An OCBC Company Asia's global private bank

# Digital Services

# User guide



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The information shown is for illustrative purpose only and is not and should not be construed as an offer or a solicitation to deal in any investment product.

# Getting started

Already have a Digital Services account with Bank of Singapore?

### Follow these steps to get started:

- 1. Download the new Bank of Singapore Digital Services app.
- 2. Launch the app on your iOS/Android device.



# Signing in for the first time

1. Launch the Bank of Singapore Digital Services app and tap **Sign in.** 



2. Enter your username and password and click **Sign in** or tap at the bottom to sign up for an account.



# Navigating the Bank of Singapore Digital Services app

Our new navigation bar makes it easier for you to manage your wealth, act fast on informed decisions, and chat with us.

#### Home

Get an overview of your accounts and portfolios.

#### Watchlist

Create watchlists to track your favourite stocks.

#### Trade

Buy and sell equities, ETFs, warrants and rights on your own.

#### Insights

Select and view insights and research tailored to your interests.

#### More

Manage your in-app experience, privacy and security settings.



# Home

#### Everything you need to track and act on your accounts, portfolios, and markets.

- Quickly access your most used tools
- Check your portfolio health at a glance
- Track your wealth with clarity





- Switch between accounts easily
- Receive personalised investment/research information based on your subscription preferences

## Account overview

View your Net Asset Value (NAV), assets, liabilities, cash balance, unrealised profit and loss (P&L) in one place.



### Personalised insights

Read insights that have been selected for you based on your subscriptions.



# Snapshot

### Get a quick idea of how your individual portfolio is doing.

Launch the app and tap **Snapshot** to see the performance of your selected portfolio.



# Setting up Snapshot

1. On the More tab, tap App personalisation.



2. Slide to enable Snapshot.



# Setting up Snapshot (continued)

3. Select your preferred portfolio.



4. Success! You've set up Snapshot.



# Viewing your portfolio details

From **Home**, tap on the **portfolio** you want to know more about.

For a single portfolio, tap **Analysis and portfolio details**. If you have multiple portfolios, tap **View all portfolios** to see the full list of portfolios in the account.

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Home	Ļ O	C D
eStatement Transactions	Place trade My positi	oo ions Mo
Net Asset Value > Account 9999999999 25.200M USD		
Assets > 20.000M Unrealised P&L 1.000M	Liabilities > 4.900M Cash balance > 10.100M	<i>(i)</i>
Portfolio snapshots (5)		
CLAMPETT JED 9999999999-1 22.000M USD	VTD YTD	Return 1.11%
CLAMPETT JED 99999999999-2		
-1.000M USD	YTD → & ade Insights	Return 2.22% More

CLAMPETT JED Advisory portfolio 9999999 Net Asset Value 15.100M USD	999-1 YTD Return <b>+1.11%</b>	
Assets > 20.000M	Liabilities > 4.900M	
Unrealised P&L 1.000M	Cash balance > 10.100M (i)	
Analysis and por	rtfolio details >	

9:41	o all ≎ D
Home	¢°Q ₽
Portfolio snapshots (5)	
CLAMPETT JED 9999999999-1	
11.000M USD	YTD Return +1.11%
CLAMPETT JED 9999999999-2	
-1.000M USD	YTD Return -2.22%
CLAMPETT JED 9999999999-3	
3.100M USD	YTD Return +3.33%
Show all p	portfolios
Recent transactions	i
Sun, 10 Sep 2023	
New Deposit	È ₿ 🗄 de Insights More
	_

### **Portfolio overview**

View your portfolio name, portfolio number, Net Asset Value (NAV), margin and limits, portfolio performance and asset allocation in one location. To switch between portfolios, tap the icon and select the portfolio you wish to view.





## Track your asset class positions

Go to the **Positions** tab in portfolio view.

See all your positions at a glance.

You can also tap the card, followed by the **Position** tab to view details of each position.







# Check e-documents related to your portfolio

- 1. Go to the **Documents** tab in portfolio view.
- 2. Tap the document to view it on your device instantly.
- 3. Tap **Filter** to choose which documents you want to access.



### Generate and view adhoc statement

- Go to Home page > Shortcuts and click
   Generate Adhoc
   Statement or View
   Adhoc Statement.
- 2. You can also go to Documents tab in portfolio view and click **View / Generate Adhoc Statement**.
- Select portfolio/s you wish to generate the adhoc statement, date range and language, then tap Generate Adhoc Statements.







