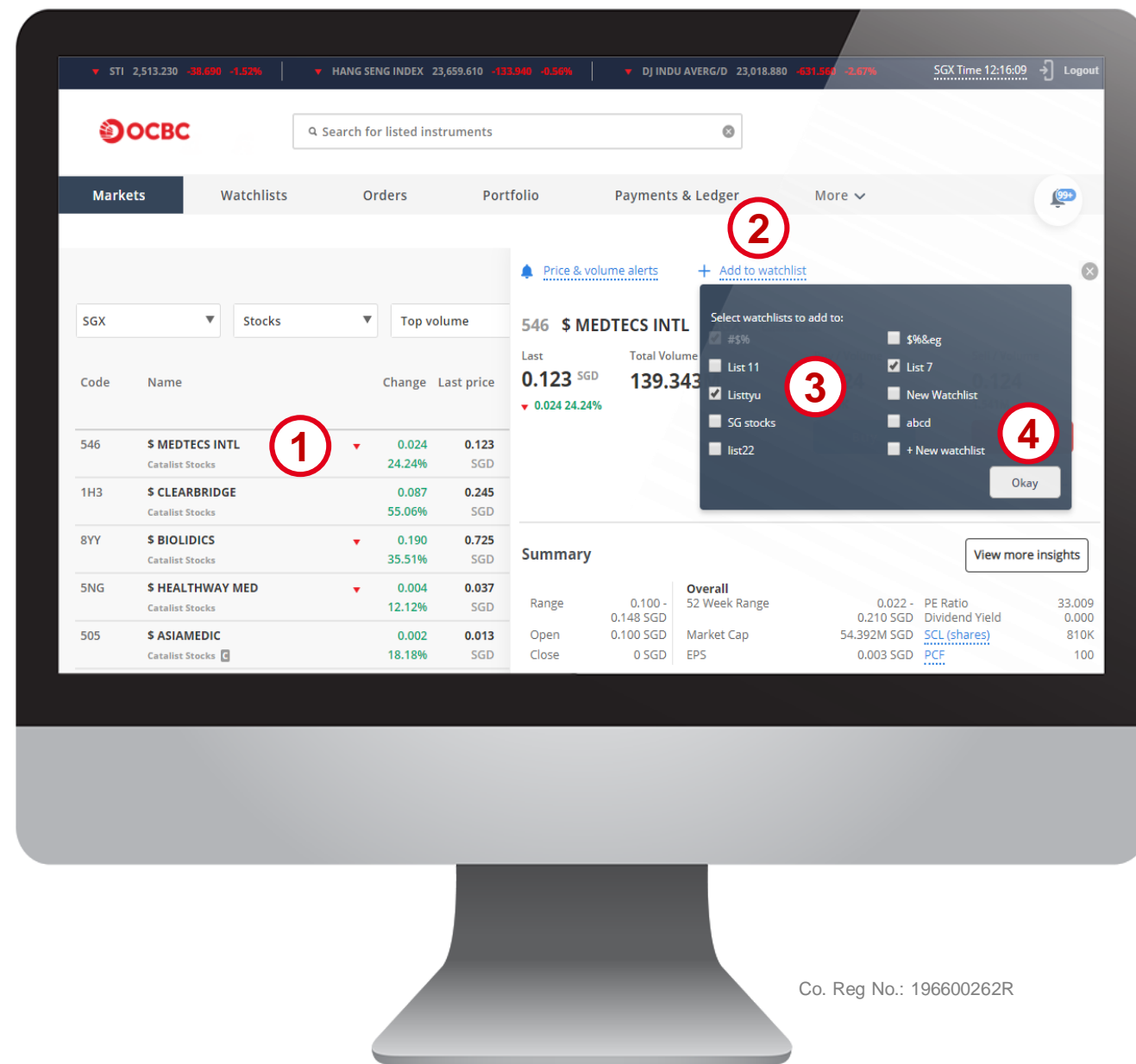
Method 3: From counter information ticket

1 Open the counter information ticket for a counter in any existing Watchlist

2 Click on + Add to Watchlists

3 Uncheck the Watchlist(s) you would like to remove the counter from

4 Click **Okay** to confirm



ORDERS | View current orders

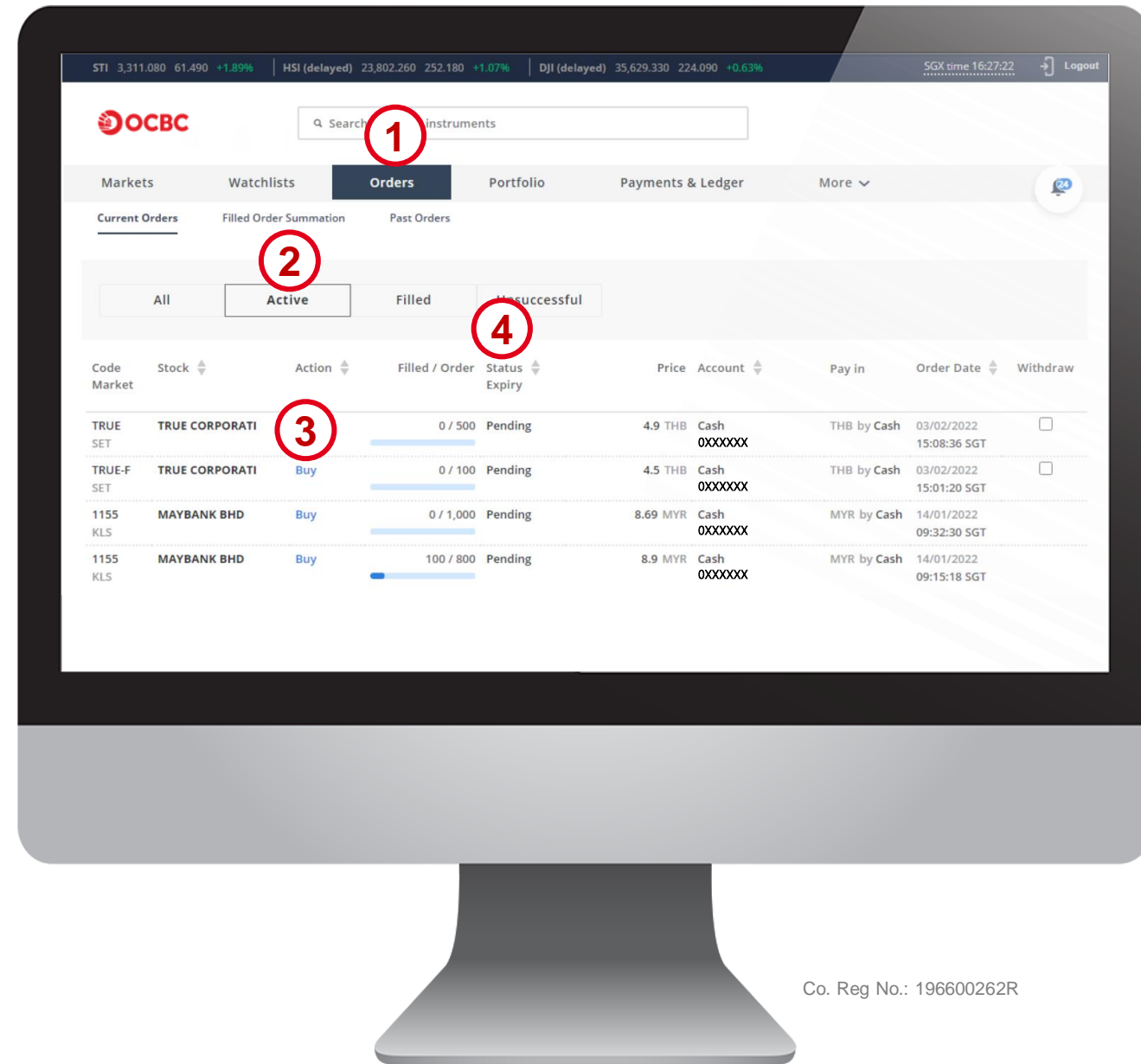


1 Your orders current can be viewed upon clicking **Orders**

2 Filter your order(s) by Status

3 Click on an order to view the order log and full order details

4 Check order status under *Status* column



ORDERS | Withdraw orders



Method 1

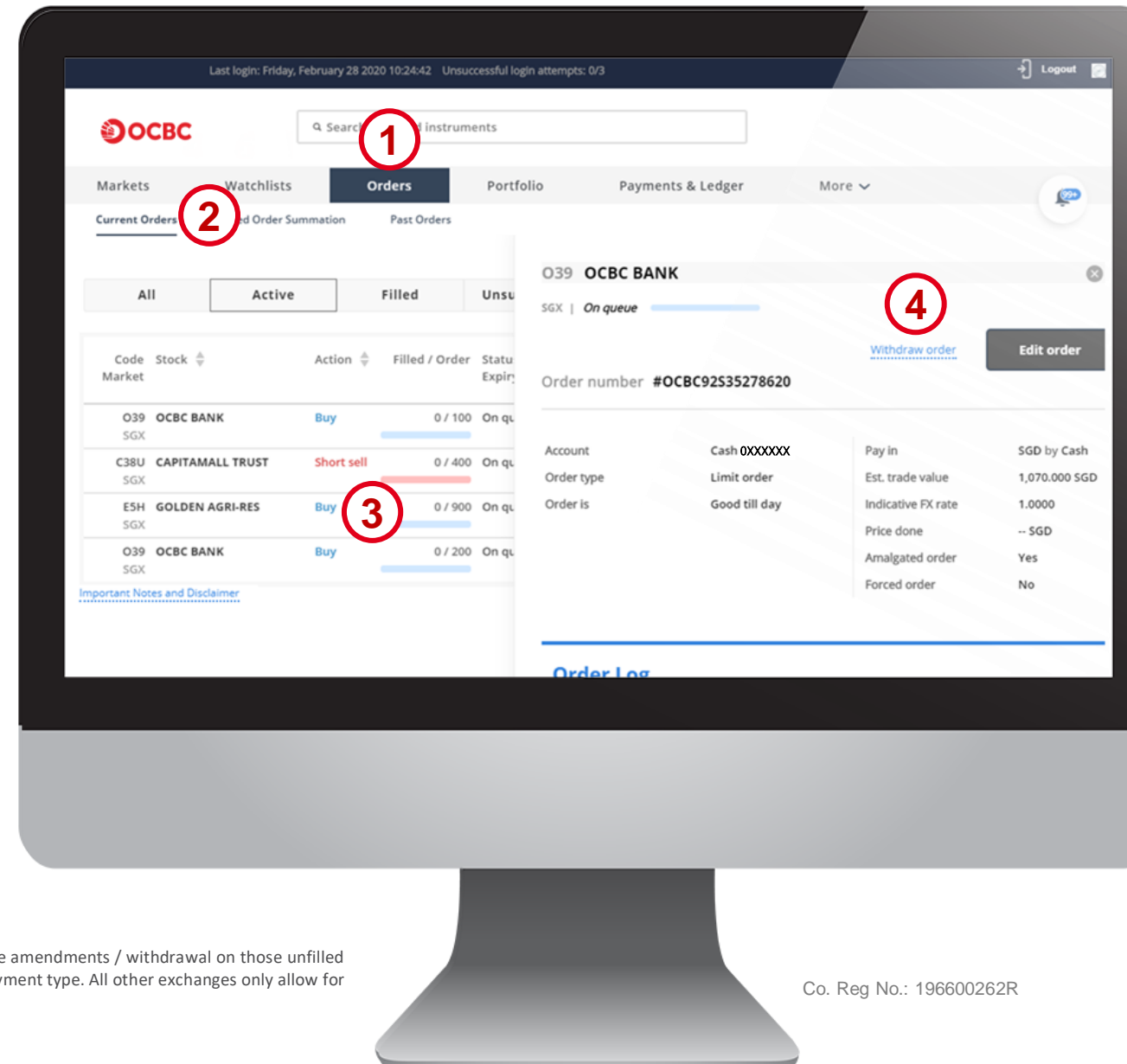
1 Select **Orders**

2 Click on **Current Orders**

3 Click on an order to view the order log and full order details

4 Select **Withdraw order**¹

5 Confirm the withdrawal²



Note:

¹ You can amend / withdraw your order provided that the order is not filled. If the order is partially filled, you can only make amendments / withdrawal on those unfilled quantity. Please note that only SGX orders allows for increment or reduction of price or quantity, and the amendment of payment type. All other exchanges only allow for reduction of the quantity and you cannot amend the other parameters like price and payment type.

² Refresh the order log to check that your order has been successfully withdrawn from the exchange queue.

ORDERS | Withdraw orders



Method 2

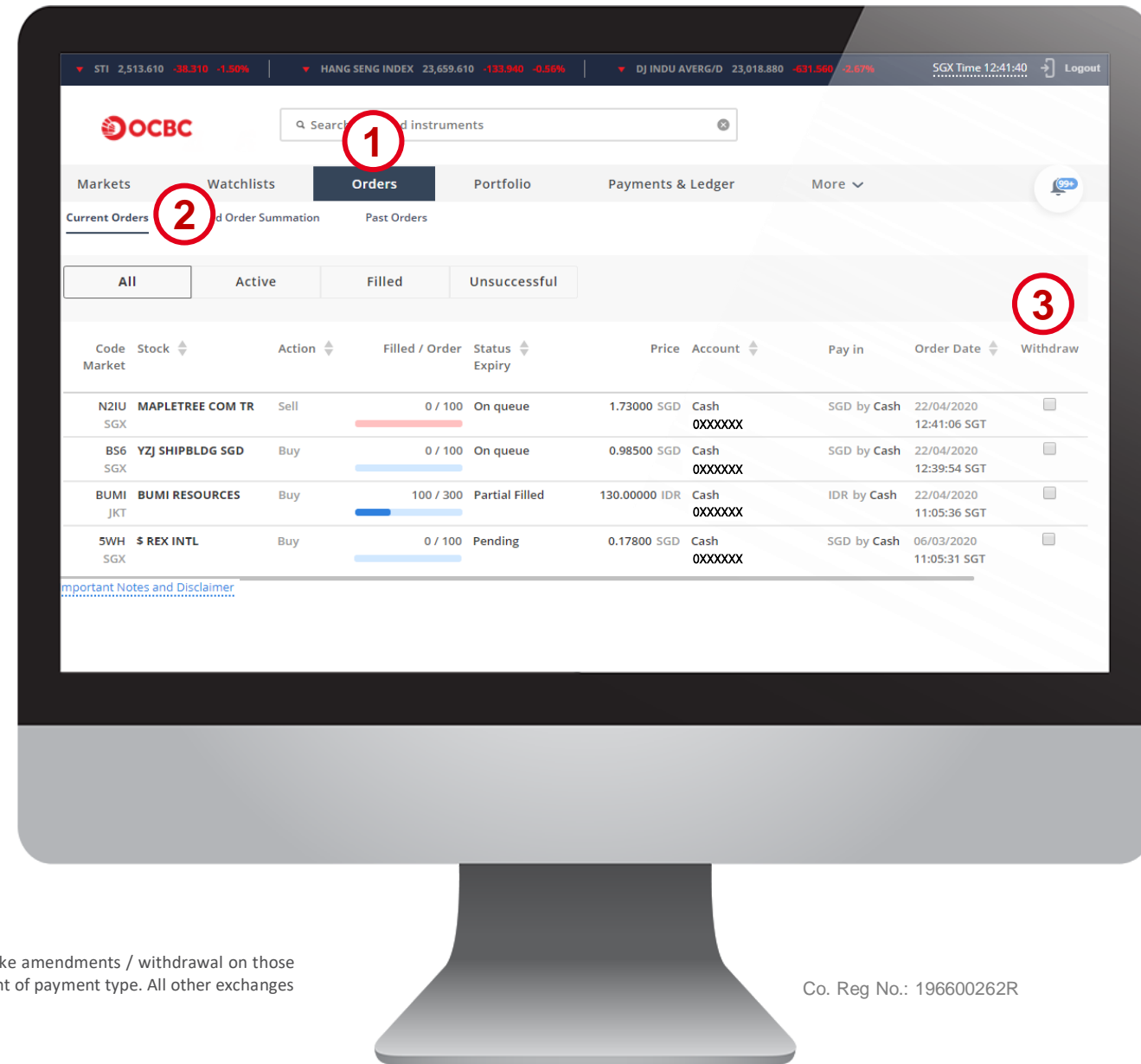
1 Select **Orders**

2 Click on **Current Orders**

3 Check the **Withdraw** box to cancel up to 5 orders submitted¹

4 Ensure the order reflects the correct status after the withdrawal

5 Confirm the withdrawal²



Note:

¹ You can amend / withdraw your order provided that the order is not filled. If the order is partially filled, you can only make amendments / withdrawal on those unfilled quantity. Please note that only SGX orders allows for increment or reduction of price or quantity, and the amendment of payment type. All other exchanges only allow for reduction of the quantity and you cannot amend the other parameters like price and payment type.

² Refresh the order log to check that your order has been successfully withdrawn from the exchange queue.

ORDERS | Amend orders



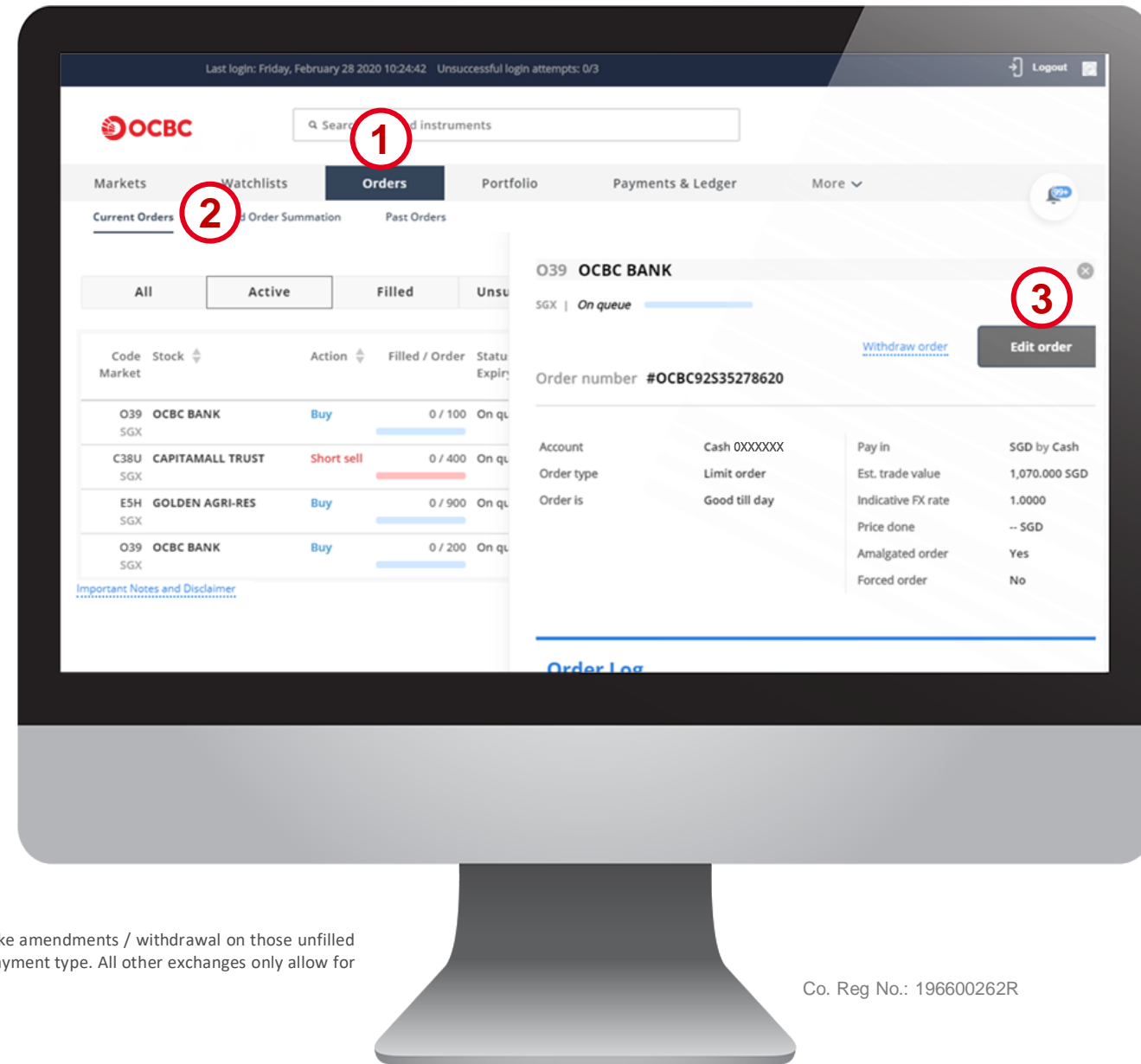
1 Select **Orders**

2 Click on **Current Orders**

3 Click **Edit order**¹ to amend order

4 Confirm the amendment

5 Ensure the order reflects the correct status after the withdrawal²



Note:

¹ You can amend / withdraw your order provided that the order is not filled. If the order is partially filled, you can only make amendments / withdrawal on those unfilled quantity. Please note that only SGX orders allows for increment or reduction of price or quantity, and the amendment of payment type. All other exchanges only allow for reduction of the quantity and you cannot amend the other parameters like price and payment type.

² Refresh the order log to check that your order amendment has been successfully received by the exchange.

