

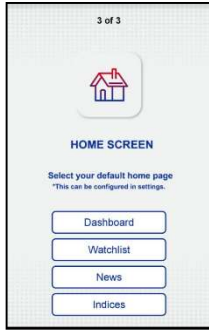

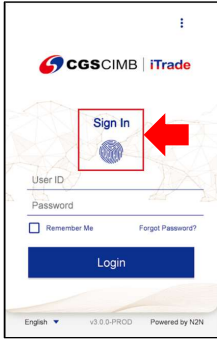

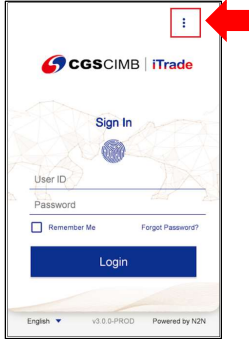



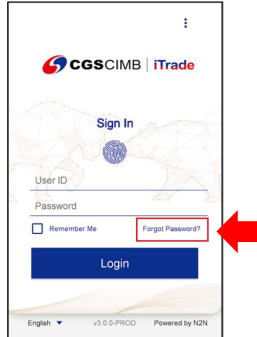
**NOTE:** The new app only compatible to work with the Android device (7.0 or later) or iPhone (iOS 10.0 or later).

Feature	Information & Guide
First time login to the iTrade mobile app	<p>3 simple steps to setup your iTrade mobile app:</p> <div data-bbox="321 378 584 441"> <b>Step 1:</b> Activate biometric login </div> <div data-bbox="321 508 529 835">  </div> <div data-bbox="691 378 958 441"> <b>Step 2:</b> Enable push notification </div> <div data-bbox="691 508 899 835">  </div> <div data-bbox="1062 378 1422 472"> <b>Step 3:</b> Choose your default homepage from the list </div> <div data-bbox="1062 508 1269 835">  </div>
Login Page	<p>1) You can login with password or use the biometric login:</p> <div data-bbox="321 966 708 997"> Touch here to login with “Face ID” </div> <div data-bbox="847 966 1266 997"> Touch here to login with “Fingerprint” </div> <div data-bbox="321 1033 535 1369">  </div> <div data-bbox="847 1033 1062 1369">  </div> <div data-bbox="1110 1033 1325 1369">  </div> <p>2) Click the 3 small dots at the upper right corner to access the information from our website</p> <div data-bbox="321 1512 568 1848">  </div> <div data-bbox="626 1512 841 1848">  </div>

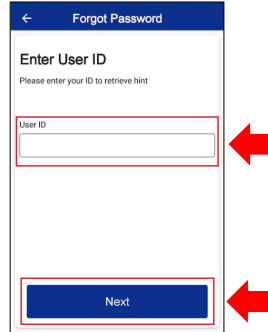
## Forgot & Reset Password

### How to reset password in iTrade mobile app?

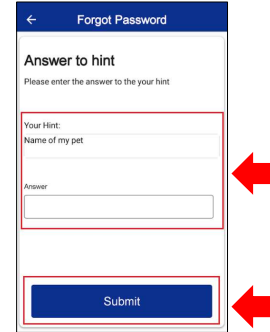
**Step 1:**  
Click “Forgot Password” in the login screen.



**Step 2:**  
Enter your “User ID” here and click “Next”

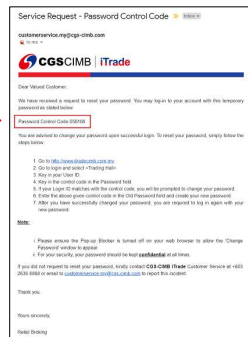


**Step 3:**  
Enter the answer of the hint and click “Submit”



#### Step 4:

You will receive an email containing a 6-digit temporary password from “CGS-CIMB iTrade”. Please follow the instructions in the email to reset your password.



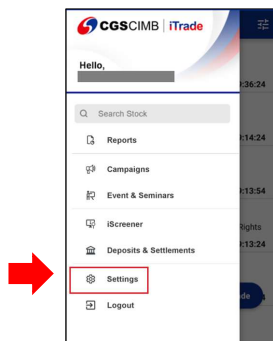
#### Tips:

*The temporary password will be sent to your CGS-CIMB iTrade registered email address.*

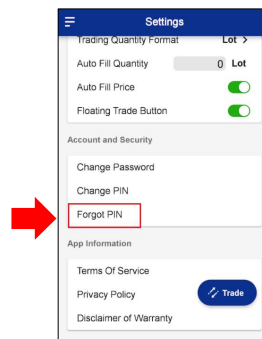
## Forgot & Reset PIN

### How to reset PIN in iTrade mobile app?

**Step 1:**  
Go to “Settings” screen from “Menu”



**Step 2:**  
Click “Forgot PIN” in the “Settings” screen.

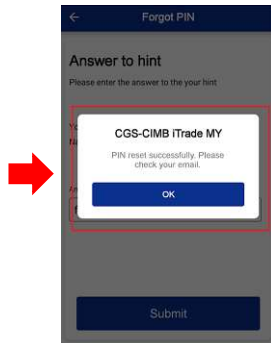


**Step 3:**  
Enter the answer of the hint and click “Submit”



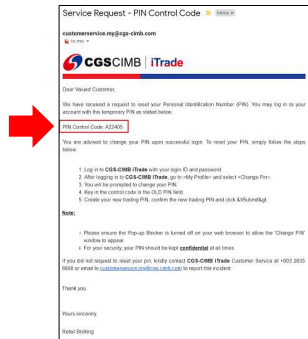
#### Step 4:

