USER GUIDE FOR I-BOARD APP

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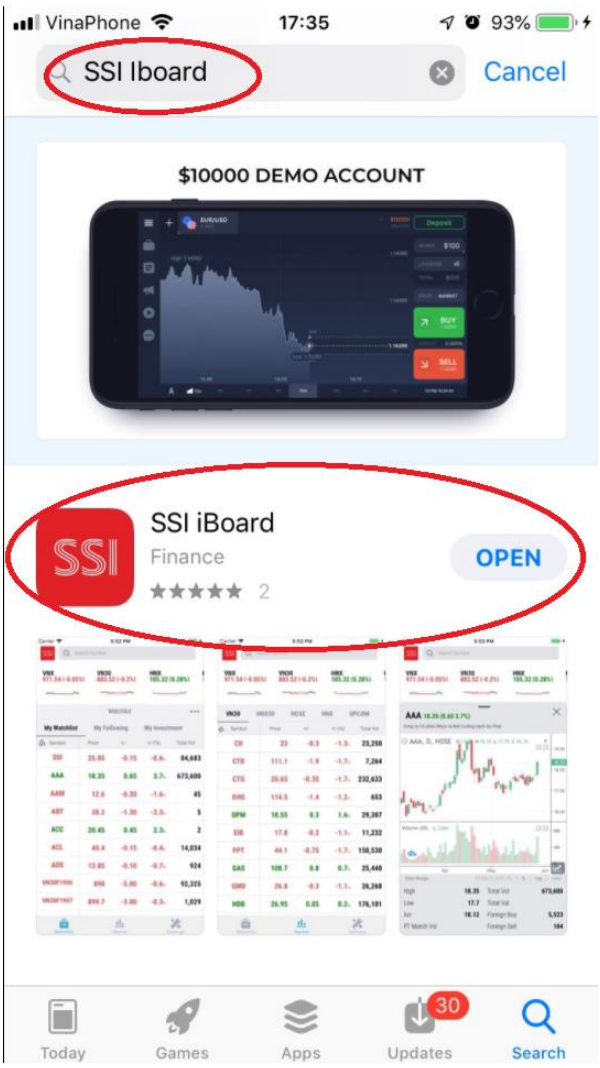
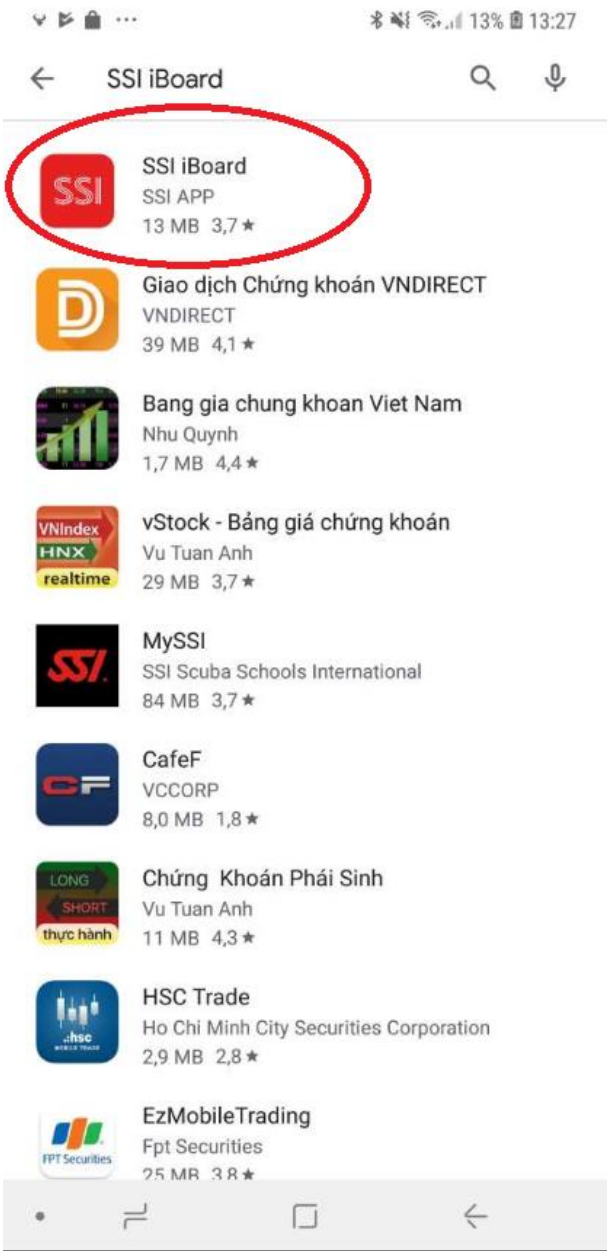
A. TRADING

1. Download I-Board

Open App Store (for iOS) or CH Play (for Android), and search keyword “SSI Iboard” to download I-Board App

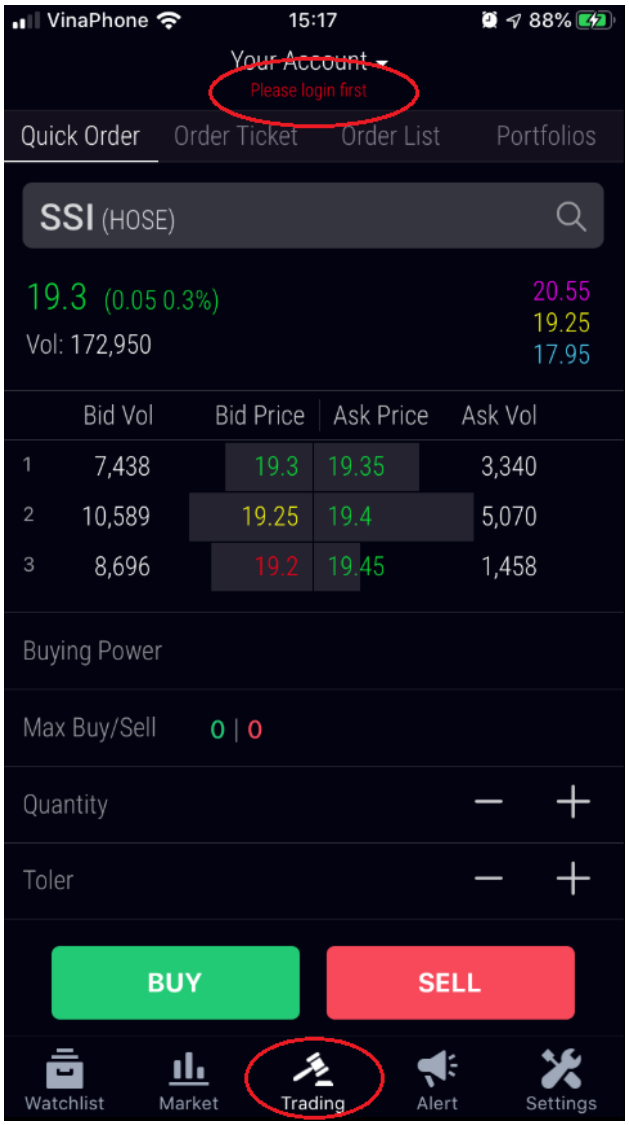
Note: Require iOS 9, Android 7 or later to download the App



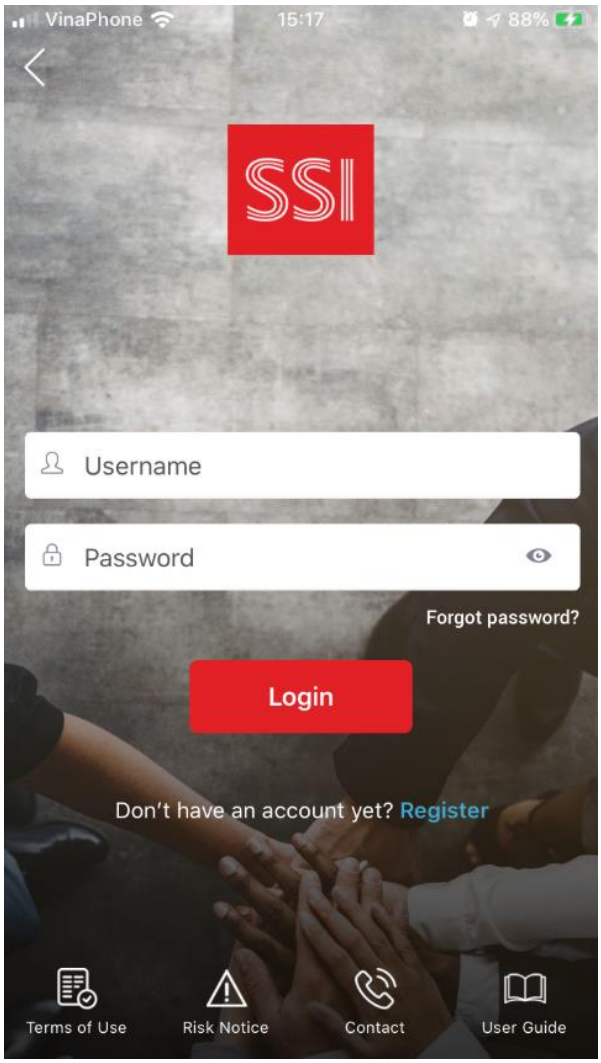


2. Log in

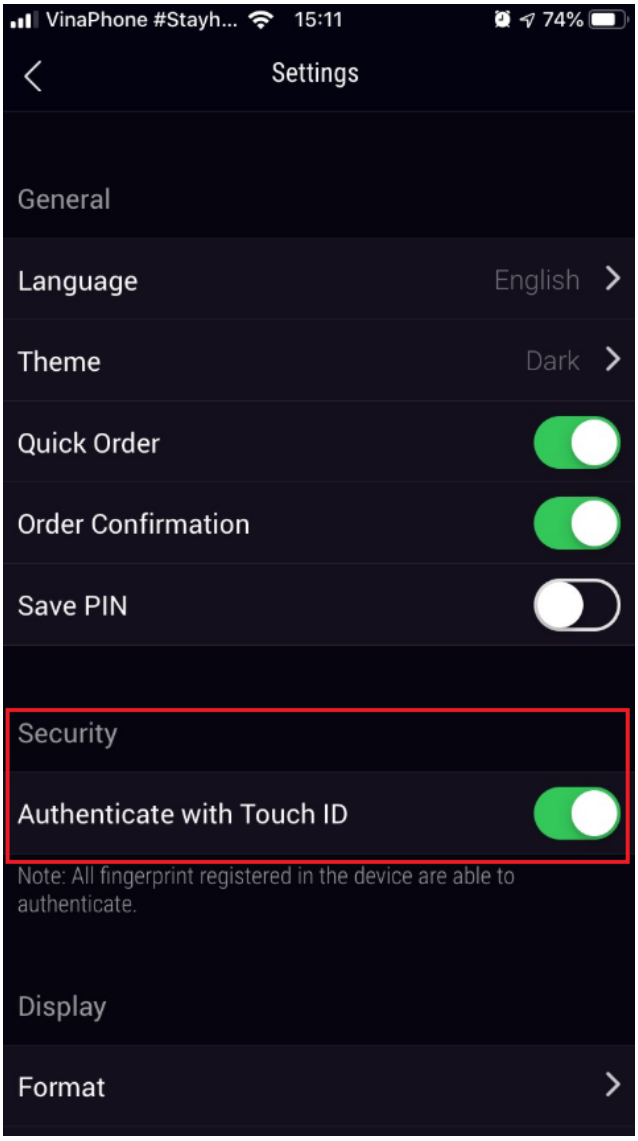
- Step 1: Select Trading, click Please log in first



- Step 2: Enter your Username and password (or use Face ID/Touch ID)



- Step 3: To log in by Face ID/Touch ID, you need to turn on Authentication with Face ID/Touch ID in Setting first



3. Place orders

a. How to place order

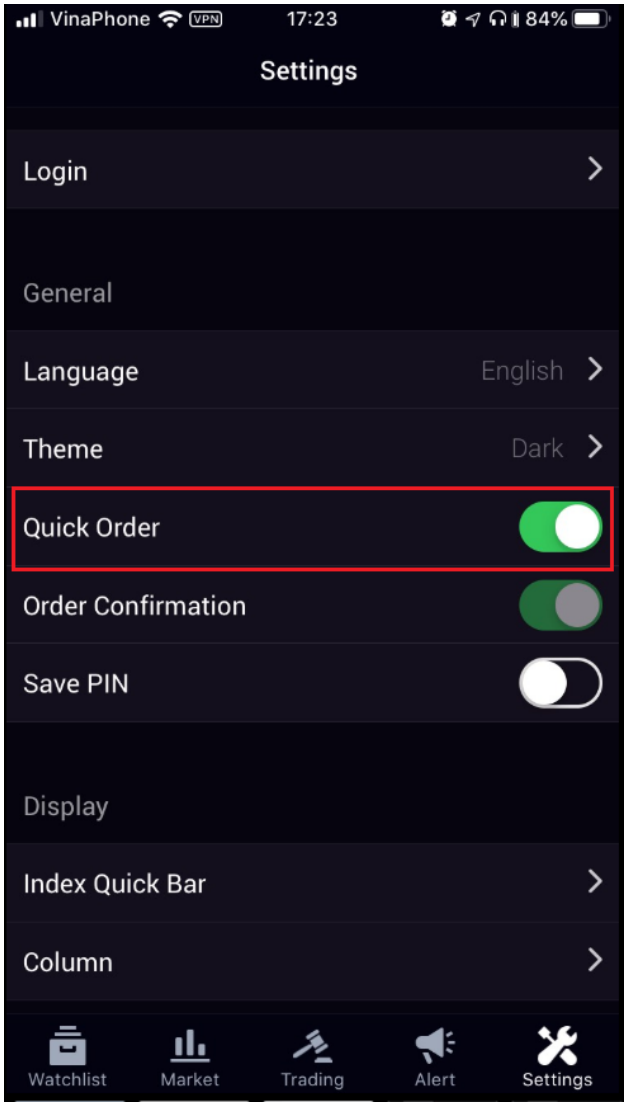
There are 2 ways to place order:

- Option 1: From priceboard/watchlist
  - Step 1: Click on stock symbol on priceboard/watchlist
  - Step 2: Click button Buy/Sell on information screen, the system will switch to the Order screen (Quick order or Order ticket will depend on Quick order mode is on or off)

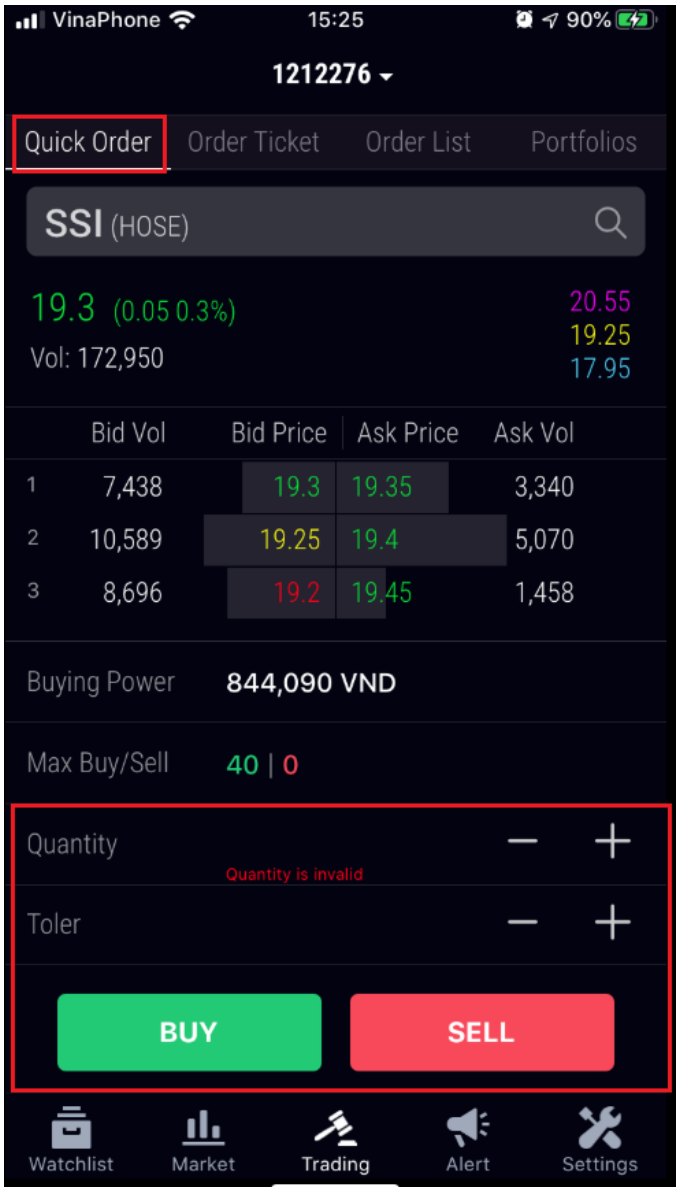
- Option 2: Select Trading > Choose Quick order or Order ticket (depending on your needs)

b. Order mode and detail information on each order ticket

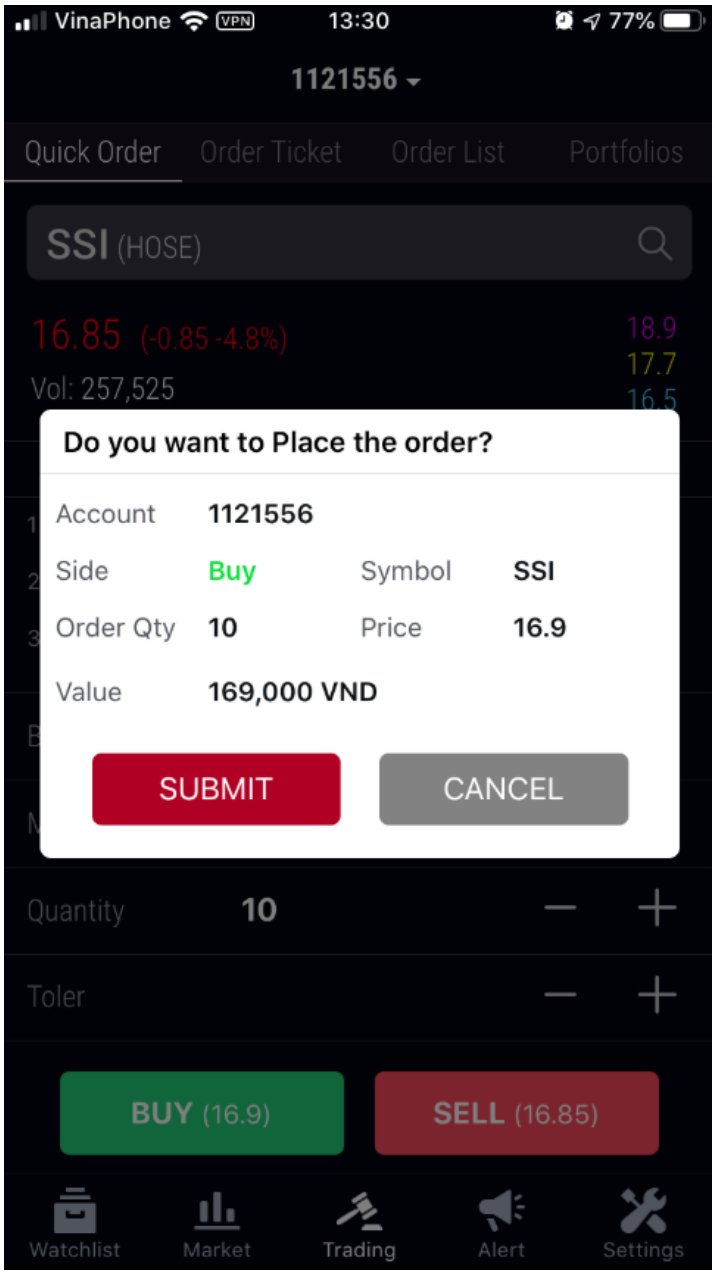
- There are 2 order modes: Quick order and Order ticket. You can choose order mode you want to user in Settings

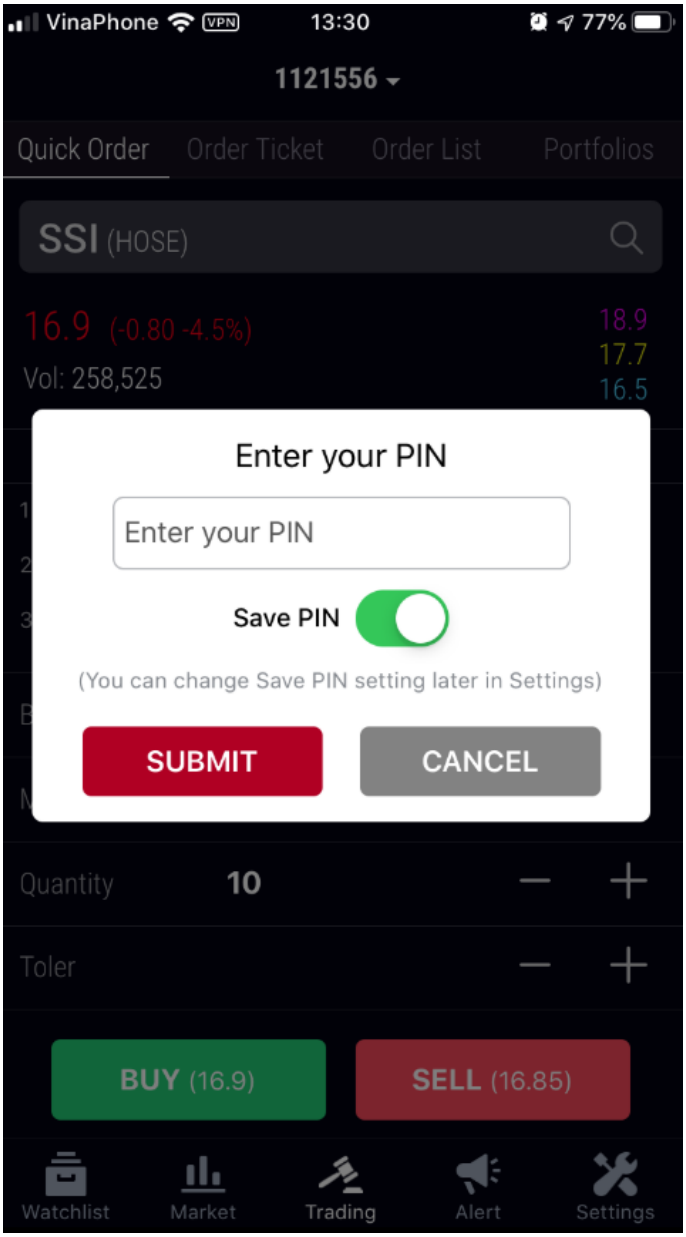


- Quick order:
  - Quick order helps you to buy and sell stock with current best bid/ask price on the market
  - Step 1: Select Account number, Stock symbol. Stock symbol will be automatically filled if you place order from watchlist/priceboard
  - Step 2: Enter Quantity, Toler (if needed). Price will be shown in Buy/Sell button. Toler helps you to increase the successful matching opportunities
    - Price = Best ask + Toler (if it is Buy order)
    - Price = Best bid – Toler (if it is Sell order)
  - Step 3: Click Buy/Sell button

