



POEMS Mobile 3 User Guide

Scan the QR code to download the app



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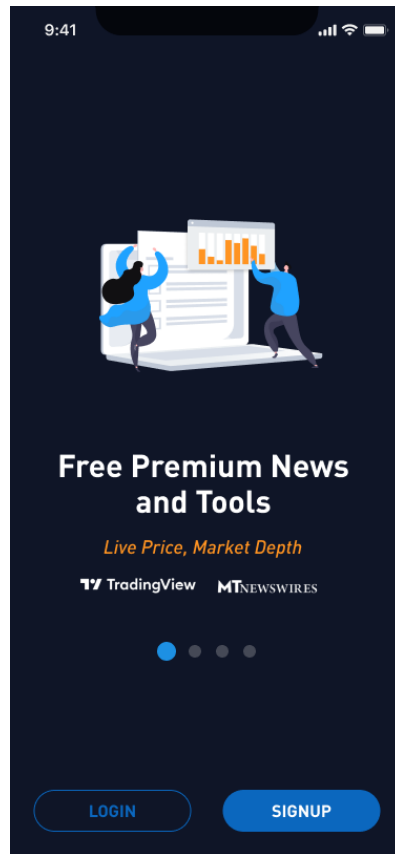
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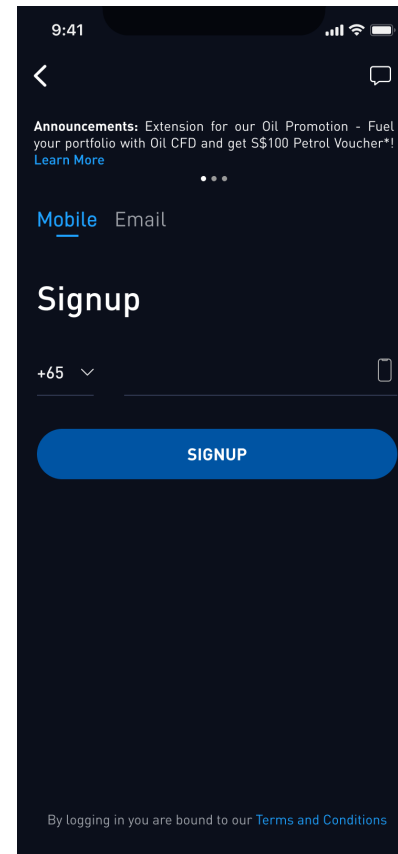
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New Users Registration

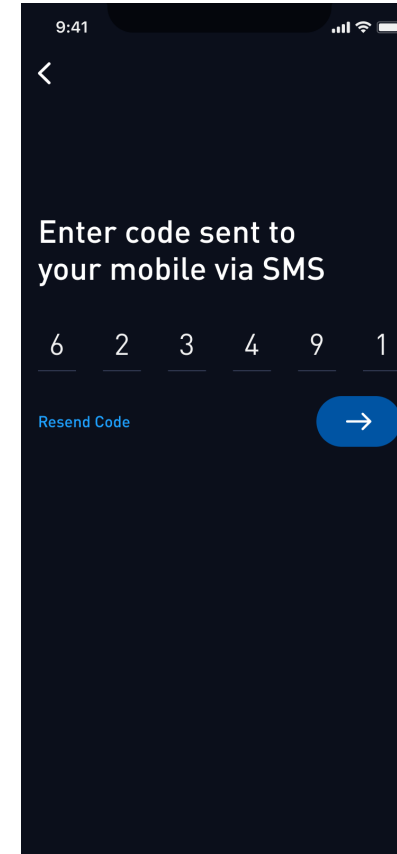
Mobile Number | Email Address | Password Reset | Open POEMS Account



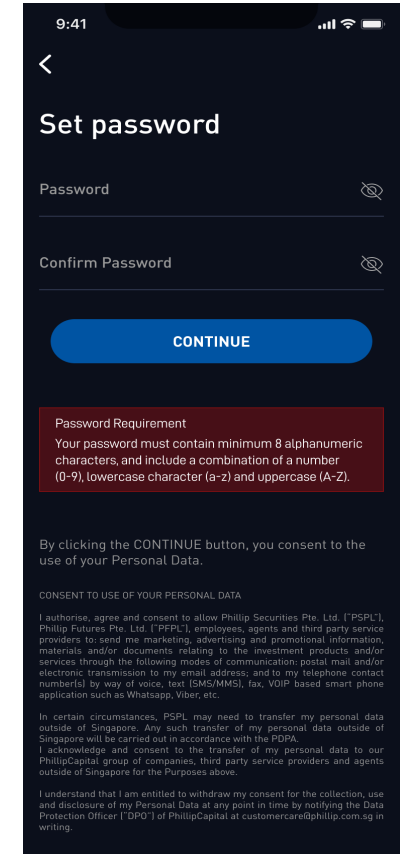
Step 1: Launch the POEMS Mobile 3 App and select the "SIGNUP" button



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



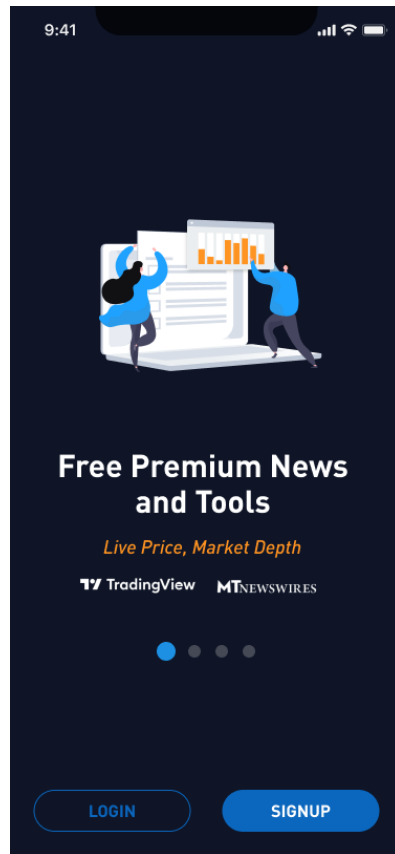
Step 3: Enter the code sent to your mobile via SMS for verification



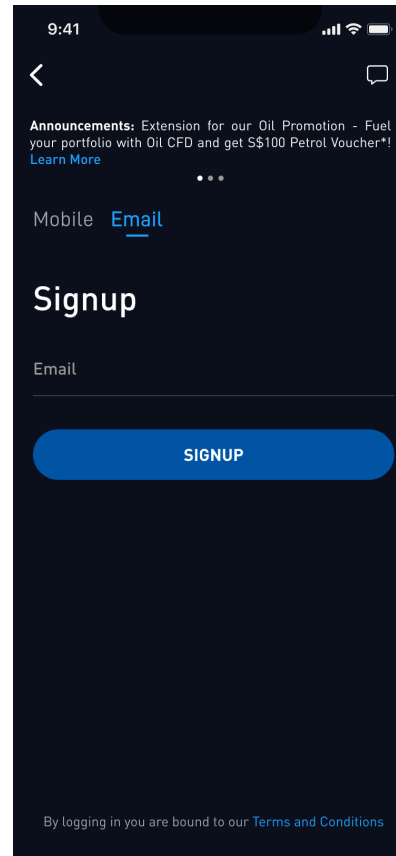
Step 4: Set your password to register

New Users Registration

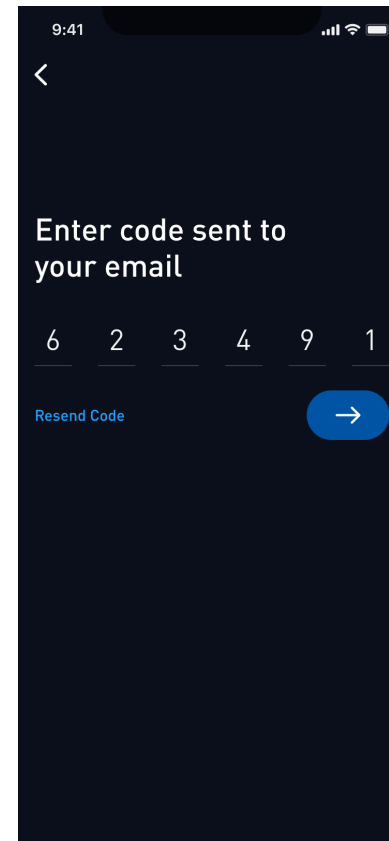
Mobile Number | **Email Address** | Password Reset | Open POEMS Account



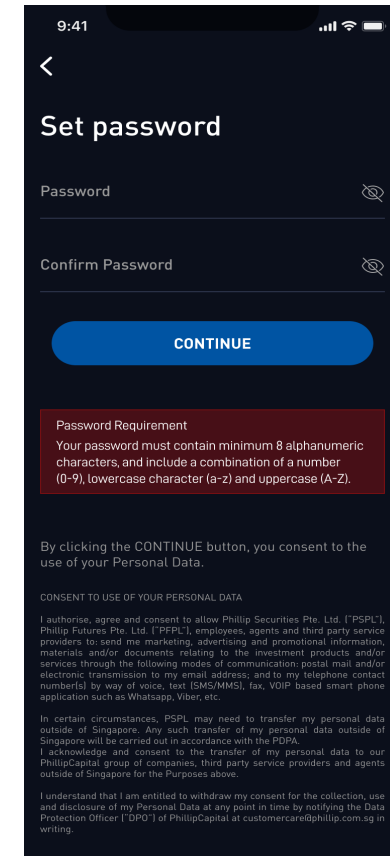
Step 1: Launch the POEMS Mobile 3 App and select the "SIGNUP" button



Step 2: Enter your Email Address



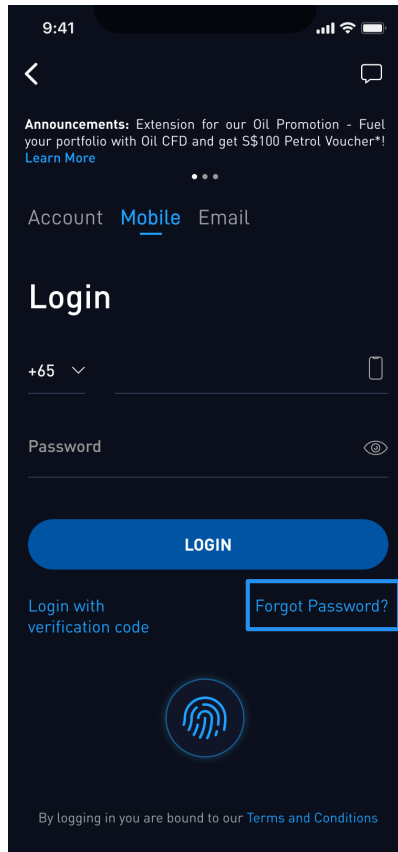
Step 3: Enter the code sent to your email address for verification



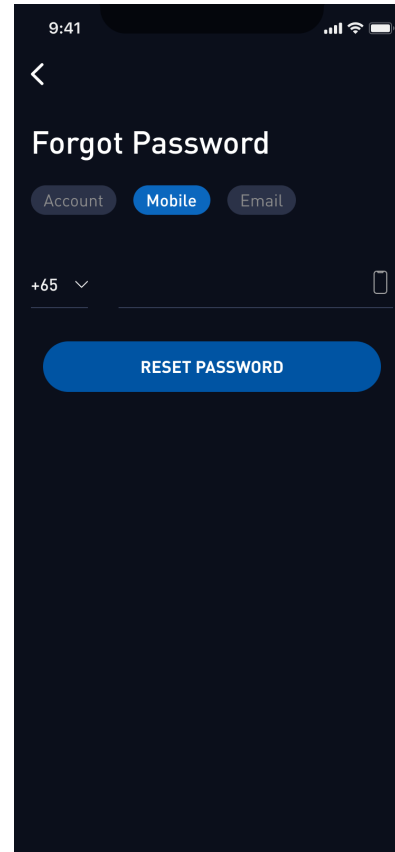
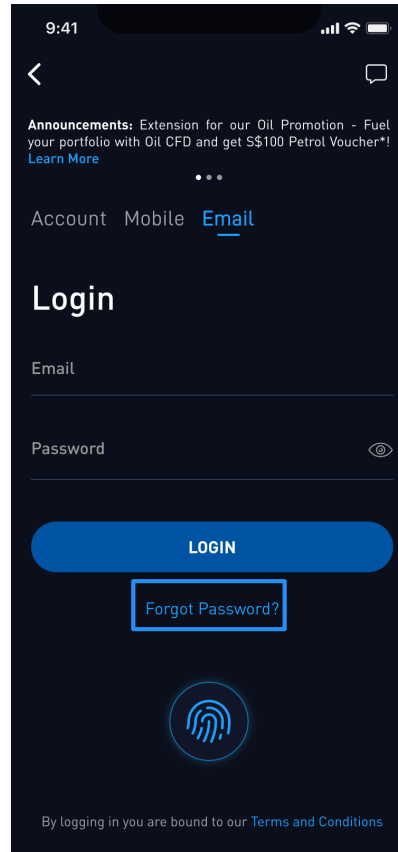
Step 4: Set your password to register

