

Tutorial on POEMS

A quick and simple guide on how to get started on investing in Amundi funds on the POEMS platform

Brought to you by MoneyOwl and Philips Capital

28 Nov 2024

Content

Step 1: Open a POEMS account

Step 2: Top-up funds

Step 3: Find and invest in Amundi funds

Step 1: Open a POEMS account

How to open a POEMS account

Get Started

Click on the button below to get to the **Account Opening page** for POEMS account.

[OPEN POEMS ACCOUNT](#)

Step 1: Choose Account Type

Select the **Cash Plus Account**, if you are not intending to link your CDP account.



Cash Plus Account

Low Cost Trading

- Low brokerage for over 11 markets
- 0% Unit Trust sales charge
- No custody fee ⓘ
- Fund cash or securities prior to trading
- Trade up to 3.5x of your cash deposit ⓘ

[Learn More](#)

[Infosheet](#)



Cash Management Account

Link to CDP

- Contra
- 0% Unit Trust sales charge

Your CDP Account No. ⓘ

1681

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Don't have a CDP account? Click [here](#) to open one

[Learn More](#)

[Infosheet](#)

Select the facilities you wish to have access to.

Recommended to select the **Trading Facilities option**, which is enough for the purpose of purchasing the Amundi Index Funds.

Step 2: Choose Facilities



Trading Facilities

Trade online through our suite of POEMS platforms, POEMS 2.0, POEMS Pro, POEMS Mobile 3 or through your trading representative.

[Learn More](#)



Multi-Currency Facility

If you do not opt-in for Multi-Currency Facility, all trades will be settled in the chosen currency followed by SGD on the same day, prevailing exchange rates apply.

[Learn More](#)



Excess Funds Management Facility (SMART Park)

Phillip SMART Park is an Excess Fund Management Facility that invests and manages your Idle Cash automatically, at discretion. Make your money work HARDER and SMARTER at:
Return (7 Day) Annualised*: SGD 2.9837% p.a.* | USD 4.1601% p.a.*

Rates updated as of 25 November 2024
*Based on the average rate of annualised returns over the last rolling week.
Past performance is not necessarily indicative of future performance. View disclaimer

[Learn More](#)



Securities Borrowing and Lending (SBL) Facility

- Borrow Securities for short selling

[Learn More](#)



Contracts for Difference (CFD)

- Up to 20 times leverage.
- Ability to short sell.
- Access to global equities, indices and commodities

MetaTrader 5 (MT5)

- Trade Seamlessly with One-Click Trading
- Automated Trading Functionalities
- Advanced Trading Tools & Custom Indicators

[Learn More](#)

POEMS Account Opening

How do you wish to proceed?



Sign up with **singpass**

Hassle free form filling and authentication. Only for Singaporeans, Singapore PRs and foreigners working in Singapore

5-10 mins



GO

Sign up using Online Form

Fill up the application manually

Individual Account

10-15 mins



Joint Account

10-15 mins for Main Applicant

05-10 mins for Joint Applicant



GO

Select your preferred option

Recommended to use Singpass MyInfo for a quicker sign-up process.

You may also sign up for a Joint Account.



Pre-filled Application with **singpass**

PERSONAL DETAILS

Salutation

Name

First Name

Last Name

Sex

Marital Status

Race

Residential Status

Date of Birth

Nationality / Citizenship

Complete the Application form

Provide your personal details, financial, tax resident information and CKA acknowledgements.



Your **Cash Plus Account** is Ready!


Email Notification

Once submitted, you will be given a 7-digit Account number and you can set your password for the new account.

You will also receive an email once your account is ready.

Your Account Number of 7 digits will also be provided to you.
(E.g. 1234567)

Account Setup



Account No

Password

Login

[Forgot Password](#)

No POEMS account?

Open an account

You will be prompted to set up POEMS Digital Token as Two-Factor Authentication (2FA) to provide additional layer of security for your account.

Note to use your 7-digit account number for your login.

Login to **POEMS Mobile 3 App**
& redeem your rewards with our daily tasks



[Find out more](#)

Mobile App

Download and install the POEMS Mobile 3 App for your Digital Token and quick access to your investments.

