poems

POEMS Mobile 3 User Guide

Scan the QR code to download the app

Available on the App Store

Available on Google Play

DISCLAIMERS ON THE USE OF THIS USER GUIDE

The information contained in this presentation has been obtained from public sources which PSPL has no reason to believe are unreliable and any analysis, forecasts, projections expectations and opinions (collectively the "Research") contained in this presentation are based on such information and are expressions of belief only. PSPL has not verified this information and no representation or warranty, express or implied, is made that such information or Research is accurate, complete or verified or should be relied upon as such. Any such information or Research contained in this presentation is subject to change, and PSPL shall not have any responsibility to maintain the information or Research made available or to supply any corrections, updates or releases in connection therewith. In no event will PSPL be liable for any special, indirect, incidental or consequential damages which may be incurred from the use of the information or Research made available, even if it has been advised of the possibility of such damages.

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.

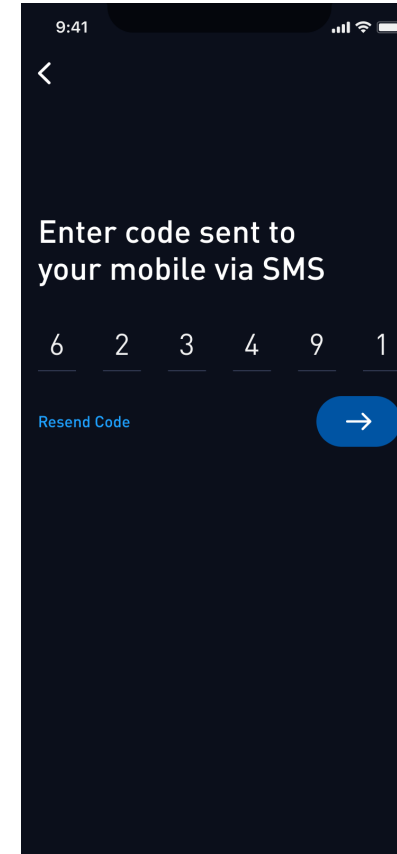# Contents

New Users Registration

Mobile Number | Email Address | Password Reset | Open POEMS Account
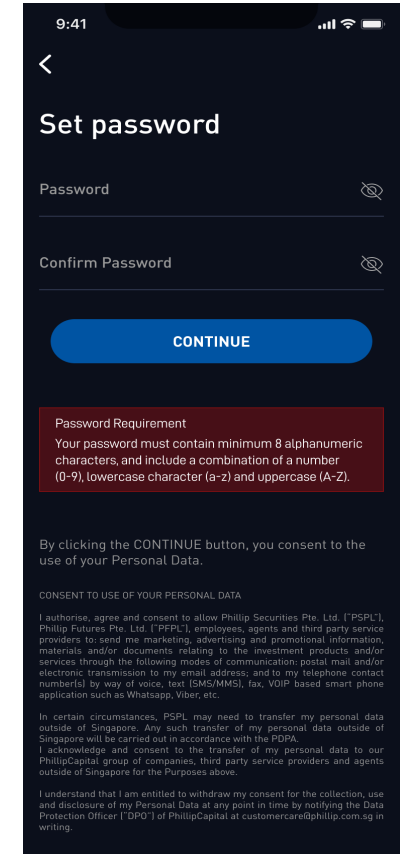

Step 1: Launch the POEMS Mobile 3 App and select the "SIGNUP" button

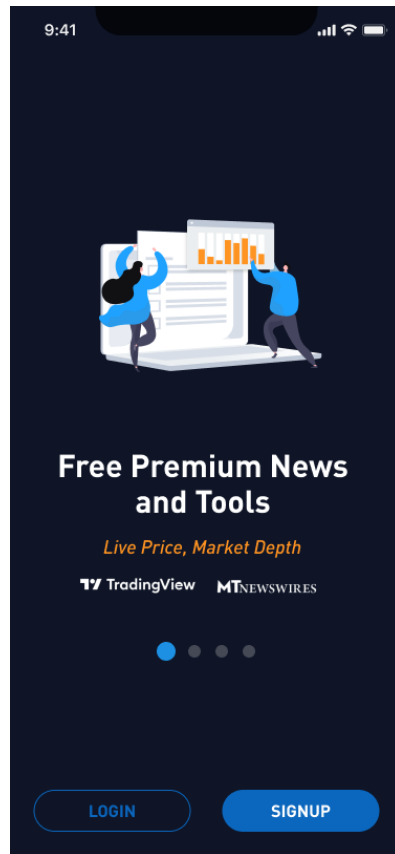**Step 2:** Enter your mobile number based on your country code

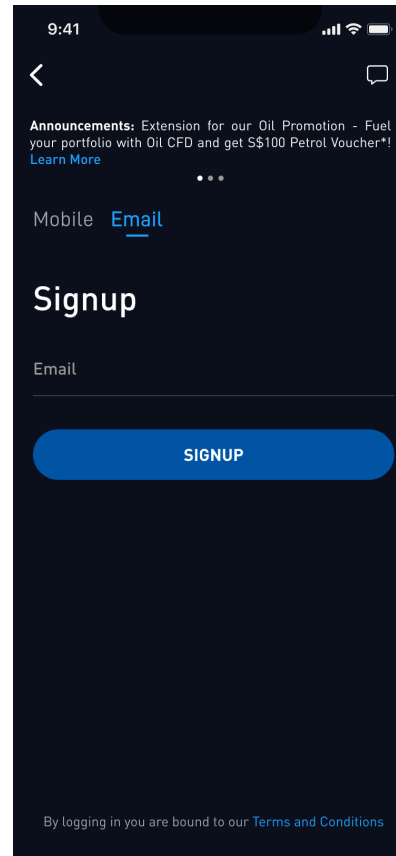**Step 3:** Enter the code sent to your mobile via SMS for verification

Step 4: Set your password to register
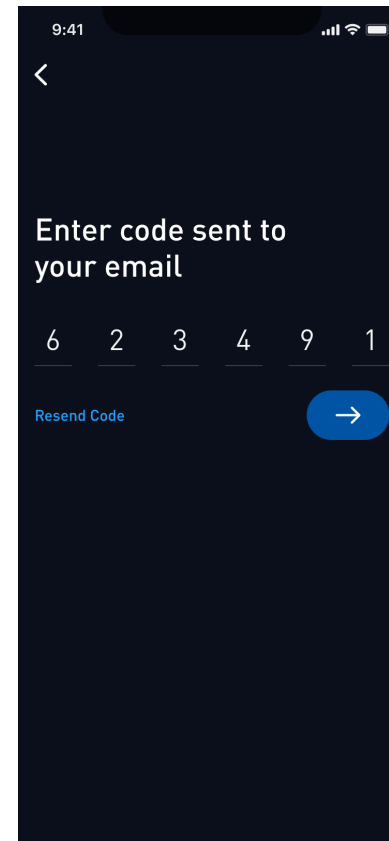
New Users Registration

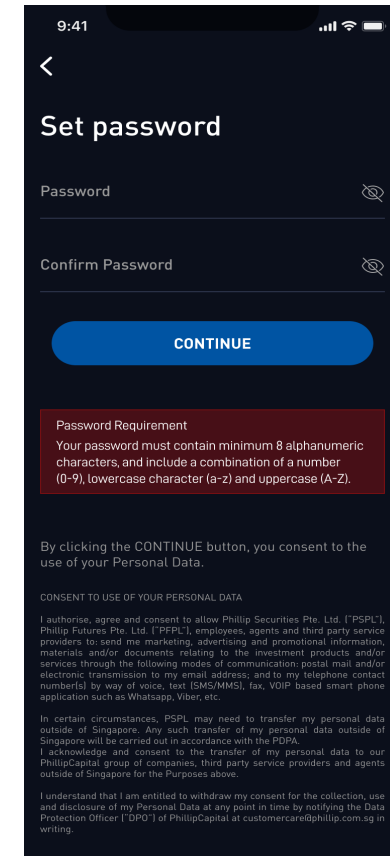Mobile Number | **Email Address** | Password Reset | Open POEMS Account

Step 1: Launch the POEMS Mobile 3 App and select the "SIGNUP' button
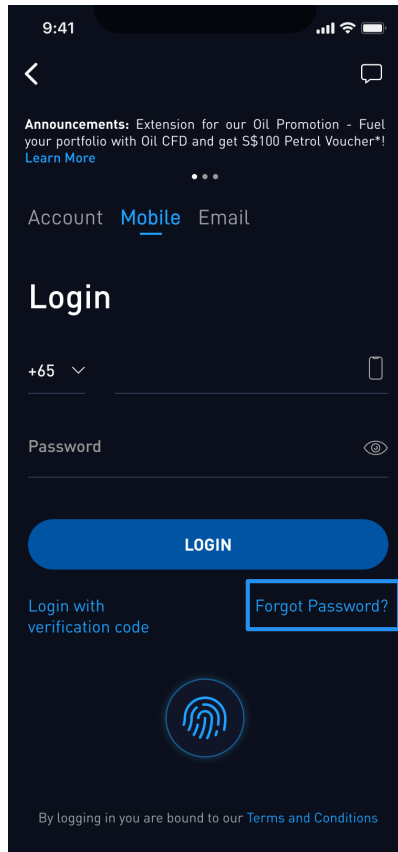
Step 2: Enter your Email Address

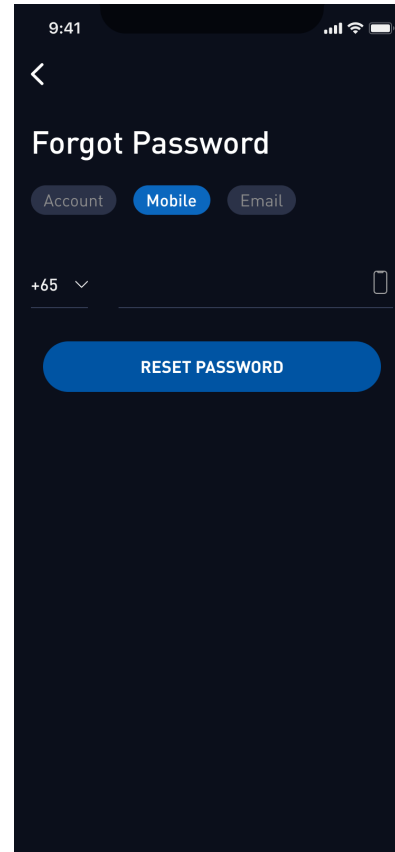**Step 3:** Enter the code sent to your email address for verification
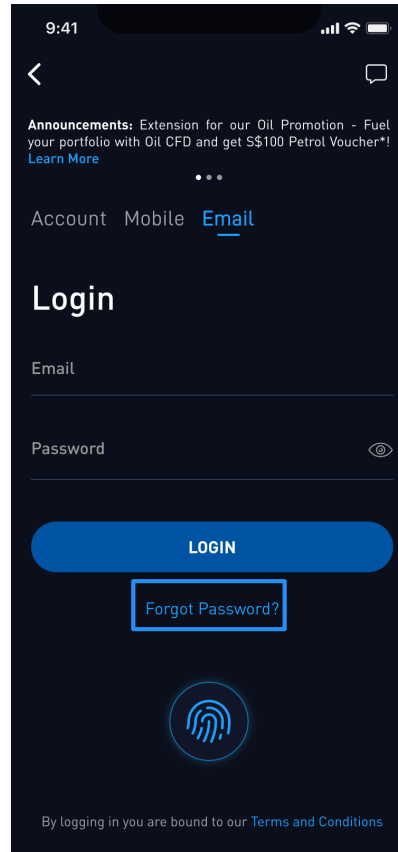
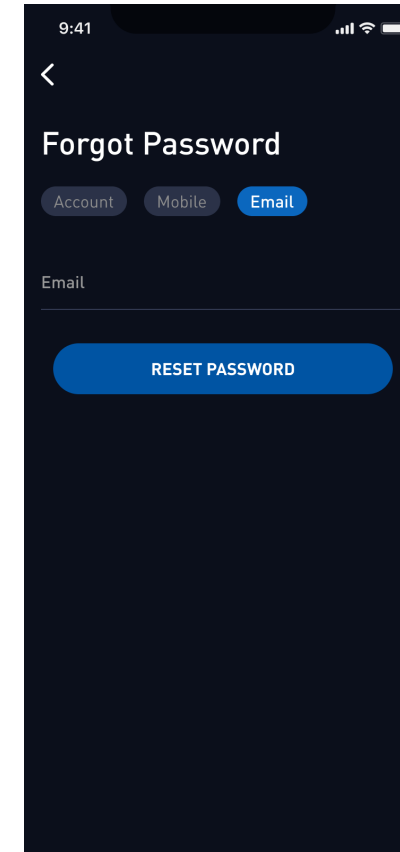**Step 4:** Set your password to register

