

poems



Phillip's Online Electronic Mart System

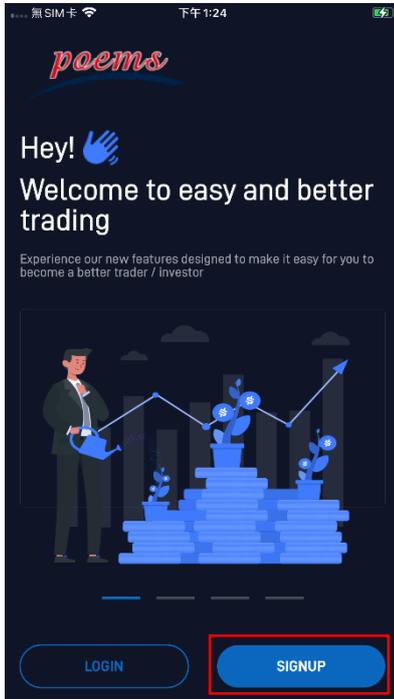
**POEMS 3.0
User Guide**

2023-09-01

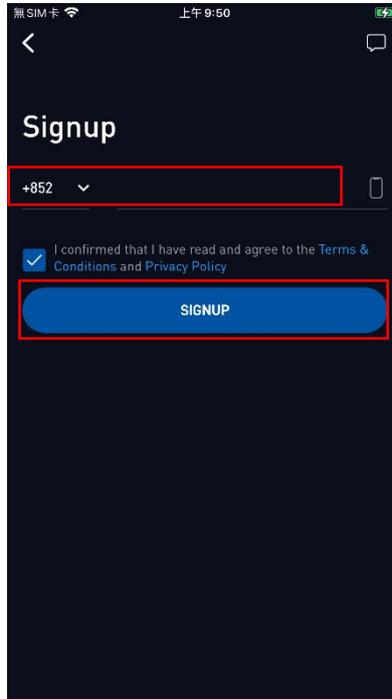
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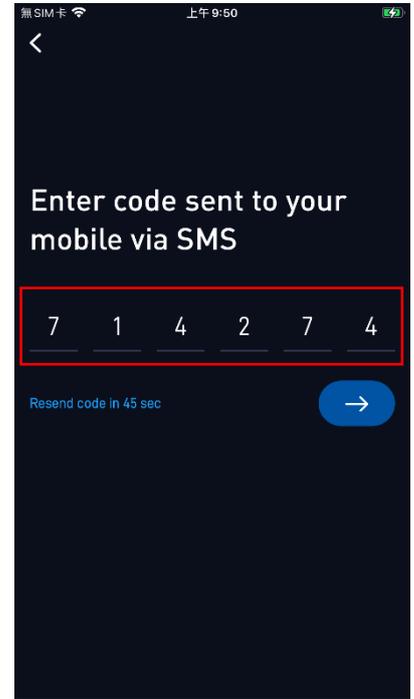
1. Registration



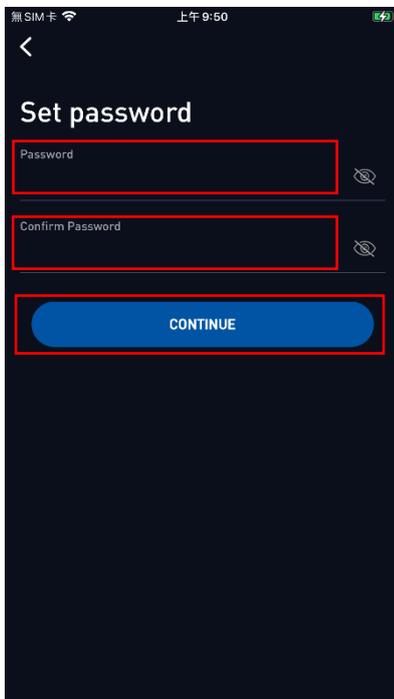
1) Click “SIGNUP”.



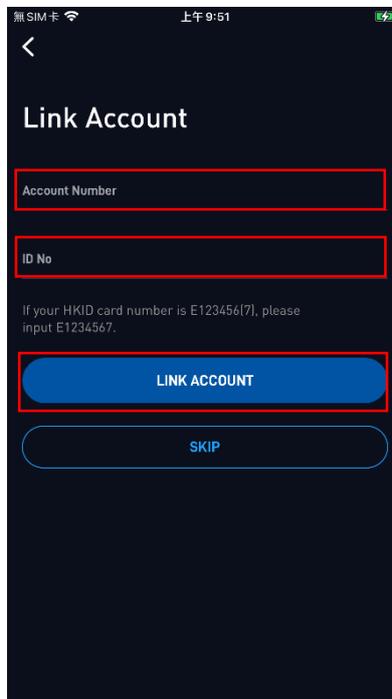
2) Enter your mobile number and click “SIGNUP”.



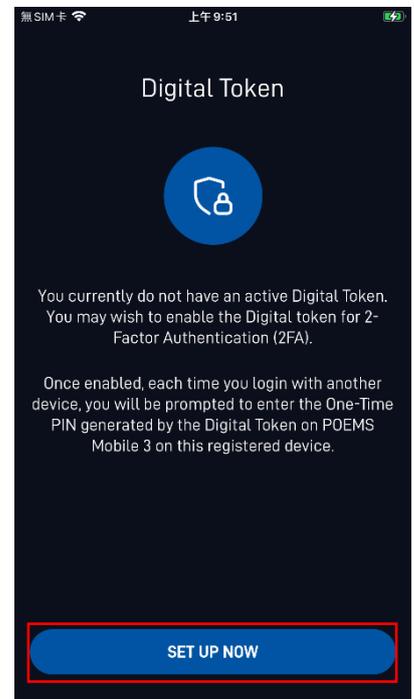
3) Enter the **SMS verification code**.



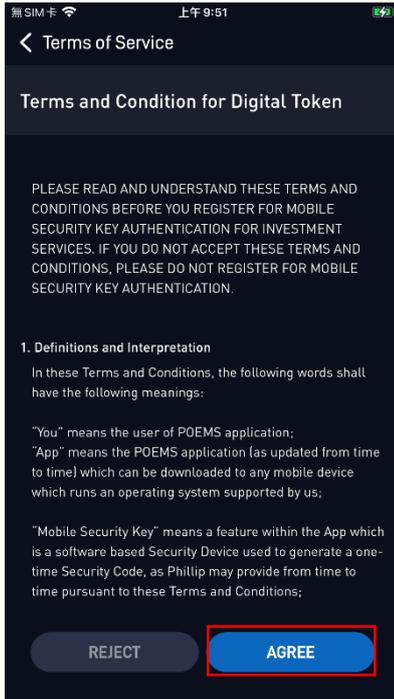
4) Set your password and click “CONTINUE” to register.



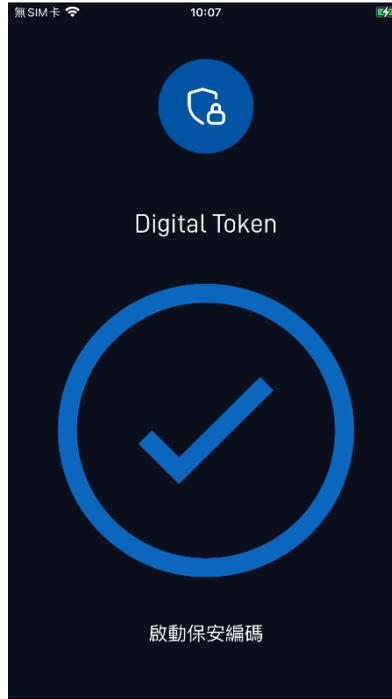
5) Enter your Phillip Account number and ID number to “LINK ACCOUNT”.



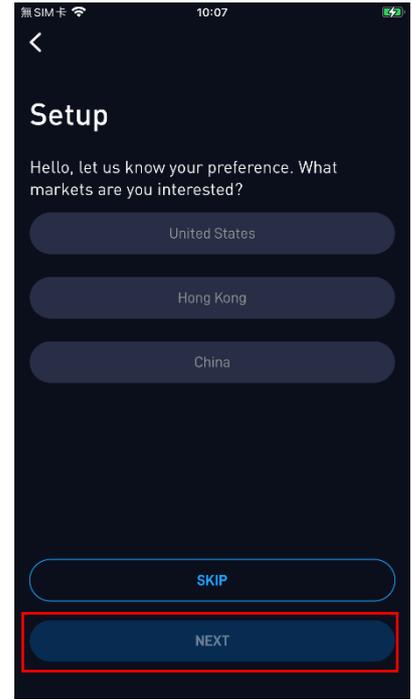
6) Click “SET UP NOW” to set up Digital Token.



7) Read Terms and Condition for Digital Token and click “AGREE”.

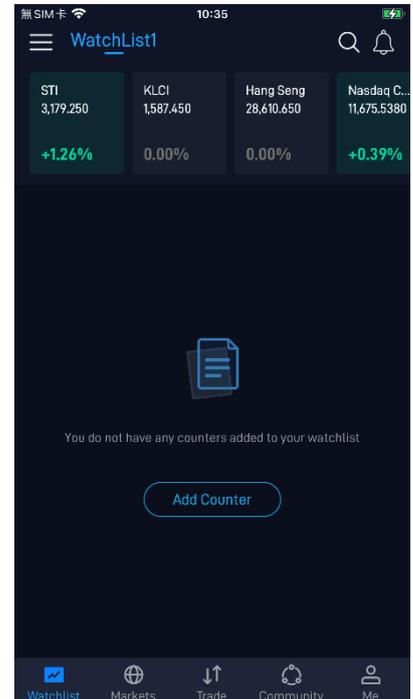
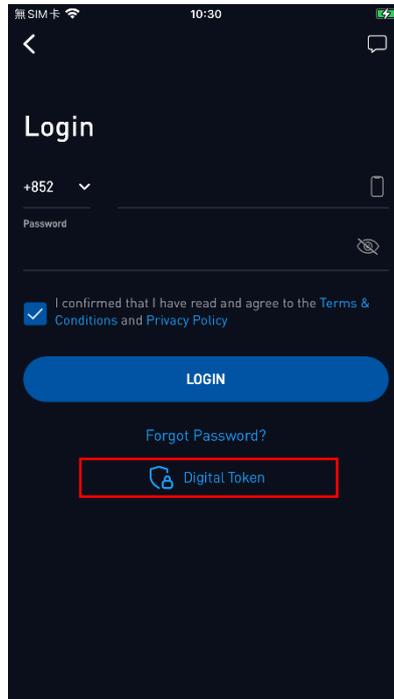
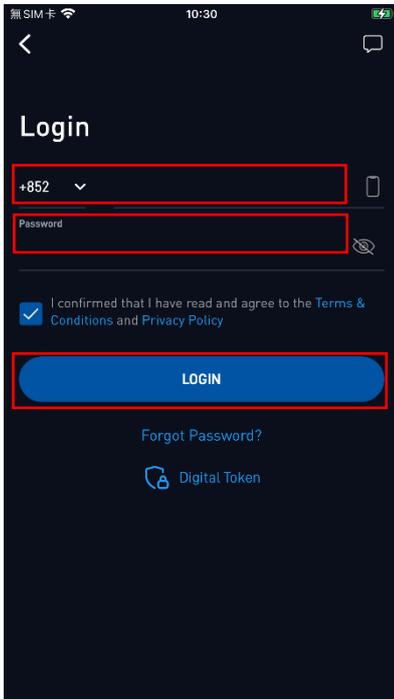


8) Digital Token has been activated successfully when “✓” appears.



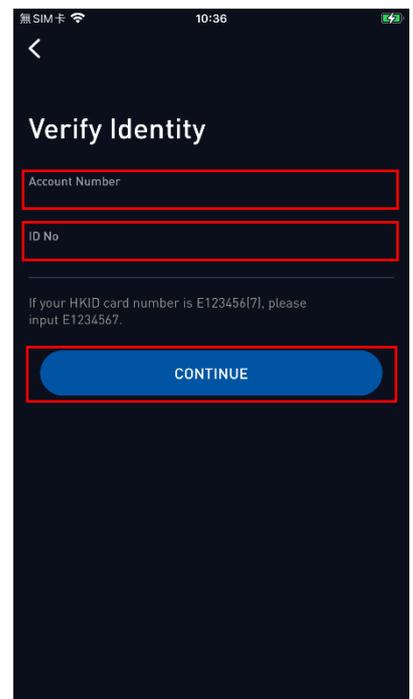
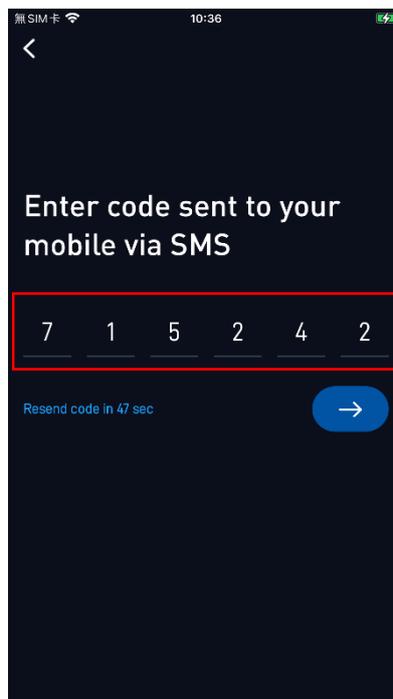
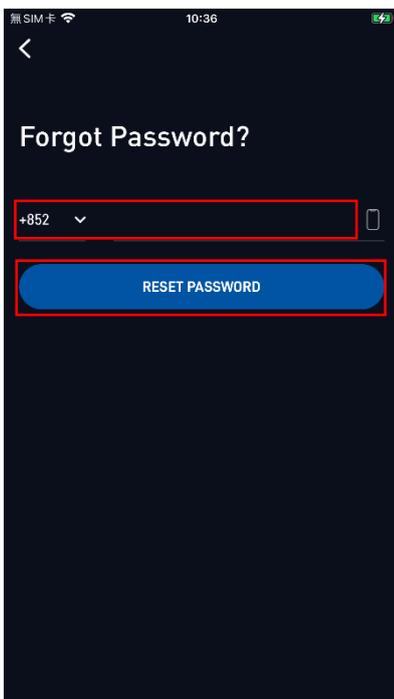
9) Select the markets you are interested and click “NEXT”. The registration is completed.