New Users Registration

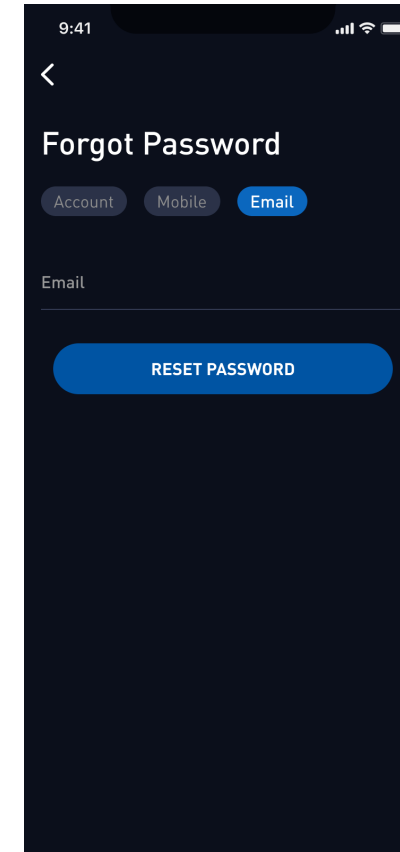
Mobile Number | Email Address | **Password Reset** | Open POEMS Account



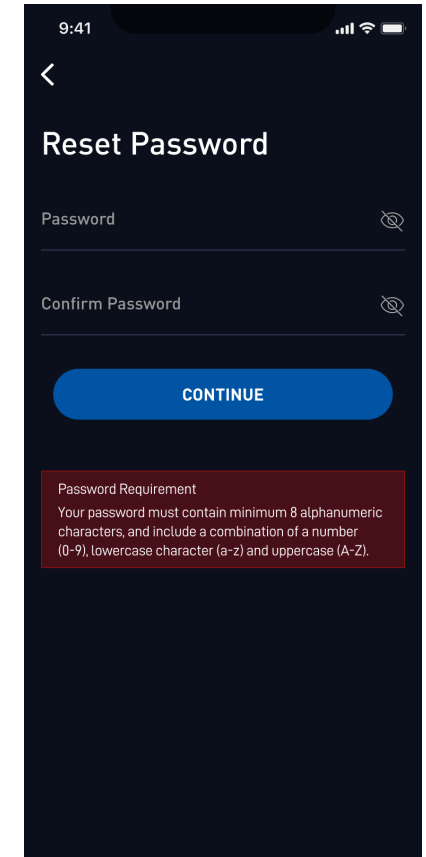
Step 1: Launch the POEMS Mobile 3 App and select the “Forgot Password”



Step 2: Enter your Mobile Number



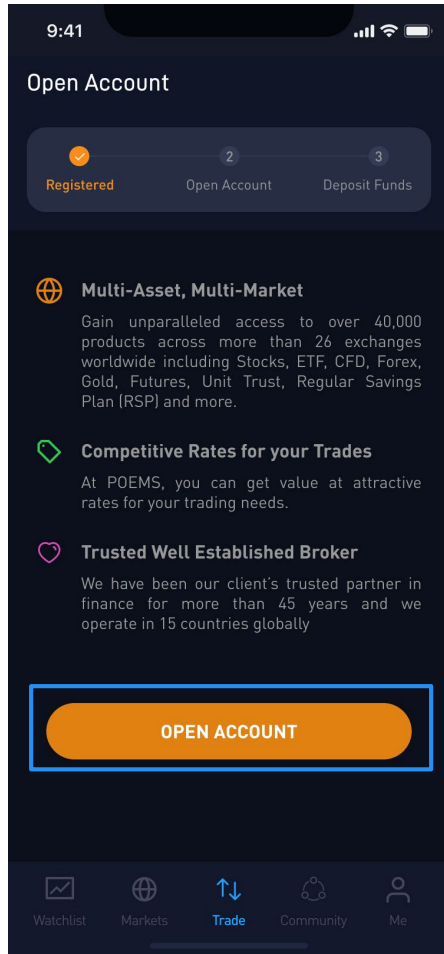
Step 2: Enter your Email Address



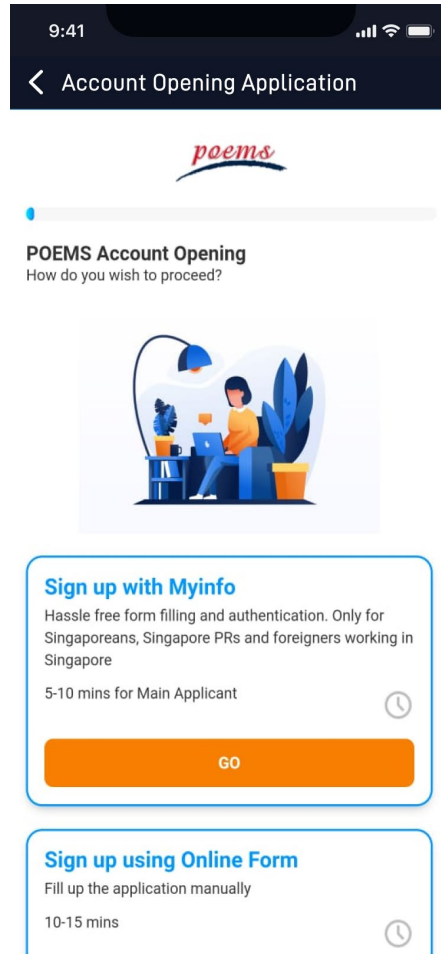
Step 3: Enter the new password and click Continue

New Users Registration

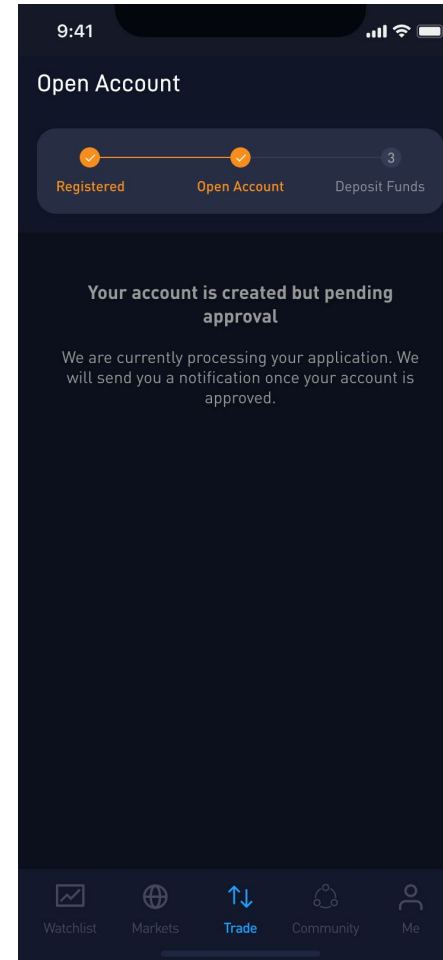
Mobile Number | Email Address | Password Reset | **Open POEMS Account**



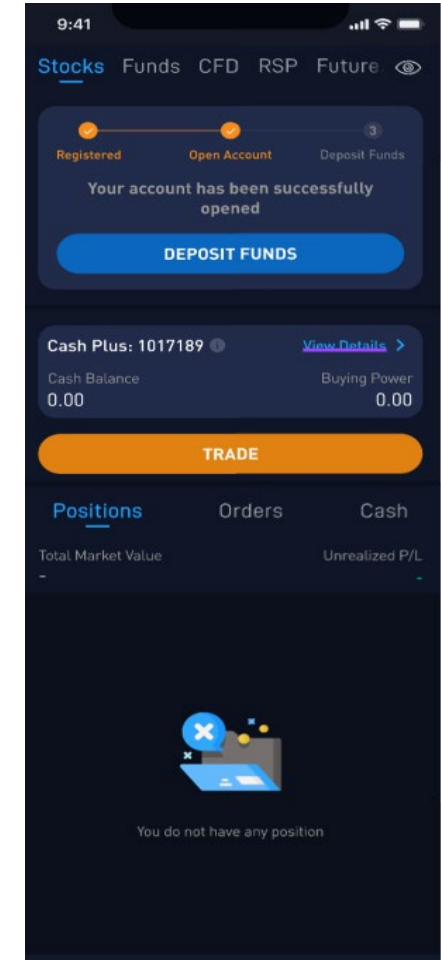
Step 1: Head to the “Trade” tab and select Open Account button.



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.

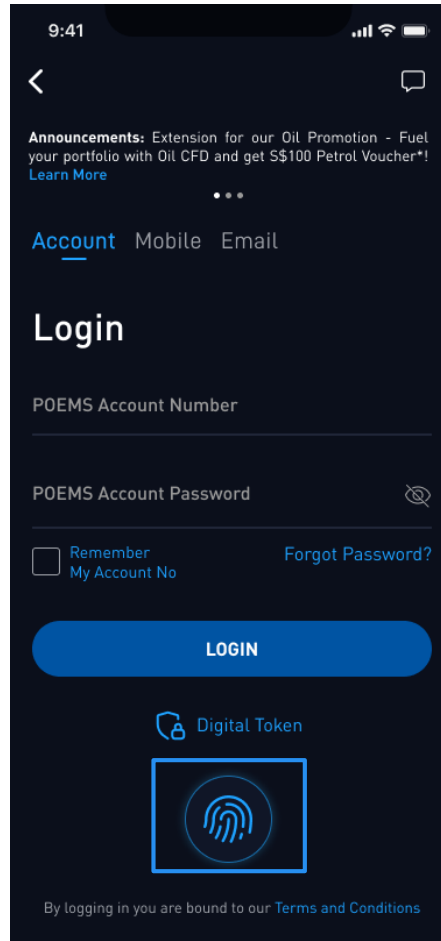


Step 4: Upon successful Account opening, you can deposit your funds into your Account.