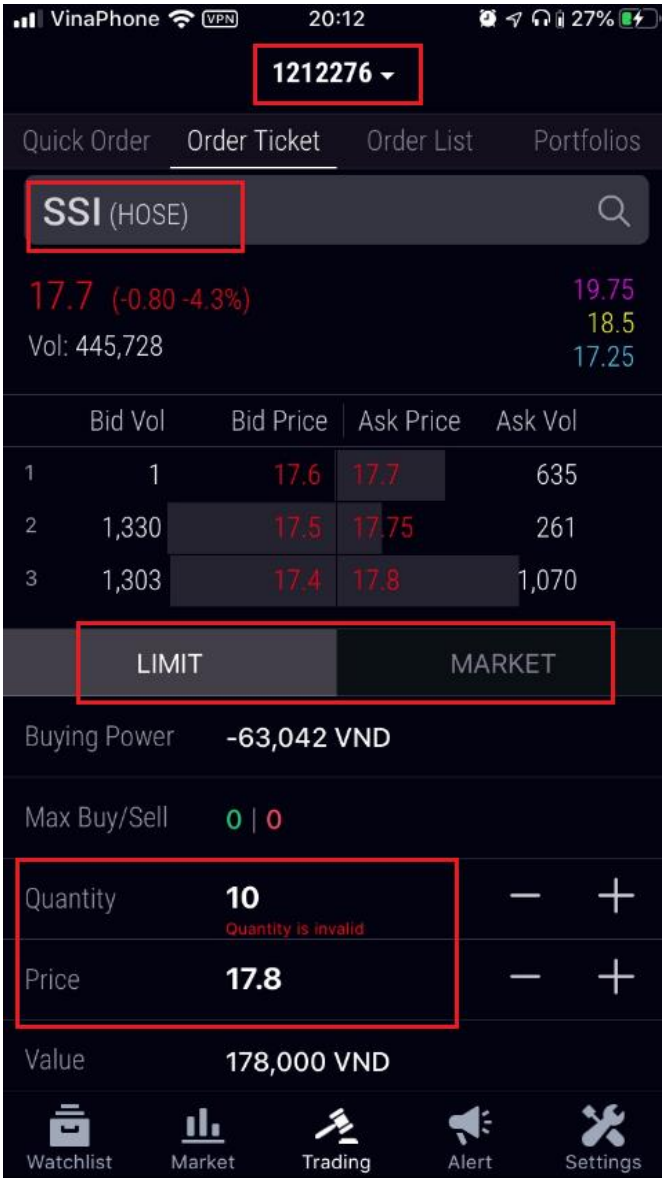


- Step 4: Click confirm and enter PIN code (if you haven't chosen to save PIN code before) to send order

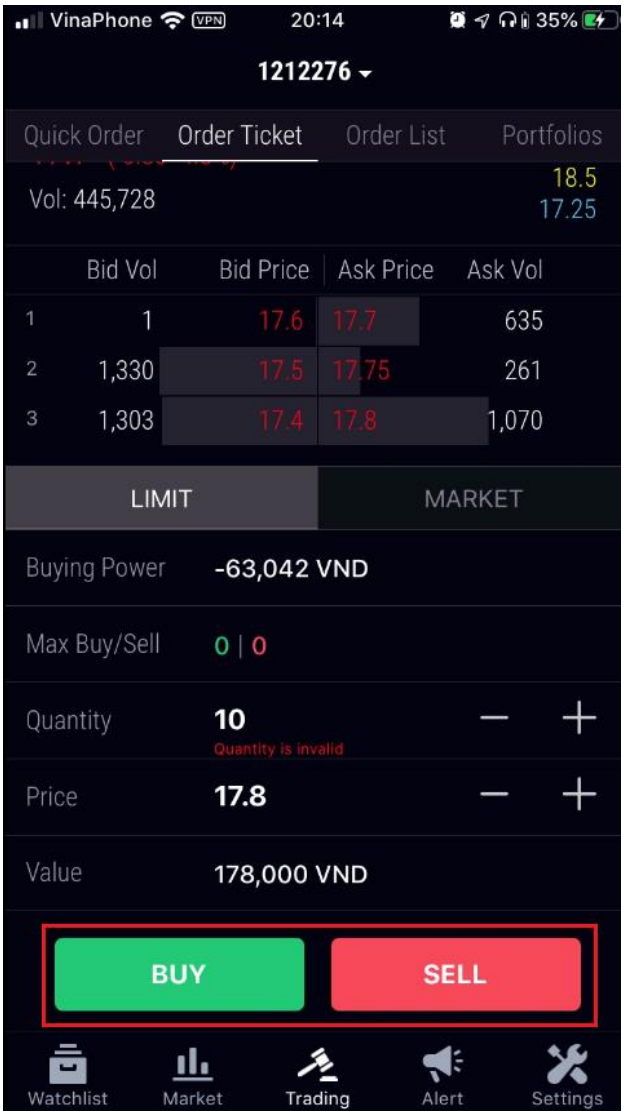

VinaPhone
VPN
13:30
77%
1121556
Quick Order
Order Ticket
Order List
Portfolios
SSI (HOSE)
16.85 (-0.85 -4.8%)
Vol: 257,525
18.9
17.7
16.5
Do you want to Place the order?
Account 1121556
Side Buy
Symbol SSI
Order Qty 10
Price 16.9
Value 169,000 VND
SUBMIT
CANCEL
Quantity 10
Toler
BUY (16.9)
SELL (16.85)
Watchlist
Market
Trading
Alert
Settings



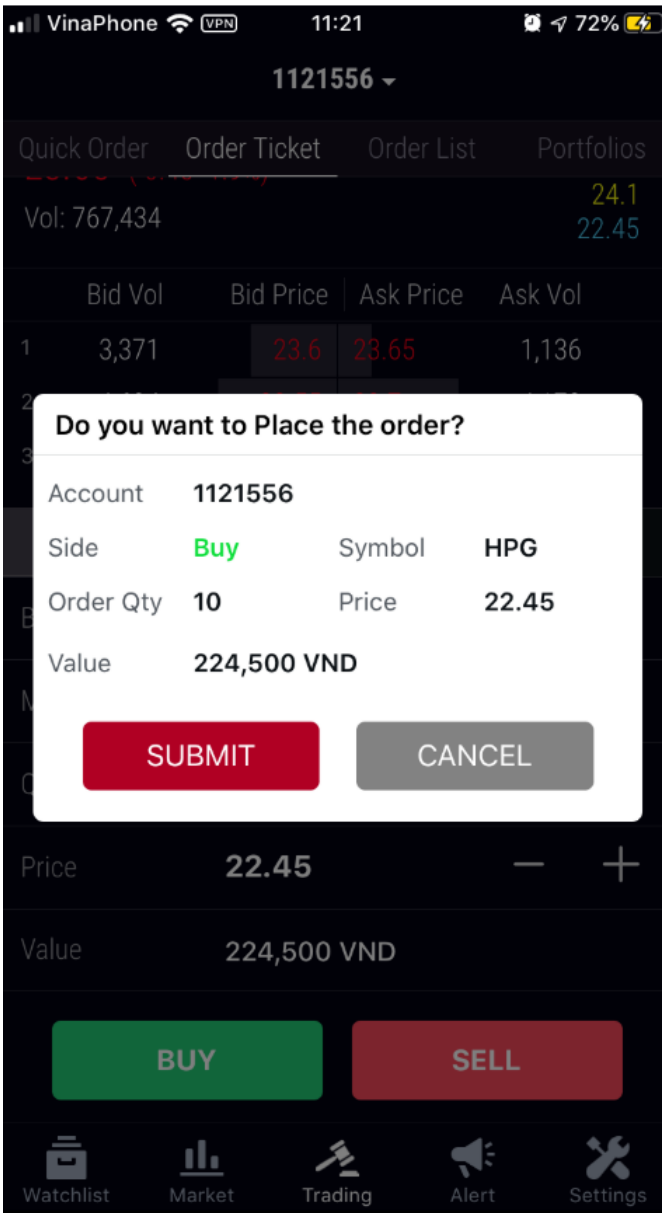
- Order ticket
  - Order ticket helps you to buy and sell stock with specific price or place market order (ATO< ATC, MP, MOK, MAK, MTL, PLO)
  - Step 1: Select Account number, Stock symbol. Stock symbol will be automatically filled if you place order from watchlist/price board
  - Step 2: Click Limit or Market, depending on your needs
  - Step 3: Enter Quantity, Price (if you choose Limit order)

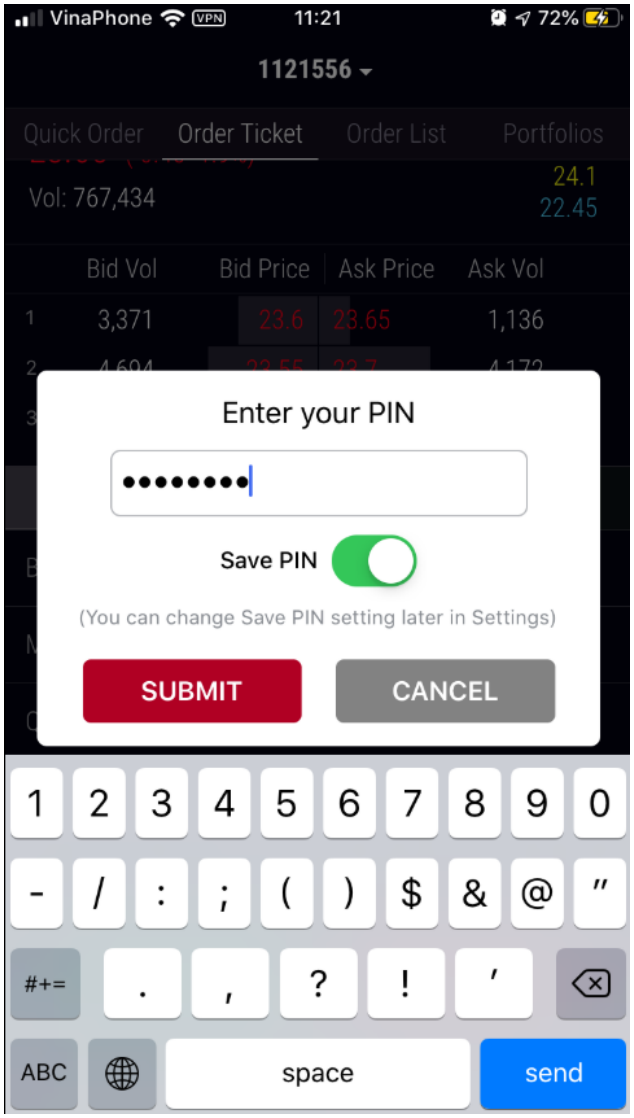


- Step 4: Click Buy/Sell button



- Step 5: Click confirm and enter PIN code (if you haven't chosen to save PIN code before) to send order


VinaPhone
VPN
11:21
72%
1121556
Quick Order
Order Ticket
Order List
Portfolios
Vol: 767,434
24.1
22.45
Bid Vol
Bid Price
Ask Price
Ask Vol
1
3,371
23.6
23.65
1,136
Do you want to Place the order?
Account
1121556
Side
Buy
Symbol
HPG
Order Qty
10
Price
22.45
Value
224,500 VND
SUBMIT
CANCEL
Price
22.45
Value
224,500 VND
BUY
SELL
Watchlist
Market
Trading
Alert
Settings

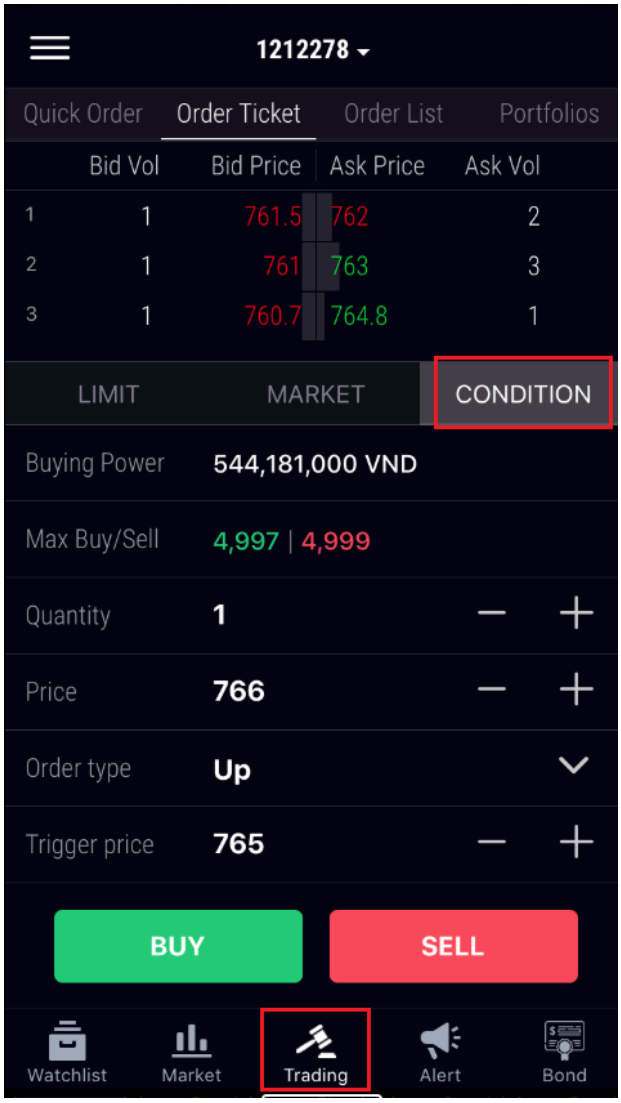


c. Place conditional orders for derivative

- Step 1: Open order ticket to place conditional order

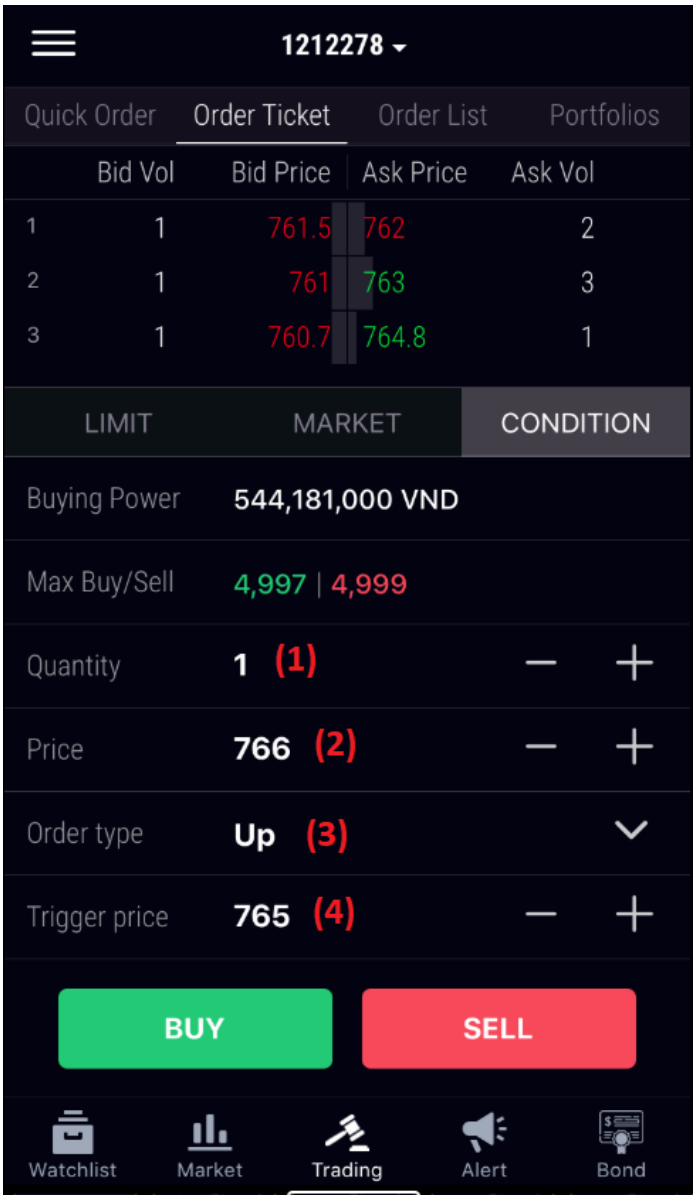
You can click on tab Trading > Condition

Note: Conditional orders is only available for derivative symbols



- Step 2: Fill Quantity, Price, choose conditional type, and fill in the fields corresponding to each type of conditional order
  - **Up/Down orders**
    - Up/Down order is the conditional order in which the order price and trigger price are predefined. When the market price touches or increases above (for Up order)/ decrease below (for Down order) the trigger price, the order will be activated and sent to the floor with the order price set up by customers.
    - Fields need to be filled in:
      (1) Quantity
      (2) Price: order will be sent to the market with this price
      (3) Conditional type: Up/Down
      (4) Trigger price: your order will be activated and sent to the market when the market price touches trigger price

      Note:
      ✓ Trigger price > Market price (for Up order)
      ✓ Trigger price < Market price (for Down order)

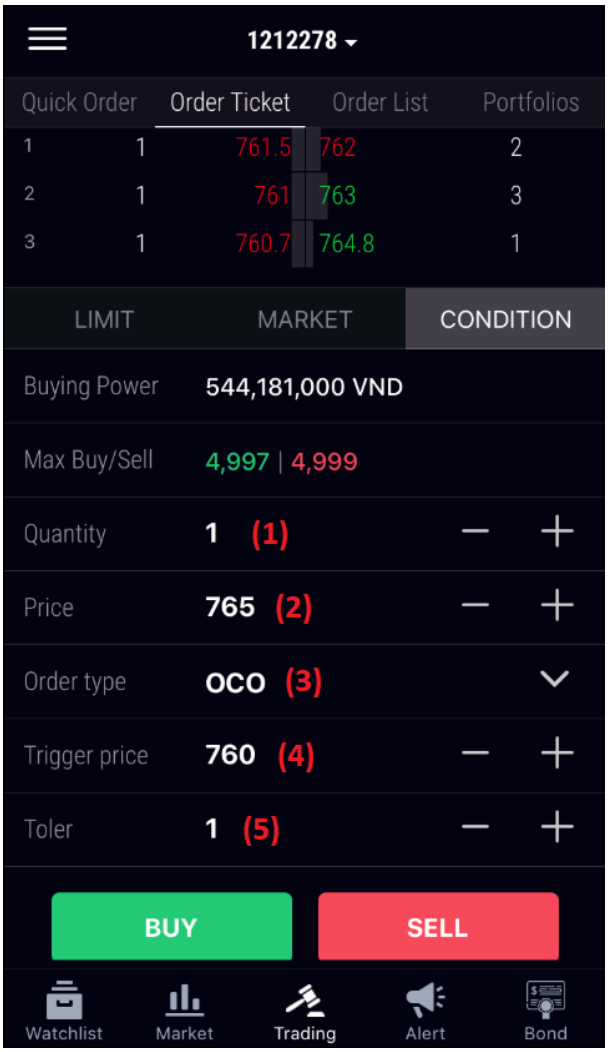


- **OCO order**
  - OCO is an order to close position with expected target price (take profit), combined with a cut loss order, which help investors to take profit automatically or the order will act as an automatic cut loss one at a predetermined price if the market price fluctuates in the opposite direction.
  - OCO order includes information as:
    - ✓ Order price: is the expected profit price to close position.
    - ✓ Trigger price: is the cut loss price customer has been predetermined. If market price touches trigger price, your order will be modified to cut loss price
    - ✓ Toler: is the increasing/decreasing range based on the setting trigger price, to adjust the order price to cut loss, which help to increase the successful matching opportunities.
    - ✓ Cut loss price: is the stop loss price which has been adjusted following the toler value.

If OCO is a buy order: Cut loss price = Trigger price + Toler, Cut loss price is activated when Market Price >= Trigger Price.

If OCO is a sell order: Cut loss price = Trigger price - Toler, Cut loss price is activated when Market Price <= Trigger Price.

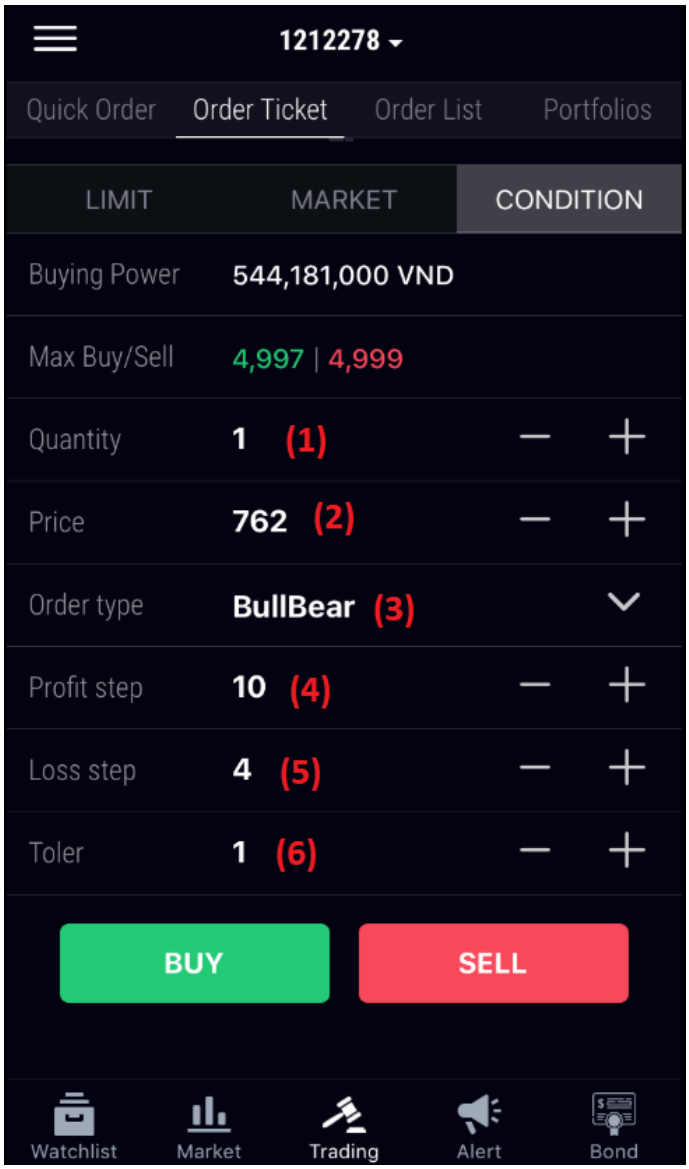
- Fields need to be filled in:
  (1) Quantity
  (2) Price: is the expected profit price to close position
  (3) Conditional type: OCO
  (4) Trigger price: if market price touches trigger price, your order will be modified to cut loss price
  (5) Toler



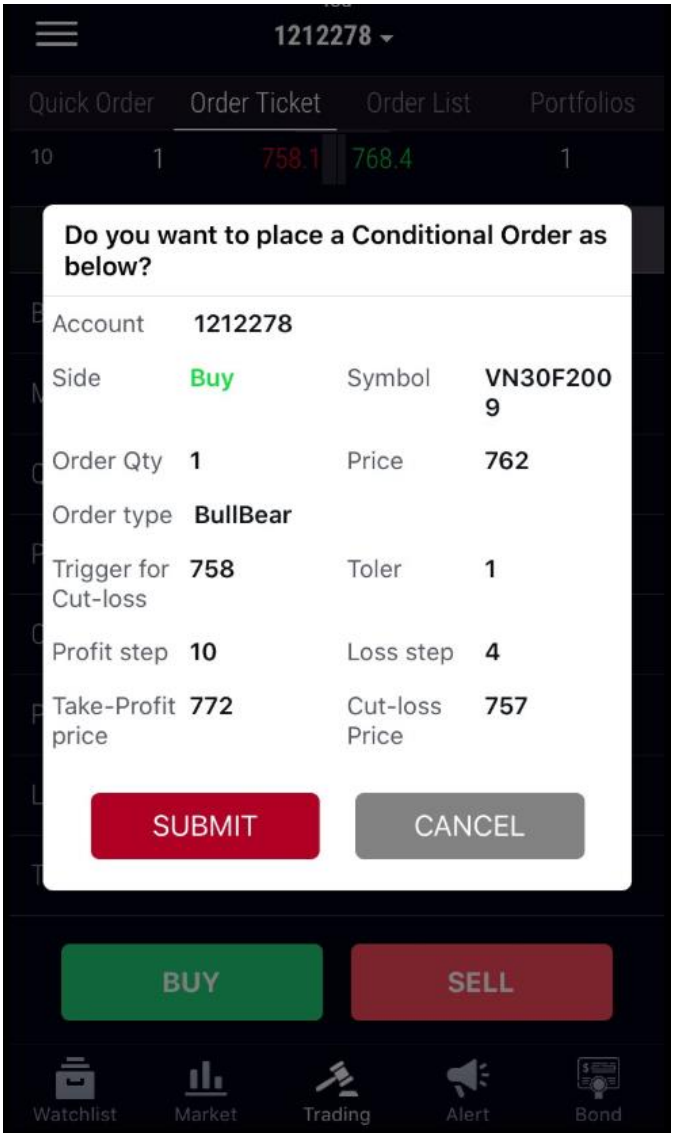
- **BullBear order**
  - Bull & Bear is the conditional order to open new positions, combined with 2 orders to close position: One is to lock in gains and the other is to limit losses. Accordingly, Bull & Bear is considered as a combination of 3 orders:
    (1) A limit order to Buy/Sell (original order) to open new position

(2) A limit order to close position at the expected profit price
(3) A limit order to cut loss in case the market price fluctuates with bad direction

- When Bull & Bear order (known as the original order (1)) is fully matched, an OCO order (combination of (2) and (3)) to take profit or cut loss will be automatically generated.
- Fields need to be filled in:
  (1) Quantity
  (2) Price: is the price to open new position
  (3) Conditional type: Bull Bear
  (4) Profit step: distinct value between order price and expected profit price of customers.
  (5) Loss step: distinct value between order price and cut loss price which has been predetermined by customer within a range of risk.
  (6) Toler: is the increasing/decreasing range based on the setting loss price, to adjust the order price to cut loss, which help to increase the successful matching opportunities.

