NOTE: *The new app only compatible to work with the Android device 9.0 or later and iPhone iOS 13.0 or later.*

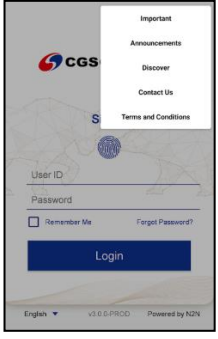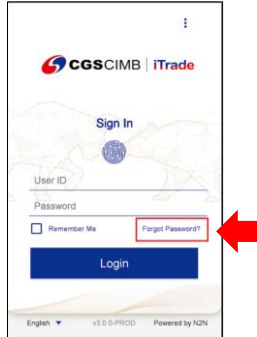| Feature	Information & Guide
First time login to the iTrade mobile app	**3 simple steps to setup your iTrade mobile app:** **Step 1:** Activate biometric login **Step 2:** Enable push notification **Step 3:** Choose your default homepage from the list
Login Page	**1) You can login with password or use the biometric login:** Touch here to login with "Face ID" Touch here to login with "Fingerprint" **2) Click the 3 small dots at the upper right corner to access the information from our website**

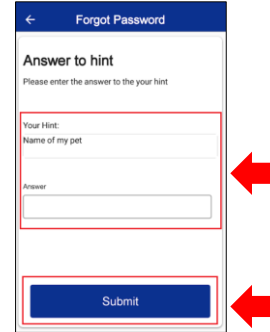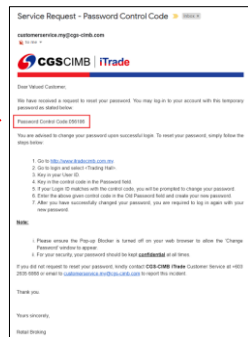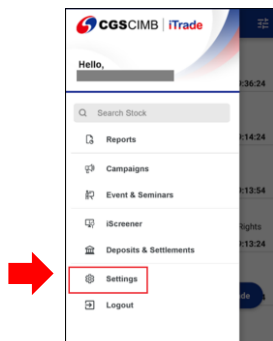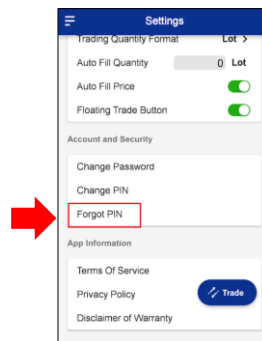|	
Forgot & Reset Password	**How to reset password in iTrade mobile app?** **Step 1:** Click "Forgot Password" in the login screen. **Step 2:** Enter your "User ID" here and click "Next" **Step 3:** Enter the answer of the hint and click "Submit" **Step 4:** You will receive an email containing a 6-digit 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"
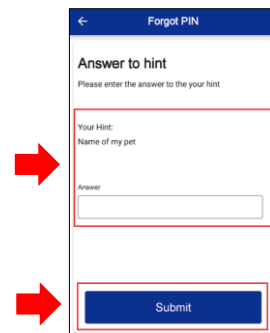
Step 4:
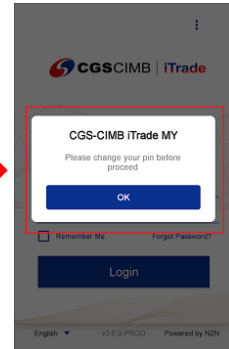A message will pop up and ask you to check your email. Click "OK"
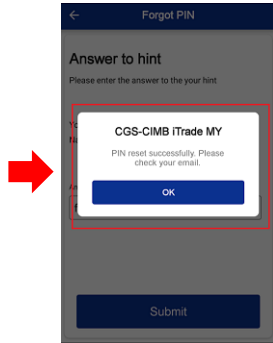
Step 5:
You will receive an email containing temporary PIN code from "CGS-CIMB iTrade. Please follow the instructions in the email to reset your PIN.

