

# USER GUIDE FOR **MY PBSV**

How to quickly place orders and look up information with the My PBSV App



# HOME PAGE

## Quick access and actions

Select existing actions or customize quick actions to display

## Navigate between main screens

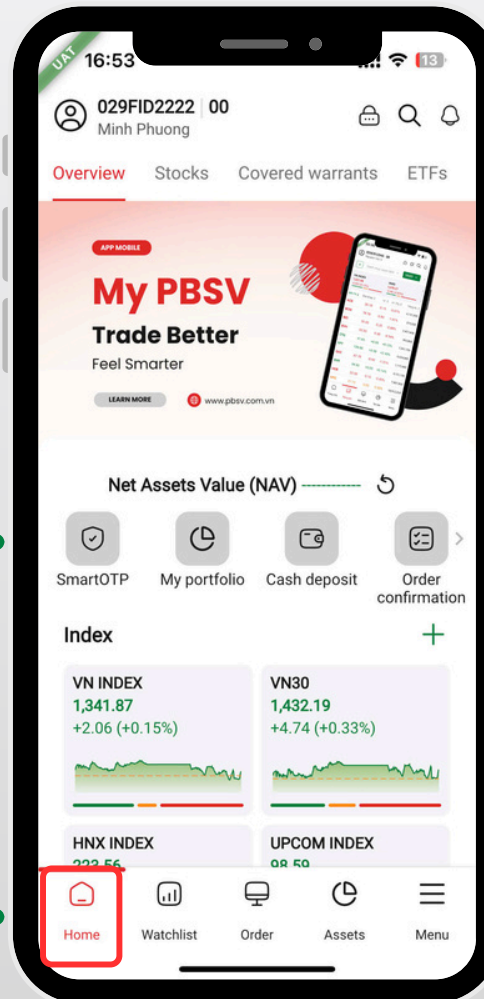
Quickly navigate between screens: Home, Market Board, Order Placement

## Track Stocks by Type

Swipe left or right to track the movements of different stock types: stocks, derivatives, warrants, and ETFs.

## Update Index Movements

Tap on the charts to view Index information or press "+" to add an Index to display



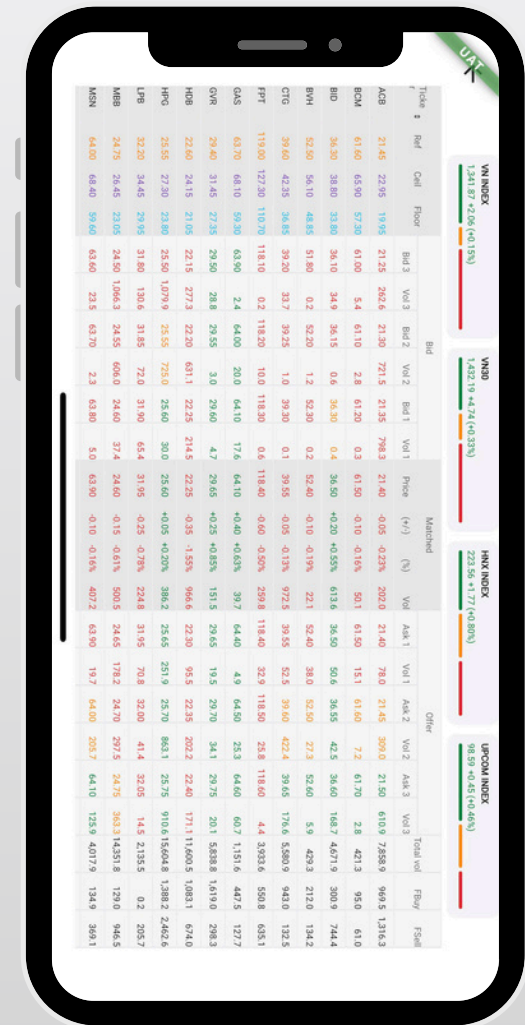
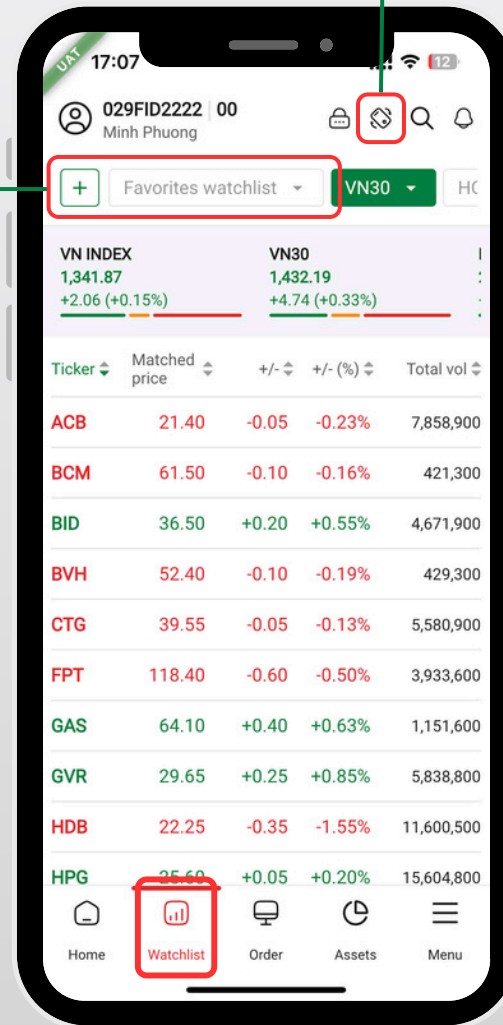
# PRICE BOARD