Step 2: Top up funds

How to top-up your funds using PayNow

Choose a method to top up

There are many ways to transfer funds from your bank account.
The fastest and easiest method will be to use
PayNow/ PayLah!/ PayAnyone/ GooglePlay

Method is available for nine participating banks: UOB, Bank of China, Citibank, DBS Bank/POSB, HSBC, ICBC, Maybank, OCBC and Standard Chartered Bank.

For the full list of payment options, refer to POEMS by clicking on the button below.

Payment Instruction on POEMS

For PayNow/PayLah!/PayAnyone/GooglePlay



Scan QR Code to make payment

1. Login to your banking app
2. Scan the QR Code

Pay to
PHILLIP SECURITIES PTE LTD
UEN • 197501035Z

0.00 SGD

Daily limit remaining

Reference number

From
360 Account
XXX-XXXXX

[Change](#)

[Show available balance](#)

3. Enter your 7-digit trading account number e.g. 0123456 under the Reference number.

Desktop Platform - POEMS 2.0

The screenshot shows the POEMS 2.0 desktop platform interface. The top navigation bar includes 'Announcement 20', 'Acct Mgmt', 'Order Status', 'Prices (LP1)', 'Trade (LP2)', and 'US (Asian Hours)'. Below this, there are tabs for 'Stocks', 'Options', 'CFD', 'Unit Trust', 'Regular Savings Plan (RSP)', 'SBL', 'e-Statements', and 'Deposit Fund'. The left sidebar contains a 'CATEGORY' menu with items like 'Outstanding Positions', 'Account Details', 'Scrip Positions', 'Scrap Book', 'Live Positions beta', 'Live Cash Balance', 'Calculator', 'What's New', 'Account Details new', 'Transactions History new', 'Corporate Actions', and 'Online Forms'. The 'Live Cash Balance' item in the sidebar is highlighted with an orange box. The main content area shows the 'Live Cash Balance' section with a sub-section 'Buying Power' containing two rows of 'Available Cash (with margin) SGD equivalent' and 'Available Cash (without margin) SGD equivalent', both valued at 100.00. Below this is the 'Cash Balance (Live)' section, which includes a note '(before the settlement of the outstanding contract and accrued interest, if any)' and a row for 'SGD' valued at 100.00. An orange circle highlights the 'Live Cash Balance' section header, and an orange arrow points from this circle to the 'Live Cash Balance' item in the sidebar.