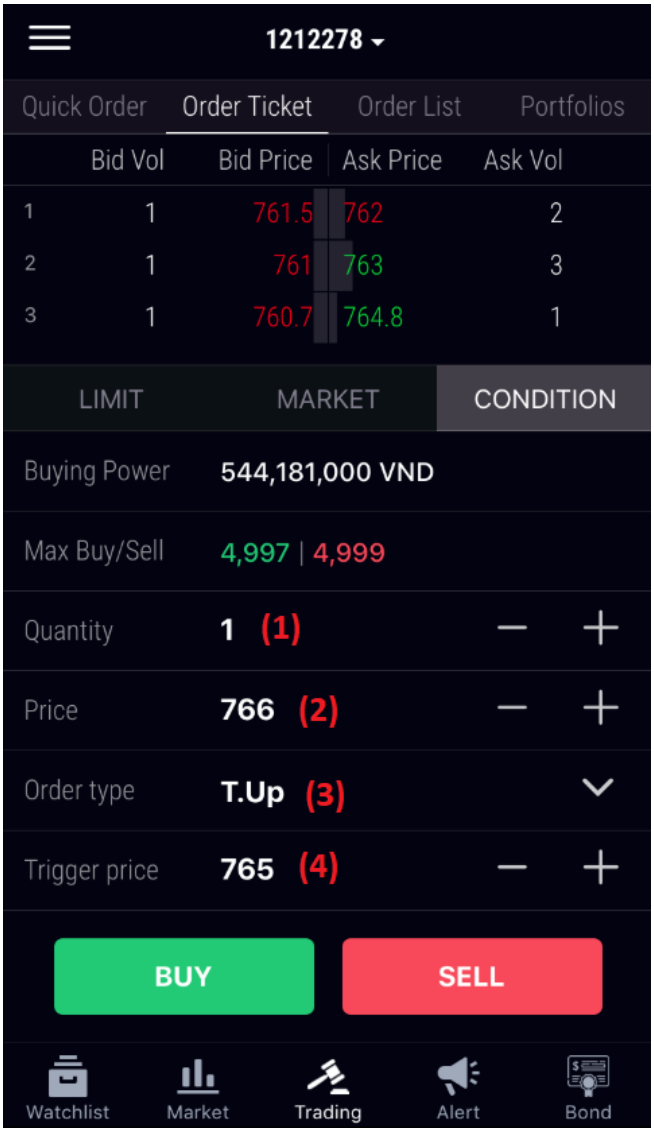


- The system will calculate automatically take profit price and cut loss price



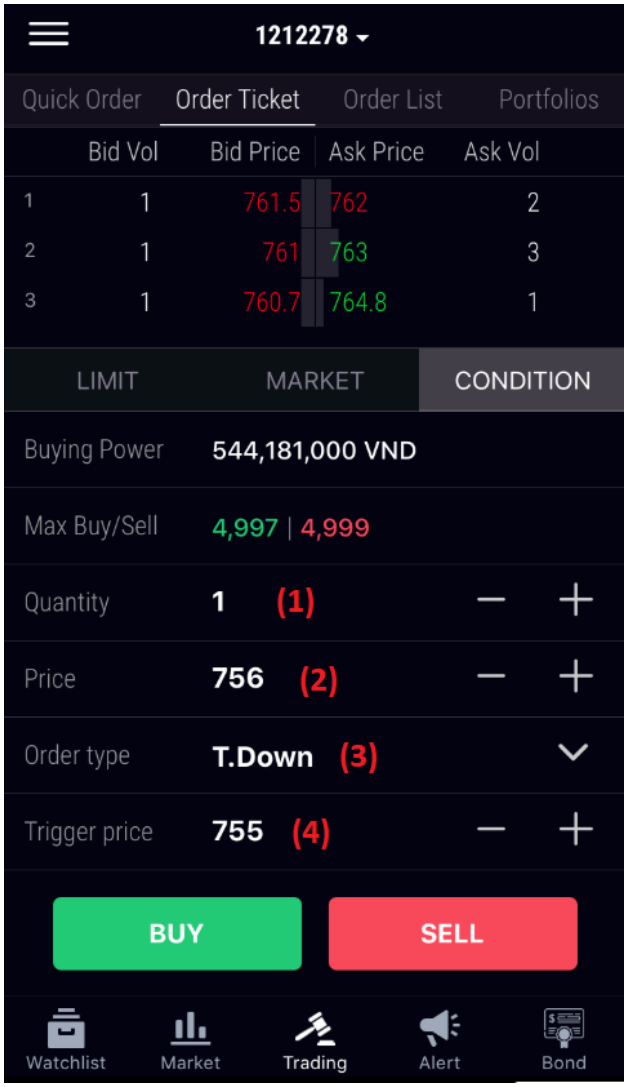
- **T.Up order**
  - Trailing up order is a BUY order with the buying price automatically adjusted downward according to changes in the market trend to get the good price. When the market price moves downward and creates a new bottom point since placing the order, trigger price will be adjusted by a predefined spread value (distinct value between the current market price and the market price when placing order). When the market price increases, trigger price and order price will remain unchanged. The market price fluctuates until the adjusted trigger price and the market price are concurrent, order will be sent to the floor with the order price being calculated by the initial order price + (the last trigger price – the initial trigger price).
  - Order regulation: Order price and trigger price > market price
  - Fields need to be filled in:
    (1) Quantity

(2) Price
(3) Conditional type: T.Up
(4) Trigger price



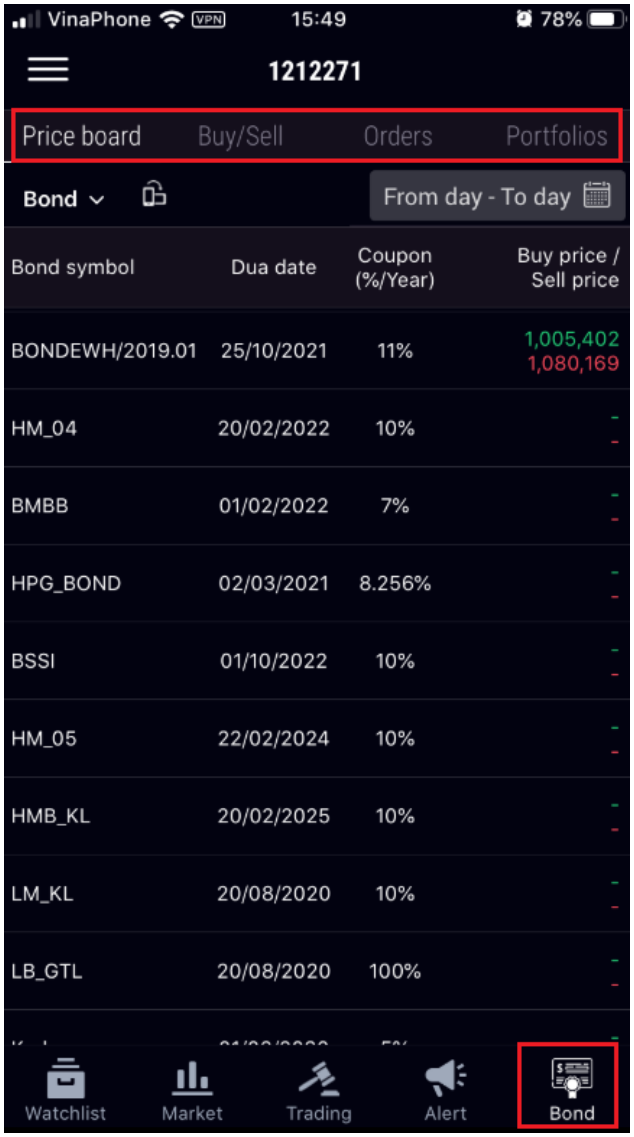
- **T.Down order**
  - Trailing down order is a SELL order with the buying price automatically adjusted upward according to changes in the market trend to get the good price. When the market price moves upward and creates a new top point since placing the order, trigger price will be adjusted by a predefined spread value (distinct value between the current market price and the market price when placing order). When the market price decreases, trigger price and order price will remain unchanged. The market price fluctuates until the adjusted trigger price and the market price are concurrent, order will be sent to the floor with the order price being calculated by the initial order price + (the last trigger price – the initial trigger price).
  - Order regulation: Order price and trigger price < market price
  - Fields need to be filled in:

(1) Quantity
(2) Price
(3) Conditional type: T.Down
(4) Trigger price

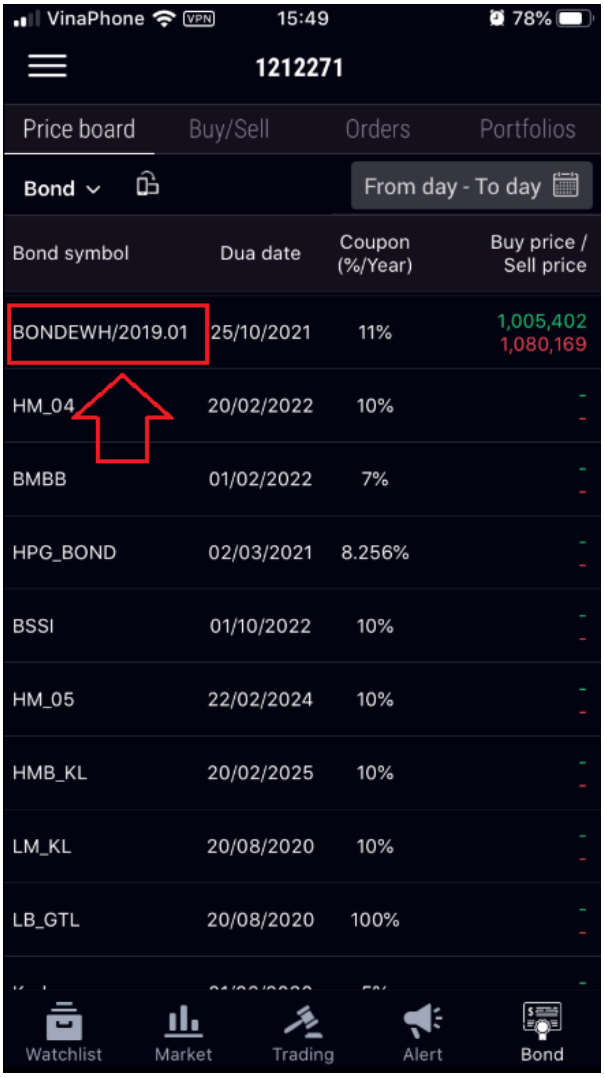


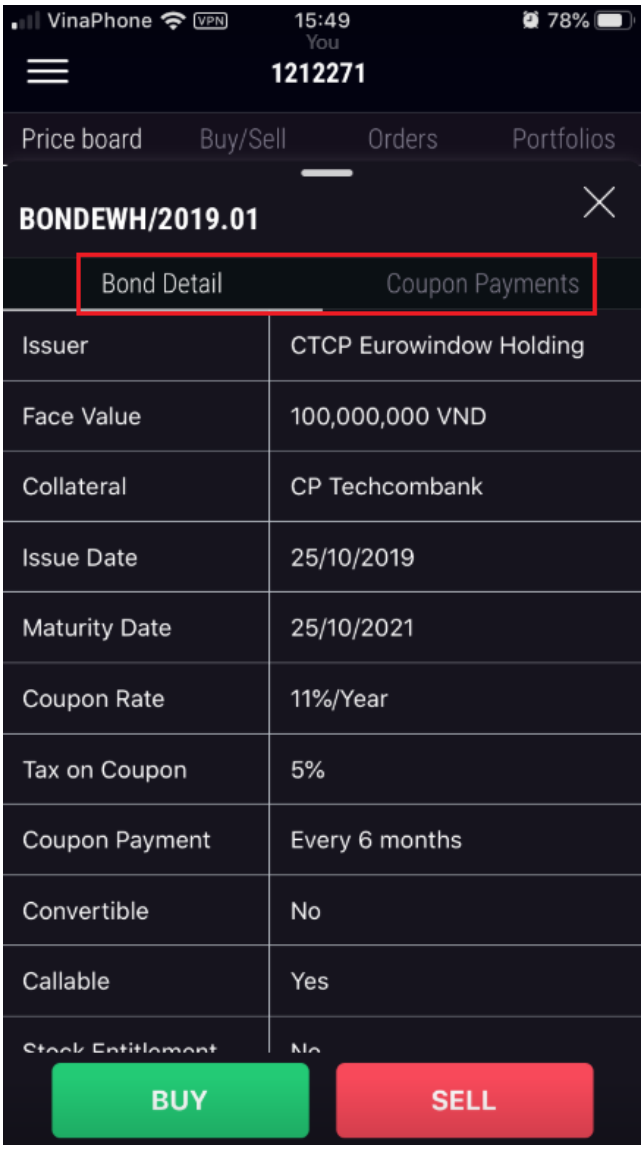
d. Place SBond order

- In order to place SBond order, you can click on menu Bond. There are 4 tabs:
  - Priceboard: You use priceboard to check bond information (for ex: par value, coupon, expiry date,…), Buy/Sell price and Buy/Sell limit everyday
  - Buy/Sell: is order ticket
  - Order book: this order book is only for SBond
  - Portfolio: this portfolio is only for checking SBond portfolio

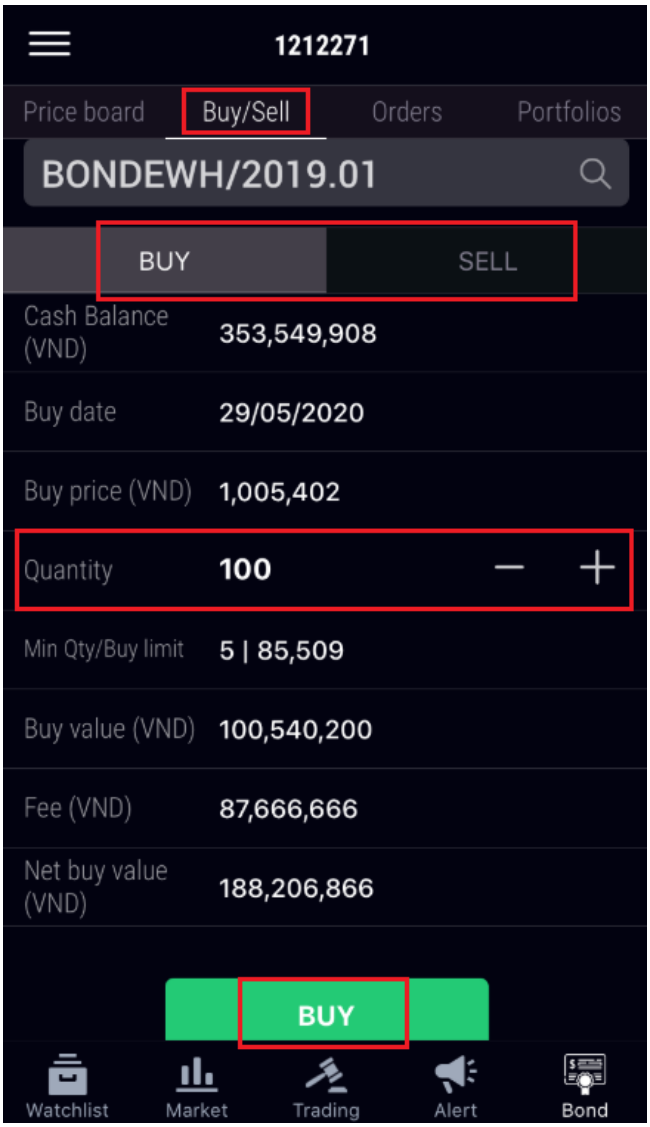


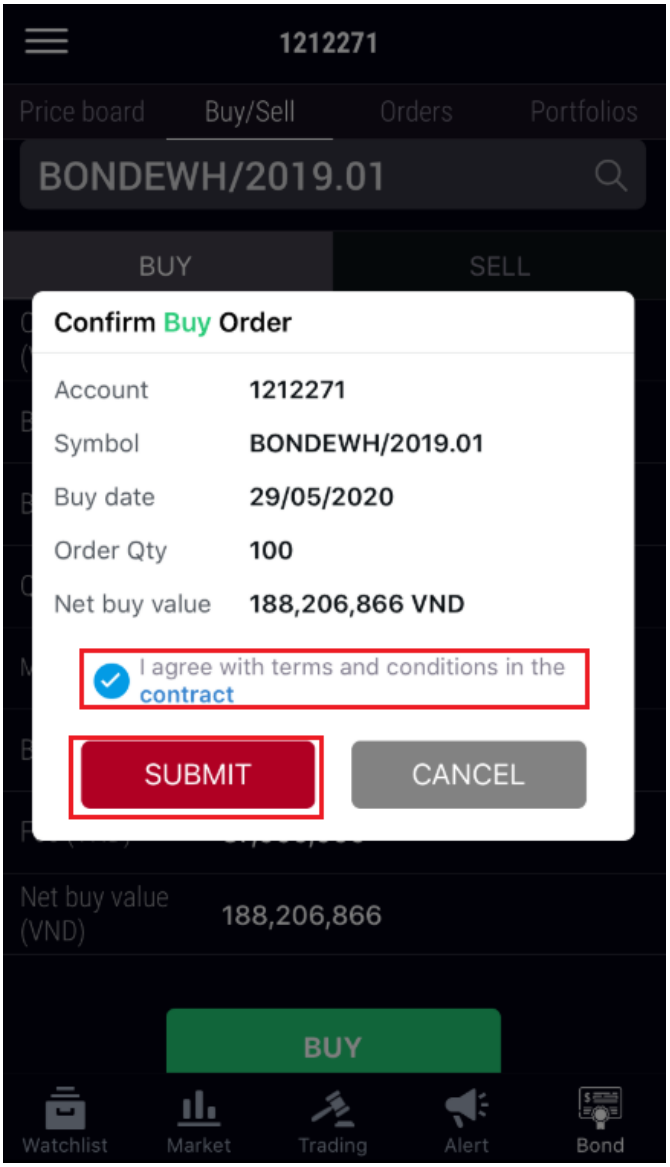
- In order to view detailed information of bond, you can click on bond symbol

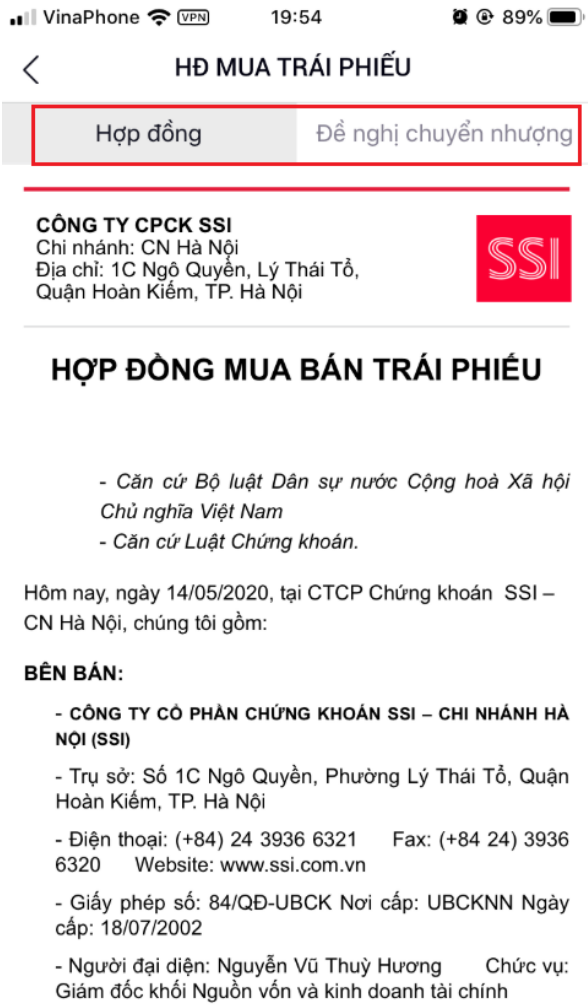

VinaPhone
15:49
78%
1212271
Price board
Buy/Sell
Orders
Portfolios
Bond
From day - To day
Bond symbol
Dua date
Coupon (%/Year)
Buy price / Sell price
BONDEWH/2019.01
25/10/2021
11%
1,005,402
1,080,169
HM_04
20/02/2022
10%
BMBB
01/02/2022
7%
HPG_BOND
02/03/2021
8.256%
BSSI
01/10/2022
10%
HM_05
22/02/2024
10%
HMB_KL
20/02/2025
10%
LM_KL
20/08/2020
10%
LB_GTL
20/08/2020
100%
Watchlist
Market
Trading
Alert
Bond



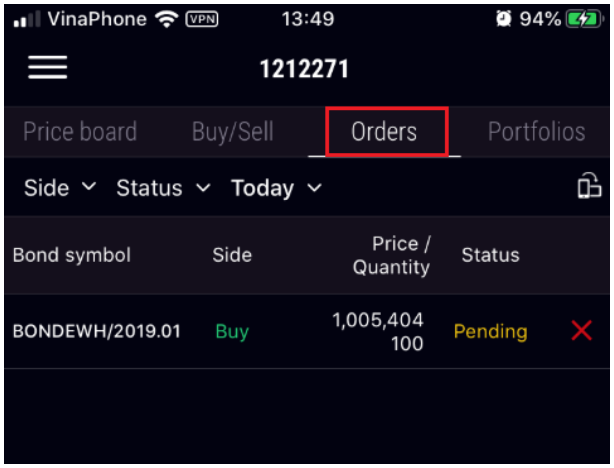
- In order to place SBond orders, you can click on Buy/Sell > Enter bond symbol > Fill in Quantity > Click Buy or Sell > Click confirm read the contract > Submit. And if you need to view full contract, you can click contract on confirmation screen


1212271
Price board
Buy/Sell
Orders
Portfolios
BONDEWH/2019.01
BUY
SELL
Cash Balance (VND)
353,549,908
Buy date
29/05/2020
Buy price (VND)
1,005,402
Quantity
100
Min Qty/Buy limit
5 | 85,509
Buy value (VND)
100,540,200
Fee (VND)
87,666,666
Net buy value (VND)
188,206,866
BUY
Watchlist
Market
Trading
Alert
Bond


1212271
Price board
Buy/Sell
Orders
Portfolios
BONDEWH/2019.01
BUY
SELL
Confirm Buy Order
Account
1212271
Symbol
BONDEWH/2019.01
Buy date
29/05/2020
Order Qty
100
Net buy value
188,206,866 VND
I agree with terms and conditions in the contract
SUBMIT
CANCEL
Net buy value (VND)
188,206,866
BUY
Watchlist
Market
Trading
Alert
Bond

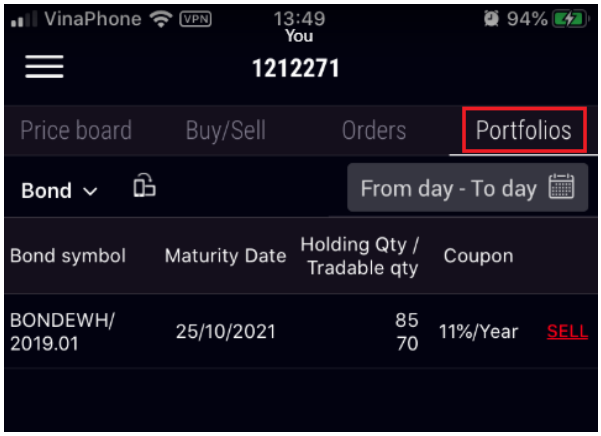


- After placing order, you can check order status on order book.