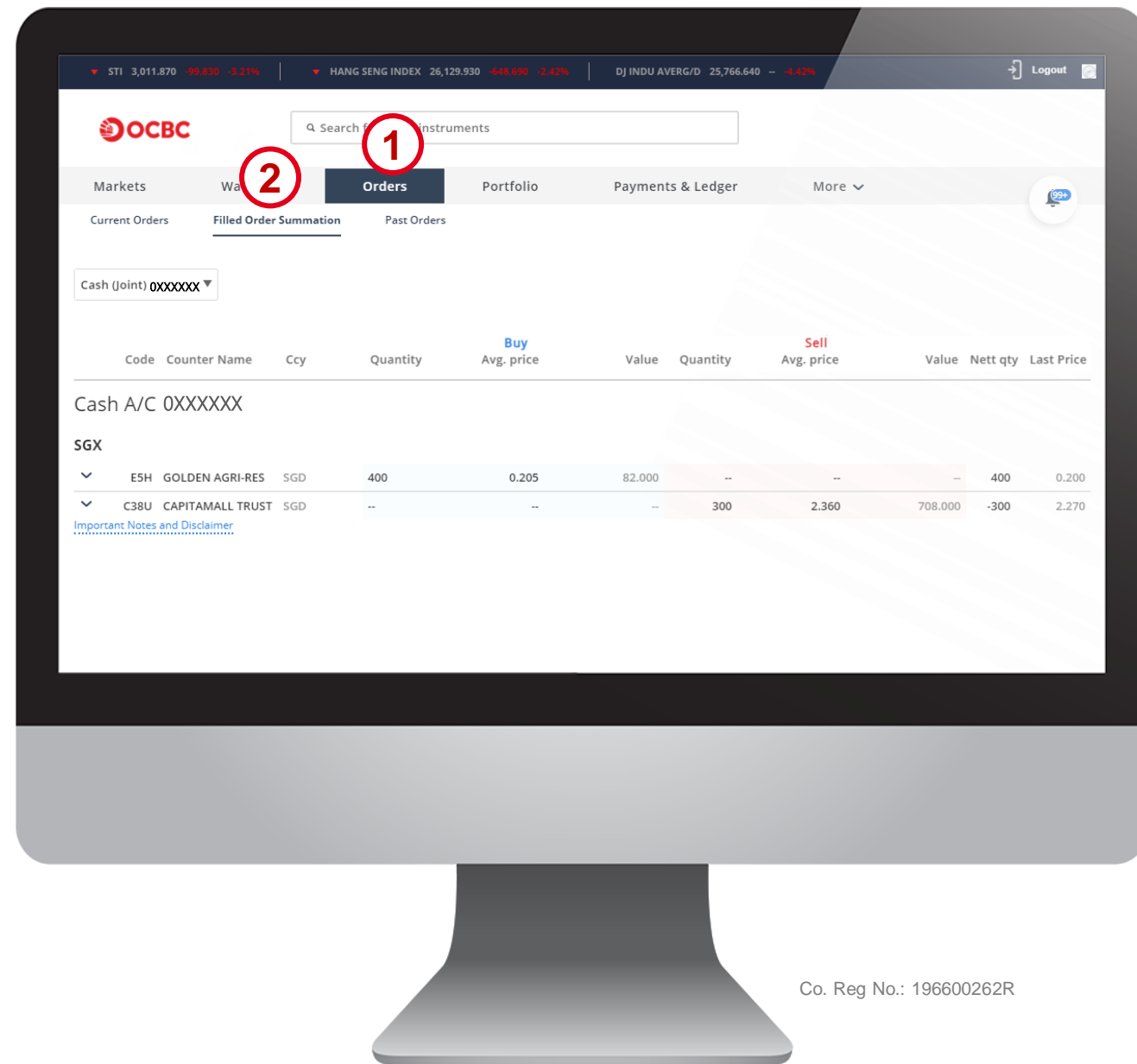
ORDERS | Filled order summation



1 Select Orders

2 Click on Filled Order Summation

(This allows you to view the total filled quantity of shares with the Weighted Average Price for the day)



ORDERS | Past orders

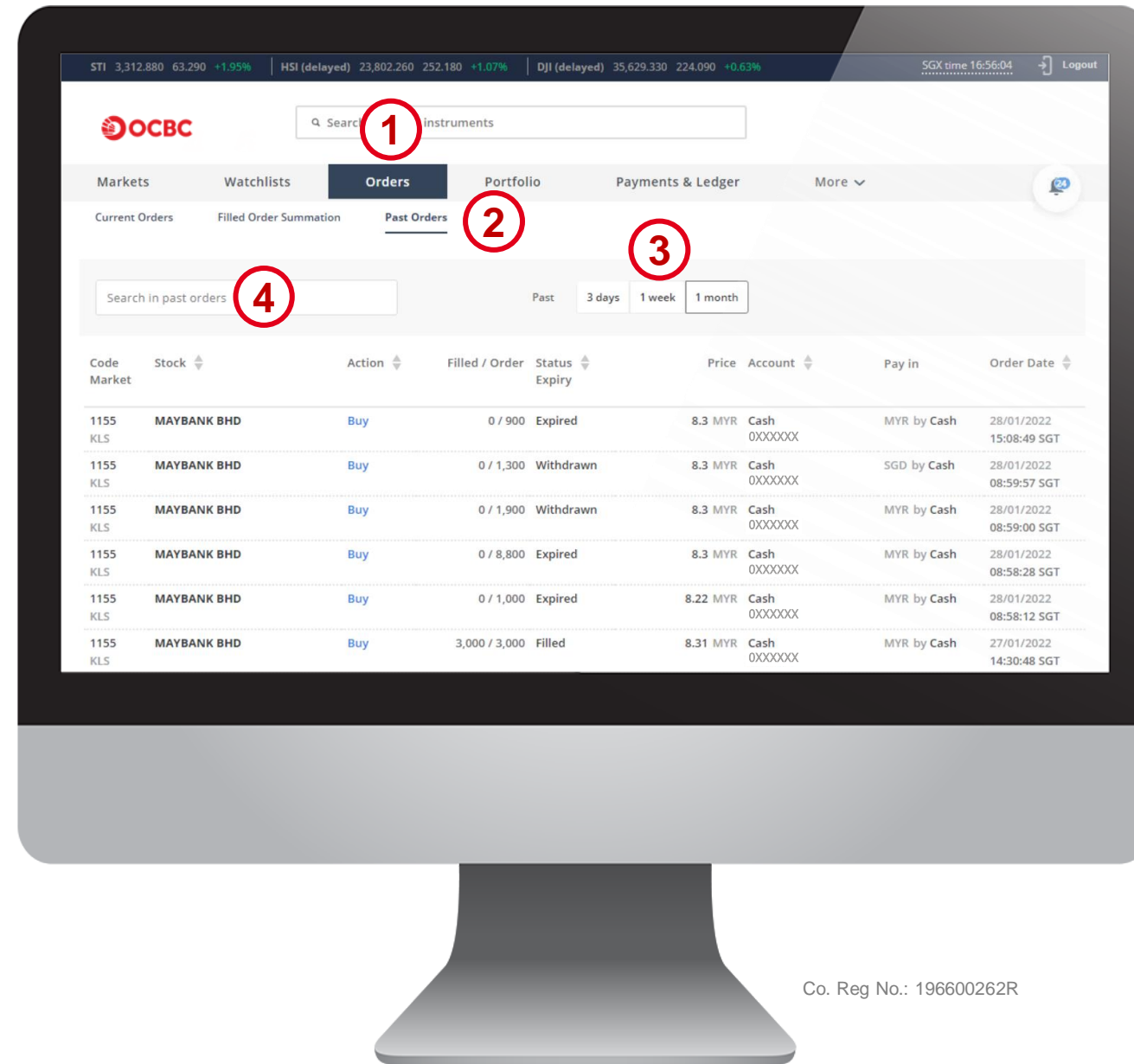


1 Select **Orders**

2 Click on **Past Orders**

3 Toggle between your desired timeframe

4 Search for a specific order



PORTFOLIO | Non-Custodised Portfolio



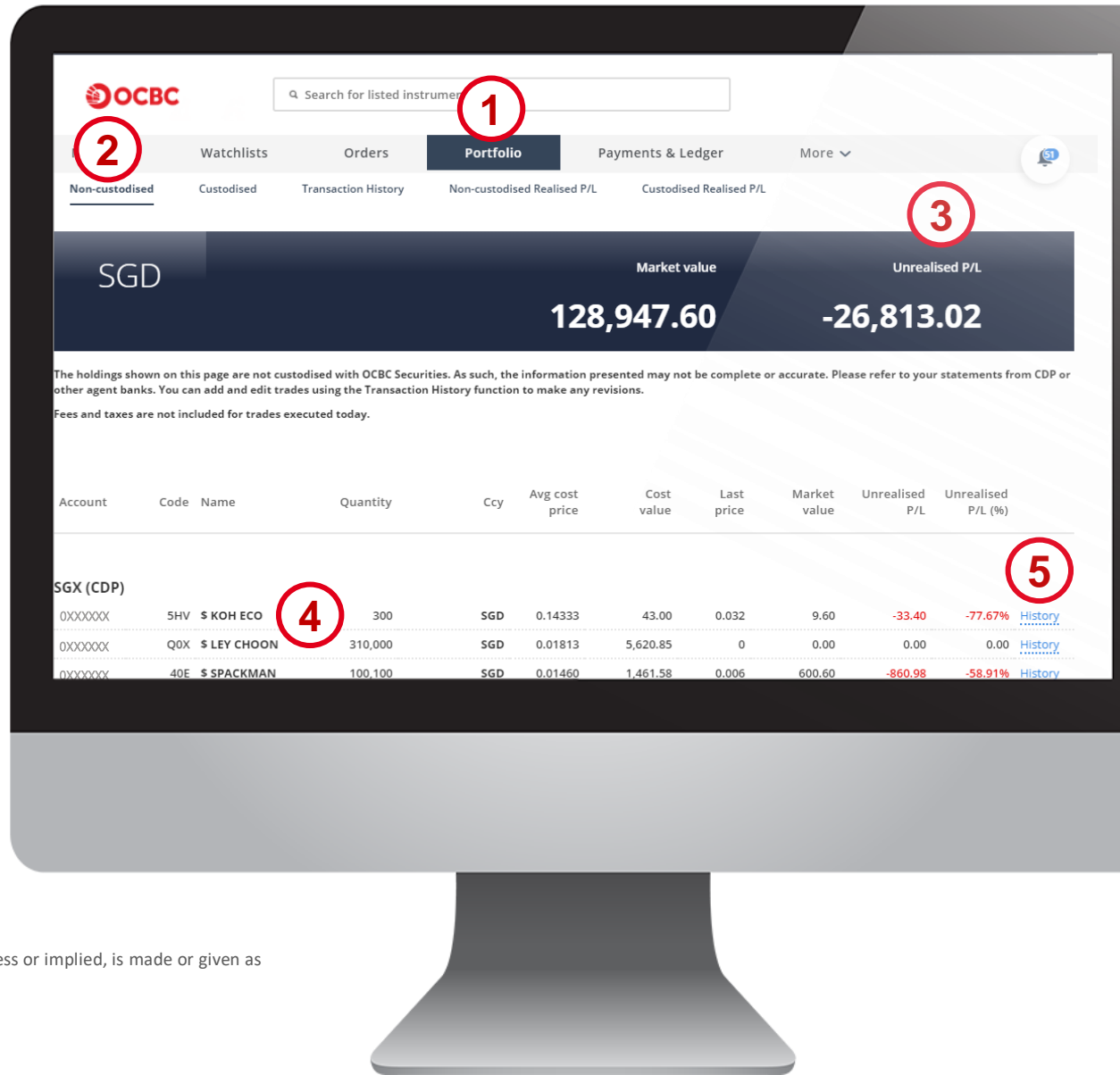
1 Select **Portfolio**

2 Click on **Non-Custodised**¹

3 View your Non-Custodised Portfolio
Unrealised P/L

4 Click on a counter to open the counter
information ticket

5 Click on **History** to view the trade history



Note:

¹ Please note that the information provided is an indicative representation of your portfolio. No representation or warranty, express or implied, is made or given as to, and no reliance should be placed on the completeness, accuracy or fairness of the information or opinions contained therein.

Your Non-Custodised Portfolio is sorted by trading account, exchange, and payment method – Cash, CPF, SRS.

Shares custodised by OSPL e.g. foreign market shares, will not be displayed here.

PORTFOLIO | Custodised Portfolio



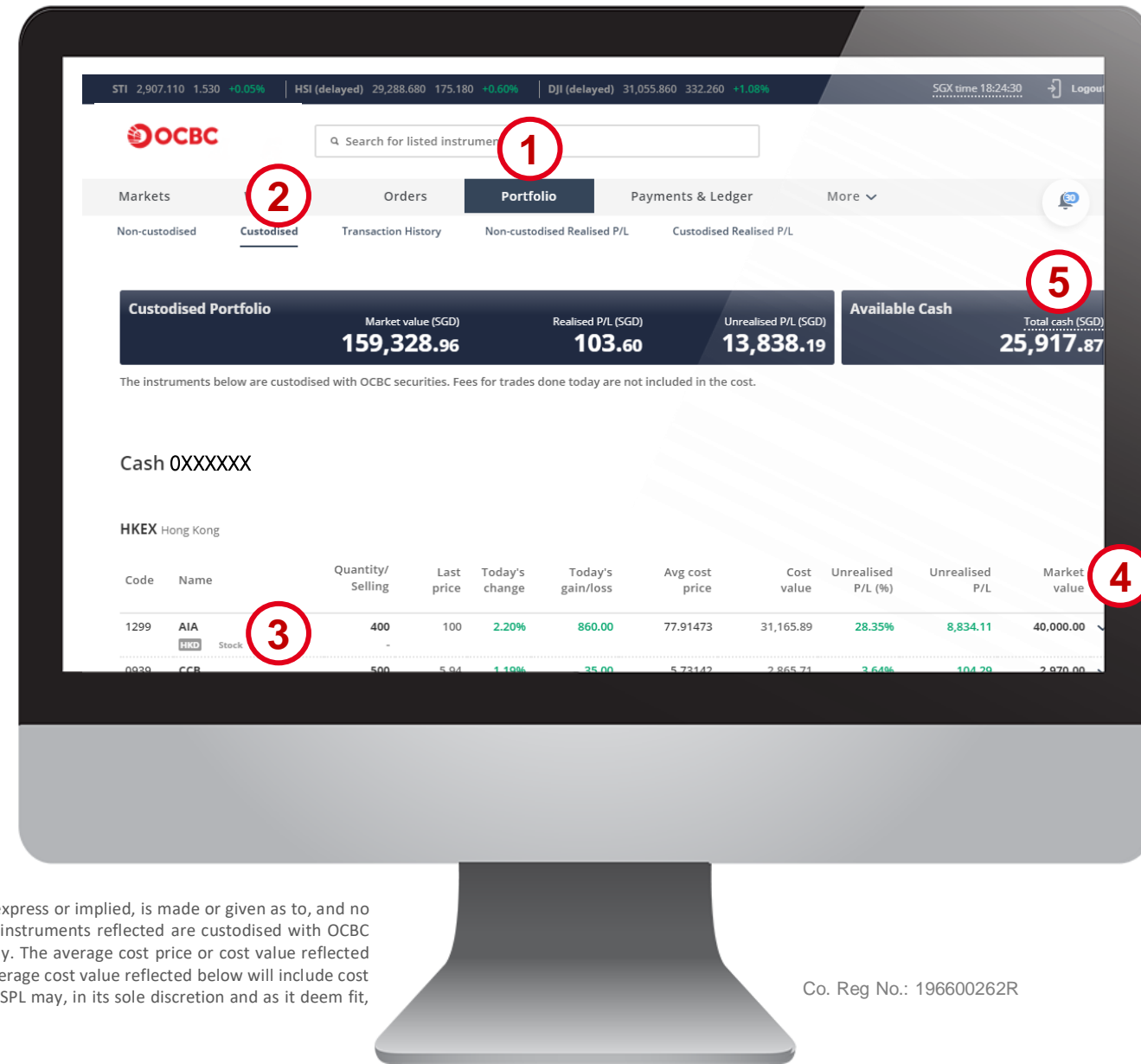
1 Select **Portfolio**

2 Click on **Custodised**¹

3 Click on a counter to open the counter information ticket

4 Click on  to view the counter history

5 Click on **Total cash (SGD)** to view the trust account balance



Note:

¹ Please note that the information provided is an indicative representation of your portfolio. No representation or warranty, express or implied, is made or given as to, and no reliance should be placed on the completeness, accuracy or fairness of the information or opinions contained therein. The instruments reflected are custodised with OCBC Securities. For avoidance of doubt, fees for trades done on a particular day will not be reflected in the cost on the same day. The average cost price or cost value reflected below will include cost price or cost value (as the case may be) adjustments made by you. For any share/stock transfer, the average cost value reflected below will include cost value adjustments made by you, however if no cost value information was provided during such your share/stock transfer, OSPL may, in its sole discretion and as it deem fit, adopt the cost value associated with the relevant share/stocks transfer as at the previous day closing price of such transfer.

PORTFOLIO | Custodised Portfolio



Description

1) **Avg cost price:** Weighted average price of counter

2) **Cost value (overall):** Quantity x weighted average price¹

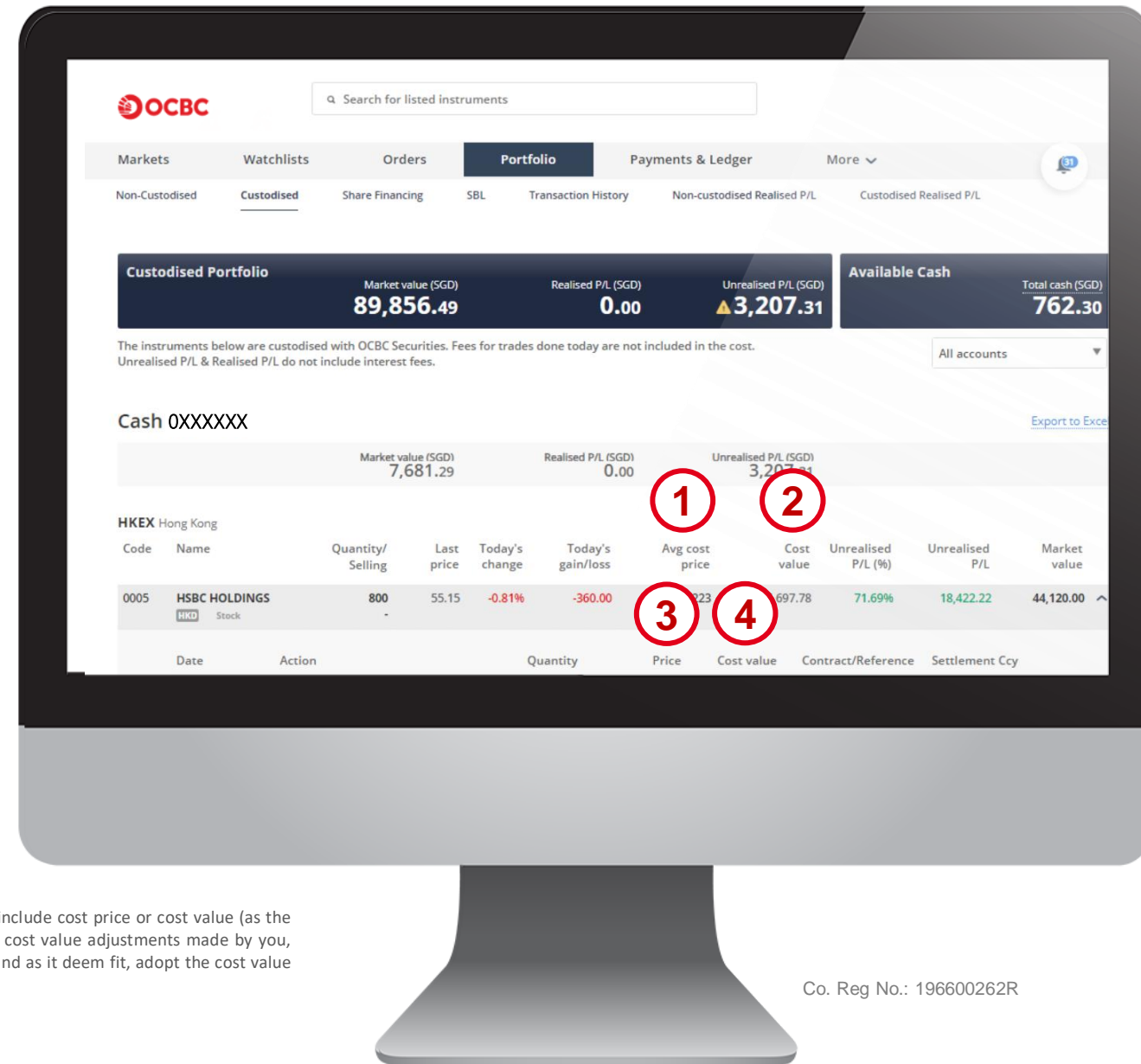
3) **Price:** Transaction done price

4) **Cost value (transaction):** Cost value of the transaction net of fees and charges²

Note:

¹ The instruments reflected are custodised with OCBC Securities. The average cost price or cost value reflected below will include cost price or cost value (as the case may be) adjustments made by you. For any share/stock transfer, the average cost value reflected below will include cost value adjustments made by you, however if no cost value information was provided during such your share/stock transfer, OSPL may, in its sole discretion and as it deem fit, adopt the cost value associated with the relevant share/stocks transfer as at the previous day closing price of such transfer.

² For avoidance of doubt, fees for trades done on a particular day will not be reflected in the cost on the same day.