A message will pop up and ask you to check your email. Click "OK"



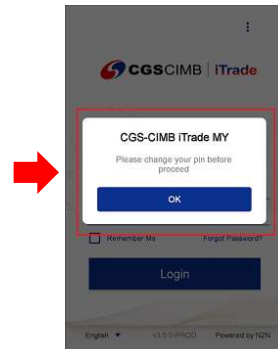
#### Step 5:

You will receive an email containing temporary PIN code from "CGS-CIMB iTrade". Please follow the instructions in the email to reset your PIN.



#### Step 6:

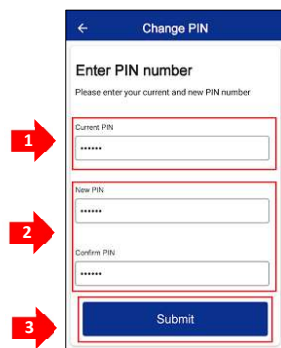
Go to iTrade mobile app "Login" screen. You will be prompted with a message to request you change the PIN. Click "OK"



#### Step 7:

When you log in to the iTrade mobile app, you will be routed to the "Change PIN" screen.

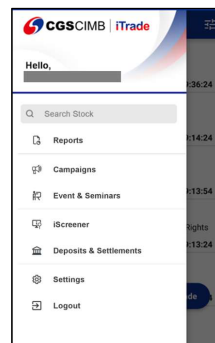
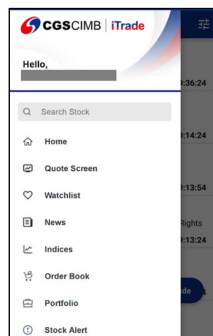
- 1) Key in the temporary PIN in the email
- 2) Enter the new 6-digit PIN
- 3) Click "Submit"



#### Tips:

The temporary PIN will be sent to your CGS-CIMB iTrade registered email address.

#### Menu



#### Tips:

You also can enter to the following screens from the shortcut menu at the bottom:

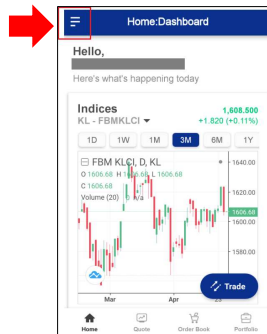
- Home
- Quote
- Order Book
- Portfolio

# Place Order

## How to buy/sell shares?

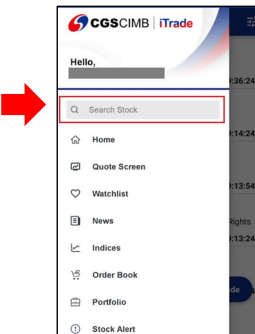
### Step 1:

At "Home" screen, click the icon at the upper left corner to see the "Menu"



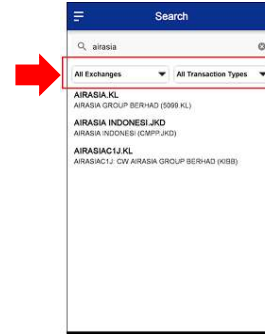
### Step 2:

Search the stock from the "Menu"



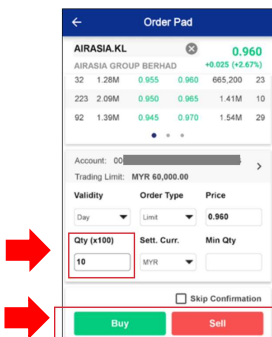
### Step 3:

Filter by exchange and transaction type (e.g. "Normal Board Lot", "Normal Odd Lot"... etc)



### Step 4:

Insert buy/sell quantity then click the "Buy/Sell" button below



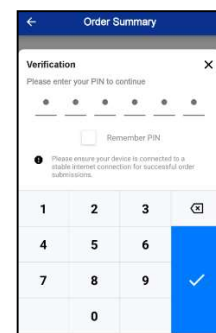
### Step 5:

Confirm your order at the "Order Summary"



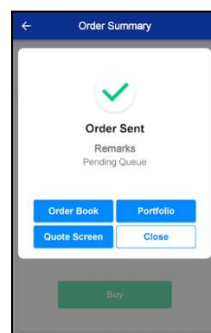
### Step 6:

Insert your 6 digits PIN number



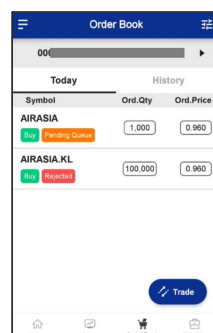
### Step 7:

From the "Order Sent" screen, click the "Order Book" to view the order status.



