

# **BROKERAGE - ENHANCED TRADING PLATFORM USER**

# **GUIDE**

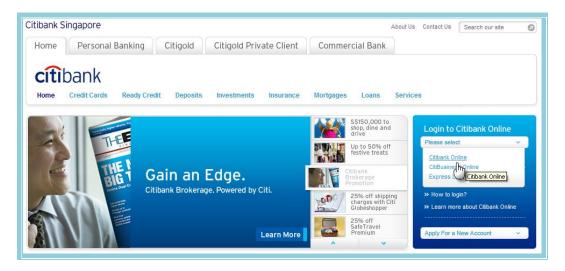
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## **Login to Your Account**

1. Login to your account at www.citibank.com.sg



2. Scroll over Investment and select Brokerage

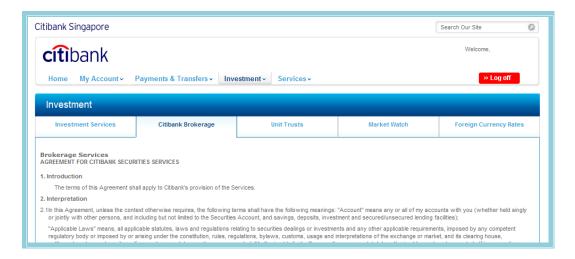


3. Key in One-Time PIN (OTP) when prompted



#### **Entering Brokerage Platform**

1. Read through Agreement for Citibank Securities Services



2. At the bottom on the page, click I Agree



3. Read through New York Stock Exchange and American Stock Exchange Agreement





#### 4. At the bottom on the page, click I Agree

11. PERSONAL AND EMPLOYMENT DATA - As a prerequisite to qualifying as a "Nonprofessional Subscriber", Subscriber shall provide the following information:
Subscriber's name and address:
Subscriber's occupations (list all occupations - including homemaker, student, retiree, etc.):
Name(s) and address(es) of Subscriber's employer(s):
Subscriber's title(s) and/or position(s):
Subscriber's employment functions (description):
Subscriber's employment functions (description):
Subscriber shall notify Vendor promptly in writing of any change in his or her circumstances that may cause him or her to cease to qualify as a Nonprofessional Subscriber.

12. CERTIFICATION - By clicking on the following box, Subscriber hereby certifies that he or she falls within Paragraph 9's definition of Nonprofessional Subscriber" and that the personal and employment information that he or she has included in Paragraph 11 is truthful and accurate.

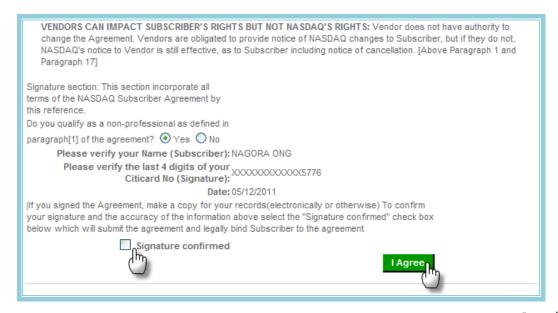
Citigroup.com

Security Lo

### Read through Nasdaq Stock Market Agreement



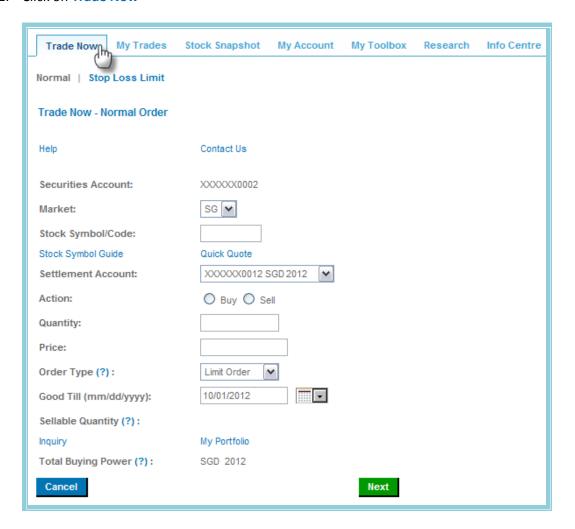
#### 6. At the bottom on the page, click I Agree





