st.george | Directshares

Platform quick guide

This concise guide is to help you familiarise yourself with the many features and tools available on the St.George Directshares Pro platform. Learn how to find stocks, trade a range of products, manage your portfolio, access market news, advanced charting and many other additional features that can help you to make the most of the platform

St.George Directshares Pro platfrom

This quick guide will help you get to know the following features:

1. Navigation tool bar and account

2. Product library

3. Dropdown menu navigation

4. Placing an order

5. Your account module

6. Your options account

7. International share trading

8. Margin loans

9. Watchlists

10. Advanced charting

11. Stock-specific market information

12. Module Linking

13. Market pulse and trading tools

14. Settings

15. Handy hints

1. Navigation toolbar and account

Access our advanced tools and features, switch layouts, set preferences and monitor your account

a. Enter a stock code or name in the 'Quick Search' field

b. Switch between different saved screen layouts. Click the settings icon to access further layout options.

c. Open the product library to search for and filter the products you want to trade or invest in

d. Open an existing watchlist or create a new one

e. Manage your existing positions and orders, and view your history, confirmations and statements

f. Get the latest market information with our market pulse tools, including ASX announcements and Reuters news

g. Access a range of Directshares trading tools, including a number of alerts to help you identify trading opportunities

h. Access standard platform, account forms, platform tour videos, contact details and terms of use.

i. The current value of your holdings

j. Funds available to place an order

k. Your currently selected account number and name. Click here to select a different trading account

l. Hide the account value details

m. Access preferences and settings

n. Securely log out of the platform

2. Product Library

Use the search and filter functions in the product library to find the products you want to trade.

a. Type in the name of the product you want to search for

b. Filter by the class of an instrument, including Equities, Index constituents, Warrants and Interest Rate Securities

c. Filter products by sector, industry group, derivative issuer or series

d. Click on a product's bid or offer price to open an order ticket

e. For international shares, we have included a new country filter when selecting Equities
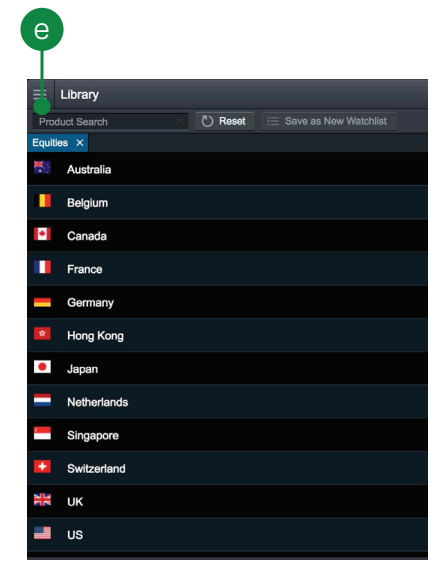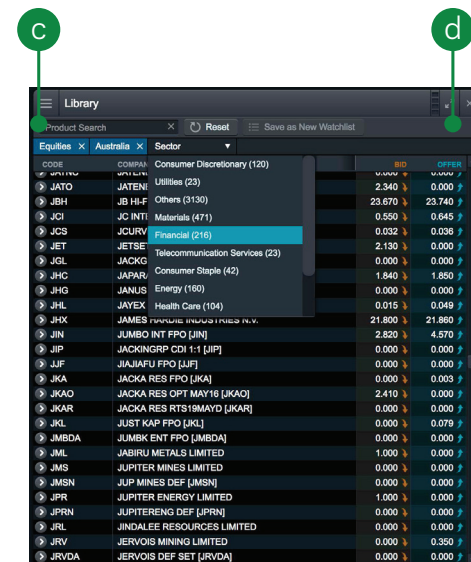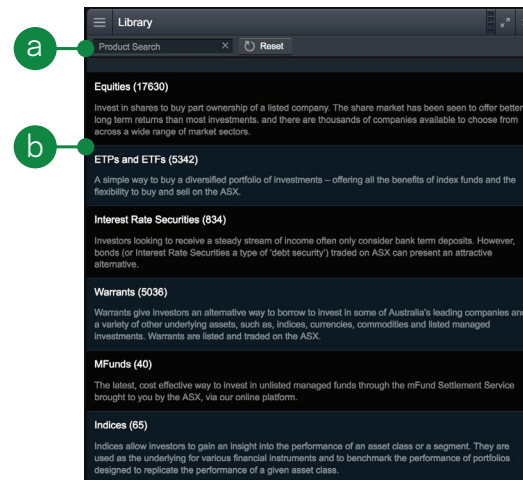
3. Dropdown menu navigation

Click the dropdown menu icon next to a product name to unlock product-specific options

a.   Open a new order ticket for the product

b.   Create a new alert for the product

c.   Add this product to one of your watchlists or create a new one

d.   Open a new chart for the product

e.   View important general information on the company selected

f.   View a quote panel

g.   Open a depth window for the product

h.   Open a course of sales window for the product

i.   View the full price history for the product

j.   View Reuters news articles related to the company

k.   View recent ASX announcements issued by the company

l.   View fundamental research from theScreener

m.   View Morningstar's Quantitative Equity Research report

n.   View all related Warrants for the product by expiry, type and strike

o.   View Options Finder for this product. This drop down menu is
     applied across all traders using ETOs, Equity ETOs and ETF eto's

