

Phillip's Online Electronic Mart System

POEMS 3.0 User Guide

2023-09-01



Content

1.	R	egistration	2
2.	L	ogin	1
3.	Fı	unctions	5
A	Α.	Trade	5
I	3.	Watchlist	1
(2.	Markets	5
Ι).	Community	7
F	Ξ.	Me	3
	ii.	Notification Centre	3
	iii	. Portfolio19)
	iv	Deposit)
	v.	Withdraw	2
	vi	. Fund Transfer	1
	vi	ii. eDDA	7
	ix	. eCoupon	1
	x.	Redeem	2
	xi	. Business	5
4.	Se	etting	7
A	A .	Language	7
I	3.	Link Account	3
(Change Password	9

輝 立 証 券 集 **Phillip Securities Group**



專



1) Click "SIGNUP".



4) Set your password and click "CONTINUE" to register.



2) Enter your mobile number and click "SIGNUP".



5) Enter your Phillip Account number and ID number to "LINK ACCOUNT".



3) Enter the SMS verification code.



6) Click "SET UP NOW" to set up Digital Token.



PLEASE READ AND UNDERSTAND THESE TERMS AND CONDITIONS BEFORE YOU REGISTER FOR MOBILE SECURITY KEY AUTHENTICATION FOR INVESTMENT SERVICES. IF YOU DO NOT ACCEPT THESE TERMS AND CONDITIONS, PLEASE DO NOT REGISTER FOR MOBILE SECURITY KEY AUTHENTICATION.

Definitions and Interpretation
 In these Terms and Conditions, the following words shall have the following meanings:
 "You" means the user of POEMS application;
 "App" means the POEMS application (as updated from time to time) which can be downloaded to any mobile device which runs an operating system supported by us;

"Mobile Security Key" means a feature within the App which is a software based Security Device used to generate a onetime Security Code, as Phillip may provide from time to time pursuant to these Terms and Conditions;

REJECT AGREE

 Read Terms and Condition for Digital Token and click "AGREE".



8) Digital Token has been activated successfully when "✓" appears.

	Ver. 2023
無SM卡 令 10:07 く	(4)
Setup	
Hello, let us know your preference. What markets are you interested?	
SKIP	
NEXT	

 Select the markets you are interested and click "NEXT". The registration is completed.



無SIM卡 🗢	10:30	
<		
Login		
+852 🗸		
Password		
		Ø
Conditions on	at I have read and agree to	the Terms &
	u Frivacy Folicy	
	LOGIN	
	LOGIN	
	LOGIN Forgot Password?	

1) Enter the Mobile No., Password, and click LOGIN. 2. Login

<		\square
Logi	n	
+852	~	
Password		Ŕ
Con	nfirmed that I have read and agree to the Ter ditions and Privacy Policy	ms &
	LOGIN	
	LOGIN Forgot Password?	
	LOGIN Forgot Password?	
	LOGIN Forgot Password?	
	LOCIN Forgot Password? Digital Token	
	LOGIN Forgot Password?	

2) Digital Token will be **verified** 3) The **main page** shows up automatically when logging in with the same device.



when login successfully.

* To reset your password, please click "Forgot Password".



1) Enter the Mobile No. and click RESET PASSWORD.



2) Enter the SMS Verification Code.

無SIM卡 夺	10:36	
<		
Verif	fy Identity	
Account N	umber	
ID No		
lf your Hk	(ID card number is E123456(7), please	
input E12		
	CONTINUE	

3) Enter the Account Number, **ID No and click CONTINUE** 輝 立 証 券 集 團 Phillip Securities Group



4) Enter the new Password,
 Confirm Password and click
 "CONTINUE".

the bound device.

 Password changed successful. You could use new password to login again.

* When logging in POEMS with another device, Digital Token need to be input manually or you may reset it on this device.



- 2) Generate the **6-digit security** code.
- Enter the 6-digit security code on the choosing device to access your account.



3. Functions

A. Trade

i. <u>Place Order</u>

無SIM卡 令 09:26	97% 💋	1) Click "TRADE".
Stocks Phillipmart	٢	
Cash:	View Details >	
Total Portfolio Value 86,156.05 Total Cash Balance 79,756.05	*HKD Based	
1 TRADE		
Positions Orders	Cash	
Live Intraday Total Market Value 6,400.00 HKD		
HK 6,400.000 HKD	^	
Name \$ Quantity Market Value \$	Last Price \$	
HK & China Gas 1,000 EQ HKEx: 0003 6,400.00	6.400	
⊡ ⊕ ↓↑ Watchlist Markets Trade Com	රී <u>දි</u> munity Me	
無SIM卡 令 18:06	1	2) Enter the Stock Code or Stock Name to search
< 5 2		stocks.
HSBC Holdings Plc 3	\heartsuit	 Select the required stock.
SHENZHEN FOUNTAIN CORPORATION (S EQ CN: 000005	т) 💟	(E.g. HSBC Holdings Plc HK:0005)
Hong Kong Ferry Holdings	\heartsuit	
Harbour Centre Development	\heartsuit	
Fairwood Holdings	\heartsuit	
Guoco Group EQ HK: 0053	\heartsuit	
Neway Group Holdings	\heartsuit	
Chen Hsong Holdings	\heartsuit	
Sunway International - Parallel	\heartsuit	
Skyfame Realty © HK: 0059	\heartsuit	
Frontier Services Group	\heartsuit	

P 輝 立 証 券 集 團 Phillip Securities Group	Ver 2022
Image: Simple Control of the second of t	 4) Market data. (Prices will be delayed by at least 15 minutes for non-Realtime Teletext user) 5) Technical Analysis. You could select Basic Version or Advanced Version. 6) Click "TRADE" to enter to trading page.
 HSBC Holdings Plc HK: 0005.HK Bid Ask S8.250 0.33% S8.200 58.250 Vol(K) 13.428.3 BVOI(K) 333.6 SVOI(K) 108.0 Prices delayed by 15-30 mins 7 Limit Auction Limit Auction BUY 8 SELL Limit Price (HKD) 9 58 Quentity (Lot Size: 400) 10 400 Payment Type Cosh Settlement Currency HKD Validity Day	 Select Order Type, "<u>Limit Order</u>", "<u>Auction</u> <u>Order</u>" or "<u>Limit Auction Order</u>". Select "BUY" or "SELL". Enter Order Price. Enter Order Quantity. Enter Password. Click "SUBMIT".
Advisory Order Password Confirmation Password Confirmation Cash Batance Cash Batance 15,098.03 HKD Available Balance 15,098.03 HKD GROSS VALUE 23,200.00 HKD 12 SUBMIT	Note: You will be NOT able to place the order on your own if selected [Advisory Order]. The reminder will pop up: Advisory order has to be placed through your account executive/ dealer. Please contact your account executive/ dealer for processing the order or our Customer Services Department at 22776555 for assistance.