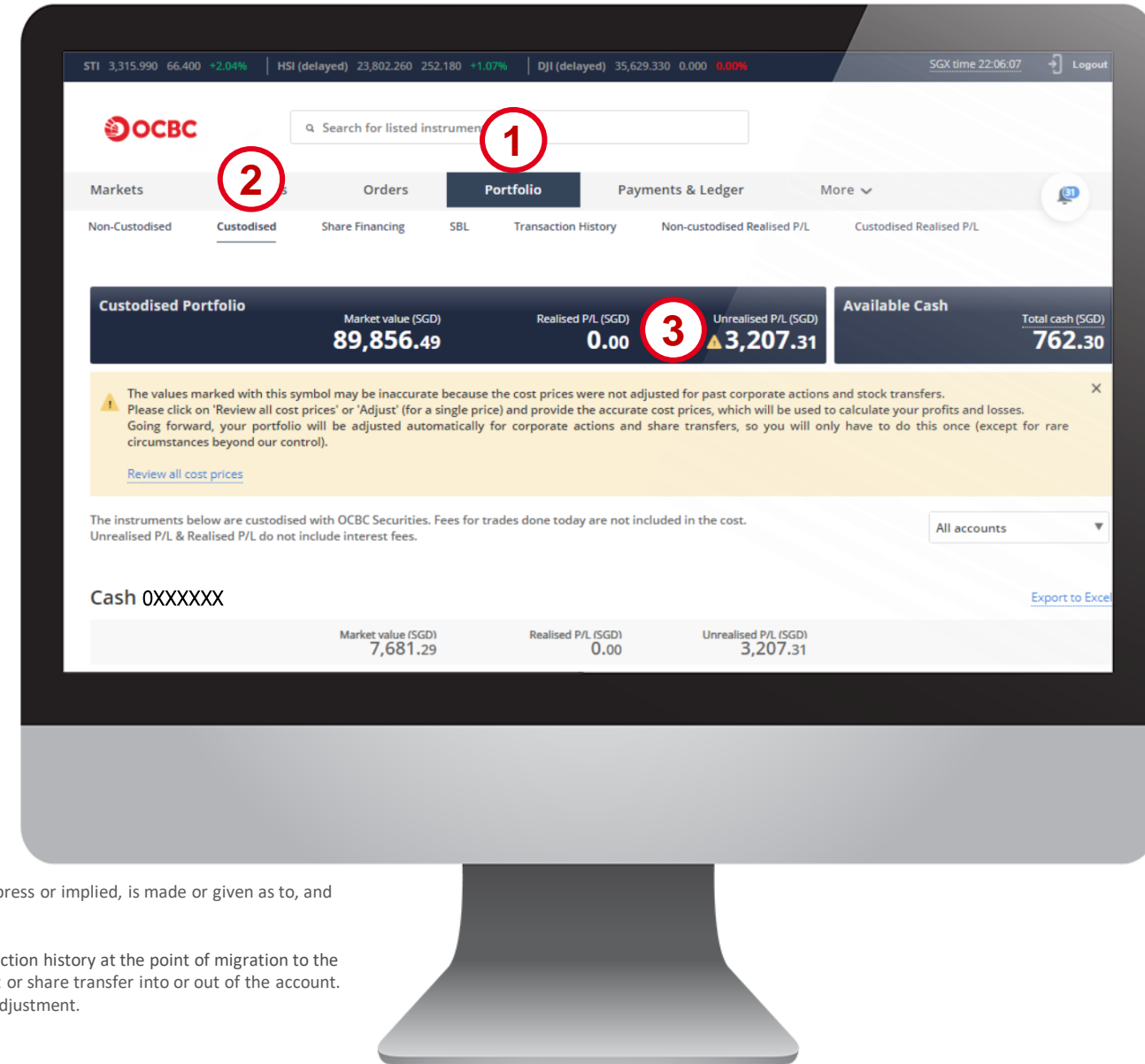
PORTFOLIO | Custodised Portfolio > Adjusting cost



1 Select Portfolio

2 Click on Custodised¹

3 ⚠ Indicates that cost price of a counter is likely to be inaccurate²



Note:

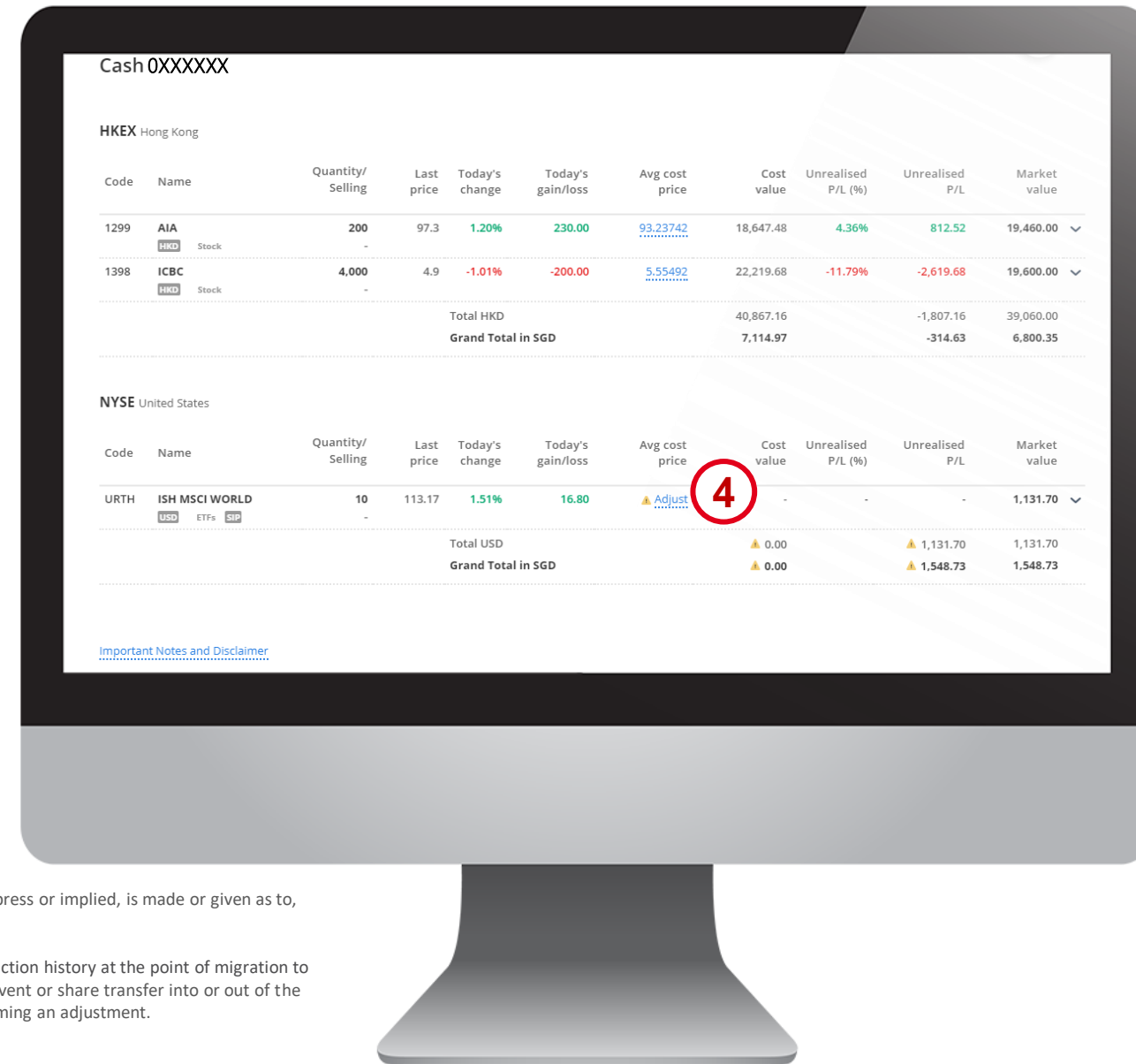
¹ Please note that the information provided is an indicative representation of your portfolio. No representation or warranty, express or implied, is made or given as to, and no reliance should be placed on the completeness, accuracy or fairness of the information or opinions contained therein.

² If you see a warning indicator, it means that the share quantity custodised with OSPL and the net share quantity in your transaction history at the point of migration to the new platform is not the same, this may be due to various reasons including but not limited to a historical corporate action event or share transfer into or out of the account. In order to calculate an accurate profit and loss, you are required to provide the accurate cost price or value by performing an adjustment.

PORTFOLIO | Custodised Portfolio¹ > Adjusting cost



4 Click on **Adjust** to correct the cost price or cost value of the holdings²



The image shows a computer monitor displaying the OCBC portfolio management interface. The screen is divided into two main sections: HKEX Hong Kong and NYSE United States. Each section contains a table of holdings with columns for Code, Name, Quantity/Selling, Last price, Today's change, Today's gain/loss, Avg cost price, Cost value, Unrealised P/L (%), Unrealised P/L, and Market value. In the NYSE section, the holding 'ISH MSCI WORLD' has an 'Adjust' button next to its 'Avg cost price' column, which is circled in red with the number '4' inside. Below the tables, there is a link for 'Important Notes and Disclaimer'.

Cash 0XXXXXX										
HKEX Hong Kong										
Code	Name	Quantity/ Selling	Last price	Today's change	Today's gain/loss	Avg cost price	Cost value	Unrealised P/L (%)	Unrealised P/L	Market value
1299	AIA HKD Stock	200	97.3	1.20%	230.00	93.23742	18,647.48	4.36%	812.52	19,460.00
1398	ICBC HKD Stock	4,000	4.9	-1.01%	-200.00	5.55492	22,219.68	-11.79%	-2,619.68	19,600.00
Total HKD							40,867.16		-1,807.16	39,060.00
Grand Total in SGD							7,114.97		-314.63	6,800.35
NYSE United States										
Code	Name	Quantity/ Selling	Last price	Today's change	Today's gain/loss	Avg cost price	Cost value	Unrealised P/L (%)	Unrealised P/L	Market value
URTH	ISH MSCI WORLD USD ETFs SIP	10	113.17	1.51%	16.80	Adjust	-	-	-	1,131.70
Total USD							0.00		1,131.70	1,131.70
Grand Total in SGD							0.00		1,548.73	1,548.73

[Important Notes and Disclaimer](#)

Note:

¹ Please note that the information provided is an indicative representation of your portfolio. No representation or warranty, express or implied, is made or given as to, and no reliance should be placed on the completeness, accuracy or fairness of the information or opinions contained therein.

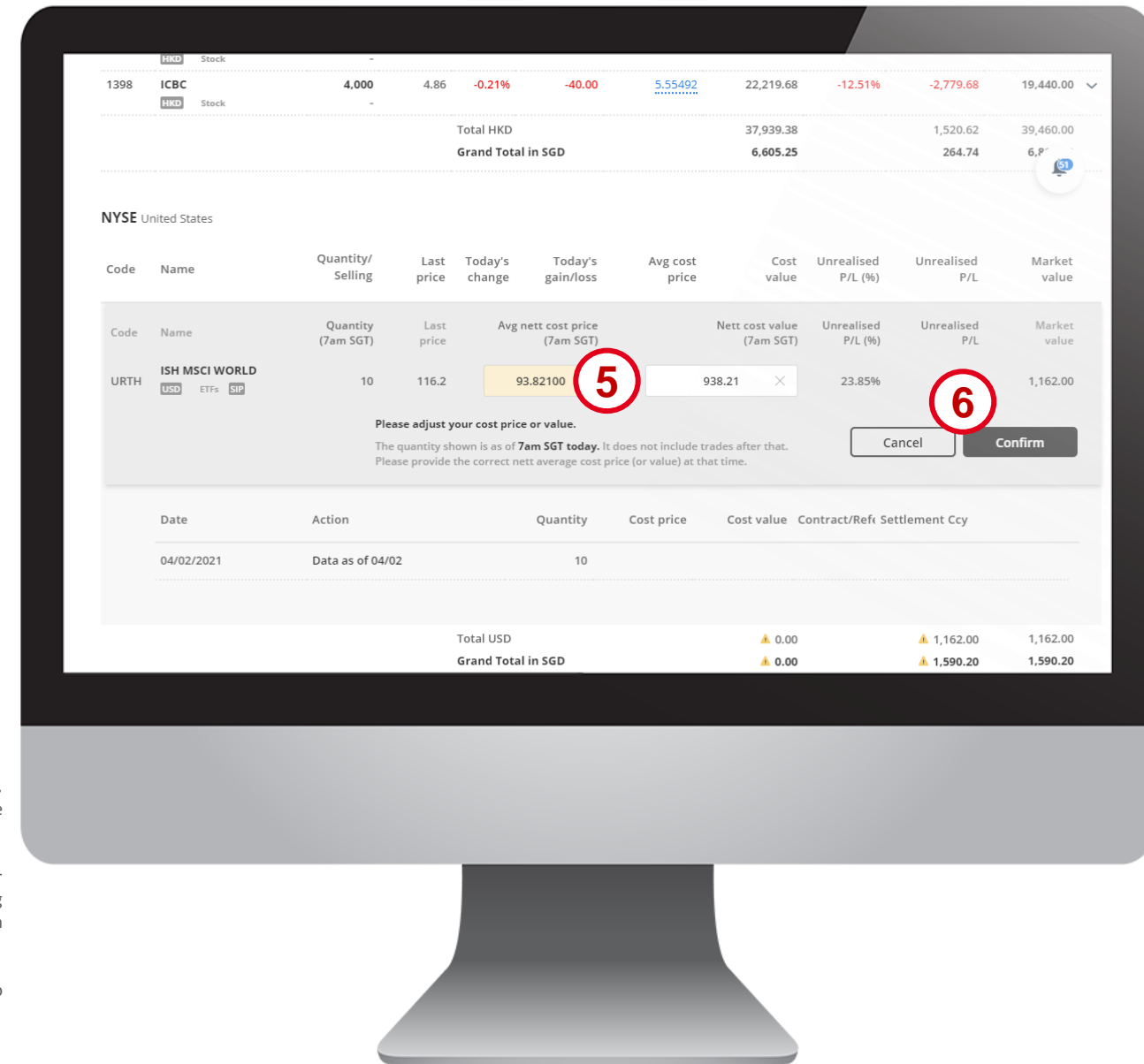
² If you see a warning indicator, it means that the share quantity custodised with OSPL and the net share quantity in your transaction history at the point of migration to the new platform is not the same, this may be due to various reasons including but not limited to a historical corporate action event or share transfer into or out of the account. In order to calculate an accurate profit and loss, you are required to provide the accurate cost price or value by performing an adjustment.

PORTFOLIO | Custodised Portfolio¹ > Adjusting cost



5 The cost from your historical buy or sell transactions with OSPL will be automatically populated. As needed, key in an average cost price that produces the correct cost value for your holdings². This will be used to calculate your profit and loss³.

6 Click on **Cancel** to discard any changes or **Confirm** to save your price adjustment



Note:

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² If you see a warning indicator, it means that the share quantity custodised with OSPL and the net share quantity in your transaction history at the point of migration to the new platform is not the same, this may be due to various reasons including but not limited to a historical corporate action event or share transfer into or out of the account. In order to calculate an accurate profit and loss, you are required to provide the accurate cost price or value by performing an adjustment.

³ Going forward, your portfolio will be adjusted automatically for corporate actions and share transfers. You should not have to make adjustments except in rare instances beyond our control.

PORTFOLIO | Transaction history



1 Select **Portfolio**

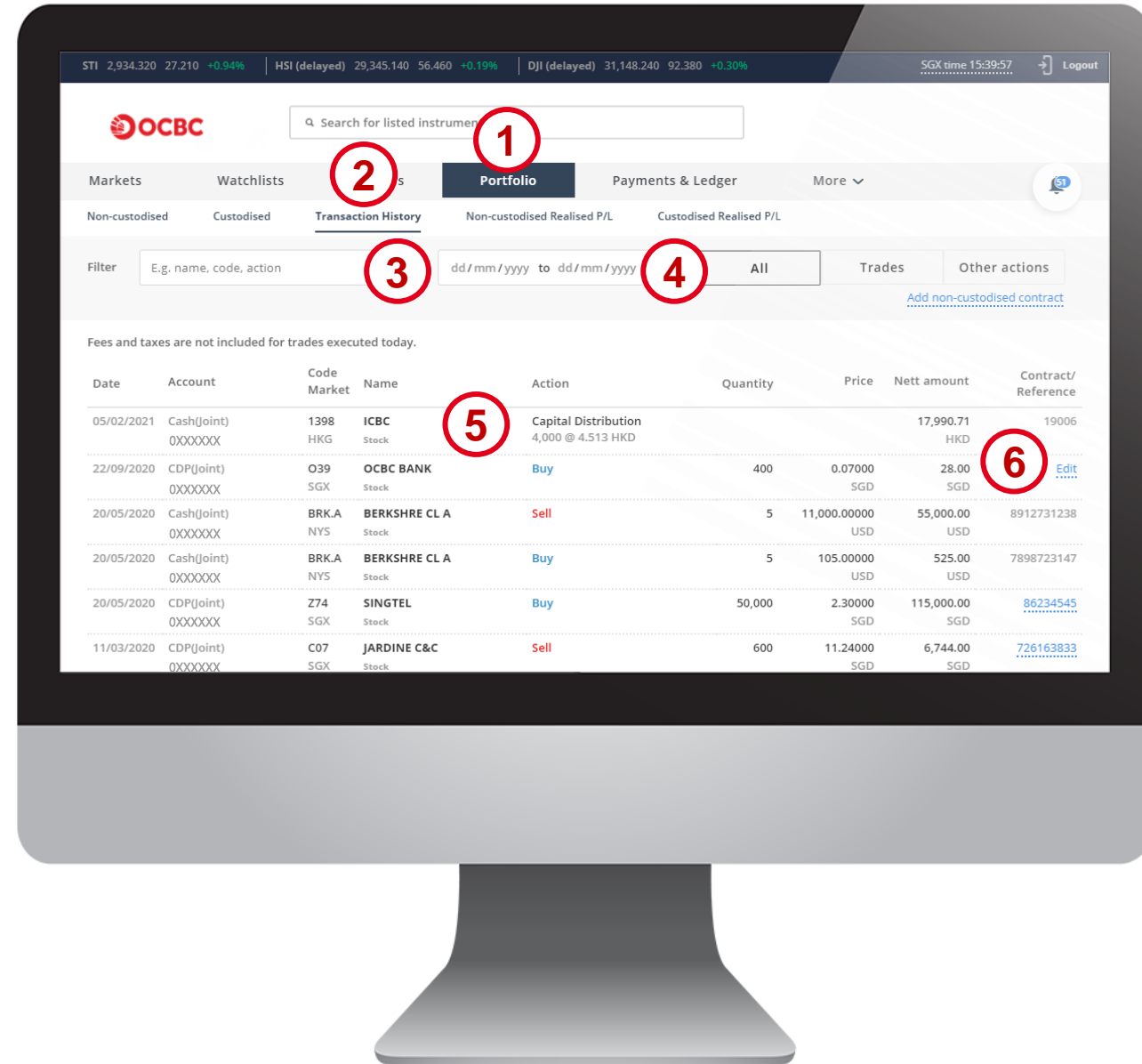
2 Click on **Transaction History**

3 Search for a specific trade

4 Search for trades according to your desired timeframe

5 Click on a trade to open the counter information

6 Click on **Contract/Reference**¹ to edit the trade's contract details



Note:

¹ This function is not available for shares that are custodied by OSPL, e.g. foreign market shares.

PORTFOLIO | Adding contracts



1 Select **Portfolio**

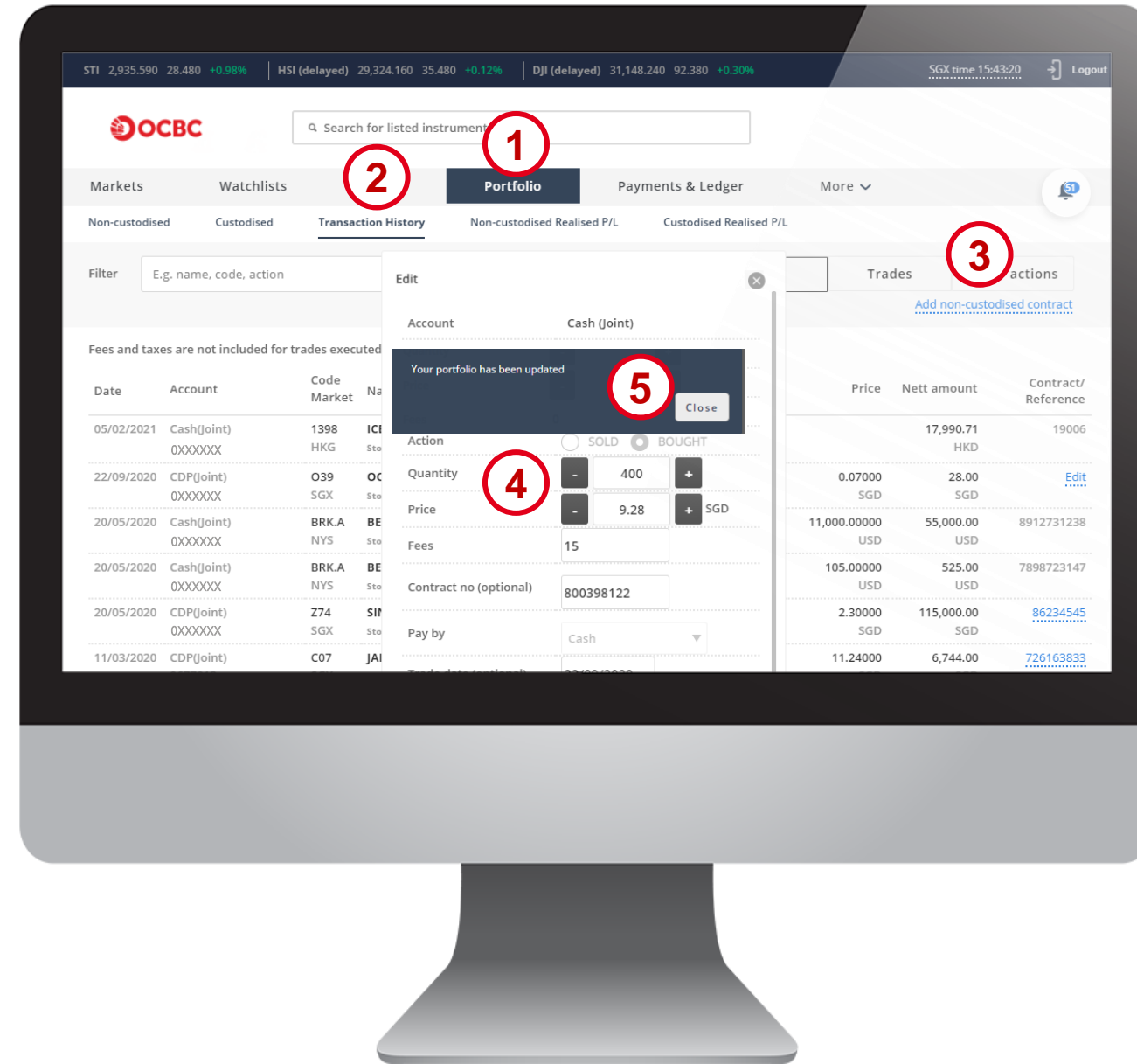
2 Click on **Transaction History**

3 Click on **Add non-custodised contract**¹

4 Fill in the applicable information. Click on **Submit** to add contract.

5 A pop-up will appear to confirm that your entry is successful. You can now view your added contract in your **Transaction History**.

(Changes made here are only for your Transaction History)



Note:

¹ This function is not available for shares that are custodised by OSPL, e.g. foreign market shares.