# Generate and view adhoc statement (continued)

- 4. For multiple portfolios, you may select up to 5 portfolios to generate adhoc statements.
- 5. Review the details then tap **Submit**.
- Success! You have submitted a request. Go to View Adhoc Statement page to retrieve your statement/s.

Generate Adhoc Staten	nent Reset	── Generate Adhoc Statement	Generate Adhoc Statement	
ortfolio(s)	Reset	Portfolio(s)		
Q Search		My Portfolio Discretionary portfolio 999999999-1		
u can select only up to 5 portfolic noc statement will be generated tfolio selected.	os at a time. One for each	Date range Yesterday	The document will be generated in PDF	form
AMPETT JED 999999999		Language	Portfolio(s)	
<b>/ly Portfolio</b> Discretionary portfolio 999999999	0-1	English Adhoc Statement generated will be in PDF format.	My Portfolio Discretionary portfolio 999999999-1	
hildren Portfolio iscretionary portfolio 123456789	91-2		Date range Yesterday 19 Jul 2024	
AMPETT & WIFE 999999998			Language English	
usiness Portfolio dvisory portfolio 999999998-1				
HER ACCOUNT 999999997				
selected portfolio(s)		Submit	Generate another statement	
selected politiono(s)				
Select		Back	View adhoc statement	

# Keeping track of market movements with Watchlist



# Create a watchlist

On the **Watchlist** tab, tap **Create a watchlist**.

You can also tap on the watchlist filter and click **Add a new watchlist**.



Enter a name for your

new watchlist and tap

Save.

# Add assets to your watchlist

1. Tap on Add an asset.



3. Choose which watchlist you want to add this asset to and tap **Save changes**.



2. Search for the stock you want and tap the  $rac{1}{2}$  icon.



4. Success! You have added the asset to your watchlist.



### Manage your watchlist

- 1. On the watchlist tab, tap the ℬ settings icon.
- Tap **Rename** to change the watchlist name. Press and drag the ≡ icon to re-arrange the order of assets. Tap the <sup>1</sup>/<sub>1</sub> icon to remove an asset from your watchlist.





# **Online Trading**

#### Monitor, buy, and sell equities across markets anytime.

Access equities, ETFs, warrants and rights in nine major exchanges around the world.

	Qs	earch for name or F	RIC code		Q	Search for name or RIC o	code		Q	Search for name or RIC	code
Marke	et ove	rview	Order book	Mar	ket ove	erview Or	der book	Mar	ket ove	rview Or	rder book
SGX	~	Stocks 🗸 To	op Volume 🗸 🗸	NASDA	Q 🗸	Stocks 🗸 Top V	/olume 🗸	нкех	~	Stocks 🗸 Top V	/olume
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Symbol		Name	Change	Symbol		Name	Change	Symbol		Name	Change
<b>S51</b> SGX	:	SEATRIUM Stocks C M	+0.002 +1.48%	EBET NASDAG	:	EBET INC ORD Stocks SIP	+0.015 +37.53%	<b>8612</b> HKEX	:	WORLD SUPER Stocks	-0.142 -67.94%
<b>Y92</b> SGX	:	THAIBAV Stocks M	-0.005 -0.85%	AXLA NASDAQ	:	AXCLA HEALTH INC Stocks	+0.337 +289.94%	<b>2007</b> HKEX	:	COUNTRY GARDEN Stocks	-0.030 -3.30%
<b>G13</b> SGX	:	GENTING SING Stocks C M CD	+0.005 +0.55%	MULN NASDAQ	:	MULEN AUTMTV ORD Stocks SIP	-0.003 -0.57%	<b>0939</b> HKEX	:	CCB Stocks	-0.010 -0.24%
<b>039</b> SGX	:	OCBC BANK Stocks	+0.070 +57%	TSLA NASDAQ	:	TESLA INC Stocks	+18.360 +7.69%	<b>3988</b> HKEX	:	BANK OF CHINA Stocks	-0.010 -0.37%
<b>5LY</b> SGX	:	MARCOPOLO MARINE Stocks C M	-0.002 -4.00%	<b>TTOO</b> NASDAG	:	T2 BIOSYSTEMS ORD Stocks	-0.063 -18.93%	<b>1398</b> HKEX	:	ICBC Stocks	-0.020 -0.56%
<b>Z74</b> SGX	:	SINGTEL Stocks	0.000	MARA NASDAQ	:	MARATHN DGTL ORD Stocks	+3.060	<b>3333</b> HKEX	:	EVERGRANDE Stocks	-0.030 -10.00%
5WH	:	REX INTL	-0.003	NVDA	:	NVIDIA CORP	+19.490	0788	:	CHINA TOWER	-0.010
E Home	Wate	chlist <b>Trade</b> I	Sector Se	Home	Wat	≓	hts More	Home	Wat	chlist Trade Insig	ghts Mc

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# Launch the Online Trading module

1. From Home, tap the Trade tab.



2. If this is your first time accessing Online Trading, you'll have to accept the Online Trading terms of use and the market data terms and conditions.