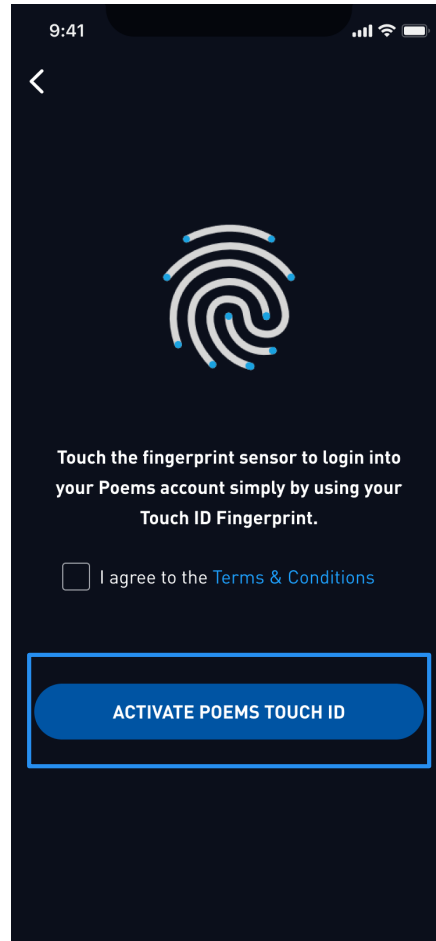
Getting Started

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

Touch ID

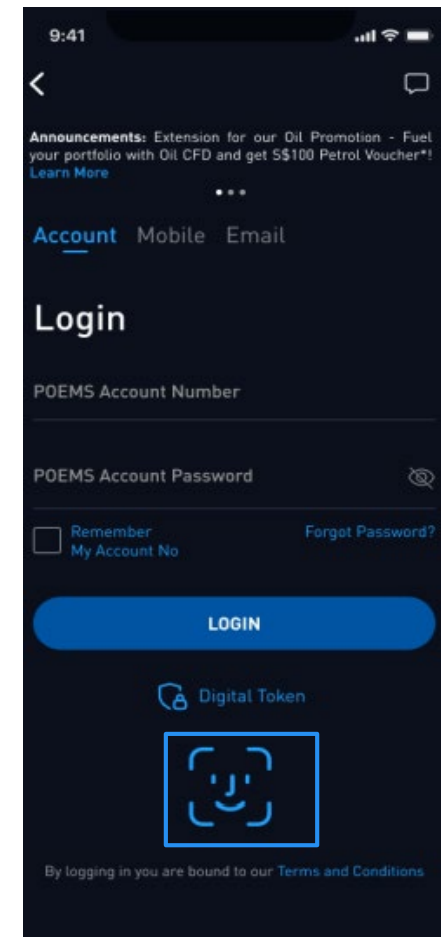


Step 1: Launch the POEMS Mobile 3 App and select the fingerprint

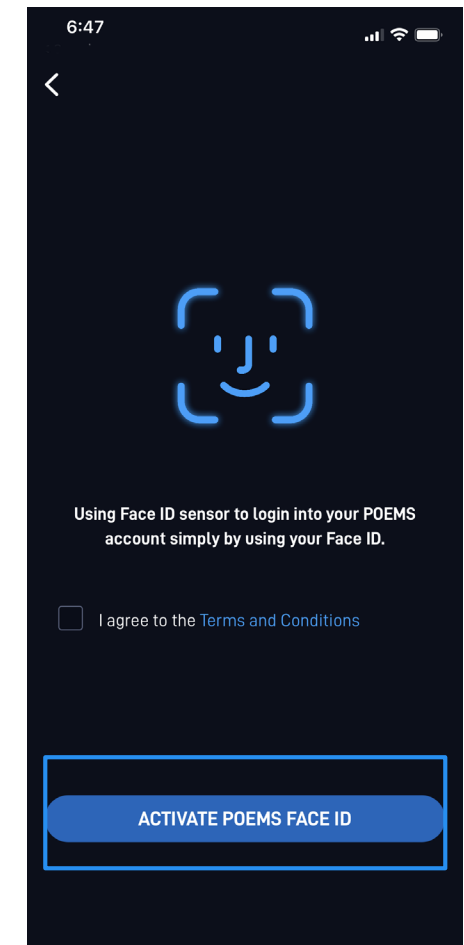


Step 2: Tick the Terms & Conditions and select activate POEMS Touch ID

Face ID



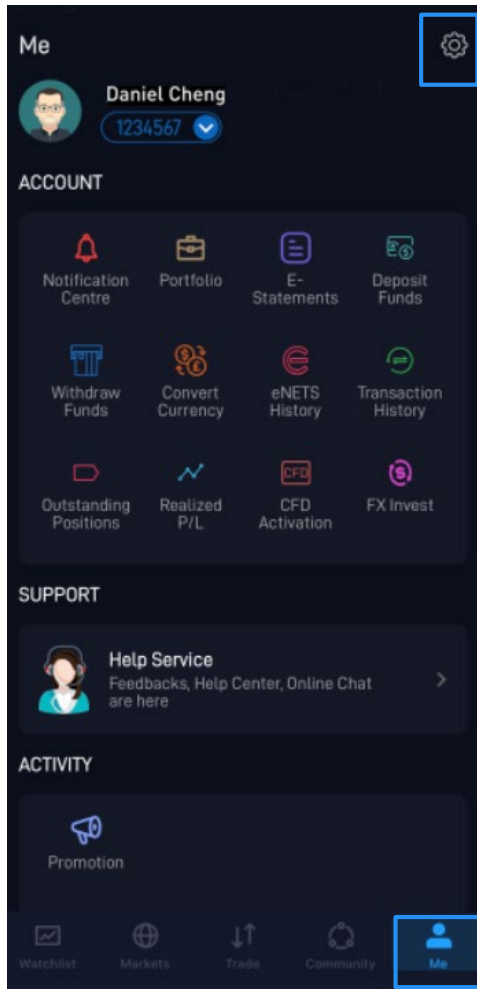
Step 1: Launch the POEMS Mobile 3 App and select the face icon



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

Getting Started

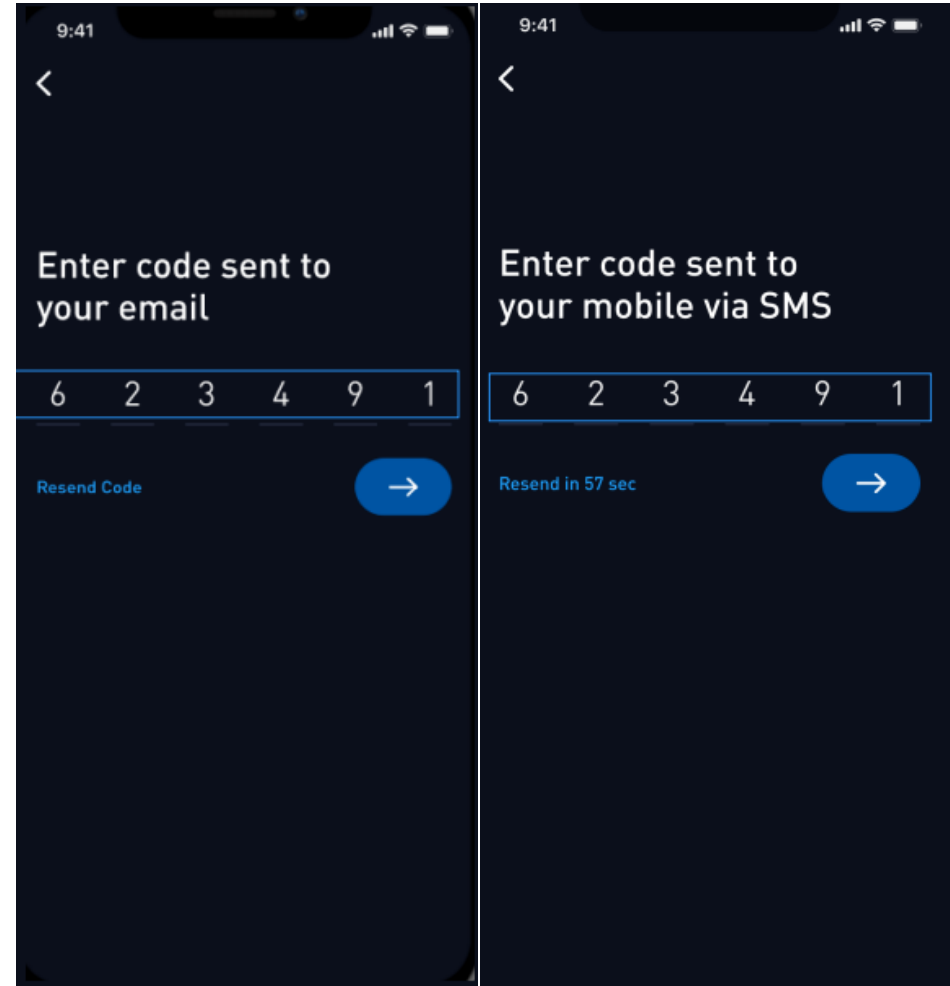
Touch ID/Face ID | **POEMS Digital Token** | One-Time Pin (OTP) using POEMS Digital Token | Scenarios for setting up 2FA on different Mobile Apps | Switch Accounts



Step 1: Go to “Me” tab > select Settings



Step 2: Select “Digital Token” > select ‘Active Token’.

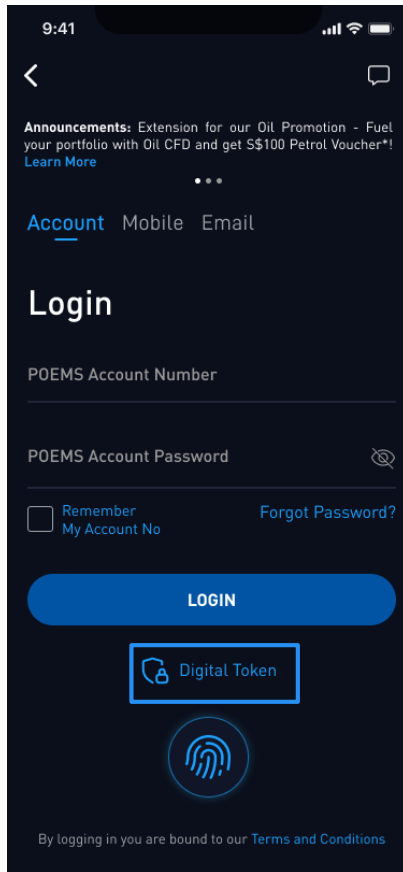


Step 3: Enter the activation code that will be sent to you via Email or SMS.

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

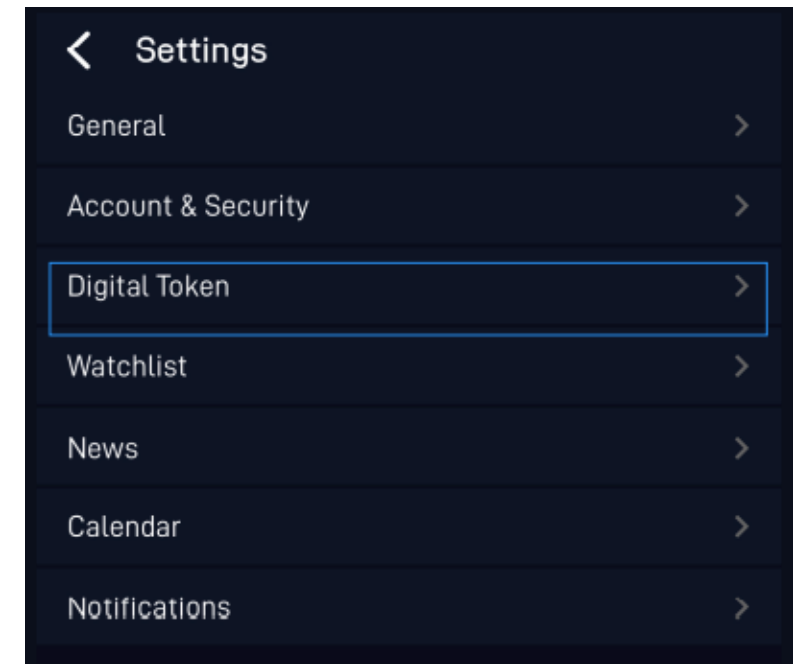
Method 1:



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

OR

Method 2:



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

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

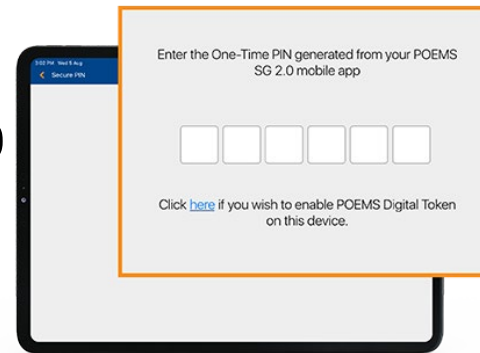
POEMS 2.0



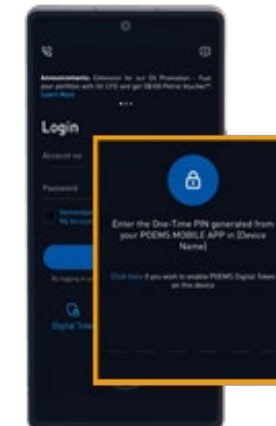
POEMS Pro



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

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

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.



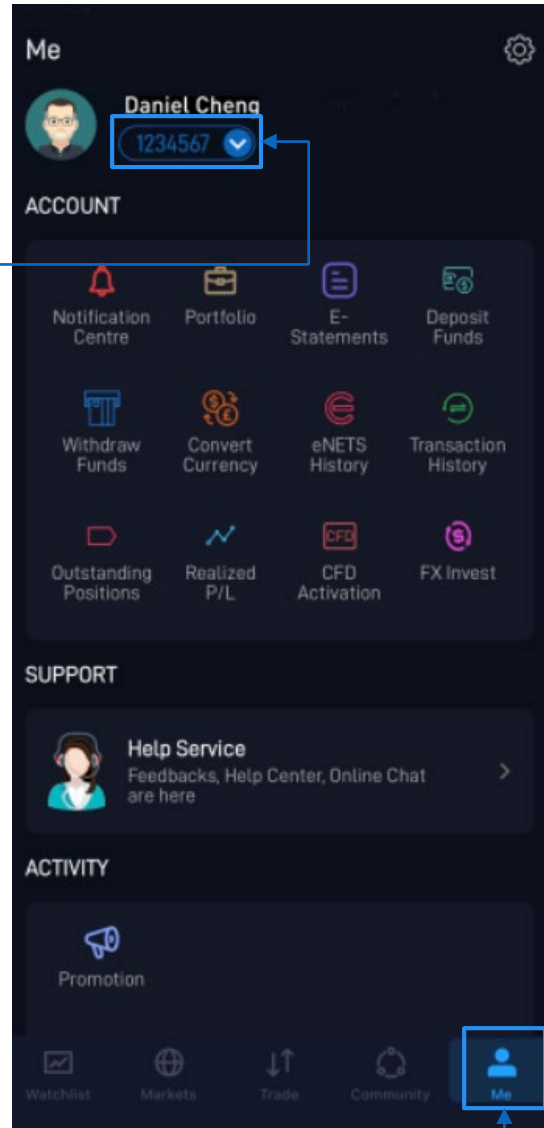
3) What if I have only downloaded both POEMS Mobile 3 App & POEMS Mobile 2.0 App?