2. Login

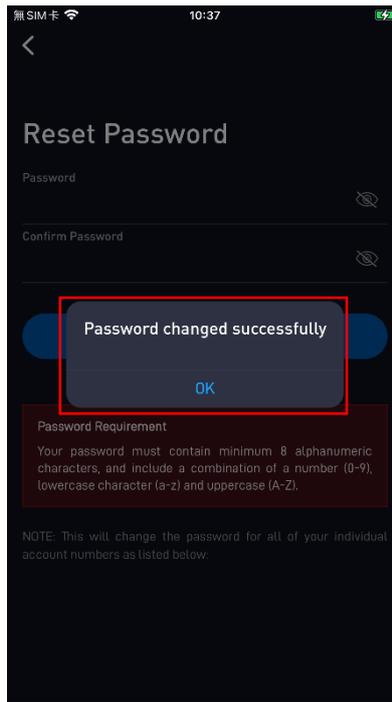
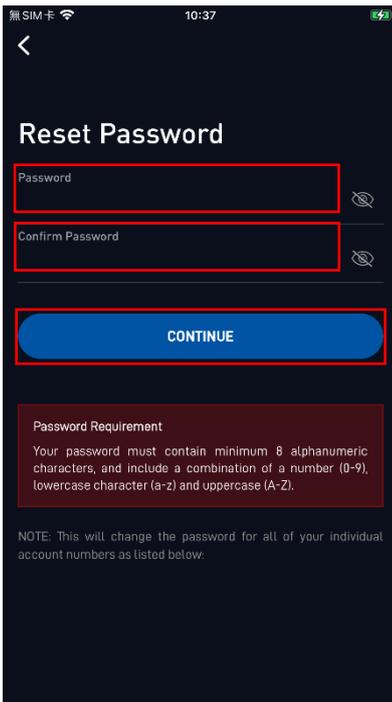


- 1) Enter the **Mobile No.**, **Password**, and click **LOGIN**.
- 2) Digital Token will be **verified automatically** when logging in with the same device.
- 3) The **main page** shows up when login successfully.

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

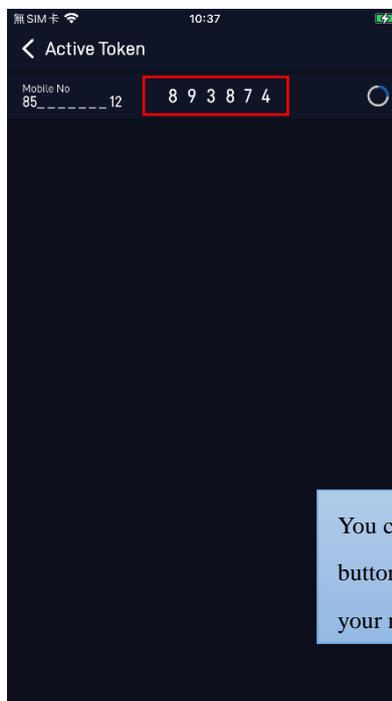
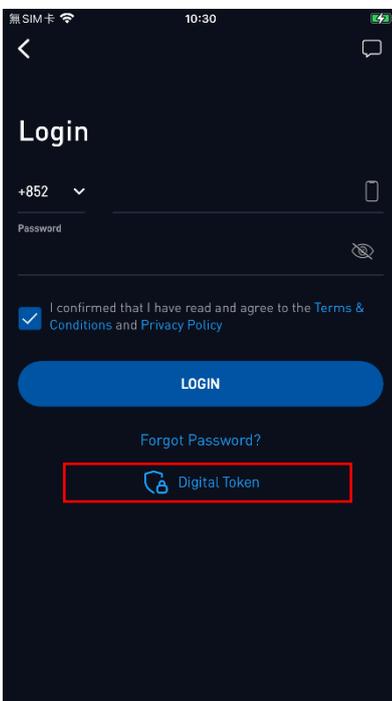


- 1) Enter the **Mobile No.** and click **RESET PASSWORD**.
- 2) Enter the **SMS Verification Code**.
- 3) Enter the **Account Number**, **ID No** and click **CONTINUE**



- 4) Enter the new **Password**, **Confirm Password** and click “**CONTINUE**”.
- 5) 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.



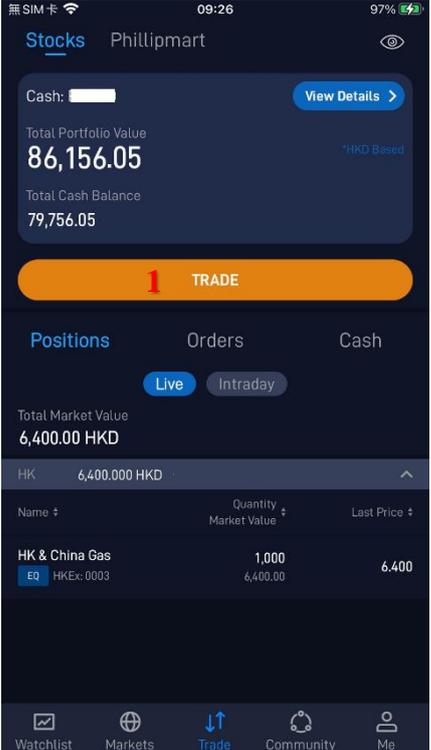
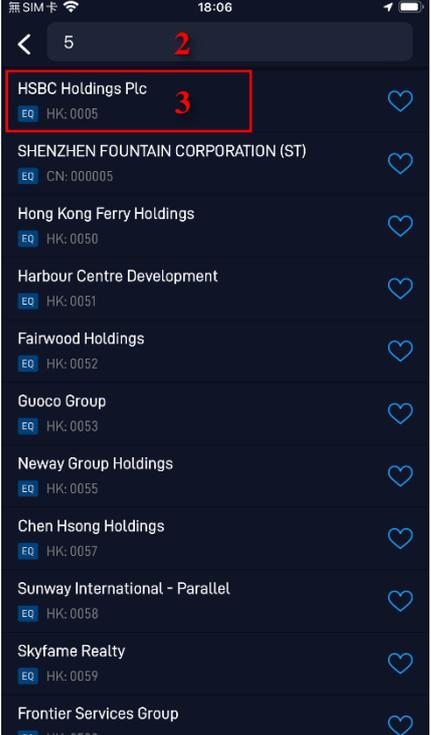
You could click the “**Click Here**” button to enable Digital Token on your new device.

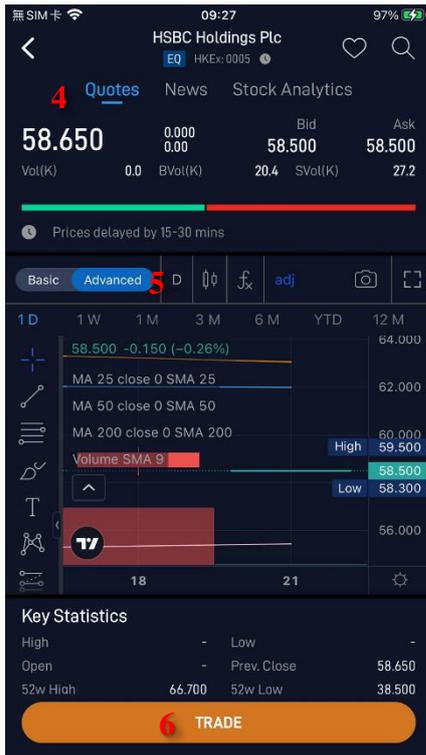
- 1) Click the “**Digital Token**” on the bound device.
- 2) Generate the **6-digit security code**.
- 3) Enter the 6-digit security code on the choosing device to access your account.

3. Functions

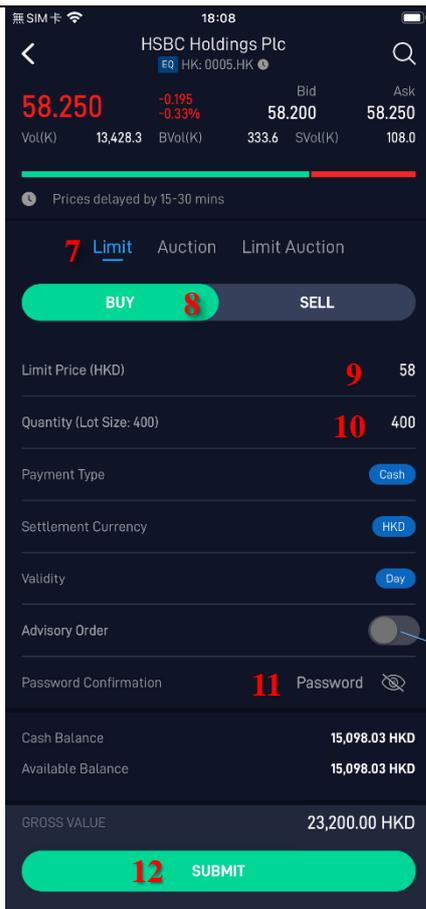
A. Trade

i. Place Order

 <p> 無SIM卡 09:26 97% Stocks Phillipmart Cash: [] View Details > Total Portfolio Value 86,156.05 *HKD Based Total Cash Balance 79,756.05 1 TRADE Positions Orders Cash Live Intraday Total Market Value 6,400.00 HKD HK 6,400.00 HKD Name ↓ Quantity Market Value Last Price ↓ HK & China Gas 1,000 6,400.00 6.400 EQ HKEx: 0003 Watchlist Markets Trade Community Me </p>	<p>1) Click “TRADE”.</p>
 <p> 無SIM卡 18:06 < 5 2 HSBC Holdings Plc 3 EQ HK: 0005 SHENZHEN FOUNTAIN CORPORATION (ST) EQ CN: 000005 Hong Kong Ferry Holdings EQ HK: 0050 Harbour Centre Development EQ HK: 0051 Fairwood Holdings EQ HK: 0052 Guoco Group EQ HK: 0053 Neway Group Holdings EQ HK: 0055 Chen Hsong Holdings EQ HK: 0057 Sunway International - Parallel EQ HK: 0058 Skyfame Realty EQ HK: 0059 Frontier Services Group EQ HK: 0500 </p>	<p>2) Enter the Stock Code or Stock Name to search stocks.</p> <p>3) Select the required stock. (E.g. HSBC Holdings Plc HK:0005)</p>

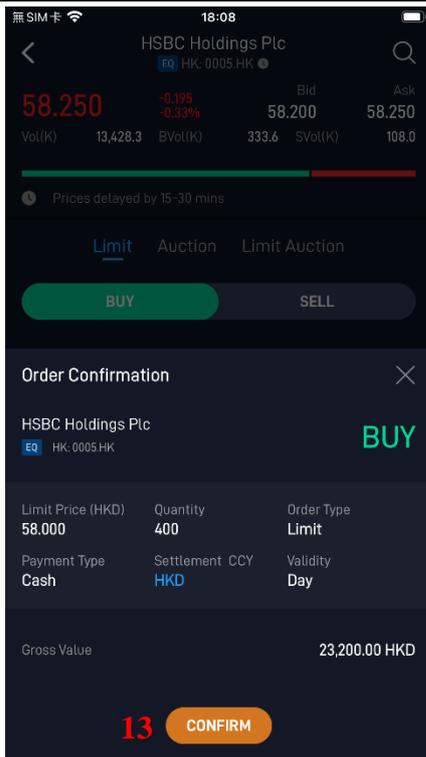


- 4) Market data. (Prices will be delayed by at least 15 minutes for non-Realtime Teletext user)
- 5) Technical Analysis. You could select Basic Version or Advanced Version.
- 6) Click “TRADE” to enter to trading page.

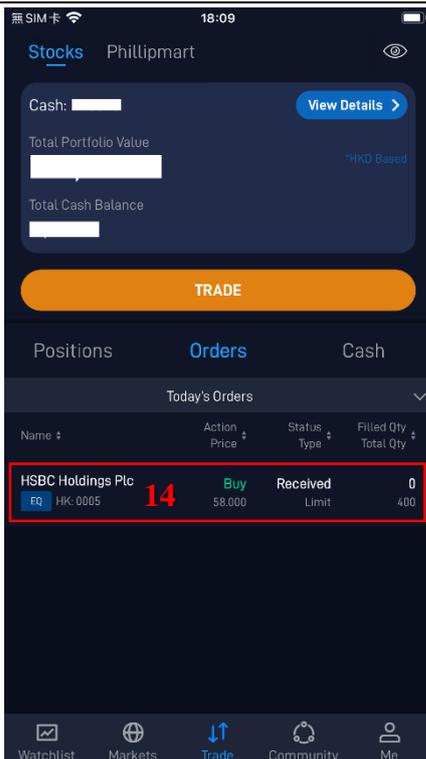


- 7) Select Order Type, “Limit Order”, “Auction Order” or “Limit Auction Order”.
- 8) Select “BUY” or “SELL”.
- 9) Enter Order Price.
- 10) Enter Order Quantity.
- 11) Enter Password.
- 12) Click “SUBMIT”.