P 輝 立 証 券 集 團 Phillip Securities Group	Ver 2022
Image: Second rest of the second rest of	Ver. 2023 13) Click "CONFIRM" to submit the order after confirmation.
Image: Stocks Phillipmart Stocks Phillipmart Cash: View Details Total Portfolio Value *IKD Based Total Cash Balance Total Cash Balance Positions Orders Cash Total Cash Balance Positions Orders Cash Total Cash Based Positions Orders Cash Mare * Action * Status * Filled QfV * Total Qiv HSBC Holdings Plc Pice * Status * Filled Div * Total Qiv HK:0005 14 Buy Received Community Markets Trade Community	 14) Order status can be checked in order list after submitted successfully. <u>Received</u> - The order has been accepted. <u>Pending</u> - Order is pending for approval. <u>Done</u> - Order is fully done. <u>Partially Done</u> - Order is filled partially, the rest is still in queue. <u>Withdrawn</u> - Order is successfully withdrawn. <u>Pending Withdrawn</u> - The order is pending to cancel. <u>Partially Withdrawn</u> - Order is part filled, the rest is successfully withdrawn. <u>Amend</u> - Order is successfully amended. <u>Rejected</u> - Order has been rejected. Please contact your account executive for further enquiries.



ii. Withdraw Order

Stocks Phillipmart Cash: View Details Total Portfolio Value View Details 86,156.05 View Details Total Cash Balance 79,756.05 TRADE Cash	
Cash: View Details > Total Portfolio Value 866,156.05 Total Cash Balance 79,756.05 TRADE Positions Orders Cash	
Total Portfolio Value "HKD Bused 86,156.05 "HKD Bused Total Cash Balance 79,756.05 TRADE Positions Orders Cash	
Total Cash Balance 79,756.05 TRADE Positions Orders Cash	
79,756.05 TRADE Positions Orders Cash	
TRADE Positions Orders Cash	
Positions Orders Cash	
Today's Orders 🗸 🗸	
Name Action Status Filted Qty Price Type Total Qty	
HSBC Holdings Plc Buy Received 0	
EQ HK-0005 1 58.000 Limit 400	
₩atchlist Markets Trade Community Me	
2) View order detail and click "WITHDRAW"	0
continue.	
HSBC Holdings Plc Order Received 3) Click "WITHDR & W ORDER" for	
5) CICK WITHDRAW ORDER 101	
Order No. Order Type Action	
020030302653380 Limit BUY 43	
Price (HKD) Quantity Validity 58.000 400 Day	
Payment Type Currency Cash HKD	
Urder History Log	
Status Price Quantity Received	
2073-03-02 18:08:58:970 58:000 400	
2 WITHDRAW	
Withdraw Order X	
HSBC Holdings Plc BUY	
Order No Price (HKD) Quantity 0200303026533804 58.000 400 3	
3	
WITHDRAW ORDER	



iii. Order Status

無SIM卡 夺	18:13	(The [Orders] is available to view order records of
Stocks Phillip	pmart	0		latest 5 working days.
Cash: •••••		View Details 🗲		
Total Portfolio Value				
Total Cash Balance				
	TRADE			
Positions	Orders	Cash		
	Today's Orders		~	
	Today's Orders			
	03 Feb 2023			
	021602023			
Watchlist Markets	↓î Trade	Community Me		
無SIM卡 奈	18:09	l	•	View orders status
Stocks Phillip	pmart	Ø		view orders status.
Cash: ••••••		View Details >		
Total Portfolio Value				
Total Cash Balance				
	TRADE			
Positions	Orders	Cash		
	Today's Orders		~	
	Action Price ‡	Status + Filled Qty Type + Total Qty	•	
HSBC Holdings Plc	Buy 58.000	Received Limit 4	0	
Tencent Holdings	Buy 349.600	Pending Withdrawn Limit 1	0	
Watchlist Markets	↓↑ Trade	ු උ Community Me		



B. Watchlist

Adding Stock to Watchlist i.

專





	無SIM卡 穼	10:10		1 100% 💋	[Create Group]
1	≡ WatchL	ist1		QÂ	
	Hang Seng	Nasdaq C	ChiNext	SZSE 100	1) Click " \blacksquare " at the upper-left corner.
	17,666.440 -284.410 -1.58%	13,290.776 -26.155 -0.20%	2,107.955 -10.970 -0.52%	4,739.901 -15.293 -0.329	
	Name ‡ 🚫 💉	0_		Change% \$	
	HSBC Holdings Plo		58.050	-1.02%	
	Hong Kong Ferry H EQ HKEx: 0050 🔇	loldings	4.820	-2.23%	
	Tencent Holdings		321.800	-0.98%	
		Add Count			
				汇丰钼	
	<u>~</u> 6	⊕ ↓↑	்	،L+t	
	Watchlist Mar	kets Trade	Community	Me 100% 🚱	
	Groups	10.10	Ô	QÂ	2) Click "Create Group".
	— WatchList1 (3)		O_	SZSE 100	
				4,740.00	
				-1.02%	
				-2.23%	
				-1.05%	
) (c	create Group		F港证券交易所	
	4		ity	Me	