p.   View all Interest Rate Securities associated with the product
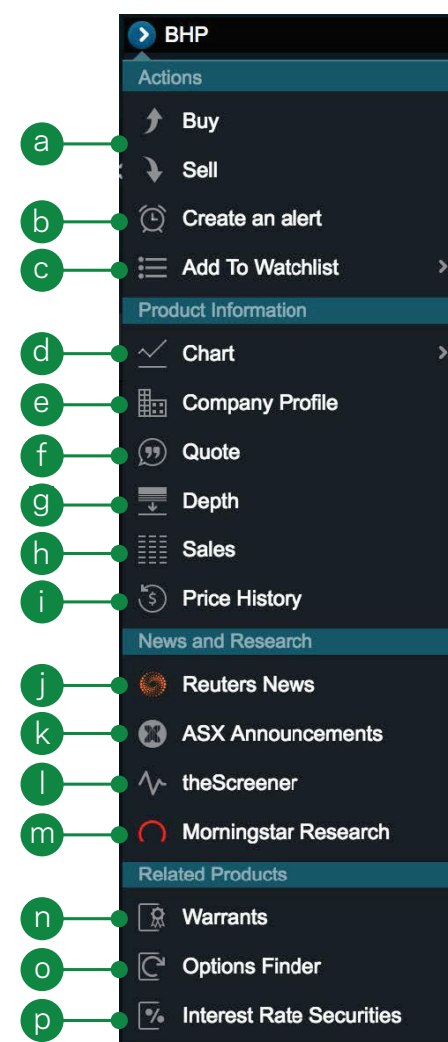
4. Placing an order

Click any buy or sell price on the platform to launch an order ticket

a. View the last traded price, current bid and offer prices, as well as depth or course of sales on the order ticket

b. Click on the bid, offer or last price to pre-fill the 'Limit Price' field

c. Click the buy or sell button to change the order type

d. Enter the quantity or $ amount you wish to buy or sell

e. Select the order instructions – choose between 'Limit', or 'Market'

f. Add an optional condition to the order, e.g. buy if the price is at or below $x.xx or Volume traded for the day reaches a certain level or the stock has traded a minimum volume. For Volume based conditions, we have moved the Conditions entry field into a separate section of the order ticket

g. Select an expiry – 'Good Till Cancelled' (GTC), 'Day Only', or a specific date

h. View the estimated brokerage and total cost of the order (buy trade), or total return (sell trade)

i. Add a stop loss order to protect against adverse price movements

j. Add a take profit so that you can automatically exit your position when an advantageous price is reached.

k. Stop loss and take profit orders can be 'limit', 'at market', or 'trailing orders'

l. Account selector - If multiple accounts are attached to a log in, then when you select the drop down menu in the top left corner, a new drop down appears at the top of the order ticket
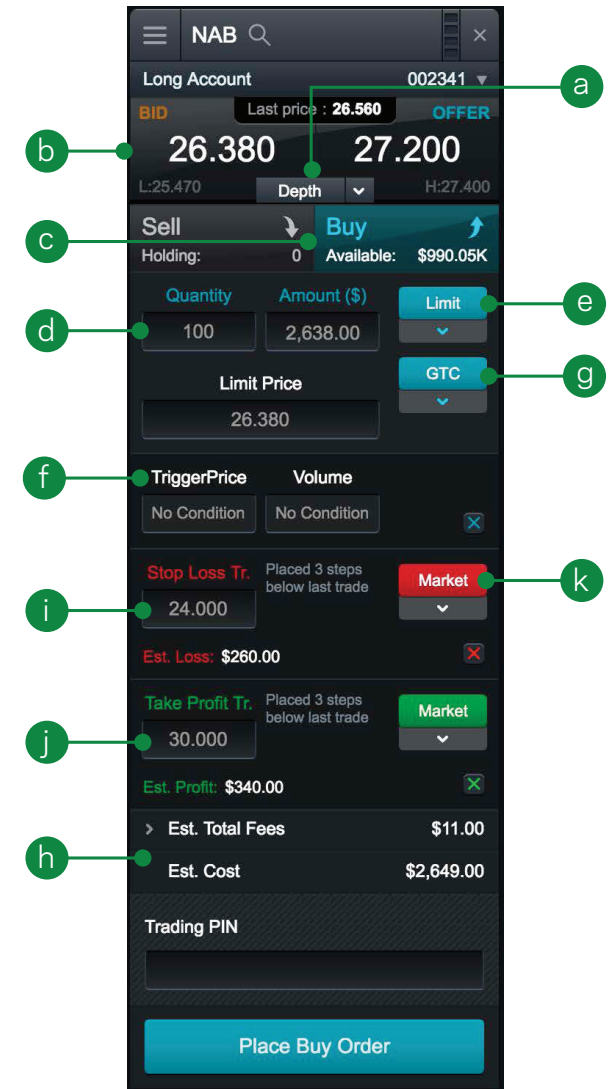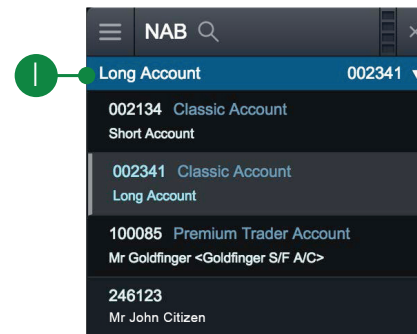
5. Your Account module

Click any buy or sell price on the platform to launch the order ticket

5.1 Positions

a. Change table settings, add, remove or rearrange data columns

b. Switch between the 'Positions', 'Orders', 'Profit & Loss', and 'History' tabs

c. View the product's context menu

d. Trade and pricing information

e. Market data from theScreener

f. Quantity recently bought or sold, and open sell orders

5.2 Orders

a. Modify or cancel the order via the context menu

b. The status of your order

c. Quantity that has been filled or that is unfilled and still on the market

d. Stop loss and take profit instructions

5.3 Profit & Loss

View and edit the quantity and average entry price of all holdings and see real-time profit or loss data for all your holdings.