New Users Registration

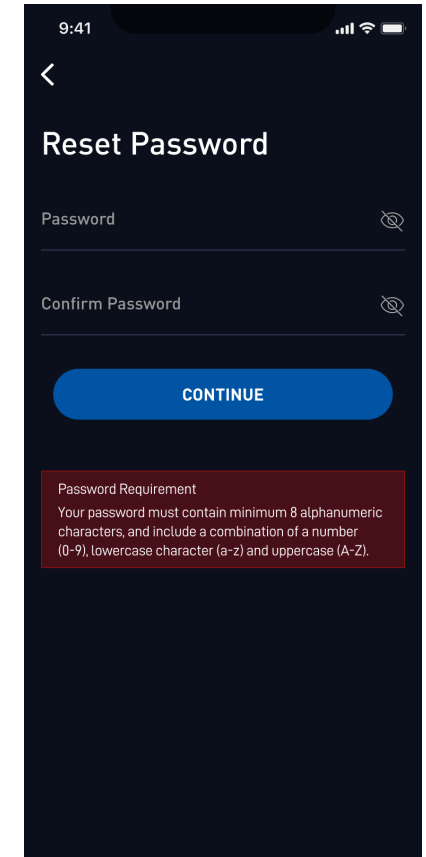## Mobile Number | Email Address | **Password Reset** | Open POEMS Account

Step 1: Launch the POEMS Mobile 3 App and select the "Forgot Password"
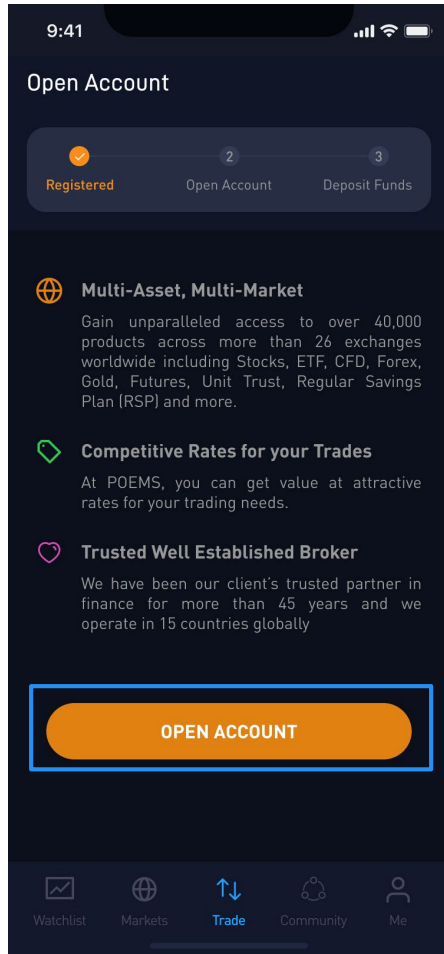
Step 2: Enter your Mobile Number
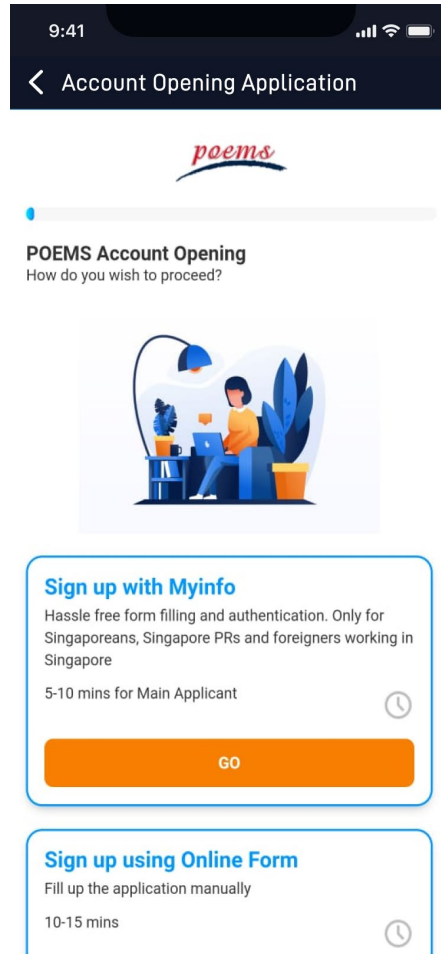
Step 2: Enter your Email Address

Step 3: Enter the new password and click Continue
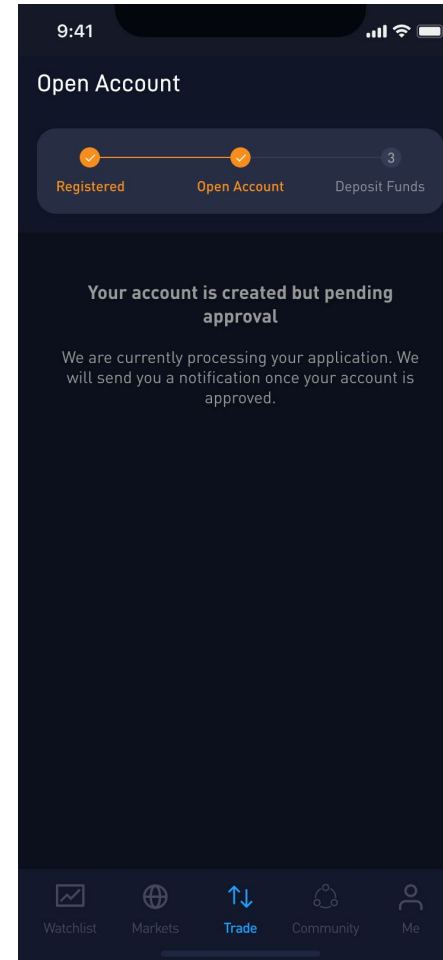
New Users Registration

Mobile Number l Email Address l Password Reset l **Open POEMS Account**
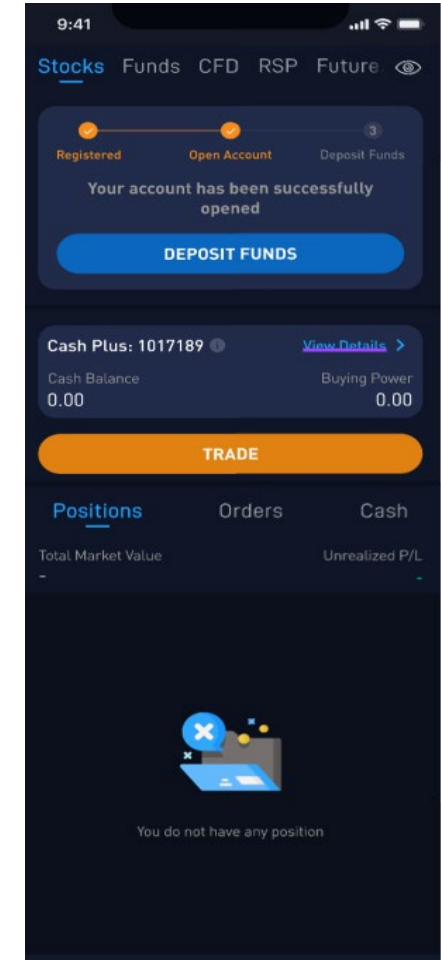

Step 1: Head to the "Trade" tab and select Open Account button.

Step 2: Open a POEMS Account either using Myinfo or online form.

**Step 3:** Upon submission of the form, your Account will take a few working days to get approved.

Step 4: Upon successful Account opening, you can deposit your funds into your Account.
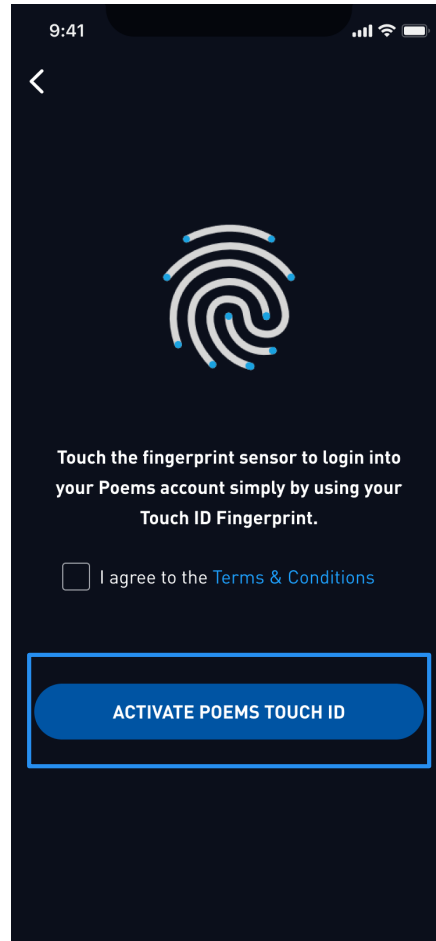
Getting Started

Touch ID/Face ID l POEMS Digital Token l One-Time Pin (OTP) using POEMS Digital Token l Scenarios for setting up 2FA on different Mobile Apps l Switch Accounts l SMART Portfolio (Robo)
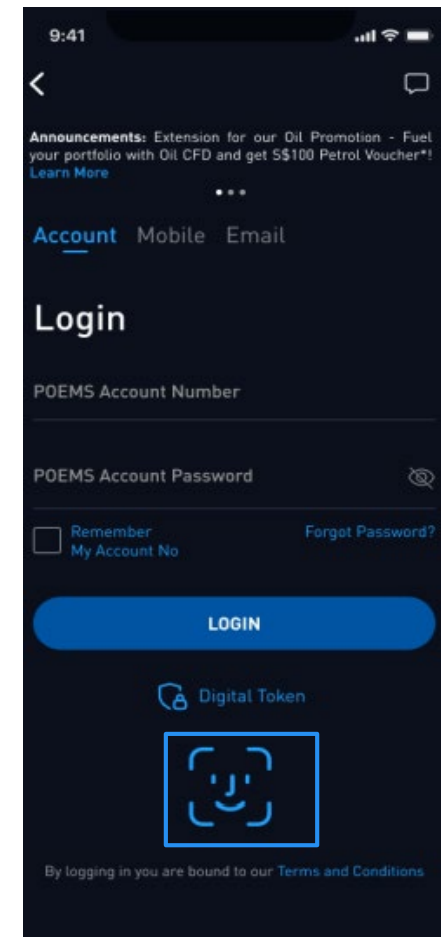
Touch ID
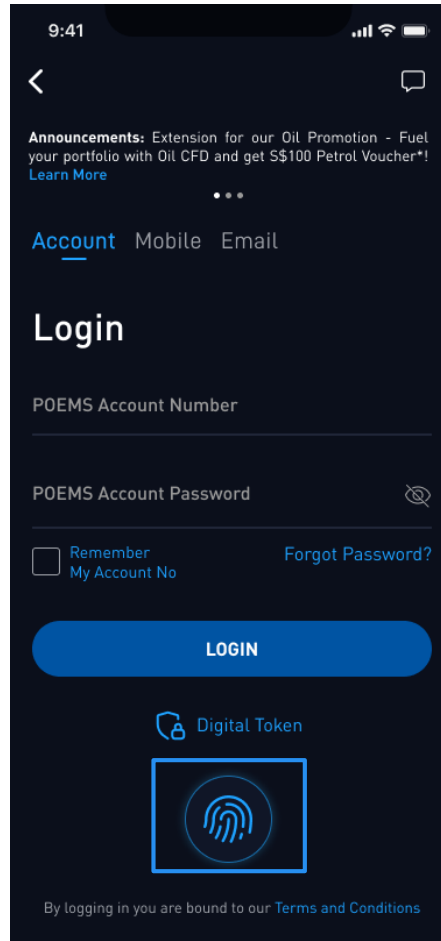
Face ID