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:
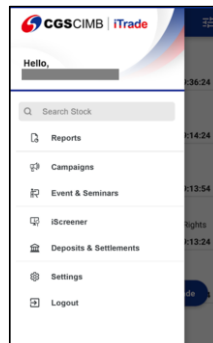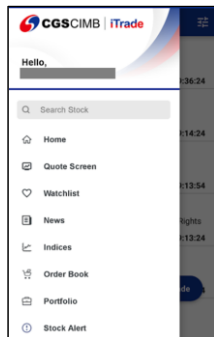When you log in to the iTrade mobile app, you will be routed to the "Change PIN" screen.
1) Key in the temporary PIN in the email
2) Enter the new 6-digit PIN
3) Click "Submit"

Tips:
The temporary PIN will be sent to your CGS-CIMB iTrade registered email address.
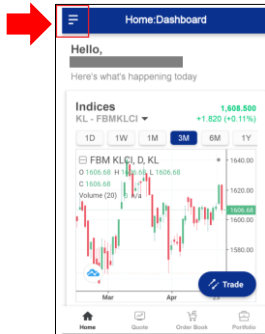
Menu		*Tips:*
		You also can enter to the following screens from the shortcut menu at the bottom:
		• *Home*
		• *Quote*
		• *Order Book*
		• *Portfolio*

| 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 1:
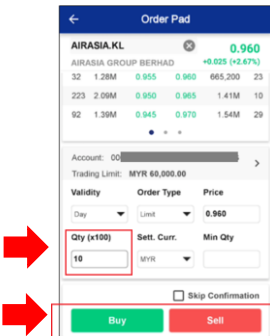At "Home" screen, click the icon at the upper left corner to see the "Menu"

Step 2:
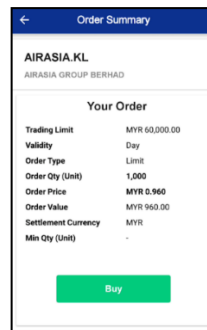Search the stock from the "Menu"
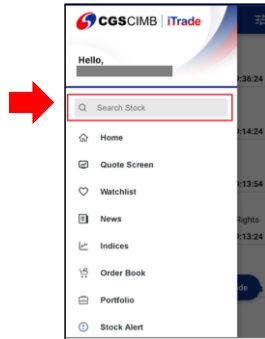
Step 3:
Filter by exchange and transaction type (e.g. "Normal Board Lot", "Normal Odd Lot"... etc)
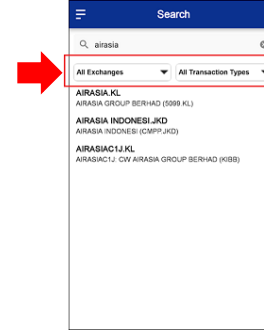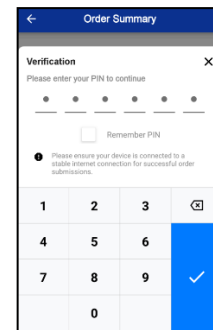
Step 4:
Insert buy/sell quantity then click the "Buy/Sell" button below
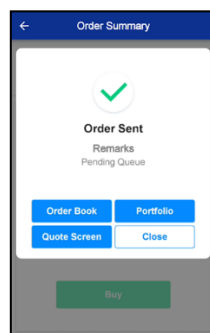
Step 5:
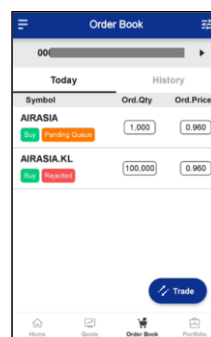Confirm your order at the "Order Summary"

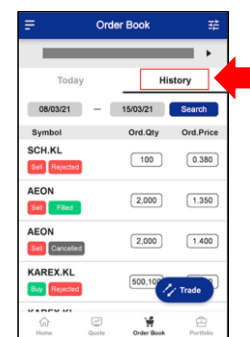**Step 6:**
Insert your 6 digits PIN number

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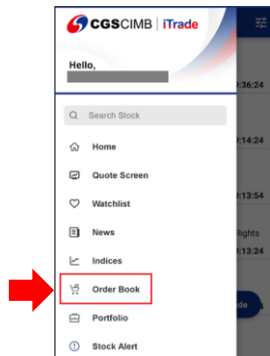
Tips:
To view the order history, click the "History".