■ 揮 立 証 券 集 團	
Phillip Securities Group	Ver. 2023
無SM卡 令 10:11 100% ⊯ Groups ② 〇 △	 Define the group name and click "Confirm" to create new Watchlist group.
WatchList1 (3)	
Create Group	
WatchList2 3	
Cancel Confirm	
Create Group	
minite State Sta	4) Tap the name of the watchlist and switch to the required list.
Hang Seng Nasdaq C ChiNext SZSE 100	1
-229.090-1.28% -26.155-0.20% -10.402-0.49% -14.055-0.30 Name # S N 2 Price # Change% #	
HSBC Holdings Plc 58.050 -1.02%	
Hong Kong Ferry Holdings 4.820 -2.23%	
Tencent Holdings 321.600 -1.05% EQ HKEx: 0700 •	
Add Counter	
Kong Stock Exchanges 汇丰银行在伦敦和香港证券交易所回购 4	
Watchlist Markets Trade Community Me	





C. Markets

Stocks i.

≡sim≉ ≎	10:38 100%	Stay informed the latest market information,
		including the Top Volume, Top Gainers, Top
		Losers of HK or US market.
Hang Seng Index	Hang Seng Hang Seng China - Aff China Corp Index Enterprises In	
17,815.490 -135.360 -0.75%	3,506.400 -34.670 -0.98% 6,111.380 -35.610 -0.58%	
View All 🗲		
Top Volume		> ·
Name		
JP#HSI RC2310J	0.054 8,397,210.0	
SG#HSI RC2410C EQ HKEx: 52153 ()	0.053 8,101,750.0	\heartsuit
UB#HSI RC2312S	0.051 7,516,290.0	\diamond
UB-HSI @EC2312C	0.052 6,552,670.0	\heartsuit
UB-HSI @EC2312D EQ HKEx: 18000 @	0.065 5,396,220.0	\heartsuit
Ton Cainere	ൂ↑ ്ര 	

ii. **IPO**

E SIM + ♀ Stocks P HK Grder History Subscribing(0)	10:38 News Calenda Calculator Calendar	100%∎ ar Q ᠿ
Name		Expiry
To be listed(0)		
	Allotment Date	
Listed(0)		
Name		Chg %
Application (21)		
Name		HKEX File
Genecast Group	1st submission	View
		View
Growatt	1st submission	View
Watchlist Mar	ີ່ ↓↑ ද kets Trade Comm	hunity Me



iii. News

無 SIM 卡 今 10:38 100% (多) Stocks IPO News Calendar Q ↓ My News Equities { 定 = 報行在伦敦和香港证券交易所回购 470 万股股票 2 hours 19 mins ago HSBC Buys Back 4.7 Million Shares in London, Hong Kong Stock Exchanges 2 hours 19 mins ago 7 目公中国一王车結局他长 994	To access the latest news of various markets and products, you will have your finger on the pulse of what's happening in the market to better capture investment opportunities.
7月10年1日二手半時童増长8% 2 days ago China's Used-Car Sales Value Rises 8% in July 2 days ago 汇丰银行在香港伦敦回购 460 万股股票 3 days ago HSBC Repurchases 4.6 Million Shares in London, Hong Kong 3 days ago 汇丰银行在香港伦敦回购 470 万股股票 4 days ago	
HSBC Buys Back 4.7 Million Shares in London, Hong Kong 4 days ago 胞讯第二季度利润飙升41% 4 days ago Tencent's Profit Surges 41% in Q2 4 days ago 汇丰银行在香港、伦敦交易所回购460万股股票 4 days ago 正丰银行在香港、伦敦交易所回购460万股股票 Markets Trade Community Me	

iv. <u>Calendar</u>

01:15 PBoC Interest Rate Decision • 34.5% 34.0% Actual Concensus 06:00 Producer Price Index (MaN) • N/A -0.20% Actual -0.20% Producer Price 0.00% Actual -0.20% Producer Price 0.00% Actual -0.20% Previous Previous Previous Previous Previous Previous Previous N/A -0.00% Actual -5.10% Concensus Previous N/A 0.00% Actual Concensus Previous N/A 0.000 Actual Concensus Previous	無 SIM 卡	To view event schedule of different countries. Such as Bond Auctions, Capital Flows, Economic Activity, Holidays and so on.
	01:15 M PBoC Interest Rate Decision ● 3.45% 3.40% Actual Concensus 06:00 Producer Price Index (MoM) ● N/A -0.20% Actual Concensus Producer Price Index (YoY) ● N/A -5.10% Actual Concensus Producer Price Index (YoY) ● N/A -5.10% Actual Concensus Previous 0:00 German Buba Monthly Report ● N/A N/A Actual Concensus Previous 10:00 German Buba Monthly Report ● N/A N/A Actual Concensus Previous	



D. Community

無SIM卡 令	1:49 🕫 Q Ĵ	* The Community is coming soon - stay tuned!
Analyst Call	>	
Amazon _{AMZN}	UOB UOB.SG	
Accumulate Target Price 120.00	Buy Target Price 35.70	
Thematic Portfolio	>	
Uncovers long-term trends whit economy	ch drive the future of the global	
(thinks)	FINTECH	
Blockchain	Fintech	
	n': month	
Google		
World Leaders with Rule of 40	Innovative Platform Providers	
Watchlist Markets Tr	t↑ Community Me	



E. Me

≣SIM≑ ≎ 11:16 Me {ô}	You could handle your business via $\lceil ME_{\perp} \rangle$ tab.
(Switch Account)	i. <u>Switch Account</u> - Switch to another account
ACCOUNT	ii. <u>Notification Centre</u> - View notification
	iii. <u>Portfolio</u> - Account position and balance
ii, Notication iii, Portfolio iv, Deposit v, Withdraw	iv. <u>Deposit</u> - Upload deposit slip
	v. <u>Withdraw</u> - Cash withdrawal
دے ہے۔ vi,Fund Transfer vii,Options viii, eDDA ix, eCoupon	vi. <u>Fund Transfer</u> - Fund transfer among products
en en	vii. Options Activation - Option account opening
x, Redeem xi, Business	viii. eDDA - Deposit via eDDA
	ix. <u>eCoupon</u> - E-Coupon redeem
SUPPORT	x. <u>Redeem</u> - POEMS point exchange
Help Service Feedbacks, Help Center, Online Chat are	xi. <u>Business</u> - Application forms
ACTIVITY	
₩atchlist Markets Trade Community Me	

Notification Centre ii.