Step 1: Launch the POEMS Mobile 3 App and select the fingerprint
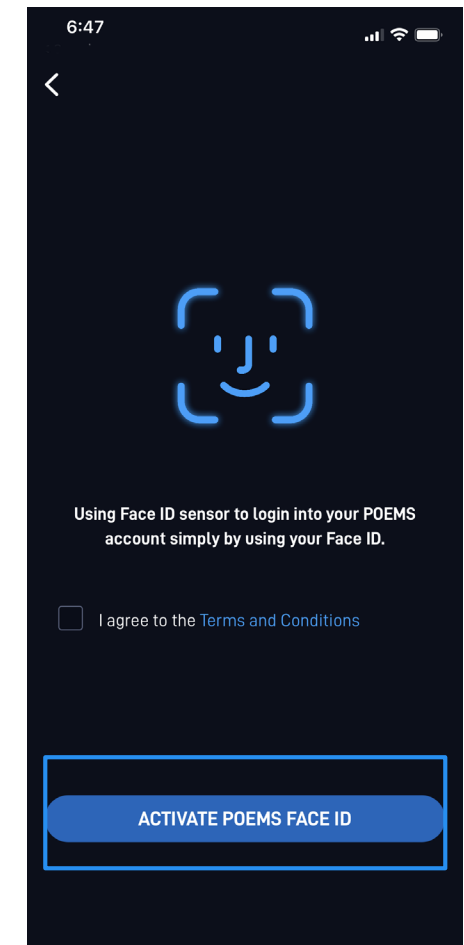
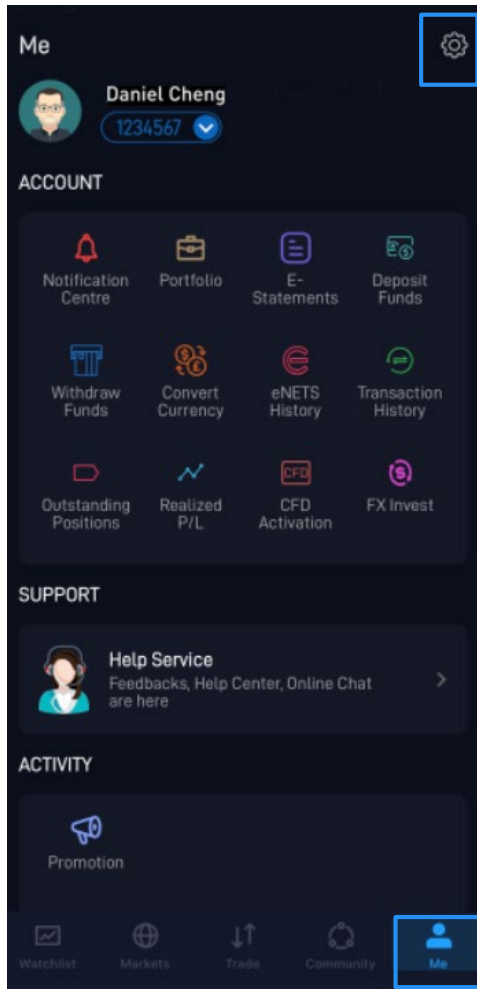**Step 2:** Tick the Terms & Conditions and select activate POEMS Touch ID

Step 1: Launch the POEMS Mobile 3 App and select the face icon

Step 2: Tick the Terms & Conditions and select activate POEMS Face ID

Getting Started

Touch ID/Face ID l **POEMS Digital Token** l One-Time Pin (OTP) using POEMS Digital Token l Scenarios for setting up 2FA on different Mobile Apps l Switch Accounts

Step 1: Go to "Me" tab > select Settings

Step 2: Select "Digital Token" > select 'Active Token'.

Step 3: Enter the activation code that will be sent to you via Email or SMS.
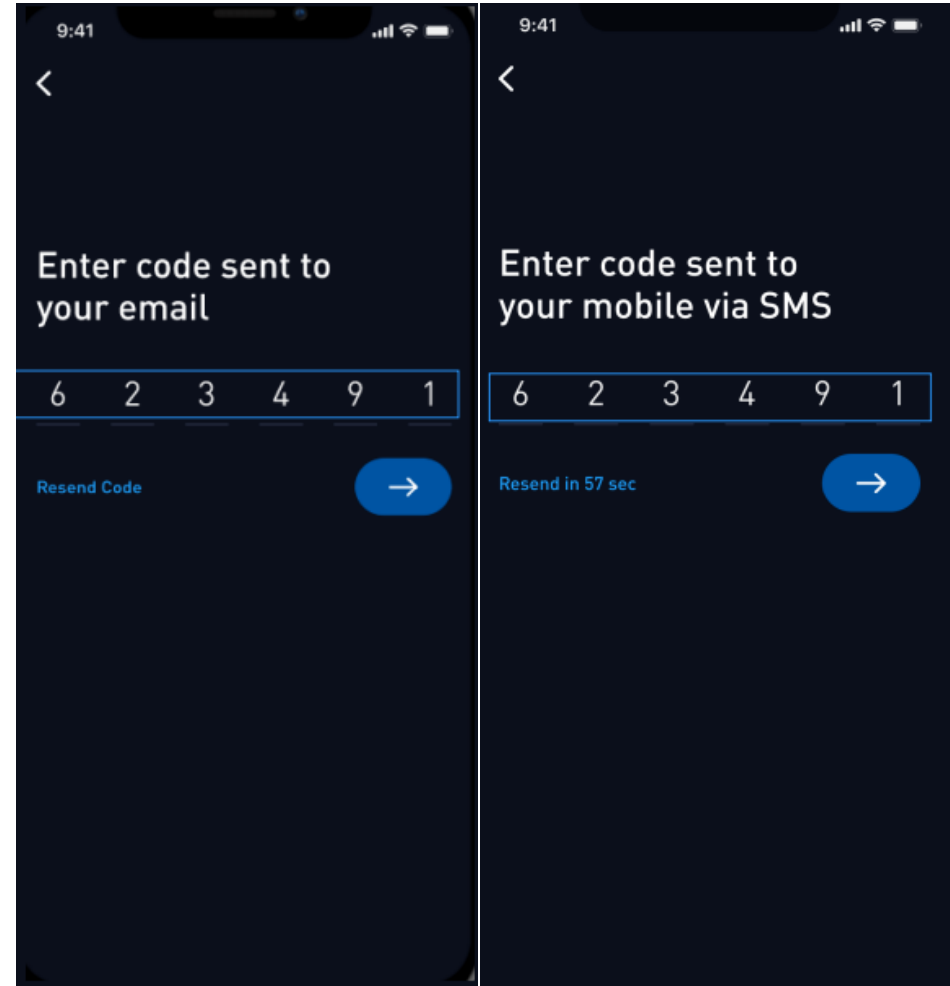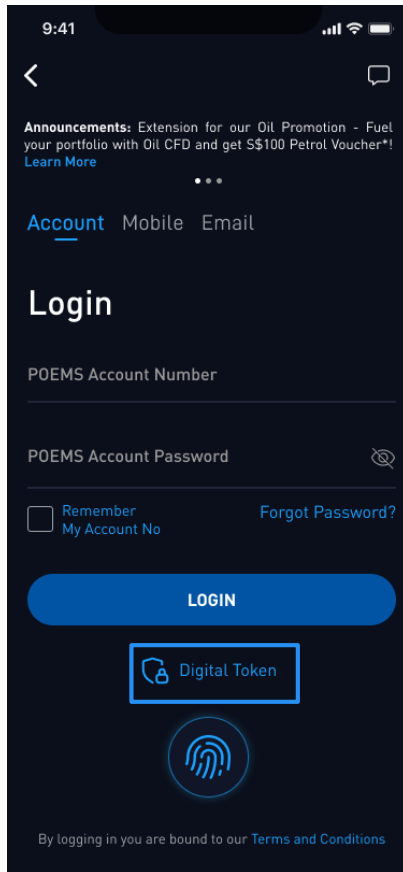
Getting Started

Touch ID/Face ID | POEMS Digital Token | **One-Time Pin (OTP) using POEMS Digital Token** | Scenarios for setting up 2FA on different Mobile Apps | Switch Accounts
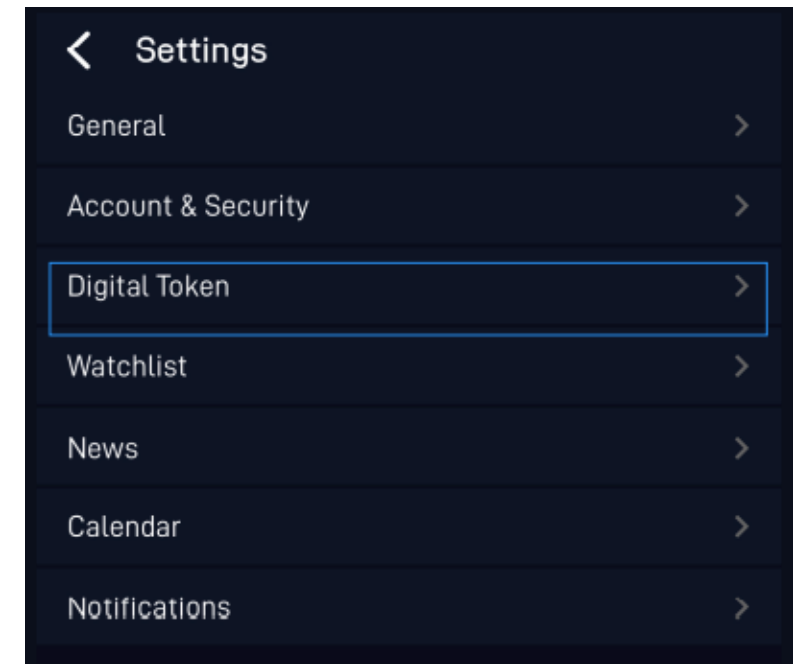
Method 1:

Method 2:

OR

Step 1: Tap on the Digital Token icon on the login screen of the POEMS Mobile 3 App

Step 1: Login to your Account and select 'Digital Token' under Settings

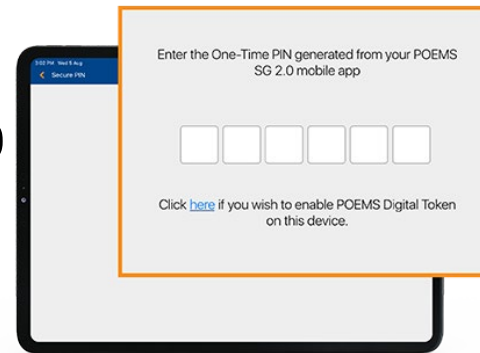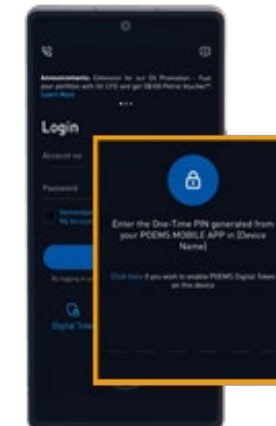# Getting Started

POEMS 2.0

POEMS Pro

POEMS Mobile 2.0

POEMS Mobile 3

Step 2: Enter the generated OTP on the platform of your choice to access your Account.

Getting Started

1) What if I have only downloaded POEMS Mobile 3 App?

You can set up 2FA via POEMS Mobile 3 App, either via the system prompt when you first login or Go to "Me" tab > select Settings > select "Digital Token" > select 'Active Token'.

2) What if I have only downloaded POEMS Mobile 2.0 App?