5.4 History

This module provides you with a line-by-line history of all orders, as well as any online receipts or invoices and alerts. Click the pop-out icon to view the full details of an entry.

5.5 Confirmations

View and download all trade confirmations by selecting 'Account' then 'Equity Confirmation'

Confirmations

Filter By Timeframe:

This Financial Year ▼   CSV ▼   Download

CODE		CONFIRMATION #	ORDER TYPE	TRADE DATE	SETTLEMENT DATE	PRICE	QUANTITY	BROKERAGE	GST
AAL:US		1963158	Buy	09/01/2018	11/01/2018	51.4000	100	29.95	0.00
1301:JP		1963235	Buy	19/01/2018	23/01/2018	68.3235	20	9.00	0.00
NAB		1963490	Buy	23/03/2018	27/03/2018	7.5000	30	0.00	0.00

5.6 Statements

View and download full trading account and cash account statements by selecting 'Account' then 'Statements'

Trading Account Statement   Cash Account Statement

Filter By Timeframe: Last 4 Weeks ▼   PDF ▼   Download

Open Balance +/- $: -968.60   Close Balance +/- $: 0.00   Total Debit +/- $: 6,850.72   Total Credit +/- $: 5,882.12

DATE	REFERENCE	TYPE	VALUE +/- $	BALANCE +/- $	DESCRIPTION
25/05/2018	5581700	RG	963.58	0.00	Wdl SUNCORP 484-799 452799162 5551648
25/05/2018	5581696	RG	963.23	963.58	Wdl SUNCORP 484-799 452799162 5549577
24/05/2018	4410385	PG	-59.95	1,926.81	Dep SUNCORP 484-799 452799162
24/05/2018	4410381	PG	-740.05	1,866.86	Dep SUNCORP 484-799 452799162 5545357
24/05/2018	4410377	PG	-821.53	1,126.81	Dep SUNCORP 484-799 452799162 5546973
23/05/2018	109273	JG	59.95	305.28	JNL109273 Free Trade. Ref:5551648
23/05/2018	5551648	CB	-963.58	365.23	Bght 700 G13:SG @ 1.2908
23/05/2018	5550806	CR	969.58	-598.35	Reverse of Contract 5548466 G13:SG

6. Your options account

Locate the options finder tool by selecting from the dropdown next to a stock code.
This tool allows you to filter and build out your options strategies.

a. Enter the stock code to the underlying options security

b. Select from the list of pre-determined strategies

c. Select the expiry date from the menu

d. Select between American or European options

e. Select the number of strikes you want to display

f. You can refresh your settings with one click

g. Strike price is displayed

h. Enter number of contracts you wish to trade

i. If trading a Buy write, the underlying stock price will be displayed

j. Your estimated premium will display

k. Confirm your strategy by clicking 'Trade Strategy'

l. View underlying quote bar including dividend yield, historical and volume volatility

m. View selected 'Calls'

n. View selects 'Puts'

When placing an options trade, use the real time pay off diagram to help assess the strategy.
Once your strategy is complete, you can place a trade using the same module.
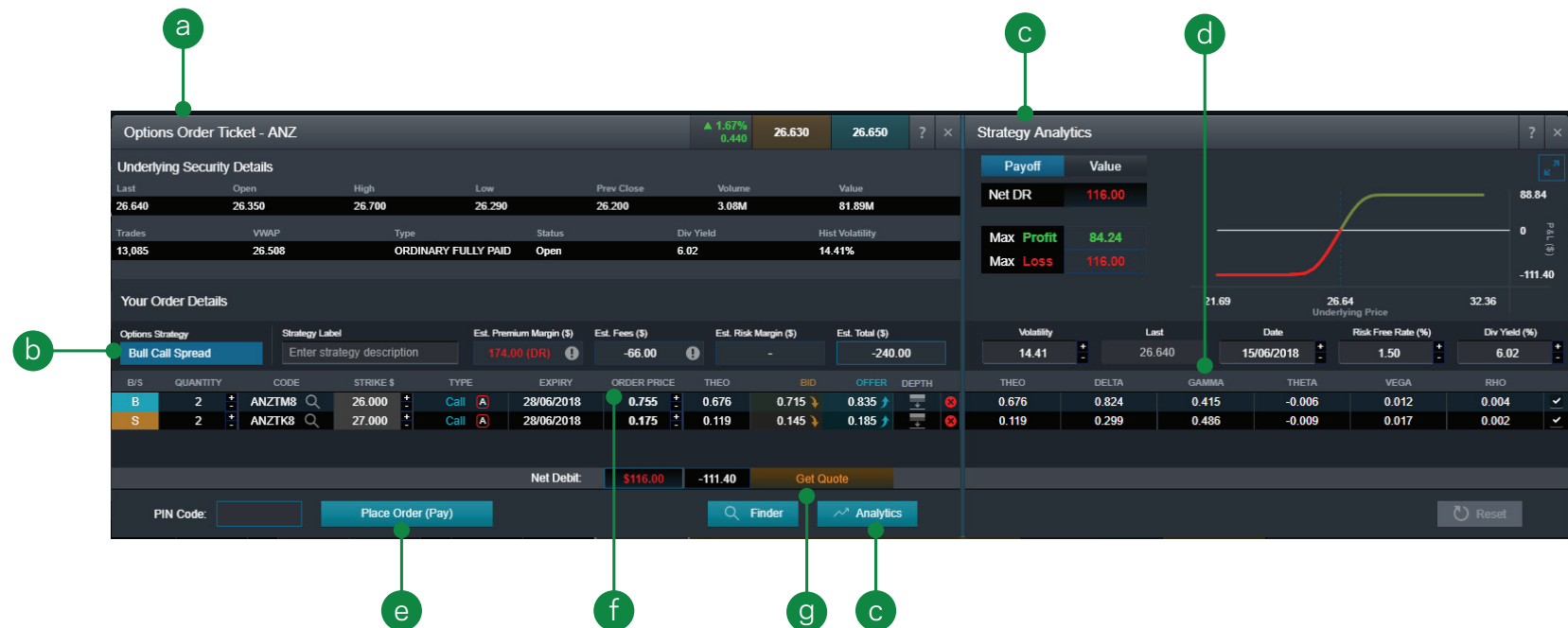
a. After selecting your strategy on the options finder tool you will be able to place a trade