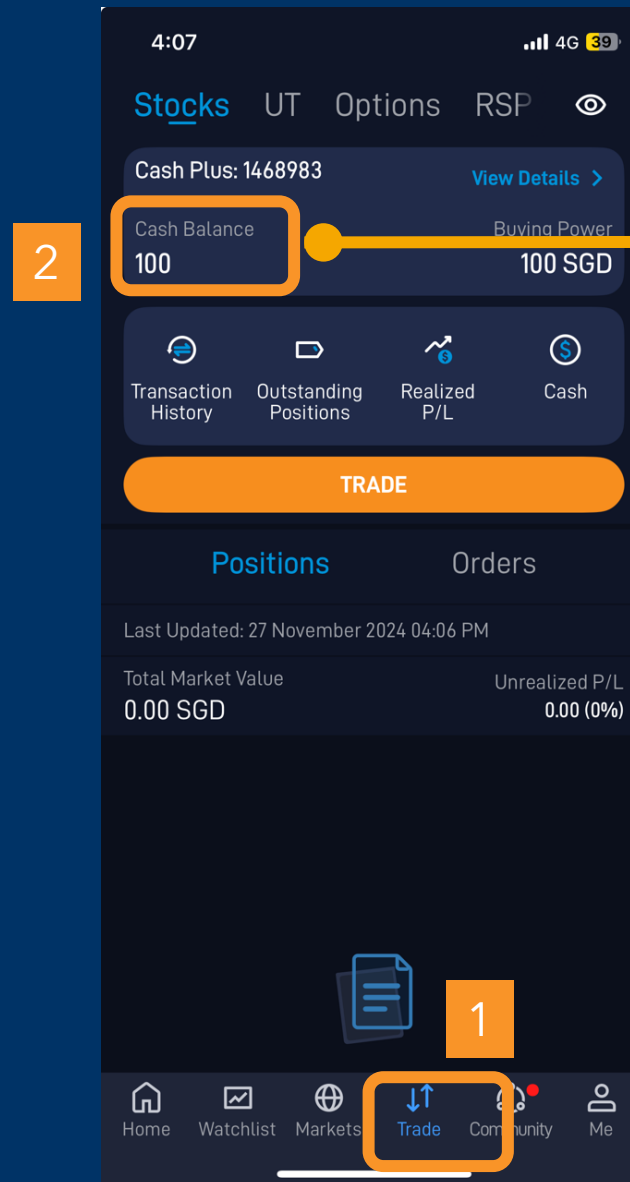
Check Cash Balance

Transfer of funds will take a while, depending on the mode of payment.

For eNets, PayNow/ PayLah!/ PayAnyone/ GooglePlay, the funds will be available for use within 15 minutes after bank transfer.

1. Login to check your cash balance
2. Click on "Acct Mgmt" → "Live Cash Balance"

POEMS 3.0 Mobile App



Check Cash Balance

Transfer of funds will take a while, depending on the mode of payment.

For eNets, PayNow/ PayLah!/ PayAnyone/ GooglePlay, the funds will be available for use within 15 minutes after bank transfer.

1. Login to check your cash balance.
2. Select Trade and view your Cash Plus account balance.

Step 3: Amundi Index Funds on POEMS platform

How to find and invest in Amundi Index Funds

Desktop Platform - POEMS 2.0

The screenshot shows the POEMS 2.0 desktop platform interface. The top navigation bar includes: Announcement 20, Acct Mgmt, Order Status, Prices (LP1), Trade (LP2) (highlighted with an orange box and number 1), US (Asian Hours), News & Research, Charts, Tools, and Market Data. Below this is a sub-menu with: Watchlist, Stocks, Options, CFD, ETF, DLC, SBL, SGX Unit Share, Unit Trust (highlighted with an orange box and number 2), Restricted Funds, Bonds, and Fractional. A search bar with a magnifying glass icon and the text "Search Name" is highlighted with an orange box and number 3. The main content area displays a table of "Top 20 performing funds" with columns: Fund Name, Curr, Asset, RSP, Ind. Bid (NAV), 1 Yr Ann. Return %, and 3 Yr Ann. Return %. The table lists various funds such as LionGlobal India Fd A SGD, FTGF Royce US Smaller Companies Fd A Acc USD, and others. Below the table is an "Order Status" section with dropdowns for "Today's Orders" and "All Orders", and buttons for "Withdraw", "Amend", and "Refresh". A search bar for "Search Name / Symbol" is also present. The text "There are no orders to be listed" is displayed in the center.

Platform Navigation

1. Select "Trade (LP2)" on the top menu
2. Select "Unit Trust"
3. Click on the "Search" Icon for Advanced Search
4. Alternatively, you can search Amundi funds by Fund Manager

Desktop Platform - POEMS 2.0

Platform Navigation

1. Select "Unit Trust"
2. Search for "Amundi Index"
3. Select all 3 funds
4. Add to "Watchlist"

Your watchlist will now have the 3 funds you selected.

Advanced Search

Product

Select/Deselect All

Stocks ETF CFD CFD-DMA **Unit Trust** Bonds

To view/search Bonds Product, please click [here](#).

Exchange

Select/Deselect All

SGX SET NYSE Nasdaq AMEX Bursa

LSE HKEx TSE IDX ASX SSE-A

SZSE-A INDX FX (CFD) FWB World Indices HK Pre-IPO

TSX

Search Name / Symbol : Page Size:

<input type="checkbox"/>	Change	Symbol	Name
<input checked="" type="checkbox"/>		565002	Amundi Index Global Aggregate Bond A...
<input checked="" type="checkbox"/>		565003	Amundi Index MSCI Emerging Markets ...
<input checked="" type="checkbox"/>		565001	Amundi Index MSCI World A12S (C) SGD