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.



13) Click “CONFIRM” to submit the order after confirmation.



14) Order status can be checked in order list after submitted successfully.

Received - The order has been accepted.

Pending - Order is pending for approval.

Done - Order is fully done.

Partially Done - Order is filled partially, the rest is still in queue.

Withdrawn - Order is successfully withdrawn.

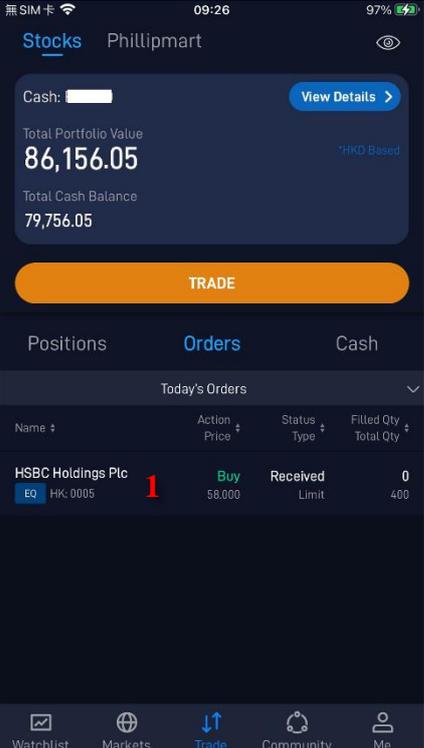
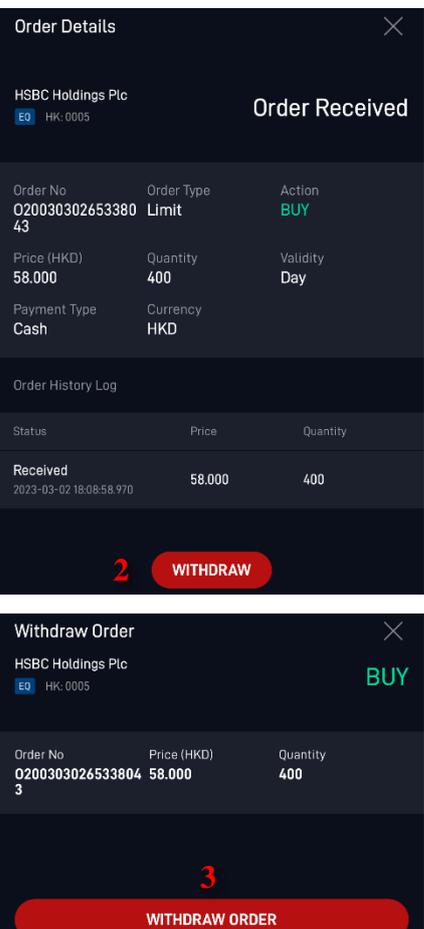
Pending Withdrawn - The order is pending to cancel.

Partially Withdrawn - Order is part filled, the rest is successfully withdrawn.

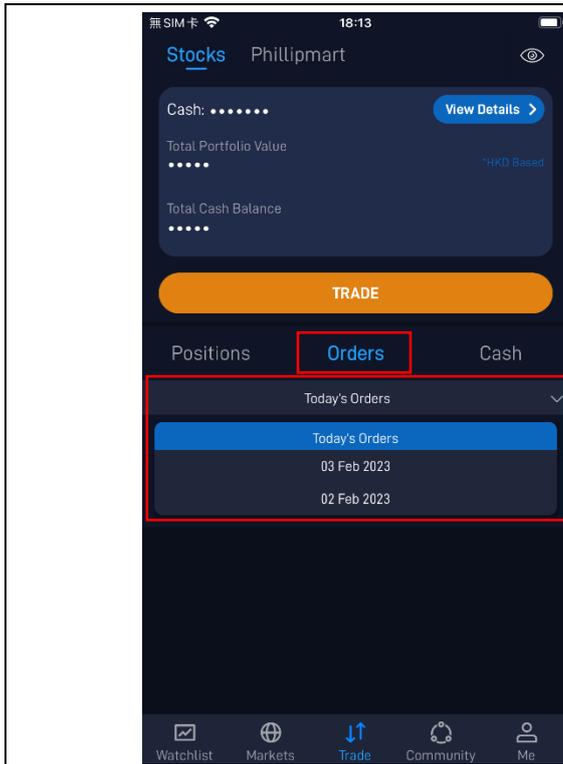
Amend - Order is successfully amended.

Rejected - Order has been rejected. Please contact your account executive for further enquiries.

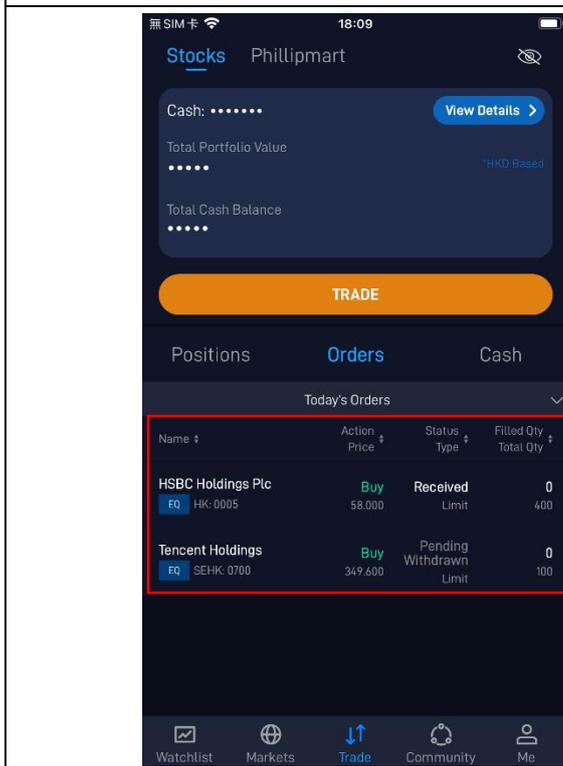
ii. Withdraw Order

	<p>Orders can be withdrawn if order status is not done.</p> <ol style="list-style-type: none"> 1) Select the order you are required to withdraw.
	<ol style="list-style-type: none"> 2) View order detail and click “WITHDRAW” to continue. 3) Click “WITHDRAW ORDER” for confirmation.

iii. Order Status



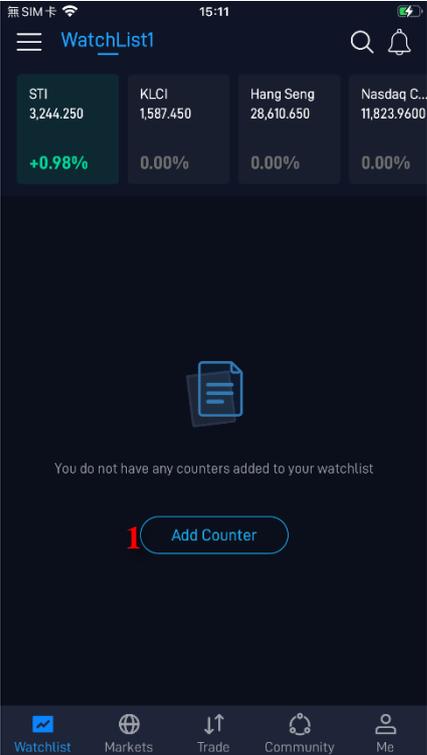
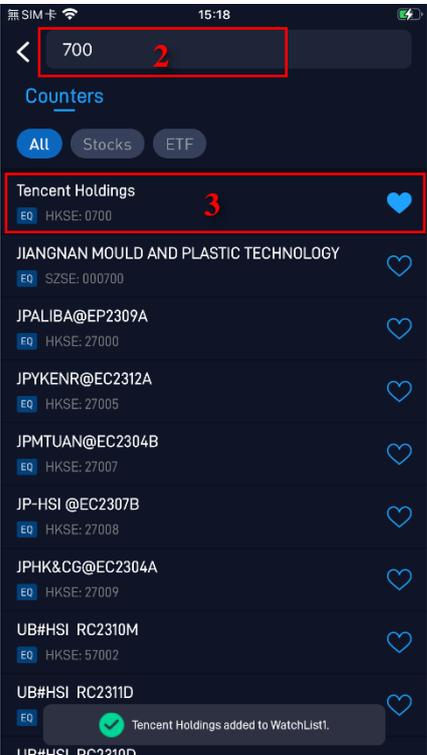
The **【Orders】** is available to view order records of latest 5 working days.



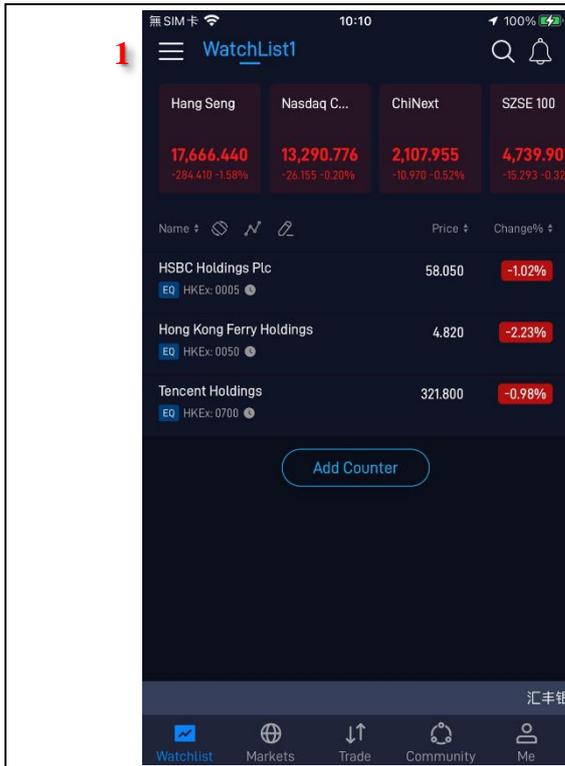
View orders status.

B. Watchlist

i. Adding Stock to Watchlist

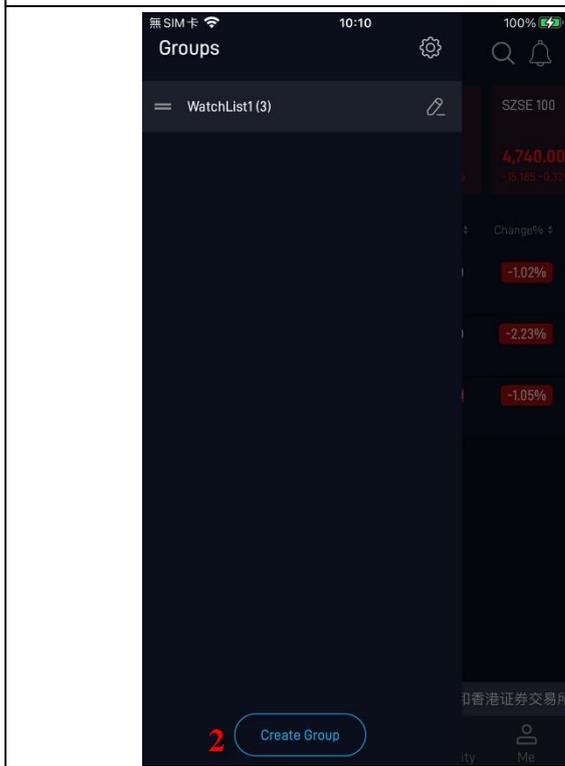
	<p>1) Click “Add Counter” at main page of Watchlist.</p>
	<p>2) Enter Stock Code or Stock Name to search.</p> <p>3) The Stock will be added to the related Watchlist when you press “❤️” on the right side.</p>

ii. Edit WatchList

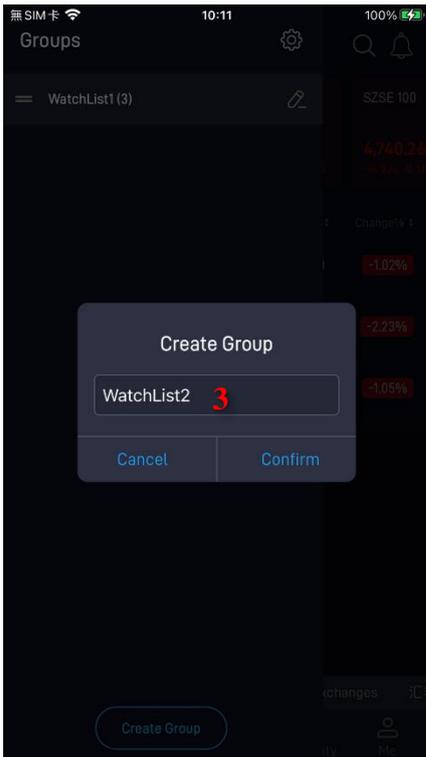


【Create Group】

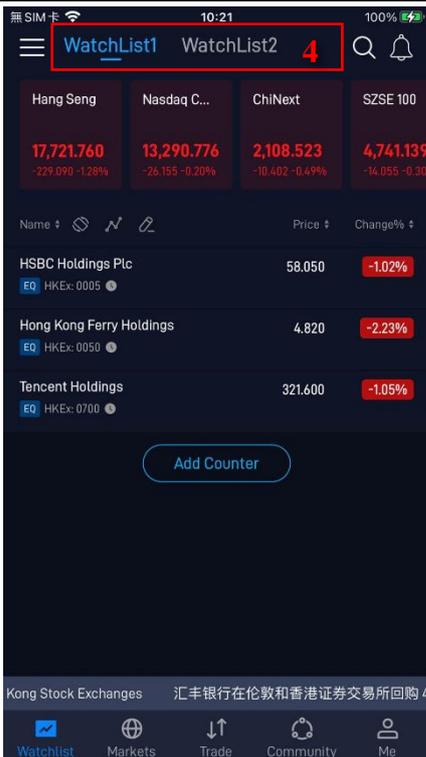
1) Click “” at the upper-left corner.