You can still continue to use 2FA on POEMS Mobile 2.0 App.
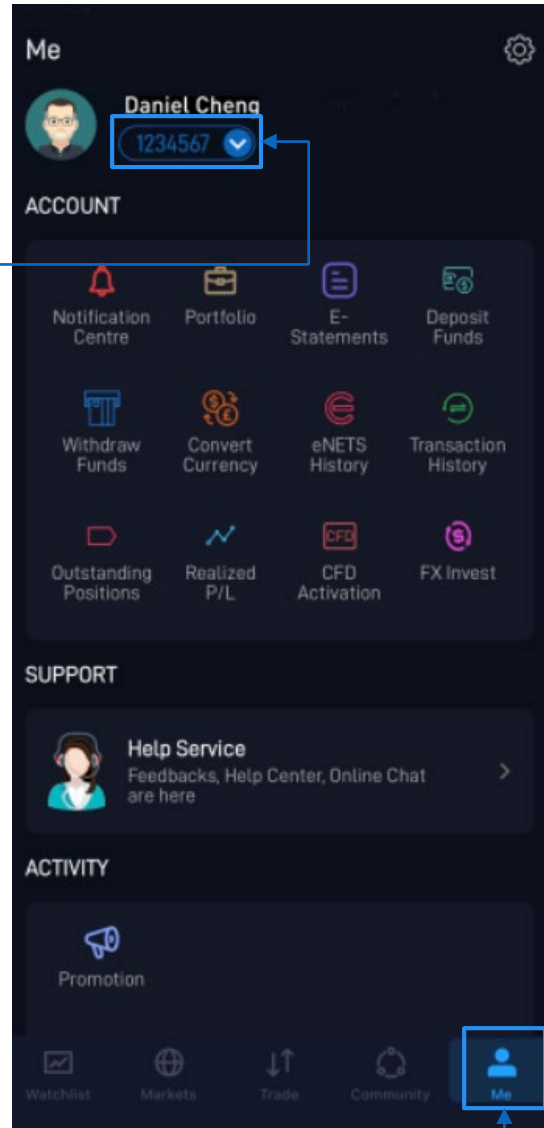
3) What if I have only downloaded both POEMS Mobile 3 App & POEMS Mobile 2.0 App?

- 2FA will only appear on the App that you have last set the digital token up.

- If you have set up 2FA on POEMS Mobile 3 App, you will need the OTP from POEMS Mobile 3 App to login to POEMS Mobile 2.0 App.

- If you wish to revert to POEMS Mobile 2.0 App to retrieve the OTP, click on the link provided on the OTP page from POEMS Mobile 2.0 App.

- If you choose not to set up 2FA on POEMS Mobile 3 App, please head over to POEMS Mobile 2.0 App for the OTP to login.
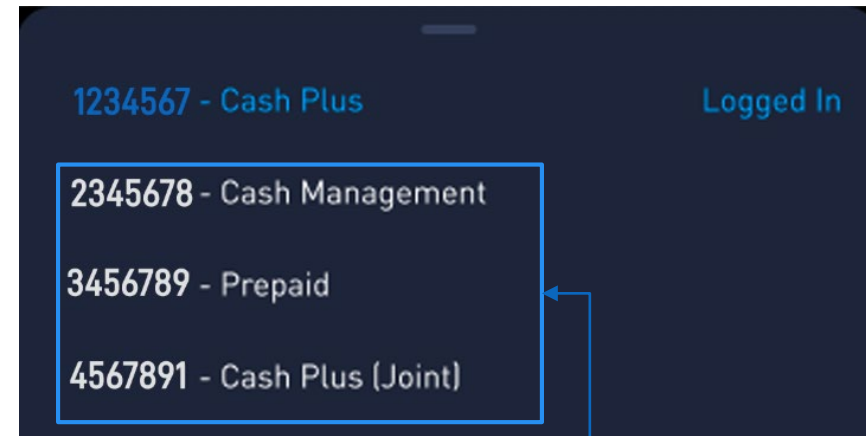
Getting Started

Step 2: Select the drop-down menu on the account no.
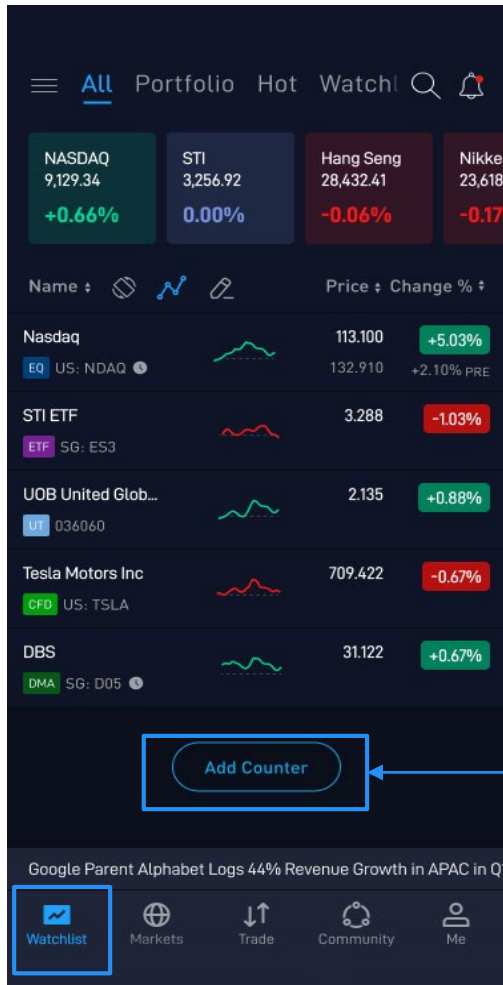
Step 1: Select 'Me' on the shortcut bar

Step 3: Select the account no. that you want to switch

13

Navigation

Add Counters to Watchlist | View Positions | View Order Status | Currency Conversion | View/Download E-Statement(s) | View Outstanding Position(s) | Set Price Notification(s) | Change Background Theme
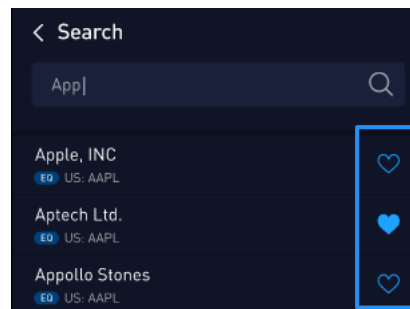
Method 1:

Step 1: Select 'Watchlist' on the shortcut bar

Step 2: Select 'Add Counter' at the bottom of the watchlist

Step 3: Search for your desired counter and tap on the Heart icon. The "Add to Watchlist" pop-up list will be shown and select the watchlist(s) you would like to add the counter by ticking the checkbox(s).
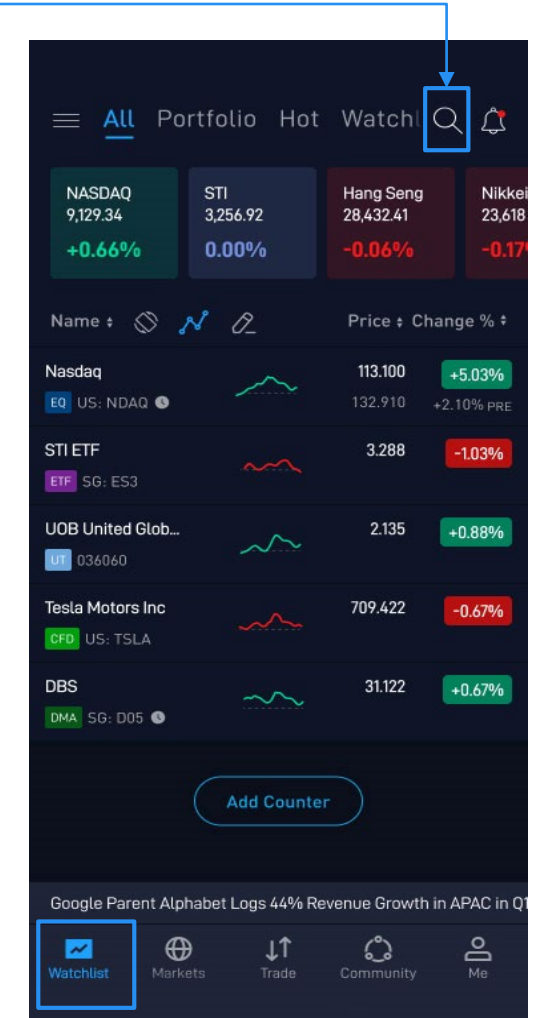
Method 2:

Step 1: Select 'Watchlist' on the shortcut bar

Step 2: Select the Search icon at the top

Step 3: Search for your desired counter and tap on the Heart icon. The "Add to Watchlist" pop-up list will be shown and select the watchlist(s) you would like to add the counter by ticking the checkbox(s).
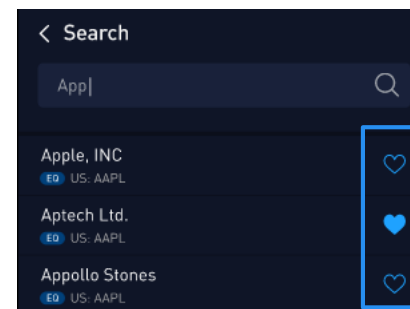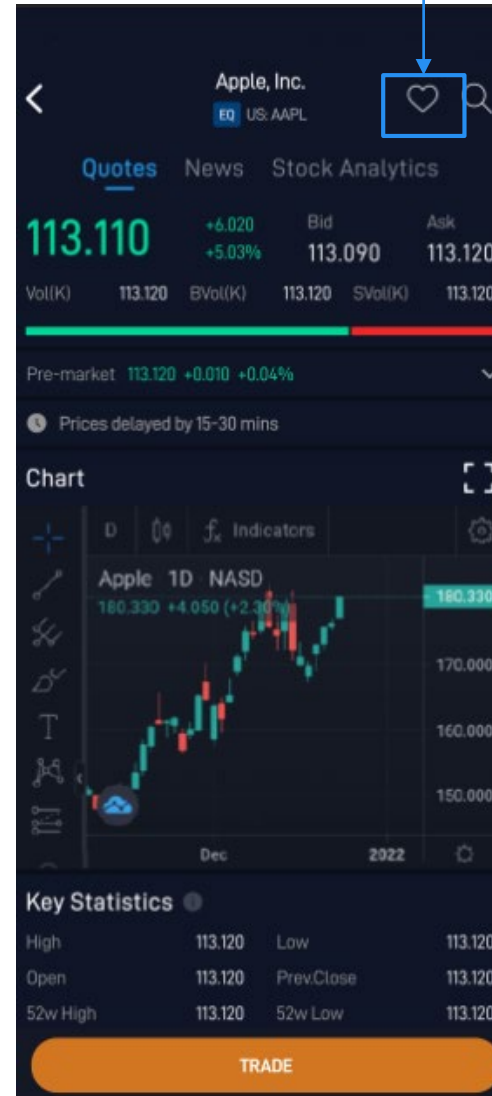

14

Navigation

Method 3:

Step 1: In the counter details page, tap on the Heart icon (Follow) at the top of the page and the counter will be added into the watchlist

Navigation

Add Counters to Watchlist | **View Positions** | View Order Status | Currency Conversion | View/Download E-Statement(s) | View Outstanding Position(s) | Set Price Notification(s) | Change Background Theme

Step 1: Select 'Trade' on the shortcut bar

Step 2: Select 'Positions' > 'Holdings'

Step 3: Select the desired counter

Navigation

Add Counters to Watchlist l View Positions l **View Order Status** l Currency Conversion l View/Download E-Statement(s) l View Outstanding Position(s) l Set Price Notification(s) l Change Background Theme

Step 1: Select 'Trade' on the shortcut bar

Step 2: Select 'Orders'

To view more details, simply tap on the order

Navigation

Step 3: Select 'Convert Amount' and key in the amount that you want to convert

Step 2: Select 'Cash' > 'Currency Conversion'

Step 1: Select 'Trade' on the shortcut bar

18

Navigation

Add Counters to Watchlist l View Positions l View Order Status l Currency Conversion l **View/Download E-Statement(s)** l View Outstanding Position(s) l Set Price Notification(s) l Change Background Theme