- You can check your order history by clicking on button Today > Choose a period of time to check.
- In order to cancel order, you can click on button ✕ on that order. Note: You only can cancel Pending order

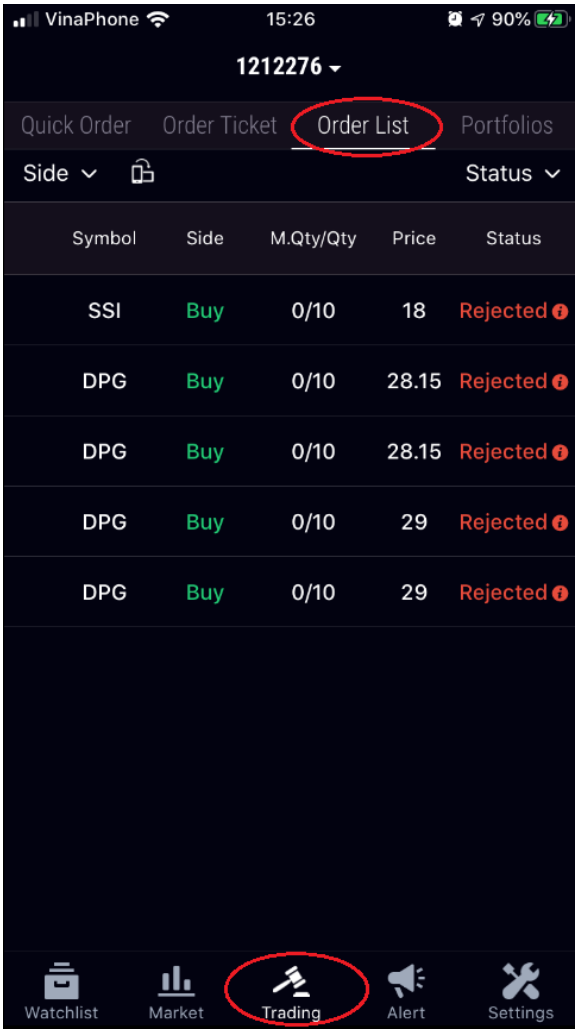
- After your order is completed, you can check SBond portfolio. To check more detailed information, click on button to switch to landscape mode.



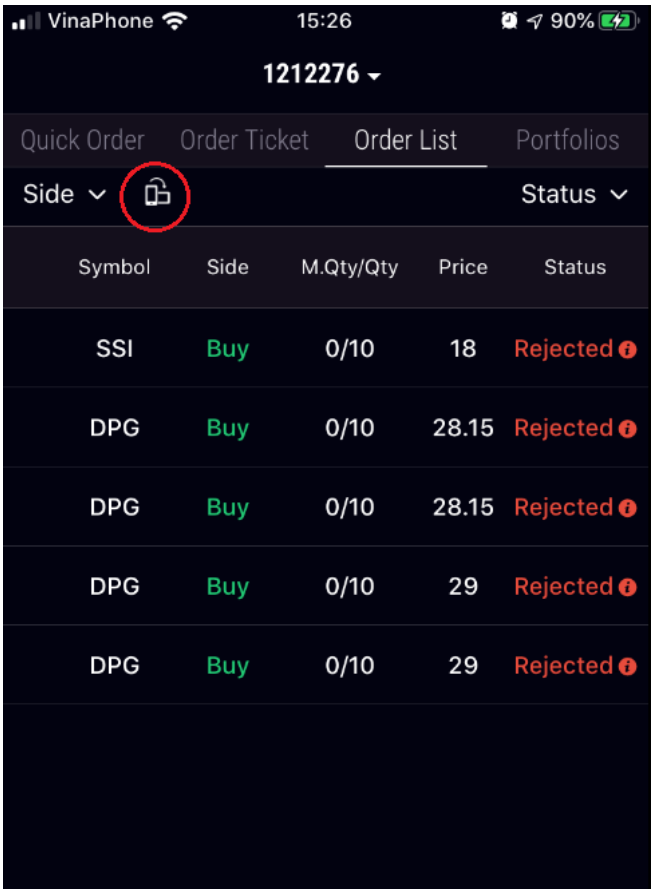
4. Order book

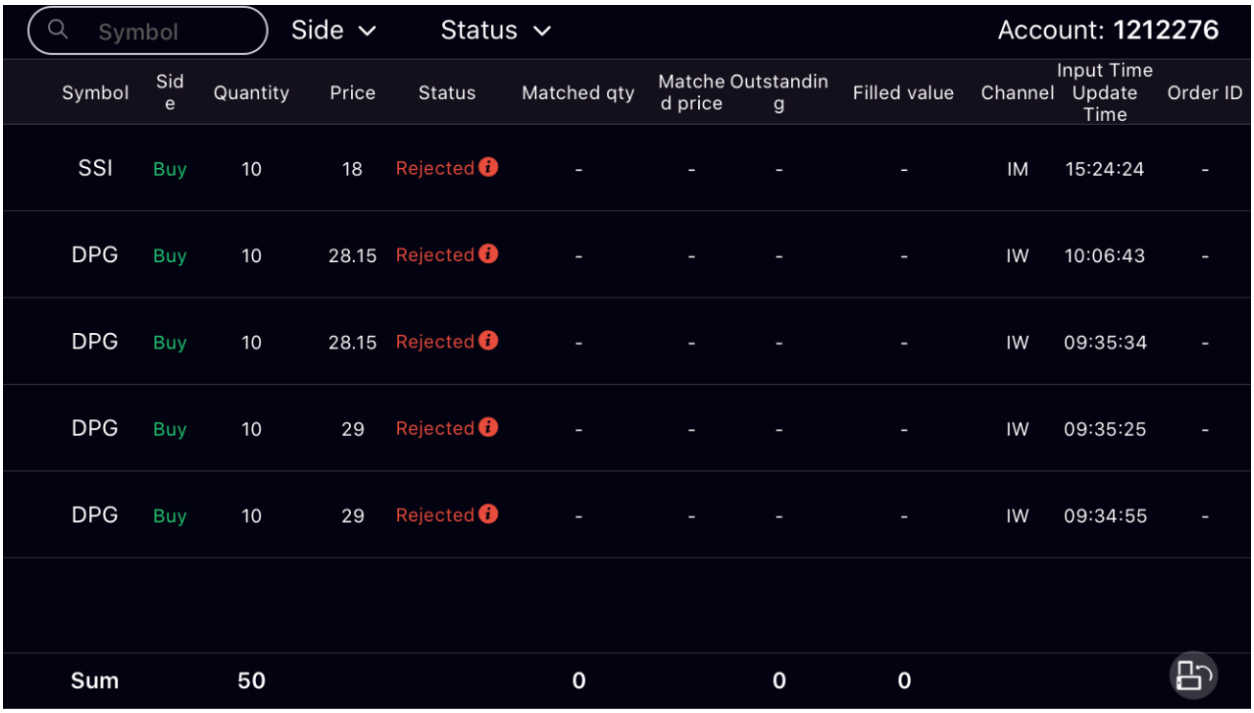
a. View order book

- To open order book, you can click Trading > Order list



- To check more detailed information of your order, you can click button to switch to landscape screen



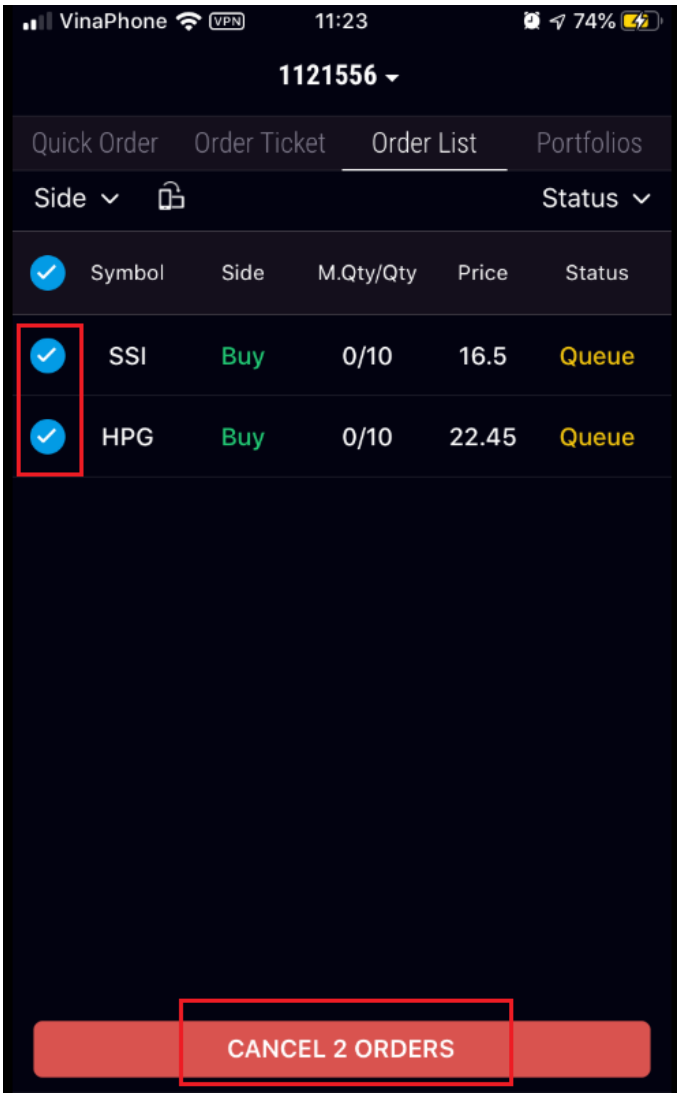


- To sort your orders, you can click button Side or Status to sort your order depending on Side or Status

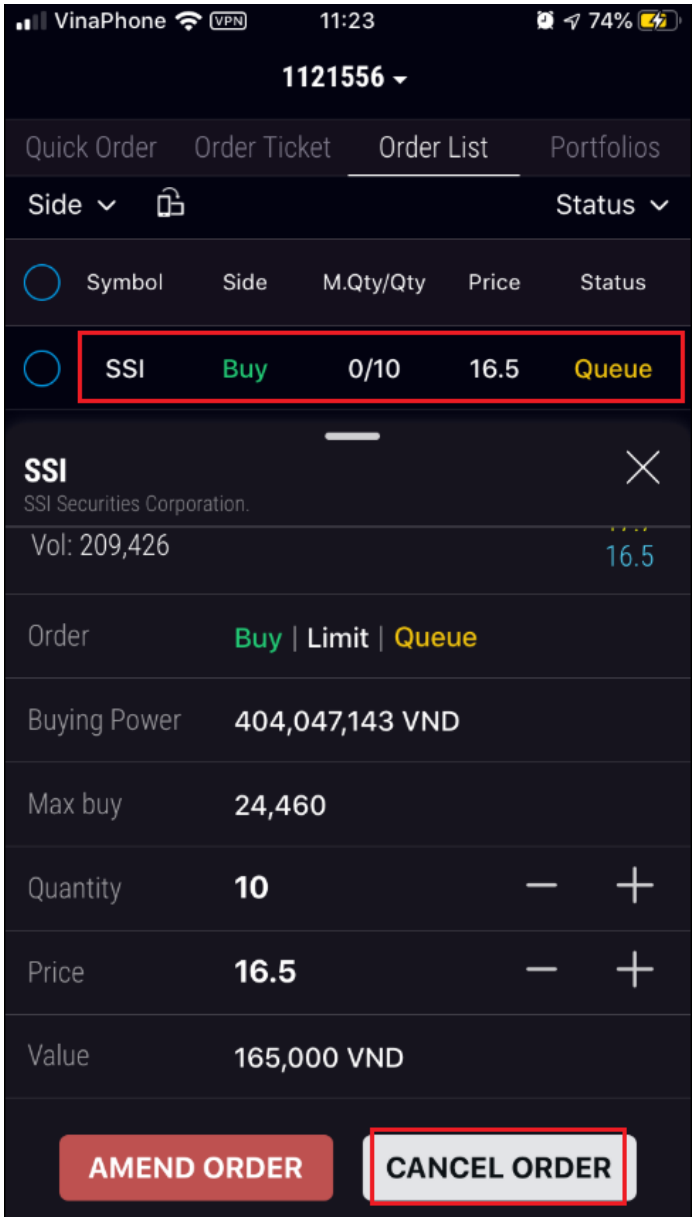
b. Cancel order

- There are 2 ways to cancel orders:

- Option 1: Click on button before the order you want to cancel > Click Cancel orders

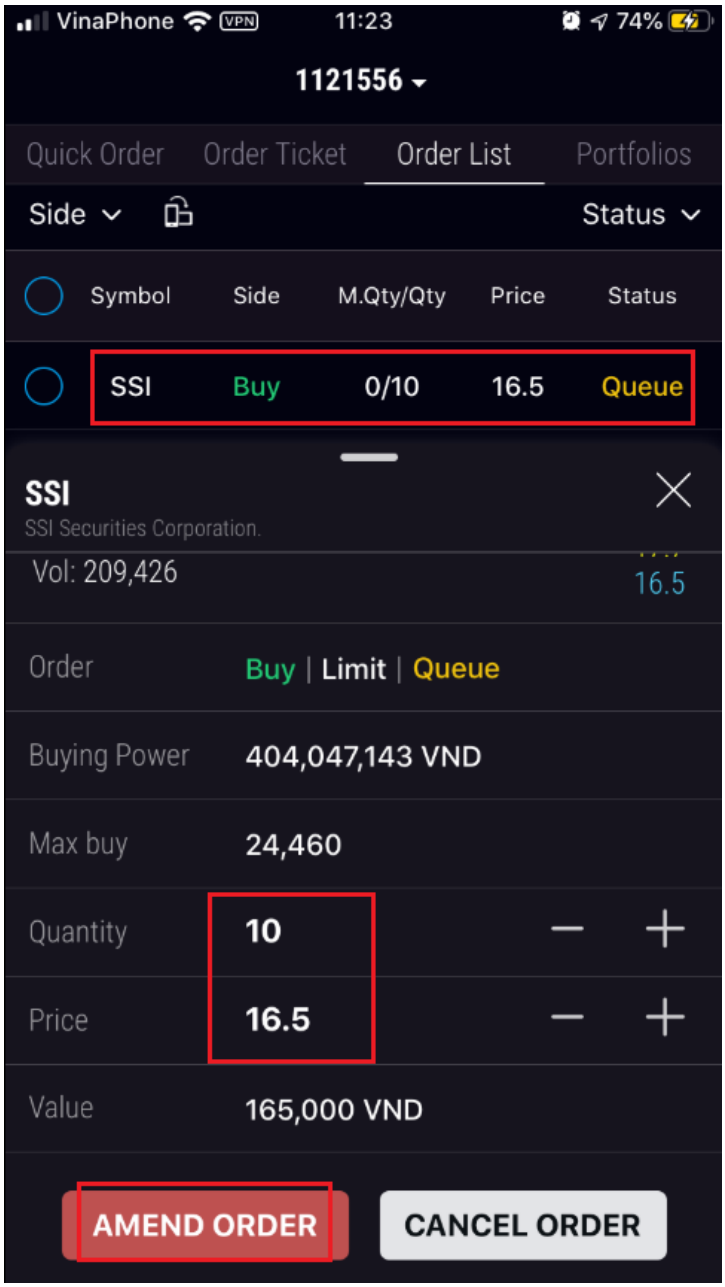


- Option 2: Click on the order you want to cancel > Click Cancel order in the pop-up screen



c. Modify order

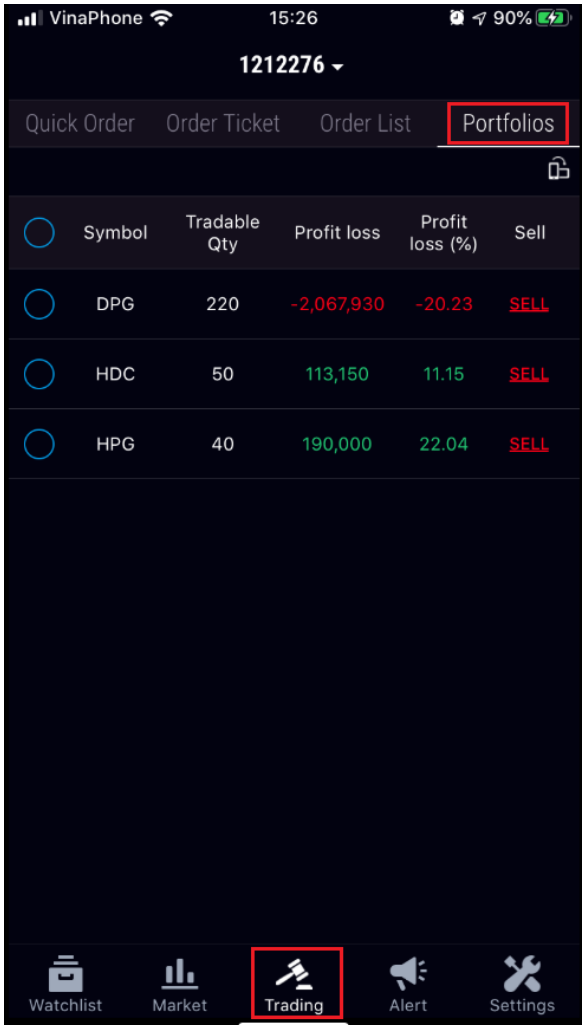
- To modify order, you can click on the order you want to modify > Enter new Quantity/Price > Click Amend order



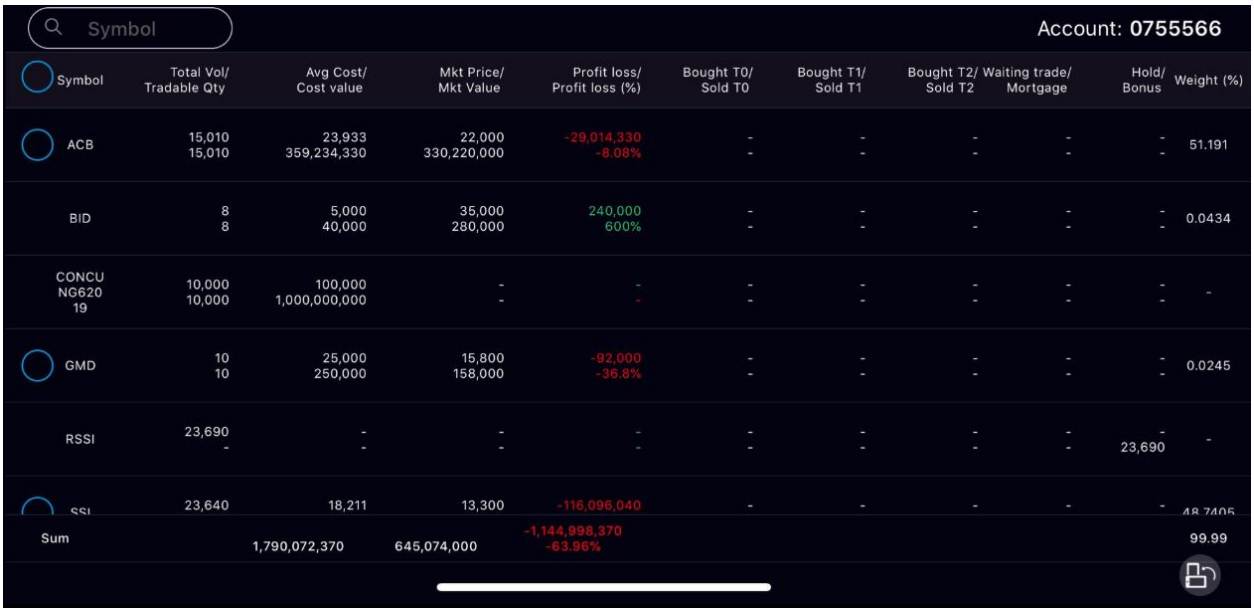
5. Portfolio

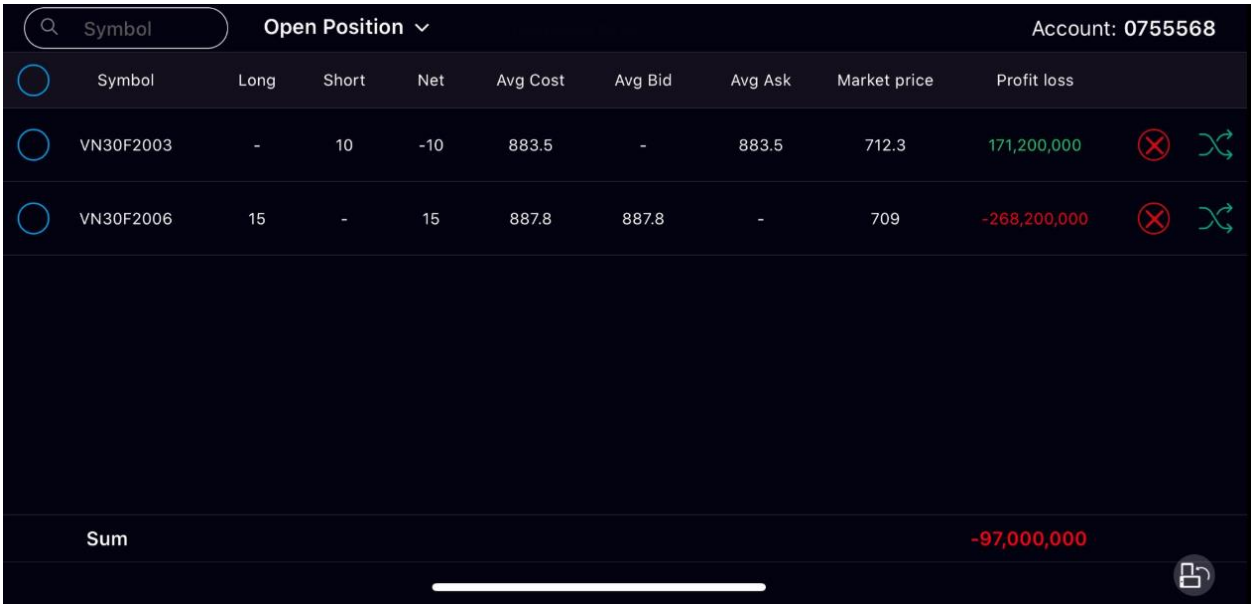
a. View Portfolio

- To open portfolio, you can click Trading > Portfolio



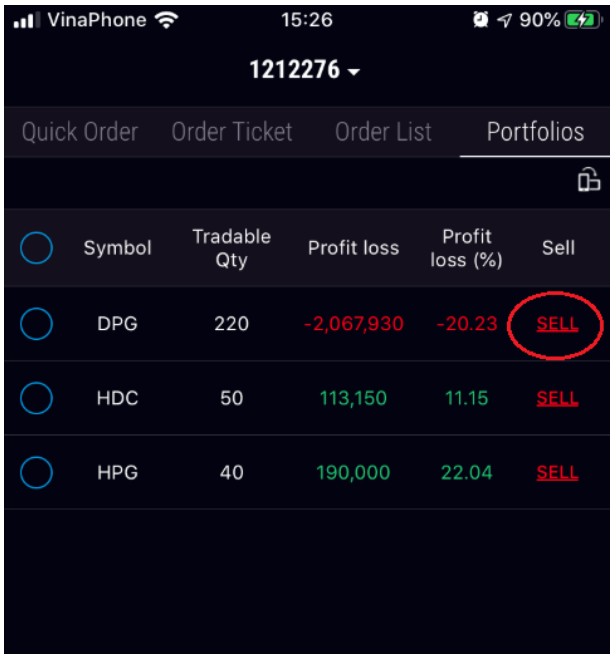
- To check more detailed information of your portfolio, you can click button to switch to landscape screen