b. Your strategy will display on the order ticket

c. Use the real time pay off diagram to analyse your chosen strategy

d. Change the variable fields (Volatility, Date, Risk Free Rate and Div. Yield) to assess the strategy

e. Once you've completed the setup of your strategy, click 'Place order'

f. Amend order price clicking on arrows will move the price by one tick

g. Ability to get a quote request from market makers. (RFG)

7. International share trading

Click any buy or sell price on the platform to launch the order ticket

a.   Enter the international 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

d.   Select the order instructions - 'Limit price'

e.   Select an expiry for your order – 'Day Only'

f.   Estimated fees, click to expand

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

Expiry definitions:

Day only - This type of order will expire at the end of the day if it has not filled
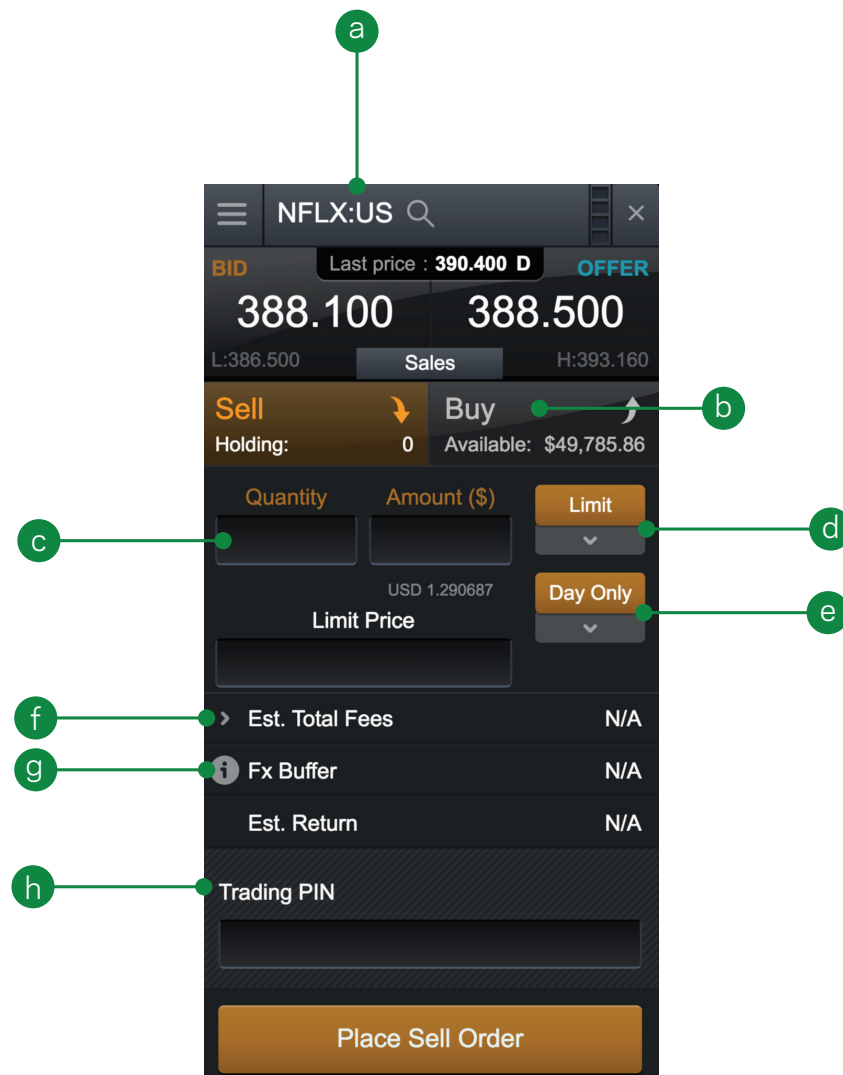
8. Margin Loan

Trade online in real-time using a margin loan from a linked margin lending account

Your margin loan is fully accessible on the Pro platform. You can view your current loan details, investments and collateral, as well as trade online with authorisation from your lender provided in real-time.