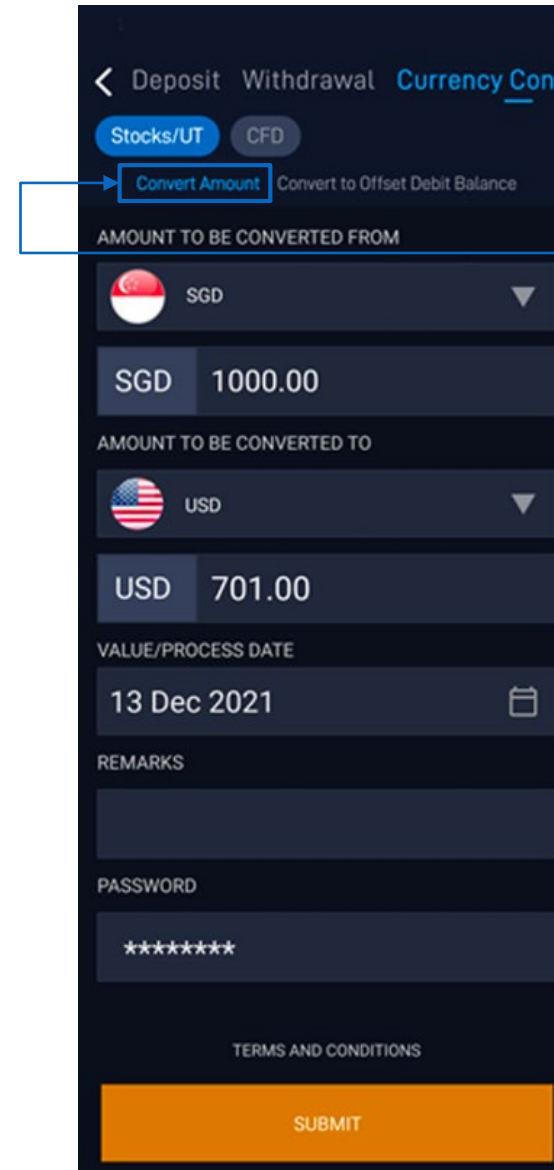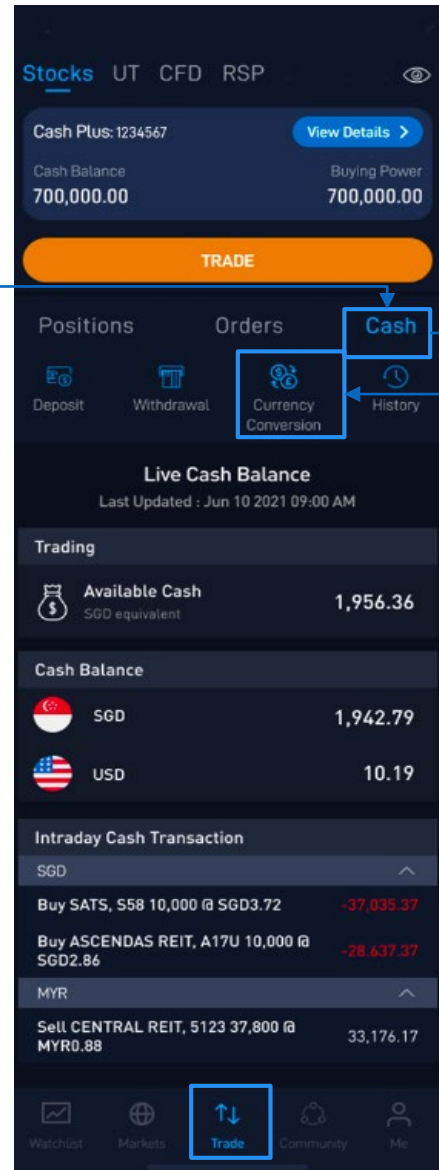**Step 1:** Select 'Me' on the shortcut bar

Step 2: Select 'E-Statements'
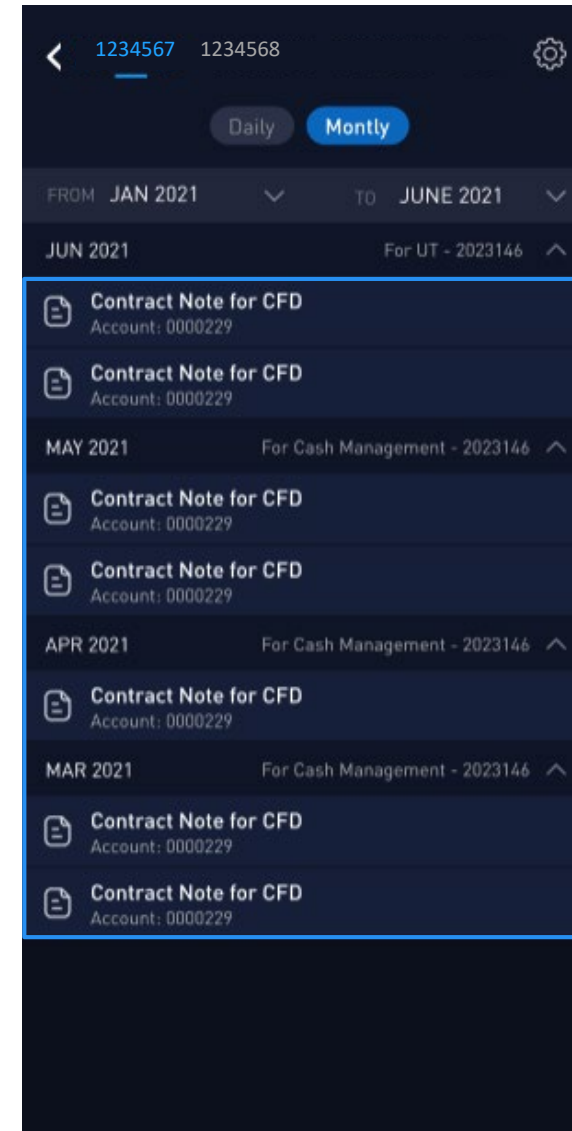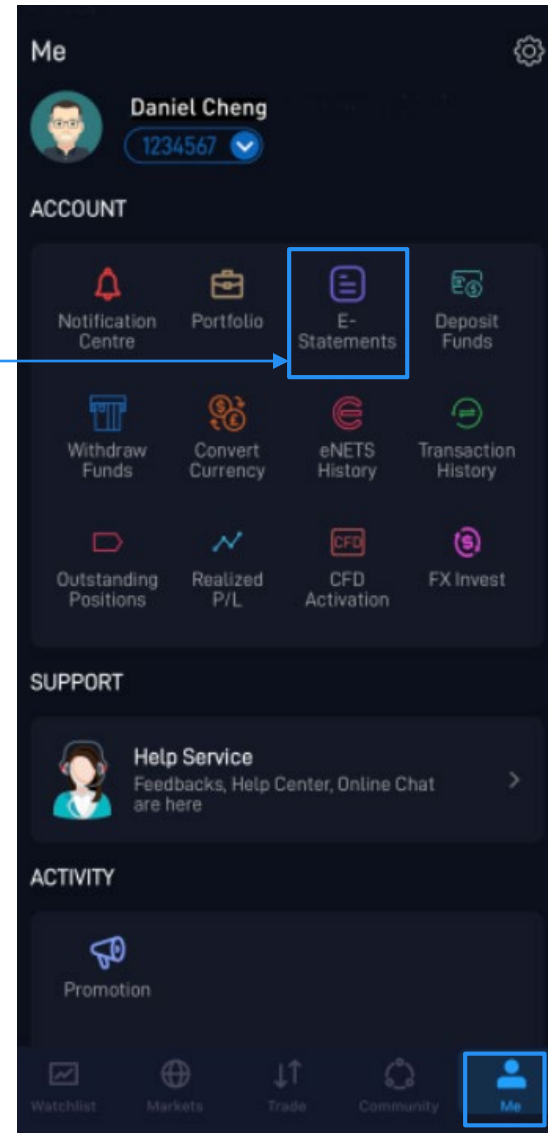
Step 3: Select the statement you wish to view or download

Navigation

Add Counters to Watchlist l View Positions l View Order Status l Currency Conversion l View/Download E-Statement(s) l **View Outstanding Position(s)** l Set Price Notification(s) l Change Background Theme

Step 3: Select 'Outstanding Positions'
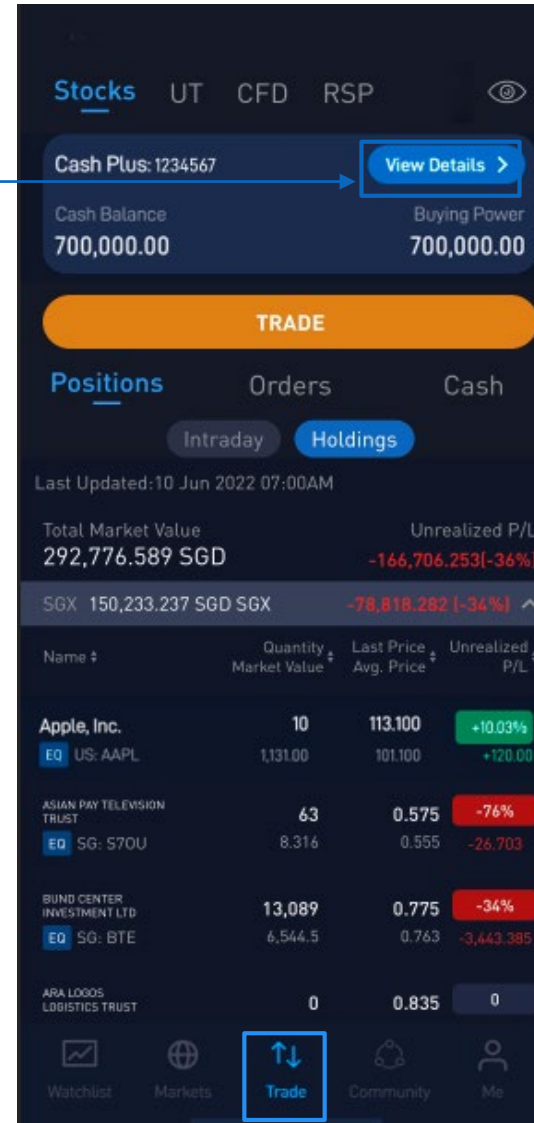
Step 1: Select 'Trade' on the shortcut bar
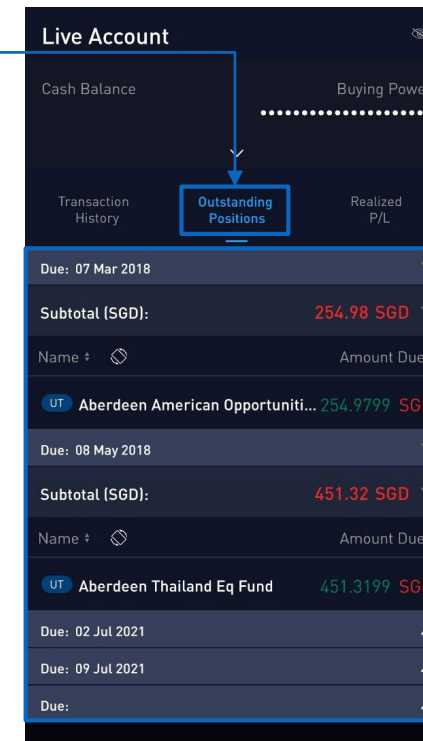
Step 2: Select 'View Details'

Navigation

Add Counters to Watchlist l View Positions l View Order Status l Currency Conversion l View/Download E-Statement(s) l View Outstanding Position(s) l **Set Price Notification(s)** l Change Background Theme

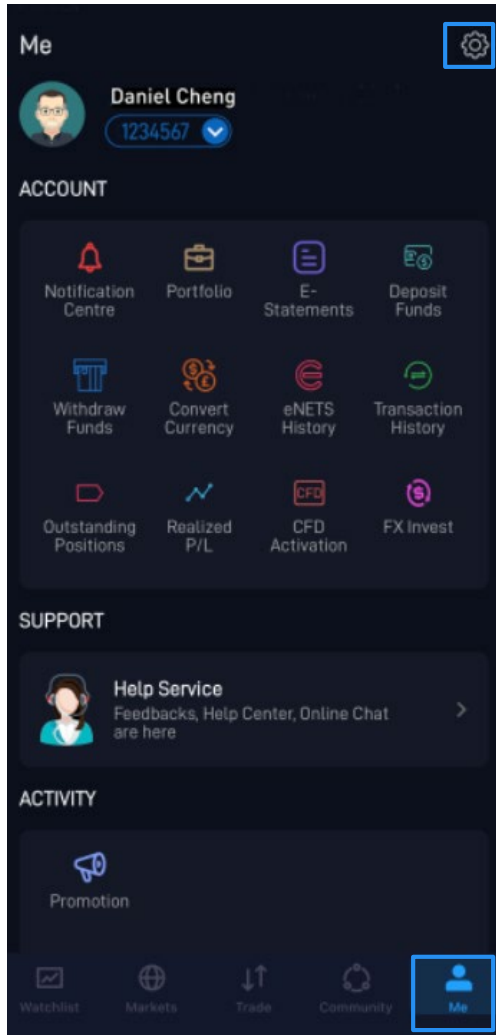**Step 1:** In the counter details page, tap on the Set Price Alert (CUSTOM) at the bottom

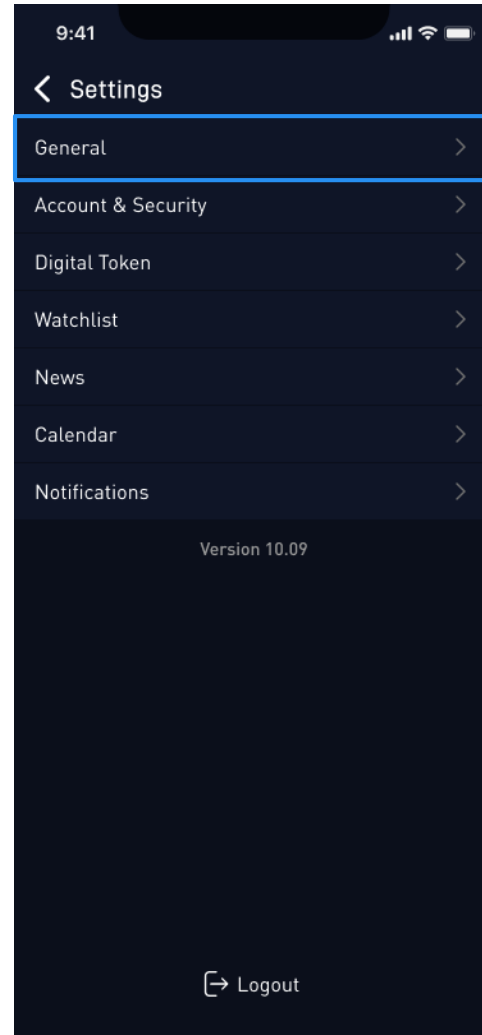**Step 2:** Key in the relevant information and tap 'CREATE' at the bottom

Navigation

Add Counters to Watchlist l View Positions l View Order Status l Currency Conversion l View/Download E-Statement(s) l View Outstanding Position(s) l Set Price Notification(s) l **Change Background Theme**

Step 1: Head to Me Tab and select Settings

Step 2: Select General

Step 3: Select Theme

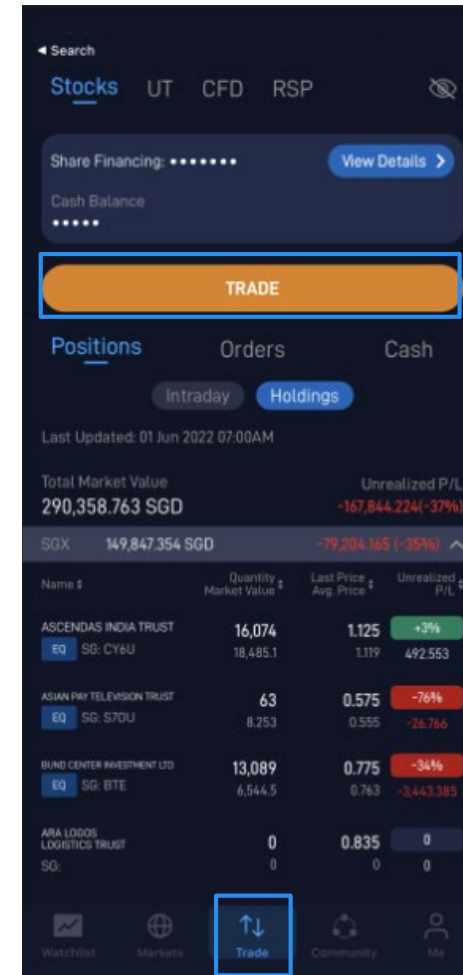**Step 4:** Select the theme colour that you desired.

Trade

Place a trade | Amend or withdraw a trade | Trade US Market Trading (Asian hrs)
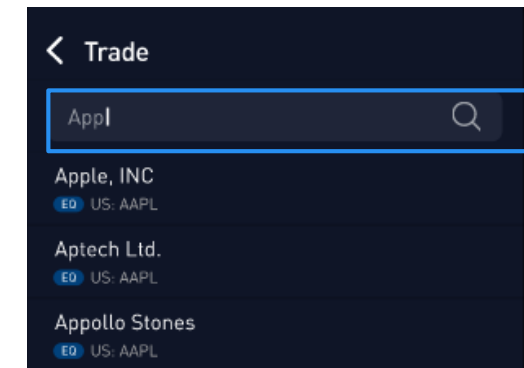

Method 1:

Step 1: In the counter details page, tap on 'TRADE' to open a trade ticket

Method 2:

Step 1: Select Trade' on the shortcut bar

Step 2: Tap on 'TRADE' button

Step 3: Search and tap on your desired counter to open a trade ticket

Trade

Place a trade | Amend or withdraw a trade | Trade US Market Trading (Asian hrs)

Step 1: In the trade ticket, key in the relevant information including the order type, price, quantity, payment type, currency, fill during and validity

Step 2: Select 'PLACE ORDER'

Swipe left and right to see the available order types

Step 3: An Order Confirmation window will appear; double check your order details and tap on 'CONFIRM'

Trade

Place a trade | **Amend or withdraw a trade** | Trade US Market Trading (Asian hrs)

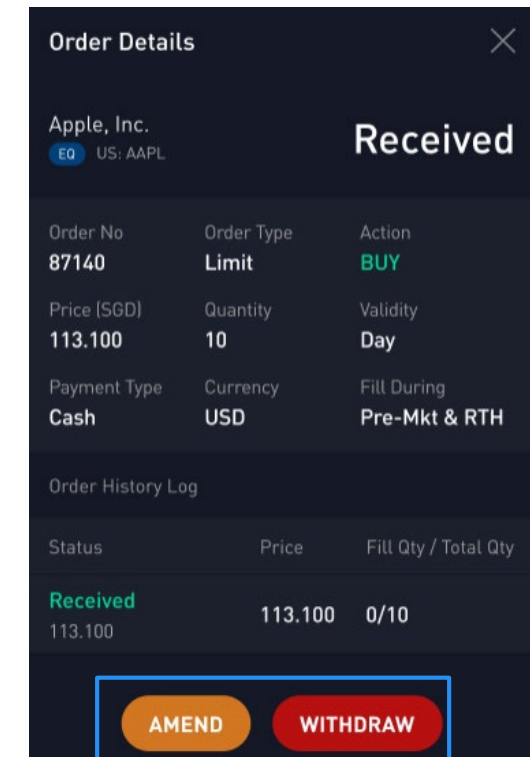Swipe left and right and select the asset type to view the respective positions

Step 1: Select 'Trade' on the shortcut bar

Step 2: Select 'Orders'

Step 3: Select the order you would like to withdraw/amend

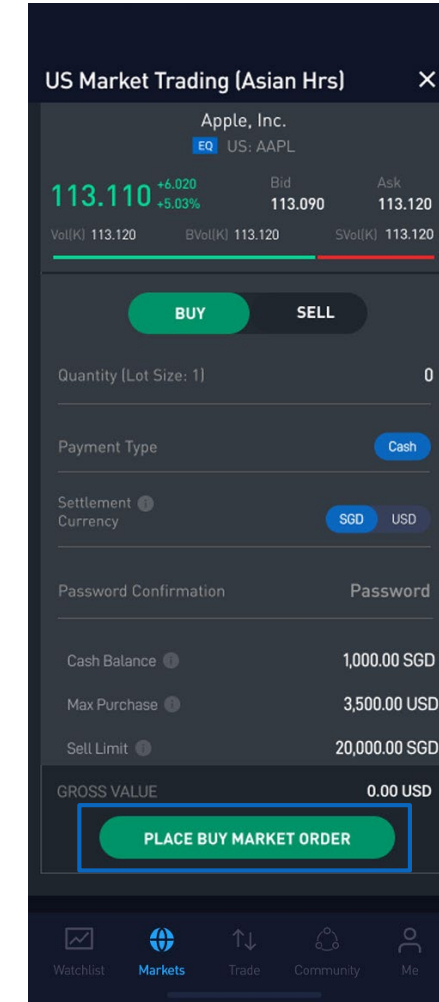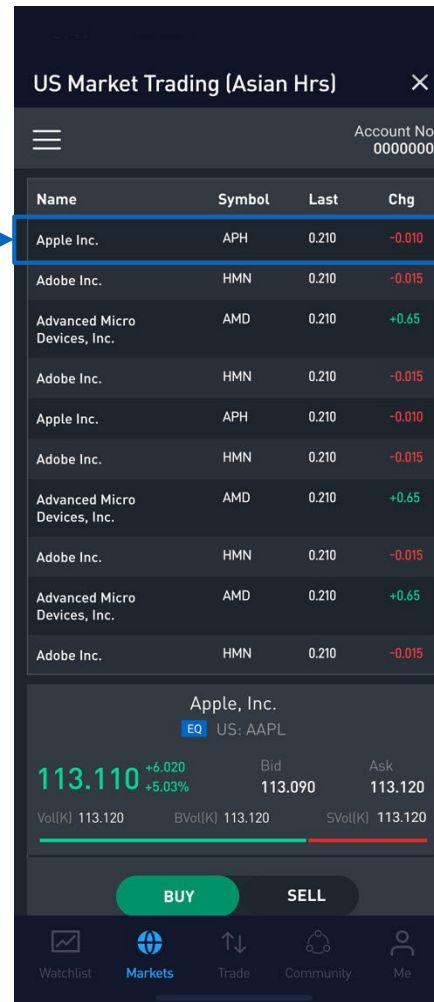**Step 4:** On the Order Details page, tap 'AMEND' or 'WITHDRAW'

Trade

Place a trade | Amend or withdraw a trade | **Trade US Market Trading (Asian hrs)**
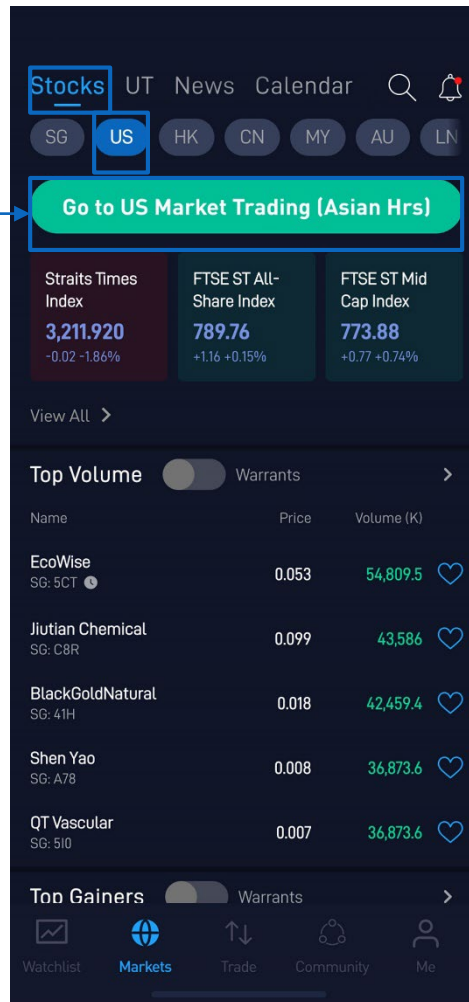
Step 1: Go to 'Markets" Tab > "Stocks" > "US" > "Go to US Market Trading (Asian Hrs)"

Step 2: Select the desired counter

Step 3: Select "Place Buy Market Order" to place order

Community

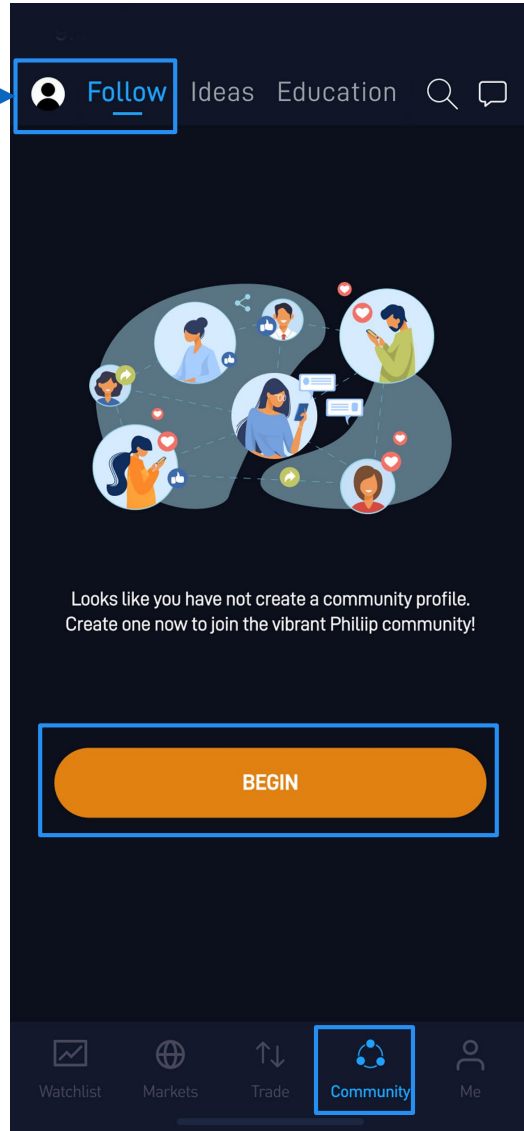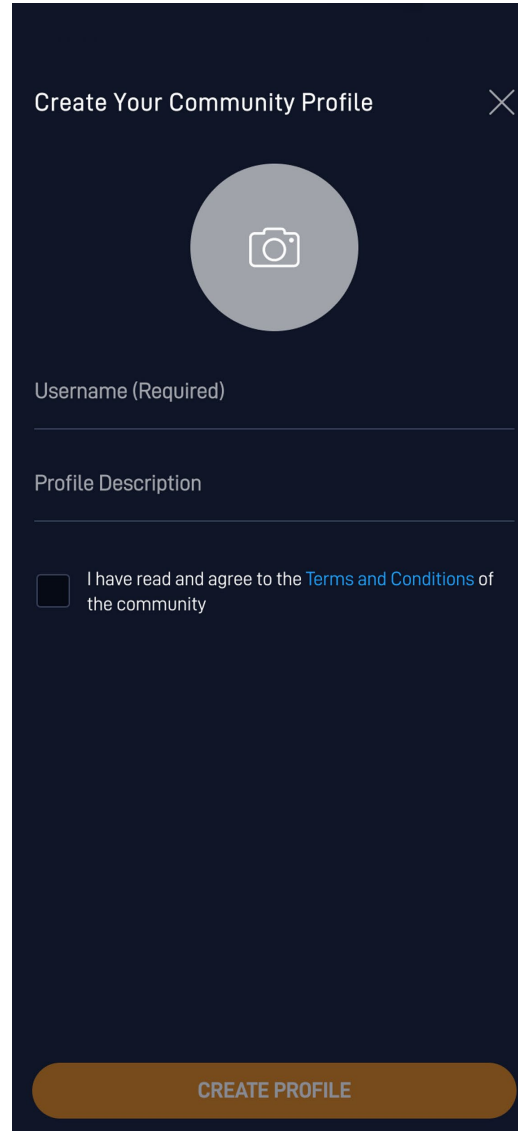## Create a Profile | Join the interest group(s) | Ideas | Education
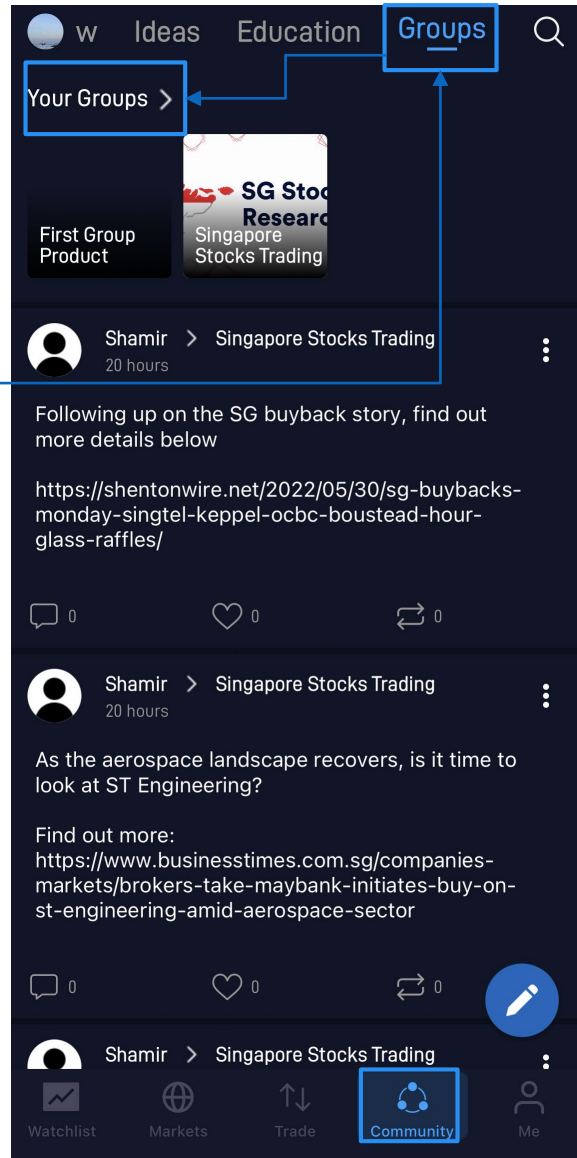
Step 2: Select 'Follow' Tab > Select "Begin"

Step 3: Enter your username, bio on the profile description, upload your picture, and tick the T&Cs > Select "Create Profile"

Step 1: Select 'Community' on the shortcut bar
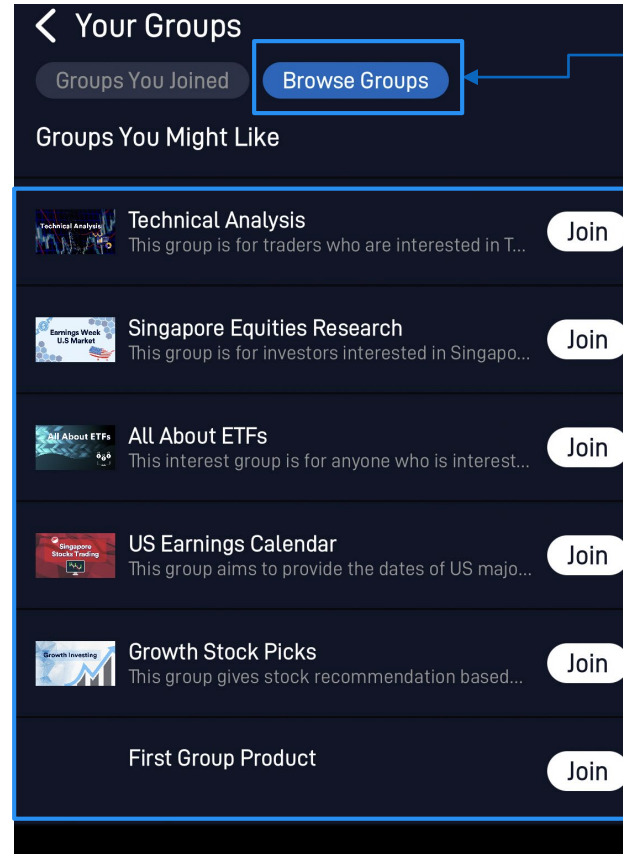
Community

Create a Profile | **Join the interest group(s)** | Ideas | Education

Step 2: Select 'Groups' Tab > Select "Your Groups"

Step 1: Select 'Community' on the shortcut bar

**Step 3:** Select 'Browse Groups' Tab > Select "Join" to the group/s that you want to join

Community

Create a Profile l Join the interest group(s) l **Ideas** l Education

Step 2: Select Ideas tab > check out our daily morning note, market journal, weekly market call, and analyst research reports on the sliding tab

Step 3: Check out the most traded stocks that is tailored to your portfolio using AI

Step 1: Select 'Community' on the shortcut bar
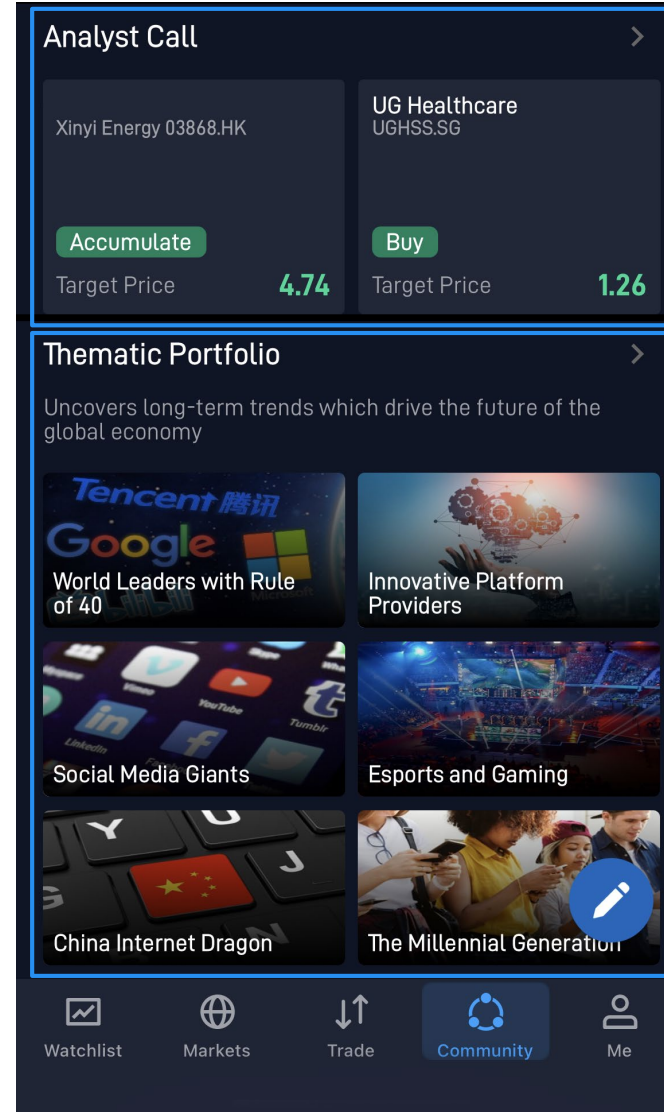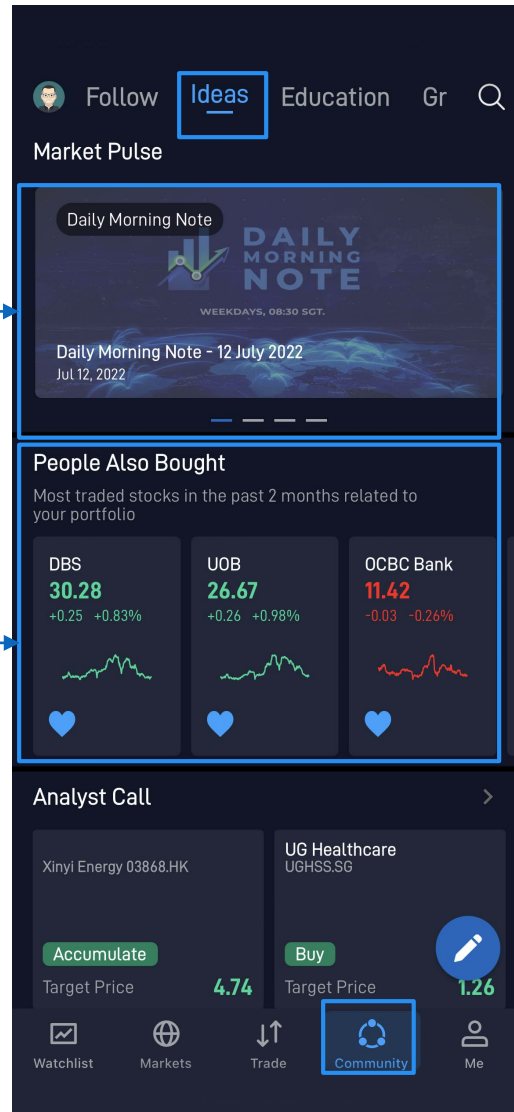
Step 4: Scroll down to keep track of our in-house research analysts' call on stocks with the target price

Step 5: Explore our thematic portfolio that covers various topics including rule of 40, social media, gaming, and many more.
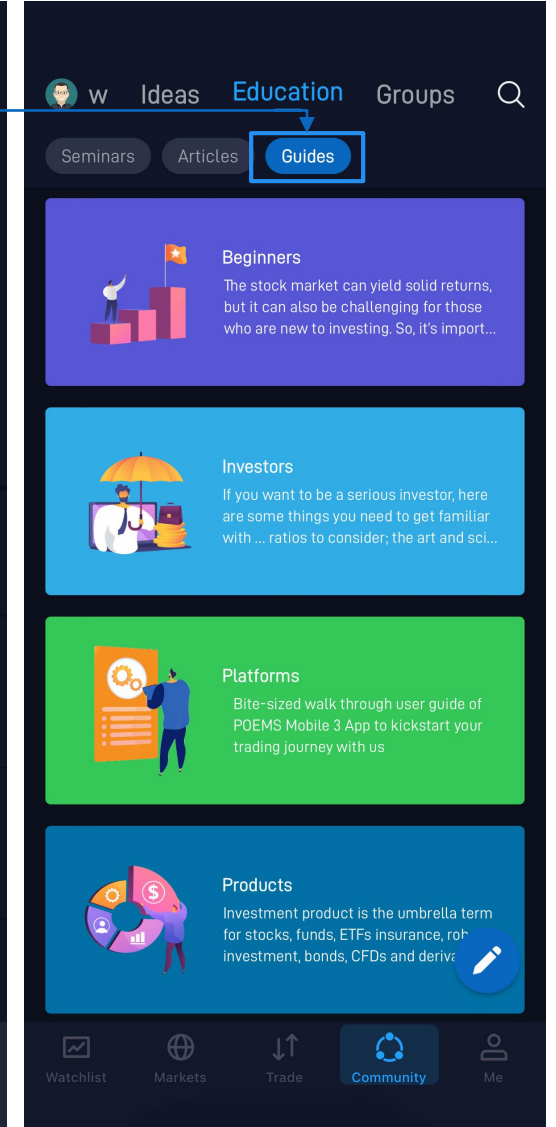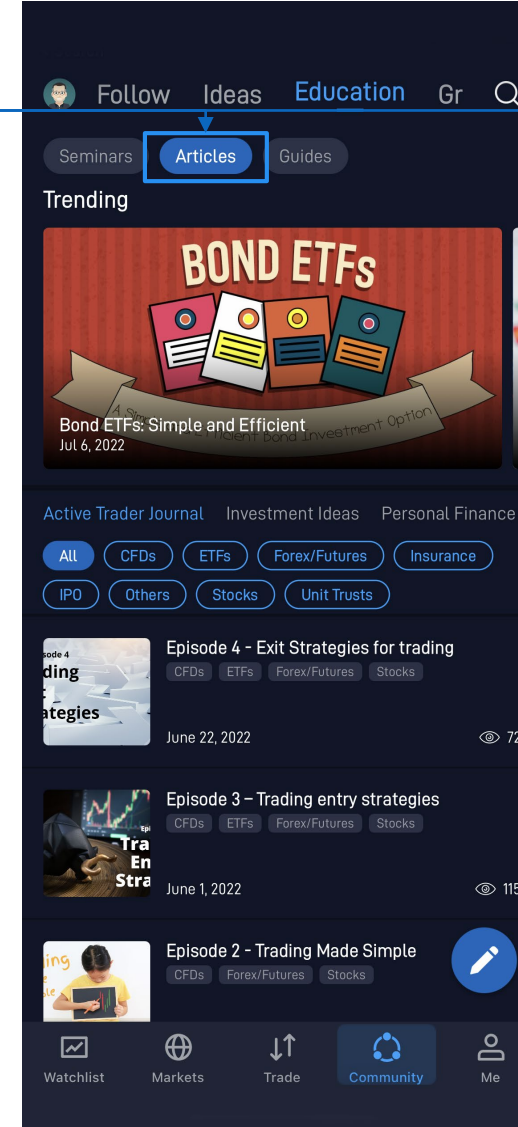
Community

Create a Profile | Join the interest group(s) | Ideas | **Education**

Step 2: Head to "Education" tab > "Seminars" to sign up for free seminars/webinars
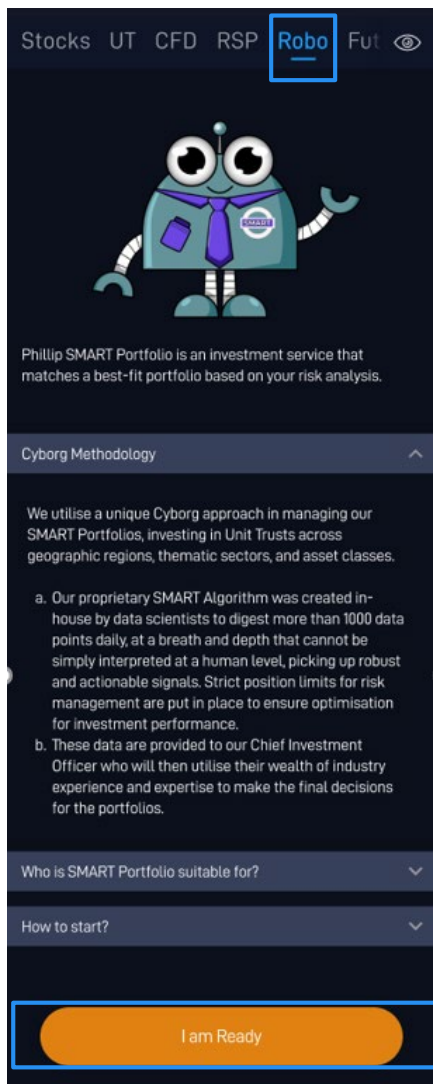
Step 1: Select 'Community' on the shortcut bar

Step 3: Head to "Articles" and "Guides" sections to read our investment articles/guides that covers trending topics based on the market
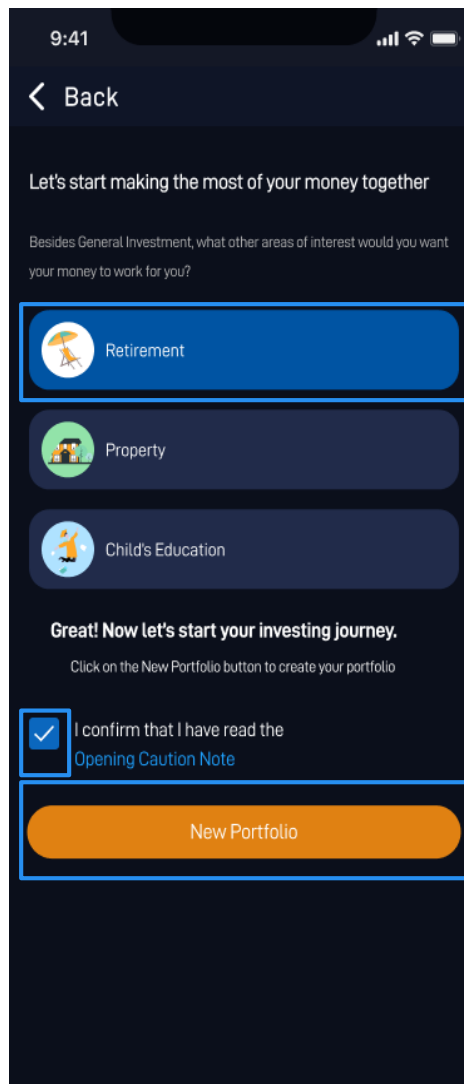
SMART Portfolio (Robo)

Open a SMART Portfolio (Robo) Account I Deposit funds on SMART Portfolio (Robo) Account
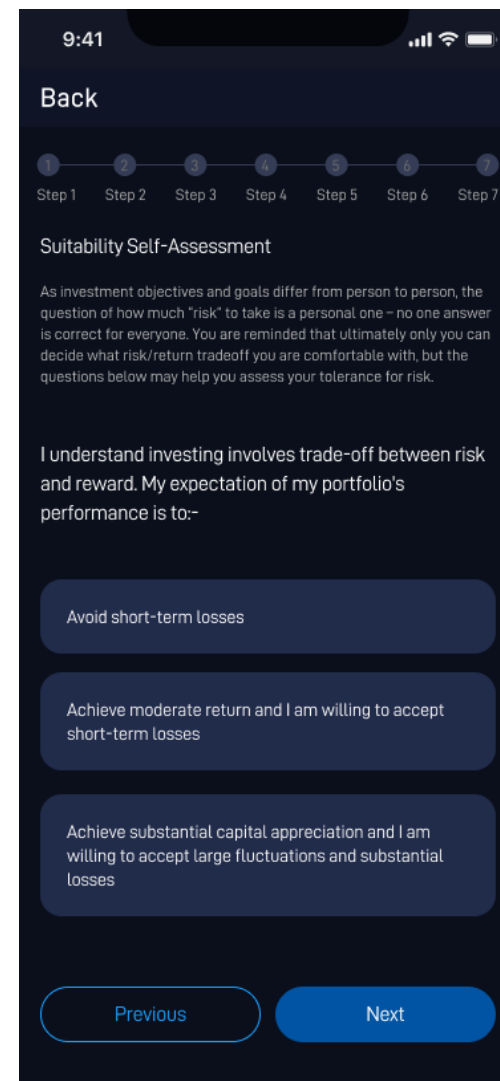
Step 1: Select 'Robo' on the top tab.

Step 2: Select 'I am Ready" button to explore.

Step 3 : Select the category that you are interested in.

Step 4 : Check the box "I confirm…" and proceed to click on "New Portfolio" button.

Step 5 : Take the Suitability Self-Assessment to match the portfolio that is suitable for your risk personality.

SMART Portfolio (Robo)

Open a SMART Portfolio (Robo) Account I Deposit funds on SMART Portfolio (Robo) Account

Step 6: Select the Account type by fund source that you wish to invest in.

Step 7: Select the Account Opening mode (SingPass or Online form)

Upon submission, you may deposit your funds into your Account first.

SMART Portfolio (Robo)

Open a SMART Portfolio (Robo) Account **I Deposit funds on SMART Portfolio (Robo) Account**

Upon successful Account opening, click on the deposit tab to deposit funds to start your SMART Portfolio (Robo) investment.
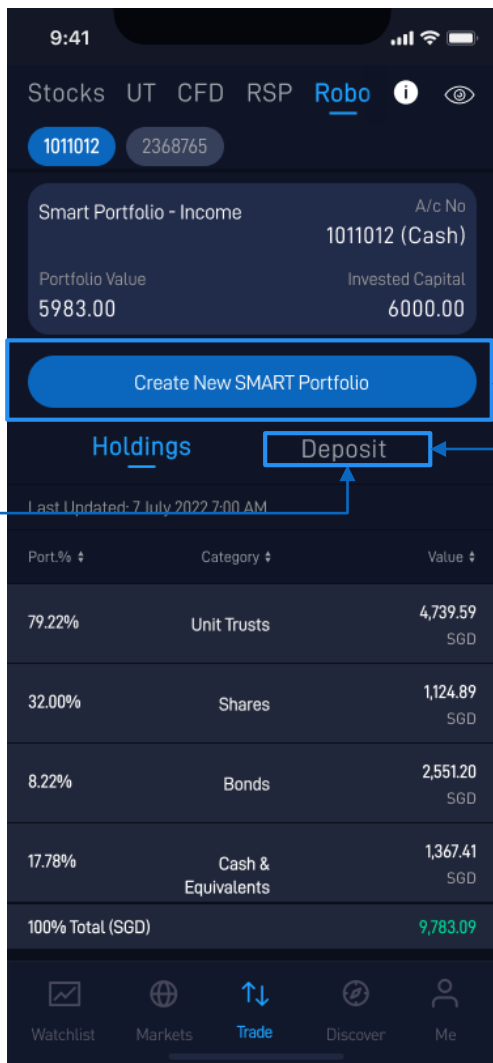
To set up another SMART Portfolio, select "Create New SMART Portfolio" to start.

To deposit cash to SMART Portfolio (Robo), use PayNow function to do so.

Note: Indicate your 7 digits SMART Portfolio (Robo) Account number under payment reference.

To use SRS fund to SMART Portfolio (Robo), click on the deposit tab.

Download the SRS Transaction form and email to digichannel@phillip.com.sg