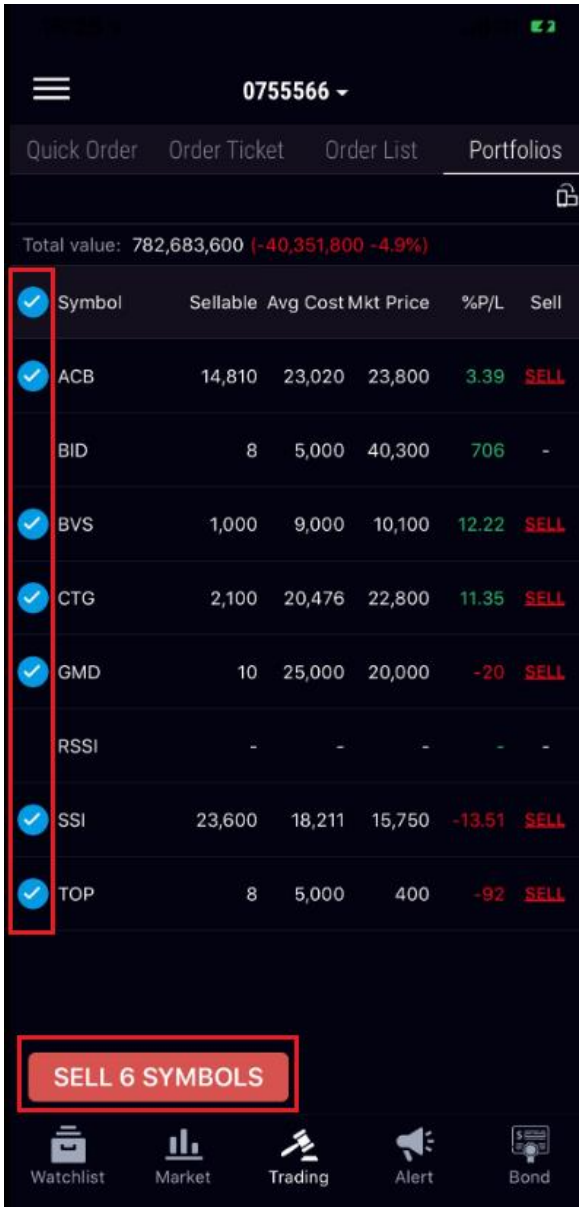


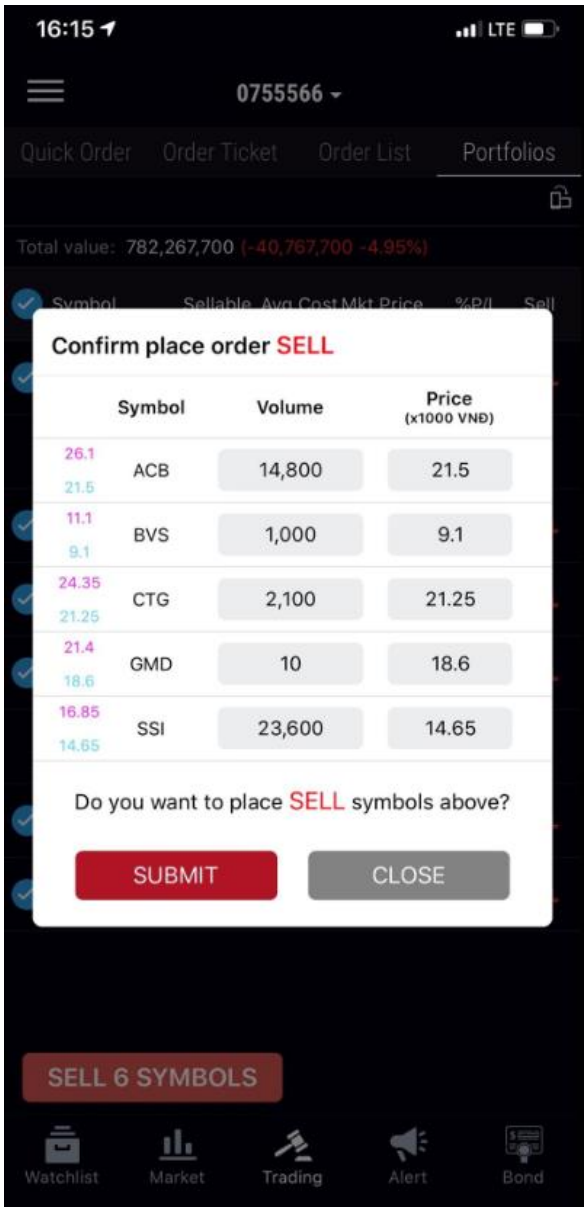


b. Sell stock symbol on portfolio

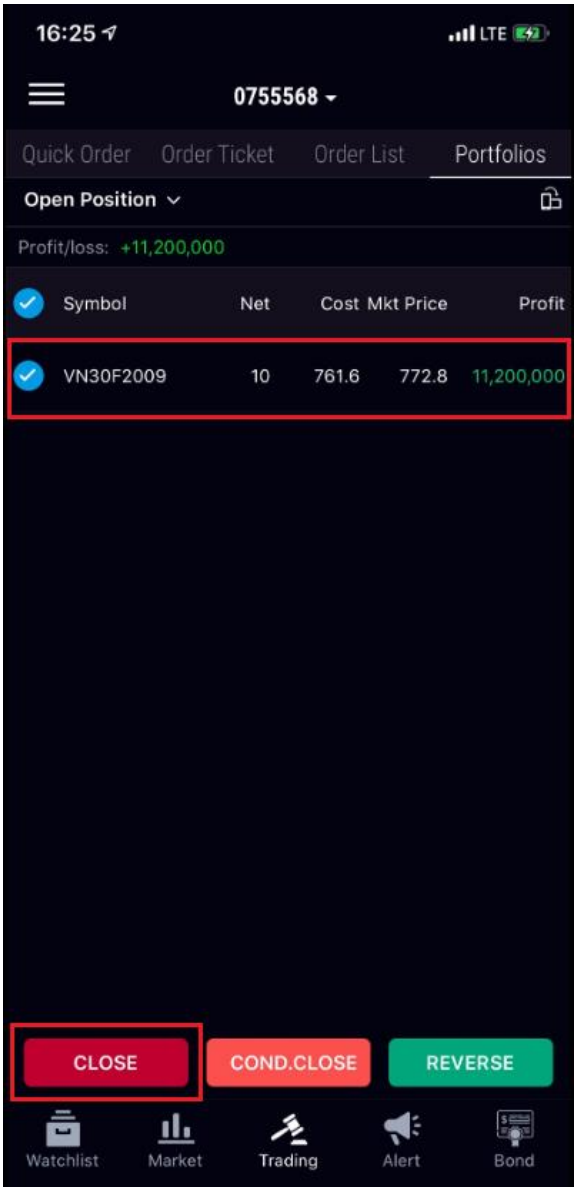
- *For stock symbols*:
  - Click on Sell button on the symbols that you want to sell, the system will switch to order ticket screen (if you sell 1 stock symbol) or pop up specific order ticket for many stock symbols (if you sell many stock symbols at the same time), you can modify orders if you want.
  - However, the system will automatically fill in the best bid price (if you sell 1 stock symbol) or floor price (if you sell many stock symbols), and default quantity is the available quantity in your portfolio.

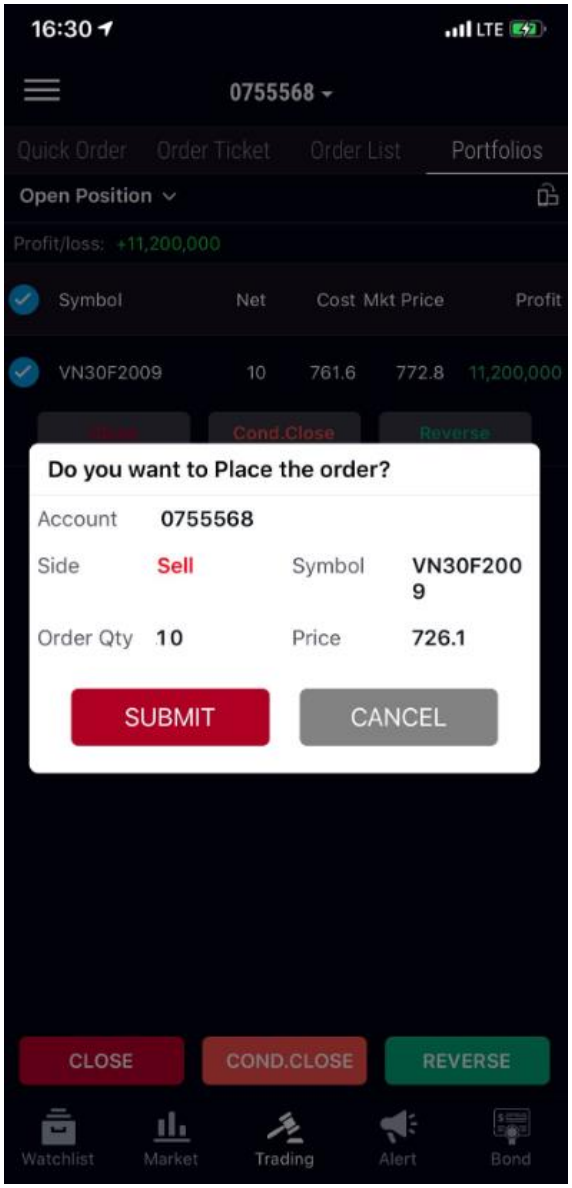






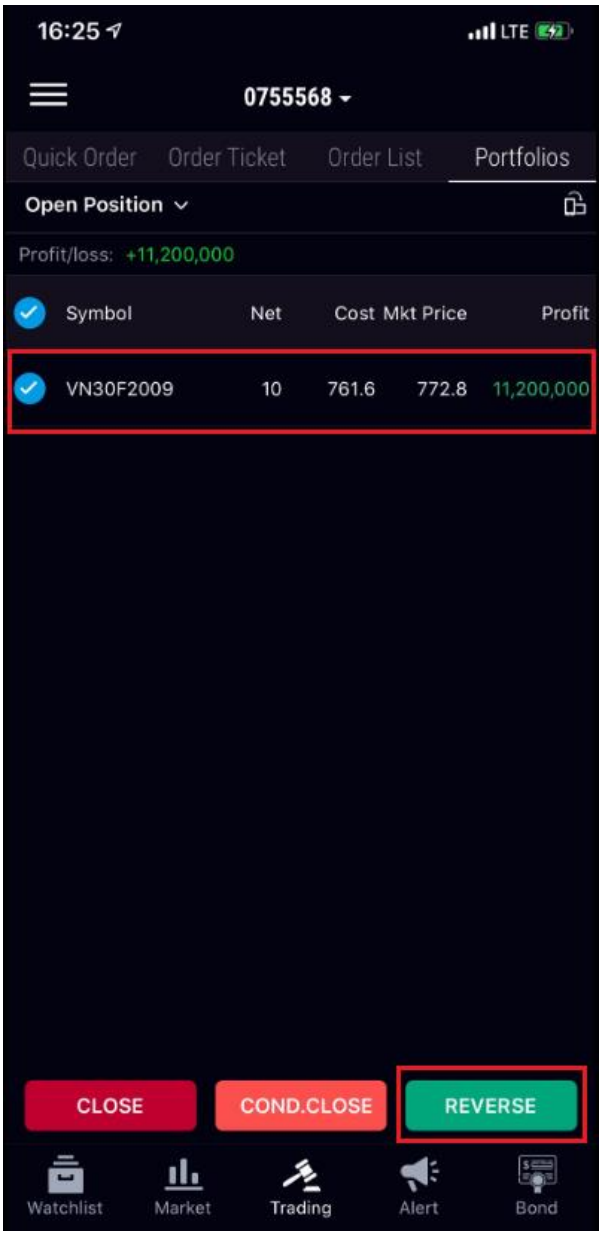
- *For derivative symbols*:
  - Choose the derivative symbols you want to close position, then click Close, the system will have the default price and quantity for close orders, and you cannot modify orders. Depending on your confirmation mode is on or off, you may have to confirm your orders before sending it to the system.
  - Default close order information:
    - Quantity: the number of positions you are holding
    - Price: Ceiling/Floor price (depending on your order is Long or Short, and apply in LO session), ATO (in ATO session), ATC (in ATC session).

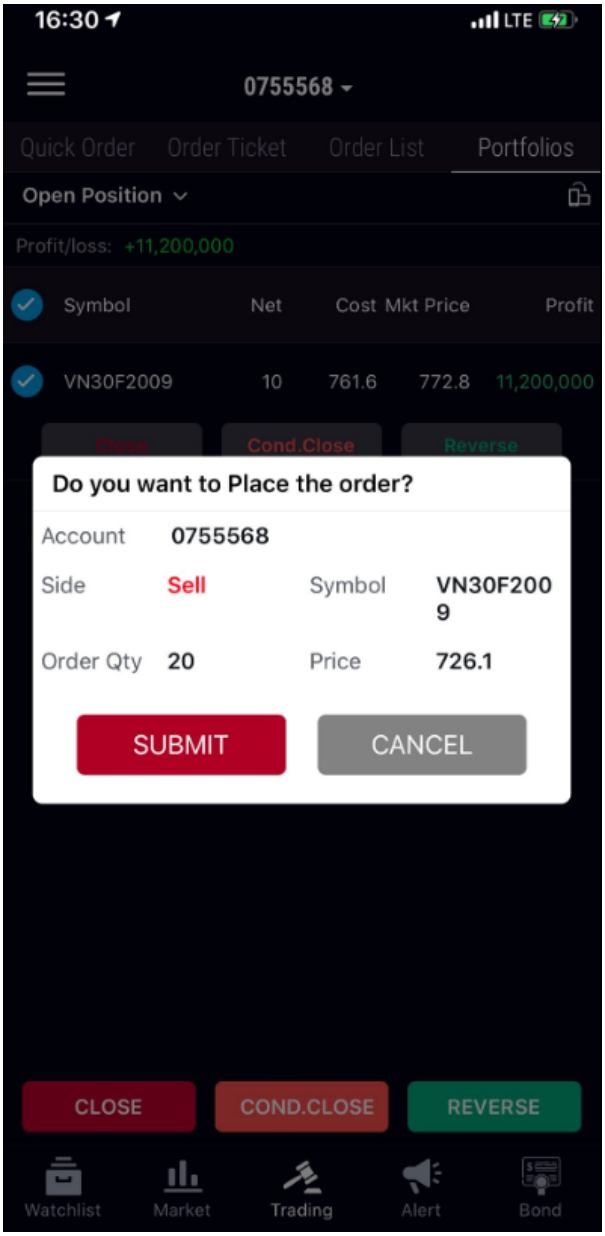




c. Reverse position on portfolio

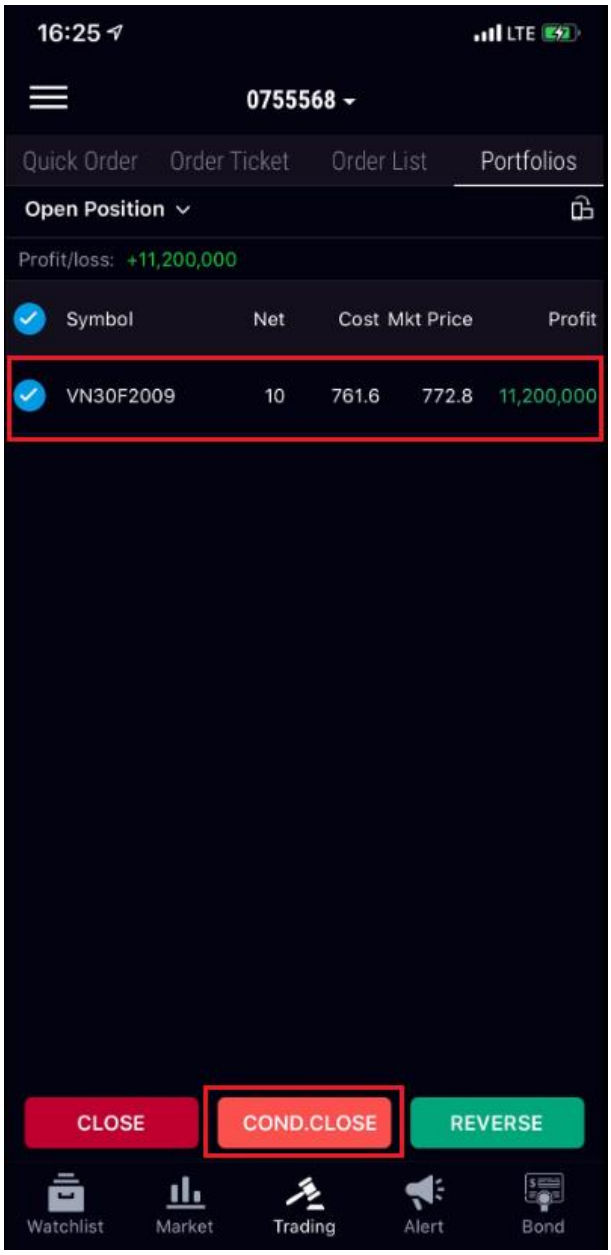
- Reverse position: when you reverse your position, the systems will help you to open new opposite position with the same number as your existing position. For example, you have 2 Long position, when you reverse position, the system will place 4 short position to close your existing position and open 2 new Short position.
- To reverse position, you choose the symbols and click Reverse, the system will have default order with filled quantity and price, you cannot modify order. Depending on your confirmation mode is on or off, you may have to confirm your order before sending it to the system.
- Default close order information:
  - Quantity: double the number of positions you are holding
  - Price: Ceiling/Floor price (depending on your order is Long or Short, and apply in LO session), ATO (in ATO session), ATC (in ATC session).





d. Close position with OCO conditional order on portfolio

- The system supports you to close position with OCO conditional order (close position with expected target price (take profit), combined with a cut loss order). For more detail information about this type of order, you can go to Place conditional orders for derivative.
- To close position with OCO conditional order, you can choose the symbol then click Conditional order, the system will switch to conditional order ticket for you to place order.

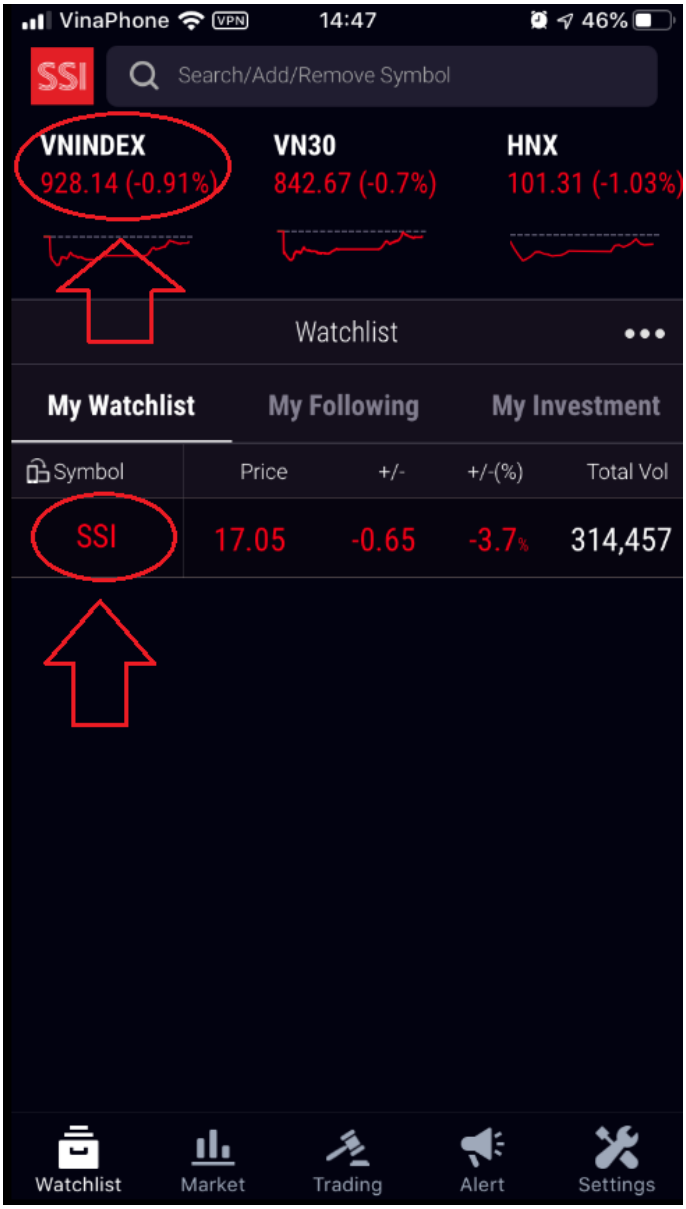


NOTE: Close position, Reverse position and Close position with conditional order are used when you need to react quickly to the market. Please consider when using these function.

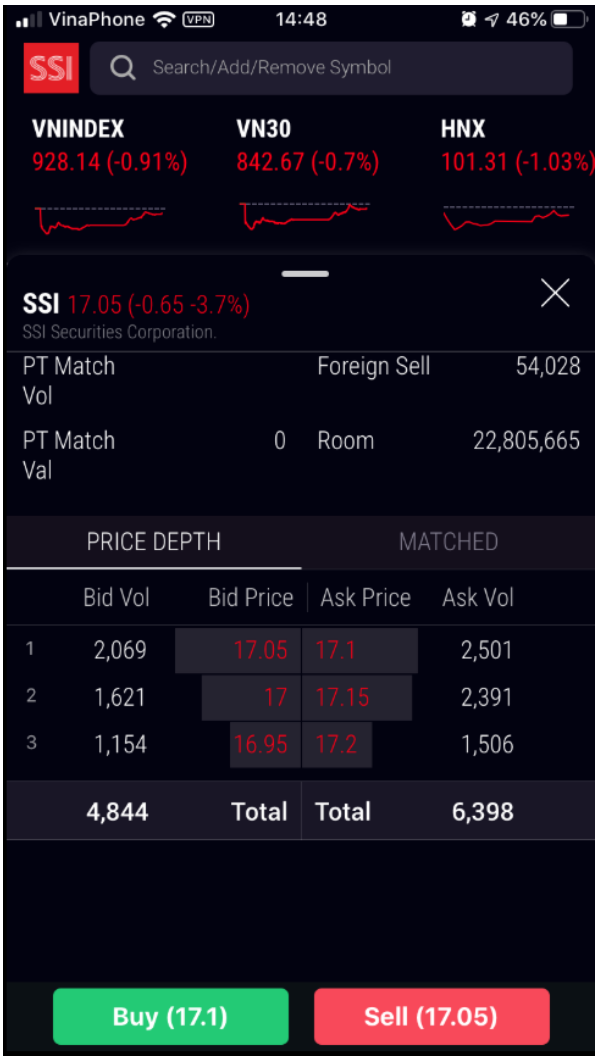
B. FUNCTIONS ON PRICE BOARD

1. View Chart, Market depth and Time and Sale

- Step 1: Click on the symbol or index you want to see more detailed information



- Step 2: The detail screen includes the following information: TradingView chart, Stock information, Price depth, Time and Sale. You can scroll down to see information.