Click to view the full price board

Add/Select watchlist

## Display detailed information

Click on an Index/Stock Code to view detailed information about the Index/Stock Code



# SET UP AN ALERT

## Add an alert

On the stock code/Index details screen of the Price Board, navigate to “Set up alerts” screen.

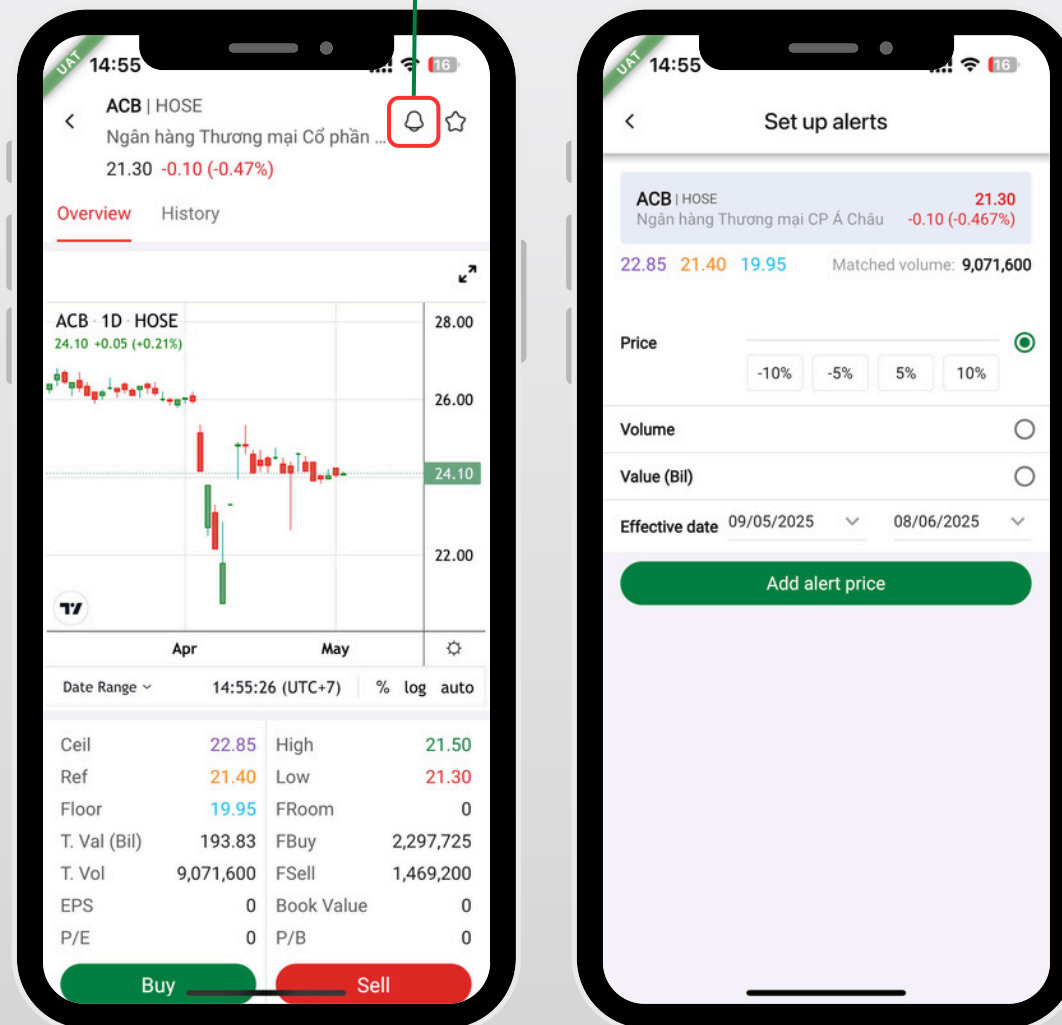
## Set up an alert

Select the alert types and enter the required values to set up an alert.

## Receive alerts

When a stock fluctuation reaches the preset threshold, an alert is