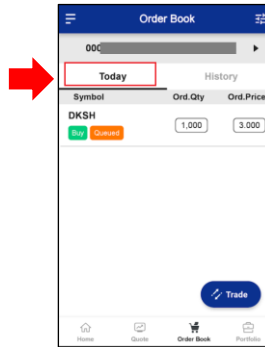| Check / Revise / Cancel Order	**How to check / revise / cancel and revise order?**

Step 1:
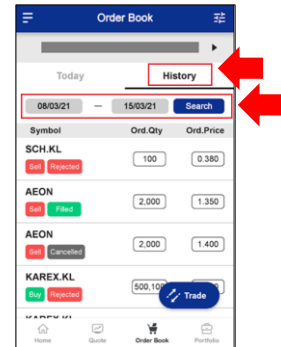Click here to access "Order Book" screen from "Menu"

Step 2:
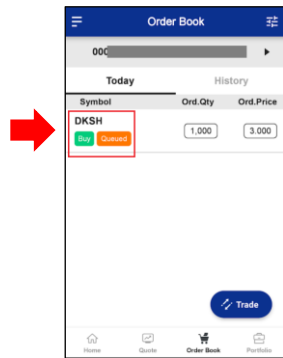You will see "Today" orders by default in the "Order Book" screen

Step 3:
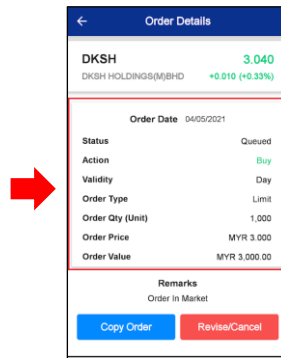For "History" orders, click here and search by date range

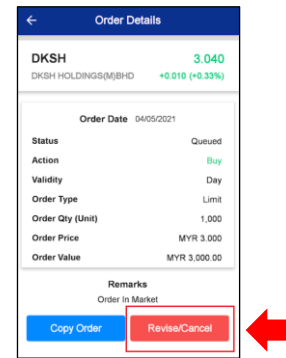**Step 4:**
To check the order details, click on the stock name

Step 5:
In the "Order Details" page, check your order details here

Step 6:
To revise / cancel your order, click here

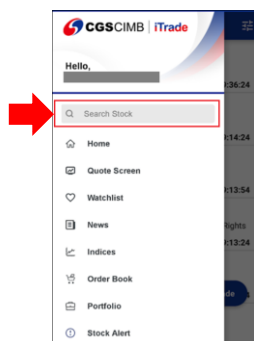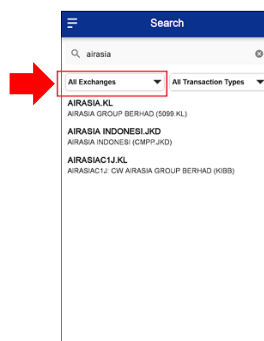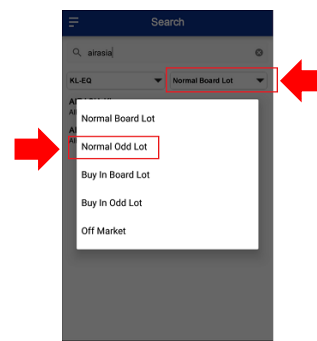| Normal Odd Lot	**How to search normal odd lot counter?**

Step 1:
Search the stock from "Menu"
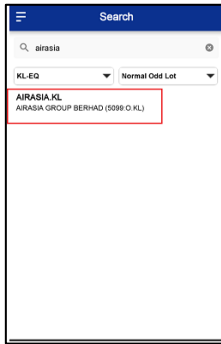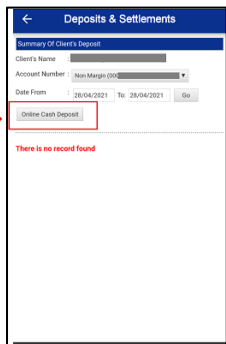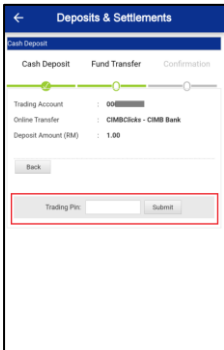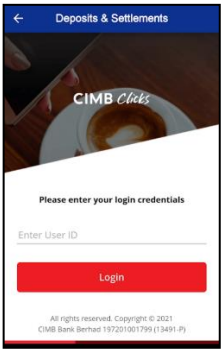
Step 2:
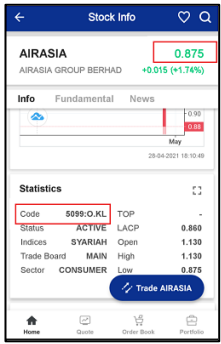Select the stock exchange from the "All Exchanges" list (e.g. KL-EQ)