- 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.



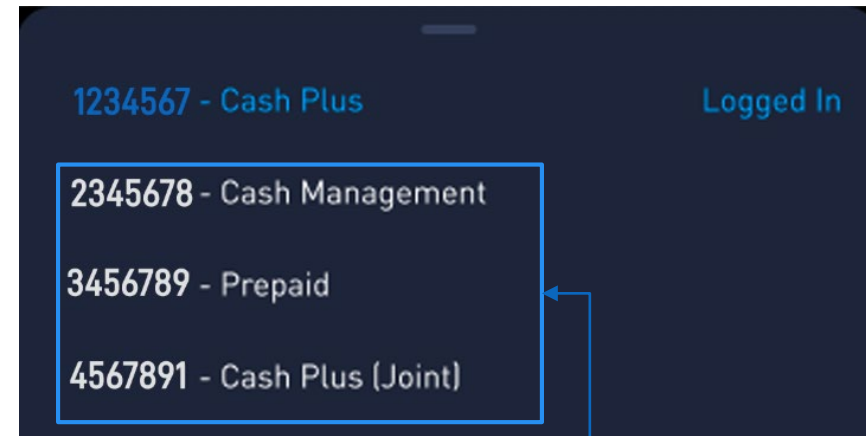
Getting Started

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**



Step 2: Select the drop-down menu on the account no.

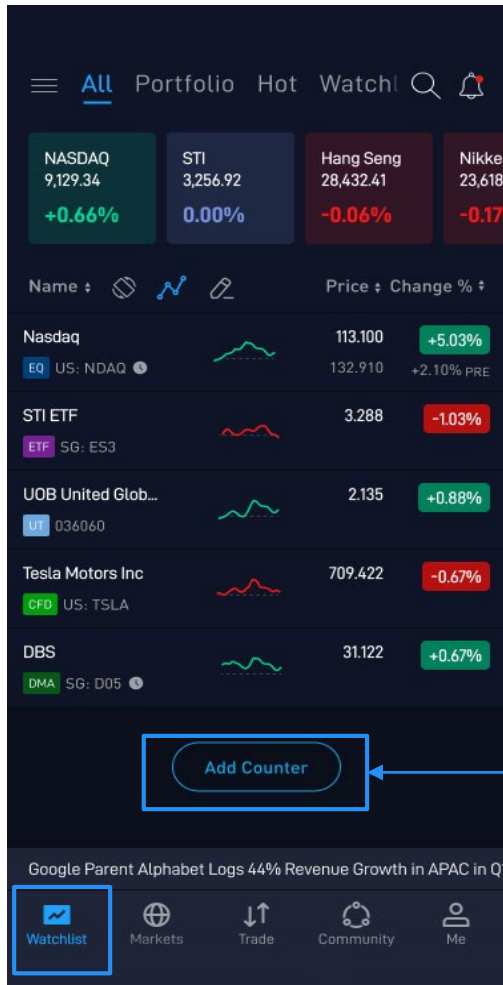
Step 1: Select 'Me' on the shortcut bar



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

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

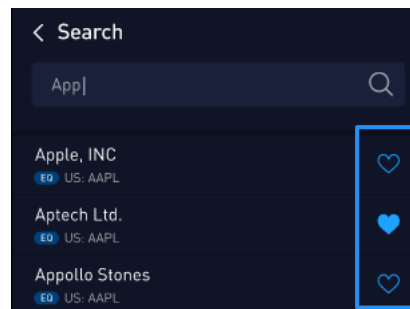


Method 1:

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).

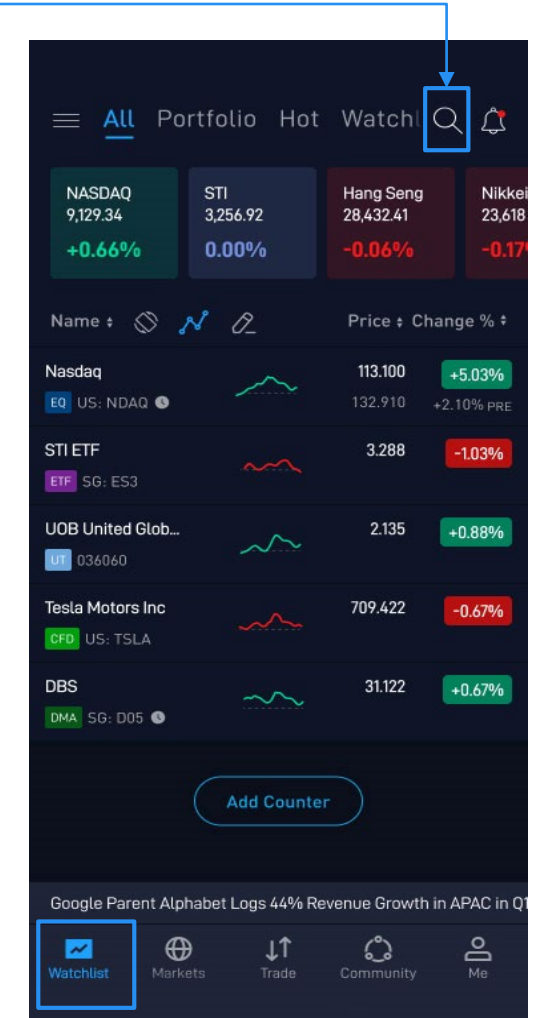
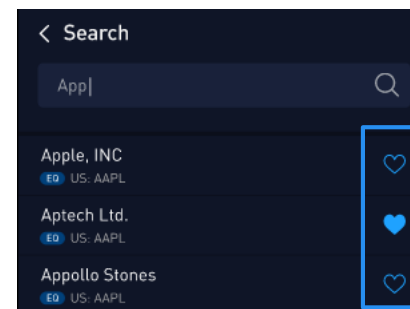


Method 2:

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).

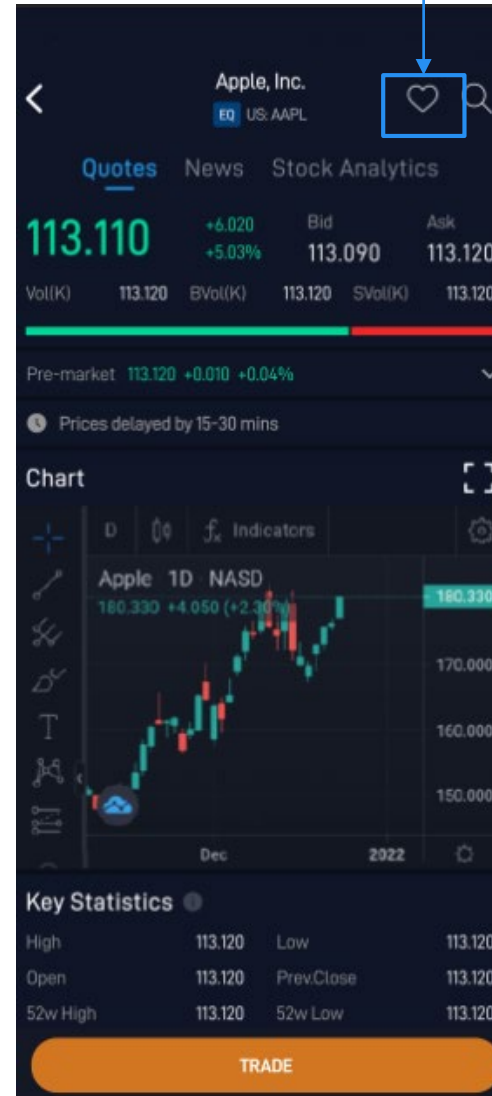


Navigation

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 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

The main screen displays account information: Cash Plus: 1234567, Cash Balance: 700,000.00, and Buying Power: 700,000.00. Below this is a 'TRADE' button. The 'Positions' tab is selected, showing 'Intraday' and 'Holdings' sub-tabs. The 'Holdings' sub-tab is active, displaying a table of positions:

Name	Quantity	Market Value	Last Price	Avg. Price	Unrealized P/L
Apple, Inc.	10	1,131.00	113.100	101.100	+120.00
ASIAN PAY TELEVISION TRUST	63	8.316	0.575	0.555	-26.703
BIUND CENTER INVESTMENT LTD	13,089	6,544.5	0.775	0.763	-3,443.385
ARA LOGOS LOGISTICS TRUST	0		0.835		0

The 'Position Details' modal for Apple, Inc. (EQ US: AAPL) shows the following data:

Unrealised P/L	Quantity on Hand (a)	Unsettled Purchases (b)
+120.00	1,131.000	0
Unsettled Sales (c)	Total Quantity (a+b+c)	Market Value
0	1,131.000	113.100
Average Cost Price	Traded Currency	
113.050	USD	

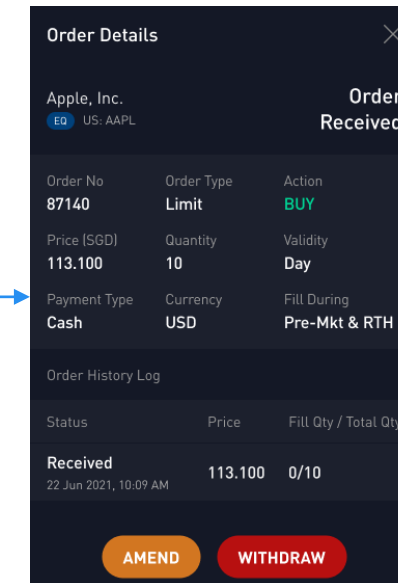
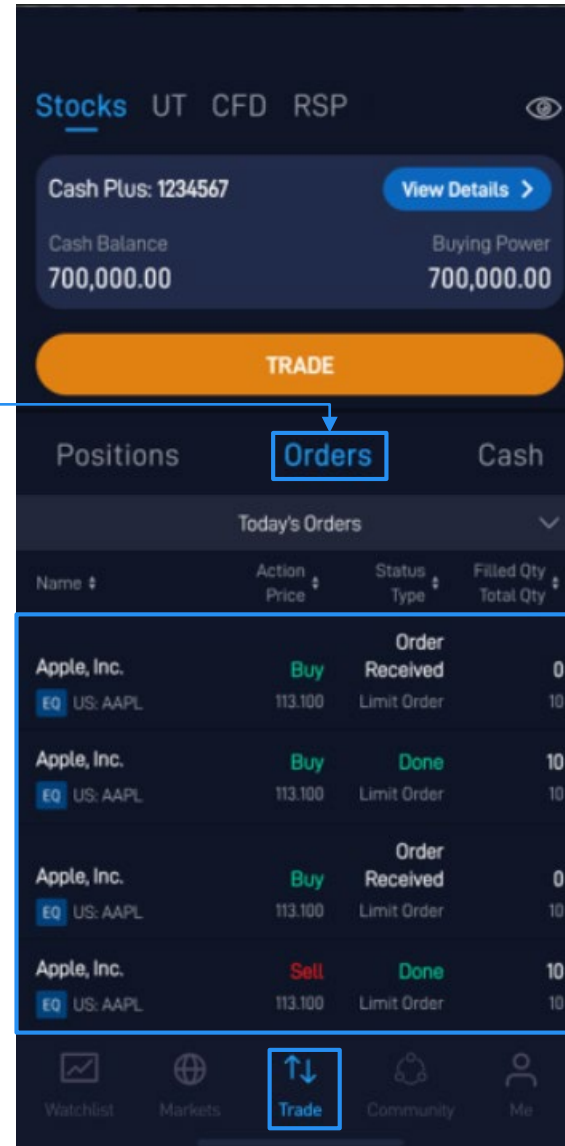
At the bottom of the modal are 'BUY' and 'SELL' buttons.