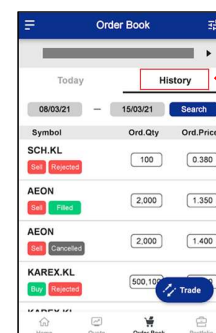
### Step 8:

Check and verify your order status in "Order Book"



### Tips:

To view the order history, click the "History".

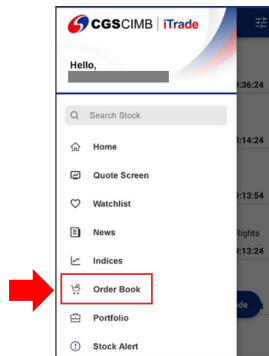


# Check / Revise / Cancel Order

## How to check / revise / cancel and revise order?

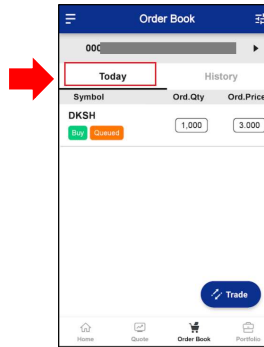
### Step 1:

Click here to access “Order Book” screen from “Menu”



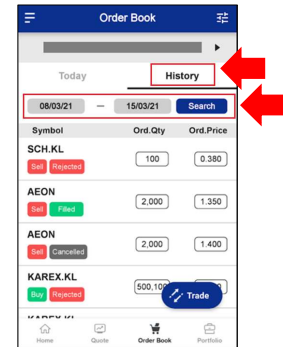
### Step 2:

You will see “Today” orders by default in the “Order Book” screen



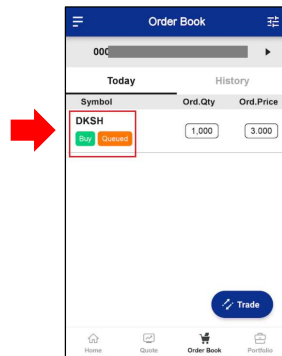
### Step 3:

For “History” orders, click here and search by date range



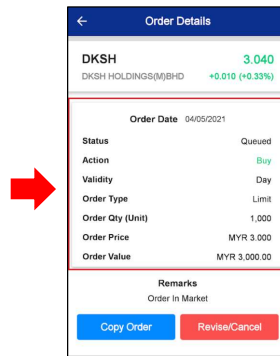
### Step 4:

To check the order details, click on the stock name



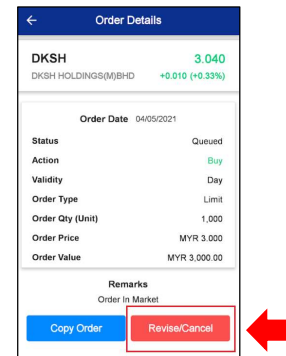
### Step 5:

In the “Order Details” page, check your order details here



### Step 6:

To revise / cancel your order, click here

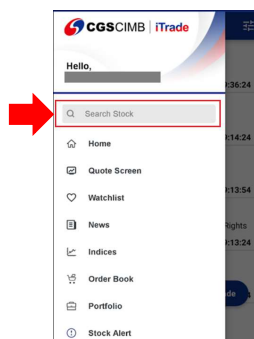


# Normal Odd Lot

## How to search normal odd lot counter?

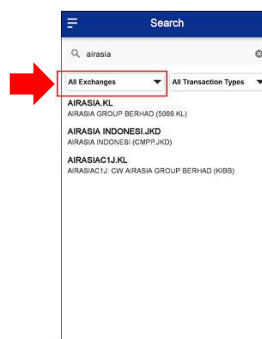
### Step 1:

Search the stock from “Menu”



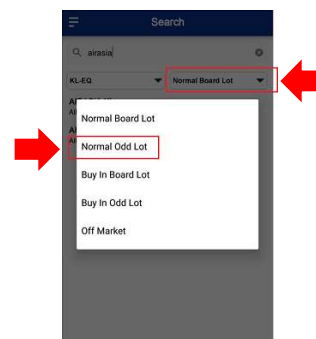
### Step 2:

Select the stock exchange from the “All Exchanges” list (e.g. KL-EQ)

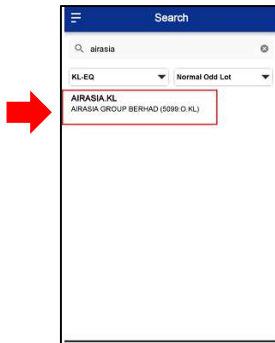


### Step 3:

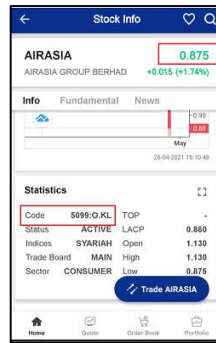
Select “Normal Odd Lot” form the “All Transaction Types” list



**Step 4:**  
Click the normal odd lot



**Step 5:**  
Check the stock code and stock price again in "Stock Info" screen before place order



## Cash Deposit

How to perform cash deposit in iTrade mobile app?