triggered and sent as a notification. Investors can view alerts in the Notification interface.

Click to enter “Set up alerts” screen.



# PLACE AN ORDER

## Select action

On the Order screen, select the Buy order/Sell order, Normal order/Conditional and select either End of day (Day order) or Date (Good-Till-Date order)

## Select Order Type

Tap to select the appropriate order type:

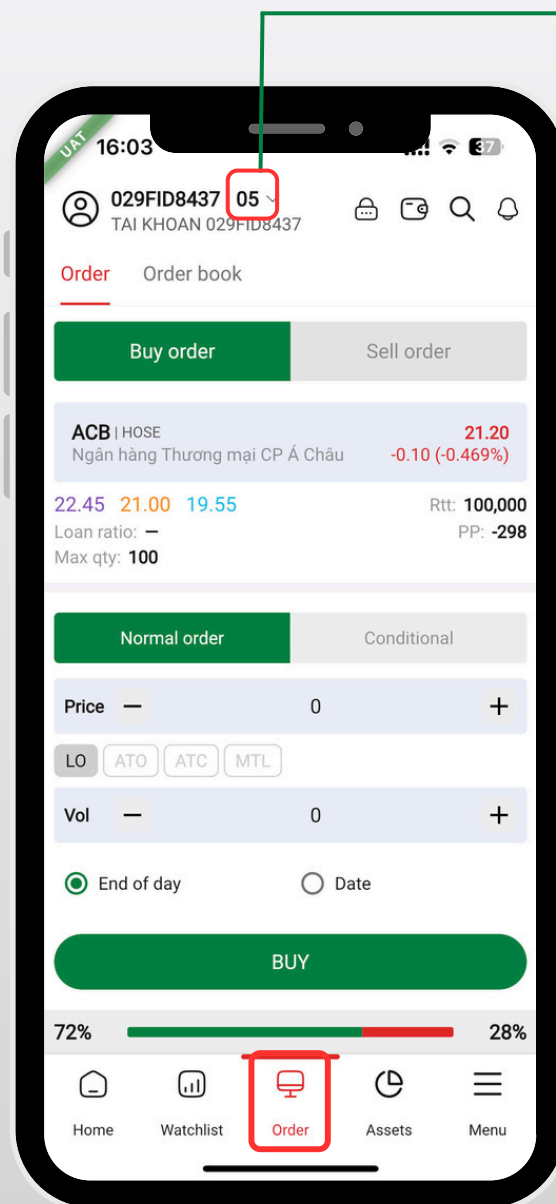
- **Normal order** tab includes: LO, ATO, ATC, MP
- **Conditional** tab includes: STO, TSO, OCO, TP/SL