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 'Orders'



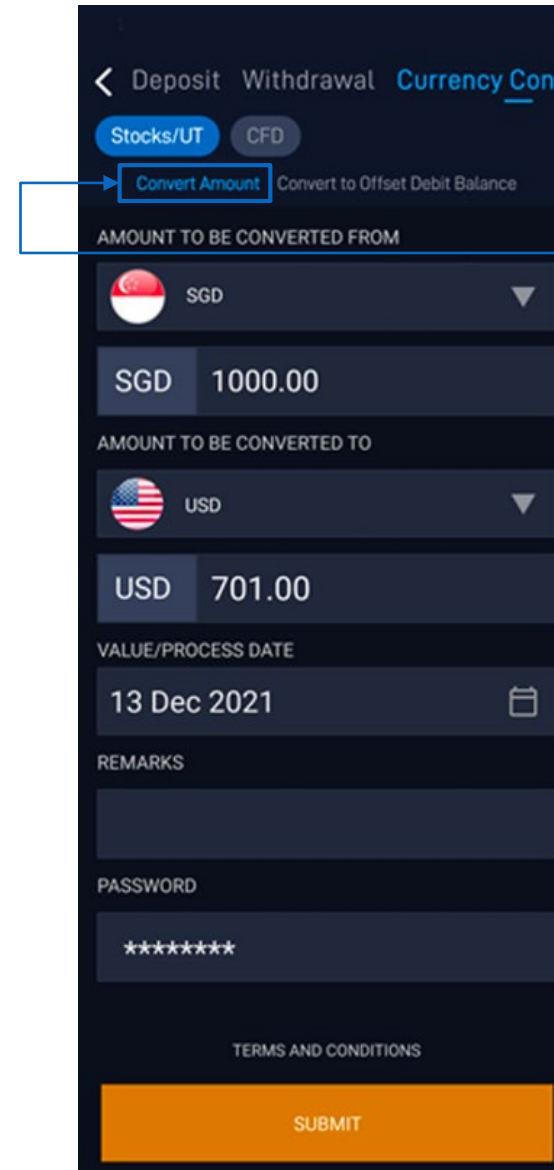
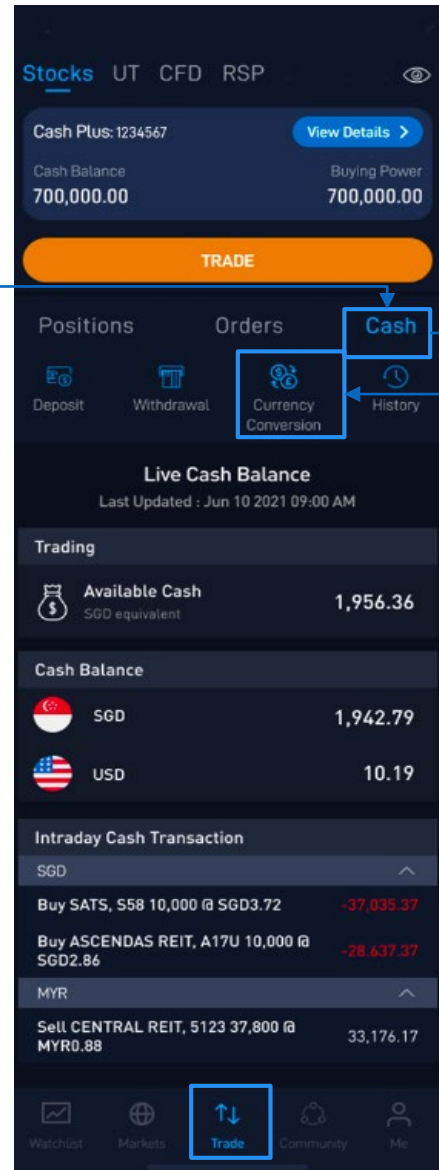
To view more details, simply tap on the order

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 2: Select 'Cash' > 'Currency Conversion'

Step 1: Select 'Trade' on the shortcut bar



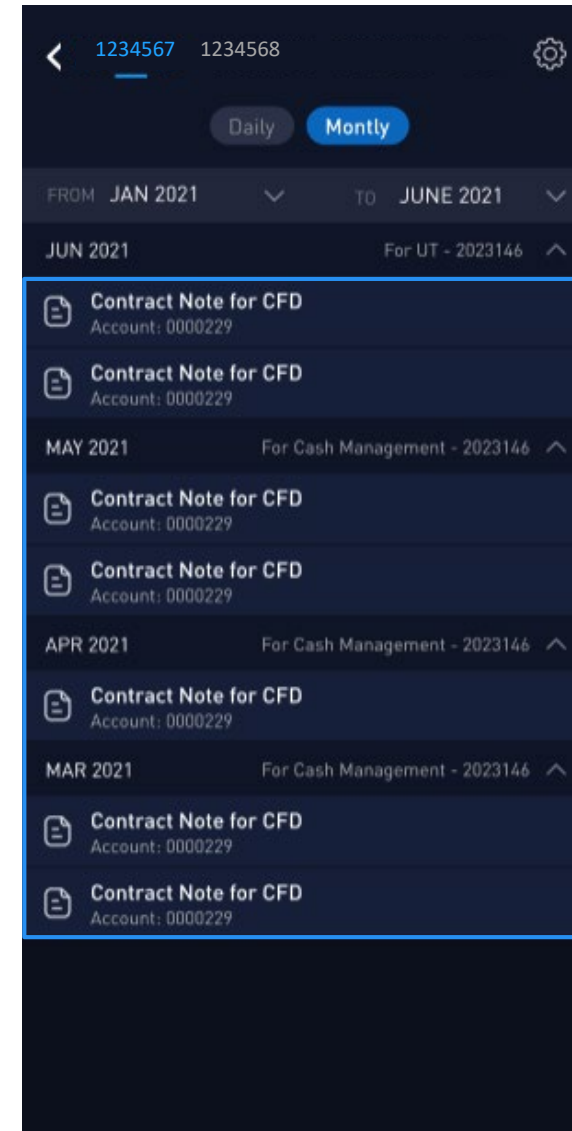
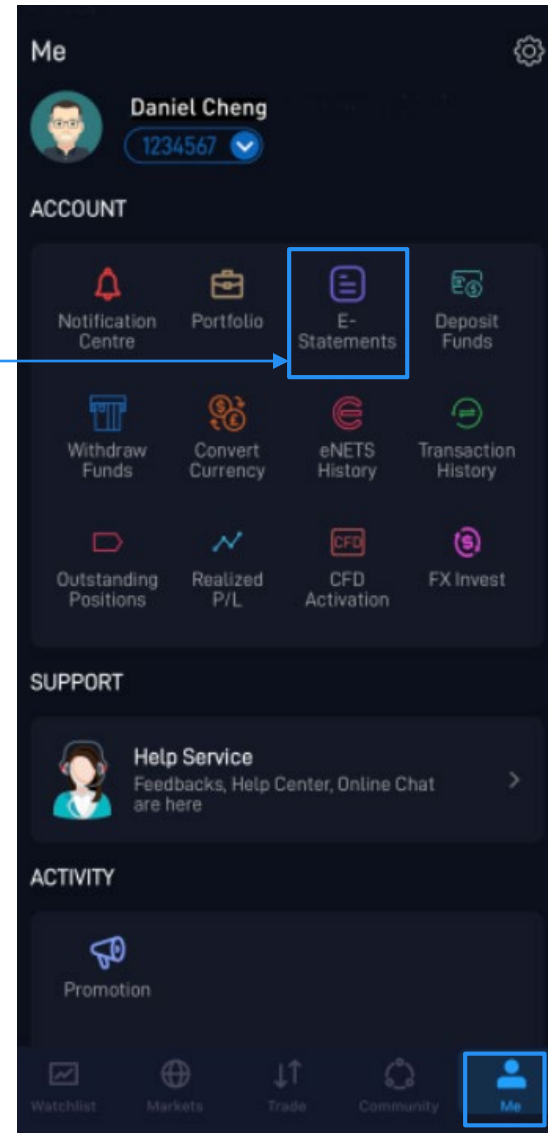
Step 3: Select 'Convert Amount' and key in the amount that you want to convert

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 'Me' on the shortcut bar

Step 2: Select 'E-Statements'



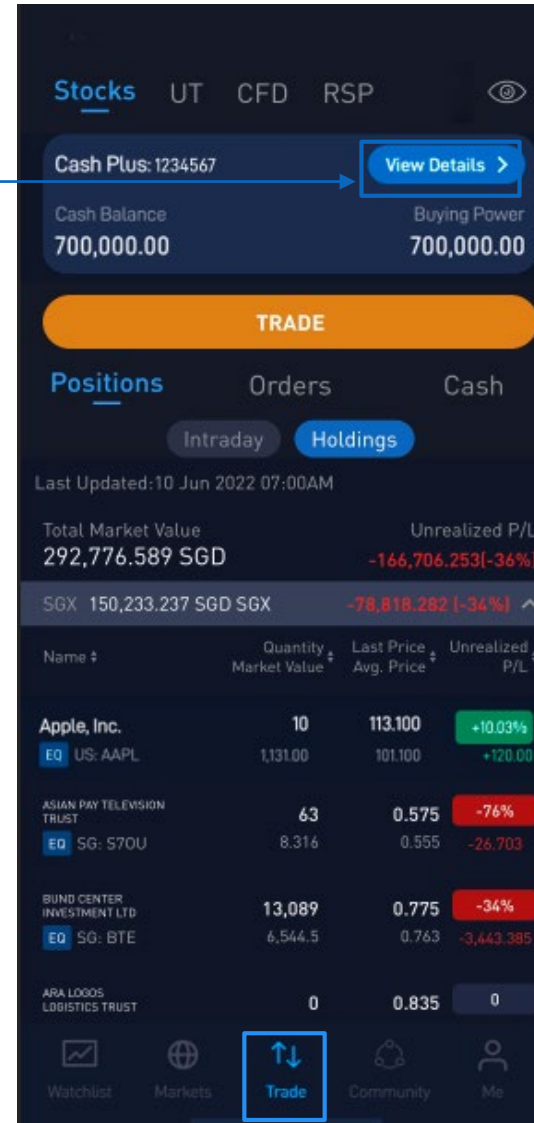
Step 3: Select the statement you wish to view or download

Navigation

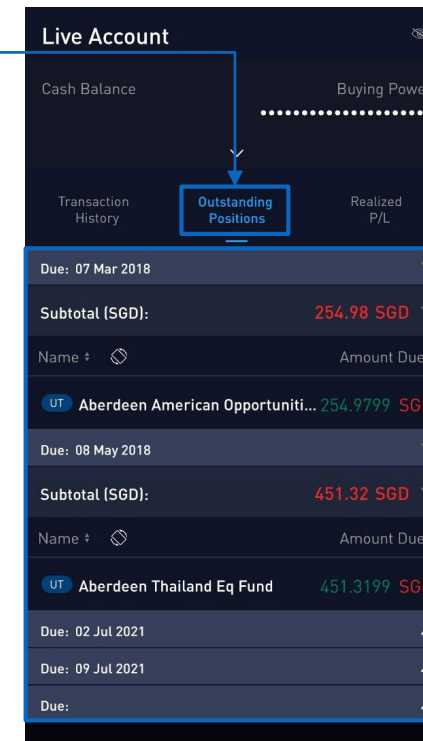
Add Counters to Watchlist | View Positions | View Order Status | Currency Conversion | View/Download E-Statement(s) | **View Outstanding Position(s)** | Set Price Notification(s) | Change Background Theme

Step 1: Select 'Trade' on the shortcut bar

Step 2: Select 'View Details'



Step 3: Select 'Outstanding Positions'