**Step 1:**  
Go to "Deposits & Settlements" screen from "Menu", select "Deposit"



**Step 2:**  
Click the "Online Cash Deposit"



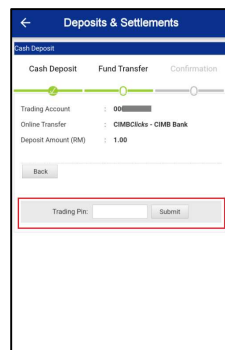
**Step 3:**  
Select the cash deposit method (Direct deposit with CIMBClicks or PFX)



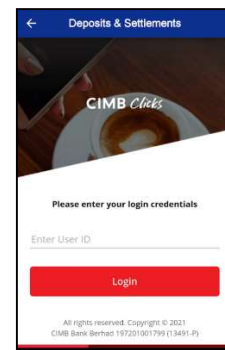
**Step 4:**  
Key in your amount and click "Confirm"



**Step 5:**  
Key in your 6 digits PIN

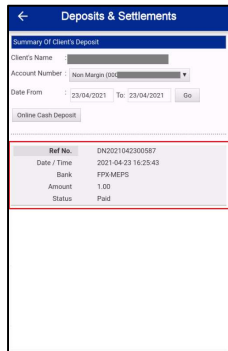


**Step 6:**  
You will be redirected to the online banking page. Login and complete the cash deposit process.



### Step 7:

You will receive a notification of the cash deposit status.  
Or you can check the status in the “Deposits & Settlements” home screen



Ref No.	Date / Time	Bank	Amount	Status
DN2021042300587	2021/04/23 16:25:43	179146PIS	1.00	Paid

## Settlement

### How to do settlement in iTrade mobile app?

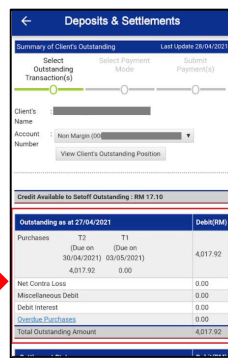
#### Step 1:

Go to “Deposits & Settlements” screen from “Menu”, select “Settlement”



#### Step 2:

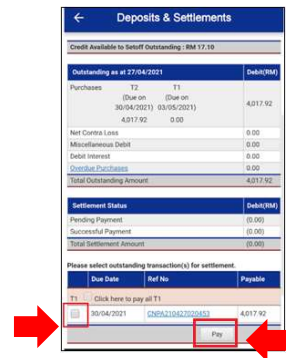
View your outstanding summary here



Outstanding as at 27/04/2021	Debit(RM)
Purchases T2 (Due on 30/04/2021) 03/05/2021	4,017.92
Net Contra Loss	0.00
Miscellaneous Debt	0.00
Debit Interest	0.00
Overdue Purchases	0.00
<b>Total Outstanding Amount</b>	<b>4,017.92</b>

#### Step 3:

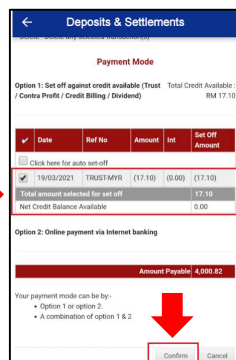
Check the box for outstanding settlement, and click “Pay”



Settlement Status	Debit(RM)
Pending Payment	(0.00)
Successful Payment	(0.00)
<b>Total Settlement Amount</b>	<b>(0.00)</b>

#### Step 4:

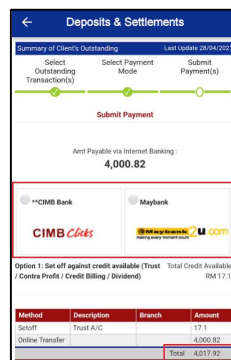
Check the box if you wish to offset the outstanding with the Trust amount, and click “Submit”



Date	Ref No.	Amount	Set Off Amount
19/03/2021	TRUSTMYR	(17.10)	(17.10)
<b>Total amount selected for set off</b>		<b>(17.10)</b>	
<b>Net Credit Balance Available</b>		<b>(0.00)</b>	

#### Step 5:

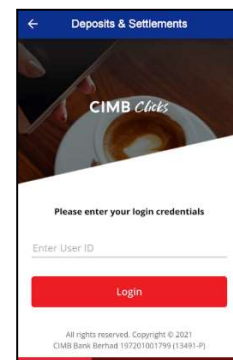
Select to settle the outstanding with which bank and double check your final outstanding amount



Method	Description	Branch	Amount
Setoff	Trust A/C		17.1
Online Transfer			4,000.82
<b>Total</b>			<b>4,017.92</b>

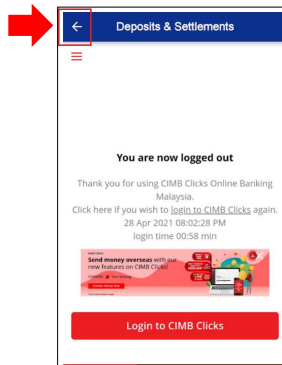
#### Step 6:

You will be redirected to the online banking page. Login and complete the settlement process.