## Quick Order Entry

Tap on the price and quantity on the screen to quickly place an order.

## Select an trading sub-account

05: Bank-linked sub-account  
(for foreign clients)



## Smart Keyboard

Select the corresponding price and adjust the price step (+/-) based on the exchange, using the smart keyboard.

7	8	9	-1000	+1000
4	5	6	-500	+500
1	2	3	-100	+100
0	00	000	Max qty	✕

# ORDER BOOK

## Track order status

The **Normal** Tab: Consolidates all normal orders

The **Pending/Matched/Canceled** Tabs: Classify normal orders by their status.

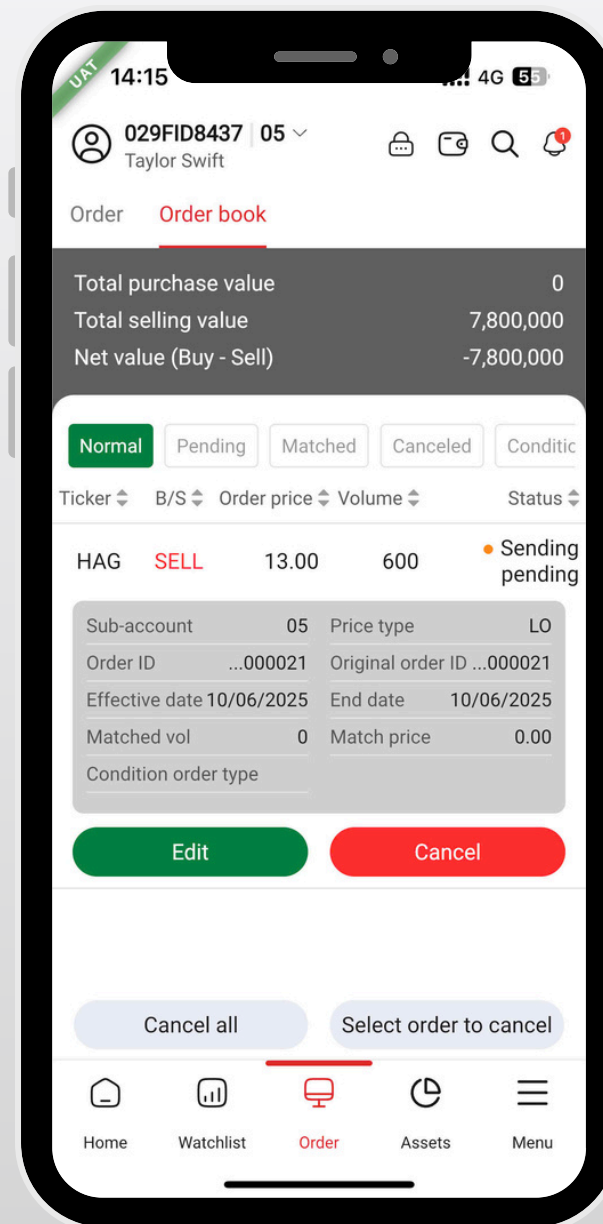
The **Condition** Tab: Consolidate all conditional orders.

## Edit/Cancel order actions

Edit or cancel orders directly on the Order Book screen.