## **Placing Trades - Normal Trades**

1. Click on Trade Now

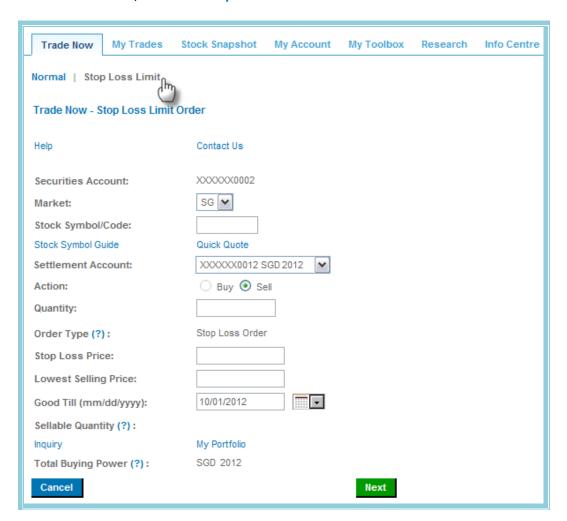


- 2. Enter your order details
- 3. Click Next
- Click Stock Symbol Guide to search for the stock symbol of the security you want to trade
- Click Quick Quote to view real-time stocks information



## **Placing Trades - Stop Loss Limit**

1. Click on Trade Now, and select Stop Loss Limit

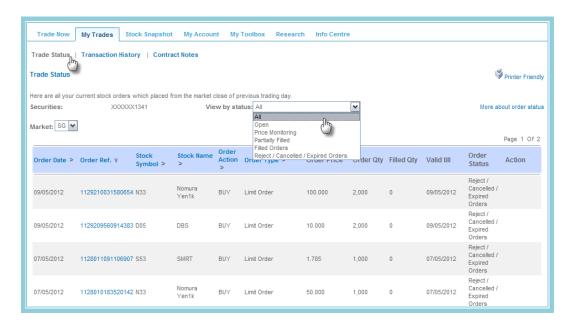


- 2. Enter your order details
- 3. Click Next
- Stop Loss Limit option is only valid for "Sell" trades
- Enter Lowest Selling Price that is lower than Stop Loss Price
- The Lowest Selling Price <u>cannot be lower</u> than SGD, USD or HKD 0.01 and 90% of Stop Loss Price



## **Tracking Trades - Trade Status**

1. Click on My Trades, and select Trade Status

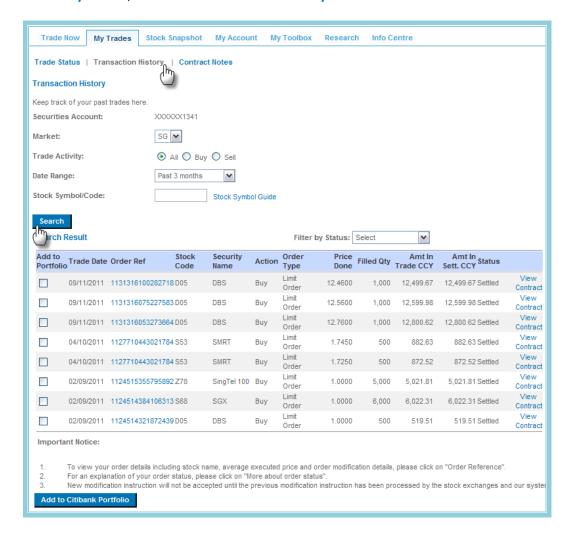


- 2. Under View by status, select a category
- Click on ^ or v to sort your orders by Order Reference Number
- Click on > or < to sort your orders by time and date
- Click on More about order status for description of the order status