## Explore instruments across eight major exchanges

The **Market Overview** tab displays a default list of instruments.

Tap on the drop-down filters near the top of the screen to choose the exchange centre, instrument type and top options to view a customised list.

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	Q 9	Search for name o	r RIC code	
Mark	et ove	rview	Order b	ook
SGX	~	Stocks 🗸	Top Volum	e v
Quotes a	re del	ayed up to 15 mir	nutes. 🛈	
Symbol		Name	Ch	lange
<b>S51</b> SGX	:	SEATRIUM Stocks C M	+0 +1	.002 .48%
<b>Y92</b> SGX	:	THAIBAV Stocks M	-0. -0.	.005 .85%
<b>G13</b> SGX	:	GENTING SING Stocks C M CD	+0 +0	.005 .55%
<b>O39</b> SGX	:	OCBC BANK Stocks	+0 +5	.070 7%
<b>5LY</b> SGX	:	MARCOPOLO MARINE Stocks C M	-0. -4.	.002 .00%
<b>Z74</b> SGX	:	SINGTEL Stocks	0.0	
5WH	:	REX INTL	-0.	.003
E Home	Wat	chlist Trade	& Insights	More



# Search for an instrument

First, type an instrument name or stock code into the search bar.

In the search results screen. To see more search tap on an instrument to see results, tap on Load more details.

more at the bottom of the screen.

9:41		ı¢ lıı.							
Q	Search for name o	r RIC code							
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SGX :	SEATRIUM Stocks C M	+0.002 +1.48%							
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G13 SGX	GENTING SING Stocks C M CD	+0.005 +0.55%							
O39 SGX	OCBC BANK Stocks	+0.070 +57%							
SGX :	MARCOPOLO MARINE Stocks C M	-0.002 -4.00%							
z74 SGX	SINGTEL Stocks	0.000 0.00%							
5WH :	REX INTL	-0.003							
E Home Wa	tchlist Trade	Insights M	ore						





### Place an order

 To begin trading, pick an instrument by tapping on it. In the details page, select Buy/ Sell. You can also tap **Buy** on an instruments' detail page from the **Trade** or **Watchlist** tab.

2. Pick the portfolio you want to place the order in.

> The available limit for your selected portfolio will be reflected.

9:41	e	
← OCBC BANK SGX: 039 (SG1S04	1926220) Stocks 🕻	6+
My Holding	Market I	nfo
13.0300 sgp		+0.09
182.6M		+0.70%
Market is Open Q	uotes are delayed by 15 m	ninutes 🛈
07 Aug 2023	Summary	
Range 12.94-13.08	Vol 1.673M	52W H
Open 13.08	P/E 7.62	52W L
Close 12.94	Mkt Cap 58.75B	Avg Vol
10 11 12 Ibardibardibardibardibar		13.08 <b>13.03</b> 13.01 12.97 <b>6.300M</b>
	POWERED BY REFIN	ΙΤΙΥ' 🧮
ISIN SG1S04926220		
Bid	Ask	
13.025	13.030	
47,900	26,900	
Sell	Buy	
_		

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	Q s	earch for name	or RIC code	
Marke	et over	view	Order book	
SGX	~	Stocks 🗸	Top Volume	~
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Symbol		Name	Change	
O39 SGX	:	OCBC BANK Stocks	+0.070 +57%	
<b>Y92</b> SGX	:	THAIBAV Stocks M	-0.005 -0.85%	
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SGX: 039	BC BA	<b>NK</b> 04926220) Stoc	ks C	
			(3+	
	Detail	S	Add to Watchlist	
Bid <b>13.025</b> 47,900		Asi 13 26,	8.030 900	
	Sell		Buy	

9:41			.ul 9	
X OCBC BAN	<b>JK</b> 15049262	220) Stocks	C	
<b>13.03</b> sgd 2.034M				+0.09
Bid	<b>13.00</b> 1,902K	Ask		<b>13.04</b> 110,764K
Market is Open	Quote	s are delaye	d by 15 m	inutes 🛈
Action				
Sell			Buy	
Portfolio CLAMPETT JED Advisory portfolio 9	9999999999	-1		$\sim$
Available Limit: 4,367	,900.40 US	D Indicative	2	
Order type Limit				$\sim$
_	Quai	ntity )		+
Lot Size: 100			Le	arn more
	Review	order		

# Place an order (continued)

Select your order type, quantity, and price, then tap **Review order**.

You may select from the following order types:

- Market Order
- Limit Order (Day and GTD)
- Stop Loss Market Order (Day and GTD)
- Algo order
  - Time-Weighted Average Price (TWAP) Limit or Market Orders
  - Volume-Weighted Average Price (VWAP) Limit or Market Orders

Good-till-date (GTD) orders are limited to a maximum of 30 days.

Ask 11 https are delayed by 15 min	+0.09 •0.70% 13.04 10,764K utes (	<b>13.03</b> sgd 2.034M Bid	13.00 Ask	+0.09	2023						
Ask 11 otes are delayed by 15 min	13.04 10,764K utes 🛈	Bid	13.00 Ask		1						Clear
otes are delayed by 15 min	utes 🛈	Manhart in One and	1,902K	<b>13.04</b> 110,764K	Maxim	um 30 d	ays				
999-1		Market is Open	Quotes are delayed by	15 minutes 🛈	Mon	Tue	Wed	Thu	Fri	Sat	Su
	$\sim$	CLAMPETT JED Advisory portfolio 9	999999999-1	$\sim$	Sep	tembe	r				
USD Indicative		Available Limit: 4,367	,900.40 USD Indicative		2	3	4	5	6	7	1
		Order type			9	10	11	12	13	14	15
	~	Limit		$\sim$	16	17	18	19	20	21	22
			Quantita		23	24	25	26	27	28	29
100	+	—	100	+	30						
Lea	rn more	Lot Size: 100		Learn more	Oct	ober					
ce (SGD)	+	Order type	_			1	2	3	4	5	6
13					7	8	9	10	11	12	13
	<b></b>	Limit		$\checkmark$	14	15	16	17	18	19	20
		Market			21	22	23	24	25	26	27
ew order		Algo						Apply			
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# Place an order (continued)

3. Review the details of your order and tap **Submit order** to proceed.

If you want to change the details of your order, tap **Back**.

4. Success! You have placed an order.

A **trade order ticket number** is issued for each order. You can find this below "Order submitted" or when you check on your active orders by tapping **View in Order book.** To place another order, tap on **Make another trade**.

5.41	
🔨 Buy Equity	
<b>DCBC BANK</b> GX: O39 (SG1S04926220) Sto	ocks C
Buy	
Portfolio <b>CLAMPETT JED</b> Advisory portfolio 9999999	999-1
Order type Limit	
Quantity <b>100</b>	
Price done (SGD) <b>12</b>	
Order is Good till 31 Aug 2023	
Estimated total (SGD) 1,219.25	$\checkmark$
By submitting this order, I acknow no recommendation from the Ba concentration risk, have been cor this investment is <b>suitable for m</b> e	vledge that there has been ank and all factors, including nsidered, in determining that e.
Submit o	order
Bacl	k



# Track current and past orders

- Tap on Trade in the bottom navigation bar, then select the Order book tab near the top of the screen. Your most recent orders are listed first.
- 2. Tap on an order record to view more details.
- 3. To filter search results, tap on **All orders** near the top of the screen and chose the filters you want to use.

Q Search for name or Market overview All Portfolios All orders Wed, 07 Apr 2021	Order book	×
Market overview All Portfolios All orders Wed, 07 Apr 2021	Order book	<ul><li>✓</li></ul>
All Portfolios All orders Wed, 07 Apr 2021	▼ ■	€
All orders Wed, 07 Apr 2021	× ≡	¥
Wed, 07 Apr 2021		
OCBC BANK SGX - 039 - Stocks Buy New		
Filled / Order Price	0 / 100 12.0000 SGD	:
ARB Corporation ASX - ARB - Stocks Sell Partially executed		
Filled / Order Price Execution Price	5 / 10 29.4500 AUD 29.4500 AUD	:
Mon, 05 Apr 2021		
Singapore Telecommunica	tions	
Home Watchlist <b>Trade</b>	E Insights Mo	ere

COLBC B/ SGX: 039 ()	G1504926	220) Stocks	
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Bid	13.00 1.902K	Ask	13.04 110,764K
Market is Open	Quote	es are delayer	1 by 15 minutes 🔇
Order details			
Buy			
Filled / Order			0/100
Portfolio CLAMPETT JI Advisory portfo	ED olio 999999	99999-1	
Order type Limit			
Order is Day Order			
Order price (5)	501		
ISIN ES0113900	37		
Order number EQ100012764	4-100044	75	
New			



# Configure your order alerts

- Go to More in the bottom navigation bar, then tap on Notifications.
- 2. If your **Order status** toggle is grey, tap on it to enable Order status notifications. It should turn green.
- 3. Once you have turned on notifications for Order status, a new option to change how you receive notifications will appear. To select or deselect SMS/ Email notifications, tap **Change** and adjust the toggles.