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

Step 2:
Click the "Online Cash Deposit"

Step 5:
Key in your 6 digits PIN

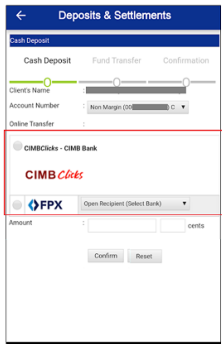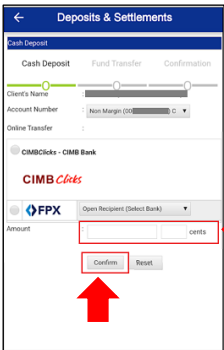**Step 3:**
Select the cash deposit method (Direct deposit with CIMBClicks or PFX)

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

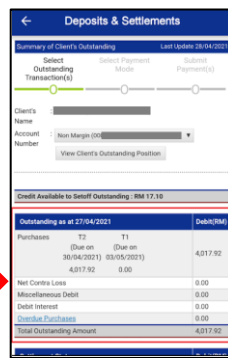|	
	Step 7: You will receive a notification of the cash deposit status. Or you can check the status in the "Deposits & Settlements" home screen
Settlement	**How to do settlement in iTrade mobile app?** **Step 1:** Go to "Deposits & Settlements" screen from "Menu", select "Settlement" **Step 2:** View your outstanding summary here **Step 3:** Check the box for outstanding settlement, and click "Pay" **Step 4:** Check the box if you wish to offset the outstanding with the Trust amount, and click "Submit" **Step 5:** Select to settle the outstanding with which bank and double check your final outstanding amount **Step 6:** You will be redirected to the online banking page. Login and complete the settlement process.
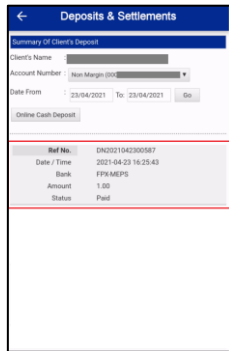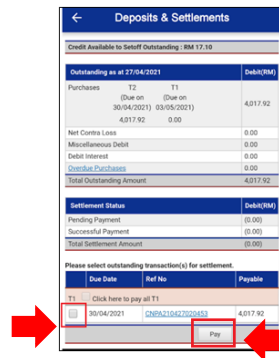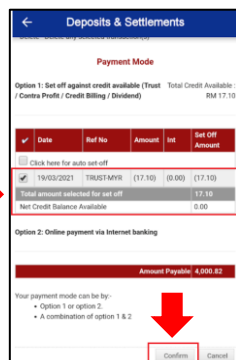
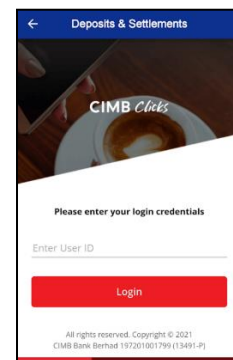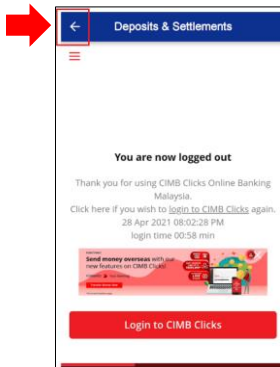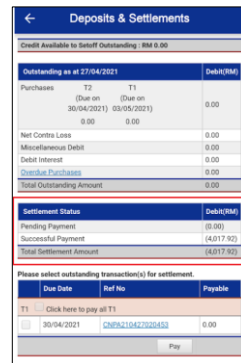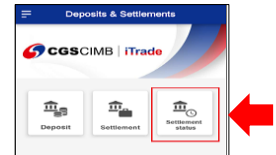|		
	Step 7: Click here to back to the "Deposits & Settlements" home screen	**Step 8:** You can view your settlement status here