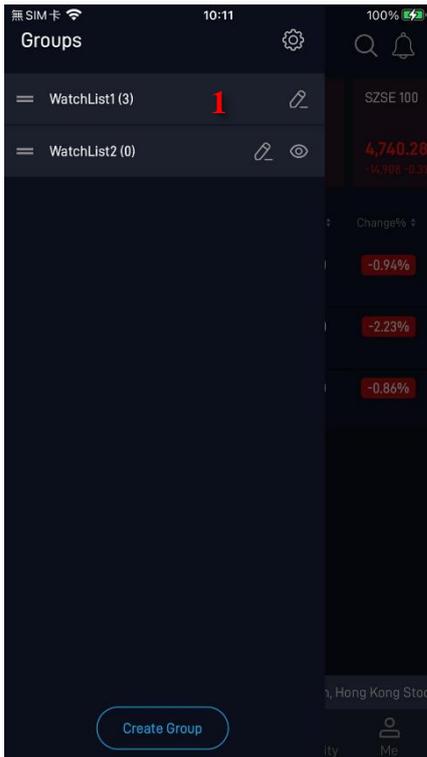
2) Click “Create Group”.



3) Define the group name and click “Confirm” to create new Watchlist group.

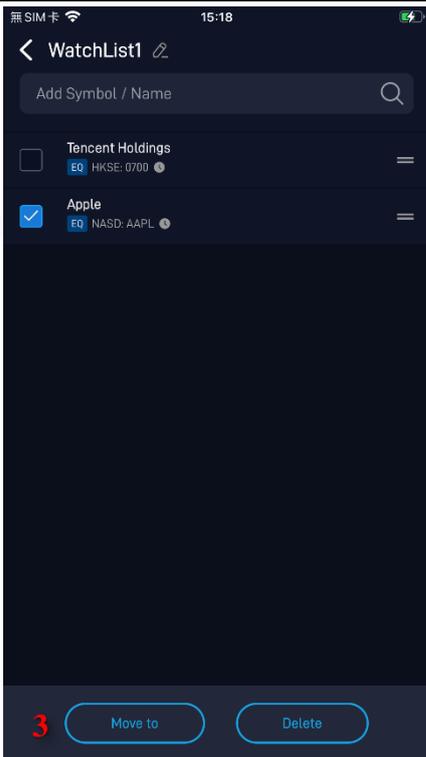


4) Tap the name of the watchlist and switch to the required list.



【Edit WatchList】

1) Click “” at the right of the watchlist.



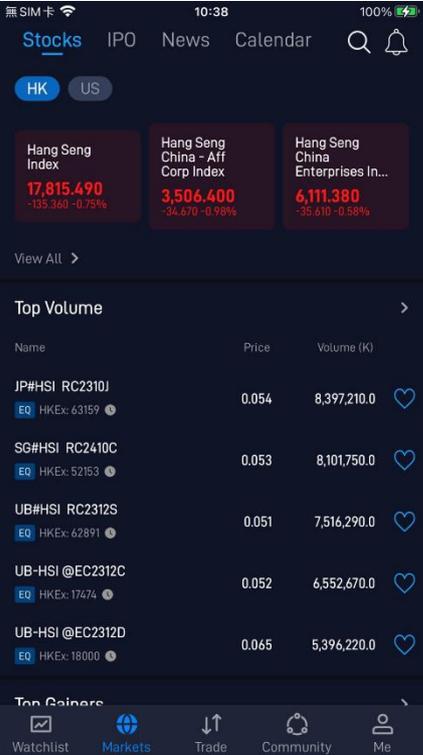
2) Check the Stock you are required to edit.

3) **Move to**: Move the selected stock to another watchlist group.

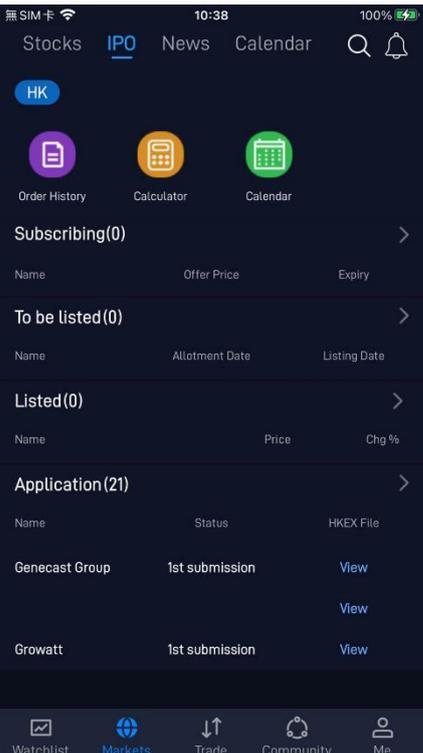
Delete: Delete the selected stock from the watchlist.

C. Markets

i. Stocks

 <p>The screenshot shows the 'Stocks' app interface. At the top, there are tabs for 'Stocks', 'IPO', 'News', and 'Calendar'. Below these are buttons for 'HK' and 'US'. Three market indices are displayed: Hang Seng Index (17,815.490, -0.75%), Hang Seng China - Aff Corp Index (3,506.400, -0.98%), and Hang Seng China Enterprises In... (6,111.380, -0.58%). Below the indices is a 'Top Volume' section with a table of stocks:</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Price</th> <th>Volume (K)</th> </tr> </thead> <tbody> <tr> <td>JP#HSI RC2310J</td> <td>0.054</td> <td>8,397,210.0</td> </tr> <tr> <td>SG#HSI RC2410C</td> <td>0.053</td> <td>8,101,750.0</td> </tr> <tr> <td>UB#HSI RC2312S</td> <td>0.051</td> <td>7,516,290.0</td> </tr> <tr> <td>UB-HSI @EC2312C</td> <td>0.052</td> <td>6,552,670.0</td> </tr> <tr> <td>UB-HSI @EC2312D</td> <td>0.065</td> <td>5,396,220.0</td> </tr> </tbody> </table> <p>At the bottom, there is a 'Top Gainers' section and a navigation bar with icons for Watchlist, Markets, Trade, Community, and Me.</p>	Name	Price	Volume (K)	JP#HSI RC2310J	0.054	8,397,210.0	SG#HSI RC2410C	0.053	8,101,750.0	UB#HSI RC2312S	0.051	7,516,290.0	UB-HSI @EC2312C	0.052	6,552,670.0	UB-HSI @EC2312D	0.065	5,396,220.0	<p>Stay informed the latest market information, including the Top Volume, Top Gainers, Top Losers of HK or US market.</p>
Name	Price	Volume (K)																	
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UB-HSI @EC2312D	0.065	5,396,220.0																	

ii. IPO

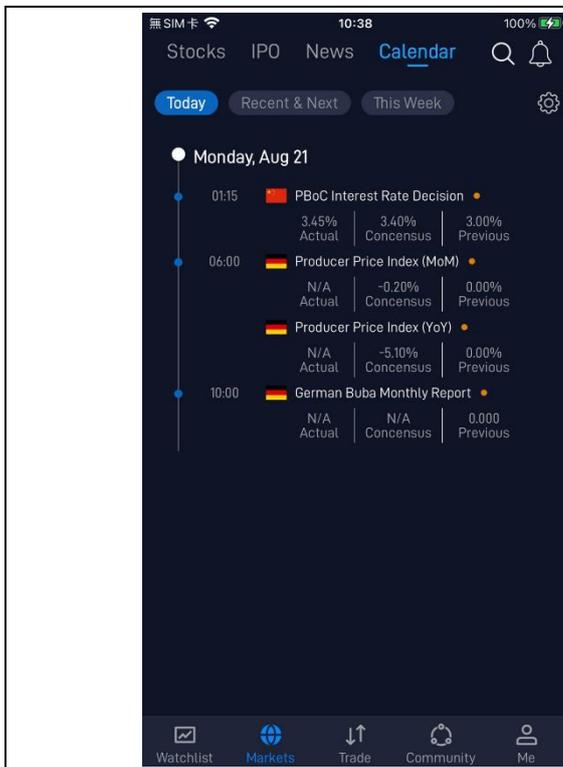
 <p>The screenshot shows the 'IPO' app interface. At the top, there are tabs for 'Stocks', 'IPO', 'News', and 'Calendar'. Below these are buttons for 'HK' and 'US'. Three icons are displayed: Order History, Calculator, and Calendar. Below the icons are sections for 'Subscribing(0)', 'To be listed(0)', 'Listed(0)', and 'Application (21)'. The 'Application (21)' section contains a table of IPO applications:</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Status</th> <th>HKEX File</th> </tr> </thead> <tbody> <tr> <td>Genecast Group</td> <td>1st submission</td> <td>View</td> </tr> <tr> <td></td> <td></td> <td>View</td> </tr> <tr> <td>Growatt</td> <td>1st submission</td> <td>View</td> </tr> </tbody> </table> <p>At the bottom, there is a navigation bar with icons for Watchlist, Markets, Trade, Community, and Me.</p>	Name	Status	HKEX File	Genecast Group	1st submission	View			View	Growatt	1st submission	View	<p>IPO information. Such as subscribing IPO, offer price, expiry day, to be listed and listed IPO. You could view your IPO subscription history, calculate the pay amount, margin interest and so on.</p>
Name	Status	HKEX File											
Genecast Group	1st submission	View											
		View											
Growatt	1st submission	View											

iii. News



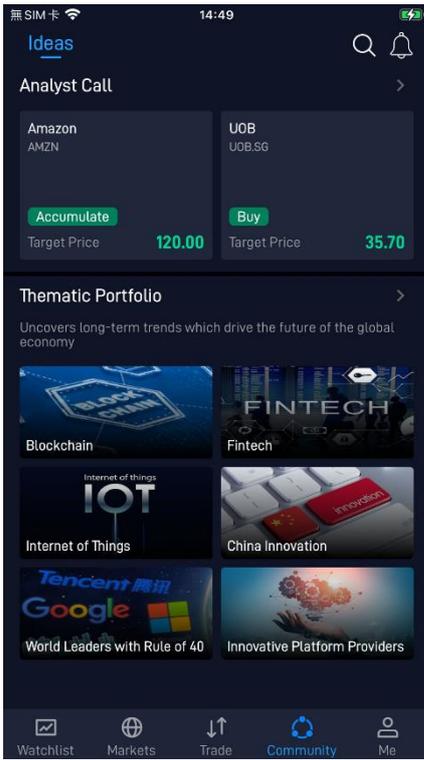
To access the latest news of various markets and products, you will have your finger on the pulse of what's happening in the market to better capture investment opportunities.

iv. Calendar



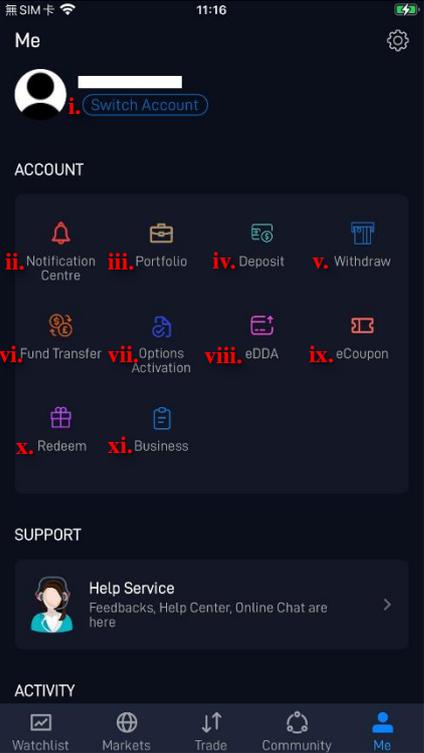
To view event schedule of different countries. Such as Bond Auctions, Capital Flows, Economic Activity, Holidays and so on.

D. Community



* The Community is coming soon - stay tuned!