**Step 7:**  
Click here to back to the “Deposits & Settlements” home screen



**Step 8:**  
You can view your settlement status here



**Tips:**  
You also can click the “Settlement Status” from the “Deposits & Settlements” to view the settlement status



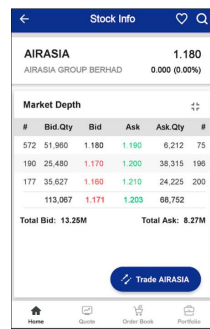
**Stock Info (1)**

**Step 1: Search a stock in the “Menu”**  
**Step 2: You will see the following information in the “Stock Info” screen**

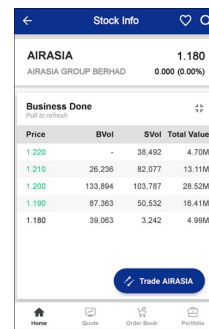
Statistics



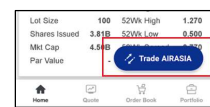
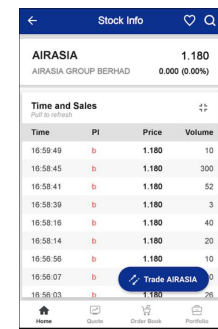
Market Depth



Business Done



Time & Sales



**Tips:**  
Click the “Trade” button to place order.

**Stock Info (2)**

To view the “Analytic Chart” in full details, click here and rotate your phone to view in landscape view.



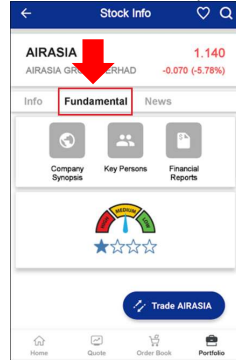
Landscape view



### Stock Info (3)

To view the stock fundamental reports and news, click here:

#### Fundamental Reports

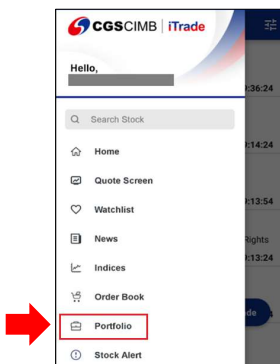


#### Stock News



### View Portfolio

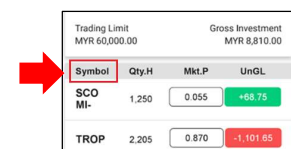
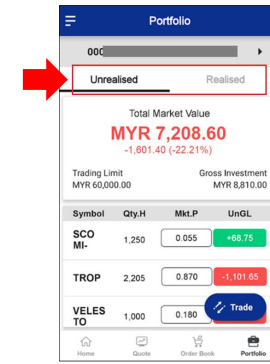
**Step 1:**  
Click here to access “Portfolio” screen from “Menu”



**Step 2:**  
Read and accept the disclaimer



**Step 3:**  
View your “Unrealized” and “Realized” portfolio here



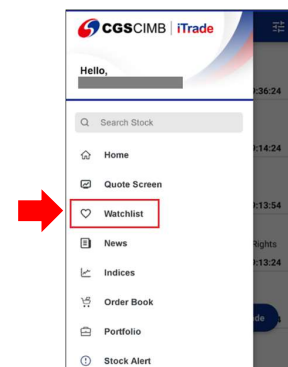
**Tips:**

Click here to sort the portfolio alphabetically.

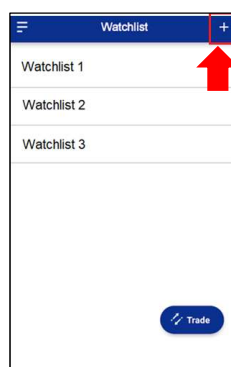
### Watchlist

How to create new watchlist in iTrade mobile app?

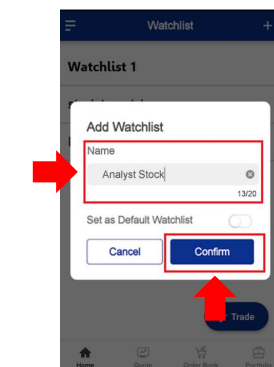
**Step 1:**  
Click here to access “Watchlist” screen from “Menu”