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

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Stock Info (1)

Step 1: Search a stock in the "Menu"
Step 2: You will see the following information in the "Stock Info" screen
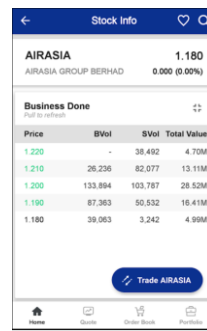
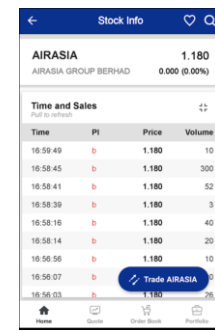Statistics   Market Depth   Business Done   Time & Sales
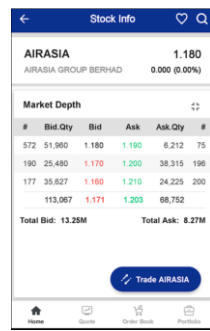
Tips:
Click the "Trade" button to place order.

Stock Info (2)

To view the "Analytic Chart" in full details, click here and <u>rotate</u> your phone to view in landscape view.
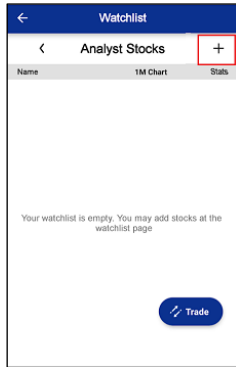
Landscape view

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"
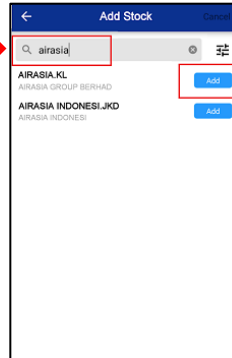
Step 6:
The stock has been added to the "Watchlist"
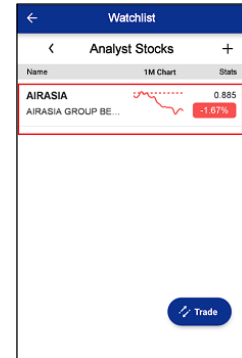
Tips:
1. *You can edit or delete an existing watchlist by swiping the watchlist to the left.*
2. *The same method is also applicable to delete existing stocks from the watchlist.*
3. *By clicking on <Name>, you can sort the stocks in your watchlist alphabetically.*
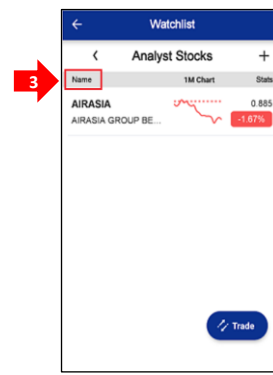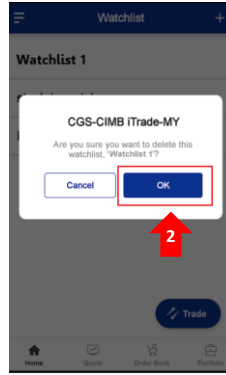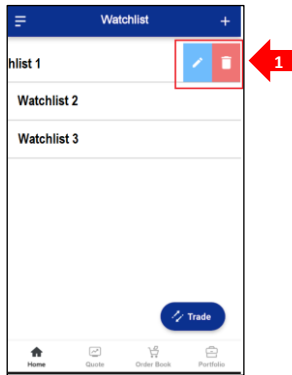
Reports	How to view summary reports from iTrade mobile app?

Step 1:
Click here to access "Reports" screen from "Menu"
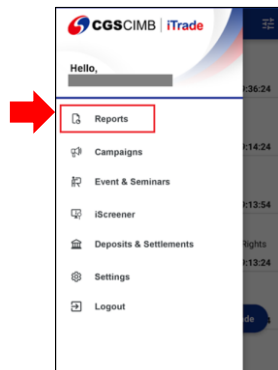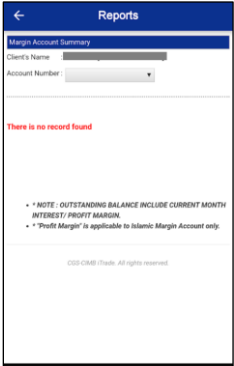
Step 2:
Select the report you want to view