PORTFOLIO | Deleting contracts



1 Select **Portfolio**

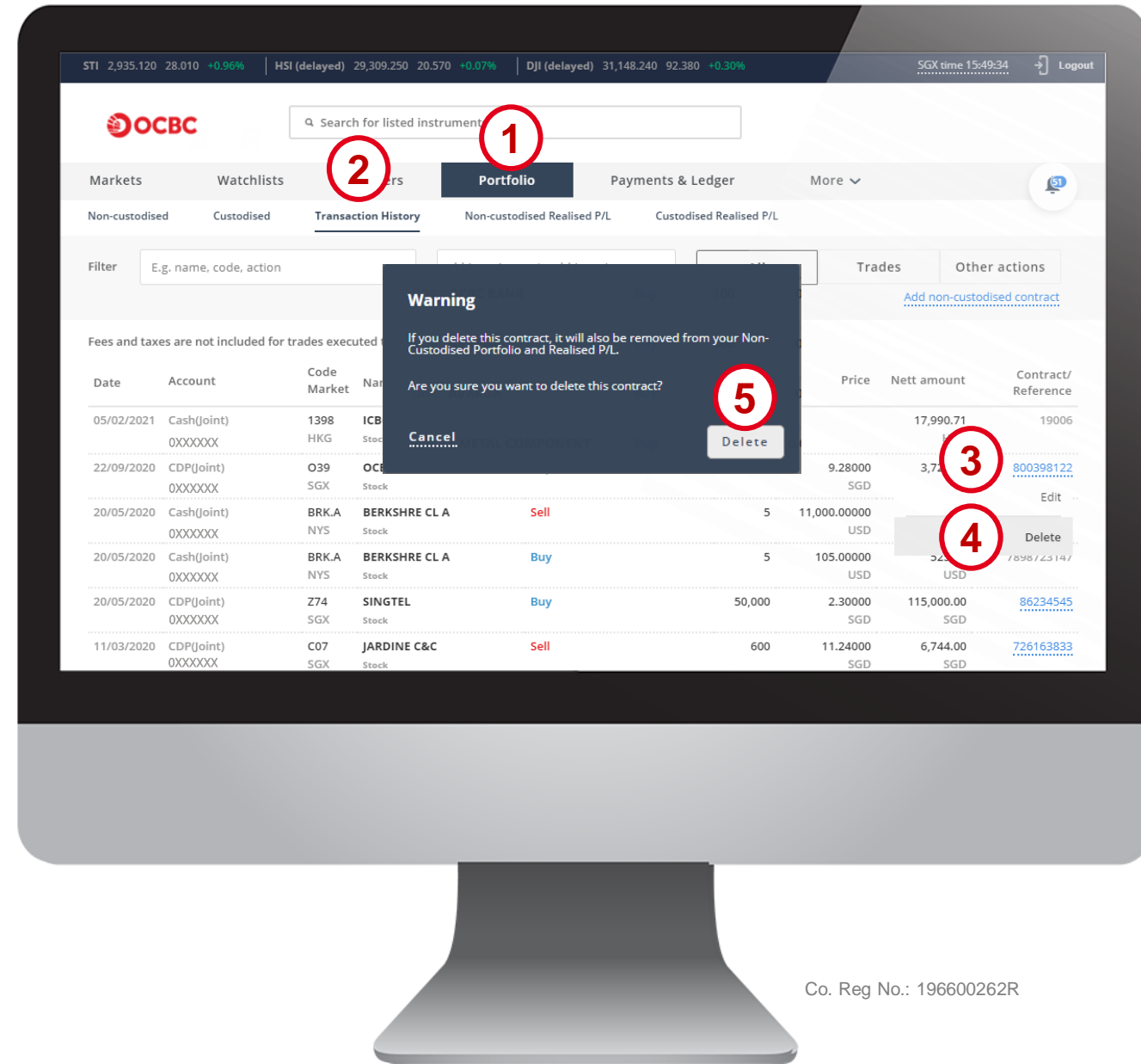
2 Click on **Transaction History**

3 Select contract to be deleted by clicking on **Contract/Reference**¹

4 Click **Delete** to remove specific trades

5 Click **Delete** when asked to confirm deletion of the contracts

(Contracts deleted will be removed from transaction history page with immediate effect)



Note:

¹ This function is not available for shares that are custodied by OSPL, e.g. foreign market shares.

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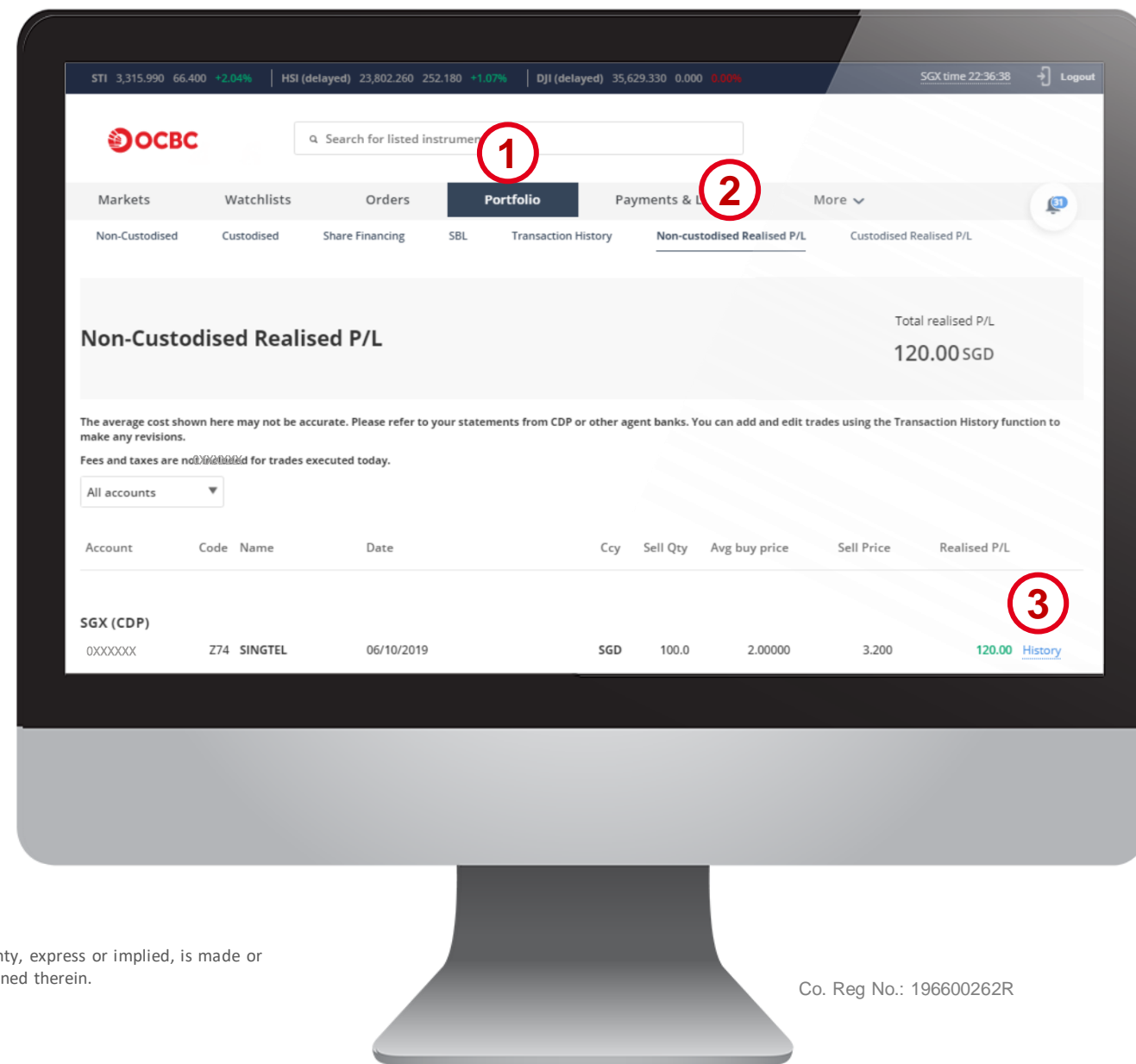
PORTFOLIO | Non-Custodised Realised P/L



1 Select **Portfolio**

2 Click on **Non-custodised Realised P/L**¹

3 Click on **History** to view previous Transaction History of the counter



Note:

¹ Please note that the information provided is an indicative representation of your portfolio. No representation or warranty, express or implied, is made or given as to, and no reliance should be placed on the completeness, accuracy or fairness of the information or opinions contained therein. Shares custodised by OSPL e.g. foreign market shares, will not be displayed here.

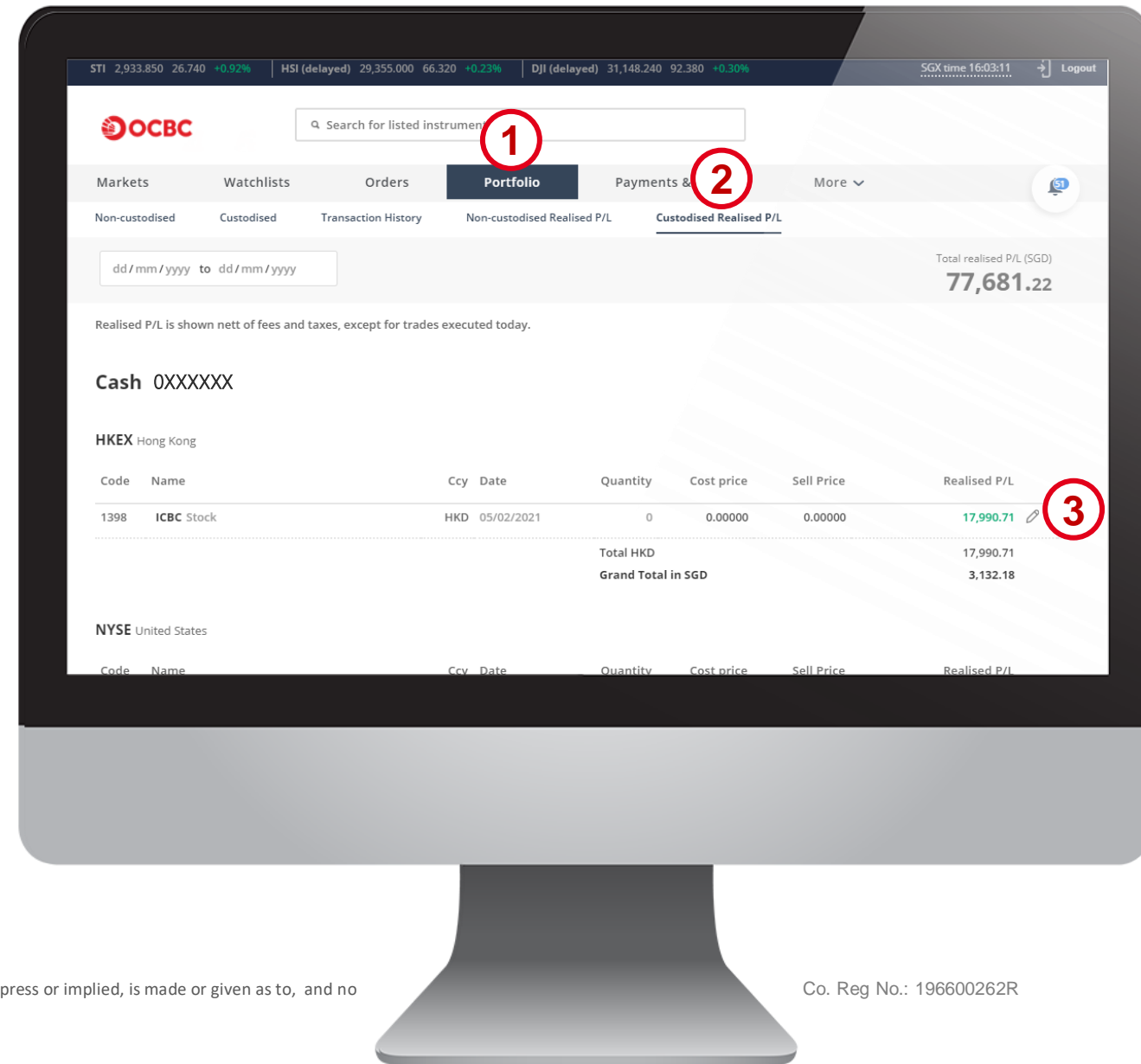
PORTFOLIO | Custodised Realised P/L



1 Select **Portfolio**

2 Click on **Custodised Realised P/L**¹

3 Click on the **Pencil icon** to adjust the total Realised P/L for the counter



Note:

¹ Please note that the information provided is an indicative representation of your portfolio. No representation or warranty, express or implied, is made or given as to, and no reliance should be placed on the completeness, accuracy or fairness of the information or opinions contained therein.

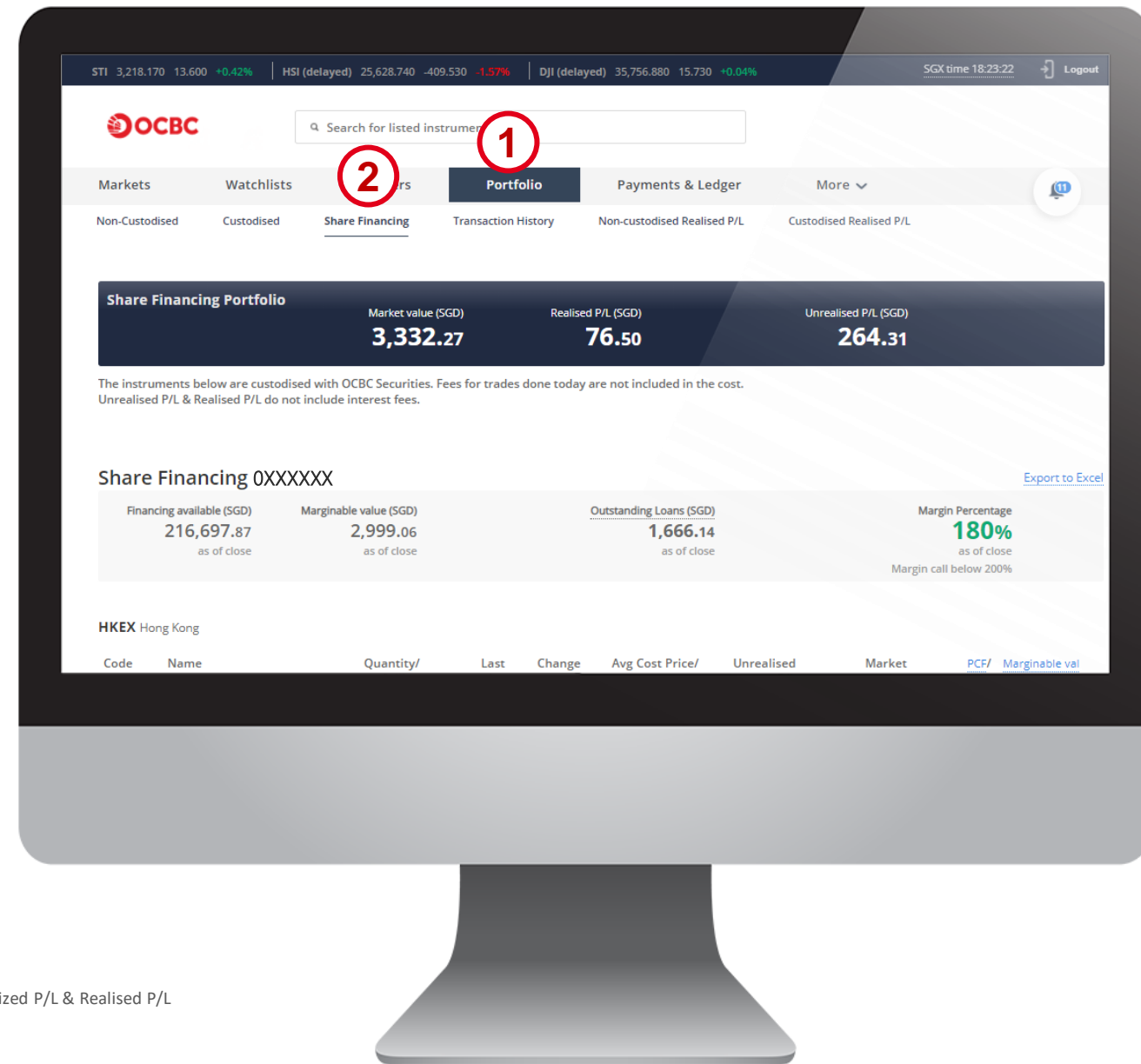
Co. Reg No.: 196600262R

PORTFOLIO | Share Financing



1 Select Portfolio

2 Click on Share Financing¹

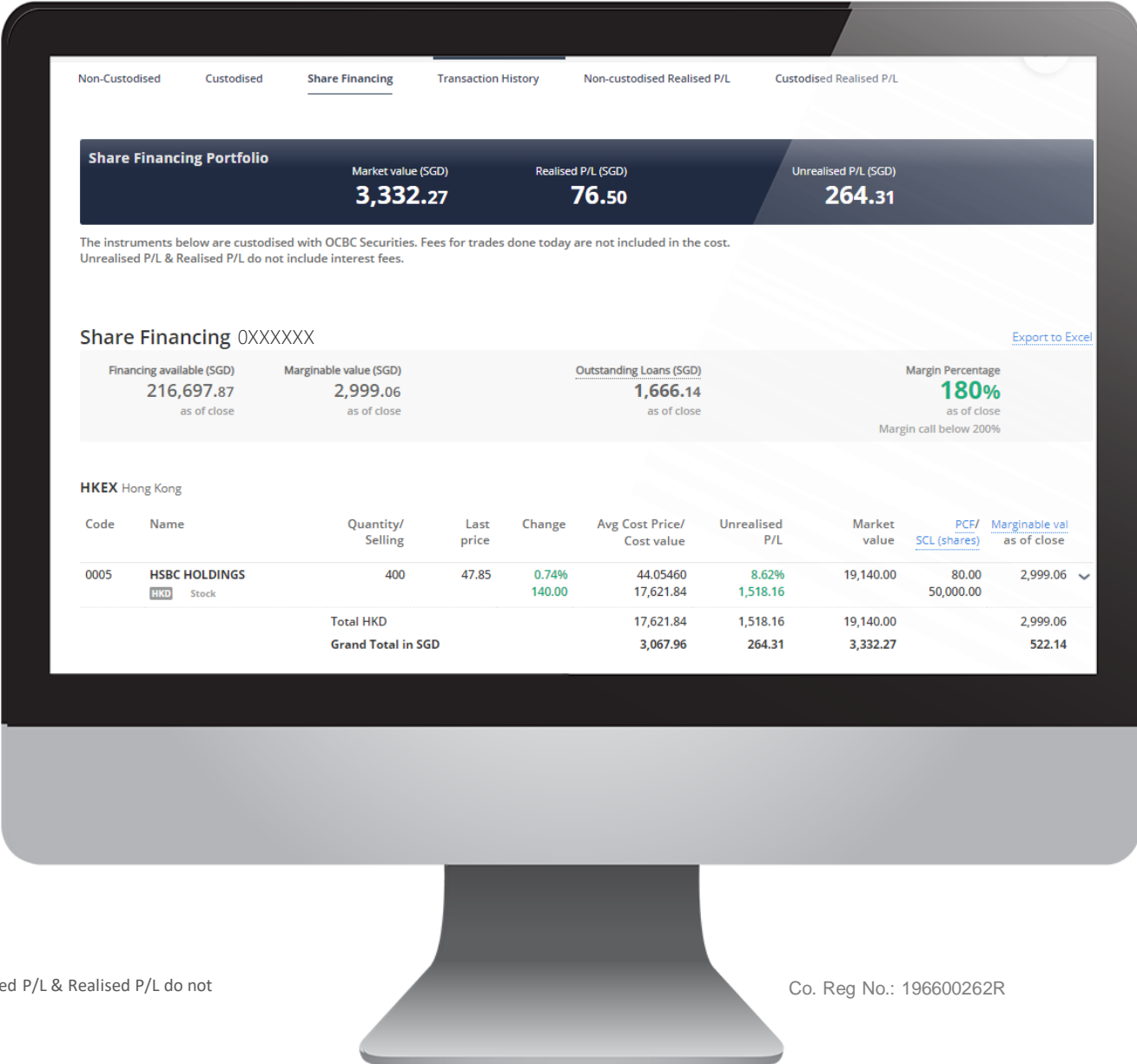


Note:

¹ The instruments below are custodised with OCBC Securities. Fees for trades done today are not included in the cost. Unrealized P/L & Realised P/L do not include interest charges.



3 Scroll down to view more details



Note:
¹ The instruments below are custodised with OCBC Securities. Fees for trades done today are not included in the cost. Unrealized P/L & Realised P/L do not include interest charges.

PORTFOLIO | Share Borrowing Lending



1 Select **Portfolio**

2 Click on **SBL** to view details of portfolio such as Borrowing limits, Marginable value, Cash collateral, Total collateral and Margin Percentage

The screenshot displays the OCBC Share Borrowing Lending interface. At the top, there's a navigation bar with the OCBC logo and a search bar. Below this is a menu with options: Markets, Watchlists, Orders, **Portfolio** (highlighted with a red circle 1), Payments & Ledger, and More. Under the Portfolio menu, there are sub-options: Non-Custodised, Custodised, Share Financing, **SBL** (highlighted with a red circle 2), Transaction History, Non-custodised Realised P/L, and Custodised Realised P/L. The main content area shows 'Securities Borrowing and Lending' with a table of key metrics and a table of borrowed counters.