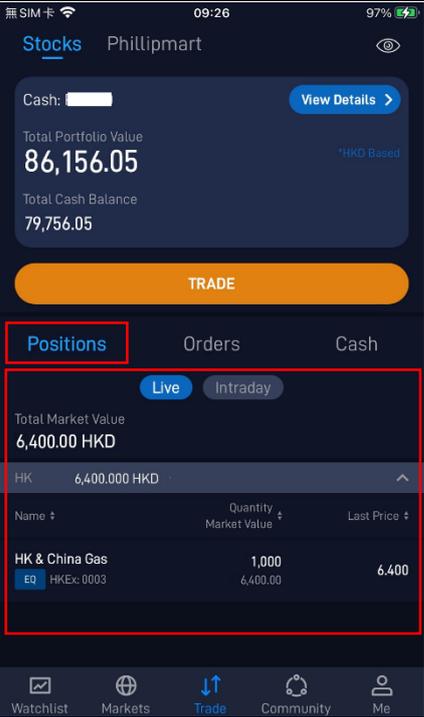
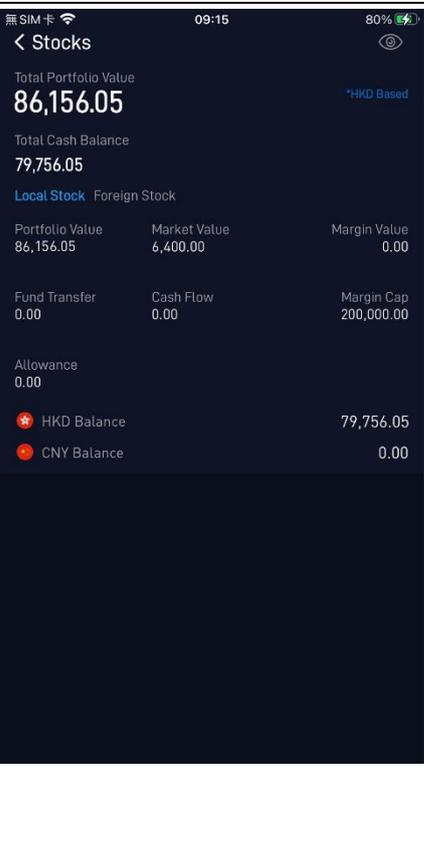
E. Me

	<p>You could handle your business via 「ME」 tab.</p> <ol style="list-style-type: none"> i. Switch Account - Switch to another account ii. Notification Centre - View notification iii. Portfolio - Account position and balance iv. Deposit - Upload deposit slip v. Withdraw - Cash withdrawal vi. Fund Transfer - Fund transfer among products vii. Options Activation - Option account opening viii. eDDA - Deposit via eDDA ix. eCoupon - E-Coupon redeem x. Redeem - POEMS point exchange xi. Business - Application forms
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ii. Notification Centre

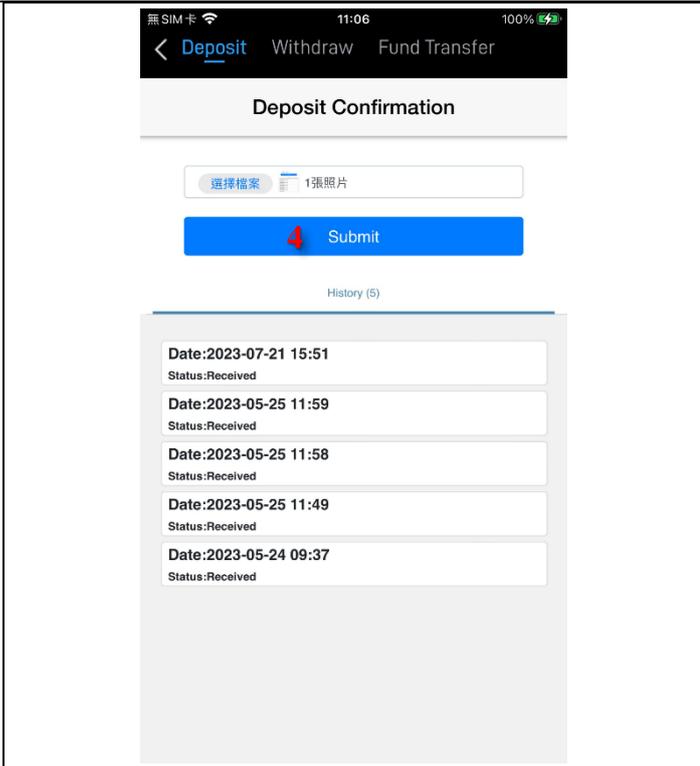
	<p>The Notification Centre will push messages of Phillip announcement, promotion, order confirmation, order status reminder and so on.</p>
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iii. Portfolio

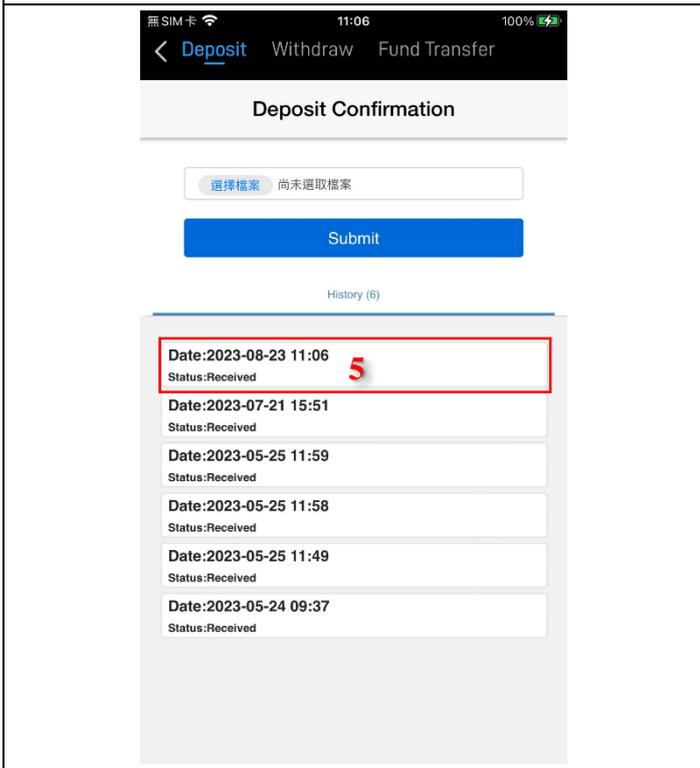
	<p>【Positions】</p> <p>Positions of Local Stock and Foreign Stock. Including the stock name, stock quantity, last price, market value of each stock and total market value. The tab can be selected to view positions of live or Intraday.</p> <p>Live - All positions. Intraday - Positions of the day.</p>
	<p>【Balance】</p> <p>View account portfolio value and cash balance. For more details, please click “View Details”.</p>
	<p><u>Total Portfolio Value</u>: Total market value and cash balance of Local Stock and Foreign Stock.</p> <p><u>Total Cash Balance</u>: Cash Balance of Local Stock and Foreign Stock. (*HKD Based)</p> <p><u>Market Value</u>: The total value of your portfolio. (calculate by market price)</p> <p><u>Margin Value</u>: The margin value of your portfolio.</p> <p><u>Fund Transfer</u>: Net balance of temporary funds of deposits, withdrawal and fund transfer of the day.</p> <p><u>Cash Flow</u>: Cash flow balance of intraday trading.</p> <p><u>Margin Cap</u> - The maximum amount that can be pledged for stock and used as a financing transaction.</p> <p><u>Allowance</u>: The amount allows for using a loan for stock trading and based on client financial situation.</p> <p><u>HKD Balance</u>: Cash balance of HKD.</p> <p><u>CNY Balance</u>: Cash balance of CNY.</p> <p>* Above Market Value, Margin Value and Allowance is for reference only.</p>

iv. Deposit

	<ol style="list-style-type: none"> 1) Click “Select File”. 2) Select upload method.
	<ol style="list-style-type: none"> 3) Choose the deposit slip.

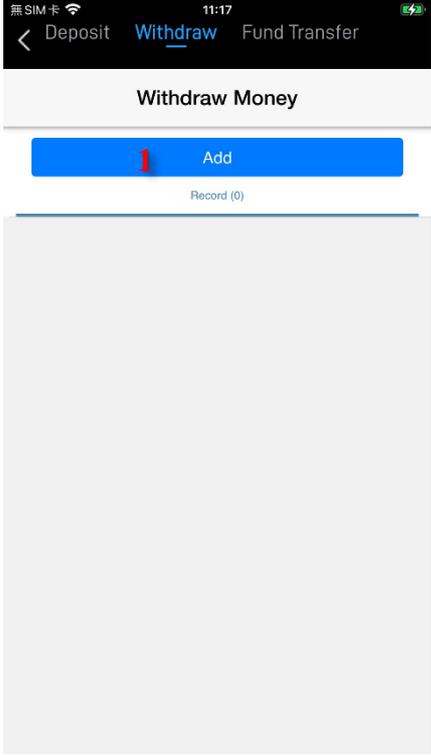
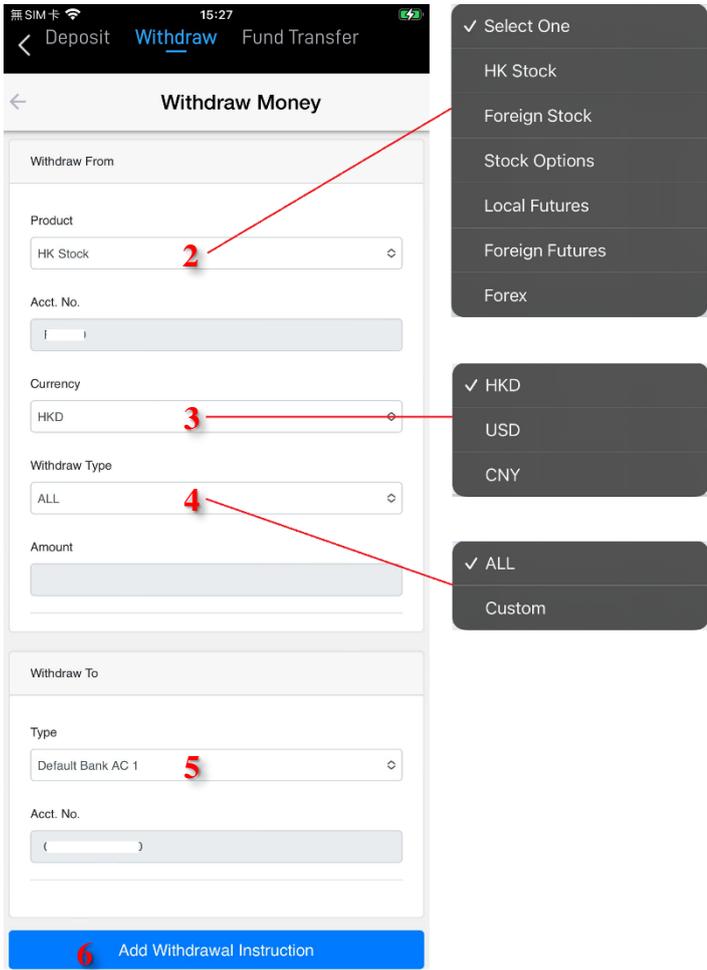


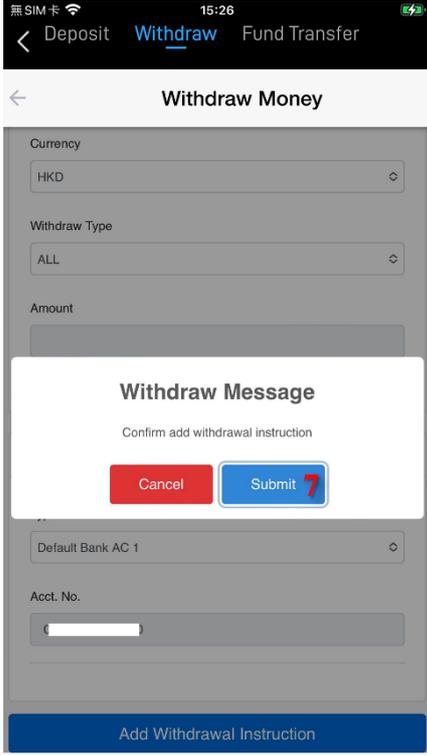
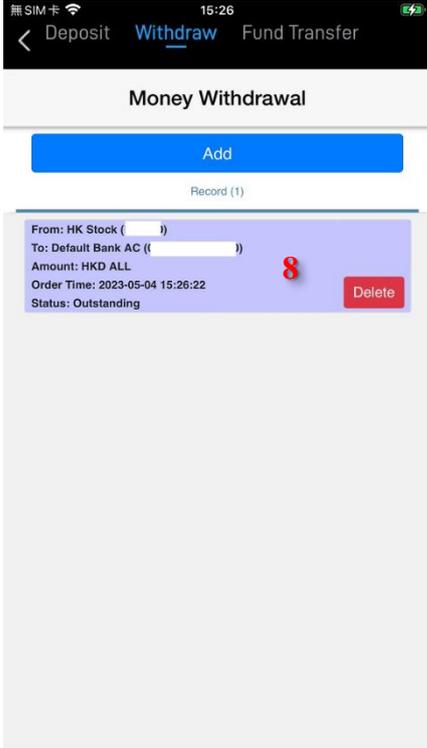
4) Click “Submit” to upload the file.



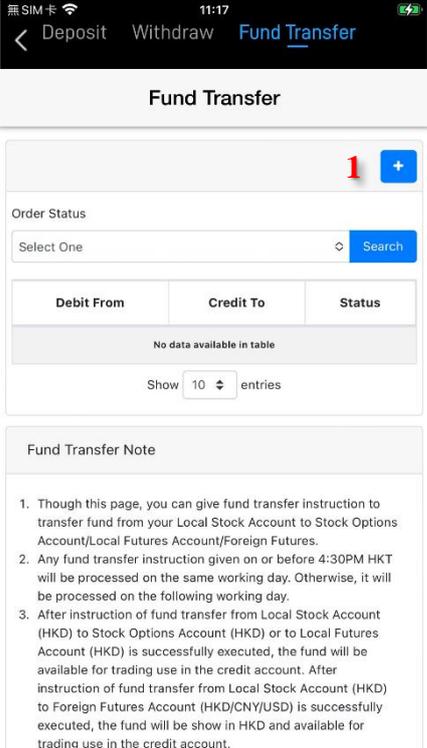
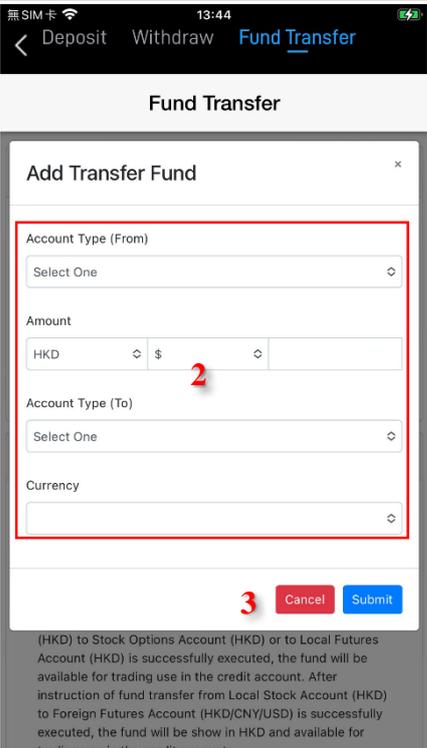
5) The status will be shown as “Received” when uploaded successful. You could view the previous upload history in this page.

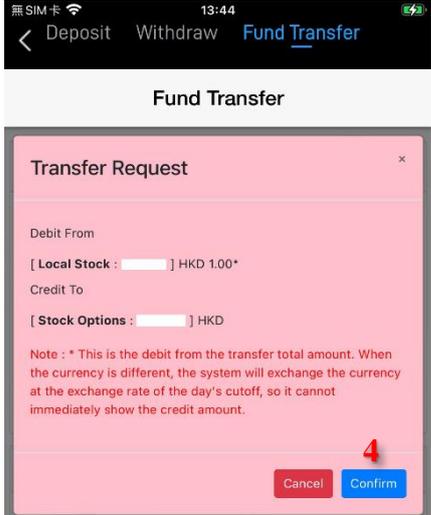
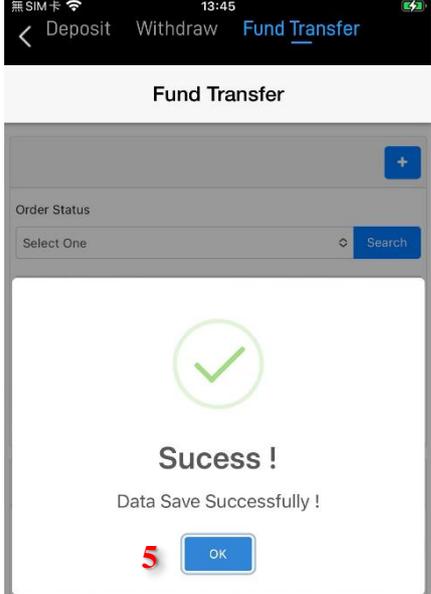
v. Withdraw

	<p>1) Click “Add”.</p>
	<p>2) Select the required product to withdraw money.</p> <p>3) Select the corresponding currency.</p> <p>4) Input amount for withdrawal. Available to select withdraw “ALL” or “Custom” amount.</p> <p>5) Select the beneficiary bank account.</p> <p>6) Click “Add Withdrawal Instruction”.</p>

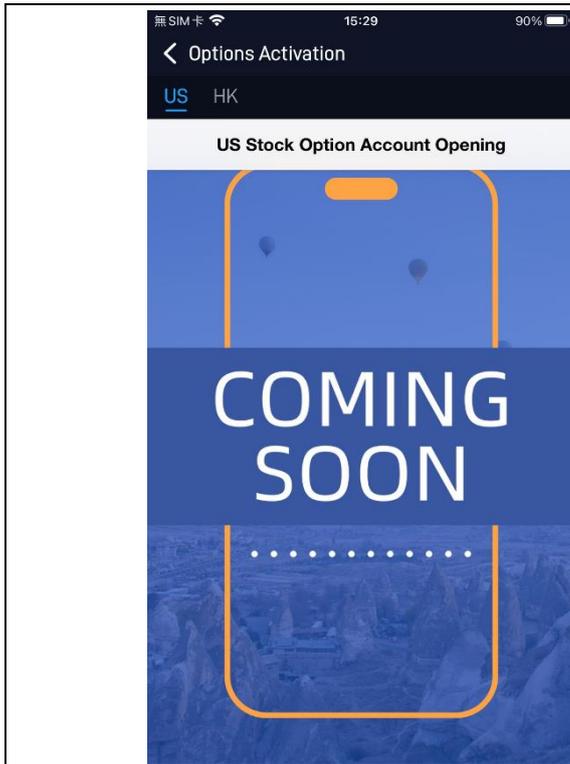
	<p>7) Click “Submit” for confirmation.</p>
	<p>8) Check withdraw information and order status. For order cancellation, you could click “Delete” to cancel the outstanding order.</p>

vi. Fund Transfer

 <p>The screenshot shows the 'Fund Transfer' page. At the top, there are navigation options: 'Deposit', 'Withdraw', and 'Fund Transfer'. Below this is a 'Fund Transfer' header with a red '1' and a blue '+' button. Underneath is an 'Order Status' section with a dropdown menu set to 'Select One' and a 'Search' button. A table with columns 'Debit From', 'Credit To', and 'Status' is shown, but it contains 'No data available in table'. Below the table is a 'Show 10 entries' option. At the bottom, there is a 'Fund Transfer Note' section with three numbered instructions regarding fund transfer procedures and processing times.</p>	<p>1) Click “+”.</p>
 <p>The screenshot shows the 'Add Transfer Fund' dialog box. A red box highlights the input fields: 'Account Type (From)' (dropdown), 'Amount' (with 'HKD' and '\$' selected), 'Account Type (To)' (dropdown), and 'Currency' (dropdown). At the bottom of the dialog, there are 'Cancel' and 'Submit' buttons, with a red '3' next to the 'Submit' button. Below the dialog, there is a note about fund availability and processing times.</p>	<p>2) Input fund transfer information. 3) Click “Submit”.</p>

 <p> Fund Transfer Transfer Request </p> <p>Debit From [Local Stock :] HKD 1.00*</p> <p>Credit To [Stock Options :] HKD</p> <p>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.</p> <p>Cancel Confirm</p> <p>4</p> <ol style="list-style-type: none"> 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 	<p>4) Check fund transfer details and “Confirm” the instruction.</p>
 <p> Fund Transfer </p> <p>Order Status Select One Search</p> <p>  Sucess ! Data Save Successfully ! </p> <p>5 OK</p> <ol style="list-style-type: none"> 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 	<p>5) Fund transfer instruction submitted successfully.</p>

vii. Options Activation



【US Stock Option】

* US Stock Option is coming soon - stay tuned!

1. 你的配偶是否擁有輝立證券的孖展戶口？

是
 否

如是，請輸入配偶姓名

如是，請輸入配偶戶口號碼

2. 你是否個人或與你的配偶共同控制輝立證券的公司孖展客戶 35% 或以上的投票權？

是
 否

如是，請輸入配偶姓名

如是，請輸入配偶戶口號碼

開戶風險聲明

1. 本人/吾等欲使用POEMS電子服務，本人/吾等已經閱讀並明白網上交易協議條款，並接受這些條款的約束

2. 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，並接受這些條款的約束

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/吾等之持仓由期權結算所以結合基礎計算及收取有關之按金

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

5. 本人/吾等已細閱輝立證券（香港）有限公司之客戶協議書中附表三之風險披露聲明內容，如本人/吾等有需要，本人/吾等將發問及尋求獨立意見

6. 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. 本協議書內所載列之個人資料僅用加開期權戶口的申請，客戶個人資料將依據輝立證券（香港）有限公司客戶協議中附表2的個人資料收集聲明來處理

8. 輝立證券（香港）有限公司將收妥閣下申請表后14工作天內以書面形式確認閣下之申請，或以電話形式通知閣下之申請不被接納

我已同意開戶風險聲明及 證券客戶協議。

立即開戶

【HK Stock Option】

- 1) Fill in the Declaration/Acknowledgement of HK Stock Option Account Opening.
 - 2) Check the agreement and click “Submit”.
- (It is required to have Derivatives Knowledge and the level of Risk Profile Questionnaire should be HIGH for opening a stock option account.)

viii. eDDA

Apply eDDA Service

	<p>1) Under the tab named 「Apply Service」, click “+Add New”.</p>
	<p>2) Fill in the form. 3) Read and agree with terms and conditions. 4) Click “Submit”.</p>

- 5) Confirm the submitted details are the same with the registered bank account, and click “OK”.
- 6) Enter PHK Key and click “OK” to submit the application.

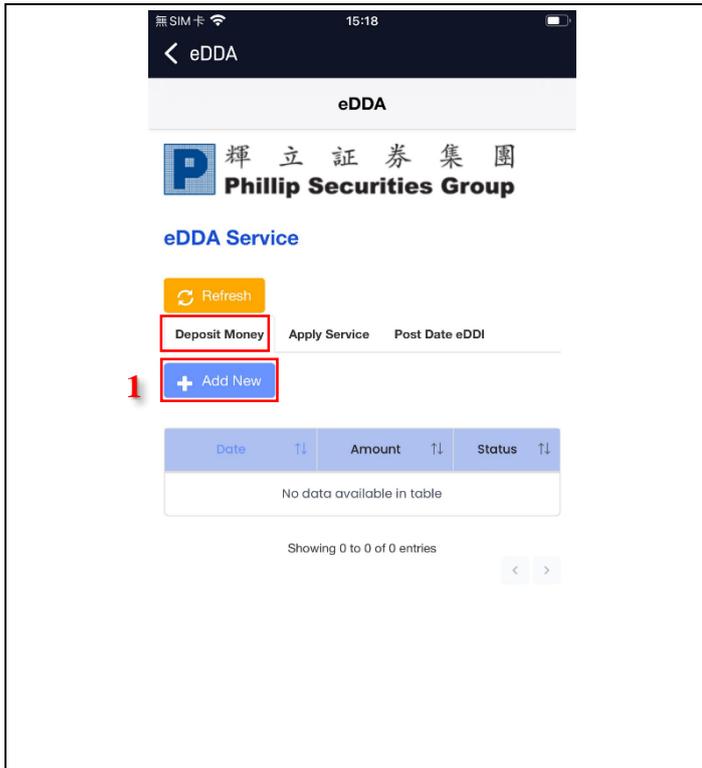
Date	Product A/C	Status
2021-03-22 12:33	Local Stock	Active

- 7) A new record will be shown in the table under the tab 「Apply Service」.

* eDDA application status:

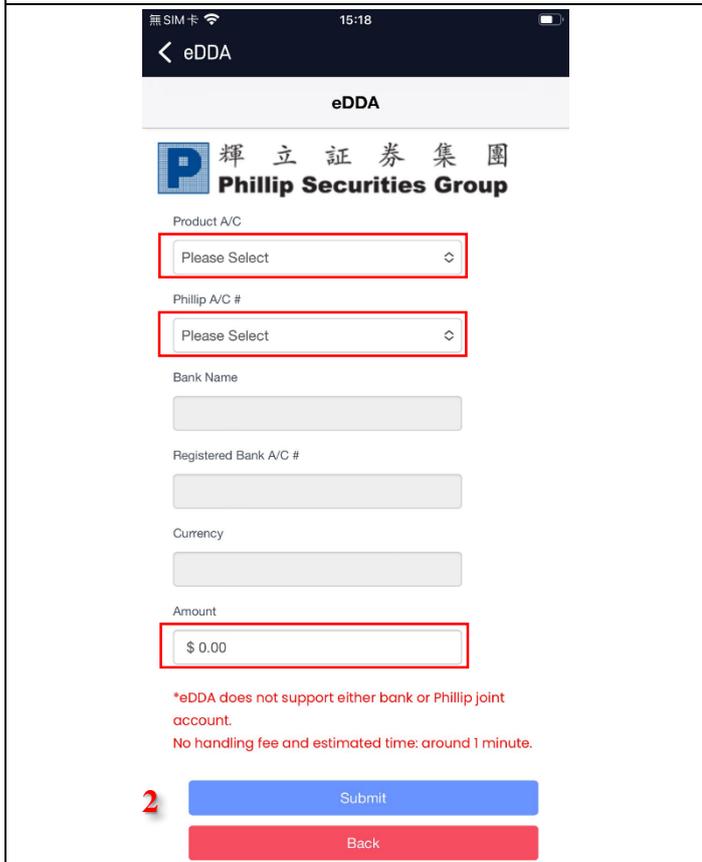
Active	The eDDA has been set up successfully, you may now start making a deposit through eDDA to your Phillip account.
Pending	The instruction will be effective shortly (Subject to the processing time of designated bank). Please wait patiently.
Reject	The eDDA cannot be set up, please try it again or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

 eDDA Deposit

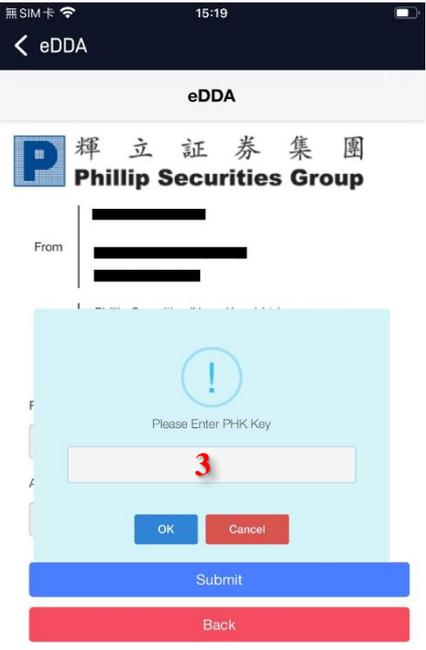
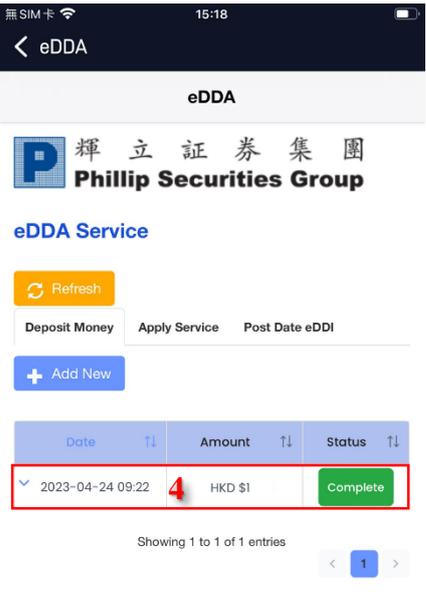


1) Under the tab named 「Deposit Money」, click “+ Add New”.

(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.)



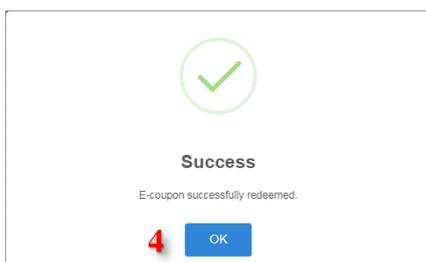
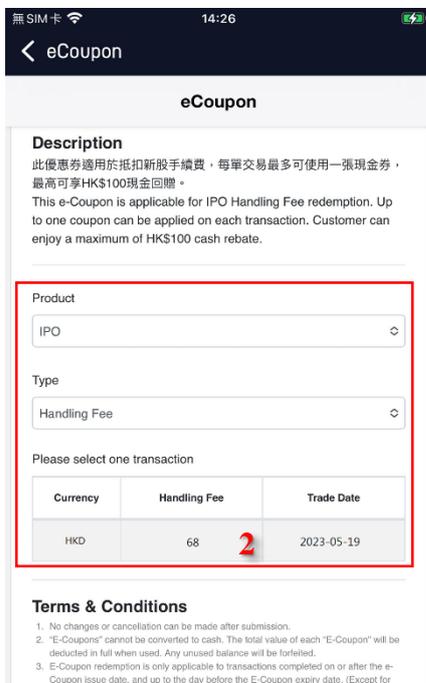
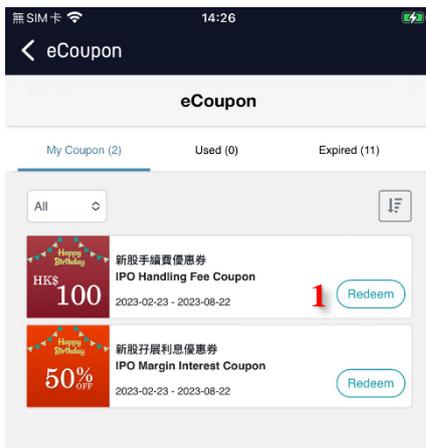
2) Fill in the form, and click “Submit”.

	<p>3) After confirming details input are correct, please enter PHK Key and click “OK”.</p>
	<p>4) In the dashboard, a new record will be shown in the table. More information can be seen by pressing the arrow.</p>

* eDDA deposit status:

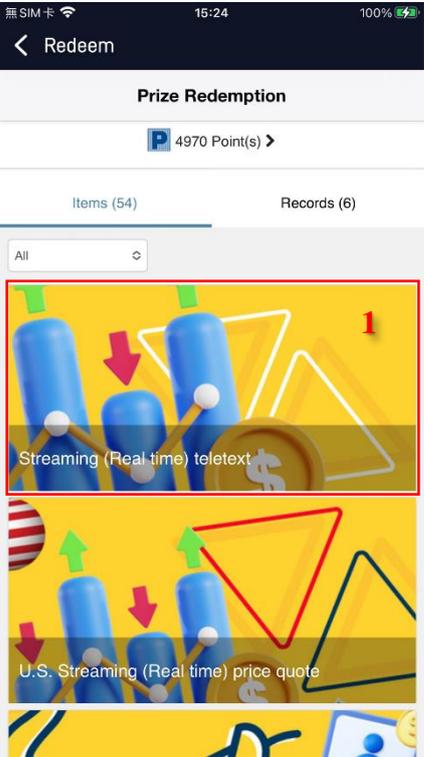
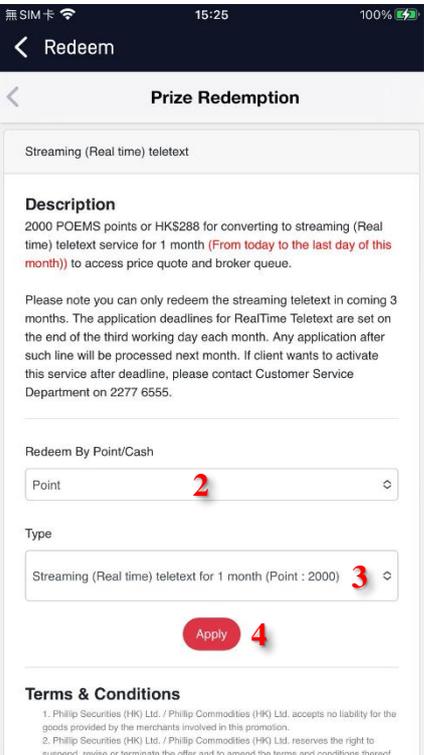
<p>Active</p>	<p>The amount has been deposit to Phillip successfully, you may now start trading with the new money (The amount will reflect in HK Stock > Teletext > Position > Fund Trf).</p>
<p>Pending</p>	<p>The deposit is on its way, please wait patiently.</p>
<p>Reject</p>	<p>The deposit cannot be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

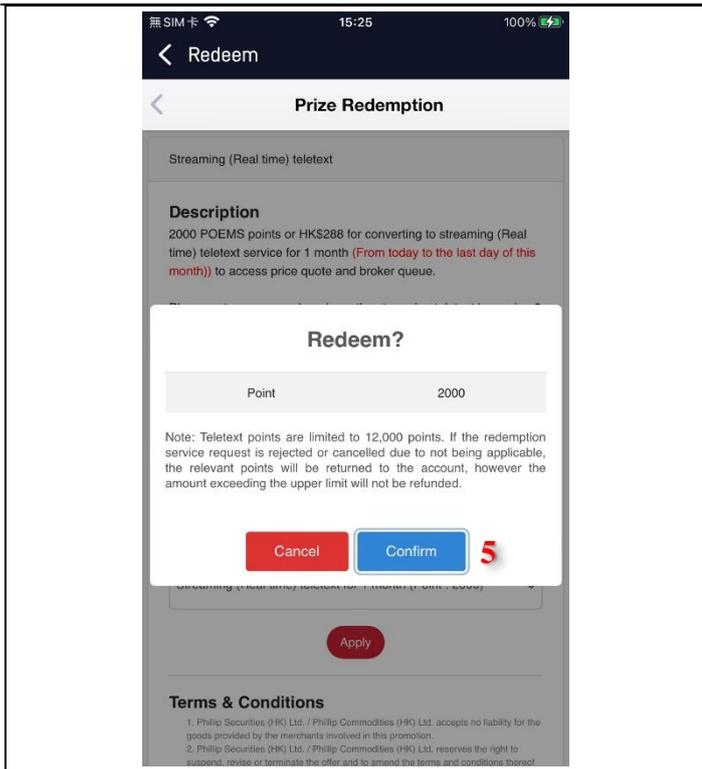
ix. eCoupon



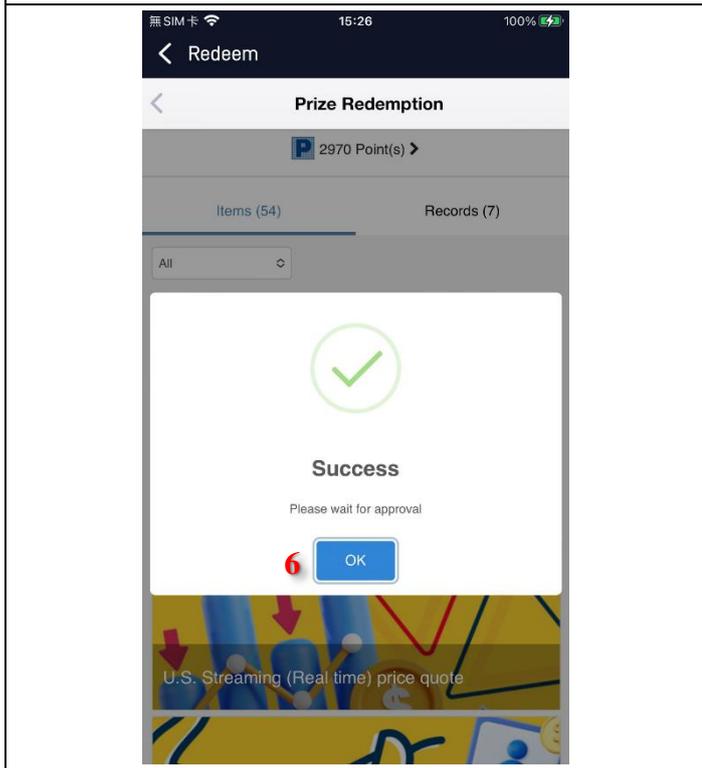
- 1) Select the required e-coupon and click “Redeem” button at the bottom right of the e-coupon.
- 2) Select “Product” > “Type” > “One of the transactions”.
- 3) Click “Confirm” to redeem the e-coupon.
- 4) E-coupon redeemed successfully.

x. Redeem

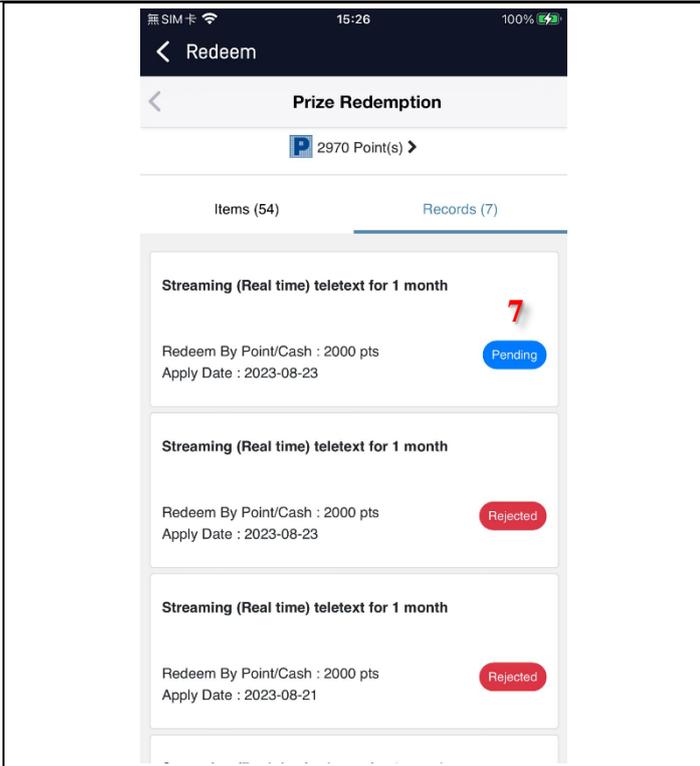
	<p>1) Select the service you would like to exchange.</p>
	<p>2) Select redeem by point or cash. 3) Select the type of the service. 4) Click “Apply”.</p>



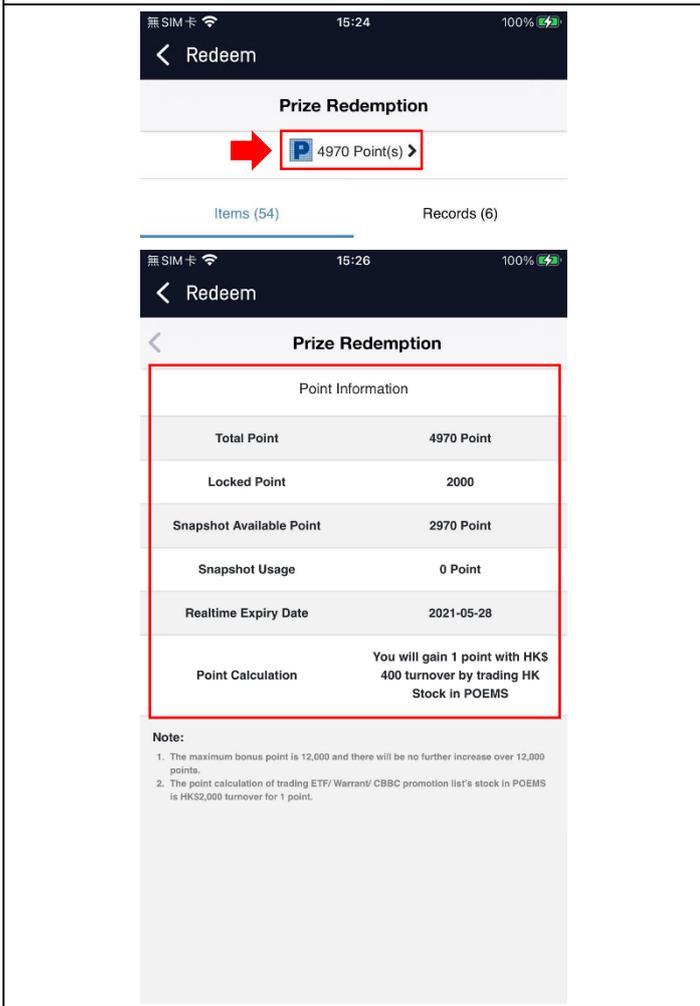
5) Click “Confirm” to redeem the service.



6) Redemption successful.

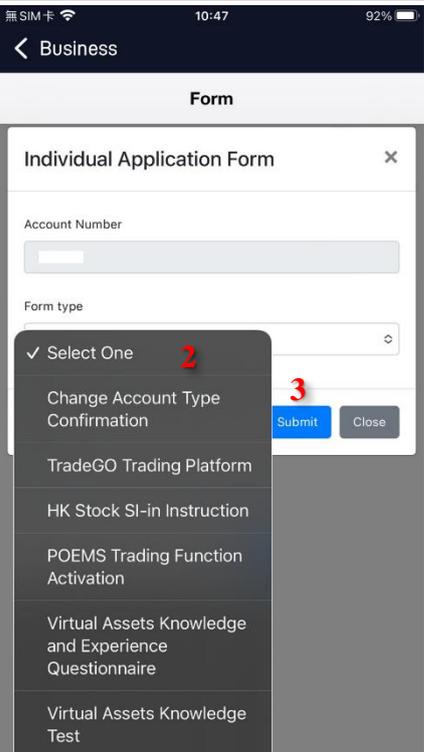


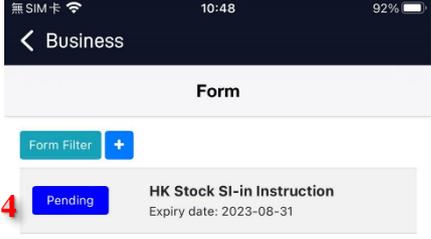
7) The redeem records and status can be viewed in tab “Records”.



【Point Information】
Total Point: Total point
Locked Point: The point which is redeemed service and pending for processing
Snapshot Available Point: Remain available point
Snapshot Usage: Used point of the month
Realtime Expiry Date: Realtime teletext expiry date.
Point Calculate: Point calculation method.

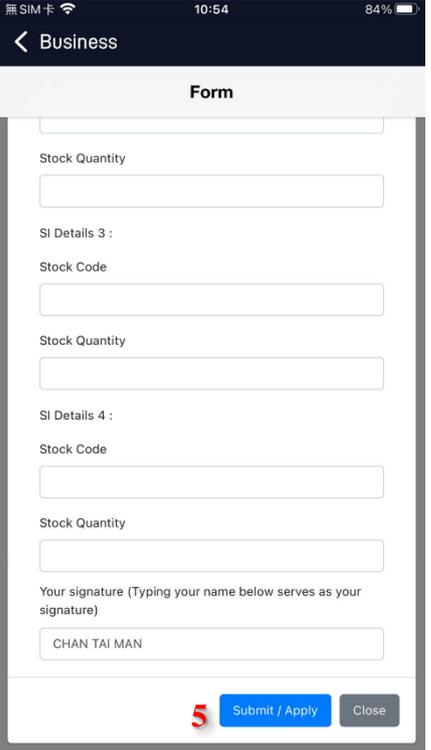
xi. Business

	<p>1) Click “+” to add form.</p>
	<p>2) Select the form. (Please contact Customer Service at 2277 6555 or email to cs@phillip.com.hk if you would like to require other application forms.)</p> <p>3) Click “Submit” to add form.</p>



The screenshot shows a mobile app interface with a dark header 'Business' and a 'Form' section. A red '4' is overlaid on a blue 'Pending' button next to the form entry 'HK Stock SI-in Instruction' with an expiry date of 2023-08-31.

4) Click “Pending”, you may enter to the form.



The screenshot shows the 'Form' details page with input fields for 'Stock Quantity', 'SI Details 3 : Stock Code', 'SI Details 4 : Stock Code', and a signature field containing 'CHAN TAI MAN'. A red '5' is overlaid on the 'Submit / Apply' button at the bottom.

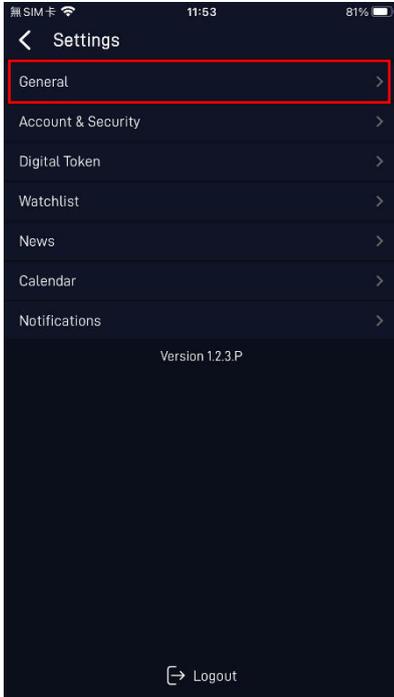
5) Fill in the form with your signature and click “Submit/Apply” to submit the form.

* Form Status:

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

4. Setting

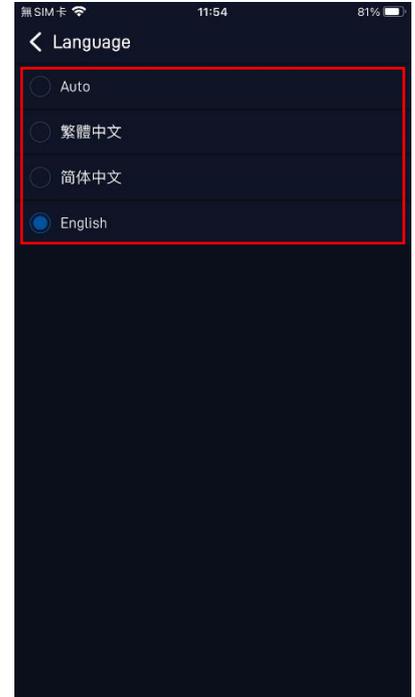
A. Language



1) “General”.

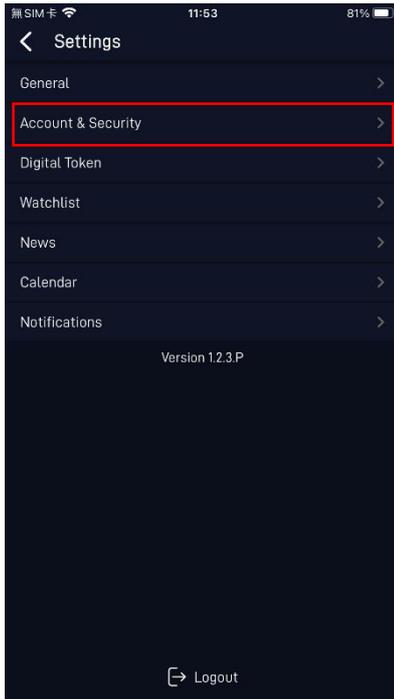


2) “Language”.

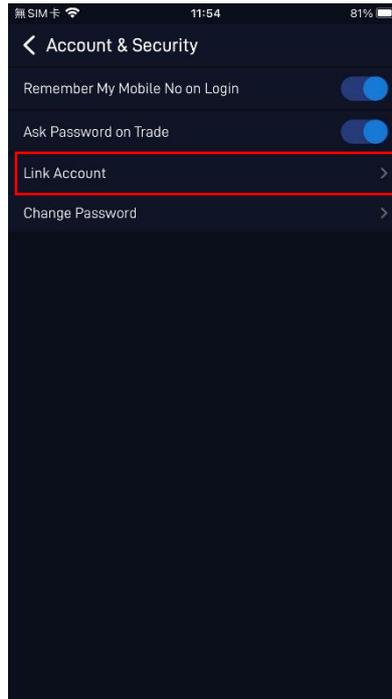


3) Choose your preferred language.

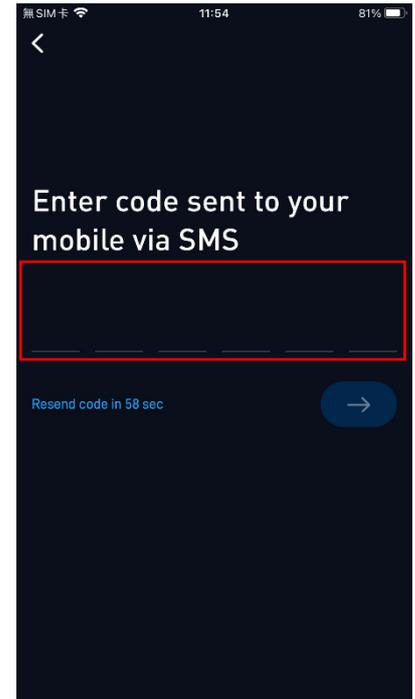
B. Link Account



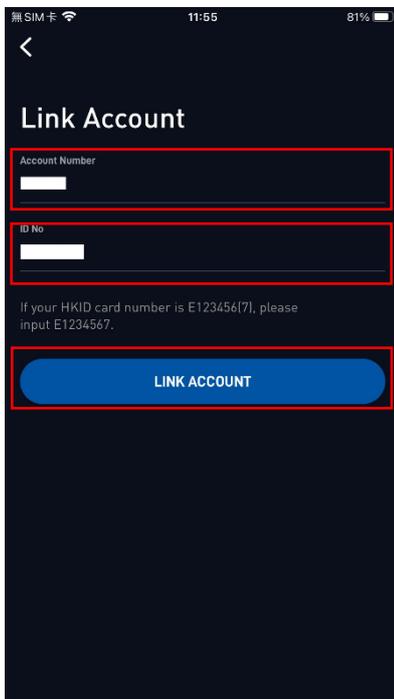
1) “Account & Security”.



2) “Link Account”.

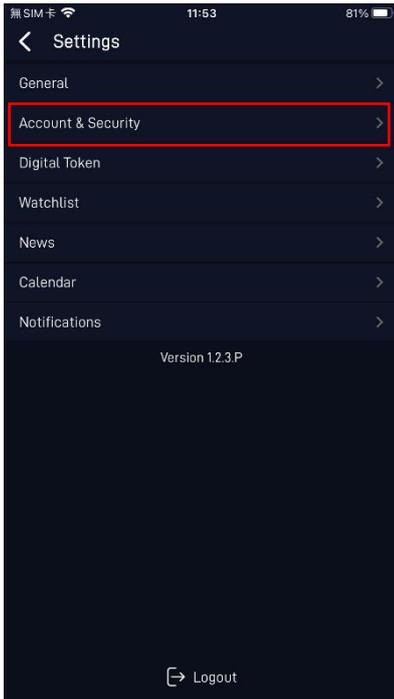


3) Enter the **SMS verification code**.

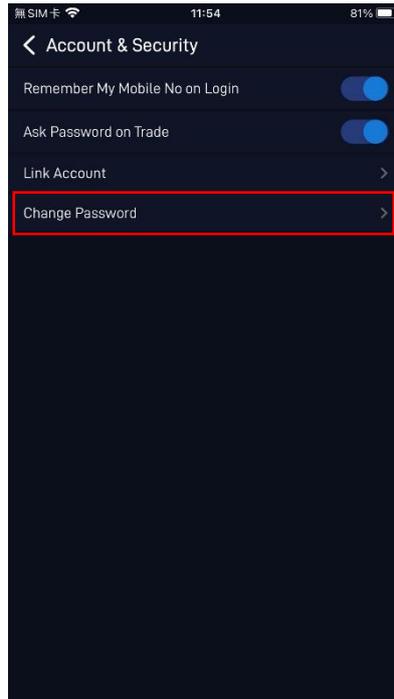


4) Enter your **Phillip Account Number, ID No.**, and click “**LINK ACCOUNT**”.

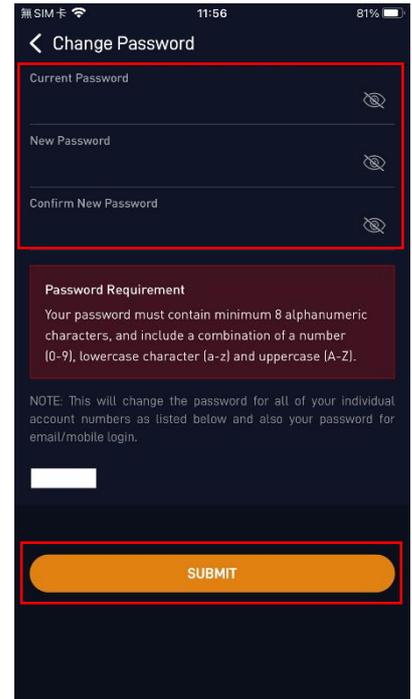
C. Change Password



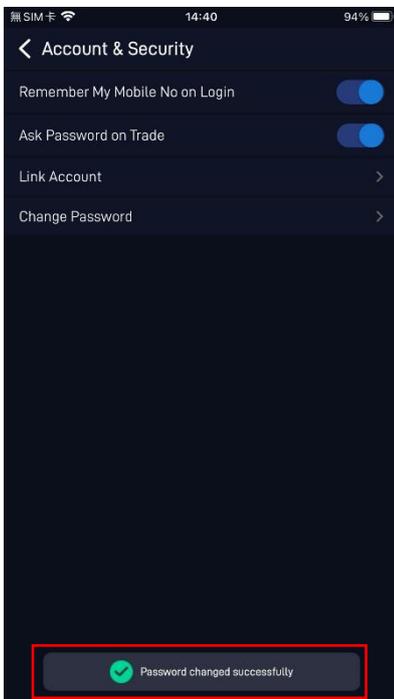
1) “Account & Security”.



2) “Change Password”.



3) Enter the **Current Password**, **New Password**, **Confirm New Password**, and click “**SUBMIT**”.



4) Password changed successfully.