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.*

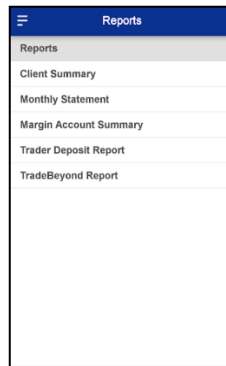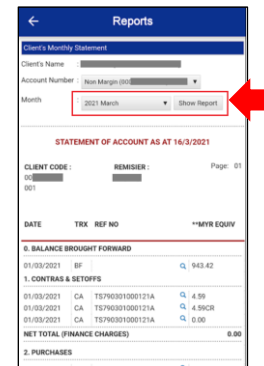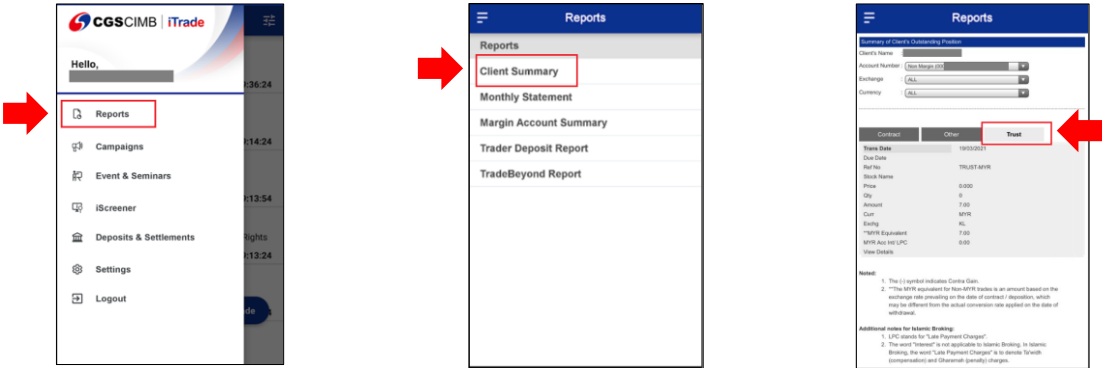| Trust Account	How to view my Trust account balance in iTrade mobile app?
	Step 1: Go to "Reports" screen from "Menu"
	Step 2: In the "Reports" home screen, click "Client Summary"
	Step 3: In the "Client Summary" screen, click here to view your Trust account balance

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"

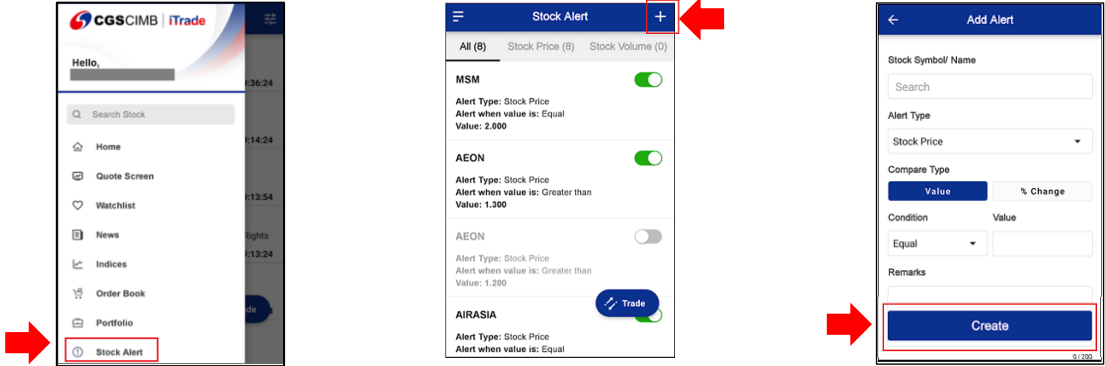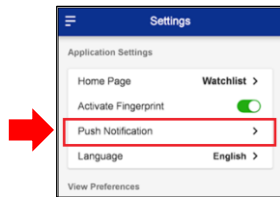|	
	Tips: • *In order to receive stock alerts, you must enable the "Push Notification" feature in "Setting" screen.* • *Once a stock alert is sent to you, the alert will be automatically disabled in the "Stock Alert" screen. If you still want to receive the same alert in the future, you must enable it 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:** 1) View the quote screen in different exchange 2) Click here to view the quote from different aspect
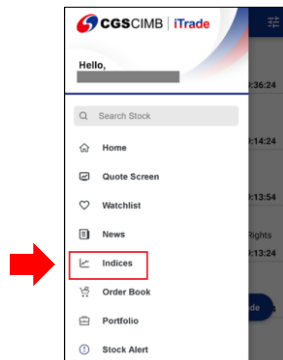
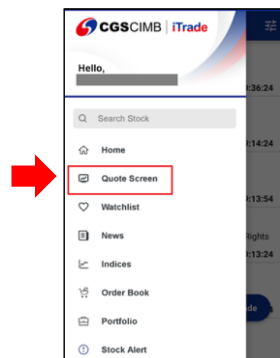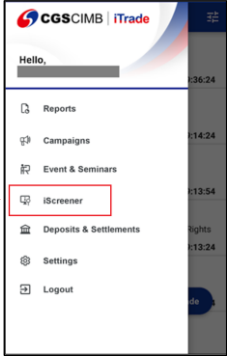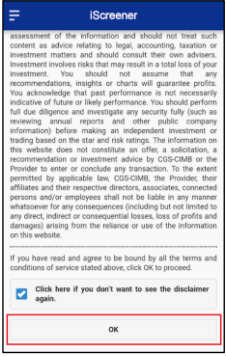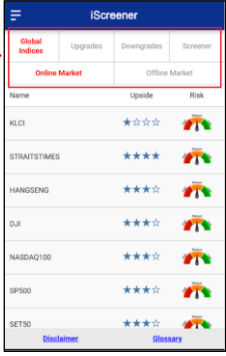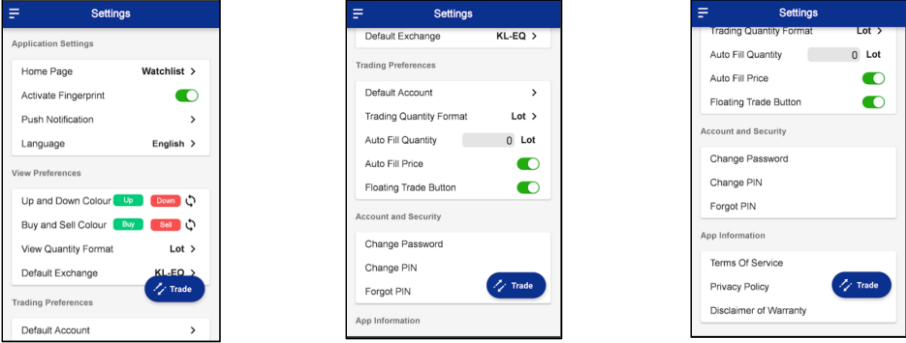|				
	Tips: *Switch between the icons for more view options*	**Search stock** 	**Heatmap View** 	**Filter by**
Campaigns, Event & Seminars	**Step 1:** Click here to access "Campaigns, Event & Seminars" screen from "Menu" 	**Step 2:** Click here to access "Campaigns, Event & Seminars" screen from "Menu" 		**Tips:** *This feature is a hyperlink to CGS-CIMB iTrade website.*
Search News	**How to search news in iTrade mobile app?** **Step 1:** Click here to access "News" screen from "Menu" 	**Step 2:** Click here to filter the news 	**Step 3:** Key in the details, and click "Apply" to search the related news 	

iScreener	**Step 1:** Click here to access "iScreener" screen from "Menu"	**Step 2:** Read the disclaimer and click "OK" to access	**Step 3:** Switch between options here to get the information you want to know

Settings	**What you can do in <Settings> screen?** • Set the default home page (Pick from "Dashboard, Watchlist, News & Indices") • Active/Inactive Fingerprint • Enable/Disable Push Notification • Switch Language *(coming soon)* • Set "View Preferences" • Set "Trading Preferences" • Enable/Disable "Floating Trade Button" • Change Password • Change/Forgot PIN • View App Information *(Terms of Service, Privacy Policy & Disclaimer of Warranty)*