

# Platform quick guide

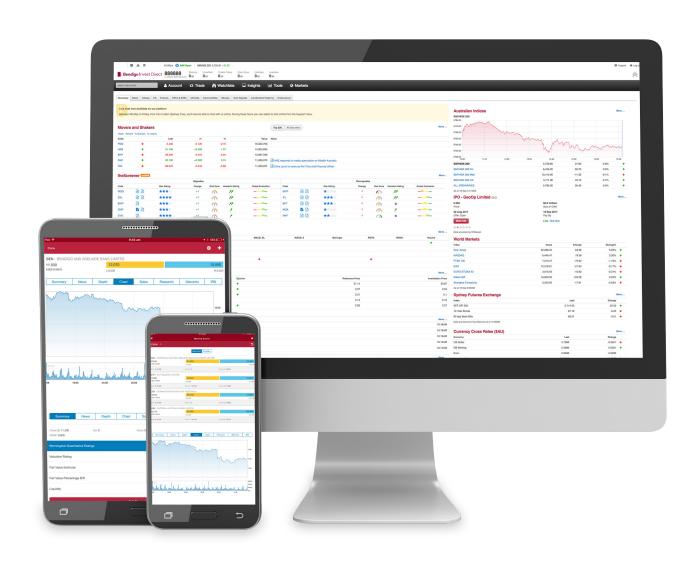
This handy guide provides an overview of the many tools and features available on the platform.

Learn how to set watchlists and alerts, place and manage orders, monitor positions, access market news, charts, statements and much much more.

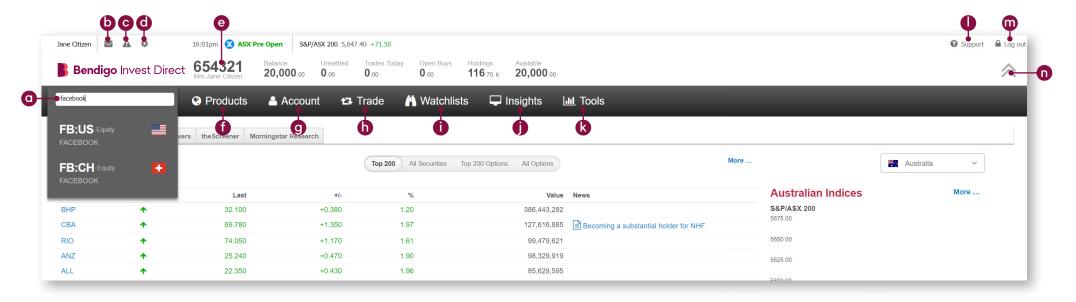


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# 1. Navigation Overview



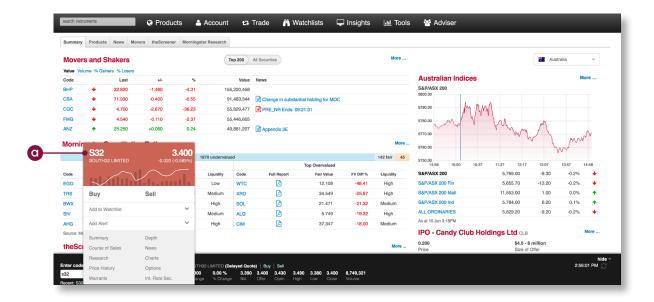
- a. Enter a stock code or name in the 'search instruments' field.
- View messages on trade events, stock alerts and invoices.
- c. Create and manage alerts.
- d. Manage personal details, market data and trading preferences.
- e. View your account number, holdings and available balance.
- f. Select, search or filter for available products.
- g. Manage your existing positions and orders, view your order history, confirmations, statements and run tax and portfolio reports.
- h. Place a trade.

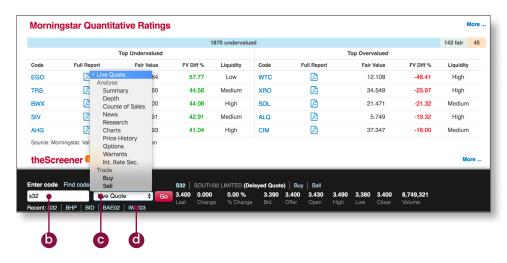
- i. Open an existing watchlist or create a new one.
- Access the latest market news and analysis, economic calendar and dividends calendar.
- k. Access our sector analysis, technical and fundamental market analysis, research, alerts and IPO centre.
- I. Access education materials, additional account forms and client support information including live chat.
- m. Securely log out of the platform.
- n. Hide the account details bar.

# 2. Finding a stock

Access market information and place a trade quickly by hovering over the stock from the summary page.

- **a.** Hover over any stock to bring up the stock menu to access course of sales, research, charts and more.
- b. Enter the company name or stock code.
- Select from either live quote, analysis or trade options.
- d. Quickly access up to five recently viewed stocks.

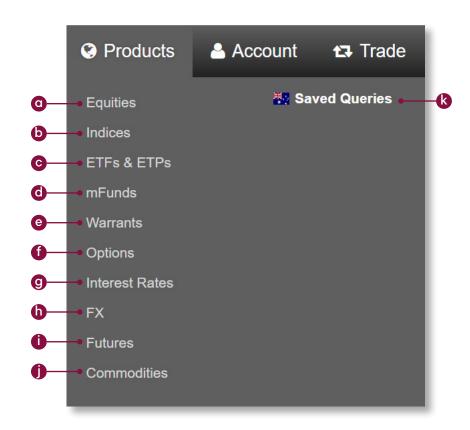




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#### 3. Products

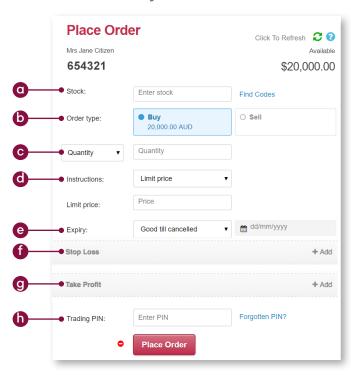
- a. Search and filter for all equities available to trade in your selection.
- b. View the current prices and constituents of Indices.
- c. Search and filter for ETFs & ETPs available to trade. ETFs & ETPs are a range of investment funds that hold a collection of assets like shares, commodities and bonds.
- **d.** Search and filter for unlisted managed funds that can be bought and sold through the mFund Settlement Service.
- e. Filter to see all available Warrants to trade\*.
- f. Search and filter for available Exchange Traded Options\*.
- g. Search and filter for available Interest Rates Securities to trade\*.
- Find the latest spot rates and cross rates.
- i. View the prices of Futures.
- j. See the latest price movements for popular commodities.
- k. View saved queries for the selected region.



<sup>\*</sup>Only available when Australia is selected as the region.

# 4. Placing a domestic trade

Hover over any stock code on the platform to launch the order ticket or select your order ticket from 'Trade' drop down menu.



- Enter the stock you want to trade.
- b. Click the buy or sell button to change the order type.
- c. Enter the quantity you wish to buy or sell.
- Select the order instructions choose between 'Limit', 'At Market', or 'Conditional Order'.
- e. Select an expiry for your order 'Good Till Cancelled', 'Day Only', or a specific date.
- f. Add an optional stop loss order to this position to protect against adverse price movements.
- g. Add an optional take profit order to this position so that you can exit your trade when an advantageous price is reached.
- h. Enter trading PIN to place your order.

#### **Order instructions:**

**Limit price** – A maximum price on a buy order or a minimum price on a sell order. If the market doesn't reach the set price, the order won't be executed.

**At market -** An order that you use to specify the direction and size of a trade, but not the price, which will generally be placed 3 price steps above or below the last sale.

**Conditional order –** An order that sets a 'trigger' to execute based on a set of criteria or market conditions.

**Stop loss –** An option to submit an order to the market to close your position when the price reaches your specified stop-loss price.

**Take profit -** An option to submit an order to the market to close an open position at a more profitable price compared to the price when placing the order.

#### **Expiry definitions:**

**Good till cancelled –** The order will not expire until it is filled or the stock is purged by the ASX.

Day Only - This type of order will expire at the end of the day if it has not filled.

# 5. Placing an international trade

Hover over any stock code on the platform to launch the order ticket or select your order ticket from 'Trade' drop down menu.

- **a.** Enter the international stock you want to trade check you have selected the correct market. You can see this next to the stock code.
- b. Click the buy or sell button to change the order type.
- c. Enter the quantity you wish to buy or sell.
- d. Select the order instructions 'Limit price'.
- e. Select an expiry for your order 'Day Only'.
- f. Estimated Brokerage and fees.
- g. FX buffer rate this is applied to buy orders only at the time of placement to protect against currency movements. Any excess buffer will be unlocked on order execution.
- h. Enter trading PIN to place your order.

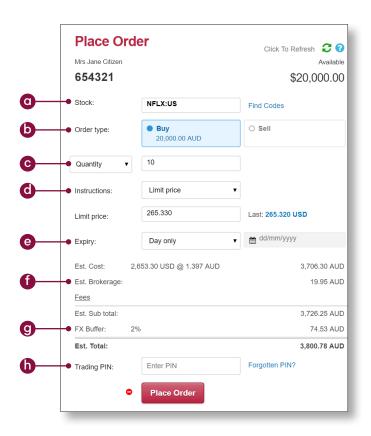
#### **Order instructions:**

**Limit price** – A maximum price on a buy order or a minimum price on a sell order. If the market doesn't reach the set price, the order won't be executed.

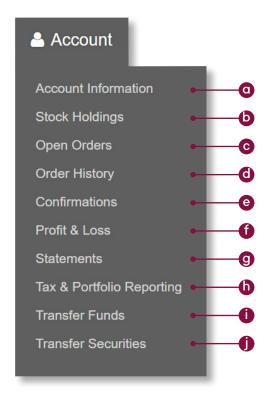
**At market –** An order that you use to specify the direction and size of a trade, but not the price which could be placed 3 price steps above or below the last sale.

#### **Expiry definitions:**

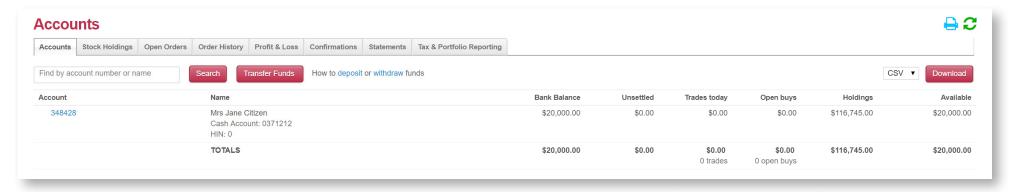
Day Only - This type of order will expire at the end of the day if it has not filled.



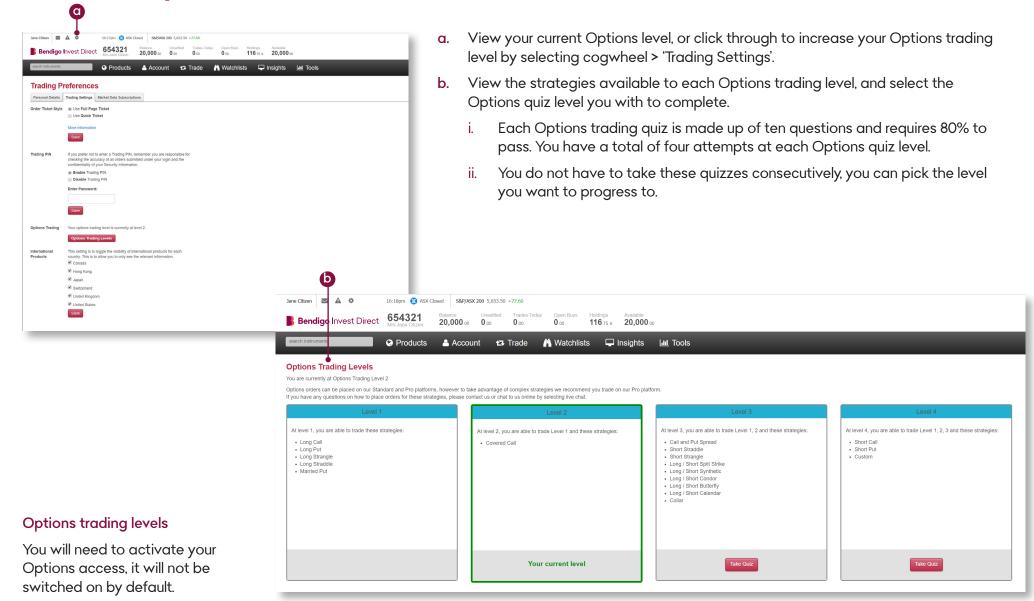
#### 6. Your account



- Check your account information.
- b. View your current holdings.
- c. View all open orders and download a summary of these trades.
- d. View and download past orders.
- e. View and download all your order confirmations.
- f. Check the performance of your holdings.
- g. View and download all account and cash statements within a specified time period.
- h. Access free tax & portfolio reporting from Sharesight.
- i. Withdraw funds to a linked bank account.
- j. Request a transfer of issure sponsored securities to a nominated account.

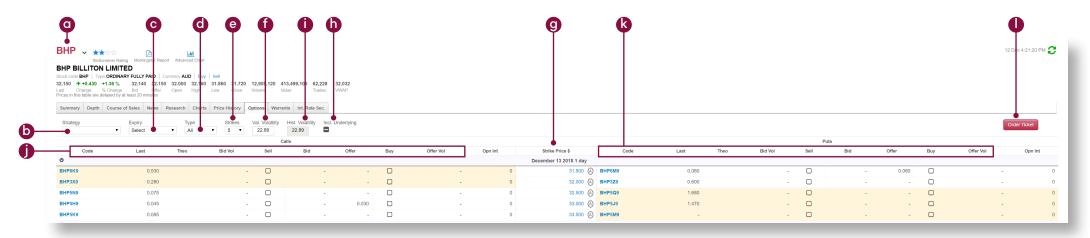


# 7. Your Options account



#### 8. Options tab

Hover over any stock code and click on the Options tab in the order ticket, or select Options from 'Products' drop down menu.

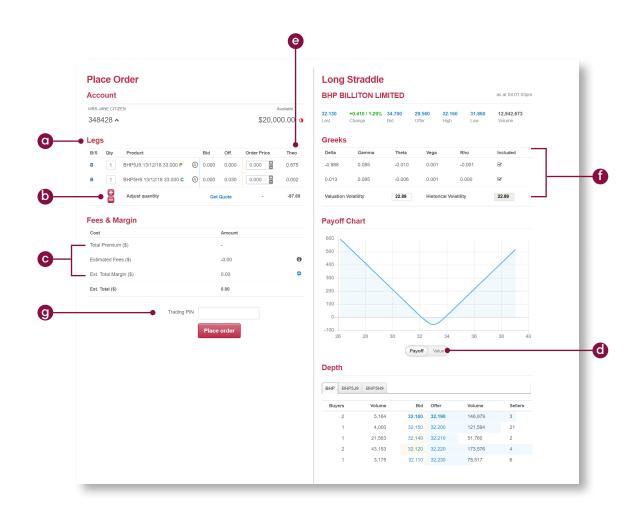


- a. Enter the stock code of the underlying Options security.
- b. Select from the list of available strategies.
- c. Select the expiry date depending on your Options.
- d. Filter by American or European Options.
- e. Select the number of strikes to display.
- **f.** Valuation Volatility Set the volatility used for theoretical Options price valuation.
- g. Strike price is displayed.

- **h.** If trading a Buy Write, Collar or Married Put, the underlying stock will be included in the order.
- i. Historical Volatility.
- i. View 'Calls'.
- k. View 'Puts'.
- Select the relevant strategy by choosing 'Calls' or 'Puts' and click order ticket to confirm your order. Your strategy will display on the order ticket.

# 9. Options order ticket

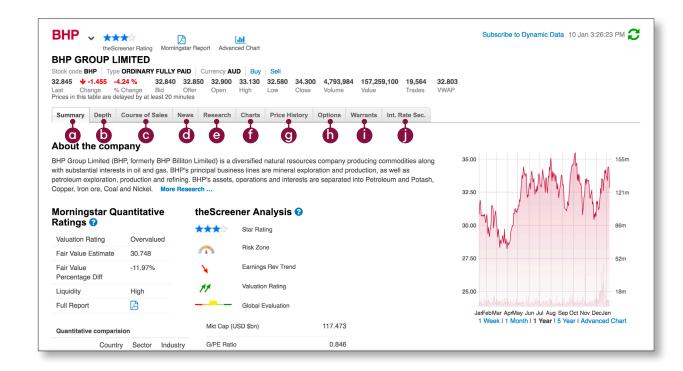
- a. Legs of strategy.
- b. Click to adjust order quantity.
- View the estimated brokerage, fees and total cost of the order.
- Select between 'Payoff' or 'Value' when viewing the payoff chart.
- e. View Theoretical price estimate.
- f. You can view Option Greeks and adjust the volatility values to see their impact in the Greeks.
- g. Enter trading PIN to place your order.



#### 10. Stock specific market information

Review a stock's performance with access to depth, course of sales, charts, news and research plus much more. You can access all of this information on any stock's profile page.

- Get a quick snapshot of the stock's company overview.
- **b.** See the number of buyers and sellers, volume and prices of the stock.
- c. View a summary of all trades that have taken place throughout the trading day.
- Read the latest stock related news from Dow Jones and ASX.
- e. Access comprehensive fundamental research on value, income, risk profiles and growth rates.
- Access both basic and advanced charts for the stock.
- g. View/download historical prices of the stock.
- See available Options for the stock with the ability to filter by expiration date and range.
- i. View available Warrants for the stock.
- j. View the Interest Rate Securities available for the stock.



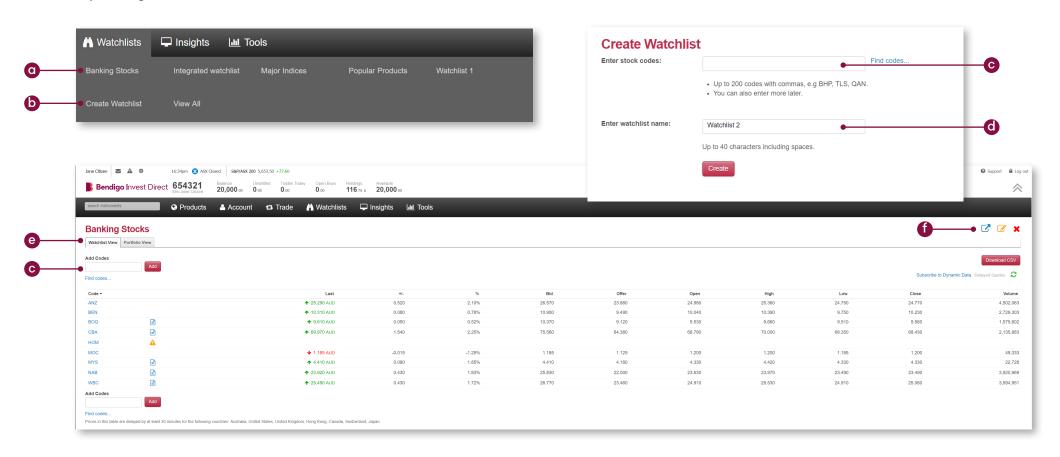
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#### 11. Watchlists

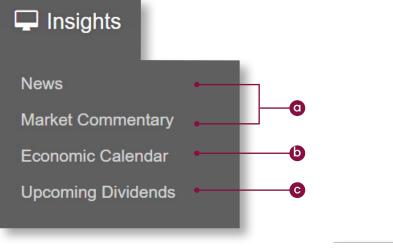
Create watchlists containing your favourite domestic and international products for easy access.

- view default watchlists.
- b. Click on 'Create Watchlist' to create a new list.
- Add stocks to your new list by entering the stock code and separating them with commas.

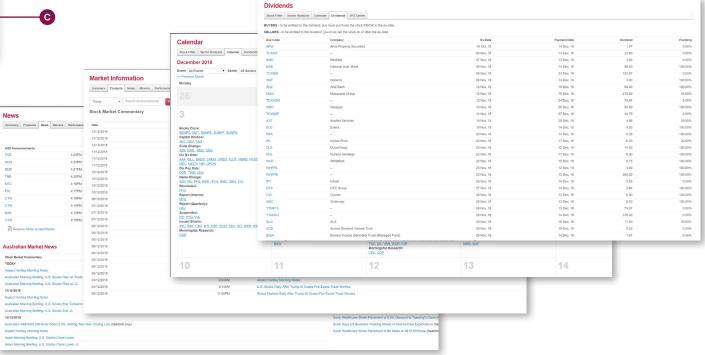
- d. Enter a name for the watchlist and click 'create'.
- e. View your list in either Watchlist view or Portfolio view.
- f. View watchlist in a pop out window, edit or delete the watchlist.



#### 12. News and research



- **a.** Live news and analysis to keep you up to date with the latest market information.
- **b.** Get a snapshot of corporate action dates, easily filtered by events and sectors.
- c. View upcoming dividends for all ASX-listed companies, including ex-dividend and pay dates, cents per share and franking percentage.



# 13. Trading tools

- a. Compare key metrics like earnings per share, dividends per share and dividend yield, across sectors and sub-sectors to view the top 300 ASX stocks.
- b. View star-rated reports from the Screener.
- c. View under/over valued stocks including fair value and liquidity ratings.
- d. View/edit your alerts.
- View and bid on current Australian IPOs with OnMarket Bookbuild.



#### 14. Advanced charting

Launch our advanced charts from the Advanced Chart icon at the top of any stock profile page or by clicking the link below the chart displayed on the stock summary page.



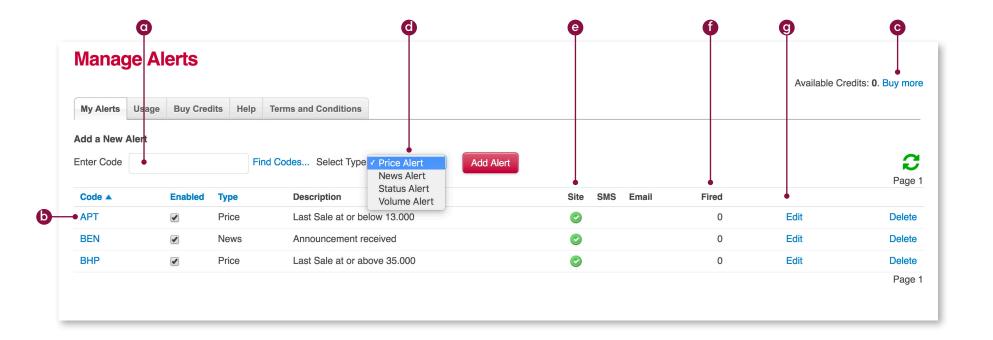
- Access a large suite of drawing tools trend lines, Fibonacci, Gann and many more.
- **b.** Change the time frame covered by each candlestick/bar or the amount of history shown on the chart.
- c. Select your preferred chart type candlesticks, bar charts and more.
- d. Compare the performance of different stocks on a single chart.
- e. Search for chart patterns.

- f. Add studies like moving averages, RSI and many more.
- g. Change the look of your chart via multiple settings.
- h. Save your drawings and studies then scroll through different scenarios using presets.
- Click through stocks of interest by setting up watchlists then clicking to bring up charts with saved drawings and pre-set studies.

#### 15. Alerts

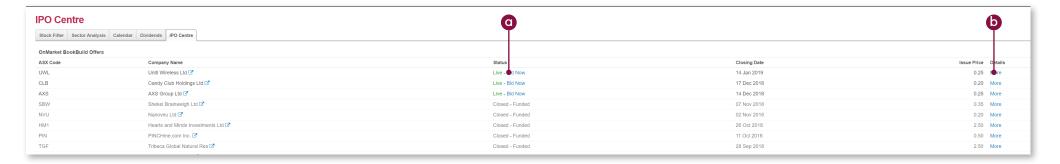
Manage your alerts by simply hovering over the tools menu and selecting 'Alerts'.

- a. Enter the stock code.
- b. View your history of alerts.
- c. Top up your credits to add more alerts.
- d. Select from price, news, status or volume alert and click 'Add Alert'.
- e. Shows the delivery mode selected for a particular alert.
- View how many times this alert has been triggered.
- g. Edit the alert settings.

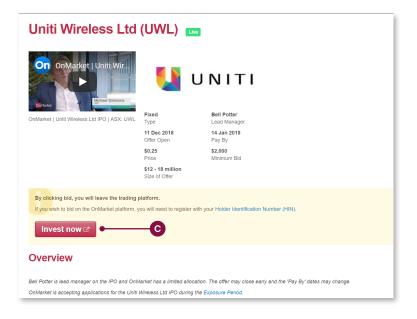


#### 16. IPO centre

Browse the range of OnMarket offers available on our IPO Centre. Simply register with the OnMarket platform and provide your HIN to place your bid. Your holdings will seamlessly be added to your designated portfolio once the offer is successfully closed.



- **a.** You can access our IPO centre by hovering over the 'Tools' menu and selecting 'IPO Centre'. Click 'Bid now' to learn more about an available IPO.
- b. Get an overview of the selected IPO including important dates, share price, minimum bid and the size of the offer by clicking in the Details column.
- c. If you wish to bid on the OnMarket platform, you will need to click on the Invest now button to access the Bendigo Invest Direct OnMarket portal and register with your Holder Identification Number (HIN).

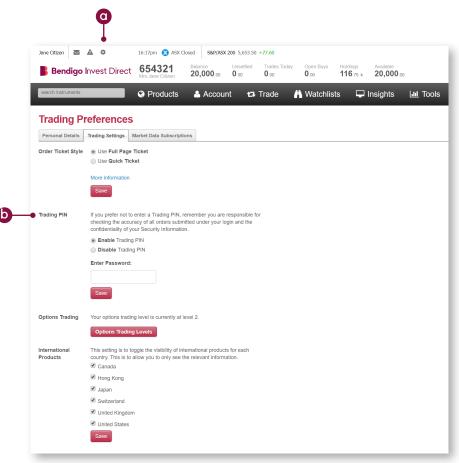


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# 17. Settings

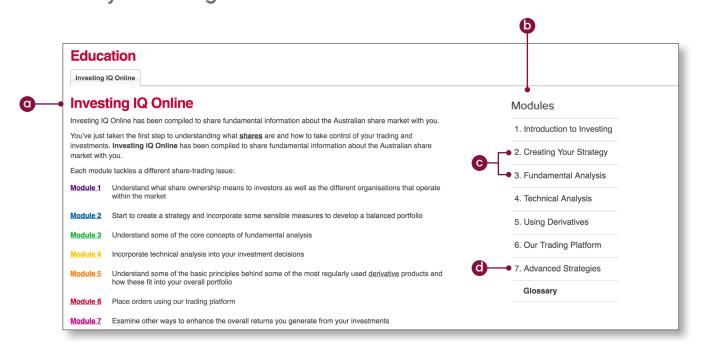
Configure your account and platform to suit your individual needs by using the inbuilt preferences and settings.

- Access your platform preferences by hovering over the cogwheel in the top left hand corner of your screen. Select from:
  - i Personal Details change your username, password, trading PIN or other personal details. You can also manage your email communications and site preferences here.
  - ii Market Data Subscriptions.
  - iii Trading Settings update your order ticket style, enable or disable your trading PIN and manage your Options trading levels and international market access.
- b. We recommend the use of a trading PIN for additional security.



#### 18. Education

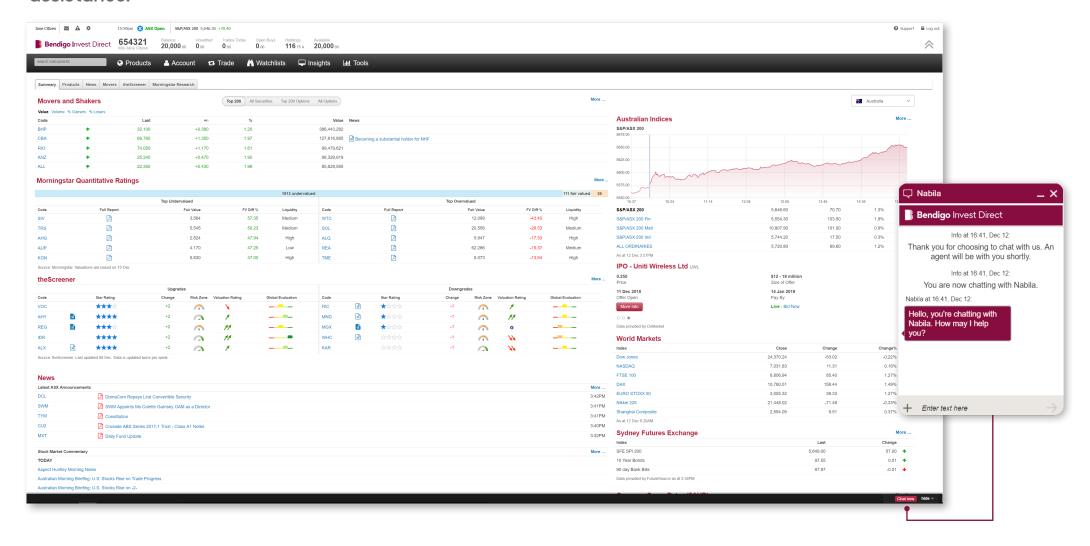
Expand and test your knowledge of the Australian share market with the investing IQ modules available directly on the platform. This free program is designed to provide you with the fundamentals to help you take control of your trading and investment decisions.



- Access Investing IQ from the support menu in the top right hand corner of your screen.
- Choose from a range of topics to complete from the modules menu.
- Master the fundamentals and build your market knowledge.
- Learn important strategies to help build your trading capability.

# 19. Live chat support

Available from 8am – 5.30pm Monday to Friday and easily accessible by clicking on the 'chat now' button found in the bottom right hand corner of the platform. Clients can call outside of these times for international assistance.





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The information in this Platform Quick Guide is general advice only and does not take into account your personal objectives, financial situation, or needs. You should consider its appropriateness to your circumstances before acting on this information.

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