a. Access the Margin Loans module from the Account menu when you have a margin account selected

b. Key loan details are provided at the top of the module. This data is provided in real-time by your lender

c. View a list of current investments, with lending values and ratios

d. View any collateral lodged with your lender

e. View details of managed funds held on your loan

f. View examples of your borrowing power at different lending ratios

9. Watchlists

Create watchlists containing your preferred products to watch and respond to market movements

a. Create a new Watchlist, then add products using their dropdown menus or simply drag and drop a product onto the watchlist module

b. Use the 'Settings' menu item to rename the watchlist or change the colour of the module. Use 'Table Settings' to add, remove or re-order data columns

c. Sort watchlists by code, name (if selected in options), or price

d. Click a bid or offer price to open an order ticket

e. Add purchase details, this is useful for tracking real purchases or "what if?" scenarios

f. Add products quickly, just hit '+' and start typing to find the stock

10. Advanced charting

a. Charts include 97 indicators, 39 drawing tools and pattern recognition scanner

b. You can set individual intervals, timeframe, drawing tools and technicals as favourite

     i. Quick links to these favourites are then added to the chart interface for easy access

c. Save up to five chart presets. We will automatically save the first chart that you open for a product into saved chart position 1. To open multiple saved charts for the same product you simply select the desired saved chart through the products context menu

d. Display volume with the ability to add a number of volume indicators:

     i. Volume by price
     ii. Price volume trend
     iii. Volume flow
     iv. Volume accumulator
     v. Volume oscillator

e. The Pro platform will automatically save any chart analysis so when you close a chart down and reopen it, it will look exactly the same as you left it

f. You have the ability to fully customise the colours of all features, including background colour by selecting 'Settings' in the top right corner, and then save this as default
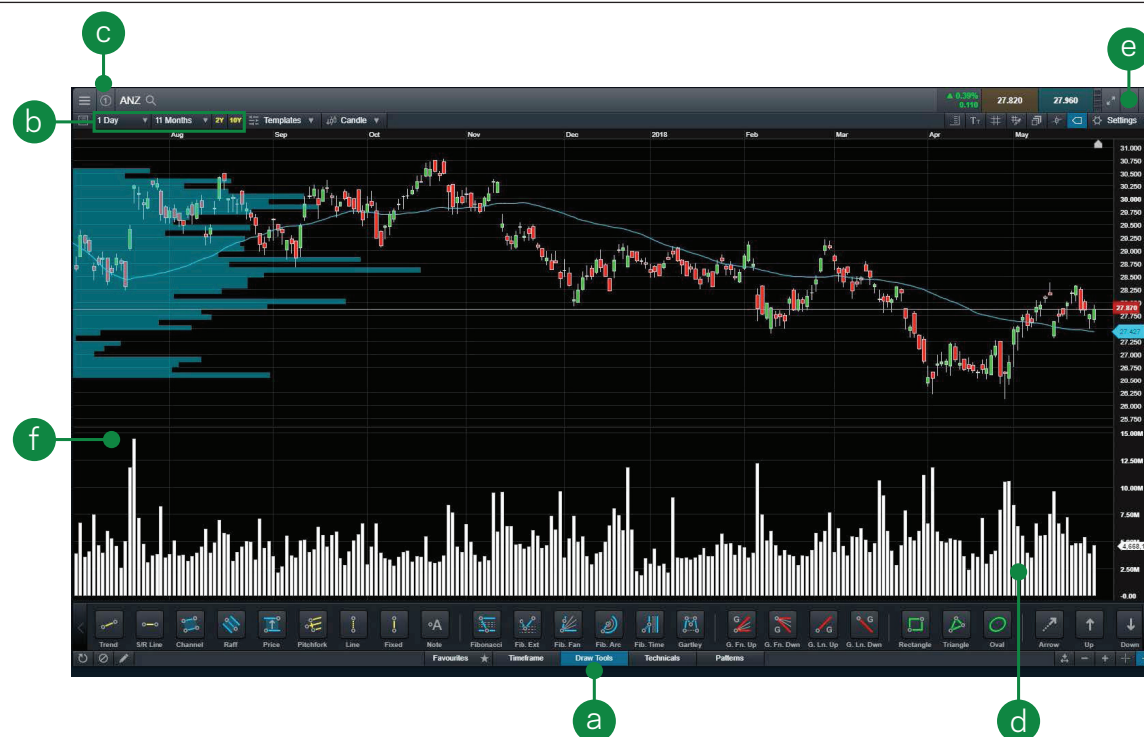
Comparison charts
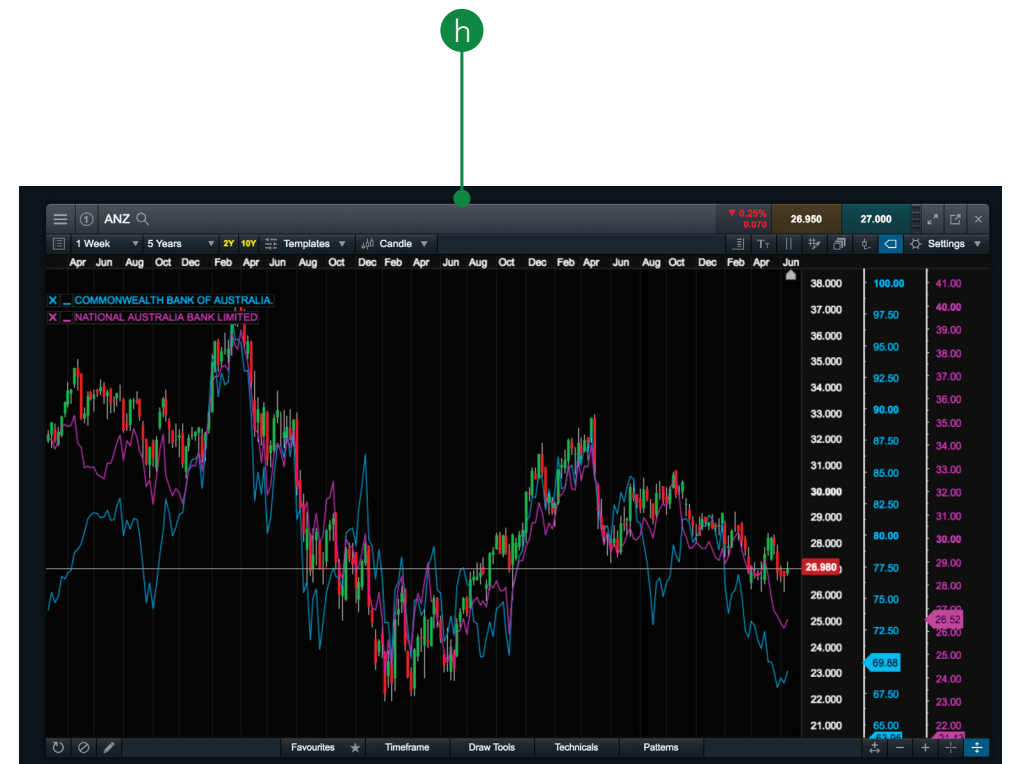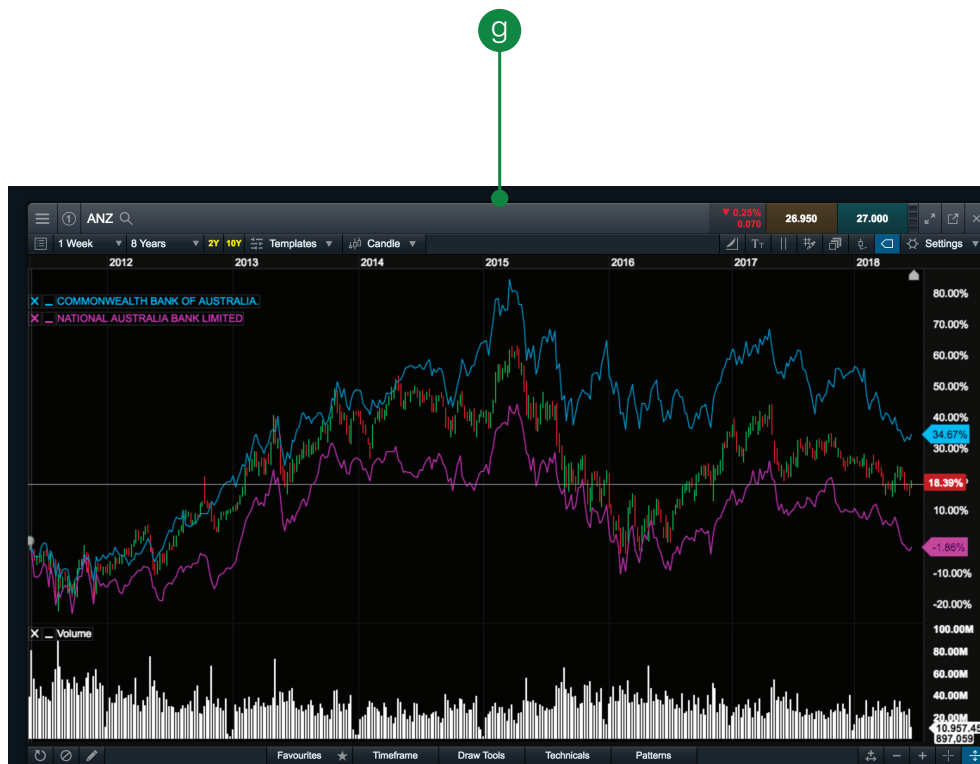
g. Compare the price action of multiple products on one chart. Simply drag and drop a product from your Watchlist into the price action area of any open chart and release