**Step 2:**  
Click the “+” icon at the upper right corner

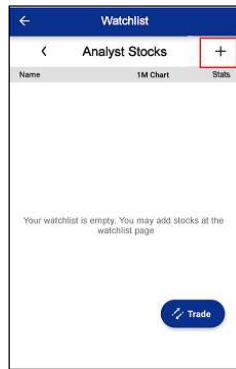


**Step 3:**  
Enter the new watchlist name and click “Confirm”



**Step 4:**

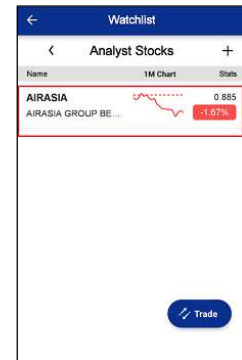
Click here to add stocks for the new "Watchlist"


**Step 5:**

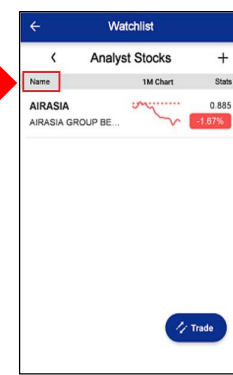
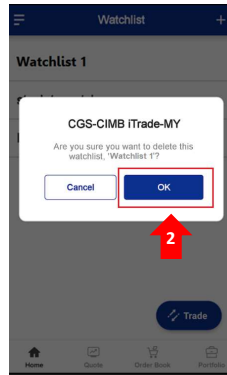
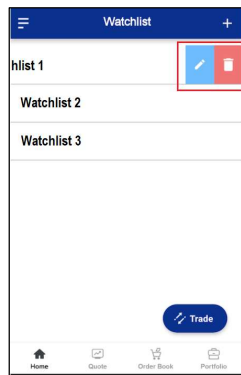
Search for stock name and click "Add"


**Step 6:**

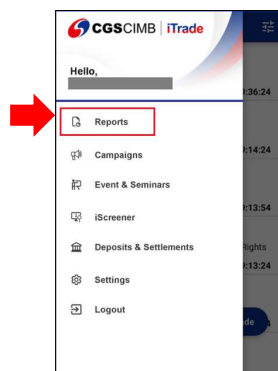
The stock has been added to the "Watchlist"


**Tips:**

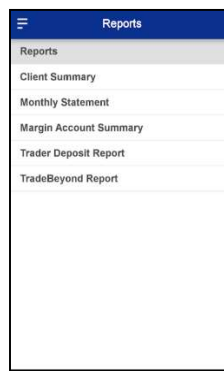
1. You can edit or delete an existing watchlist by swiping the watchlist to the left.
2. The same method is also applicable to delete existing stocks from the watchlist.
3. By clicking on <Name>, you can sort the stocks in watchlist by alphabetical.


**Reports**
**How to view summary reports from iTrade mobile app?**
**Step 1:**

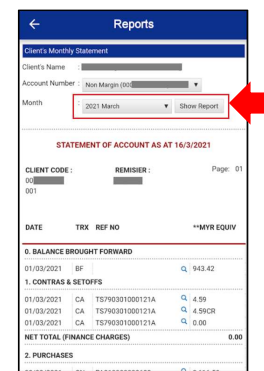
Click here to access "Reports" screen from "Menu"


**Step 2:**

Select the report you want to view

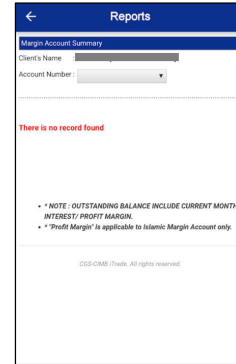

**Step 3:**

Click here to select the month and click "Show Report"

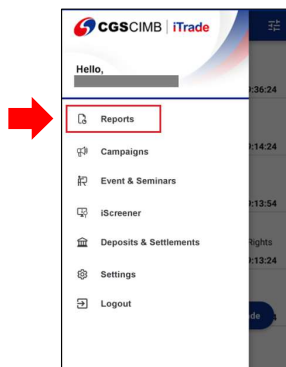


**Tips:**

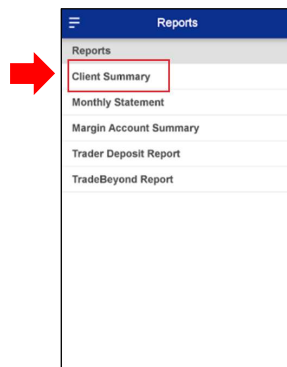
Please note that if the report category you selected in step 2 does not apply to your account, you will not see any reports on the said report screen. For example, if you do not have a margin account, you will not see any reports on the "Margin Account Summary" report screen.