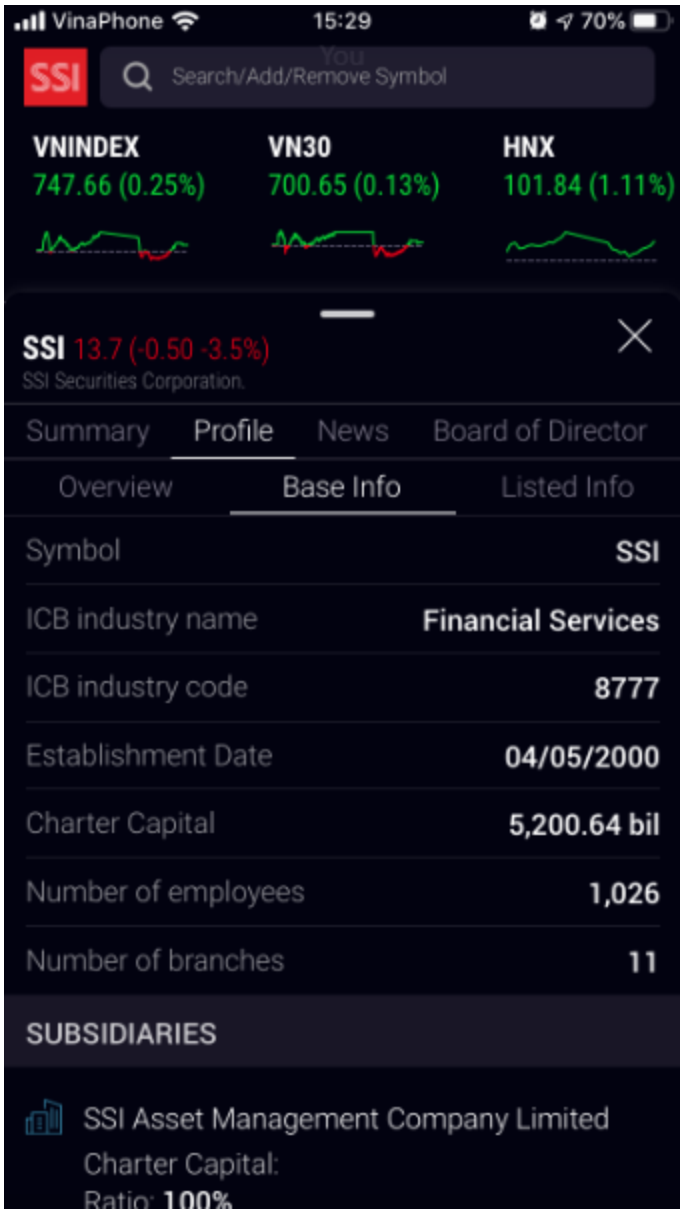


- Step 3: You can click button to view chart in landscape screen. With this function, you can use Indicators and other functions like the web version of iboard

2. View Company profile

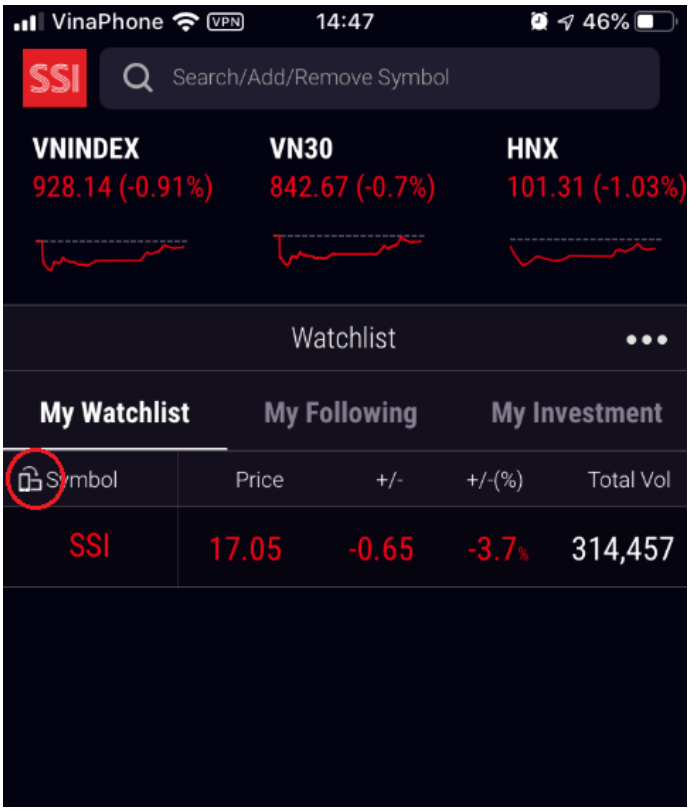
- Step 1: Click on stock symbol that you need to view detailed information

- Step 2: Choose information about company on horizontal bar, you can swipe left to view other information

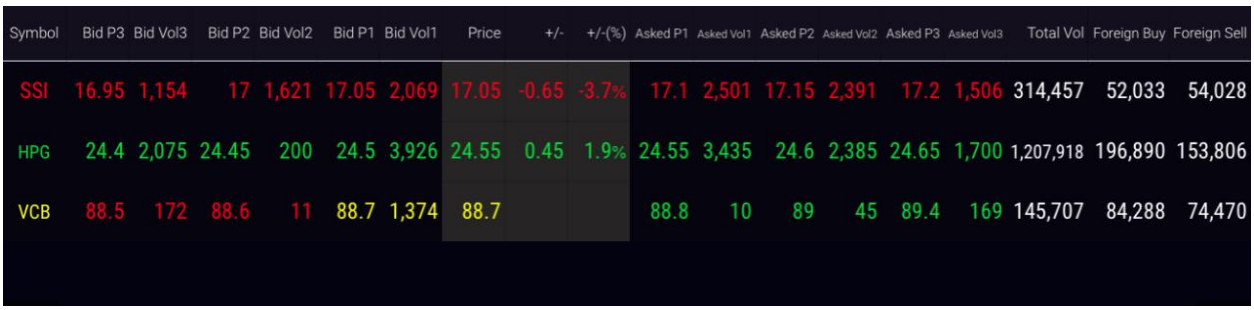


3. View more detailed price board with landscape screen

To view price board in landscape screen, you can click on button next to Symbol



And here is the price board you can see (with full information like web version)



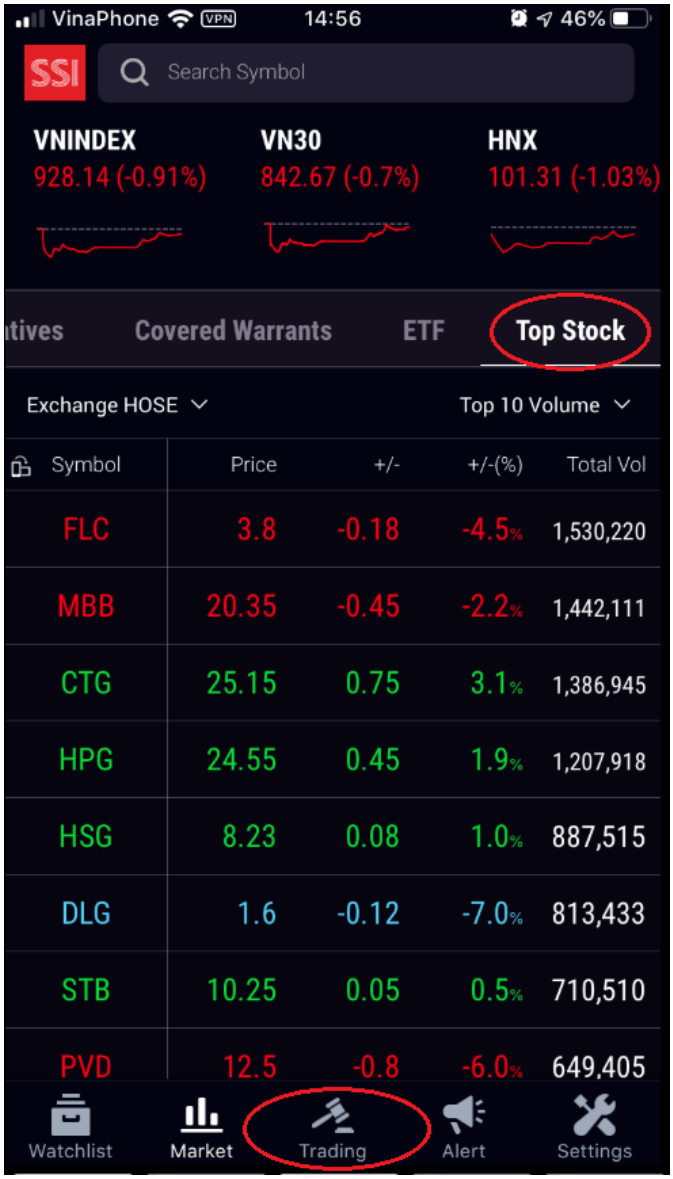
Symbol	Bid P3	Bid Vol3	Bid P2	Bid Vol2	Bid P1	Bid Vol1	Price	+/-	+/-(%)	Asked P1	Asked Vol1	Asked P2	Asked Vol2	Asked P3	Asked Vol3	Total Vol	Foreign Buy	Foreign Sell
SSI	16.95	1,154	17	1,621	17.05	2,069	17.05	-0.65	-3.7%	17.1	2,501	17.15	2,391	17.2	1,506	314,457	52,033	54,028
HPG	24.4	2,075	24.45	200	24.5	3,926	24.55	0.45	1.9%	24.55	3,435	24.6	2,385	24.65	1,700	1,207,918	196,890	153,806
VCB	88.5	172	88.6	11	88.7	1,374	88.7			88.8	10	89	45	89.4	169	145,707	84,288	74,470

4. View price board of different exchange

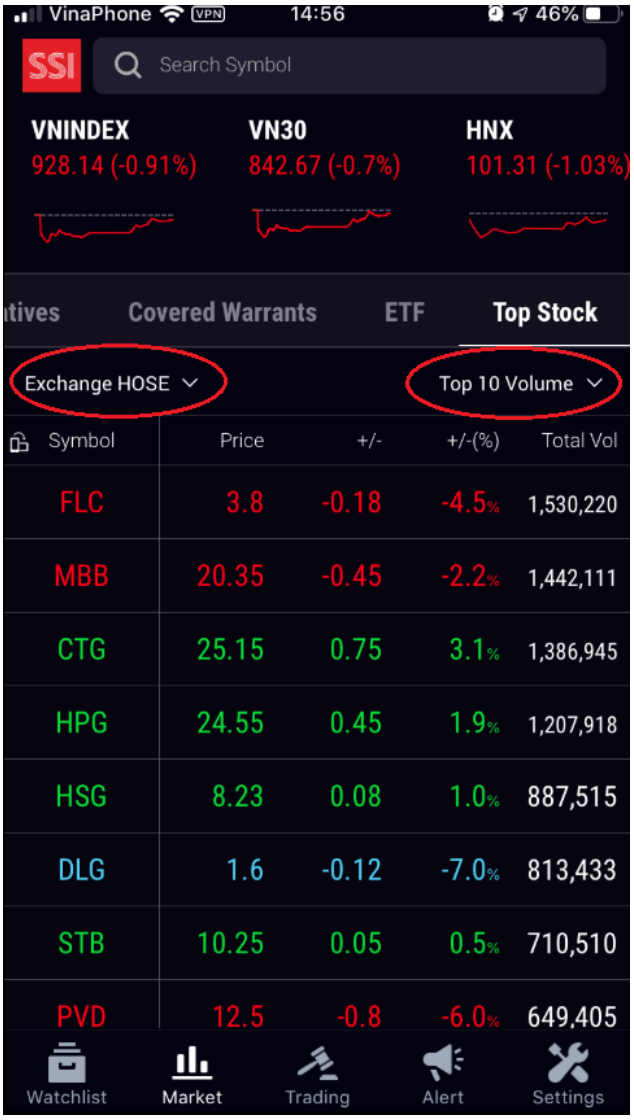
- Step 1: Click on Market
- Step 2: Choose exchange that you want to view price board on horizontal bar header

5. View Top Stock

- Step 1: Click on Market > Choose Top Stock on horizontal bar header



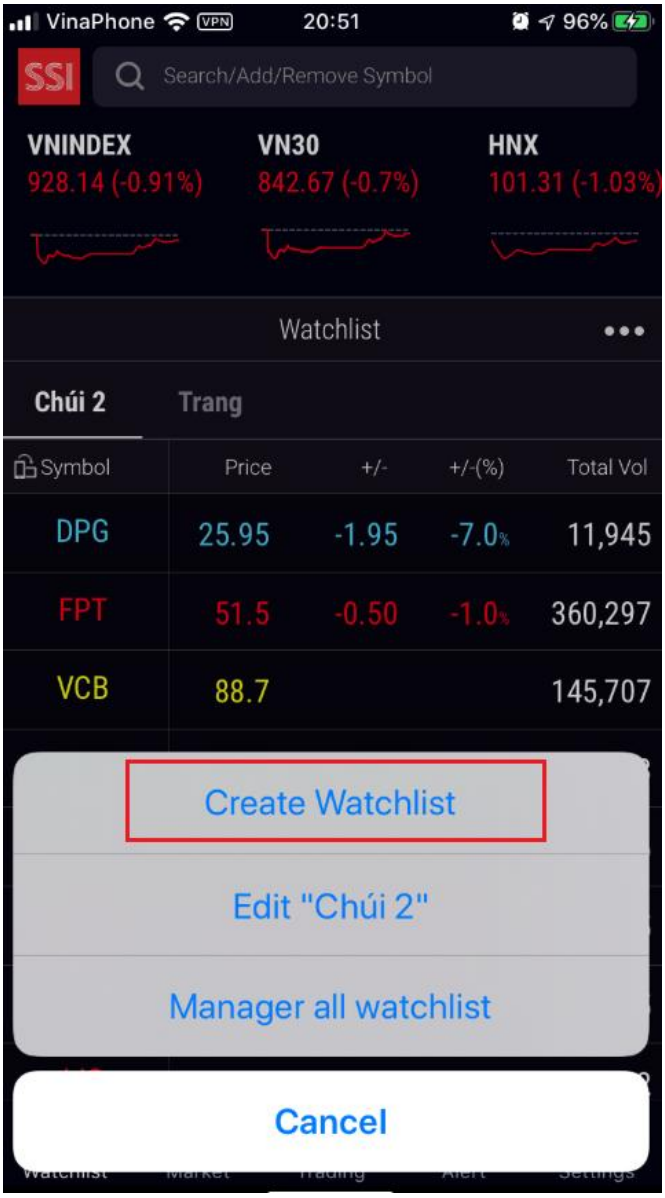
- Step 3: Choose exchange and condition



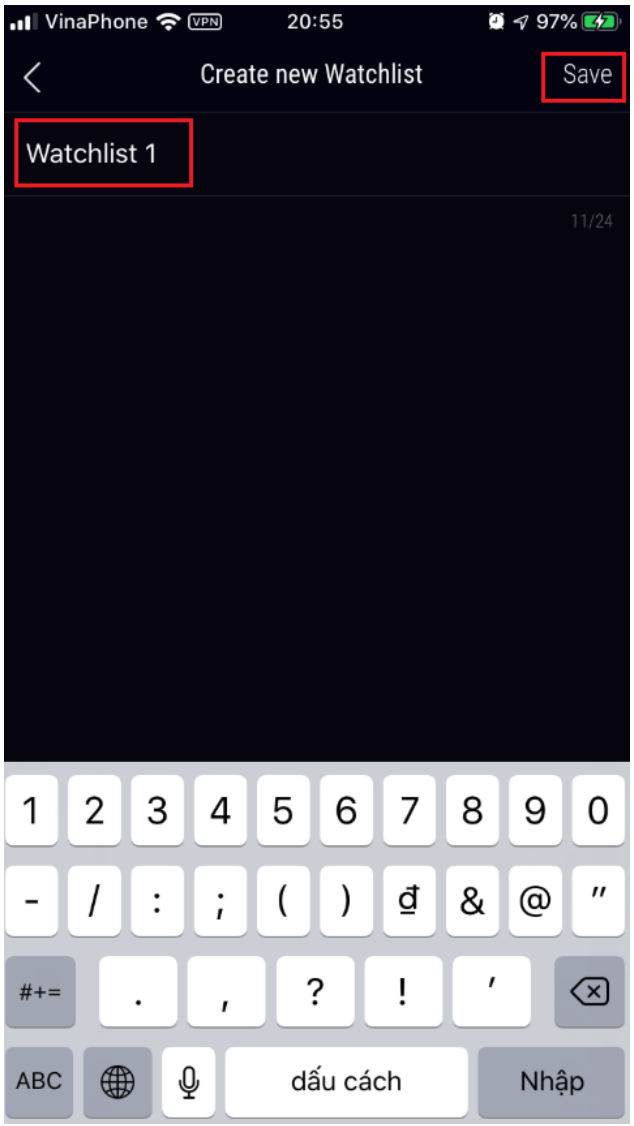
C. WATCHLIST

1. Create Watchlist

- Step 1: Click on button ••• on Watchlist screen
- Step 2: Create Watchlist

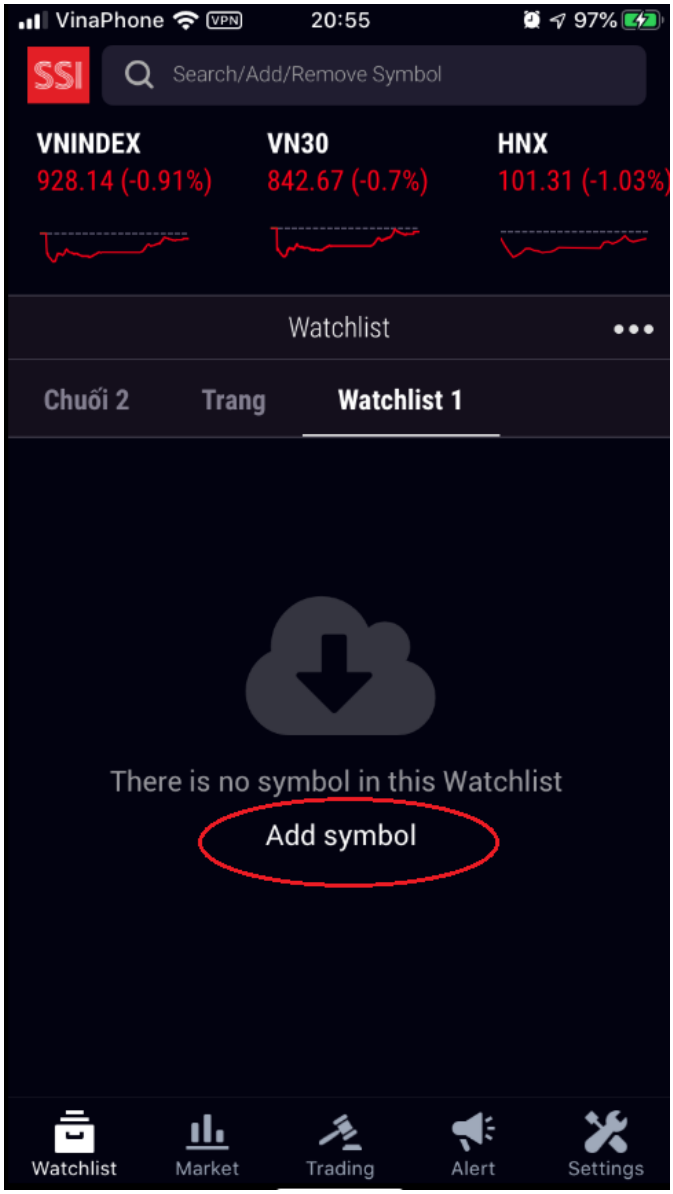


- Step 3: Enter name of watchlist > Save

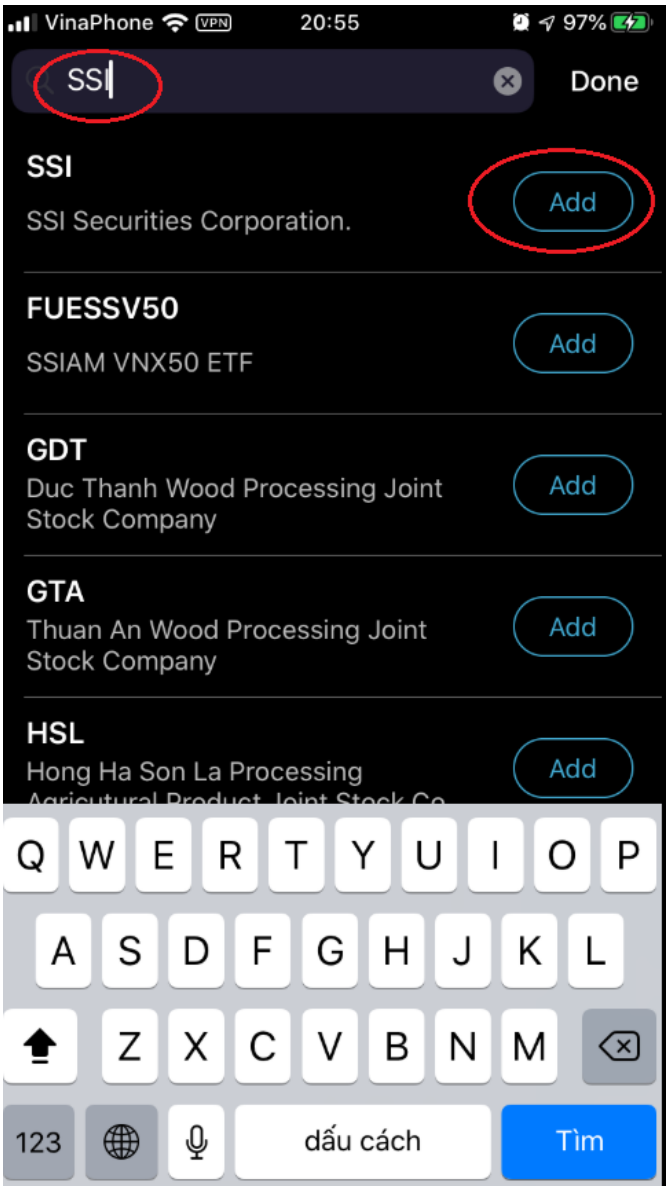


2. Add new stock symbol into watchlist

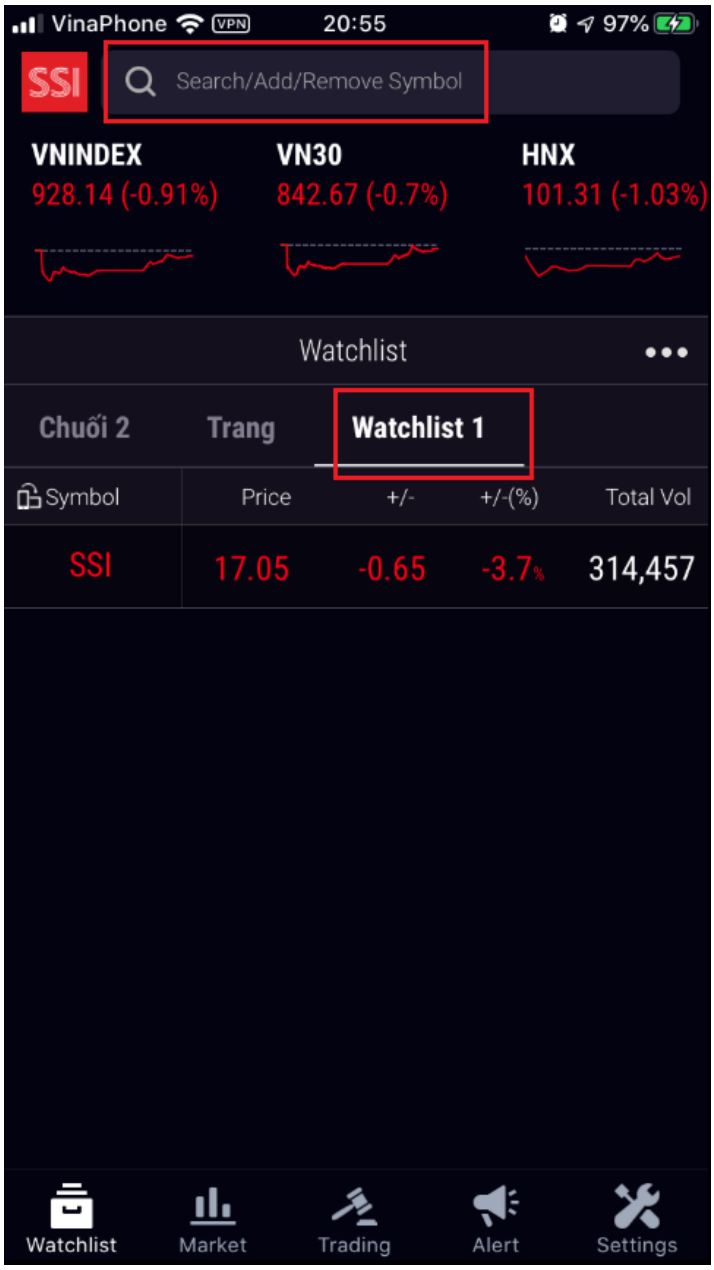
- Step 1: After creating watchlist, you can click Add Symbol to add new stock symbol into watchlist