h. To display relative performance, change the Axis Style to 'linear' and the chart will update accordingly. This display shows multiple price axis on the right hand side

11. Stock-specific market information

Stock-specific modules give you the full picture on any product that you select. By using module linking you will be able to switch between your favorite products with speed and ease.
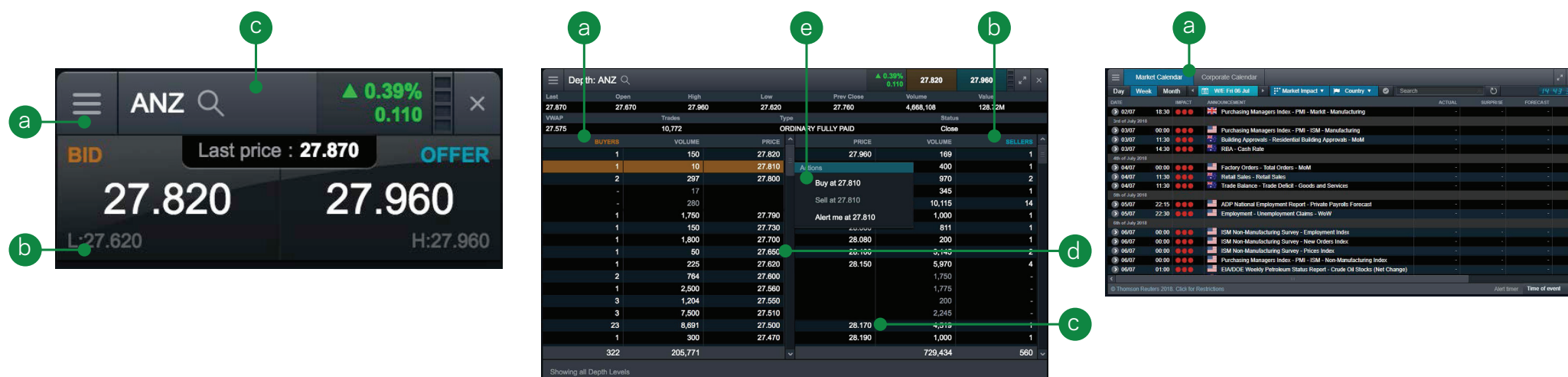
11.1 Quote Panels