### **Tracking Trades - Transaction History**

1. Under My Trades, and click on Transaction History

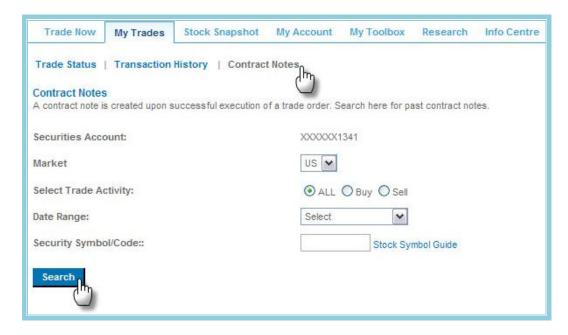


- 2. Select a Market
- 3. Choose a type of Trade Activity
- 4. Select the period of past trades to track under Date Range
- 5. Enter Stock Symbol or click on **Stock Symbol Guide** to find the security symbol
- 6. Click Search
- Check under Add to Portfolio and click Add to Citibank Portfolio to add your Singapore market trades to your Citibank stockholdings
- Click on Order Reference Number to view order details
- Click on View Contract to view the contract note of the order



## **Tracking Trades - Contract Notes**

1. Under My Trades, and click on Contract Notes

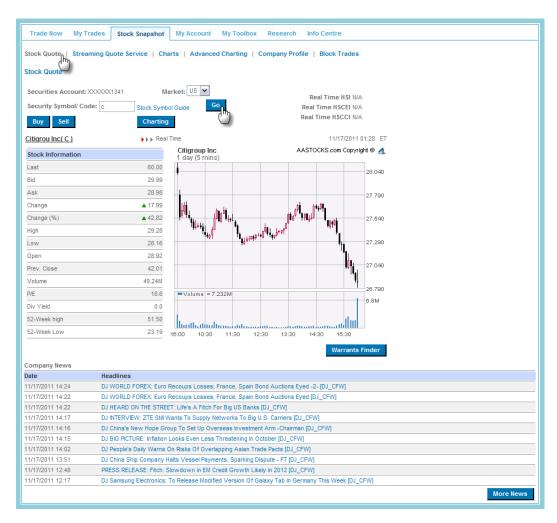


- 2. Select a Market
- 3. Choose a type of Trade Activity
- 4. Select the period of past trades to track under Date Range
- 5. Enter Stock Symbol or click on **Stock Symbol Guide** to find the security symbol
- 6. Click Search



### Finding Securities Information – Stock Quote

1. Under Stock Snapshot, click on Stock Quote



- 2. Enter the Stock Symbol or click on Stock Symbol Guide to find the symbol
- 3. Click Go. The stock information and company news will be displayed below
- Click on Charting to view Charts page and access other tools
- Click on Buy / Sell to proceed to Trade Now page to place your order
- Click on Warrants Finder to search for information on warrants
- Click on More News to access Research page for more news categories

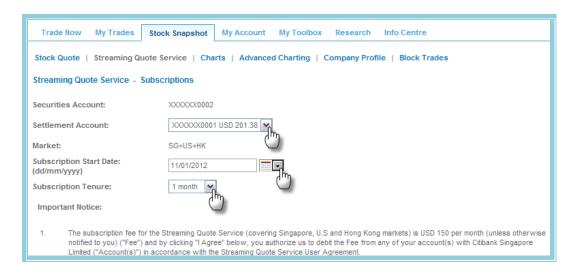


## Finding Securities Information – Streaming Quote Service

1. Under Stock Snapshot, click on Streaming Quote Service

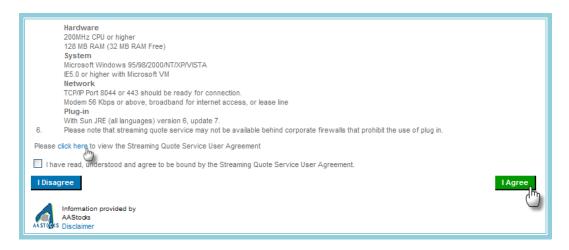


- 2. Select your Securities Account
- 3. Click Enroll for Streaming Quote Service
- 4. Select your Settlement Account, Subscription Start Date and Subscription Tenure





5. Click on Click here, carefully read through the agreement terms and conditions and tick the checkbox to indicate that you have read and accept the terms and conditions