## Quickly cancel all orders

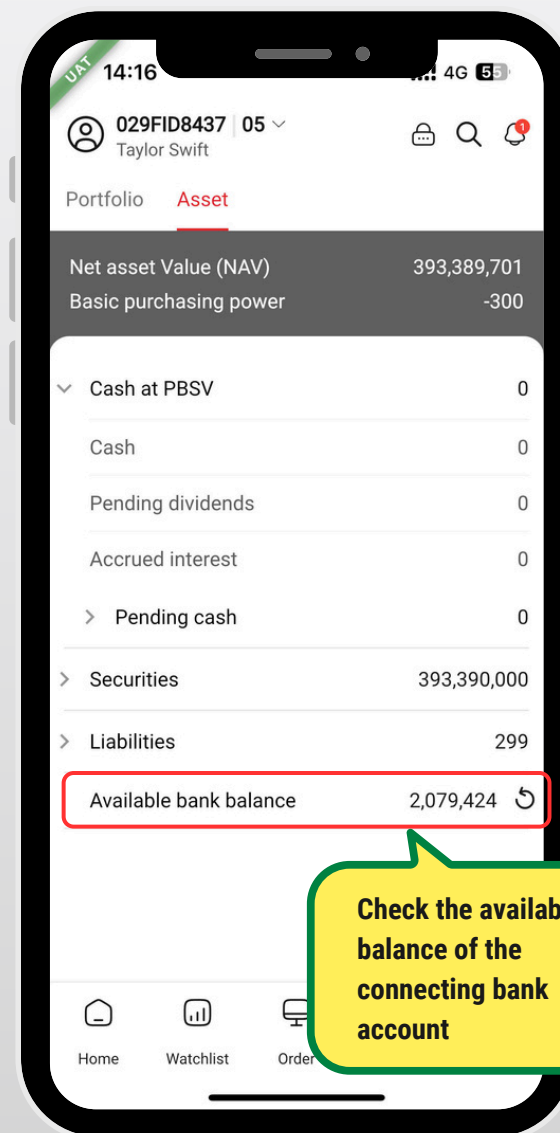
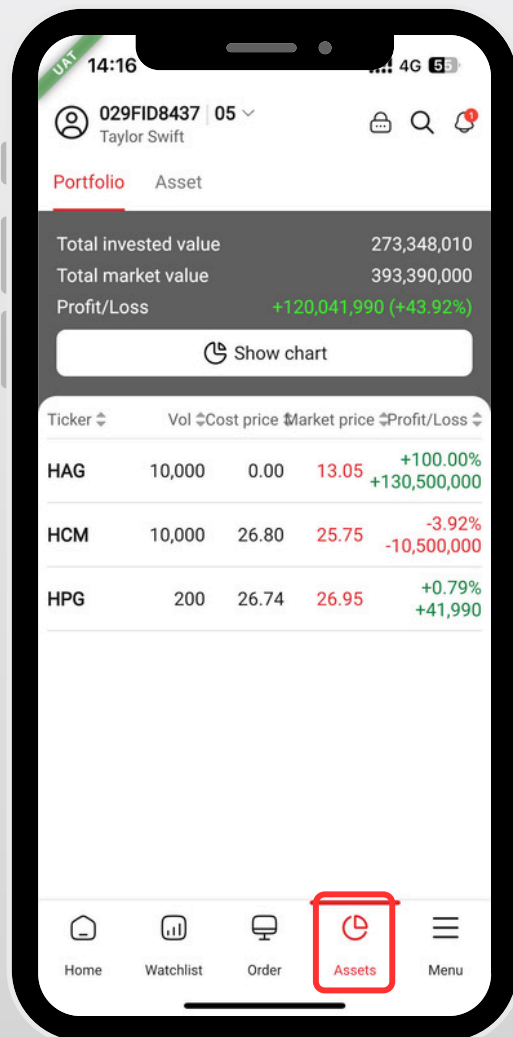
Tap “**Cancel All**” to cancel all unmatched orders, or select specific orders to cancel.



# TRACK YOUR ASSETS AND PORTFOLIO

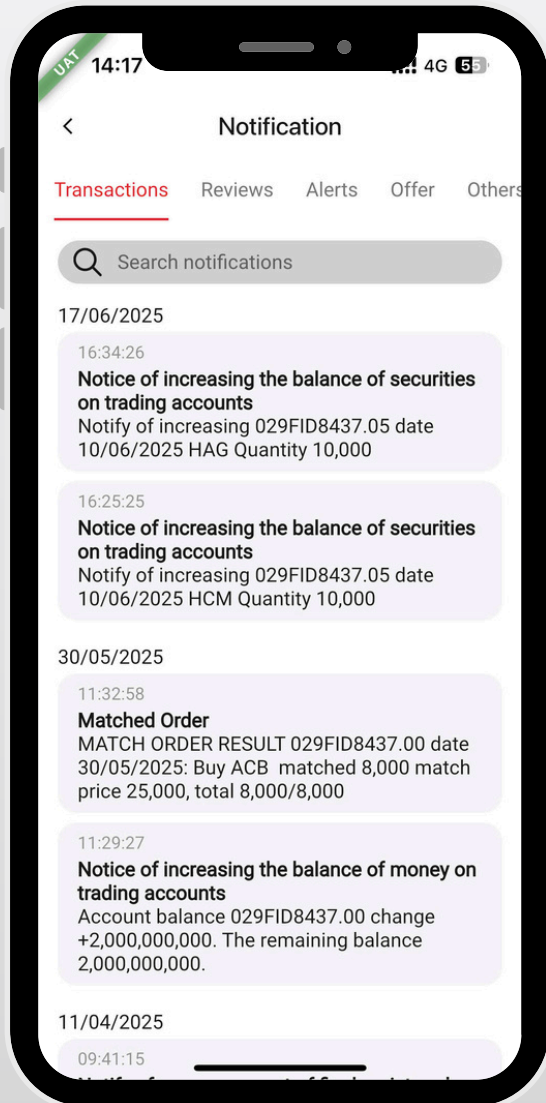
Go to the **Portfolio** tab to view detailed information about your current stock holdings and Profit/Loss.

Go to the **Asset** tab to view detailed information about your asset value, including cash at PBSV, **available balance at the connecting bank**, securities value, purchasing power, margin ratio, and payable amount.



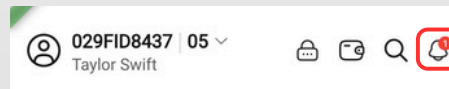


# NOTIFICATION

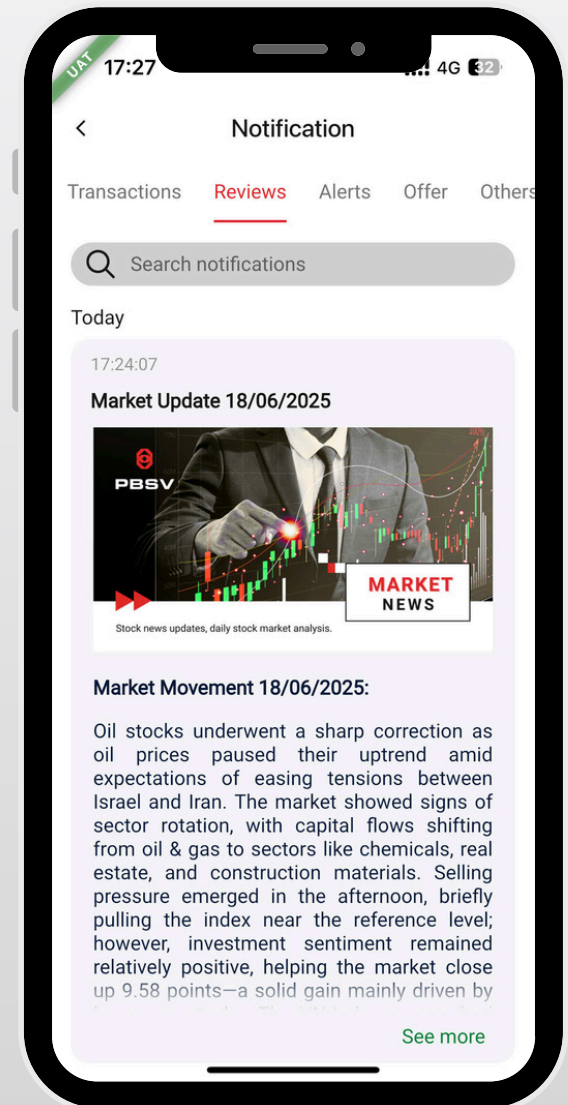


## Access the Notification screen

On the **Order** screen, tap the icon at the top right corner to access the **Notification** screen.



Select the tabs to view information about transactions, corporate actions, market reviews, alerts, offer and others.





# MENU

Click to log out of the account

## Cash transaction

Perform transactions: Internal cash transfer, External cash transfer, Cash advance

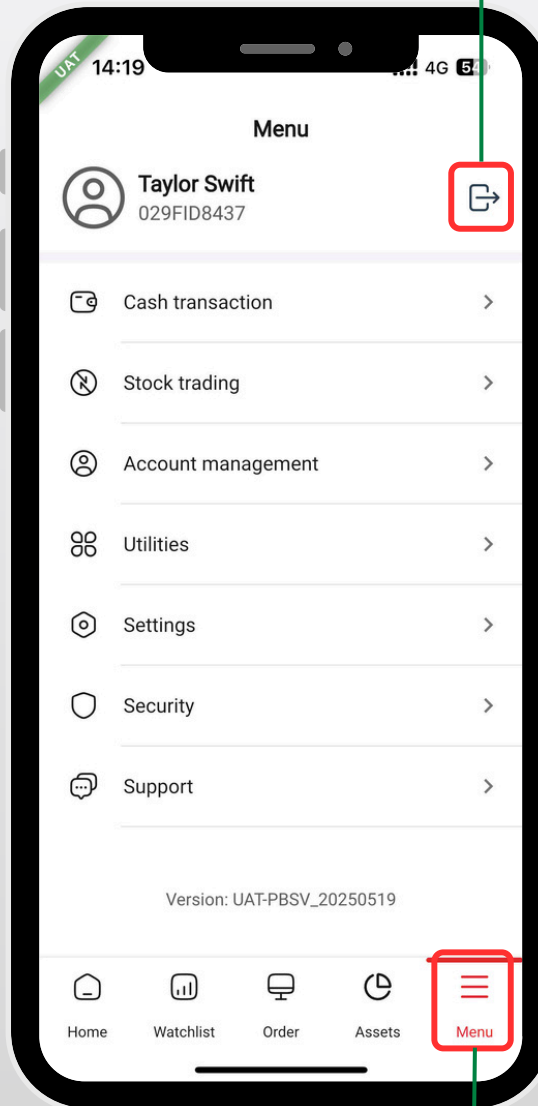
## Stock trading

Perform transactions: Stock transfer, Stock purchase right subscription, Look up exercise of right

## Account management

View account information, including: Margin loans, Cash transaction statement, Stock transaction statement, Place order history, Summary of matched orders, Realized Profit/Loss.

Click to enter the Menu screen



## Utilities

Perform the following actions: Order confirmation, Register for SmartOTP, Check the Marginable stock list, Register open a Margin sub-account, Register for financial products, Register for SMS services, Set up alerts.

## Settings

Set up Personal Information, Citizen identification update, Beneficiary bank, Language, Change font size, Choose theme.

# Download My PBSV at:

IOS



Android