# Insights

#### Move fast and capture opportunities with around-the-clock access to market insights.

Access our library of investment articles here including our top picks, flagship publications and personalised insights based on your interests.



## Subscribe to articles based on your interests

1. On the **Insights** tab, tap **View all** on **Curated for you**.



2. Tap the 🛱 settings icon and select the categories that interest you.



# Subscribe to articles based on your interests (continued)

- 3. Tap Add a subscription and select the sectors and regions that interest you before tapping Add to my subscription list.
- You can also tap on More > Subscription preferences to edit your subscriptions in future.



# More features

#### Managing your app preferences and other features.

9	9:41			
Q	Search	¢ ₽		
	Clampett Jed Last login on 10 Sep 202	:1, 10:45 AM		
More	actions			
	E	i		
	Documents	Help centre		
Gene	ral settings Security Username, Password, Face 1	ID, Digital Token		
ţ	Notifications In-app, Email, SMS and push notification			
ЯŻ	Language Used in-app and for internet banking			
<b>00</b>	App personalisation Snapshot settings and app t	theme		
Hom	e Watchlist Trade	양 <b>태</b> Insights <b>More</b>		



### Changing your username or password

- Go to More in the navigation bar at the bottom of the app and tap Security.
- 2. Select Change username or Change password.





## Changing your username or password (continued)

- 3. Enter your details and tap **Save**.
- 4. Success! Your username/password has been updated.



# Enabling biometrics for app sign-in

1. Go to **More** > Security.



2. Tap the **Face ID** slider to enable hands-free sign in.



# Changing the in-app language

1. Go to **More** and tap on **Language** settings to select your preferred language.

You can also change this by tapping on the  $EN \sim$  icon on the top right-hand corner after launching the Digital Services app. 2. Tap Save to finish setting up your preferred in-app language.





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# Personalising your app theme

1. After launching the Digital Services app, go to **More** > **App theme** and select your preferred theme.





# Digital Token

# Activating your Digital Token

Use your Digital Token to experience seamless authentication with enhanced security on a single device.

You can now log in and approve transactions if Digital Token is activated on your bank registered device.

You will be able to generate Digital Token OTPs (one-time passwords) even while offline.

- Go to More > Security after signing in to the Digital Services app.
- Tap on the Manage Digital Token slider to activate your token. You will need to enter your username & password if you log in by biometrics (Face/Touch ID).





# Activating your Digital Token (continued)

- 3. Tap on Enable Digital Token on this device. A 6-digit SMS OTP will be sent to your registered mobile number.
- 4. After entering the SMS 5. Choose a 6-digit OTP, a 6-digit Email OTP will be sent to your registered email address. Enter the email OTP to proceed.
- Digital Token PIN to use when approving online transactions.



Note: Digital Token will be activated after 24 hours from the time of your first login for security reasons.

# Authorise using Digital Token

- Sign in to a secondary device or Digital Services website and navigate to portfolio view, a digital token authorisation request will appear.
- 2. On your primary device where digital token is registered, tap on the push notification received to authenticate.
  - 3. If you did not receive the push notification, launch the digital services app on your primary device, tap on **Digital Token** and approve.







# Visit our in-app Help Centre to discover more tips that will help you get the most out of our Digital Services app. Just tap on More > Help Centre.

9:41 • • • • • • •	9:41	.ıl ≎ ∎
Q Search 🗘 🕞	$\leftarrow$ Help centre	Q
Clampett Jed Last login on 10 Sep 2023, 10:45 AM	Watch Tutorials	4 features
More actions		000
Documents Help centre	Get Started Portfolio View	Custo Home
General settings	Frequently Asked Questions	
Security Username, Password, Face ID, Digital Token	What are the key features of Digit Services?	al v
Notifications In-app, Email, SMS and push notification	How do I get access?	~
月主 Language Used in-app and for internet banking	How do I register?	~
App personalisation     Snapshot settings and app theme	How do I sign in for the first time?	? ~
	How do I unlock my account?	~
Home watchist trade Insights More	View all	

#### Digital Services app | User Guide | Version 1.1

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