Securities Borrowing and Lending 0XXXXXX					Export to Excel
Borrowing limits (SGD)	Marginable value (SGD)	Cash collateral(SGD)	Total collateral (SGD)	Margin Percentage	
2,873,302.00	1,073,536.00	909,451.80	1,982,987.80	1565.1	
as of close	as of close	as of close	as of close	as of close	Margin call below 140%

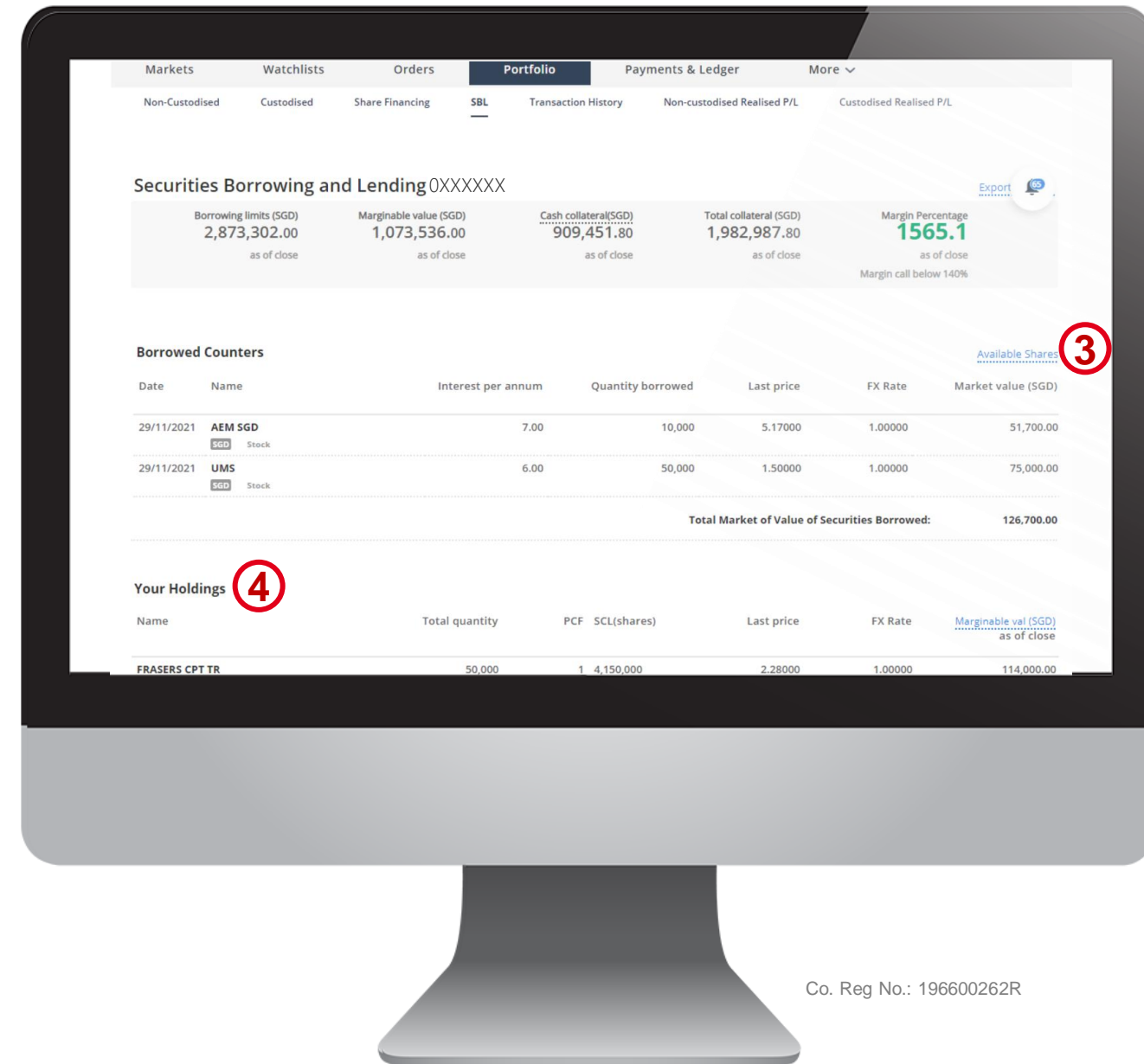
Borrowed Counters							Available Shares
Date	Name	Interest per annum	Quantity borrowed	Last price	FX Rate	Market value (SGD)	
29/11/2021	AEM SGD	7.00	10,000	5.17000	1.00000	51,700.00	
	SGD Stock						
29/11/2021	UMS	6.00	50,000	1.50000	1.00000	75,000.00	
	SGD Stock						
Total Market of Value of Securities Borrowed:							126,700.00

PORTFOLIO | Share Borrowing Lending



3 Under **Borrowed Counters**, view the shares that you have borrowed. Click on **“Available Shares”** to view a list of shares that are available for further borrowing.

4 View collateral details under **Your Holdings**



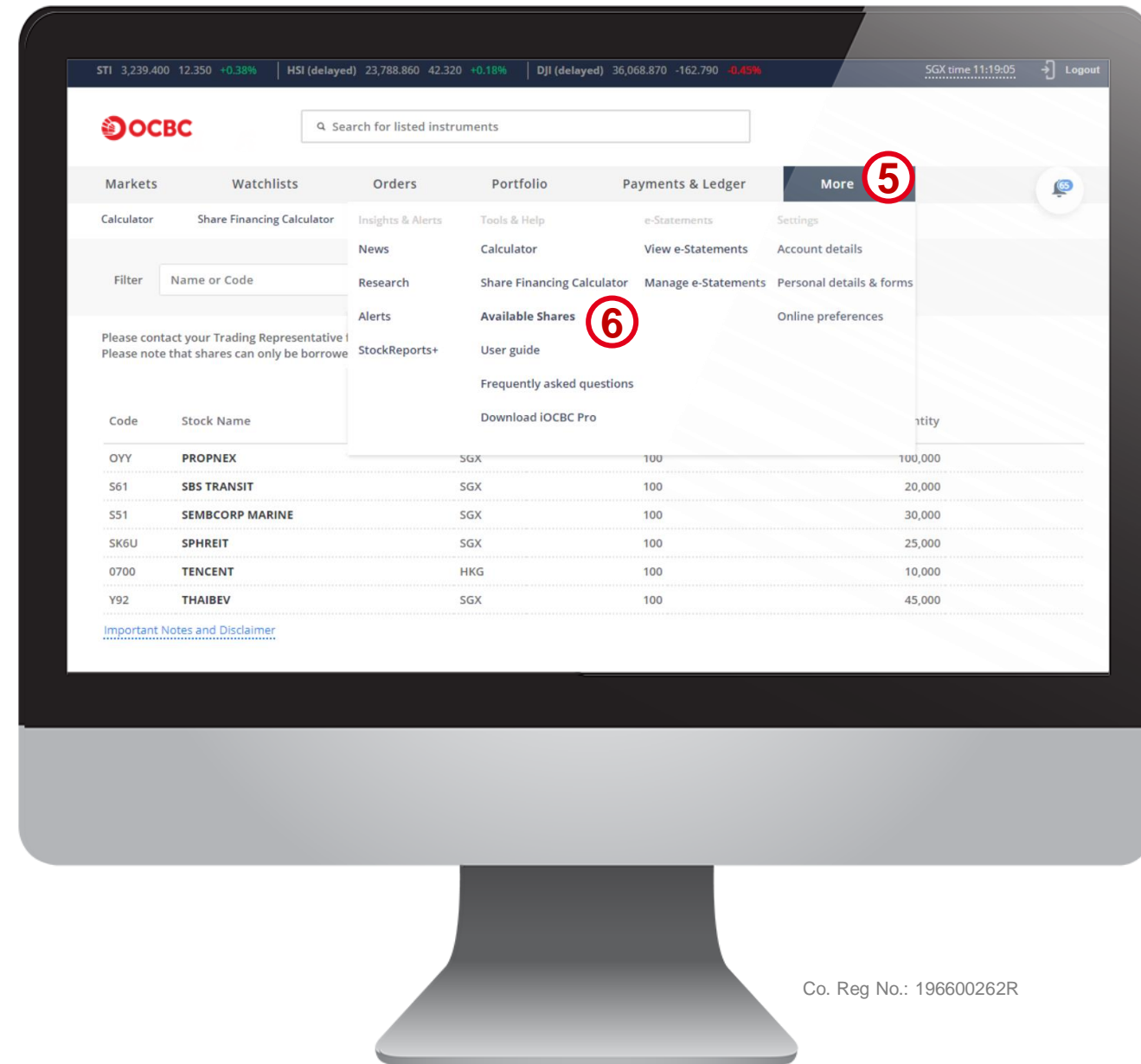
PORTFOLIO | Share Borrowing Lending



Alternatively,

5 Click on **More**

6 Select **Available Shares** to view the list of available shares to borrow

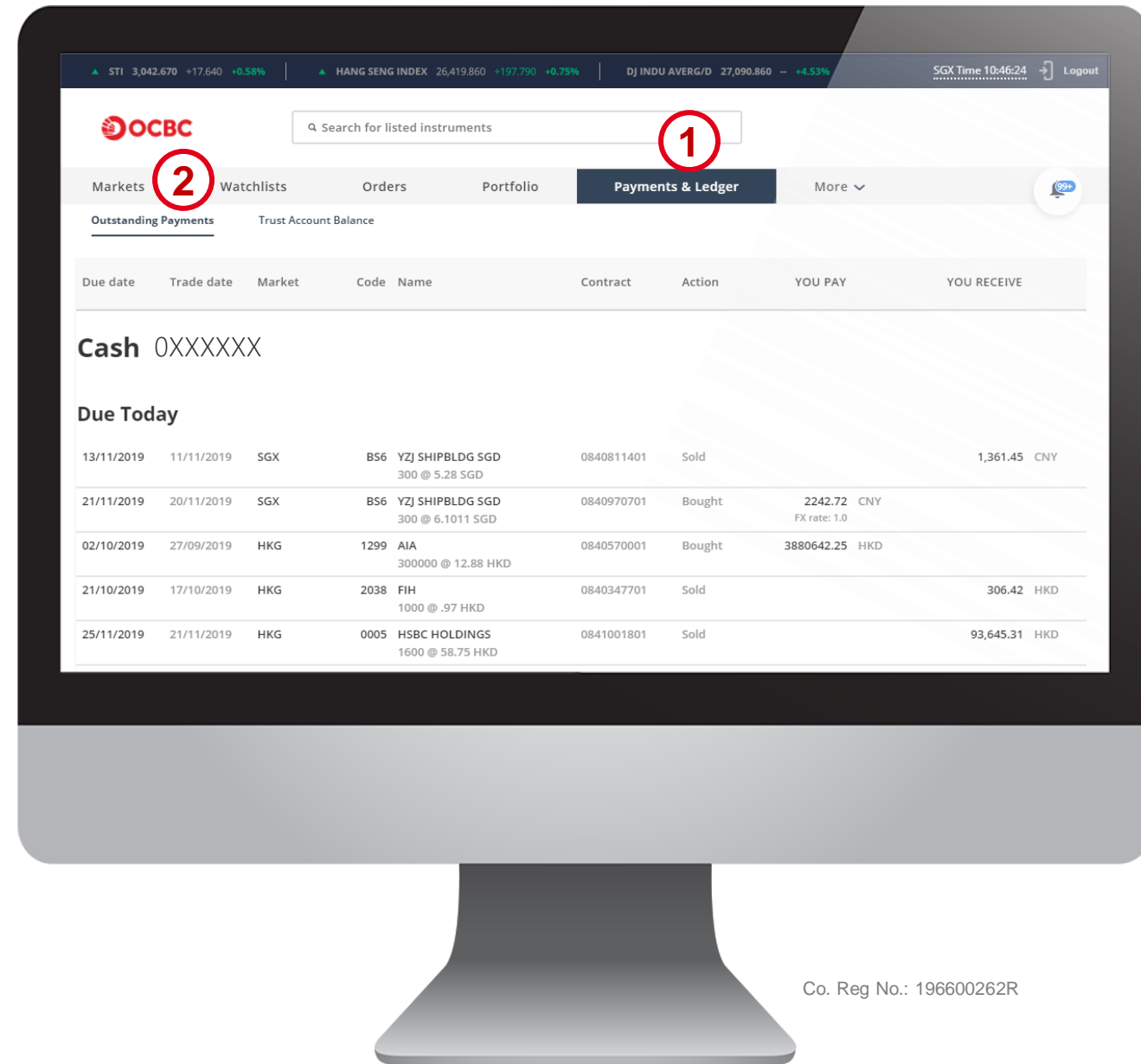


PAYMENTS & LEDGER | Outstanding payments



1 Select Payments & Ledger

2 Click on Outstanding Payments

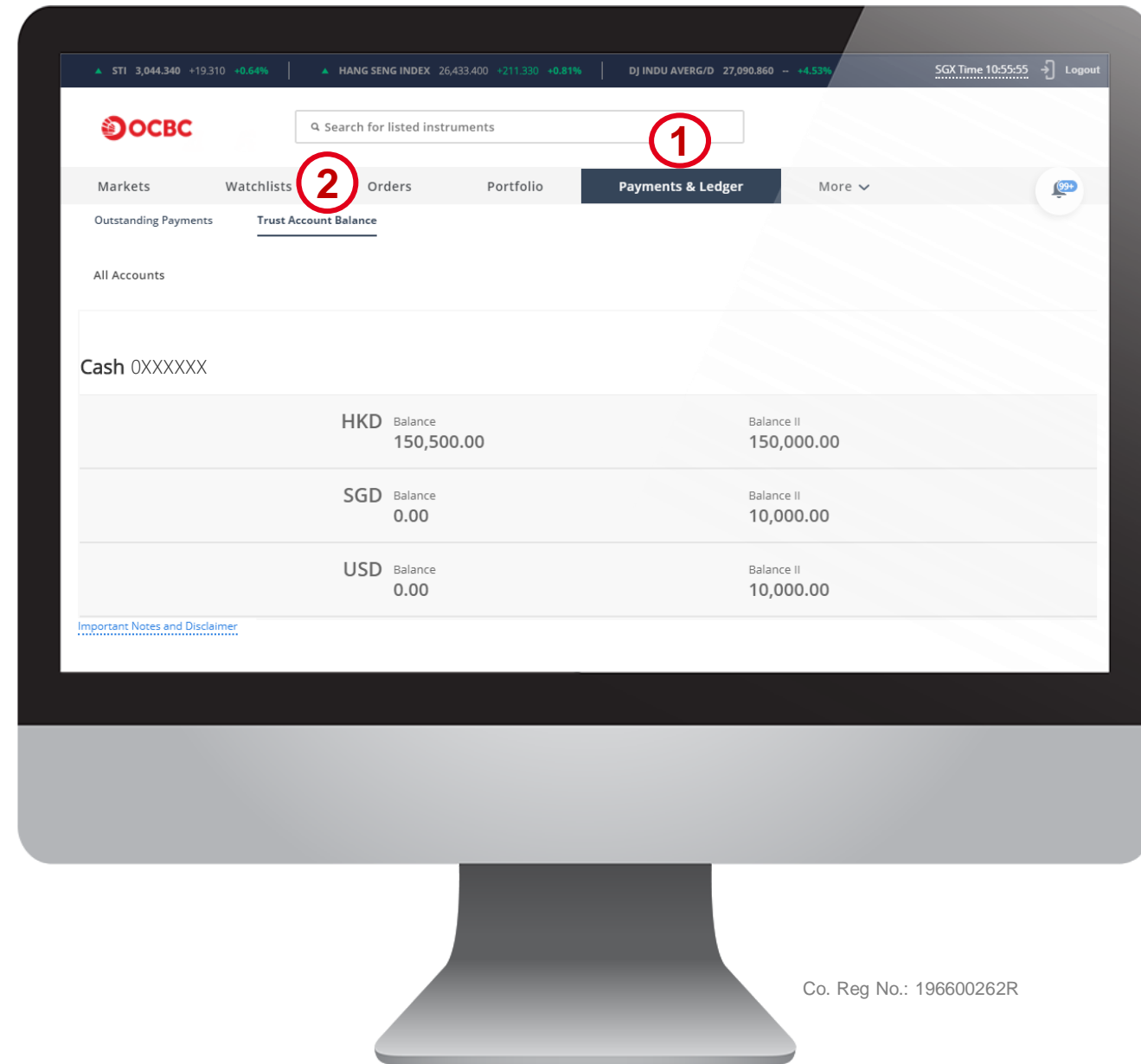


PAYMENTS & LEDGER | Trust account balance



1 Select Payments & Ledger

2 Click on Trust Account Balance



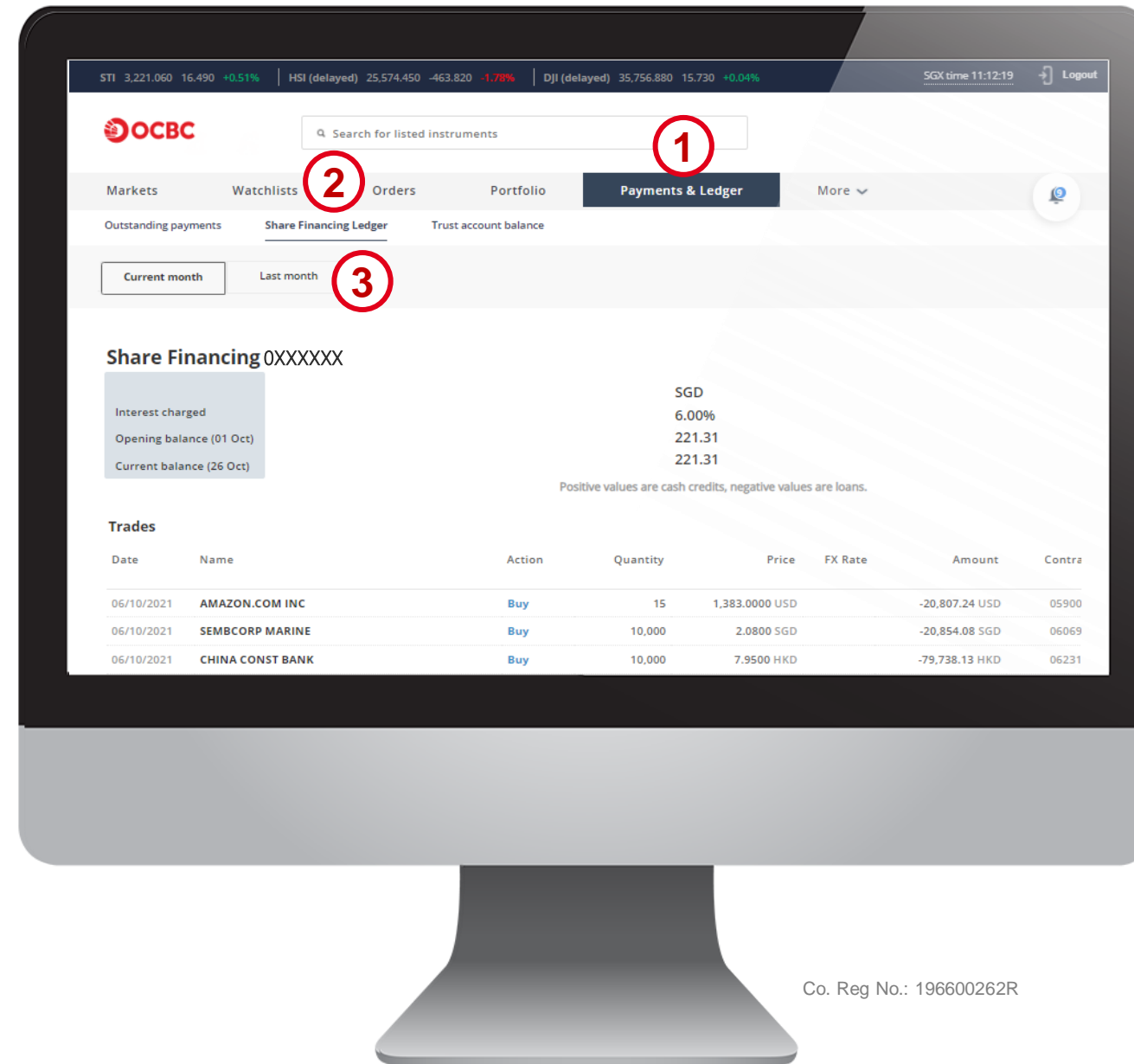
PAYMENTS & LEDGER | Share Financing Ledger



1 Select **Payments & Ledger**

2 Click on **Share Financing Ledger**

3 Click on either **Current month** or **Last month**

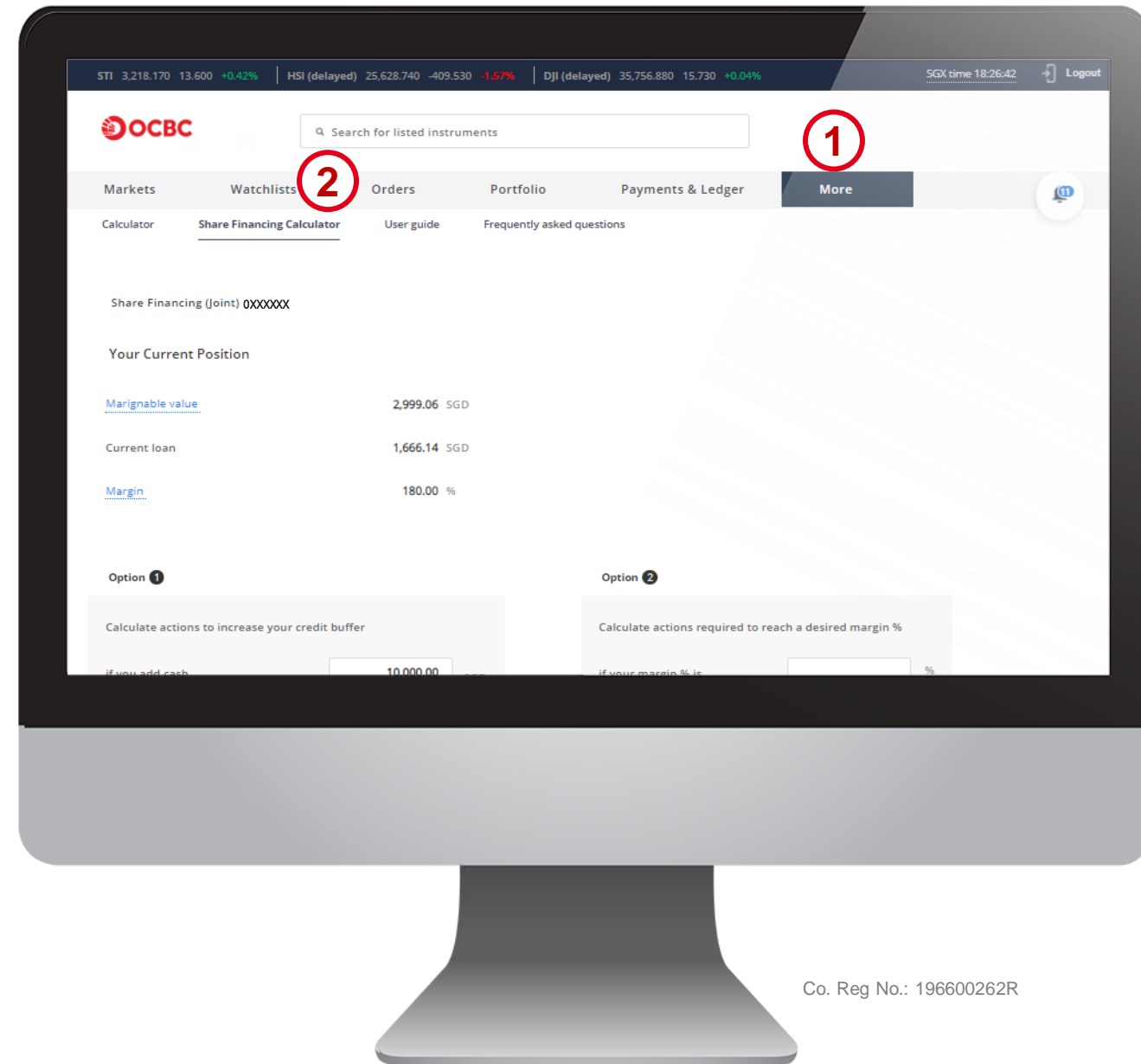


TOOLS | Share Financing Calculator



1 Select **More**

2 Click on **Share Financing Calculator**



TOOLS | Share Financing Calculator



3 Enter desired figures in **Option 1** to calculate actions to increase credit buffer, and click on **Calculate**.

Option 1 **3**

Calculate actions to increase your credit buffer

if you add cash SGD
and/or
if you add shares worth SGD

Calculate

Financing available up to 61,666.16 SGD

Option 2

Calculate actions required to reach a desired margin %

if your margin % is %

Calculate

Change in portfolio value SGD
Financing available up to SGD

You can top up cash SGD
or
Top up shares worth SGD
or
Sell shares worth SGD

The actual loan amount, share value to buy, sell or top up and cash amount to top up may in some cases be less favourable than calculated.
Please check with your trading representative for a precise estimate.

Loans are subject to approval by OCBC Securities Ptd Ltd.

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TOOLS | Share Financing Calculator



4 Enter desired figures in **Option 2** to calculate actions to reach a desired margin percentage, and click on **Calculate**.

Option 2 (highlighted with a red circle and the number 4)

Calculate actions required to reach a desired margin %

if your margin % is %

Calculate

Change in portfolio value	1,332.91	SGD
Financing available up to		SGD
You can top up cash or	740.51	SGD
Top up shares worth or	1,332.91	SGD
Sell shares worth	1,666.14	SGD

The actual loan amount, share value to buy, sell or top up and cash amount to top up may in some cases be less favourable than calculated. Please check with your trading representative for a precise estimate.

Loans are subject to approval by OCBC Securities Ptd Ltd.

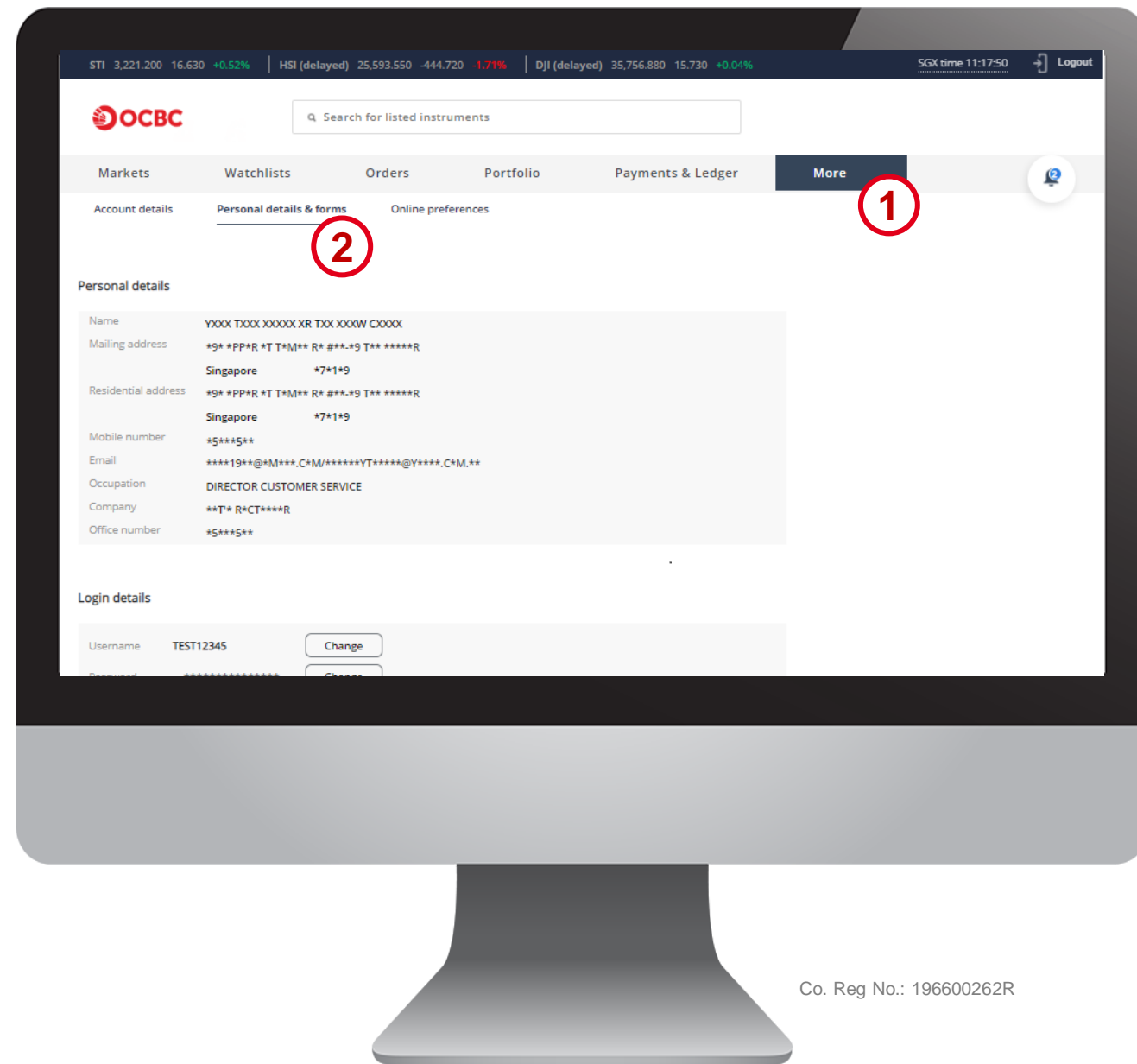
[Important Notes and Disclaimer](#)

SETTINGS | Personal details & forms



1 Select **More**

2 Click on **Personal details & forms**



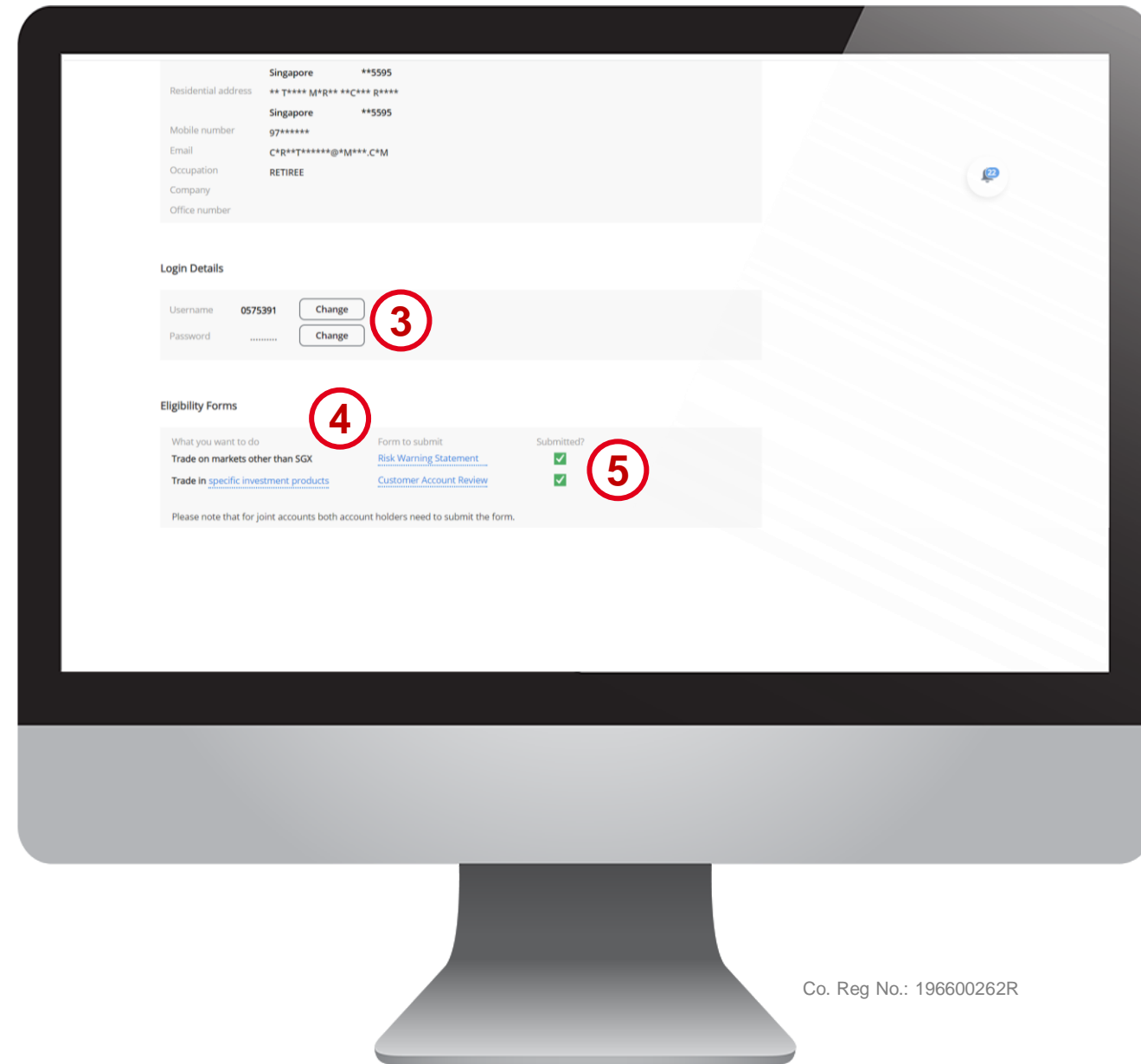
SETTINGS | Personal details & forms



3 Click on **Change** to change Username and Password

4 View and complete the necessary trading forms if you would like to trade on specific markets or instruments here

5 Your eligibility is displayed here



SETTINGS | Online preferences

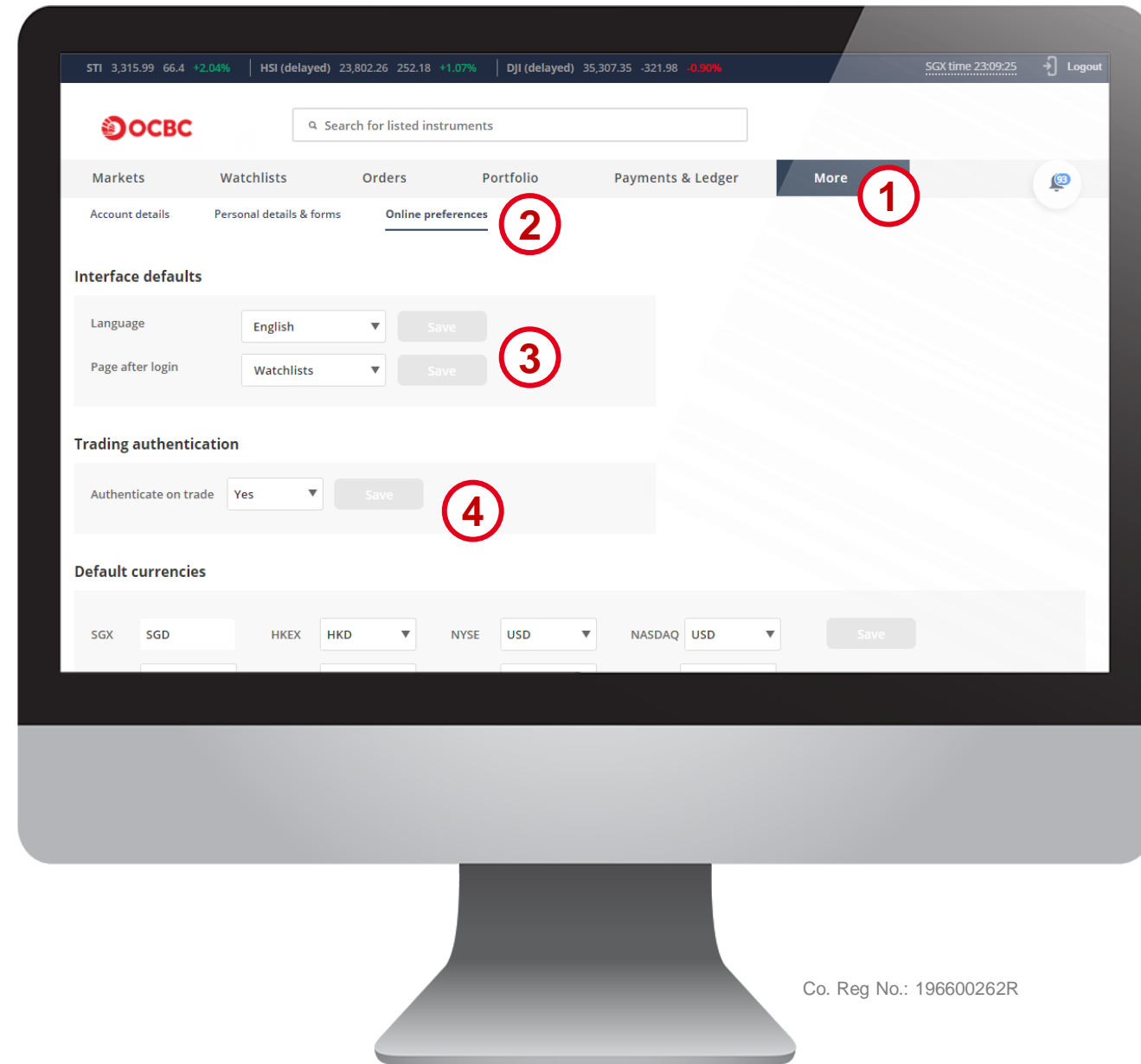


1 Select **More**

2 Click on **Online preferences**

3 You may select your Default language (English or Simplified Chinese), Default page after login, or Default settlement currency for each market

4 You may choose to enable/disable Trading authentication for password requirement when submitting trades



ALERTS | Setting stock alerts/enabling alerts¹

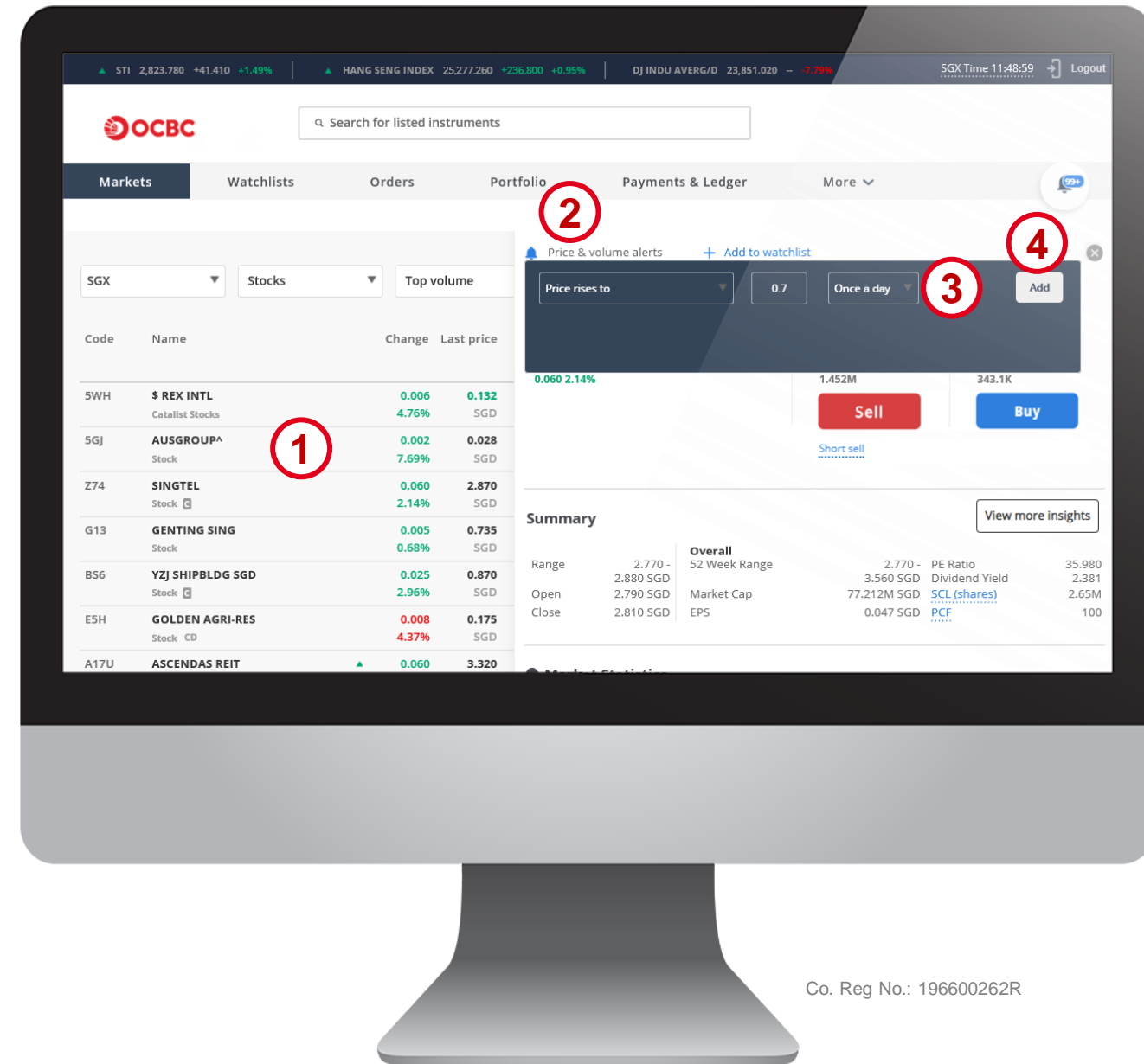


1 Select a counter

2 Click on the **Price & volume alerts** button to set an alert

3 Select the necessary alert conditions

4 Click on **Add** to confirm



Note:

¹ If you have not enabled alerts before, you will need to set a stock alert in order to enable the function.

Co. Reg No.: 196600262R

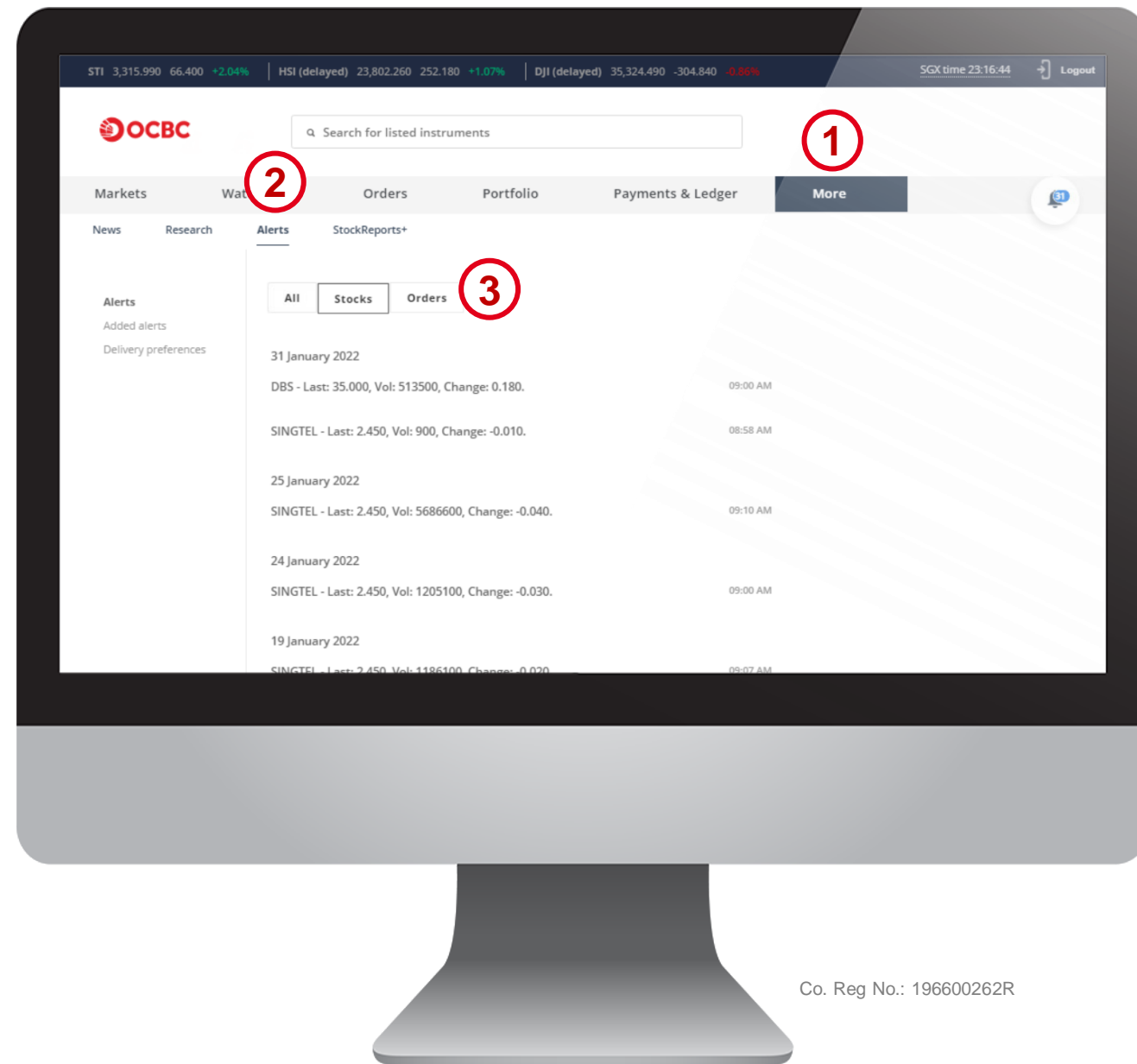
ALERTS | Viewing, editing and deleting stock alerts



1 Select **More**

2 Click on **Alerts**

3 Filter by **Stocks** to view your stock alerts



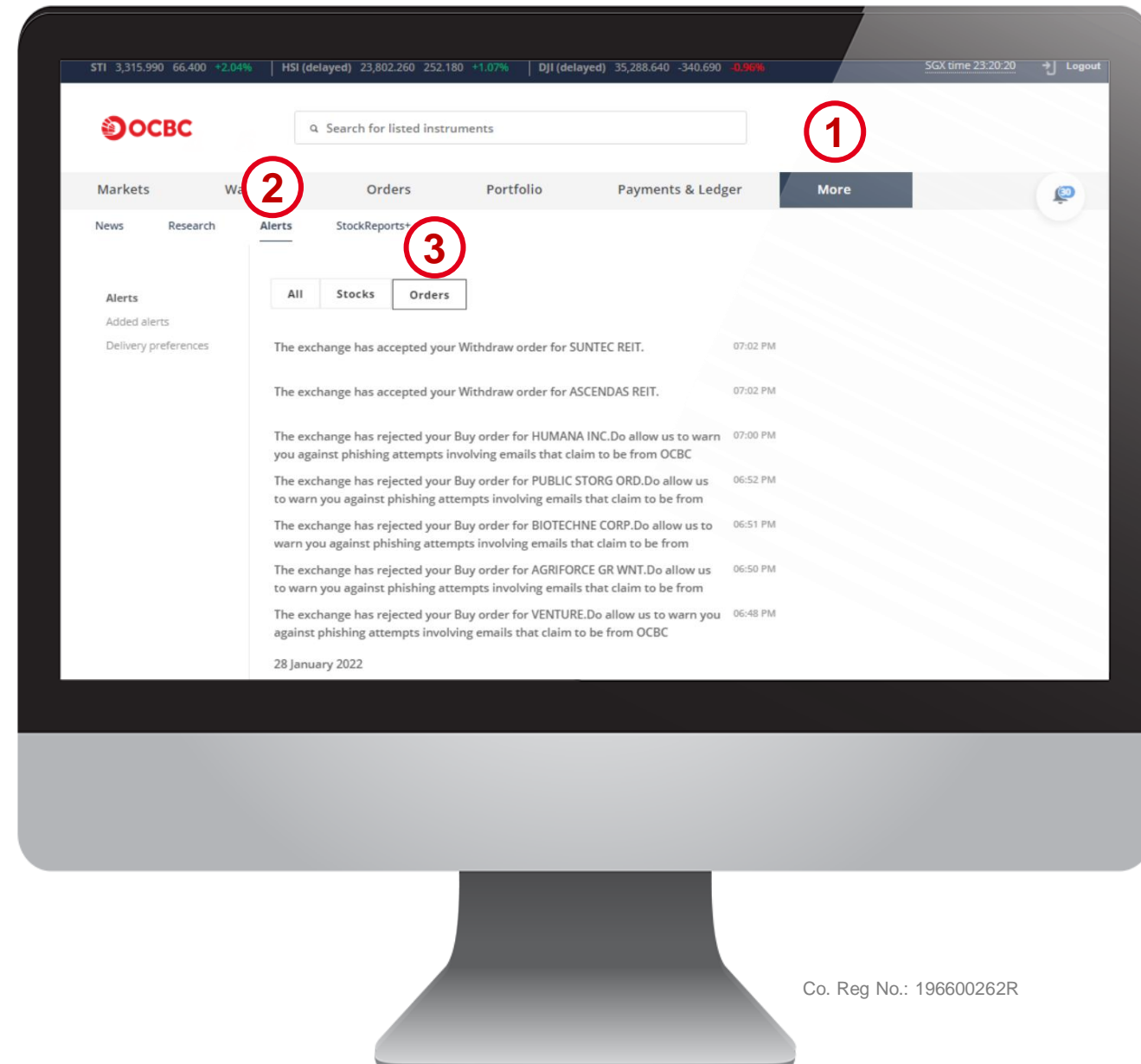
ALERTS | Viewing, editing and deleting stock alerts



1 Select **More**

2 Click on **Alerts**

3 Filter by **Orders** to view your trade flow alerts



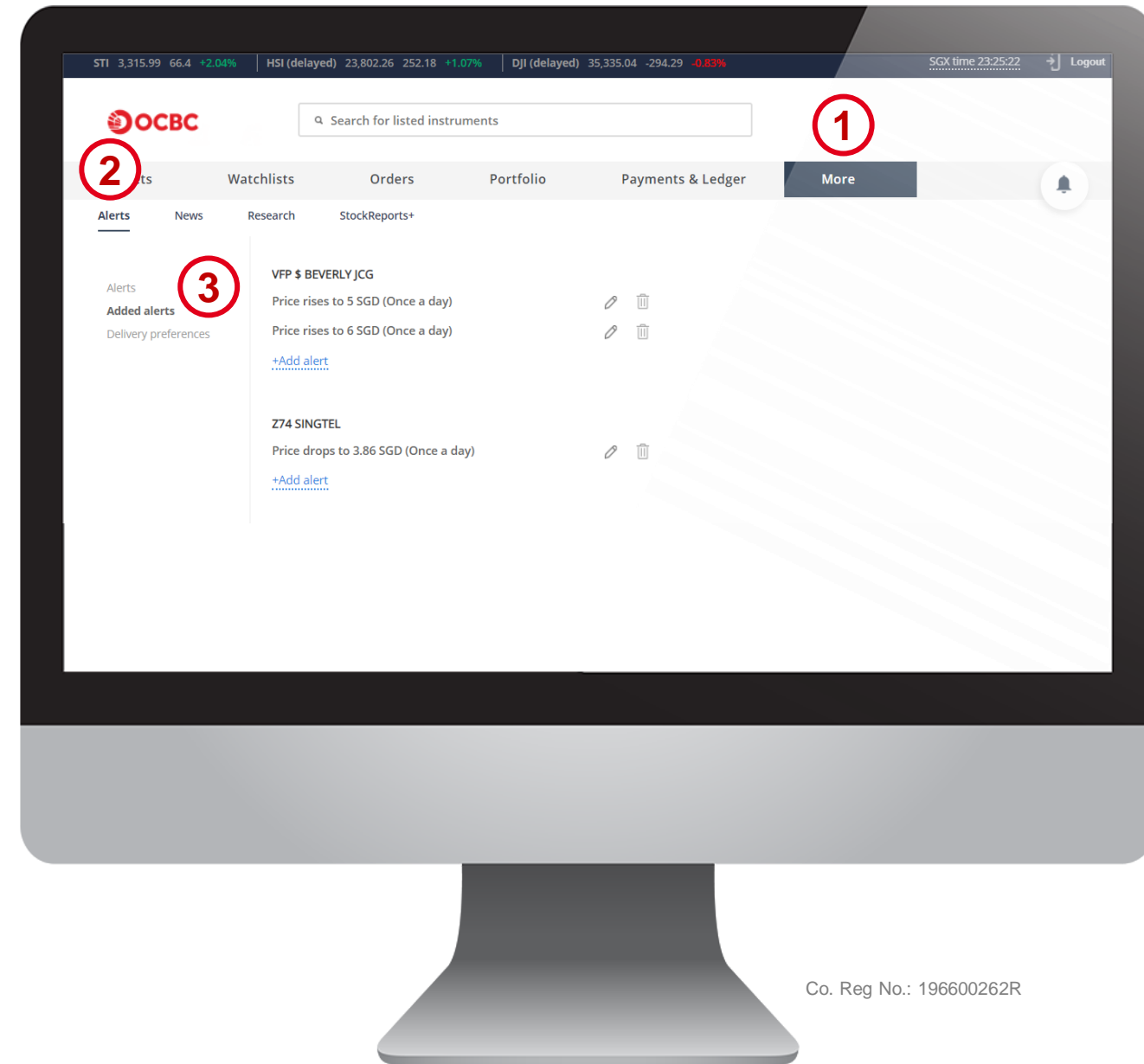
ALERTS | Viewing, editing and deleting stock alerts



1 Select **More**

2 Click on **Alerts**

3 Select **Added alerts** to edit or delete your alerts set by counter



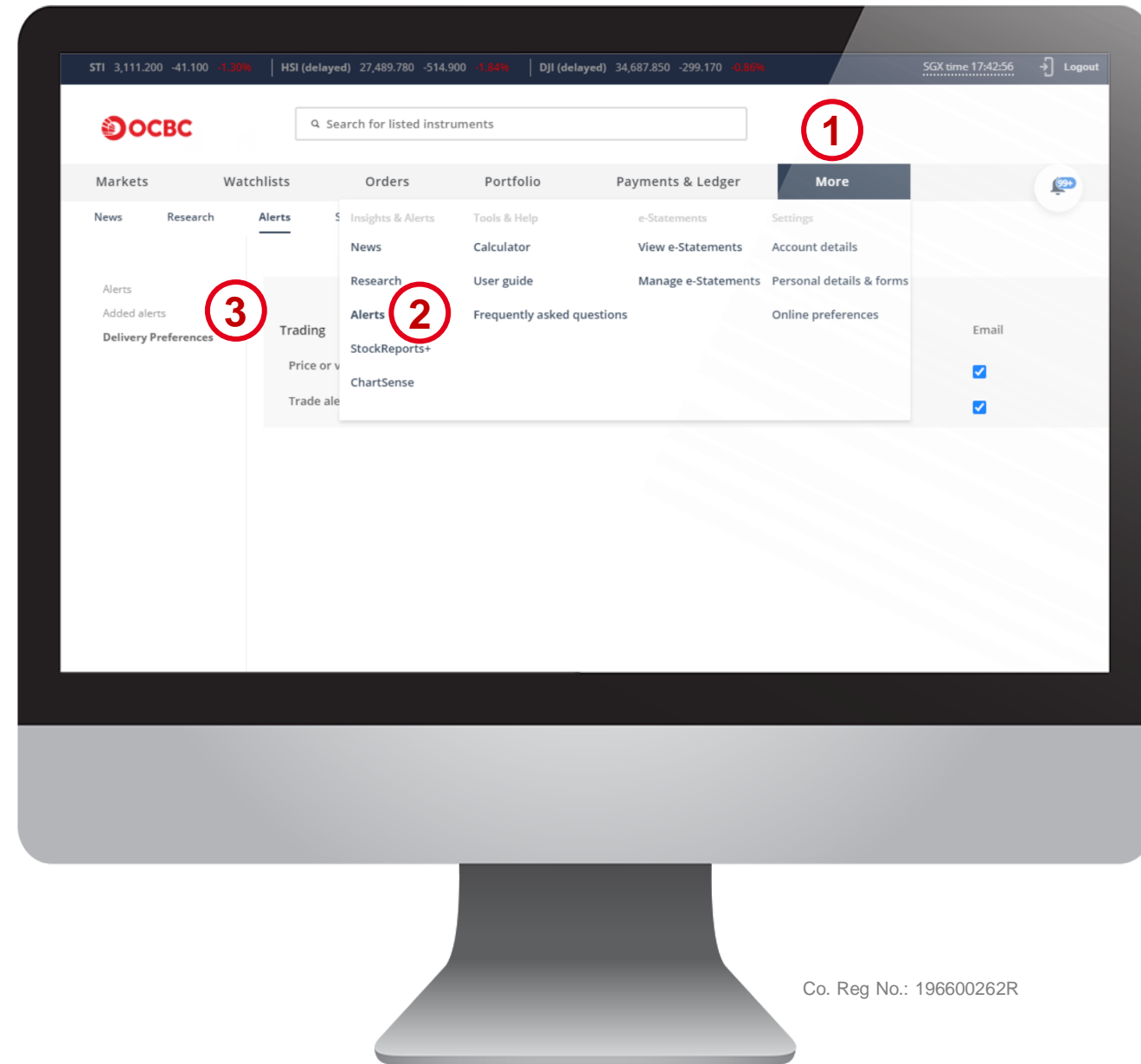
ALERTS | Editing delivery preferences



1 Select **More**

2 Click on **Alerts**

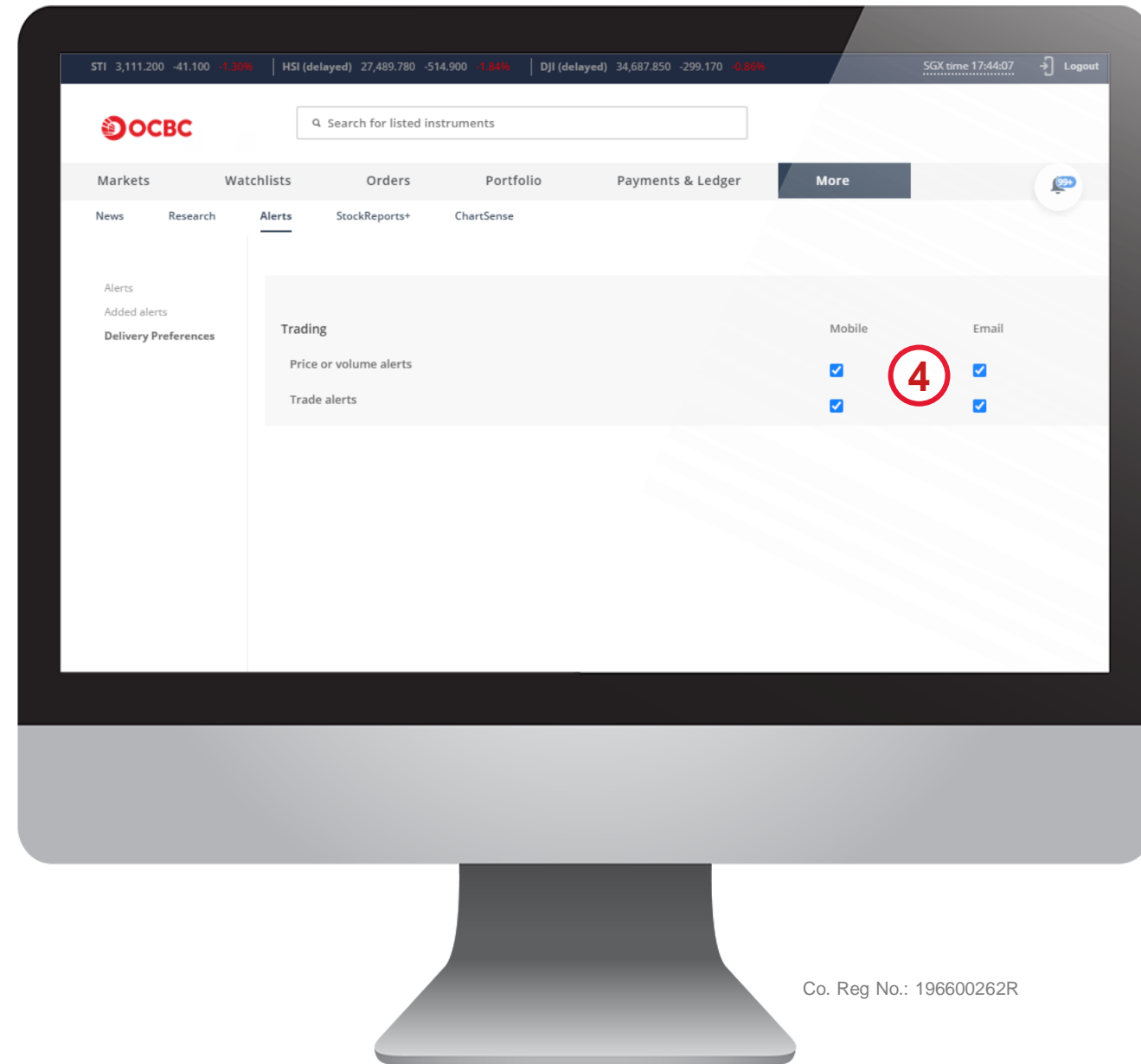
3 Select **Delivery Preferences**



ALERTS | Editing delivery preferences



4 Select or Unselect the checkbox to receive alerts from the chosen channels



NEWS | Read news

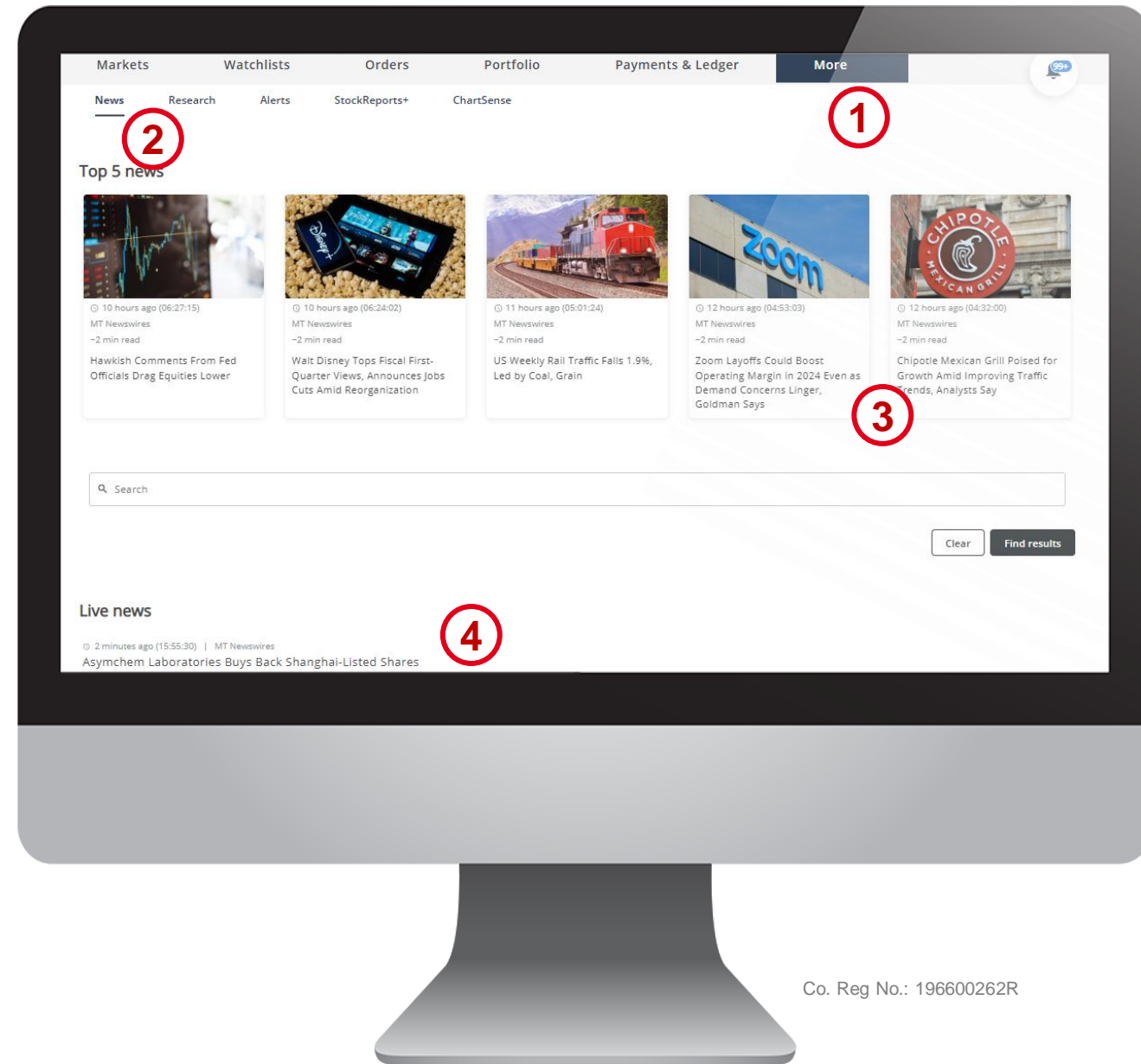


1 Select [More](#)

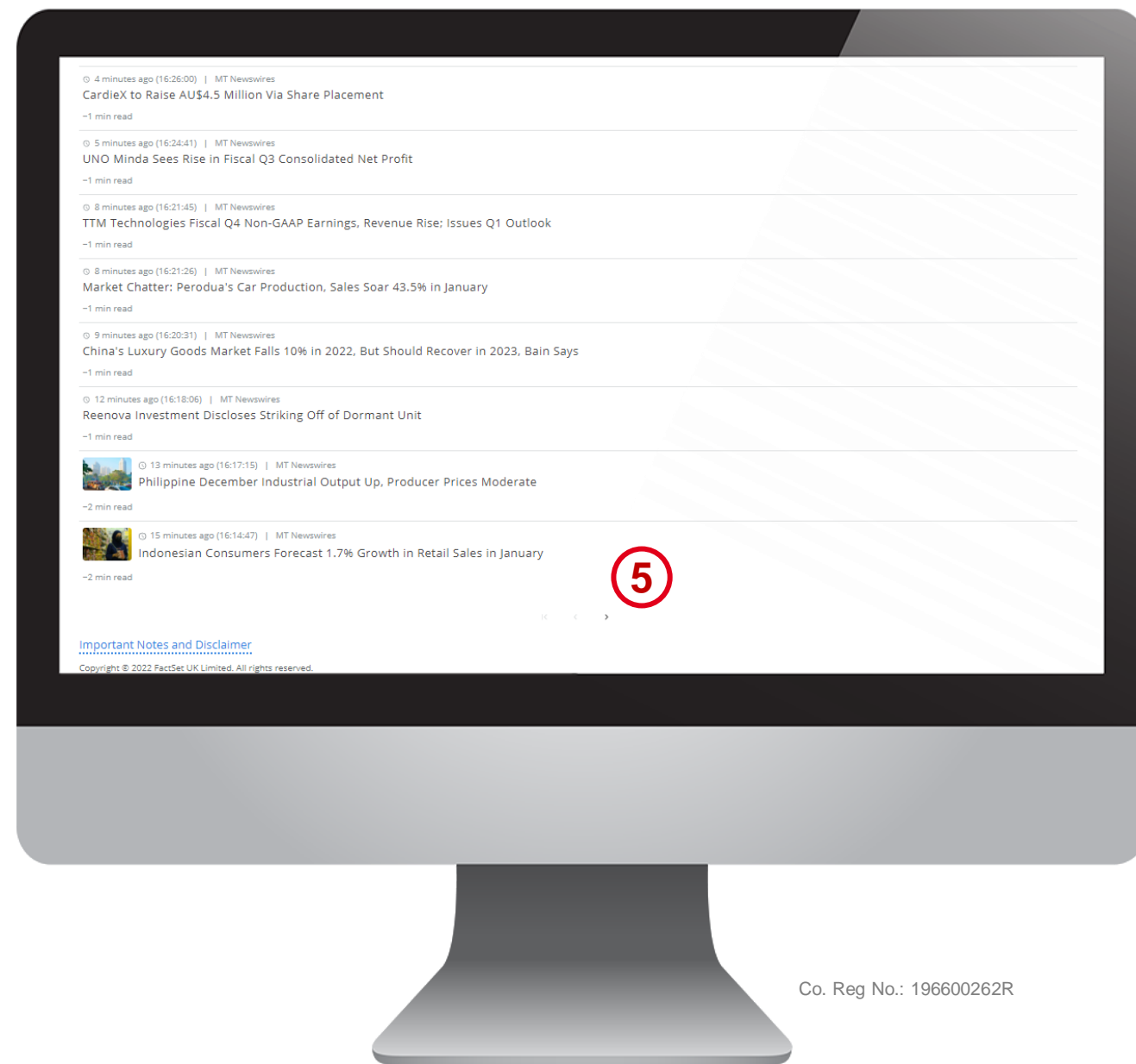
2 Click on [News](#)

3 Select any article in the Top 5 news to read top news

4 Click on any article under Live news to read latest news



5 Click the arrows to view next page of live news



NEWS | Search news

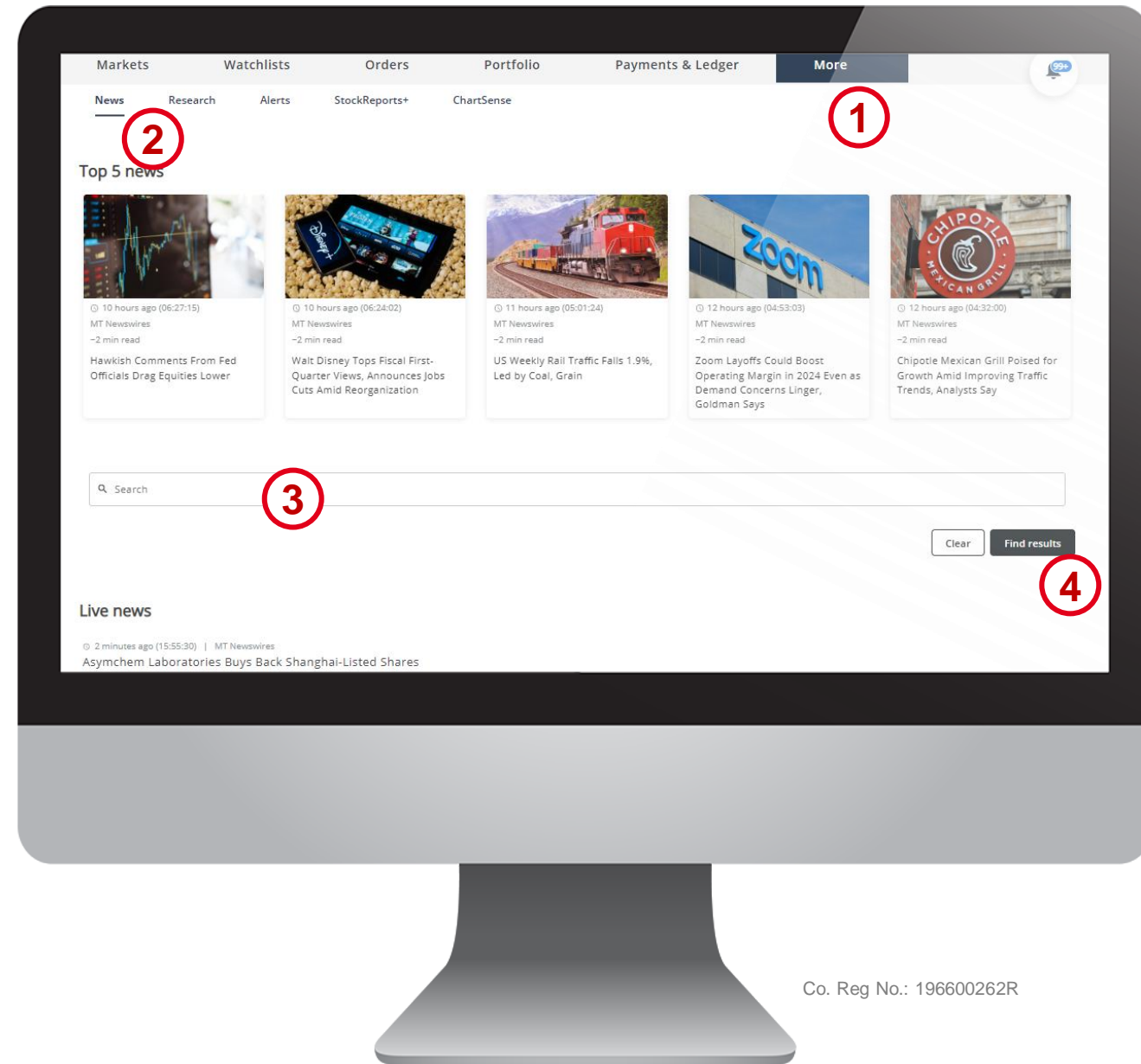


1 Select **More**

2 Click on **News**

3 Enter any keyword in search bar

4 Click on **Find results** to view related news



E-STATEMENTS | View e-Statements

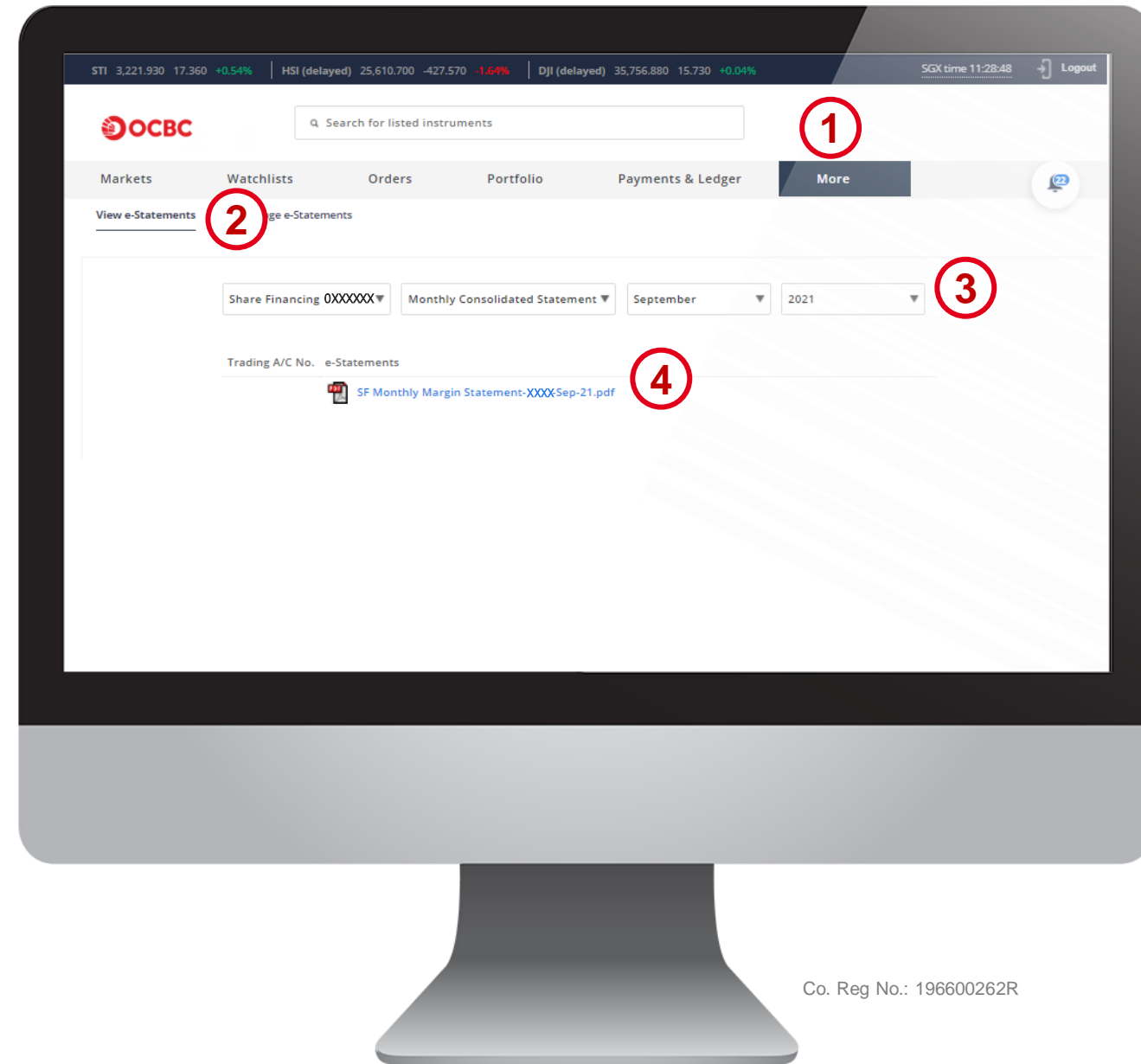


1 Select **More**

2 Click on **View e-Statements**

3 Use the filters to select the specific e-Statement you would like to view and download

4 Click on the list of e-Statement listed below to download the statement



E-STATEMENTS | Manage e-Statements



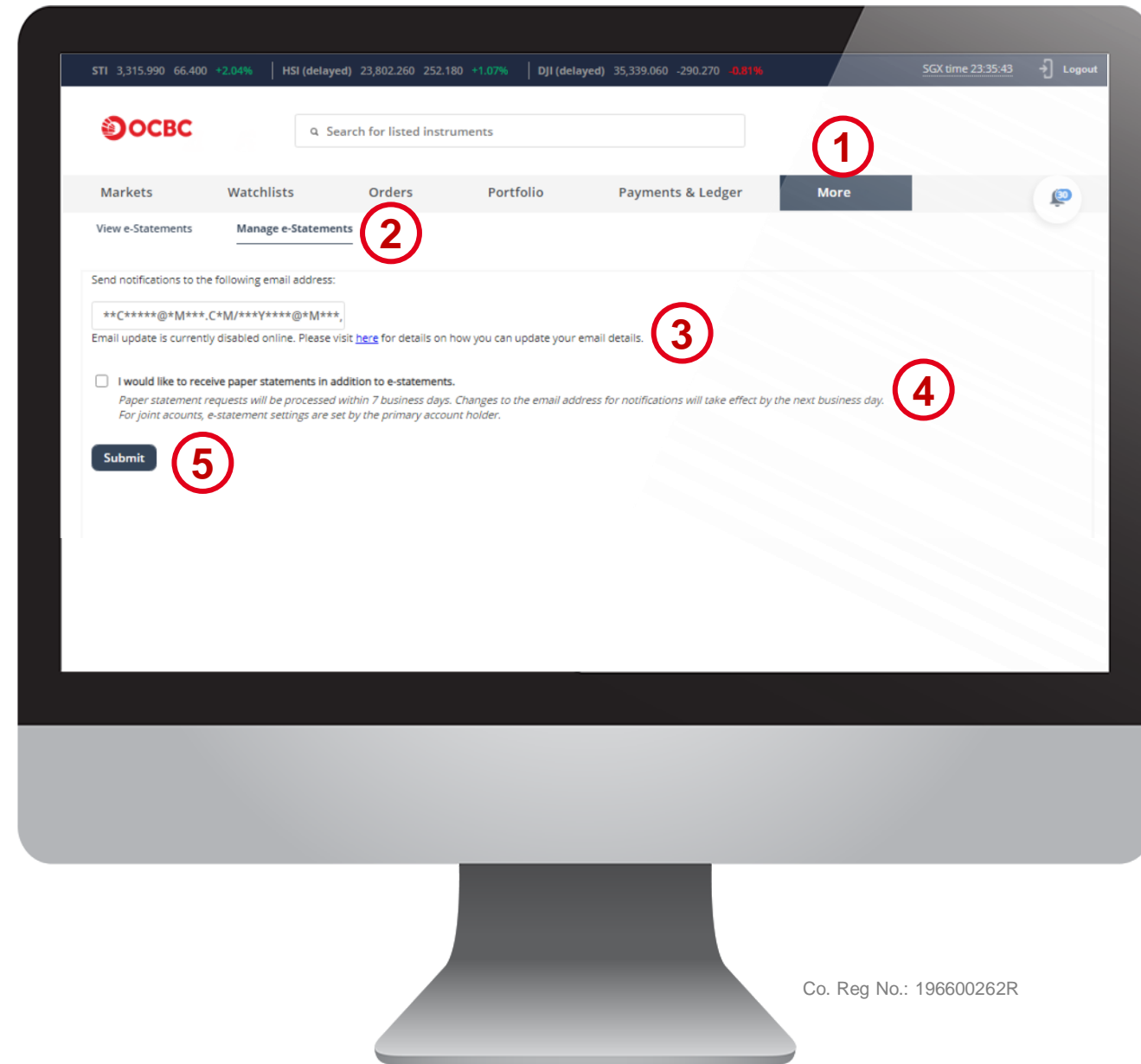
1 Select **More**

2 Click on **Manage e-Statements**

3 Email update is currently disabled online.
You may visit
<https://portal.iocbc.com/help-and-support/managing-your-account-update-account-details> for details on how you can update your email address.

4 Click the checkbox to receive paper statements in addition to e-statements and press Submit to confirm

5 Click **Submit**

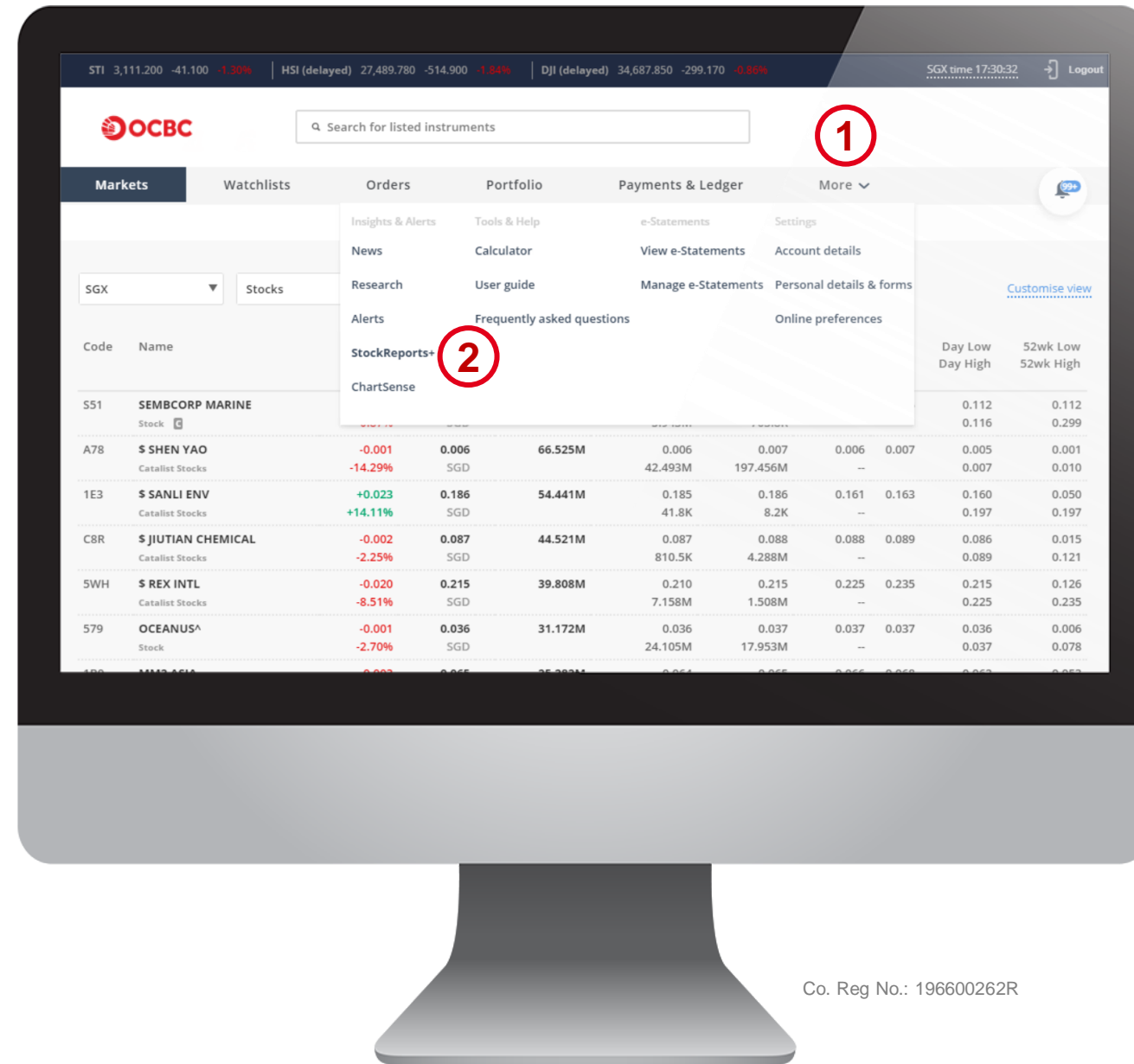


1 Select **More**

2 Click on **StockReports+**. StockReports+ will launch in a new window.

StockReports+ is a trading support tool that simplifies the process of evaluating stocks, providing users easy to understand stock ratings through earnings, fundamentals, relative valuation, risk and price momentum. StockReports+ is available for stocks trading in the Singapore, Malaysia, Hong Kong and United States markets.

You will need an iMatrix subscription in order to view StockReports+. Please contact your TR or Customer Service for more information.

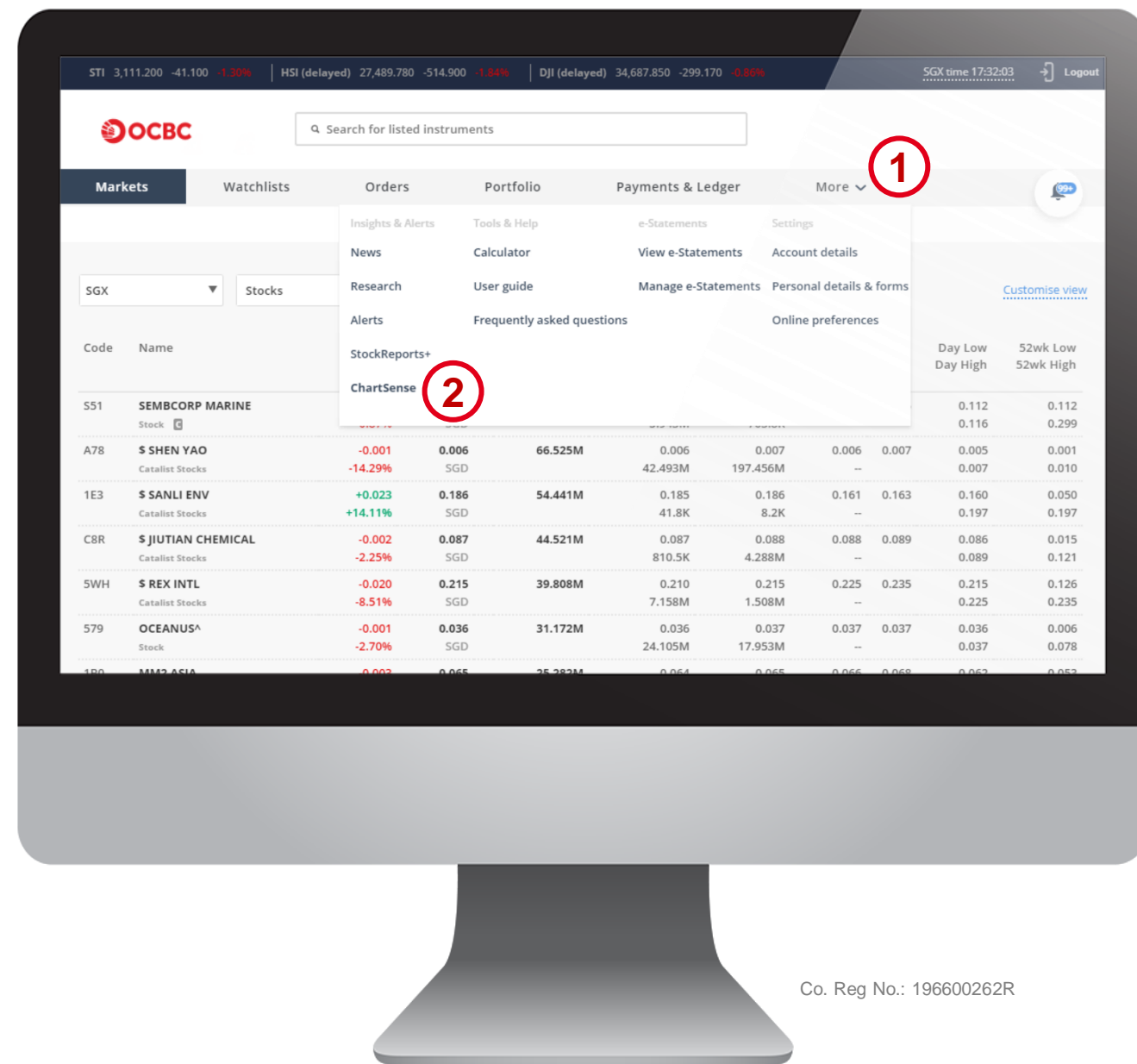


1 Select **More**

2 Click on **ChartSense**. ChartSense will launch in a new window.

ChartSense, powered by Recognia's proprietary algorithm, provides trading support tools to seasoned as well as novice investors and traders. ChartSense components provide a powerful blend of power and usability, allowing you to quickly find trade ideas, to validate recent trade opportunities, and enable automatic stock monitoring.

You will need an ChartSense subscription in order to view ChartSense. Please contact your TR or Customer Service for more information.



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