- Step 2: Enter stock symbol > click Add



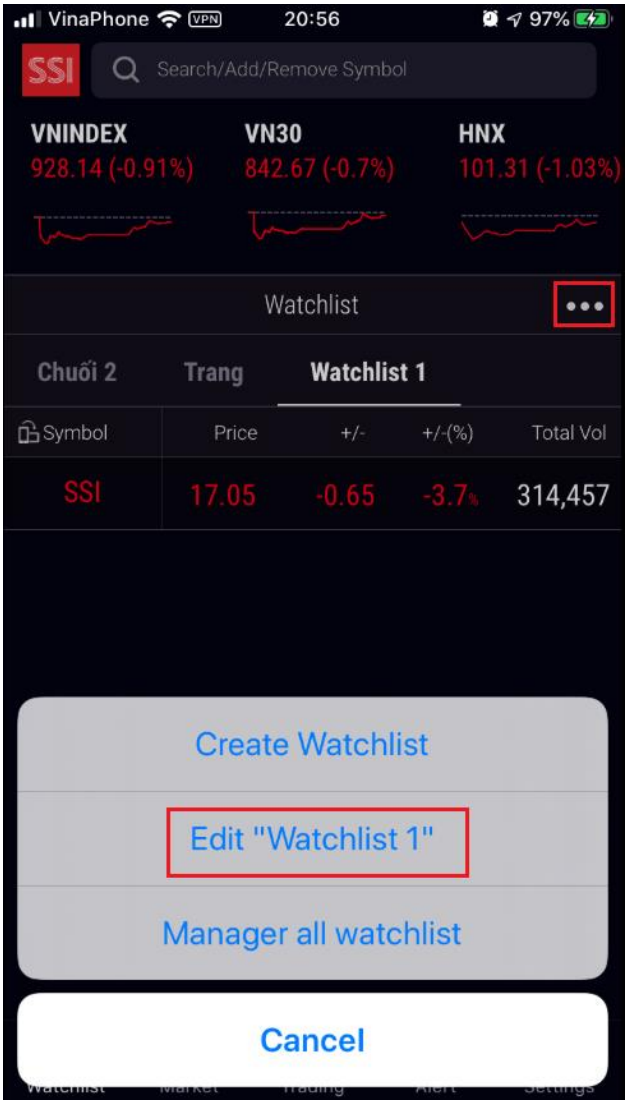
- Step 3: To add more stock symbol, you can enter symbol on searching bar > Add Để thêm mã nữa, khách hàng đứng tại Watchlist cần add mã, điền mã CK vào ô thông tin phía trên và án nút Thêm



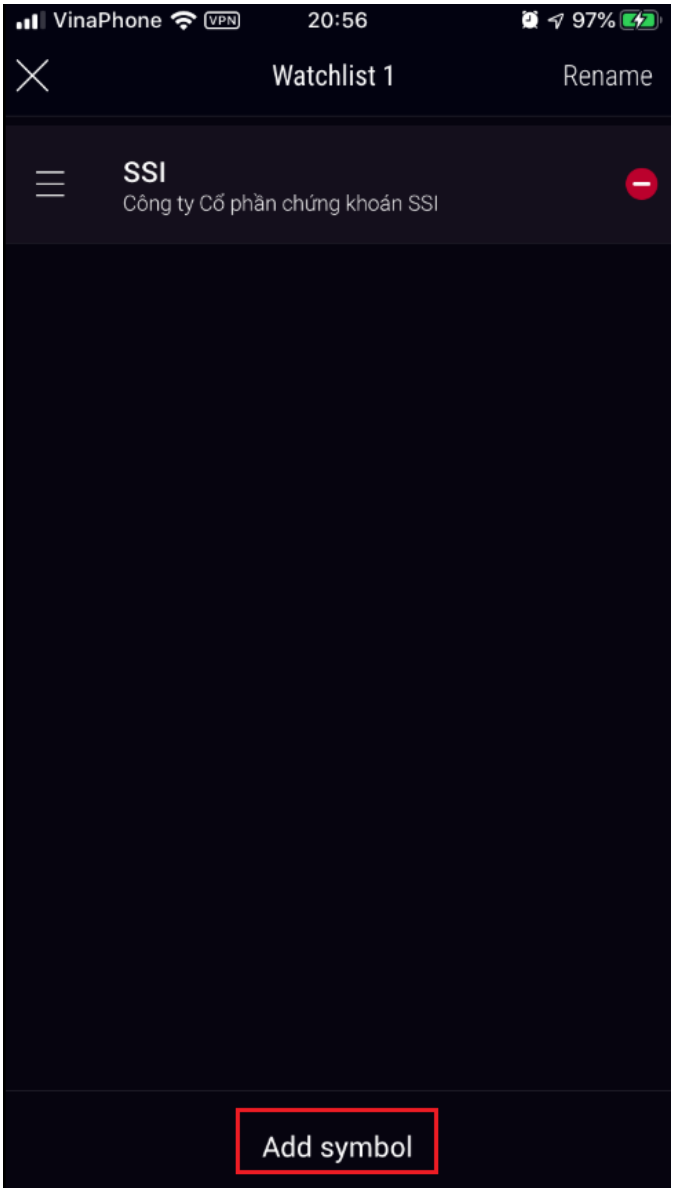
3. Edit Watchlist

You can add new stock symbol, delete symbol in watchlist, rename and change the position of symbols in watchlist

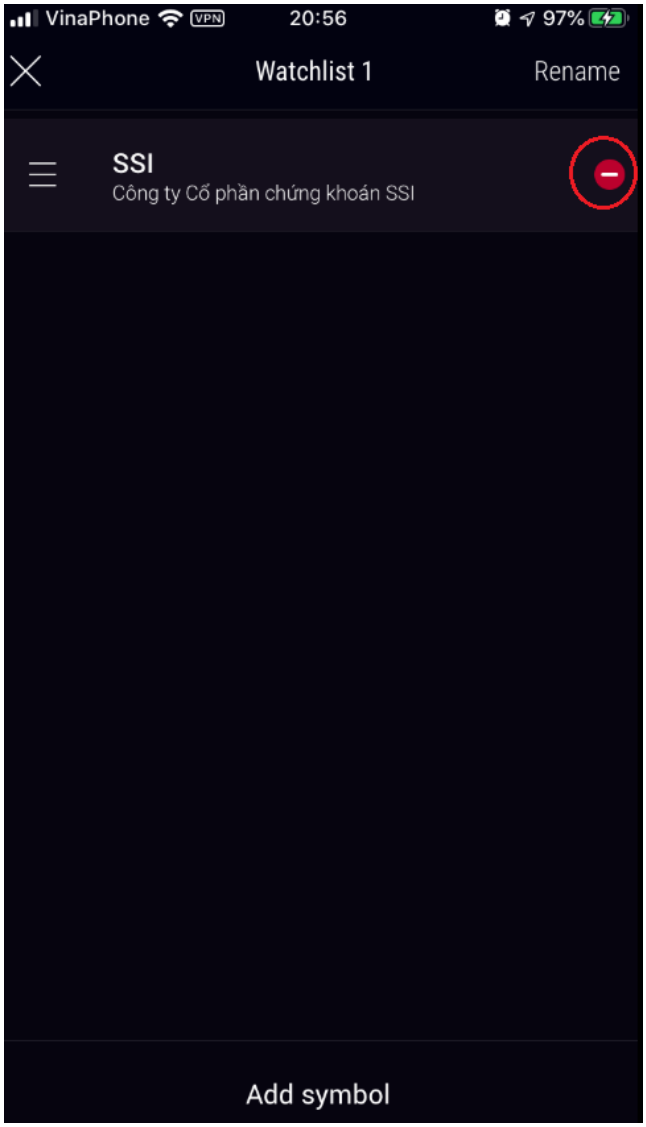
- Step 1: Click button ••• on Wachlist screen, choose Edit Watchlist

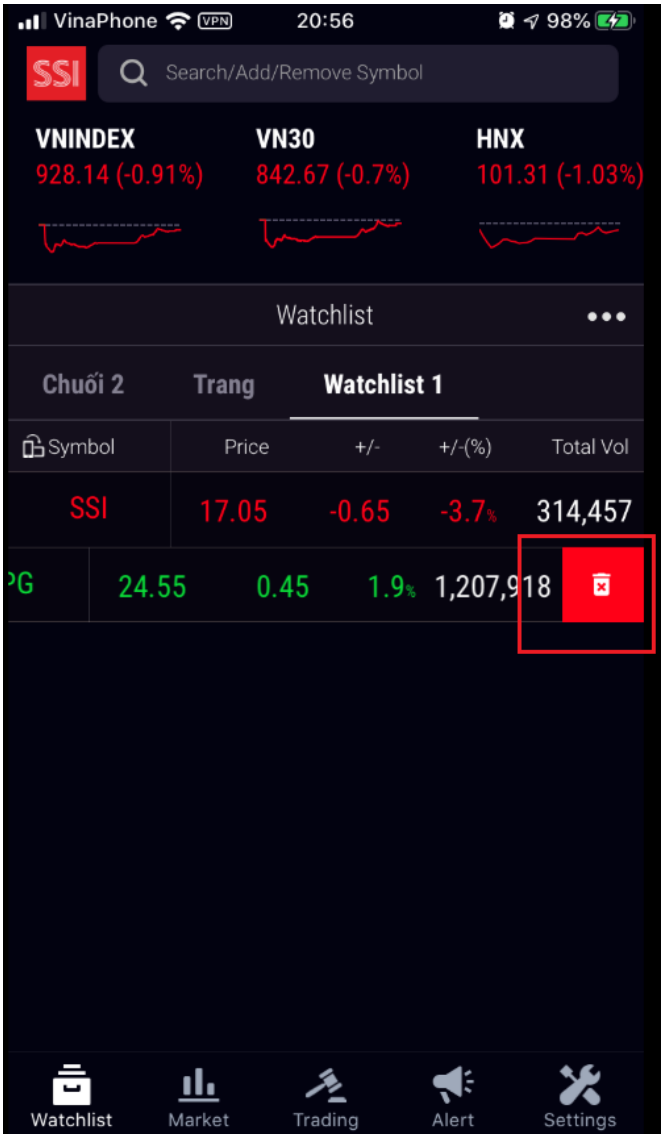


- Step 2: To add new stock symbol, you can click Add symbol

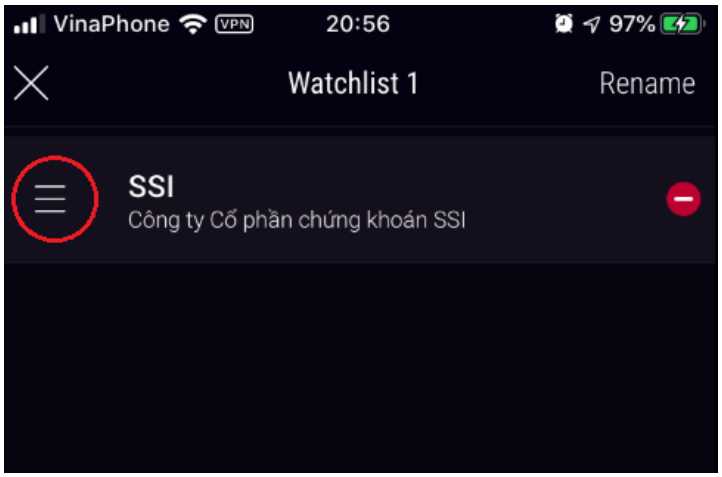


- Step 3: To delete stock symbol from watchlist, there are 2 ways:
    - Option 1: Click button on the row of that symbol
    - Option 2: Swipe left at the symbol you want to delete (on the watchlist screen)

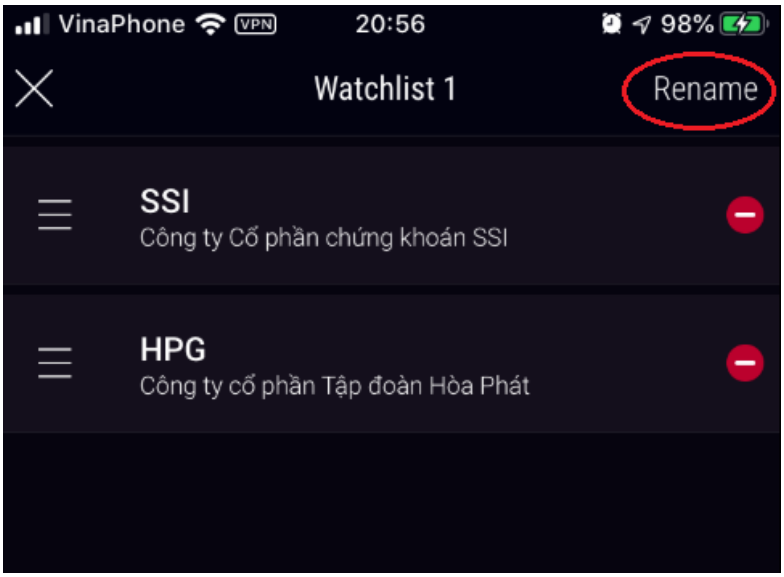

VinaPhone
VPN
20:56
97%
Watchlist 1
Rename
SSI
Công ty Cổ phần chứng khoán SSI
Add symbol

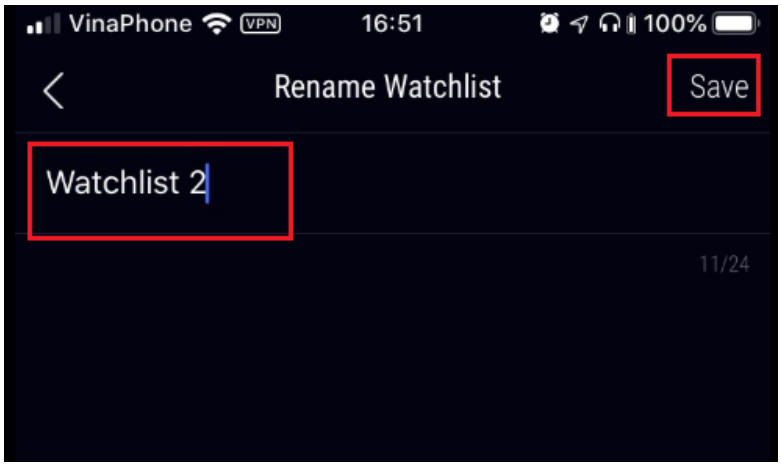


- Tep 4: Tp change the position of stock symbol in watchlist, you can hold button ☰ then drag and drop the symbol to the position you want



- Step 5: To rename watchlist, you can click Rename, then Save

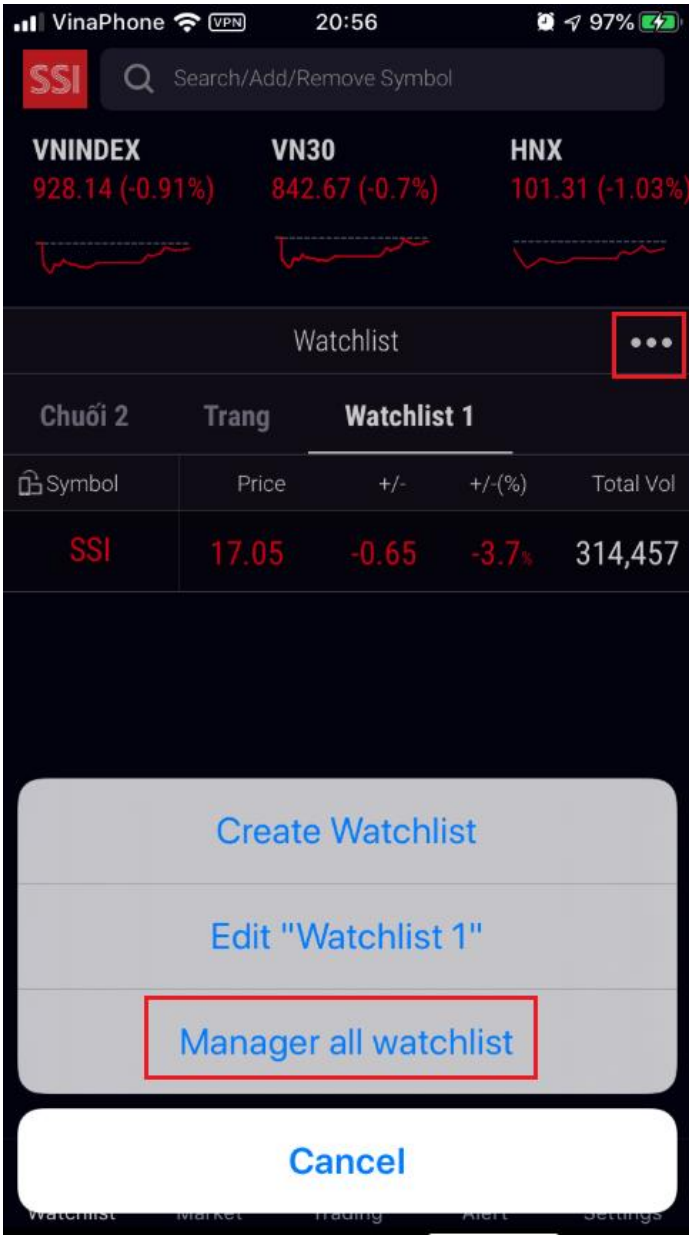




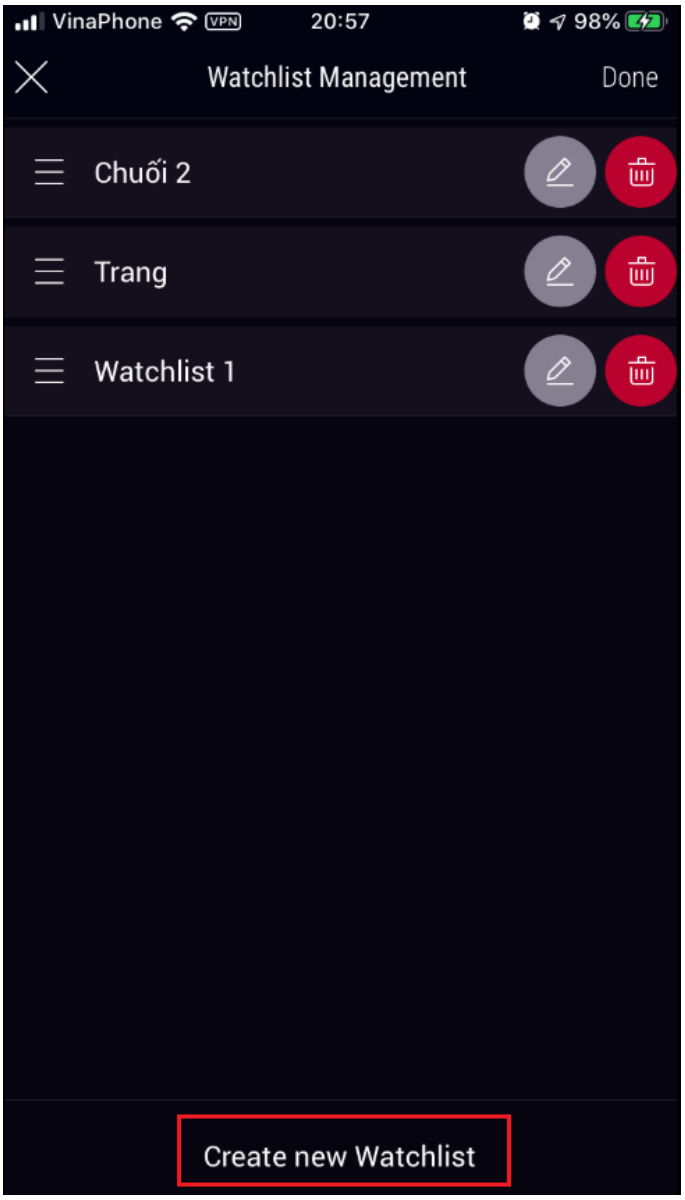
4. Watchlist management

You can create new watchlist, rename, delete or change position of watchlist

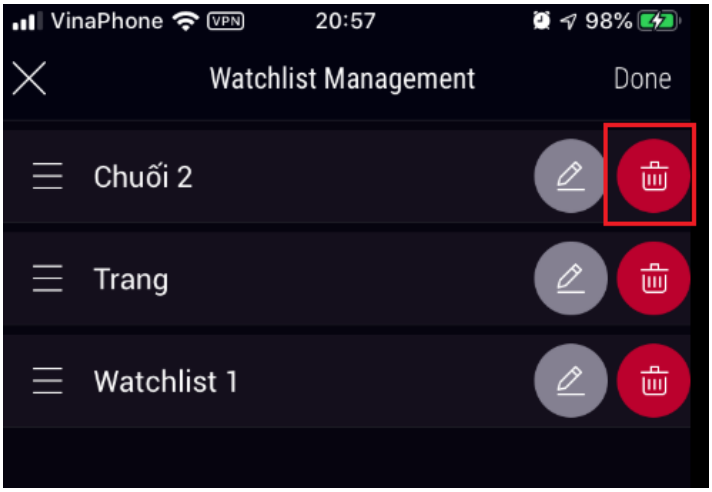
- Step 1: Click button ••• on Wachlist screen, choose Manage all watchlist



- Step 2: To create new watchlist, you can click on Create new watchlist

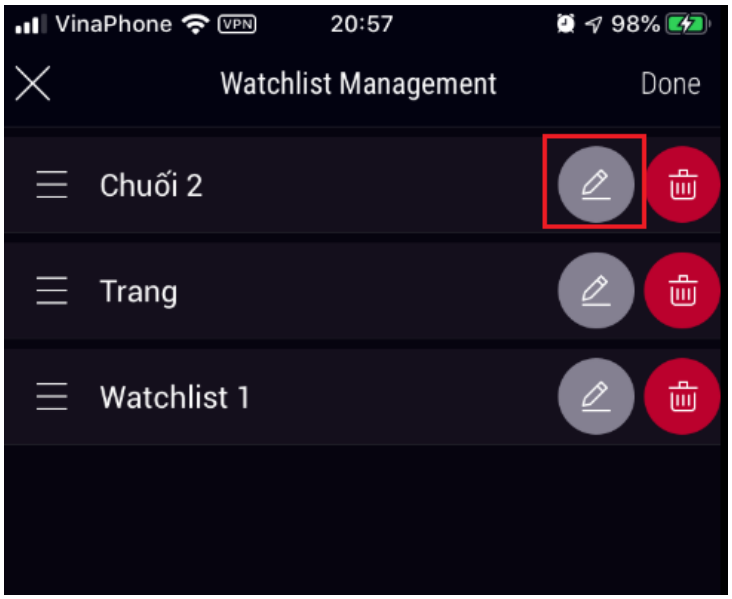


- Step 3: To delete watchlist, you can click button on the row of that watchlist



- Step 4: To change the position of watchlist, you can hold button ☰ then drag and drop to new position