**Trust Account**
**How to view my Trust account balance in iTrade mobile app?**
**Step 1:**

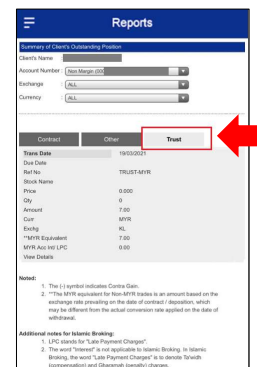
Go to "Reports" screen from "Menu"


**Step 2:**

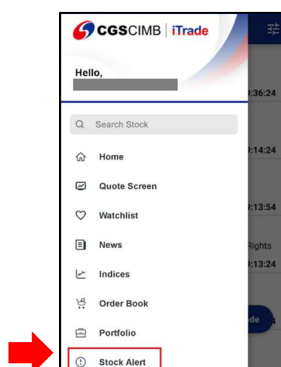
In the "Reports" home screen, click "Client Summary"


**Step 3:**

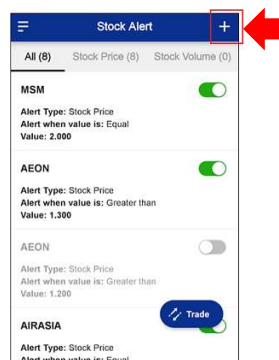
In the "Client Summary" screen, click here to view your Trust account balance


**Stock Alert**
**How to add new stock alert in iTrade mobile app?**
**Step 1:**

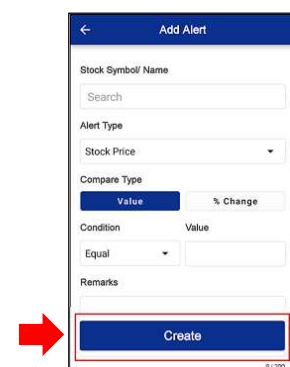
Click here to access "Stock Alert" screen from "Menu"


**Step 2:**

Click the "+" icon to add new stock alert

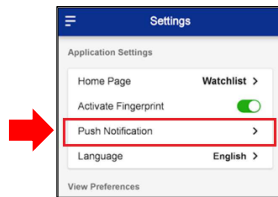

**Step 3:**

Insert the new stock alert details and requirements, and click "Create"



### Tips:

- In order to receive stock alerts, you must enable the "Push Notification" feature in "Setting" screen.

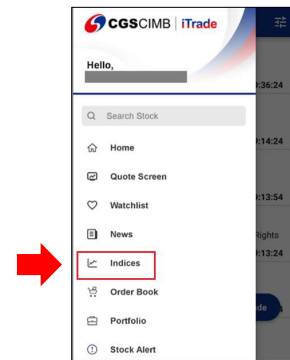


- Once a stock alert is sent to you, the alert will be automatically disabled in the "Stock Alert" screen. If you still want to receive the same alert in the future, you must enable it again.

## Indices Screen

### Step 1:

Click here to access "Indices" screen from "Menu"



### Step 2:

Click here to view the indices in different exchange

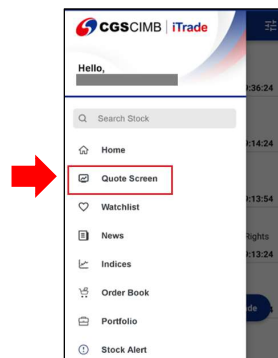


## Quote Screen

You can view all exchanges in one screen in iTrade mobile app.

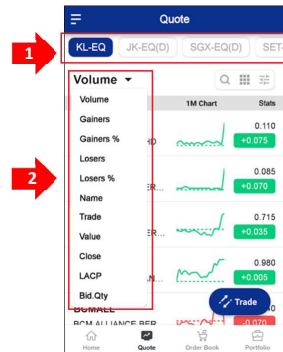
### Step 1:

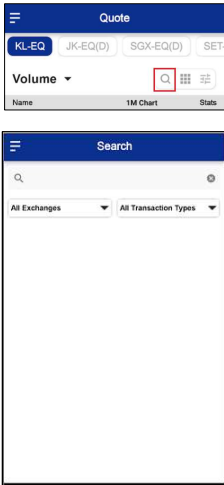
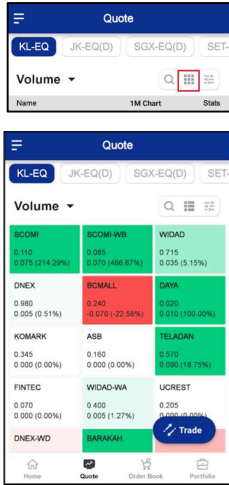
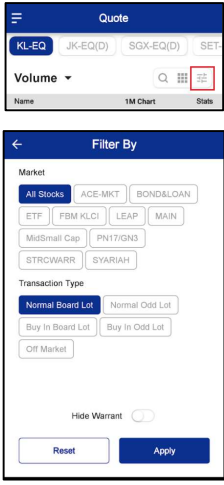
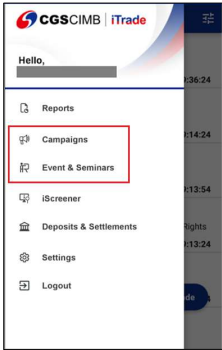
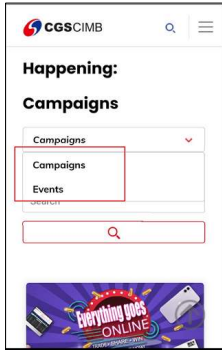
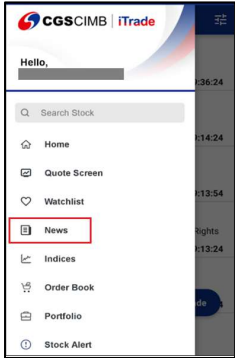