- 6. Once done, tick the checkbox to indicate that you have read and accept the terms and conditions
- 7. Click on I Agree to proceed
- You will receive expiry email alerts when your subscription is ending
- You may experience difficulty viewing this from your office due to your office's firewall setup



### **Finding Securities Information - Charts**

1. Under Stock Snapshot, click on Charts

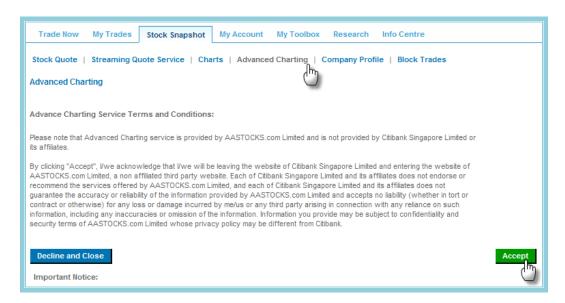


- 2. Select the Market
- 3. You can enter or search for Stock Symbol, or choose an Index
- 4. Select Chart Type and Time Span
- 5. Indicate if you want to compare charts
- 6. Choose up to 3 Technical Indicators for your chart option
- 7. Click Draw



### **Finding Securities Information - Advanced Charting**

1. Under Stock Snapshot, click on Advanced Charting



2. Read through the disclaimers and click on Accept

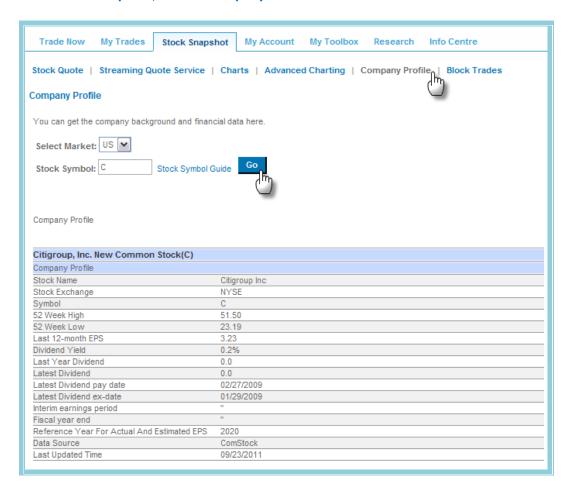


- This advance charting is a complimentary service, there is no charges
- When you click Accept, the advanced chart will appear in a third party pop-up
- The chart program is not compatible with MAC operating system
- The service provides live streaming of quotes for Hong Kong, Singapore and U.S. markets



## **Finding Securities Information - Company Profile**

1. Under Stock Snapshot, click on Company Profile

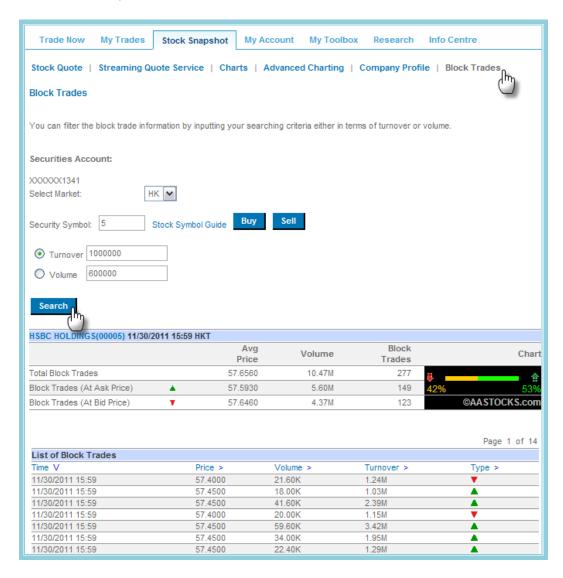


- 2. Click on Go to view company details
- You may experience intermittent delays in loading information of Singapore market securities