a. Drag a product to the desktop, use the product context menu or use the quick search field in the header to open a quote panel

b. View current bid and offer, last price, and high and low prices for the day as well as daily performance values

c. Use the magnifying glass to change the stock code

11.2 Depth

a. All buyers at all price levels

b. All sellers at all price levels

c. Click a price to expand and see details of individual orders at that price level

d. Price of stock in the market

11.3 Market Calendar

a. Use the Market Calendar to view the latest economic data releases from across the globe and set reminders for future updates

11.4 Market Calendar - Corporate Calendar

11.5 Sales

This module displays the 'course of sales' for the selected product

11.6 Research

View upcoming dividends for all ASX-listed companies, including ex-dividend and pay dates, cents per share and franking percentage along with comprehensive fundamental research data

11.7 News and ASX announcements

These modules display Reuters news and all announcements released to the ASX. In order to make the information displayed here relevant to a product you are interested in, use the module linking function. You can also click on 'pdf' to launch more information

12. Module linking

a. Select a colour tile on multiple modules to link them together. Now if you change the stock code in one module, it will change for all the linked modules
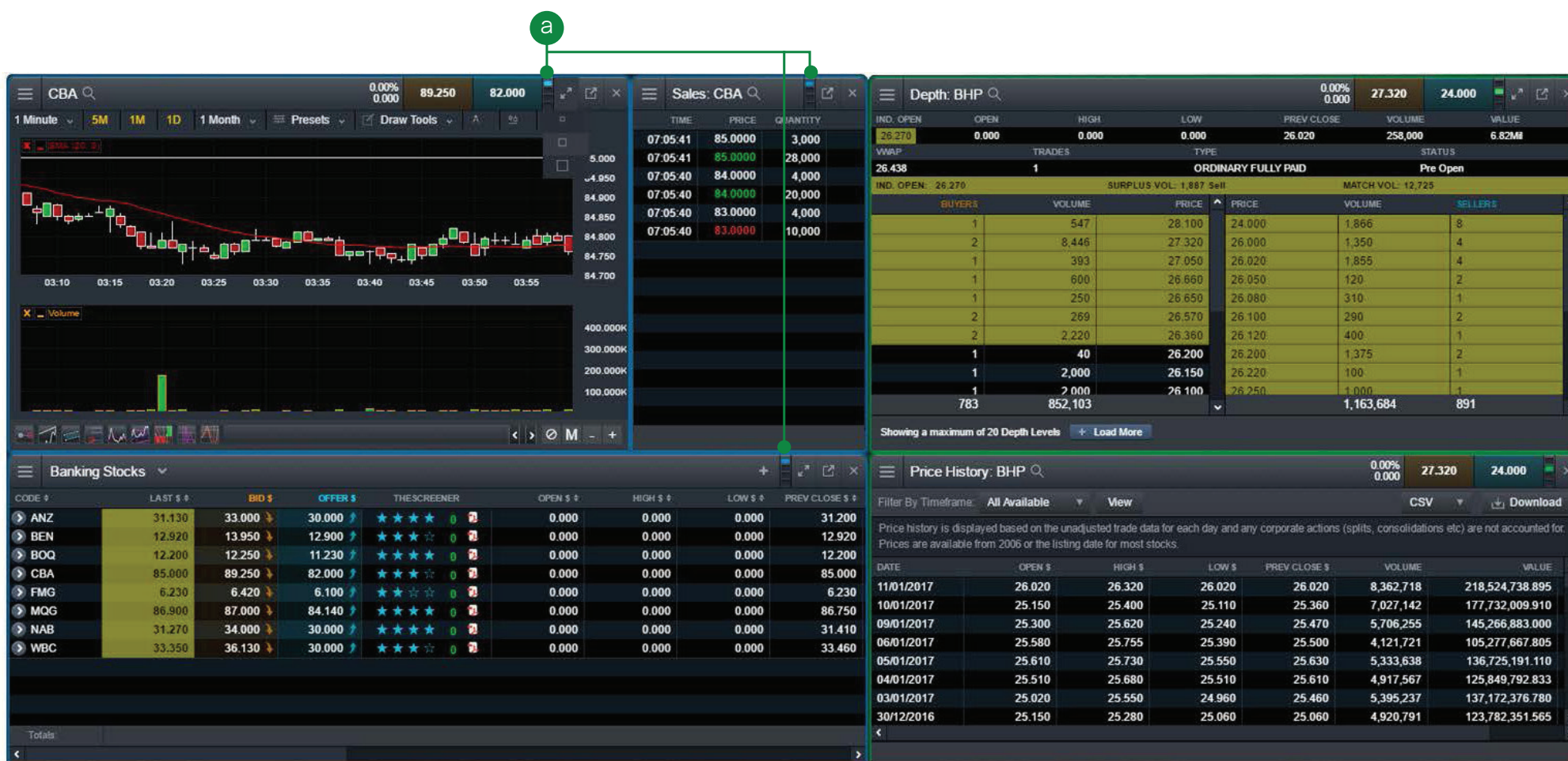
13. Market pulse and trading tools