≣sim * २ 15:05 〈 Notification Centre	(¢)	The Notification Centre will push messages of Phillip announcement, promotion, order
((1)) Alerts	>	confirmation, order status reminder and so on.



09:26

Live Intraday

09:15

Market Value 6,400.00

Cash Flow 0.00

1,000

ి

0

6.400

2

80%

Margin Value 0.00

Margin Cap 200,000.00

79 756 05

0.00

View Details >

View Details >

Portfolio iii.

Cash: I

79,756.05

Positions

6.400.00 HKD

HK & China Gas

Cash:

86,156.05

79,756.05 III SIM 卡 😒

< Stocks

79,756.05

Portfolio Value 86,156.05

Fund Transfer 0.00

Allowance 0.00

🚳 HKD Balance

CNY Balance

86,156.05

Local Stock Foreign Stock

 \oplus

86,156.05

≡ SIM ÷ 🧐

[Positions]	
Positions of Local Stock and Foreign Stock.	
Including the stock name, stock quantity, last p	orice,
market value of each stock and total market va	lue.
The tab can be selected to view positions of liv	e or
Intraday.	

<u>Intraday</u>	- Positions	of the day.

[Balance] View account portfolio value and cash balance. For more details, please click "View Details".

Total Portfolio Value: Total market value and cash balance of Local Stock and Foreign Stock. Total Cash Balance: Cash Balance of Local Stock and Foreign Stock. (*HKD Based) Market Value: The total value of your portfolio. (calculate by market price) Margin Value: The margin value of your portfolio. Fund Transfer: Net balance of temporary funds of deposits, withdrawal and fund transfer of the day. Cash Flow: Cash flow balance of intraday trading. Margin Cap - The maximum amount that can be pledged for stock and used as a financing transaction. Allowance: The amount allows for using a loan for stock trading and based on client financial situation. HKD Balance: Cash balance of HKD.

CNY Balance: Cash balance of CNY.

* Above Market Value, Margin Value and Allowance is for reference only.



iv. Deposit

無SM卡 令 10:29 95% ■創 / Deposit Withdraw Fund Transfer	1) Click "Select File".
	2) Select upload method.
Deposit Confirmation	
1 選擇檔案	
Date:2023-07-21 15:51 Status:Received	
Date:2023-05-25 11:59 Status:Received	
Date:2023-05-25 11:58 Status:Received	
Date:2023-05-25 11:49 Status:Received	
Date:2023-05-24 09:37 Status:Received	
毎 SIM 上 今 10:20 05% (死)。	
Composit Withdraw Fund Transfer	3) Choose the deposit slip.
Deposit Slip	
取消 實際大小 (156 KB) 3 選擇	

戸 輝 立 証 券 集 團 Phillip Securities Group	\/er 2023
#SMHまで 11:06 100% 第 ◆ Deposit Withdraw Fund Transfer Deposit Confirmation 『現根儒家 〒 1張照片 ● Submit History (5) Date:2023-07-21 15:51 Status:Received Date:2023-05-25 11:59 Status:Received Date:2023-05-25 11:58 Status:Received Date:2023-05-25 11:49 Status:Received Date:2023-05-24 09:37 Status:Received	4) Click "Submit" to upload the file.
● Deposit Withdraw Fund Transfer Deposit Confirmation 正規構像 尚未退取借像 正規構像 尚未退取借像 Date:2023-08-23 11:06 Status:Received Date:2023-07-21 15:51 Status:Received Date:2023-05-25 11:59 Status:Received Date:2023-05-25 11:59 Status:Received Date:2023-05-25 11:58 Status:Received Date:2023-05-25 11:58 Status:Received Date:2023-05-25 11:49 Status:Received Date:2023-05-25 11:49 Status:Received	5) The status will be shown as "Received" when uploaded successful. You could view the previous upload history in this page.



Phillip Securities Group

v. Withdraw

≣sim≉ 중 11:17 ☞ ✓ Deposit Withdraw Fund Transfer	1) Click "Add".
windraw Money	
Add Record (0)	
m SIM +	2) Select the required product to withdraw
C Deposit Withdraw Fund Transfer HK Stock	money.
C Withdraw Money Foreign Stock	3) Select the corresponding currency.
Withdraw From Stock Options	4) Input amount for withdrawal. Available to
Product Local Futures	amount
Acct. No. Forex	5) Select the beneficiary bank account.
	6) Click "Add Withdrawal Instruction".
Currency	
Withdraw Type	
Amount 🗸 ALL	
Custom	
Withdraw To	
Туре	
Default Bank AC 1 5	
Acct. No.	
6 Add Withdrawal Instruction	

■ 輝 立 証 券 集 團 Phillip Securities Group	
	Ver. 2023
#SM+* 15:26 Peposit Withdraw Fund Transfer Currency HKD Withdraw Multidraw Withdraw Withdraw Withdraw Withdraw Mithdraw Withdraw Withdraw Mount Withdraw Mount Default Default Bank AC 1 Acct. No.	7) Click "Submit" for confirmation.
Add Withdrawal Instruction	
mesimet	8) Check withdraw information and order status. For order cancellation, you could
Money Withdrawal	click "Delete" to cancel the outstanding
Add	order.
Record (1)	
From: HK Stock ()) To: Default Bank AC (()) Amount: HKD ALL Order Time: 2023-05-04 15:26:22 Status: Outstanding Delete	