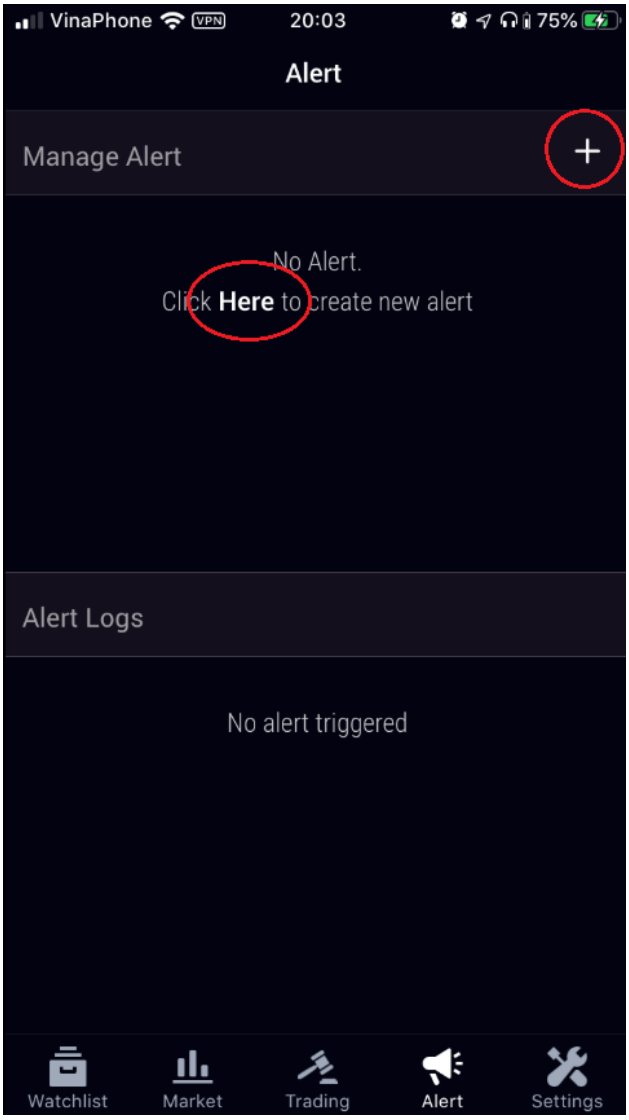
- Step 5: Click on button to rename watchlist > Enter new name > Save



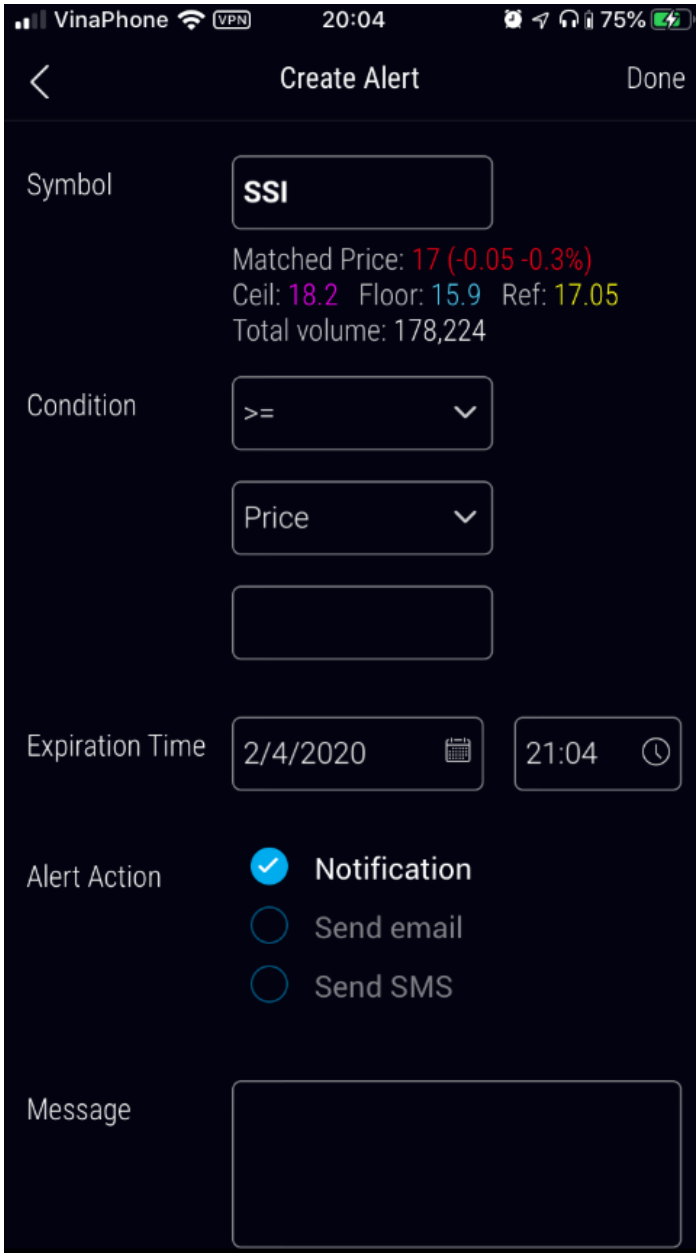
D. OTHER FUNCTIONS

1. Alert

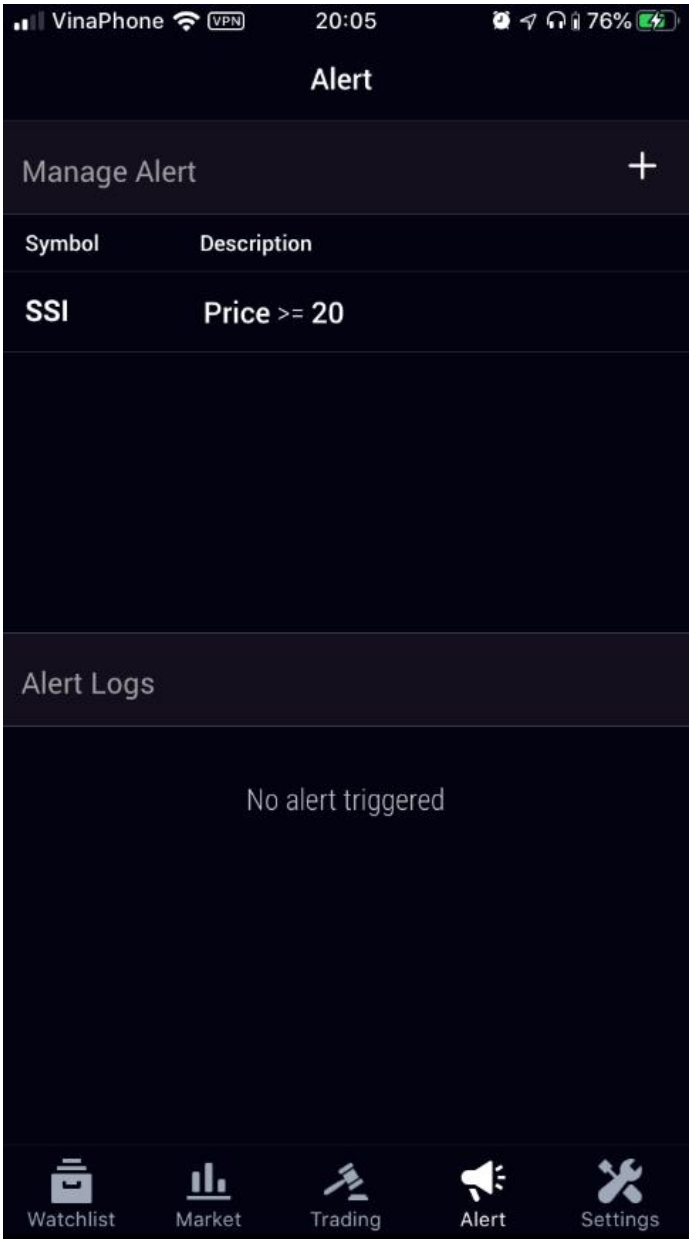
- Step 1: Click Alert
- Step 2: Click here or button “+” to create new alert



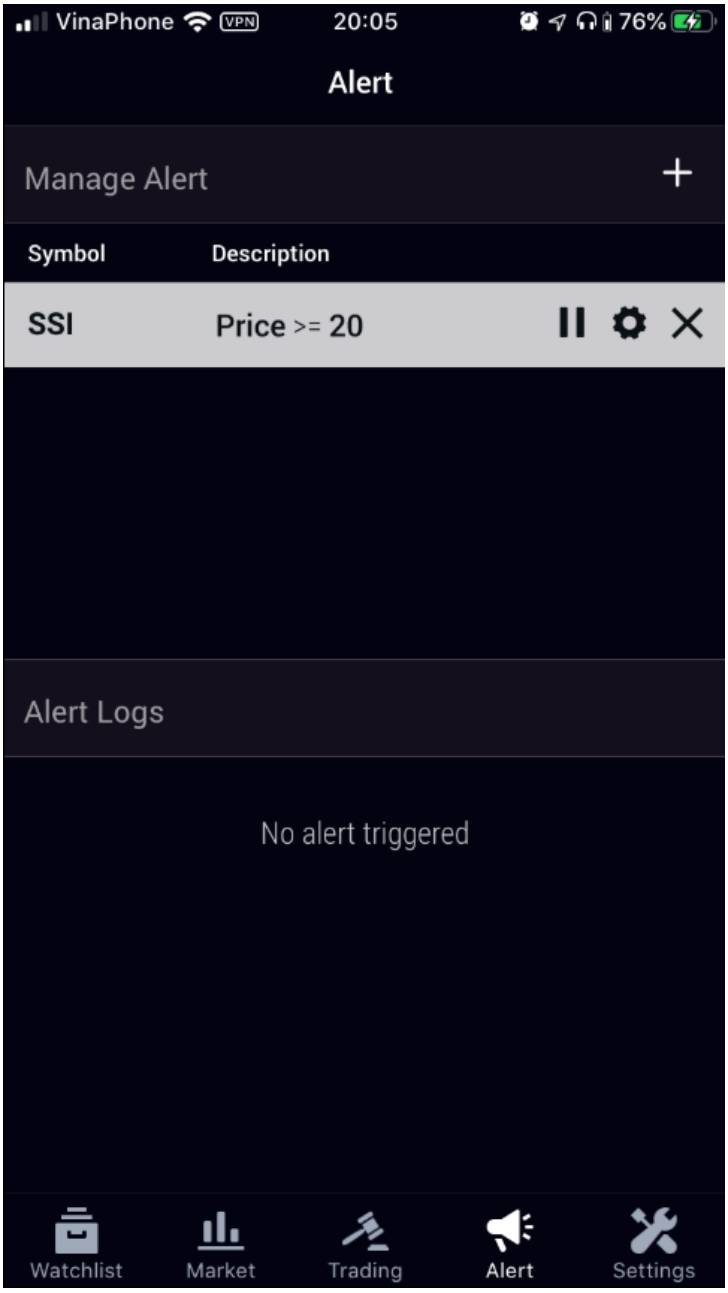
- Step 3: Enter stock symbol, conditions and expiration time > Done



- Step 4: After creating alert, your alert that are still valid will be shown in Manage alert screen. After expiry, it will be moved to Alert logs.

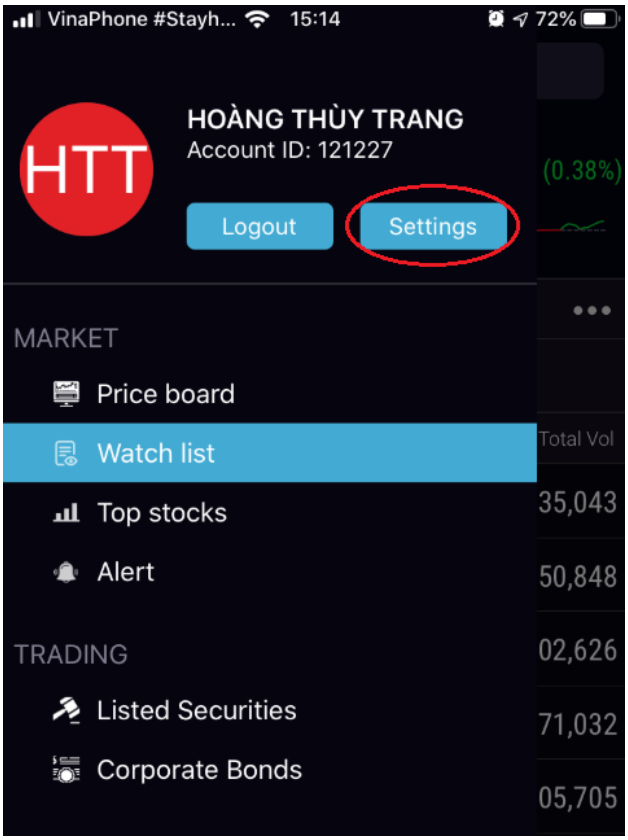


- Step 5: To stop/edit/delete alert, you can click on that alert and choosing the corresponding button

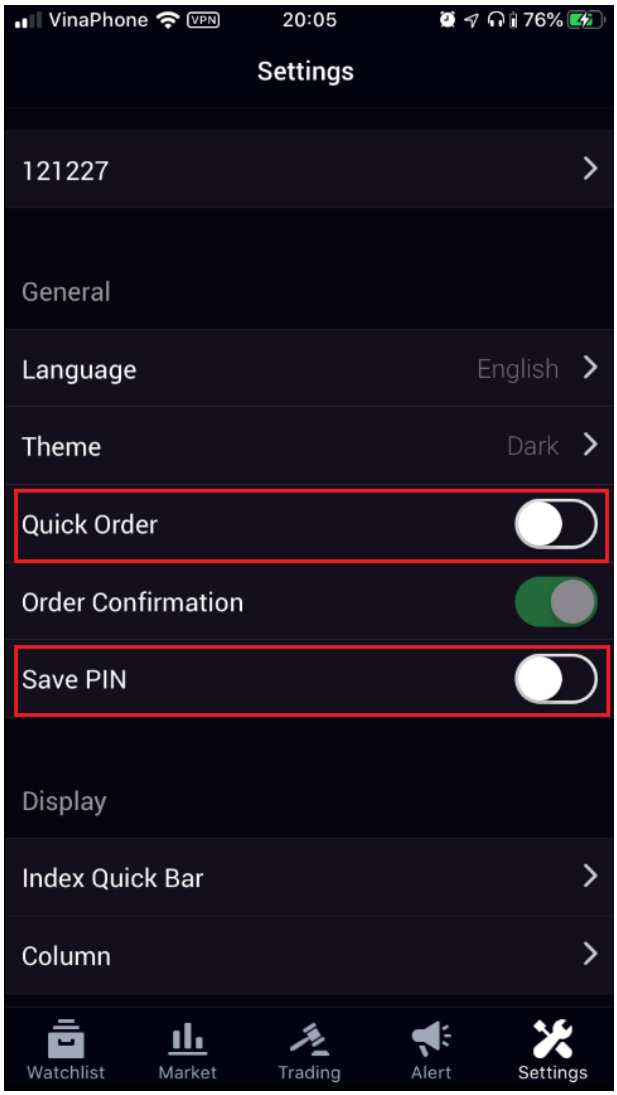


2. Setting Quick order and Save PIN

- Step 1: Click Settings

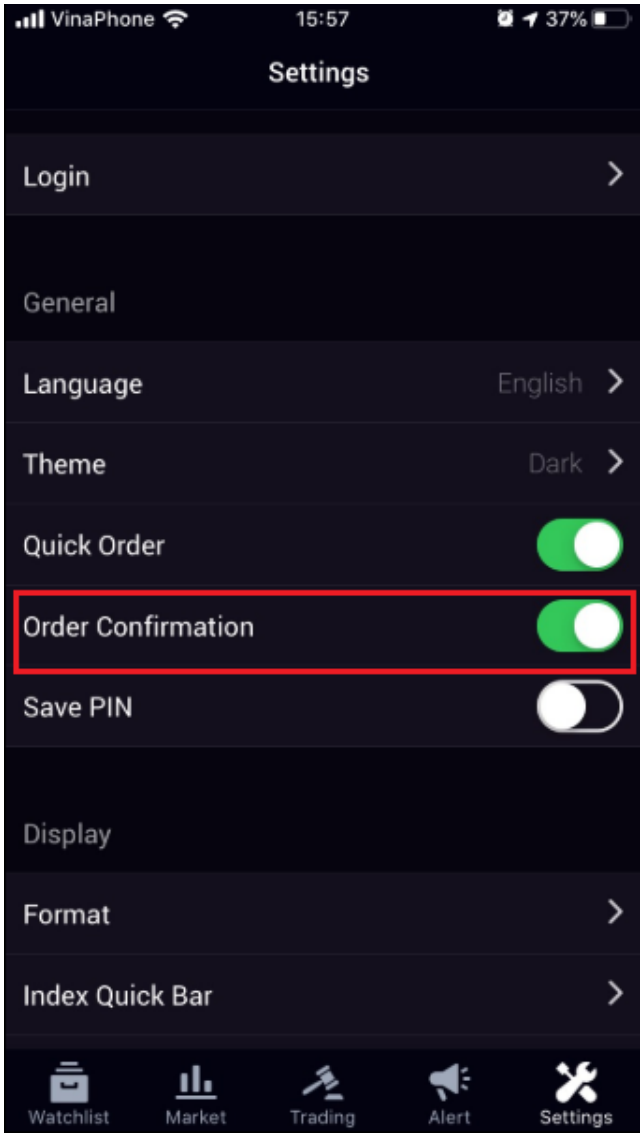


- Step 2: Choose Quick order or Save PIN depending on your need
  - Quick order: If you click Buy/Sell from watchlist/price board, system will link to Quick order screen (if quick order is off, you will be link to normal order ticket)
  - Save PIN: If Save PIN is On, you have to enter PIN once, then when you place order, you do not have to enter PIN again in this session



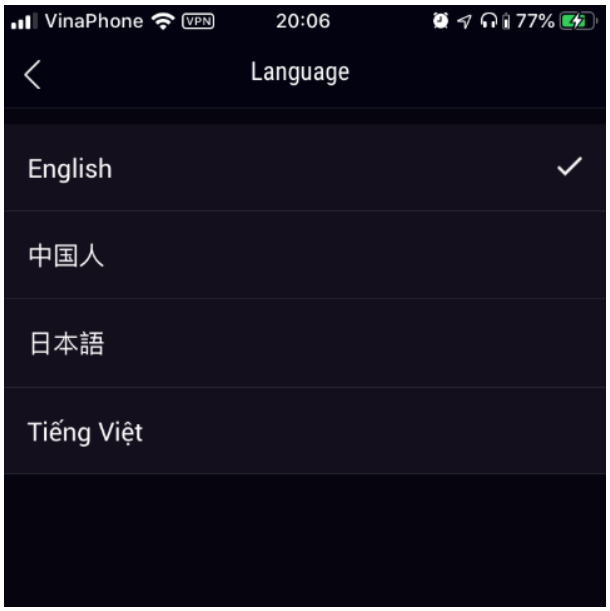
3. Setting Order confirmation mode

- Step 1: Click Setting
- Step 2: Turn on/off order confirmation mode (depend on your need)
    - Turn on order confirmation mode: you will need to click confirm before sending order
    - Turn off order confirmation mode: you do not need to click confirm order when you place order

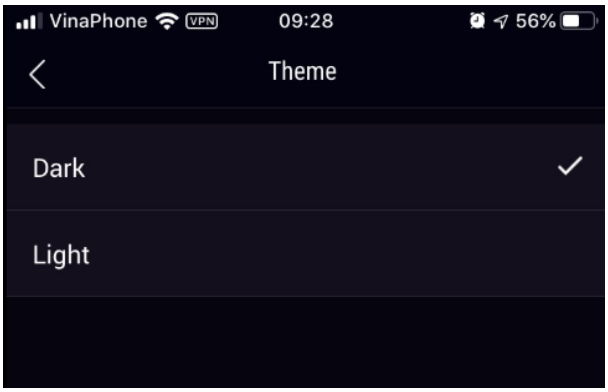


4. Setting Language, Layout, Display

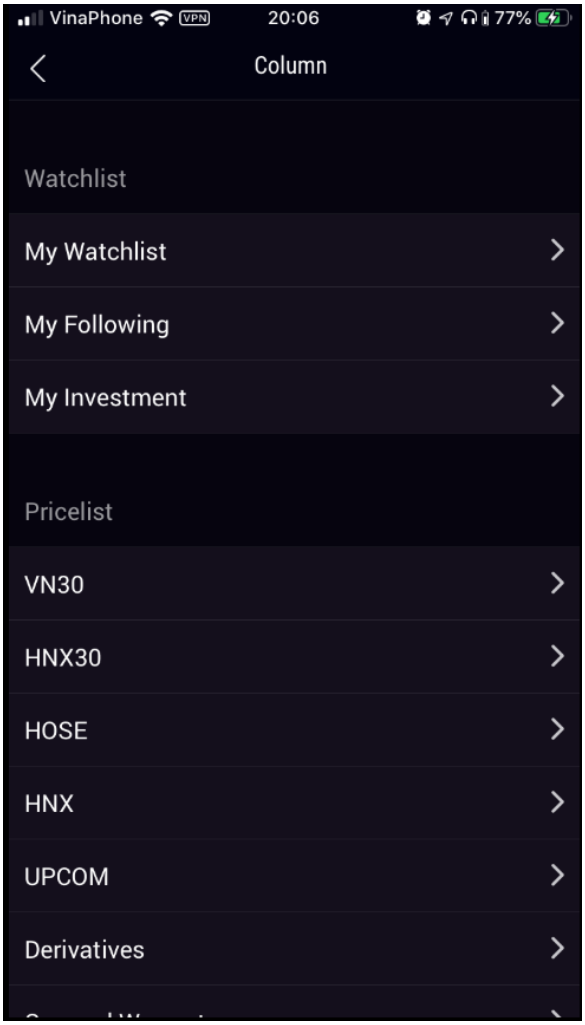
- Step 1: Click Setting
- Step 2: Setting Language, Theme, Display (include Index quick bar and column) depending on your need
- Setting Language



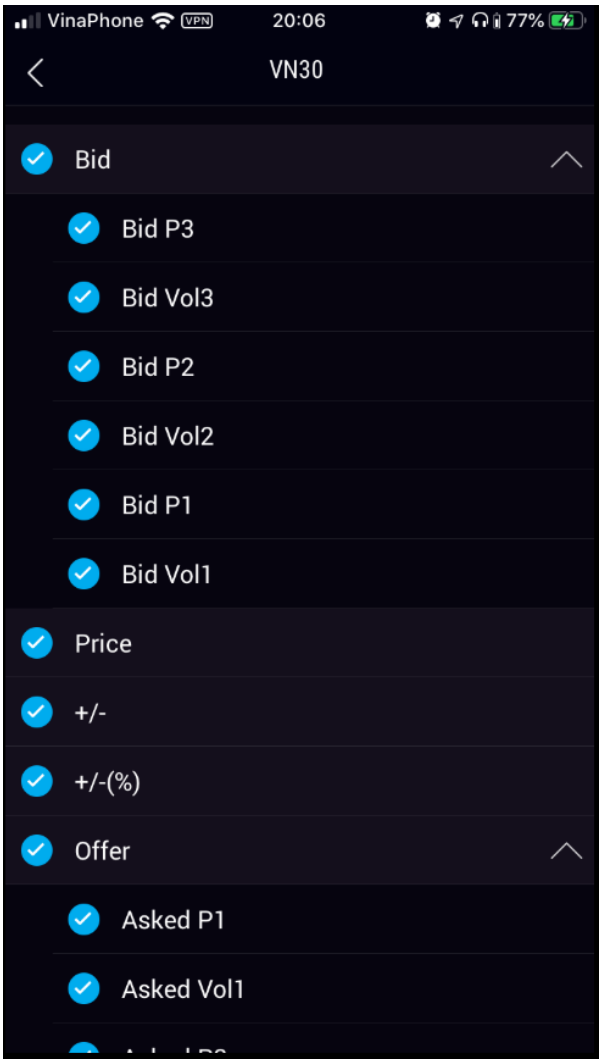
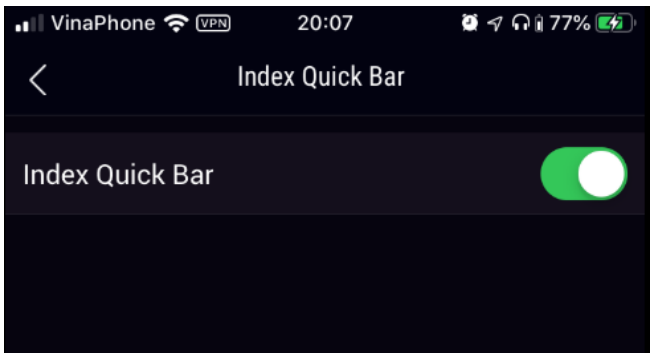
- Setting Theme



- Setting Column:
  - Step 1: Select exchange



- Step 2: Select columns you want to display



- Setting Index quick bar: