# **UOBKayHian**

### **ONLINE TRADING USER GUIDE**

## **UOBKayHian**

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#### 1 INTRODUCTION

Thank you for choosing UOB Kay Hian online trading system, which offers you a hassle-free online trading experience with its reliable features and tools to assist you in capitalising market opportunities around the world.

Giving you 24 hours access to SGX, Bursa Malaysia, HKEX, NASDAQ, NYSE and AMEX from the comfort of your home or overseas, you can also access our extensive research publications at your fingertips.

Before attempting to login to the online trading system, please take note of the following:

#### 1.1 System Requirements

The minimum recommended system requirements for trading with us online are:

- A Pentium III 500 MHz or above
- SGVA monitor configured to 1024 \* 768 resolutions with 256 colors or more
- 512 MB of RAM or above
- 56 kbps modem or more
- Windows 98/ME/NT/2000/XP
- Internet Explorer 5.5 or above with JavaScript enabled
- Mozilla Firefox 1.0 or above (for Mac users)

The following software should be installed: -

- An Internet browser capable of supporting Java<sup>TM</sup> and Javascripts<sup>TM</sup> (Microsoft Internet Explorer© 5.5 and above)
- Adobe Acrobat Reader©

As content on our website and system is constantly updated, we recommend that you adjust your browser cache settings to check for newer versions of stored pages upon every visit to a page.

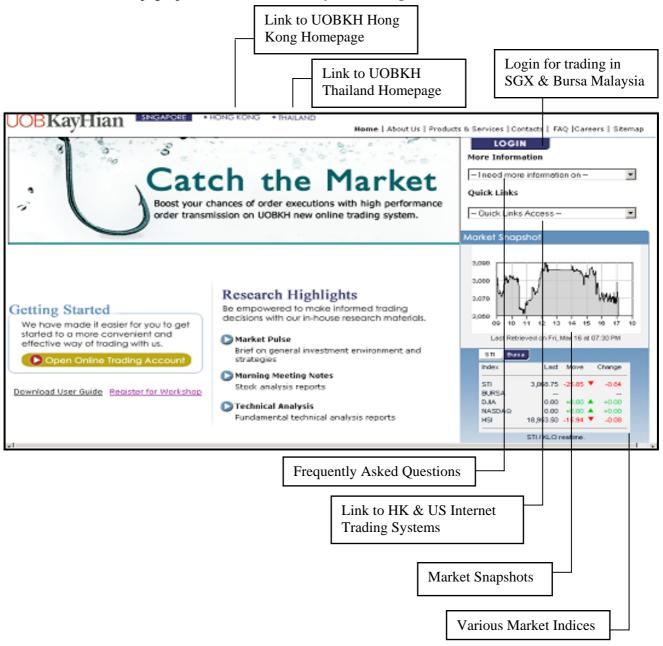
#### 1.2 Customer Service

For enquiries and online trading assistance, please contact our Client Services at (65) 6536 9338 or email us at cs@uobkayhian.com.



#### 2 OUR HOMEPAGE

To access our homepage, please enter www.uobkayhian.com.sg as the URL address.





#### 3 LOGIN

To log into UOBKH Internet Trading System, click on the login button on the top right hand corner of our homepage.



You will be directed to the login page as shown below. You will also be able to select the post-login start page.

For security purposes, you will be prompted to change your password upon your first login.



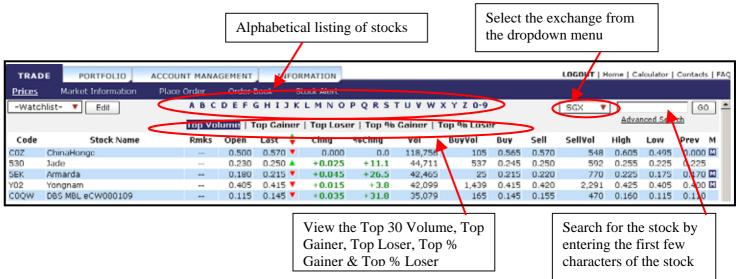
The password is **case** sensitive. It must be alphanumeric and between 6 to 12 characters.



#### 4 VIEW PRICES

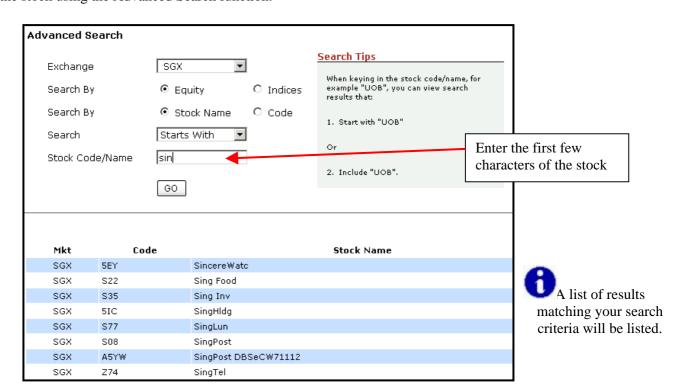
Depending on the price mode setting, you will have access to streaming or snapshot price movements to multiple markets.

#### 4.1 Obtain Stock Data



#### 4.2 Advanced Search

To search for the stock using the Advanced Search function.





#### 5 WATCHLIST

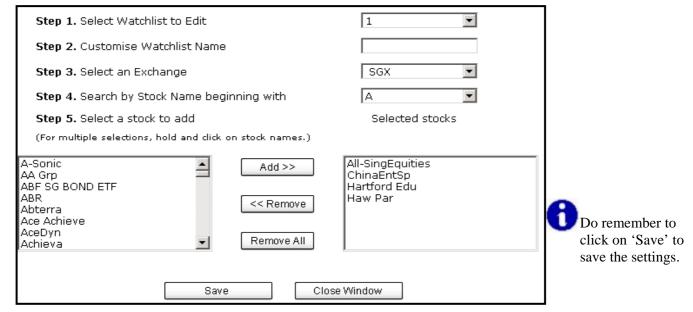
Our Watchlist function on the 'Prices' page provides a quick retrieval on quotes for your favourite stocks. Bringing you more flexibility, you can now add local and foreign stocks within the same Watchlist.

You can create up to 5 Watchlists (maximum 30 stocks on each watchlist).



#### 5.1 Edit Watchlist

To edit your watchlist, click on "Edit" beside the Watchlist dropdown menu. From the "Edit Watchlist" Page below, you will be able to customise the watchlist name as well as add and delete stocks in the watchlist.



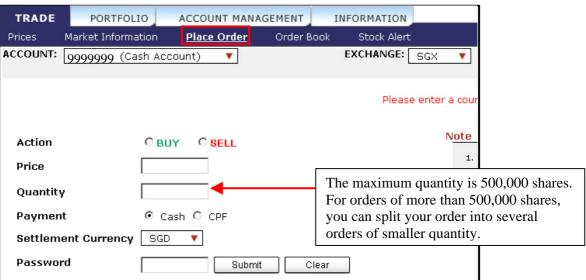


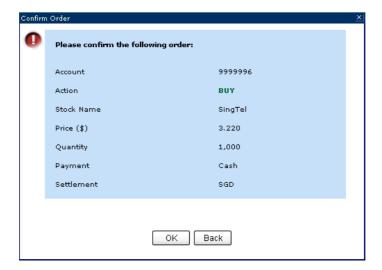
#### 6 TRADE

You may submit an order anytime of the day. Orders submitted during trading hours will be sent to the exchanges on queue for order execution. You may place overnight orders from 5.15pm onwards, and they will be sent to the exchanges the next trading day.

#### 6.1 Place Order

There are two ways you can place an order. You can either go to the 'Place Order' page under the Trade tab or click on the stock name.





Orders that are not done by end of the trading day will expire automatically. They will **NOT** be carried forward to the next trading day.

For Bursa Malaysia orders, there may be a slight delay in updating the order status. You may contact your Trading Representative to check your order status.



#### 7 ORDER BOOK

Keep track of your orders with our 'Order Book' page under the Trade tab. View your orders placed for the day, up to 3 days ago and also a history of all your trades done. You can also withdraw up to 10 orders simultaneously with our Quick Withdrawal function.

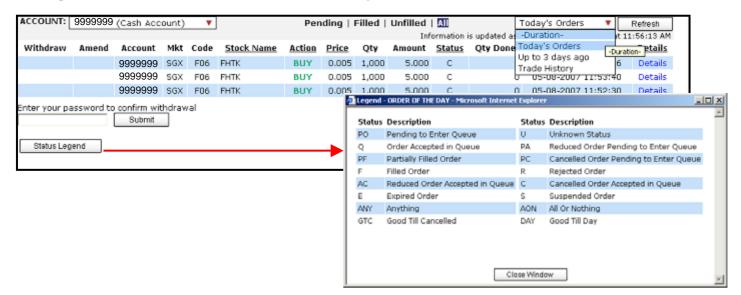


Please note that partially filled orders will be displayed under 'Filled' during trading hours. After partially filled orders are amended or cancelled, they will be filtered to 'Pending' and 'Unfilled' respectively.

After trading hours, all partially filled orders, whether cancelled or expired, will appear under 'Unfilled'. Nonetheless, all orders will appear under 'All'.

#### 7.1 Check Order Status

The descriptions for the status field can be found in "Status Legend".



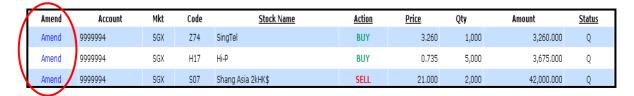


You can click on 'Details' to view additional details of each order.

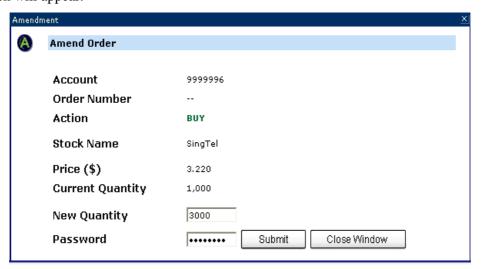


#### 7.2 Amend Orders

Click on "Amend".



The amendment screen will appear.



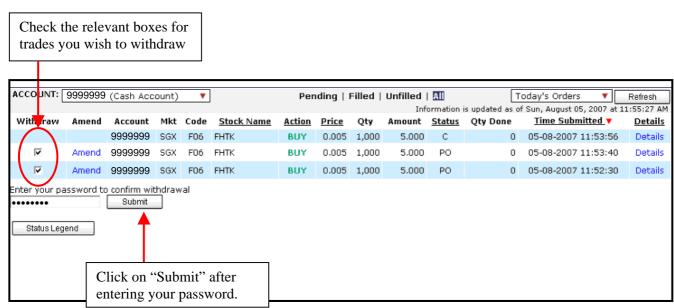
SGX/Bursa Msia: Only the number of shares can be amended downwards.

HKEX: Prices can be amended upwards or downwards. Quantity can only be amended downwards.

NASDAQ/NYSE/AMEX: Amendments are not available.



#### 7.3 Withdraw Orders



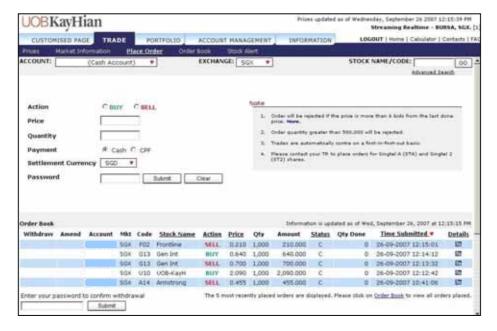
For your convenience, you can withdraw up to 10 orders at a time.

A withdrawal request does not mean the order has been successfully withdrawn. Please check the Order Book for confirmation.

Please note that order amendments and withdrawals can only be done for shares that have not yet been filled. If the order was partially filled, only the unfilled quantity can be amended or withdrawn.

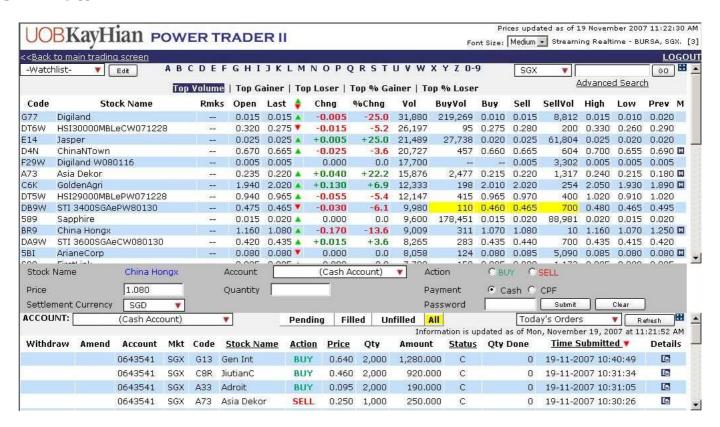
#### 7.4 Most Recent Orders Displayed in Place Order Page

Apart from the 'Order Book' page, you are also able to view the 5 most recent orders of the day in your 'Place Order' page under the Trade tab.





#### **8** POWER TRADER II



The Power Trader II feature allows you to access the three most frequently utilised functions within one screen:

- 1. Prices
- 2. Place Order
- Order Book

To place an order, simply double-click on the stock, fill in/edit your order details and password before submitting your order.

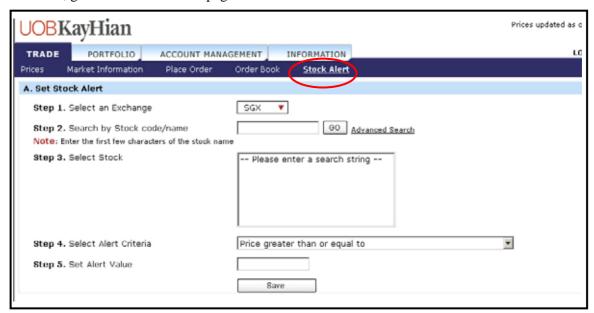
To access this feature, click on Power Trader II under the Trade tab.



#### 9 STOCK ALERT

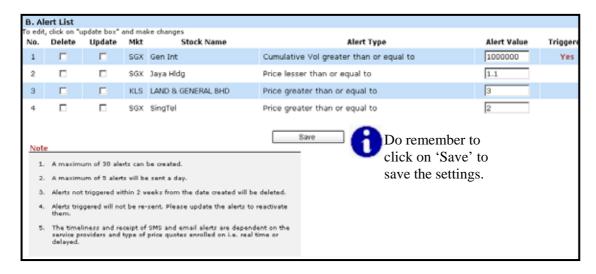
#### 9.1 Add Stock Alert

To create a stock alert, go to the 'Stock Alert' page under the Trade tab.



#### 9.2 Edit/Delete Stock Alert

The 'Alert List' shows stock alerts that you have created and allows you to edit and delete the stock alerts.



Stock alerts that have been triggered will not be re-sent. Please update the alert to reactivate it.



#### 10 PORTFOLIO MANAGEMENT

Portfolio Management allows you to keep track of your stock holdings, giving you up-to-date information and valuation of your investments.

#### 10.1 Unrealised Profit/Loss

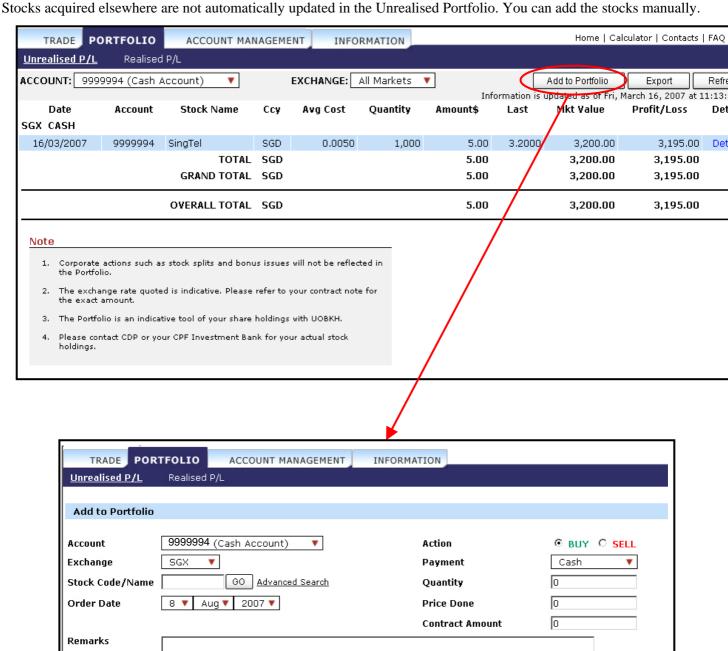
Online and offline contracts traded through UOBKH will be updated into your Unrealised P/L automatically the next trading day. These positions are marked to the last done value of the current trading day.

Home | Calculator | Contacts | FAQ TRADE PORTFOLIO ACCOUNT MANAGEMENT INFORMATION Unrealised P/L Realised P/L ACCOUNT: 9999994 (Cash Account) **EXCHANGE:** All Markets Add to Portfolio Export Refre Information is updated as of Fri, March 16, 2007 at 11:13: Date Account Stock Name Avg Cost Quantity Amount\$ Last Mkt Value Profit/Loss SGX CASH 16/03/2007 9999994 SingTel SGD 0.0050 1,000 5.00 3.2000 3,200.00 3,195.00 Det TOTAL SGD 5.00 3,200.00 3,195.00 GRAND TOTAL SGD 5.00 3,200.00 3,195.00 OVERALL TOTAL SGD 5.00 3,200.00 3,195.00 Note Corporate actions such as stock splits and bonus issues will not be reflected in the Portfolio. The exchange rate quoted is indicative. Please refer to your contract note for The Portfolio is an indicative tool of your share holdings with UOBKH. Please contact CDP or your CPF Investment Bank for your actual stock holdings.

Export your unrealised P/L in Excel format



#### 10.2 **Add Entry to Portfolio**



Clear

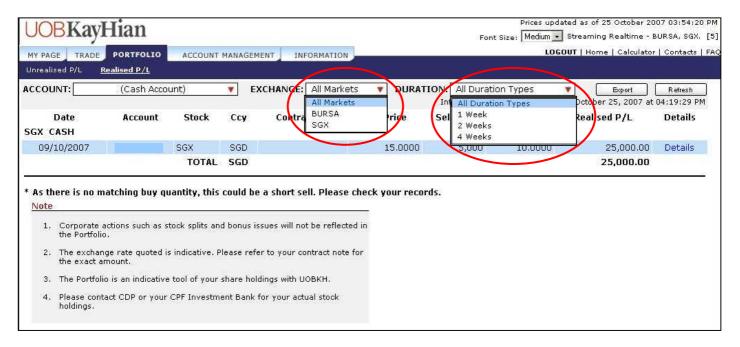
Add



#### 10.3 Realised Profit/Loss

The Realised P/L shows a record of the shares that you have bought and sold so you may keep track of your actual profit/loss minus brokerage charges. It computes your actual profit/loss for buying and selling that particular stock.

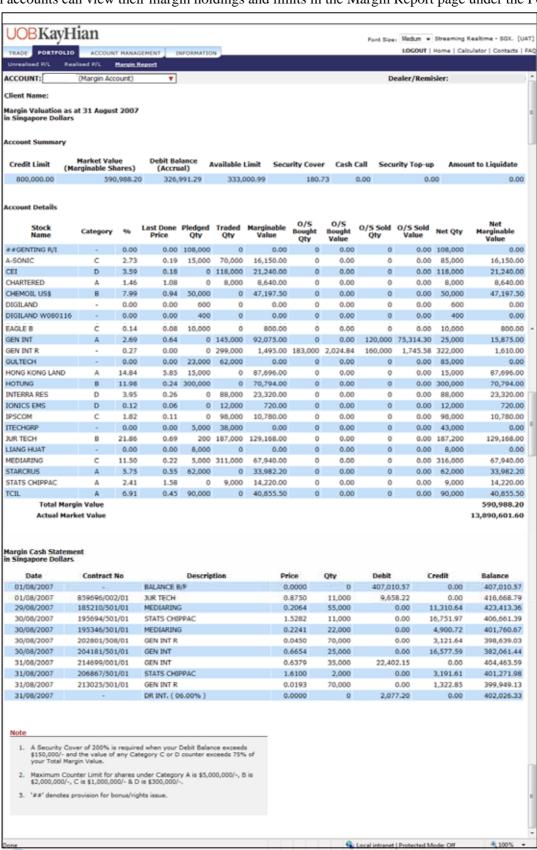
You can filter your Realised P/L entries according to the exchange or duration.





#### 11 MARGIN REPORT

Clients with margin accounts can view their margin holdings and limits in the Margin Report page under the Portfolio tab.





#### 12 ACCOUNT MANAGEMENT

Account Management allows you to manage various aspects of your UOB Kay Hian online trading account.

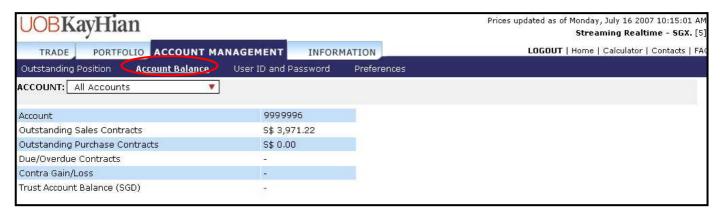
#### 12.1 Outstanding Position

A list of all outstanding contracts and contra pending payment will be displayed sorted by date.



#### 12.2 Account Balance

Account Balance provides a summary of all your open and closed outstanding positions in monetary terms.





#### 13 CHANGE USER ID & PASSWORD

You will be able to change your user ID and password for logging in under 'User ID and Password'.

Change User ID	
<ol> <li>Enter New User ID</li> <li>Re-enter New User ID</li> <li>Enter Password</li> </ol>	Save
Change Password	
<ol> <li>Enter Current Password</li> <li>Enter New Password</li> <li>Re-enter New Password</li> </ol>	Save

It is advisable that you change your password periodically. The password must be alphanumeric and between 6 and 12 characters. Do note that it is case sensitive. For security reasons, you will be prompted to change your password every 300 days.

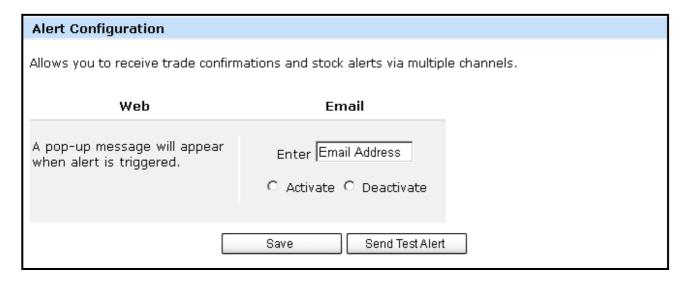


#### 14 PREFERENCES

To enhance your online trading experience, you can define your preferences for alert configurations, type of price mode and default trading account.

#### 14.1 Alert Configuration

You can view the type of alerts you are entitled to and configure the alerts.



#### 14.2 Set Price Mode

The price mode will determine whether data are on a 'push' or 'pull' basis. The streaming mode 'pushes' prices to you automatically. The snapshot mode uses a 'pull' technology where prices are updated when you can click the 'Refresh' button.

Clients who may have difficulty accessing streaming prices due to network issues are advised to select the snapshot mode.

Set Price Mode	
Allows you to set the price mode for viewing data updates.	
C Streaming Mode C Snapshot Mode	
Save	



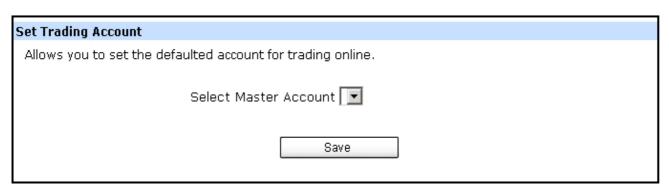
#### 14.3 Set Font Size

Clients may select their preferred font size as the default font size upon every login.

Set Font Size		
Allows you to set the font size.		
	C SMALL	€ MEDIUM € LARGE
		Save

#### 14.4 Set Trading Account

For clients with multiple trading accounts, you can select your preferred account as the default account for trading online.

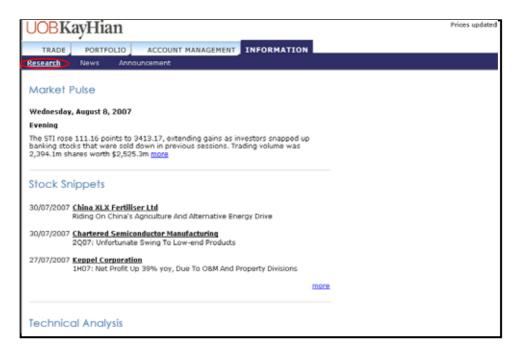




#### 15 INFORMATION

#### 15.1 Research

Research materials by UOBKH's Research Team are made available for clients to help you make informed trading



#### 15.2 News

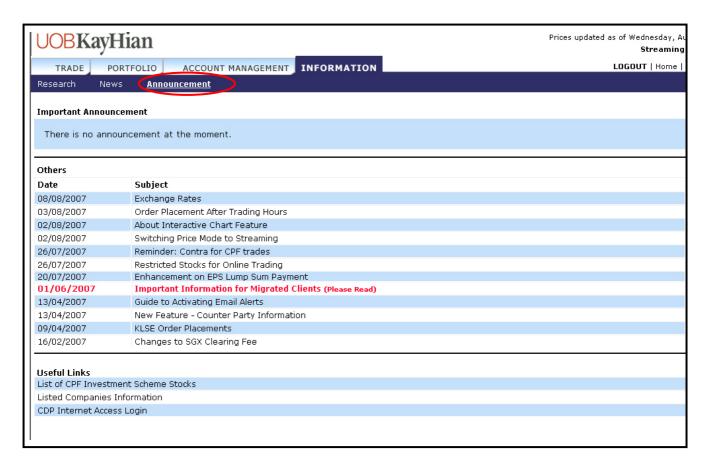
To keep you updated on what is happening in the markets, news updates from Reuters are made available at your fingertips.





#### 15.3 Announcement

Clients are strongly encouraged to check for announcements upon every login.

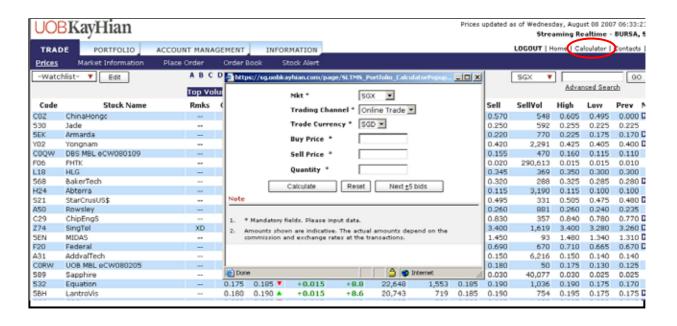




#### 16 CALCULATOR

The Calculator allows you to calculate the estimated brokerage charged and the profit/loss position from your share transactions (within next five bids).

The Calculator link is at the top-right corner of the trading page.





#### 17 USEFUL TIPS

Right click on a stock name anywhere in the trading page to access the quick menu:

- Buy
- Sell
- Intraday Chart
- Add to Watchlist
- Time & Sales
- Trade Summary
- Market Depth (on subscription basis)
- Interactive Chart (previously Historical Chart; for more information, visit <a href="http://www.chartnexus.com/support/appletmanual.php">http://www.chartnexus.com/support/appletmanual.php</a>)