Get the latest news and configure alerts on your favourite products

a. The 'Alerts' column has been added to Watchlists, Positions, Orders and P&L modules highlights if any news has been reported within the last 24 hours

b. View ASX Announcements as they are released to market, select 'Market Pulse' then 'ASX Announcements'

c. "Movers and Shakers" displays today's biggest movers, select 'Market Pulse' then 'Movers and Shakers'

d. The Alerts module allows you to set alerts based on price, volume, announcements or status, with alerts being sent by email or SMS. You can also purchase 'Alert Credits' in this module to cover the nominal cost of email and SMS alerts

e. Alerts and order notifications will pop up on the platform as they happen

14. Settings

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

a. Change your login code, password, trading PIN, email address or mobile phone number

b. Manage and opt-in to various Directshares email communications

c. Manage your 'Market Data' package – select delayed, live (click to refresh) or dynamic (streaming) data

d. Enable or disable a trading PIN on your account. We recommend the use of a trading pin for additional security, however we also give you the option to disable it if you wish

e. Select how long the platform should keep you logged in if you are not actively using it. Shorter periods are recommended for public computers, but you can choose whichever period best suits your needs

f. Set other preferences including personalisation of page refresh
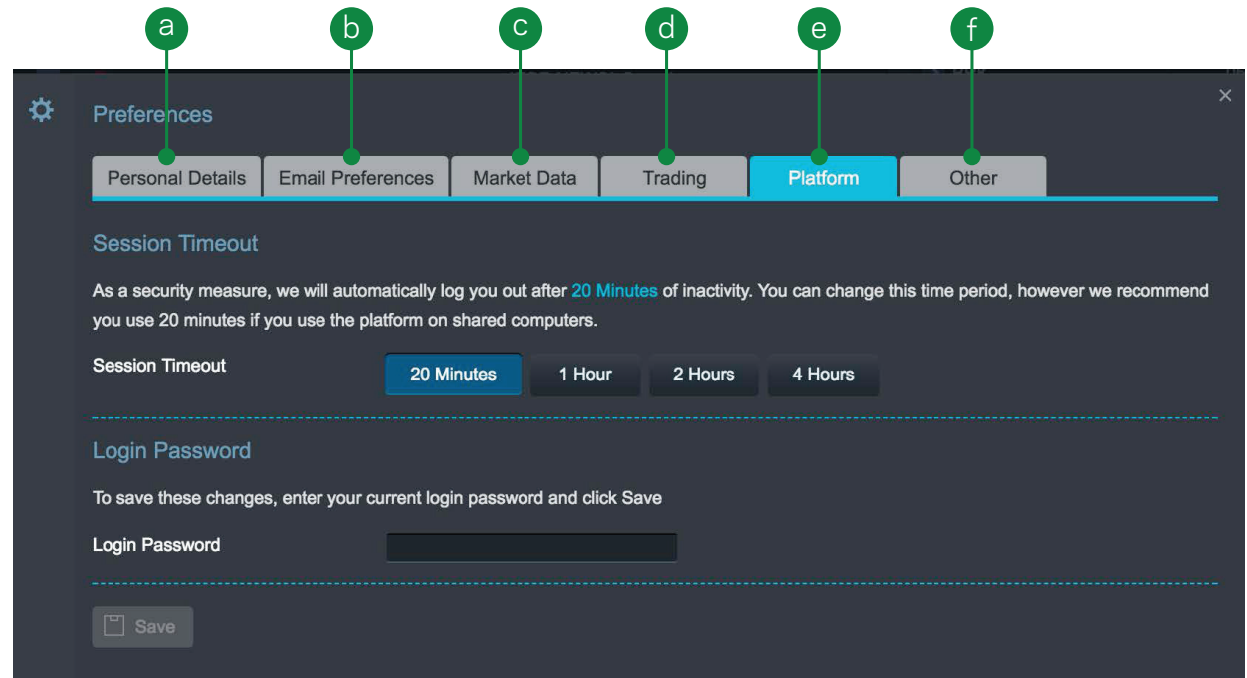
15. Handy hints

Additional features you can use to make the most of the platform

a. 'Quick Search' provides an option to choose the default module (chart, ticket or quote panel) that is loaded when selecting a product

b. You can drag and drop a product into an existing watchlist, onto your platform screen to open a price quote window, or over an open chart to quickly change the product you are looking at

c. You can 'Pop out' most modules from the platform to monitor or place trades while viewing other websites or applications

d. Double-click anywhere in the module headers to make the module go full screen (double click again to go back to the previous state)

e. Scan multiple products quickly over multiple chart intervals using the module linking feature, you can also simultaneously update modules including charts, order tickets and research on a single product

f. 'Organise' and 'Resize' layout options when opening the platform. This feature, when selected will organise your platform into

a clean looking format either vertically or horizontally (whichever will fit your screen best)

g. Automatically save layout changes (enabled by default) and position new windows into gaps within the layout. Click the 'cogwheel' to open 'Layout Selector'

h. Live chat is available from Monday morning to Saturday morning to coincide with world market opening hours. Easily accessible by clicking 'Support' then 'Chat online now' in the drop down menu.

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