Phillip Securities Group

vi. Fund Transfer

無SIM卡 今 11:17 ®@ く Deposit Withdraw Fund Transfer	1) Click "+".
Fund Transfer	
1 💌	
Order Status	
Select One Search	
Debit From Credit To Status	
No data available in table	
Fund Transfer Note	
 Though this page, you can give fund transfer instruction to transfer fund from your Local Stock Account to Stock Options Account/Local Futures Account/Foreign Futures. Any fund transfer instruction given on or before 4:30PM HKT will be processed on the same working day. Otherwise, it will be processed on the following working day. After instruction of fund transfer from Local Stock Account (HKD) to Stock Options Account (HKD) or to Local Futures Account (HKD) is successfully executed, the fund will be available for trading use in the credit account. After instruction of fund transfer from Local Stock Account (HKD) to Foreign Futures Account (HKD/CNY/USD) is successfully executed, the fund will be show in HKD and available for trading use in the credit account. 	
mssm+t 🗢 13:44 @@® ✓ Deposit Withdraw Fund Transfer	2) Input fund transfer information.
Fund Transfer	3) Click "Submit".
Add Transfer Fund ×	
Account Type (From)	
Select One	
Amount	
нкр ≎ \$ ≎	
Account Type (To)	
Select One	
Currency	
\$	
3 Cancel Submit (HKD) to Stock Options Account (HKD) or to Local Futures Account (HKD) is successfully executed, the fund will be available for trading use in the credit account. After instruction of fund transfer form Local Stock Account (HKD) to Foreign Futures Account (HKD/CNY/USD) is successfully executed, the fund will be show in HKD and available for trading use in the credit account.	



輝 立 証 券 集 團 Phillip Securities Group

	Ver. 2023
無SM卡	4) Check fund transfer details and "Confirm" the
Fund Transfer	instruction.
Transfer Request *	
Debit From	
[Local Stock :] HKD 1.00* Credit To	
[Stock Options :] HKD	
Note : * This is the debit from the transfer total amount. When the currency is different, the system will exchange the currency at the exchange rate of the day's cutoff, so it cannot immediately show the credit amount.	
Cancel Confirm 1. Though this page, you can give fund transfer instruction to transfer fund from your Local Stock Account to Stock Options Account/Local Futures Account/Foreign Futures. 2. Any fund transfer instruction given on or before 4:30PM HKT will be processed on the same working day. Otherwise, it will	
be processed on the following working day. 3. After instruction of fund transfer from Local Stock Account	
(HKD) to stock Options Account (HKD) or to Local Futures Account (HKD) is successfully executed, the fund will be available for trading use in the credit account. After	
instruction of fund transfer from Local Stock Account (HKD) to Foreign Futures Account (HKD/CNY/USD) is successfully executed, the fund will be show in HKD and available for	
無SM卡令 13:45 瞬间 C Deposit Withdraw Fund Transfer T	5) Fund transfer instruction submitted
Fund Transfer	successfully.
•	
Order Status Select One O Search	
Sucess !	
Data Save Successfully !	
5 ОК	
will be processed on the same working day. Otherwise, it will be processed on the following working day. 3. After instruction of fund transfer from Local Stock Account (HKD) to Stock Options Account (HKD) or to Local Futures Account (HKD) is successfully executed, the fund will be available for trading use in the credit account. After instruction of fund transfer from Local Stock Account (HKD) to Foreign Futures Account (HKD/CNY/USD) is successfully	



vii. Options Activation

專

無 SIM 卡 今 11	5:29 90%	[US Stock Option]
		* US Stock Option is coming soon - stay tuned!
US Stock Option	Account Opening	
CON SO	1ING ON	
^{無SIM} 卡 奈 11 ·42 100% く啟用期權	▶ ≝SIM卡 <> 11:54 100% ⊮ ↓ 飲用期權	【HK Stock Option】
US HK	us <u>HK</u>	1) Fill in the Declaration/Acknowledgement of
啟用股票期權 20%	故用股票期權	HK Stock Option Account Opening.
港股期權開戶表格	開戶風險聲明 1.本人/吾等欲使用POEMS電子服務,本人/吾等已經間讀並明白網 - 次星拉諾修教,其接受這些修動的約束	2) Check the agreement and click "Submit".
	 請按照期權交易協議為本人/吾等開立期權賬戶,本人/吾等已經 明白期權交易協議的條款,并接受這些條款的約束 	(It is required to have Derivatives Knowledge and
1. 你的配偶是否擁有輝立證券的孖展戶口?	3.本人/吾等在此授權公司向香港聯合交易所期權結算所提交本人/ 吾等之持倉由期權結算所以組合基礎計算及收取有關之按金	the level of Risk Profile Questionnaire should be
○ 是○ 否	4. 本人/吾等不會提供期權戶口網上登入(賬戶登入憑證,訪問權 限)予任何人/第三方	HIGH for opening a stock option account.)
如是,請輸入配偶姓名	5.本人/吾等已細閱譯立証券(香港)有限公司之客戶協議書中附表 三的風險披露聲明內容,如本人/吾等有需要,本人/吾等將發問及 尋求獨立意見	
如是,請輸入配偶戶口號碼	 本人/吾等已根據意願選擇協議書及附表內容的語言(中文或英 文) 	
	7.本協議署內所載列之佩人資料僅用加開期權戶口的申請,客戶個 人資料將依據歸立證券(香港)有限公司簽戶協議中附表2的個人 資料收集暨明來處理	
2. 你是否個人或與你的配偶共同控制輝力證券的公司 孖展客戶 35% 或以上的投票權?	8. 耀立証券(香港)有限公司將收妥關下中請表后14工作天内以書 面形式確認關下之申請,或以電話形式通知關下之申請不被接納	
○是	✓ 我已同意開戶風險聲明及 識券客戶協議.	
如是,請輸入配偶姓名	立即開戶	
如是,請輸入配偶戶口號碼		



viii. eDDA

4 Apply eDDA Service

無SIM卡 今 12	12 1	1) Under the tab named [Apply Service], click
<pre></pre> <pre><</pre>		"+Add New".
eD	DA	
P ^辉 立証 Phillip Secu	券 集 團 ırities Group	
eDDA Service		
C Refresh Deposit Money Apply Service	• Post Date eDDI	
Date ↑↓ Pro	duct A/C ↑↓ Status ↑↓	
No data avai	lable in table	
Showing 0 to	0 of 0 entries	
	< >	
≰SIM+† रे 11:20 #	ISIMま ? 11:20 ■	2) Fill in the form
≰sim≑रु 11:20 # ∢ eDDA	isim≑ 중 11:20 ■ ✔ eDDA	 Fill in the form. Read and agree with terms and conditions
≋SIM+* रू 11:20 ≰ eDDA eDDA	క⊪గ≑ ≎ 11:20 ■ < eDDA eDDA	 Fill in the form. Read and agree with terms and conditions.
KSM+? 11:20 # くeDDA eDDA ■ 揮立証券集團	sim≑ रू 11:20 < eDDA eDDA	 Fill in the form. Read and agree with terms and conditions. Click "Submit".
■SIM # ♥ 11:20 # <pre> eDDA eDDA eDDA # 立 証 券 集 團 Phillip Securities Group Please confirm the submitted details are the </pre>	SIM 등 후 11:20 = C eDDA eDDA Payee Account #	 Fill in the form. Read and agree with terms and conditions. Click "Submit".
kSM+★ 余 11:20 # ◆ eDDA ●DDA ●DDA ● 超 立 証 券 集 图 ● Phillip Securities Group Please confirm the submitted details are the same with the registered bank account	ISIM # II:20 C eDDA eDDA Payee Account # Registered Mobile #	 Fill in the form. Read and agree with terms and conditions. Click "Submit".
■ # 立 証 券 集 團 Phillip Securities Group Please confirm the submitted details are the same with the registered bank account Registered Bank A/C #	SIM +	 Fill in the form. Read and agree with terms and conditions. Click "Submit".
NH★★★ 11:20 # ◆ eDDA ●DDA ●DDA Please confirm the submitted details are the same with the registered bank account Please Select ↓ Please Select ↓	ISIM # II:20 C eDDA eDDA Payee Account # Registered Mobile # Registered Identification #	 Fill in the form. Read and agree with terms and conditions. Click "Submit".
▲SIM ★ ◆ 11:20 # < @DDA eDDA ● 都立証券集團 Phillip Securities Group Please confirm the submitted details are the same with the registered bank account Registered Bank A/C # Please Select ○ Client Name	SIM ★	 2) Fill in the form. 3) Read and agree with terms and conditions. 4) Click "Submit".
■SM+ ♥ 11:20 # ◆ eDDA ●DDA ●DDA ●DDA ● DDA ● DDA ● DIA ● DIA	SIM ★	 2) Fill in the form. 3) Read and agree with terms and conditions. 4) Click "Submit".
■SIM + * 11:20 # ◆ eDDA ●DDA ●DDA ●DDA ● DDA ● DDA ● DDA ● Phillip Securities Group Please confirm the submitted details are the same with the registered bank account Please Select ● Please Select ○ Client Name ● Client Name ● Currency HKD	SIM ★	 Fill in the form. Read and agree with terms and conditions. Click "Submit".
▲SIM ★ ② 11:20 # ◆ eDDA ●DDA ●DDA ●DDA ● DDA ● Phillip Securities Group Please confirm the submitted details are the same with the registered bank account Please Select ● Please Select ○ Client Name ● Currency HKD ● 2	SIM ★	 2) Fill in the form. 3) Read and agree with terms and conditions. 4) Click "Submit".
■SIM # ♥ 11:20 # eDDA eDDA eDDA PDDA	SIM ★	 2) Fill in the form. 3) Read and agree with terms and conditions. 4) Click "Submit".
■SIM + * 11:20 # eDDA eDDA eDDA PDD	SIM ★	 2) Fill in the form. 3) Read and agree with terms and conditions. 4) Click "Submit".
■SIM + * 11:20 # ◆ eDDA eDDA eDDA PDDA	SIM ★	 2) Fill in the form. 3) Read and agree with terms and conditions. 4) Click "Submit".
▲SIM ★ 常 11:20 # ◆ eDDA ●DDA ●DDA ●DDA ● DDA ● DDA ● DDA ● Phillip Securities Group Please confirm the submitted details are the same with the registered bank account Please Select Client Name ● Currency HKD Product A/C Please Select Please Select	SIM ★ ② 11:20 < eDDA eDDA Payee Account #	 2) Fill in the form. 3) Read and agree with terms and conditions. 4) Click "Submit".
■ 11:20 # eDDA eDDA eDDA PDDA	SIM ★ 11:20 < eDDA eDDA Payee Account #	 2) Fill in the form. 3) Read and agree with terms and conditions. 4) Click "Submit".

▶ 輝 立 証 券 集	團		
Phillip Securities Gro	up		Ver. 2023
isim ≑ \$ 11:22 ■isim ≑ \$ < eDDA < eDDA	11:22	5)	Confirm the submitted details are the same with the registered bank account, and click "OK".
Phillip Securities Group	edda Securities Group	6)	Enter PHK Key and click "OK" to submit the
Registered Bank A/C # Registered Bank A/C #			application.
Client Name Client Name			
Currency HKD Currency	НКД		
- <u>!</u>	asse Enter PHK Key		
Please confirm the submitted details are the same with the registered bank account d	d		
5 ок Сапсеі 6 ос	K Cancel		
Registered Mobile # Registered Mobile #			
Registered Identification # Registered Identification	. #		
Submit	Submit		
Back	Back		
無SIM卡 令 12:12	4 (1),	7)	A new record will be shown in the table under
C edda			the tab $\lceil \text{Apply Service} floor$.
eDDA	2		
₽ ^輝 立 証 券 集 Phillip Securities Grou	<u>卑</u>		
eDDA Service			
C Refresh			
Deposit Money Apply Service Post Date eDDI			
+ Add New			
Date 1⊥ Product A/C 1↓ St	atus î↓		
✓ 2021-03-22 12:33 7 Local Stock			
Showing no rorrentnes	1 >		

* eDDA application status:

Activo	The eDDA has been set up successfully, you may now start making a deposit through
Active	eDDA to your Phillip account.
Donding	The instruction will be effective shortly (Subject to the processing time of designated
renuing	bank). Please wait patiently.
Deject	The eDDA cannot be set up, please try it again or contact Customer Service
Keject	Department at 2277 6555 for more information.
Cancel	The eDDA has been cancelled.



eDDA Deposit

● Core Partie	 Under the tab named 「Deposit Money」, click "+ Add New". (Please make sure the payment bank you wish to debit from, has a green "Active" status under 「Apply Service」 dashboard. If not, please see the above manual for setting up an eDDA.) Fill in the form, and click "Submit".
< eDDA	2) This in the form, and check Subline .
Product A/C Prease Select Prilip A/C # Please Select Prilip A/C # Please Select Bark Name Product A/C # Select Select Prilip A/C # Product A/C # Select Product A/C # Product A/C # Product A/C # Product A/C # Product A/C # Product A/C # Product A/C # Product A/C # <p< th=""><th></th></p<>	

P 輝 立 証 券 集 團 Phillip Securities Group	Ver. 2023
#SIM # ♥ 15:19 ●DDA ●DDA ●DDA ●DDA ●DDA ●DDA ●DDA ●TOM Phillip Securities Group From From 「 Please Enter PHK Key ● ● ● ● ● ● ● ● ● ● ● ● ●	3) After confirming details input are correct, please enter PHK Key and click "OK".
■ SIM + ♥ 15:18 ● DDA ● DDA ● DDA ● DDA ● DDA Service	4) In the dashboard, a new record will be shown in the table. More information can be seen by pressing the arrow.

* eDDA deposit status:

Activo	The amount has been deposit to Phillip successfully, you may now start trading with the	
Active	new money (The amount will reflect in HK Stock > Teletext > Position > Fund Trf).	
Pending	The deposit is on its way, please wait patiently.	
Deiest	The deposit cannot be transferred to Phillip, please try it again or contact Customer	
Reject	Service Department at 2277 6555 for more information.	



ix. eCoupon

≡sim÷≎ ✓eCounon	14:26		1)	Select the required e-coupon and click
	eCoupon			"Redeem" button at the bottom right of the e-
My Coupon (2)	Lised (0)	Evoired (11)		
All \$	Used (0)	Expired (1)	2)	Select "Product" > "Type" > "One of the transactions"
Happy Birthday	所股手續費優惠券		3)	Click "Confirm" to redeem the e-coupon.
100 ^{HK\$} 100 ^{HK\$} 24	PO Handling Fee Coupon 023-02-23 - 2023-08-22	1 Redeem	4)	E-coupon redeemed successfully.
50%	∩股孖展利息優惠券 PO Margin Interest Coupon 023-02-23 - 2023-08-22	Redeem		
msim + 奈 〈 eCoupon	14:26			
	eCoupon			
Description 此優惠券適用於 最高可享HK\$100 This e-Coupon is to one coupon ca enjoy a maximur	i 抵扣新股手續費,每單交易最多 D現金回贈。 s applicable for IPO Handling I an be applied on each transac m of HK\$100 cash rebate.	5可使用一張現金券, Fee redemption. Up tion. Customer can		
Product				
IPO		٥		
Туре				
Handling Fee		0		
Please select on	e transaction			
Currency	Handling Fee	Trade Date		
НКД	68 2	2023-05-19		
Terms & Co 1. No changes or ca 2. "E-Coupons" can deducted in full wi 3. E-Coupon reidem Coupon issue dat	nditions nonlation can be made after submission to be converted to cash. The total value there used, Any unused balance will be for prior to early applicable to transactions or for the only applicable to transactions or e, and up to the day before the E-Coupe	of each "E-Coupon" will be reliefed. In expiry date. (Except for		
Coi	nfirm use this e-Co	upon?		
Currency	Commission	Trade Date		
RU		2023-05-19		
	Cancel	5		
	\checkmark			
	Success			
	E-coupon successfully redeeme	id.		
	4 ок			



x. Redeem

無SIM卡 令 15:24 100% ☞	1) Select the service you would like to exchange.
Prize Redemption	
4970 Point(s) >	
Items (54) Records (6)	
All	
Streaming (Real-time) teletext	
U.S. Streaming (Real time) price quote	
# SIM †	2) Select redeem by point or cash.
< Prize Redemption	 3) Select the type of the service. 4) Clicite "A nulle"
Streaming (Real time) teletext	4) Click Apply .
Description 2000 POEMS points or HK\$288 for converting to streaming (Real time) teletext service for 1 month (From today to the last day of this month)) to access price quote and broker queue. Please note you can only redeem the streaming teletext in coming 3 months. The application deadlines for RealTime Teletext are set on the end of the third working day each month. Any application after such line will be processed next month. If client wants to activate this service after deadline, please contact Customer Service Department on 2277 6555.	
Redeem By Point/Cash	
Point 2	
Type Streaming (Real time) teletext for 1 month (Point : 2000) 3	
Apply 4	
Terms & Conditions 1. Philip Socurities (HK) Ltd. / Philip Commodities (HK) Ltd. accepts no liability for the goods provided by the merchanis involved in this promotion. 2. Philip Socurities (HK) Ltd. / Philip Commodities (HK) Ltd. reserves the right to suspend, rovise or terminate the offer and to amend the terms and conditions thereof	

日輝	立証券集團					
	initip Securities Group					Ver. 2023
	ESIM t द 15:25 100% ∰ KRedeem	5	5) Cli	ck "Confirm	" to redeem the servic	e.
	< Prize Redemption					
	Streaming (Real time) teletext					
	Description 2000 POEMS points or HKS288 for converting to streaming (Real time) telefoxt service for 1 month (From today to the last day of this month)) to access price quote and broker queue.					
	Redeem?					
	Point 2000					
	Note: Teletext points are limited to 12,000 points. If the redemption service request is rejected or cancelled due to not being applicable, the relevant points will be returned to the account, however the amount exceeding the upper limit will not be refunded.					
	Cancel Confirm 5					
	Apply					
	Terms & Conditions 1. Philip Securities (HK) Ltd. / Philip Commodiles (HK) Ltd. accepts no liability for the goods provided by the merchanist involved in this promotion. 2. Philip Securities (HK) Ltd. / Philip Commodiles (HK) Ltd. reserves the right to support, provide on the merchanist the offer and a small the terms and conditions thereof.					
	≣SM-∜ \$ 15:26 100% ∰	6	5) Re	demption suc	ccessful.	
	< Prize Redemption					
	2970 Point(s) >					
	Items (54) Records (7)					
	All					
	\checkmark					
	Success					
	Please wait for approval					
	U.S. Streaming (Real time) price quote					

D P Ph	立証者	条集團	
	imp Securit	ies Group	Ver. 2023
	無SIM卡 令 15	i:26 100% ⊯ ⊅	7) The redeem records and status can be viewed in
	< Redeem		tab "Records".
	< Prize R	Redemption	
	2970	Point(s) >	
	Items (54)	Records (7)	
	Streaming (Real time) telete	ext for 1 month	
	Redeem By Point/Cash : 2000 Apply Date : 2023-08-23	0 pts Pending	
	Streaming (Real time) telete	ext for 1 month	
	Redeem By Point/Cash : 2000 Apply Date : 2023-08-23	0 pts Rejected	
	Streaming (Real time) telete	ext for 1 month	
	Redeem By Point/Cash : 2000 Apply Date : 2023-08-21	0 pts Rejected	
	無SIM卡 令 15	:24 100% 💋	[Point Information]
	Kedeem		Total Point : Total point
	Prize Re	demption	Locked Point: The point which is redeemed
	4970	Point(s) >	<u>Locked Form</u> . The point which is redecided
		5	service and pending for processing
	Items (54)	Hecords (6)	<u>Snapshot Available Point</u> : Remain available point
	≝sim t; 🗢 15 Kedeem	::26 100% 🚱	Snapshot Usage: Used point of the month Realtime Expiry Date: Realtime teletext expiry
	< Prize R	Redemption	deta
	Point Int	formation	
	Total Point	4970 Point	<u>Point Calculate</u> : Point calculation method.
	Locked Point	2000	
	Snapshot Available Point	2970 Point	
	Snapshot Usage	0 Point	
	Realtime Expiry Date	2021-05-28	
		You will goin 1 point with HKS	
	Point Calculation	400 turnover by trading HK Stock in POEMS	
	Note: 1. The maximum bonus point is 12,000 and points. 2. The point calculation of trading ETF/ War is HKS2,000 turnover for 1 point.	there will be no further increase over 12,000 rrant/ CBBC promotion list's stock in POEMS	



xi. Business

mesiness Form Form Filter + 1	1) Click "+" to add form.
無SIM卡 令 10:47 92% 三)・ く Business	2) Select the form.
Form	(Please contact Customer Service at 2277 6555
Individual Application Form ×	to require other application forms.)
Account Number	3) Click "Submit" to add form.
Form type ✓ Select One 2	
Change Account Type 3 Confirmation Submit Close	
TradeGO Trading Platform	
HK Stock SI-in Instruction POEMS Trading Function	
Activation	
and Experience Questionnaire	
Virtual Assets Knowledge Test	

P P Ph	立証券集 illin Securities Gr	團 oup					
		oup					Ver. 2023
	Business Form	32% -	4)	Click	"Pending", yo	u may enter	to the form.
	4 Pending HK Stock SI-in Instructic Expiry date: 2023-08-31	n					
	ESIM † ♥ 10:54 Business Form	84% 💷)	5)	Fill in "Subn	the form with nit/Apply" to s	your signations your signations are submit the fo	ure and click rm.
	Stock Quantity SI Details 3 : Stock Code						
	Stock Quantity						
	SI Details 4 : Stock Code						
	Stock Quantity						
	Your signature (Typing your name below serves a signature)	is your					
	5 Submit / Apply	Close					

* Form Status:

Pending	Pending for client fill in.
Applied	Form submitted successfully
Pending Approval	Application is pending for approval.
Done	Application is approved.
Detected	Application has been rejected. Please re-submit the form or contact Customer
Kejected	Service at 2277 6555.



4. Setting

A. Language

≣sim ≑ 奈 ✔ Settings	11:53	81% 🗖
General		>
Account & Security		
Digital Token		
Watchlist		
News		
Calendar		
Notifications		
	version 12.3.P	
	[→ Logout	





3) Choose your **preferred language**.

1) "General".

2) "Language".



輝 立 証 券 集 團 Phillip Securities Group

B. Link Account



1) "Account & Security".



2) "Link Account".



3) Enter the SMS verification code.



4) Enter your Phillip Account
 Number, ID No., and click
 "LINK ACCOUNT".

P

輝 立 証 券 集 團 Phillip Securities Group

C. Change Password

無SIM卡 중	11:53	81% 🔲
General		5
Account & Security		
Disitel Telier		
Digital loken		>
Watchlist		>
News		>
Calendar		>
Notifications		>
	Version 12.3.P	
	[→ Logout	

1) "Account & Security".

無SIM卡 穼	11:54	81% 🔲
Account & S	ecurity	
Remember My Mot	oile No on Login	
Ask Password on T	rade	
Link Account		>
Change Password		>

2) "Change Password".

無SIM卡 夺 11:5	56 81% 🔲
Change Password	
Current Password	Ø
New Password	Ø
Confirm New Password	Ø
Password Requirement Your password must contain in characters, and include a cor (0-9), lowercase character (a NOTE: This will change the pass account numbers as listed belo email/mobile login.	minimum 8 alphanumeric nbination of a number -z] and uppercase (A-Z]. sword for all of your individual w and also your password for
SUBI	міт

Ver. 2023

 3) Enter the Current Password, New Password, Confirm
 New Password, and click
 "SUBMIT".

無SIM卡 🗢	14:40	94% 🔲
Account &	Security	
Remember My Mo	obile No on Login	
Ask Password on	Trade	
Link Account		>
Change Password	i.	>
Sector 1	Password changed successfull	У

4) Password changed successfully.