### **Finding Securities Information - Block Trades**

1. Under Stock Snapshot, click on Block Trades

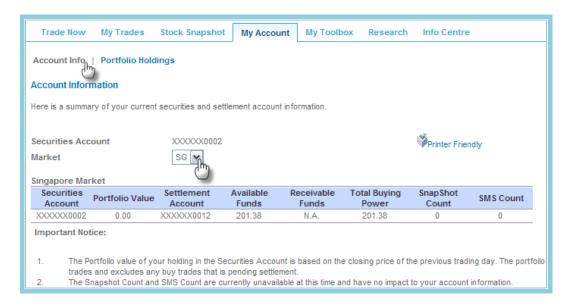


- 2. Select Market
- 3. Enter or search for security symbol
- 4. Indicate if you would like to search by Turnover or Volume
- 5. Click Search
- Click on ^ or v to sort your orders by Order Reference Number
- Click on > or < to sort your orders by time and date</li>
- Block Trades is only available for Singapore and Hong Kong markets
- Click on Buy / Sell to proceed to Trade Now page to place your order



### **Monitor Your Securities and Settlement Accounts - My Account**

1. Click on My Account, select Account Info



- 2. Select a Market to view your accounts pertaining to the selected market
- Information shown reflects your Citibank stockholdings in the respective currency of the selected market
- Refresh the page to view updated information
- Portfolio Value is your Citibank stockholdings of the respective market
- Available Funds is the amount of funds you have in the respective Cash Trading Account
- Receivable Funds indicate the amount of sales proceeds you would be receiving from successful "Sell" trades
- Total Buying Power is the sum of Available Funds and Receivables
- SMS and Snapshot Count is currently unavailable



### **Monitor Your Securities and Settlement Accounts - Portfolio Holdings**

1. Under My Account, click on Portfolio Holdings



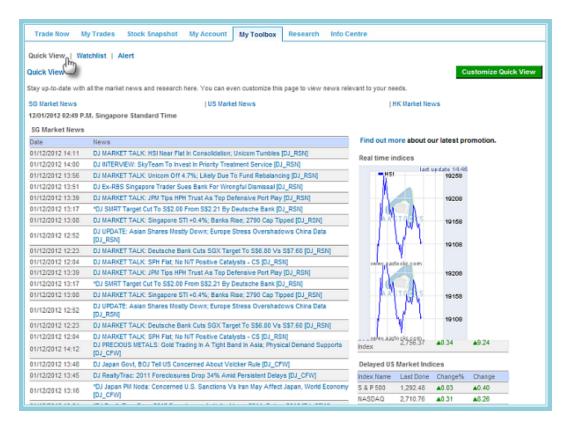
#### 2. Select Market

- Information shown reflects your Citibank stockholdings in the respective currency of the selected market
- Refresh the page to view updated information
- Click on ^ or v to sort your orders by Order Reference Number
- Click on > or < to sort your orders by time and date</li>
- Click on Customize Display to arrange, add or remove fields
- Click on Buy / Sell to proceed to Trade Now page to place your order
- Add your Singapore market stockholdings to portfolio under Transaction History to view the stockholdings here
- Sellable Qty does not include "Buy" trades that are pending settlement



### **Using Other Tools - My Toolbox**

1. Click on My Toolbox, select Overview



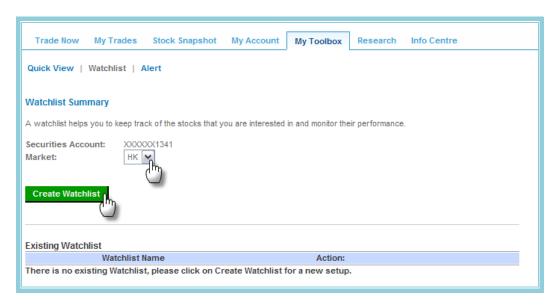
- HSI Chart is real-time
- Other indices are delayed by 15 to 20 minutes
- Click on Customize Quick View to arrange, add or remove fields
- Click on More News for more information
- You can view Worldwide Indices at the bottom of the page



# **Using Other Tools - Watchlist**

Please re-establish your Watchlist on our new server

1. Under My Toolbox, click on Watchlist



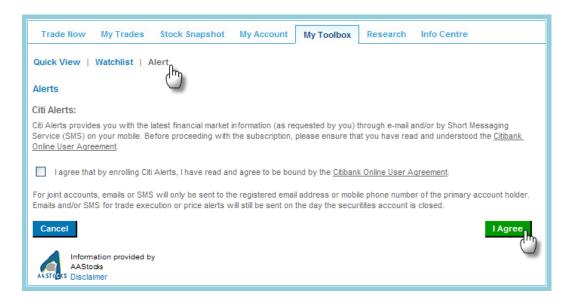
- 2. Select Market
- 3. Click on Create Watchlist
- Refresh the page to view updated information



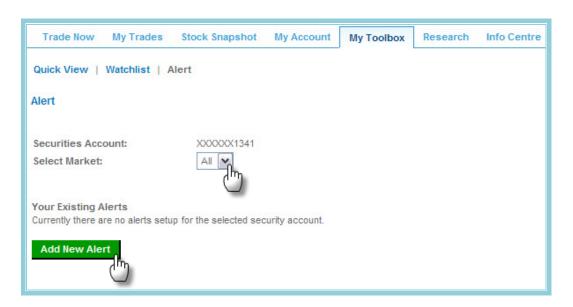
### **Using Other Tools - Alert**

Please re-establish your Price Alerts on our new server

1. Under My Toolbox, click on Alert



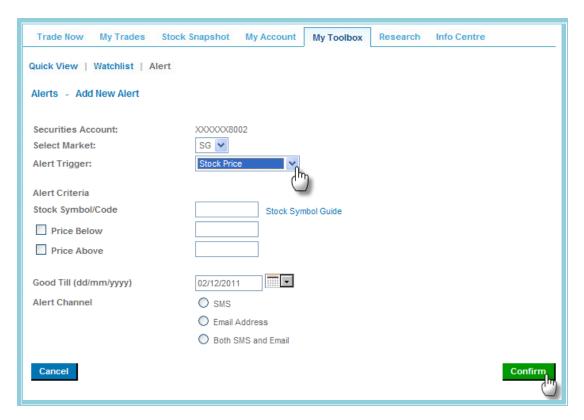
- 2. Read through the agreement terms and conditions and tick the checkbox to indicate that you have read and accept the terms and conditions
- 3. Click on I Agree
- 4. Select Market



5. Click on Add New Alert



6. Select Market and Alert Trigger



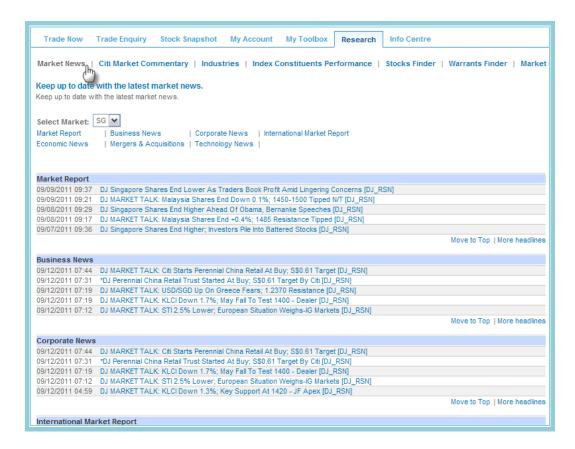
- 7. Enter or search for Stock Symbol
- 8. Enter Alert Criteria
- 9. Set Good Till (expiry) date for your alert
- 10. Select Alert Channel(s)
- 11. Click Confirm
- Alerts can be established by Primary or Secondary account holder, however, only Primary account holder will receive the alerts
- Alert Trigger are the type of conditions that will trigger an alert to you
- Listed company news alert is not available for Singapore market alerts



#### **Accessing Research Information - Research**

Stay updated with latest market news.

 Under Research, select Market News, Citi Market Commentary, Industries, Index Constituents Performance, Stocks Finders, Warrants Finder or Market to view the latest news



- Click on More headlines to generate 20 results for the respective research category
- Citi Market Commentary leads you to Market Watch page



### For More Information - Info Centre

1. For other information on Brokerage, click Info Centre