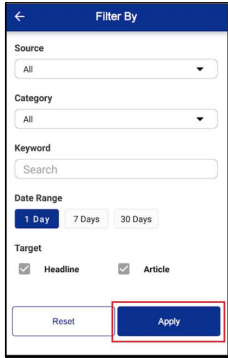
Click here to access "Quote Screen" from "Menu"

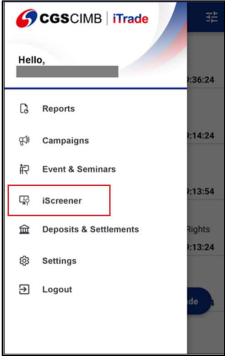
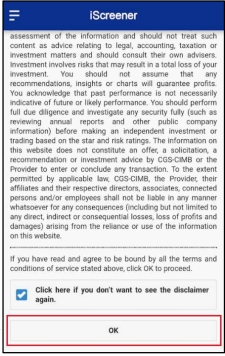
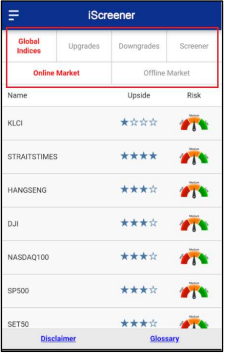
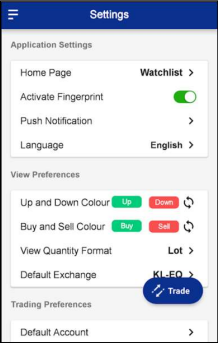
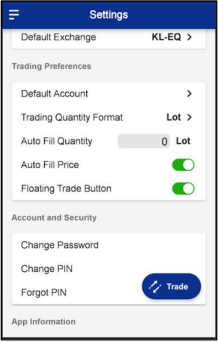
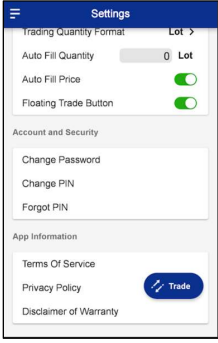


### Step 2:

- View the quote screen in different exchange
- Click here to view the quote from different aspect



	<p><b>Tips:</b> Switch between the icons for more view options</p> <div> <div> <h3>Search stock</h3>  </div> <div> <h3>Heatmap View</h3>  </div> <div> <h3>Filter by</h3>  </div> </div>
<b>Campaigns, Event &amp; Seminars</b>	<div> <div> <p><b>Step 1:</b> Click here to access “Campaigns, Event &amp; Seminars” screen from “Menu”</p>  </div> <div> <p><b>Step 2:</b> Click here to access “Campaigns, Event &amp; Seminars” screen from “Menu”</p>  </div> </div> <p><b>Tips:</b> This feature is a hyperlink to CGS-CIMB iTrade website.</p>
<b>Search News</b>	<p><b>How to search news in iTrade mobile app?</b></p> <div> <div> <p><b>Step 1:</b> Click here to access “News” screen from “Menu”</p>  </div> <div> <p><b>Step 2:</b> Click here to filter the news</p>  </div> <div> <p><b>Step 3:</b> Key in the details, and click “Apply” to search the related news</p>  </div> </div>

<b>iScreener</b>	<div data-bbox="321 180 688 275"> <p><b>Step 1:</b> Click here to access “iScreener” screen from “Menu”</p> </div> <div data-bbox="380 342 602 695">  </div> <div data-bbox="729 180 1062 275"> <p><b>Step 2:</b> Read the disclaimer and click “OK” to access</p> </div> <div data-bbox="808 342 1031 695">  </div> <div data-bbox="1117 180 1450 306"> <p><b>Step 3:</b> Switch between options here to get the information you want to know</p> </div> <div data-bbox="1206 342 1429 695">  </div>
<b>Settings</b>	<div data-bbox="321 726 753 758"> <p><b>What you can do in &lt;Settings&gt; screen?</b></p> </div> <div data-bbox="326 789 1255 1146"> <ul style="list-style-type: none"> <li>• Set the default home page (Pick from “Dashboard, Watchlist, News &amp; Indices”)</li> <li>• Active/Inactive Fingerprint</li> <li>• Enable/Disable Push Notification</li> <li>• Switch Language (<i>coming soon</i>)</li> <li>• Set “View Preferences”</li> <li>• Set “Trading Preferences”</li> <li>• Enable/Disable “Floating Trade Button”</li> <li>• Change Password</li> <li>• Change/Forgot PIN</li> <li>• View App Information (<i>Terms of Service, Privacy Policy &amp; Disclaimer of Warranty</i>)</li> </ul> </div> <div data-bbox="326 1178 542 1518">  </div> <div data-bbox="667 1178 883 1518">  </div> <div data-bbox="1008 1178 1224 1518">  </div>