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

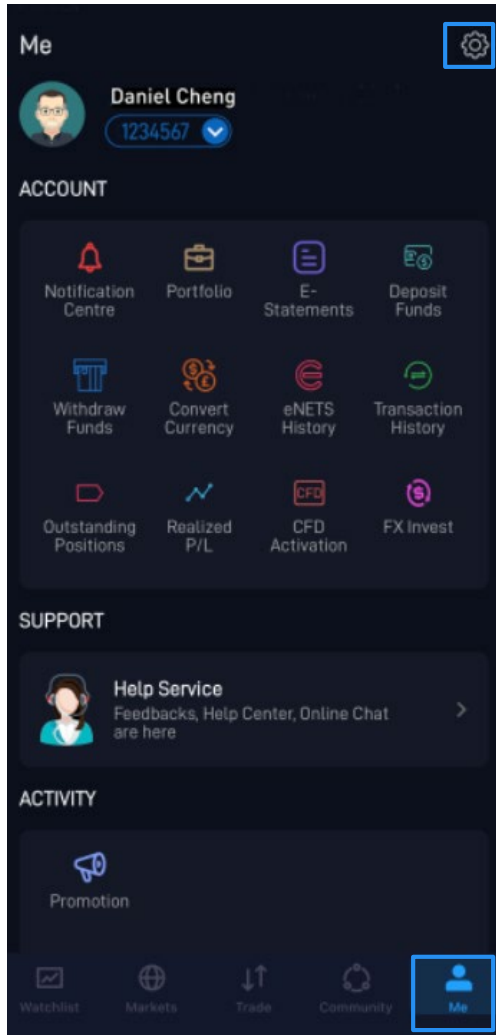


Step 2: Key in the relevant information and tap 'CREATE' at the bottom

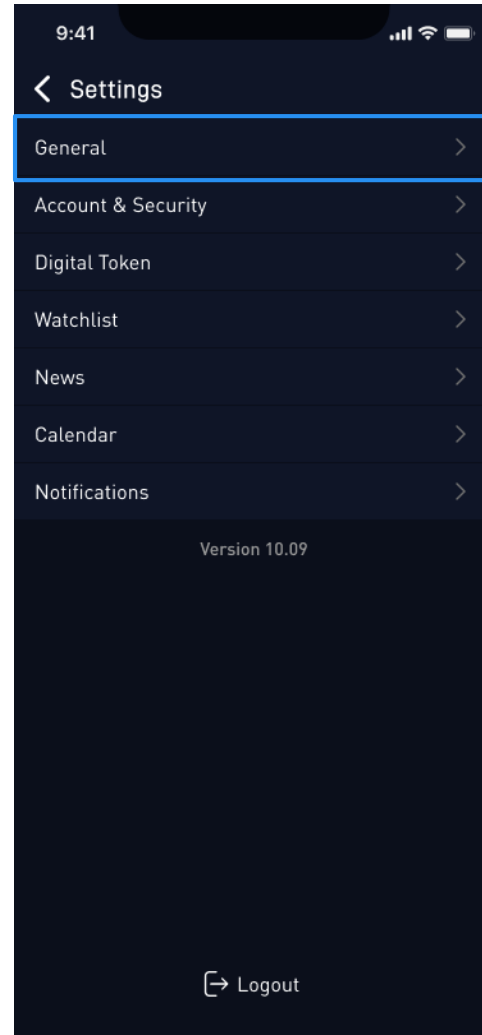
The 'Set Alert' page for Apple, Inc. (AAPL) allows users to set price alerts. The 'Price Target' section shows 'ABOVE 120' and 'BELOW 108' with toggle switches. The 'Change % Target' section shows 'ABOVE 10%' with a toggle switch. A blue arrow points from the 'CREATE' button back to the 'Set Price Alert' section of the counter details page.

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: Head to Me Tab and select Settings



Step 2: Select General



Step 3: Select Theme



Step 4: Select the theme colour that you desired.

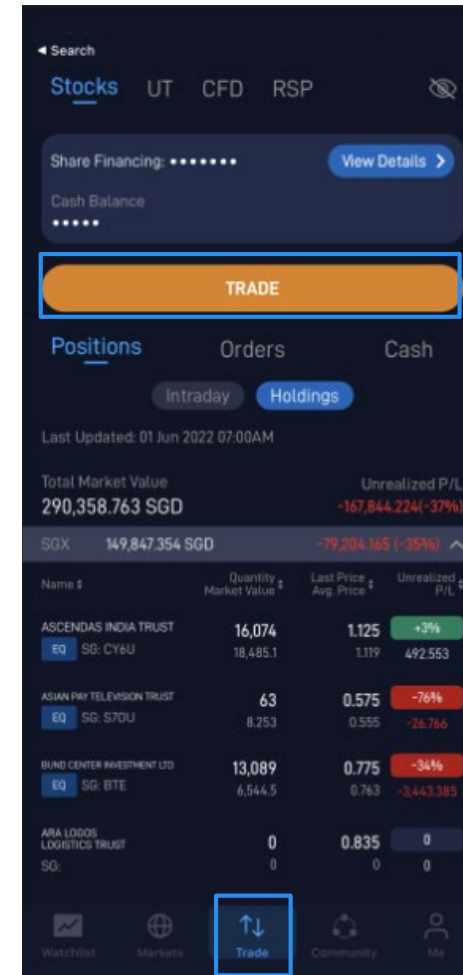
Trade

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



Method 1:

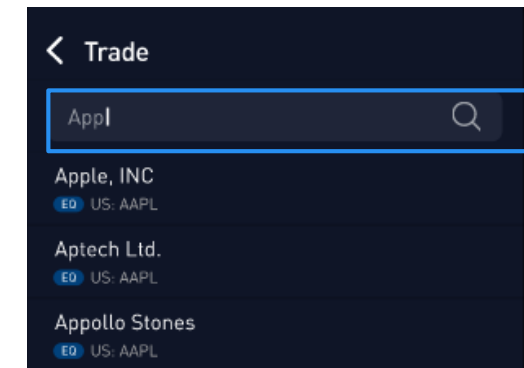
Step 1: In the counter details page, tap on 'TRADE' to open a trade ticket



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'

The screenshot shows the trade ticket for Apple, Inc. (AAPL) with the current price at 113.110. The order type is set to 'Limit'. The 'BUY' button is highlighted. The order entry fields are as follows:

Field	Value
Limit Price (USD)	0.00
Quantity (Lot Size: 100)	0
Payment Type	Cash
Settlement Currency	SGD
Fill During	Regular Trading Hours
Validity	Day
Cash Balance	1,000.00 SGD
Max Purchase	3,500.00 USD
Sell Limit	20,000.00 SGD
GROSS VALUE	0.00 USD

At the bottom, the 'PLACE BUY LIMIT ORDER' button is highlighted.

Swipe left and right to see the available order types

The screenshot shows the 'Order Confirmation' window for the Apple, Inc. trade. The order details are as follows:

Field	Value
Price (SGD)	113.100
Quantity	10
Order Type	Limit
Payment Type	Cash
Settlement CCY	USD
Validity	Day
Fill During	Regular Trading Hours
Gross Value	1,131.00 USD

The 'CONFIRM' button is highlighted at the bottom.

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

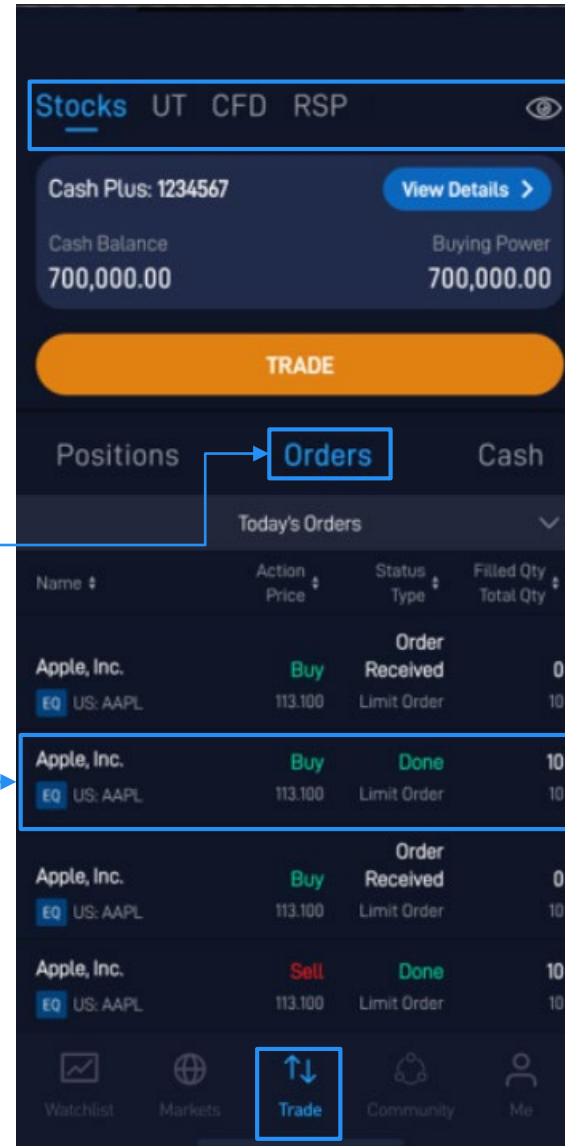
Trade

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

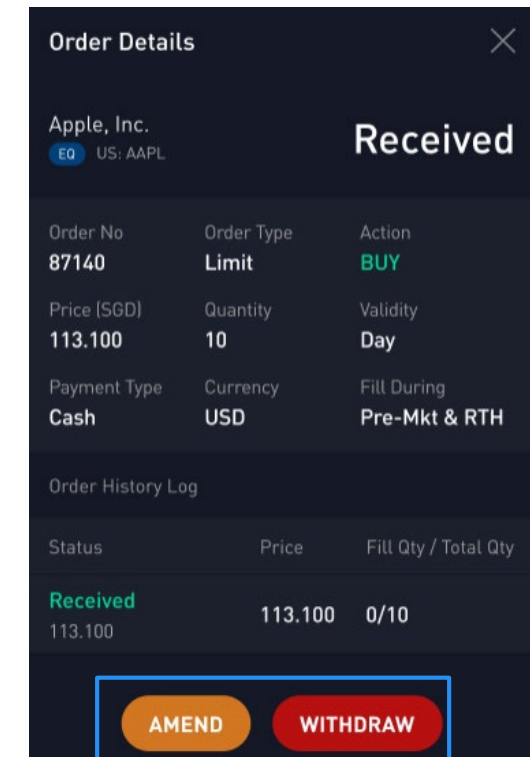
Step 1: Select 'Trade' on the shortcut bar

Step 2: Select 'Orders'

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



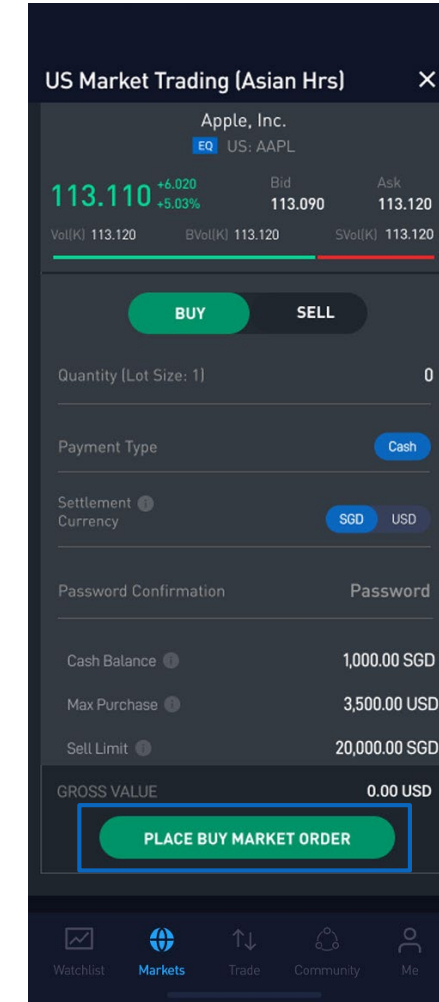
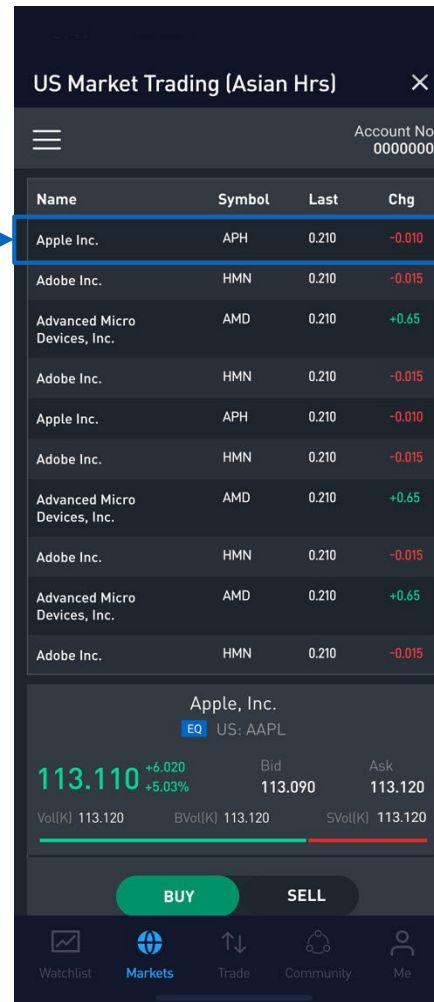
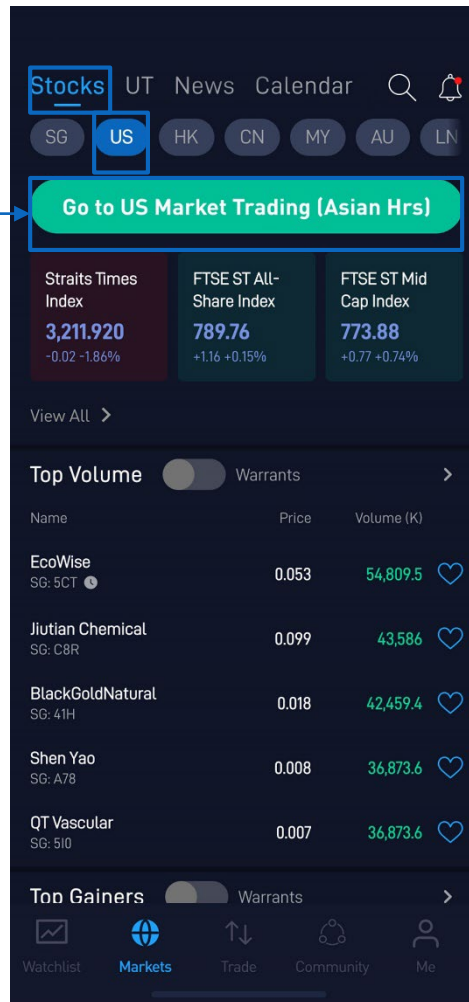
Swipe left and right and select the asset type to view the respective positions



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)"

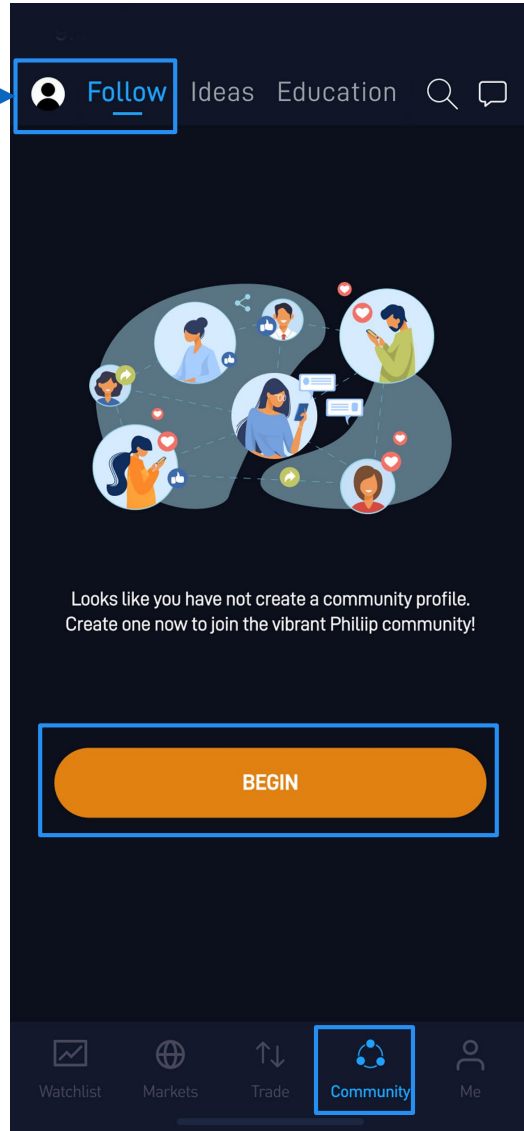
Step 2: Select the desired counter

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

Community

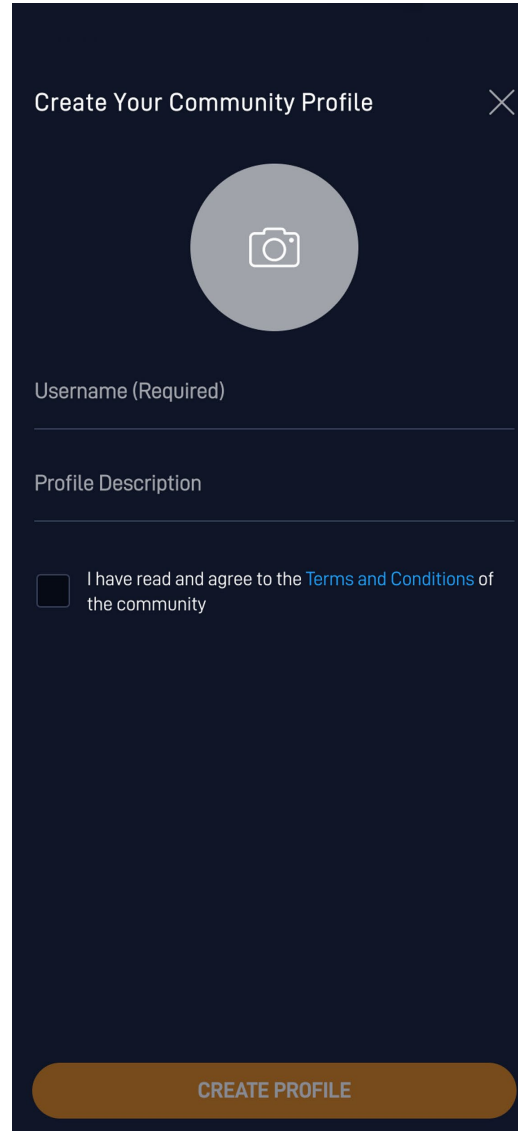
Create a Profile | Join the interest group(s) | Ideas | Education

Step 2: Select 'Follow' Tab > Select "Begin"



Step 1: Select 'Community' on the shortcut bar

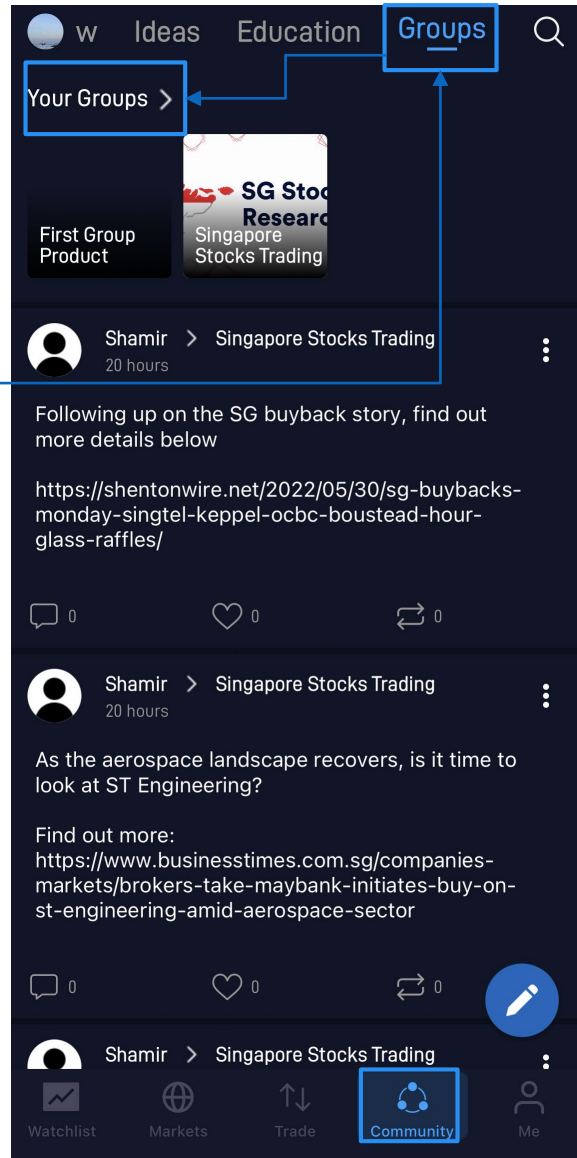
Step 3: Enter your username, bio on the profile description, upload your picture, and tick the T&Cs > Select "Create Profile"



Community

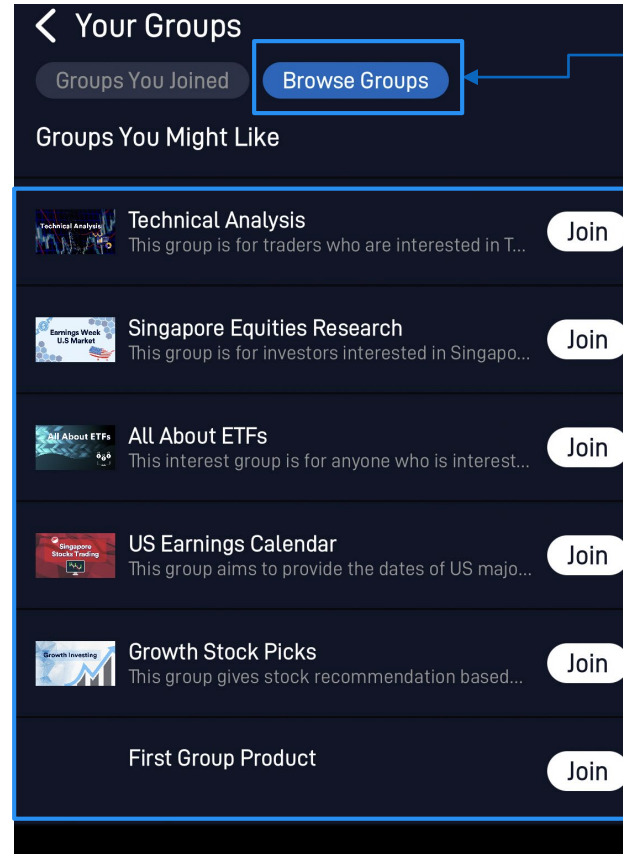
Create a Profile | Join the interest group(s) | Ideas | Education

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



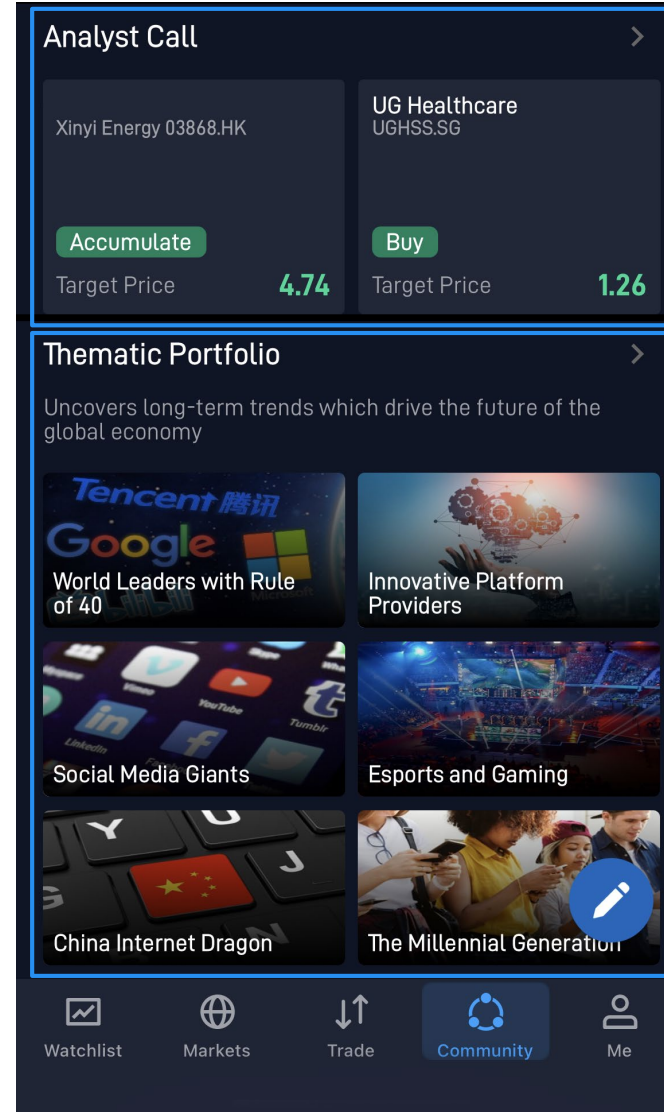
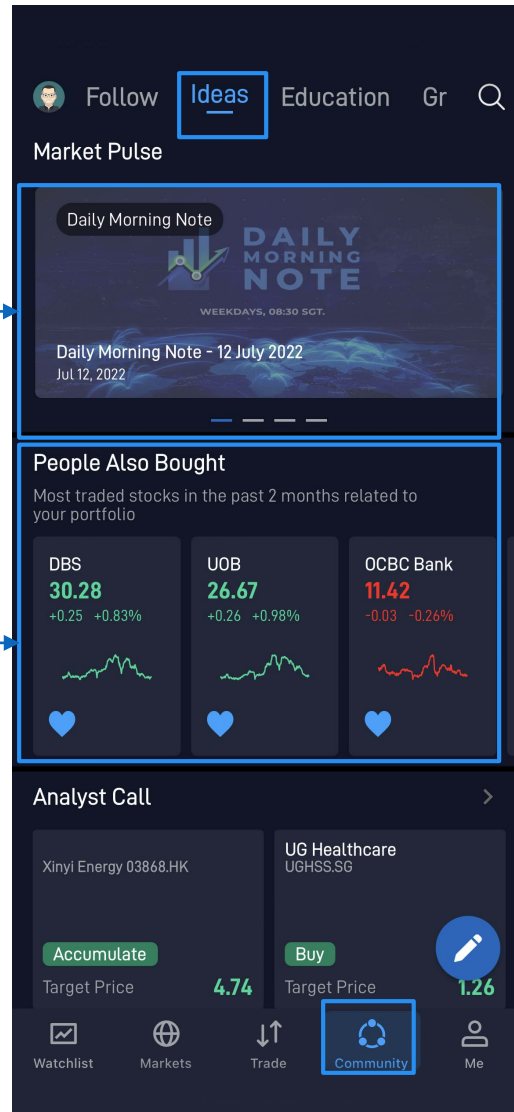
Community

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

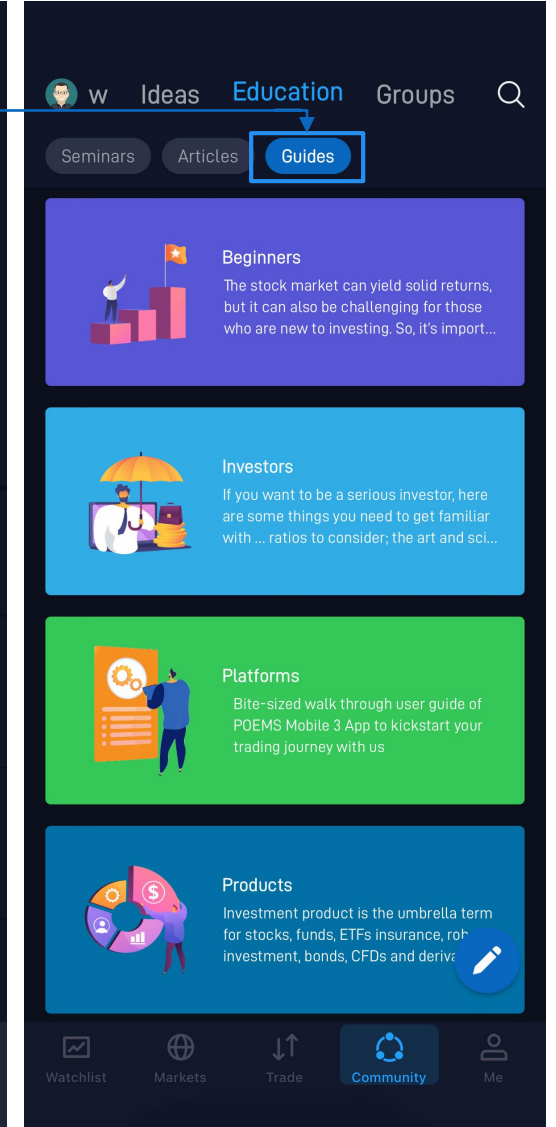
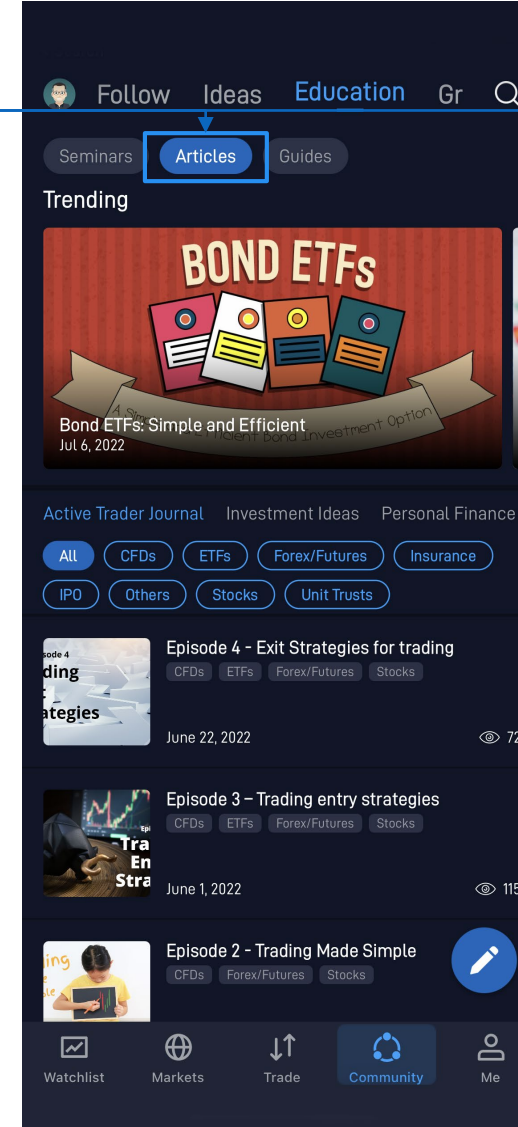
Create a Profile | Join the interest group(s) | Ideas | Education

Step 2: Head to “Education”
tab > “Seminars” to sign up for
free seminars/webinars

Step 1: Select ‘Community’
on the shortcut bar



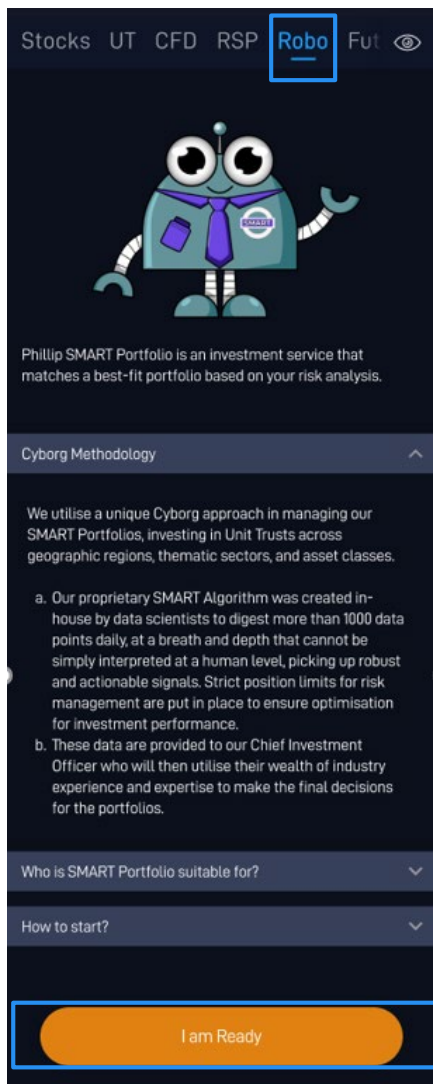
Step 3: Head to
“Articles” and
“Guides”
sections to read
our investment
articles/guides
that covers
trending topics
based on the
market



SMART Portfolio (Robo)

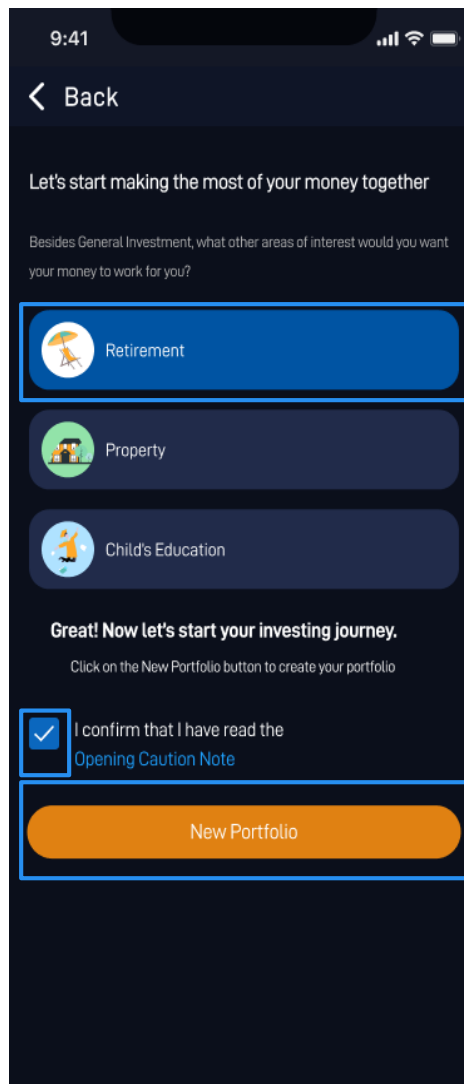
Open a SMART Portfolio (Robo) Account | Deposit funds on SMART Portfolio (Robo) Account

Step 1: Select 'Robo' on the top tab.



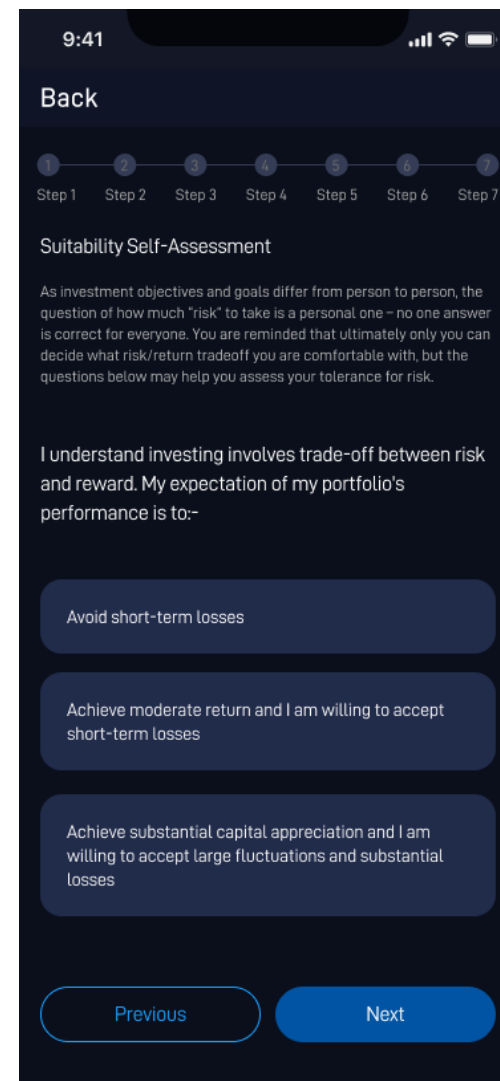
Step 2: Select 'I am Ready' button to explore.

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 | Deposit funds on SMART Portfolio (Robo) Account

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

Start Account Setup

Before you proceed, please prepare the following for a smoother experience.

Choose your account type Provide your info

Choose your Account Type

Choose your account info type just few steps away.

SMART Portfolio - by Cash

SMART Portfolio - by SRS

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

Start Account Setup

Before you proceed, please prepare the following for a smoother experience.

Choose your account type Provide your info

Choose your Account Type

Choose your account info type just few steps away.

Sign up With singpass

Sign up Using Online Form

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

9:41

Stocks UT CFD RSP Robo

1234567 2368765 1248962 1284564

Submitted Ready for Deposit

Thank you for your account opening. An email will be sent to you once your account is approved. In the meantime, fund your account now to start investing once your account is ready.

Deposit Funds

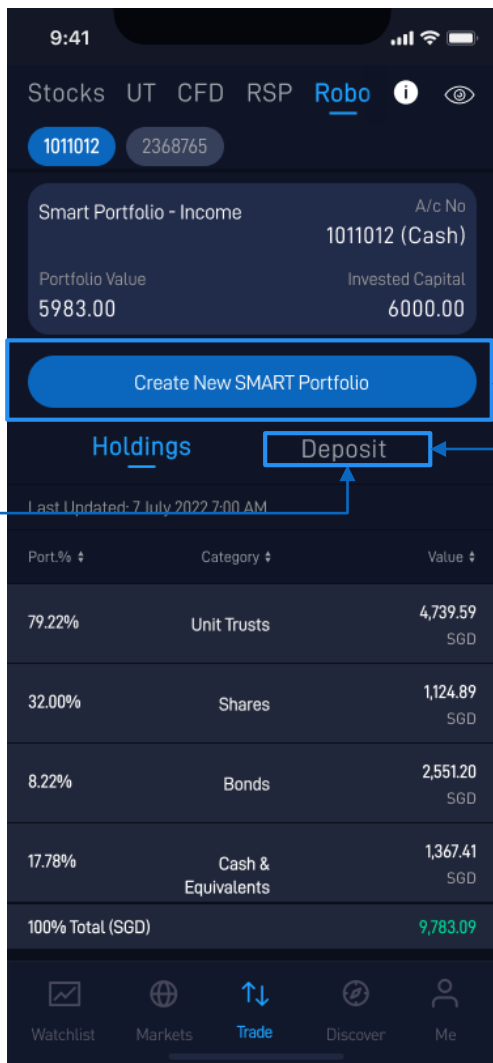
Create a SMART Portfolio Account

Watchlist Markets Trade Discover Me

SMART Portfolio (Robo)

Open a SMART Portfolio (Robo) Account | 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