Page: 1 of 1 | << >> | Refresh

Displaying 1 - 3 of 3

Desktop Platform - POEMS 2.0

Placing Orders


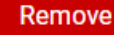

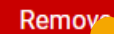


The screenshot displays the POEMS 2.0 desktop interface. At the top, there are market indices: ChiNext: 2208.781 (+58.684), SZSE 100: 4704.673 (+99.142), SZSE Comp: 10566.101 (+232.876), and * HSCEI: 7027.400 (+175.840). The time is 04:25:57 PM. The main navigation bar includes: Announcement (20), Acct Mgmt, Order Status, Prices (LP1), Trade (LP2), US (Asian Hours), News & Research, Charts, Tools, Market Data & Rewards, and Technical View. Below this is a 'View Price' section with tabs for Watchlist, Stocks, Options, CFD, ETF, DLC, SBL, SGX Unit Share, Unit Trust, Restricted Funds, Bonds, and Fractional. A filter bar includes Fund Manager, Asset Class, Geographica, Sector/Strategy, Investment Type, and Currency. A table lists funds with columns for Fund Name, Currency, Asset Class, etc. The 'Amundi Index MSCI World A12S (C) SGD' fund is highlighted. To the right, the 'Trade' section shows the fund's current price (188) and a form for placing an order. The form includes fields for Investment Amount (100.00), Payment Currency (SGD), and Fund Source (CASH). At the bottom, there are buttons for BUY and ADD TO BASKET. Three orange callouts with numbers 1, 2, and 3 point to the fund list, the investment amount field, and the BUY/ADD TO BASKET buttons respectively.


Fund Name	Curr	Asset Class	Li	Yes	Ind. Div (Yr)	YTD Ann. Return %	3 YTD Ann. Return %
Amundi Index Global Aggregate Bond A12HS (C) SGD	SGD	Fixed I...	Yes	130.9000	5.3097		
Amundi Index MSCI Emerging Markets A12S (C) SGD	SGD	Equities	Yes	144.4700	14.5042		
Amundi Index MSCI World A12S (C) SGD	SGD	Equities	Yes	188.0000	28.0218		

1. Click on the funds one by one to add them to the basket
2. Indicate the investment amount you like to invest for each funds
3. Ensure you have enough Cash balance before adding to the Basket

Desktop Platform - POEMS 2.0

UT Basket (3) ✕

Fund	Investment Amount	Fund Source	Dividend	Sales Charge	
 Amundi Index Global Aggregate Bond A12HS (C) SGD	<input type="text" value="100.00"/>	<input type="text" value="SGD"/> ▼	<input type="text" value="CASH"/> ▼	<input type="text" value="Reinvest"/> ▼	<input type="text" value="0.00%"/> 
 Amundi Index MSCI Emerging Markets A12S (C) SGD	<input type="text" value="100.00"/>	<input type="text" value="SGD"/> ▼	<input type="text" value="CASH"/> ▼	<input type="text" value="Reinvest"/> ▼	<input type="text" value="0.00%"/> 
 Amundi Index MSCI World A12S (C) SGD	<input type="text" value="100.00"/>	<input type="text" value="SGD"/> ▼	<input type="text" value="CASH"/> ▼	<input type="text" value="Reinvest"/> ▼	<input type="text" value="0.00%"/> 

 **1** **2**

Placing Orders

1. Ensure you have enough available cash in your account
2. Once ready, click on "Checkout" button to preview your orders

Desktop Platform - POEMS 2.0


Preview Orders

1. Check the declaration fields
2. Key in your password

UT Basket (1)

← Back

Preview Basket Orders

Name	Investment Amount	Payment Currency	Fund Source	Dividend Option	Sales Charge
 <u>Amundi Index MSCI World A12S (C) SGD</u>	100.00	SGD	CASH	Reinvest	0.00%
Subtotal (SGD):		100.00			

NOTICE : Units are priced on forward basis. Issue price cannot be calculated at the time of application.

Client's Declaration

I declare that I would like to receive

- No Financial Advice
I am aware that all investment products involve risk and I should seek advice from a licensed or exempt financial adviser before investing in any investment product. I should consider whether the investment product in question is suitable for me. I would be waiving my rights under the Financial Advisers Act if I choose to invest in investment products without receiving advice. I will have to assess the product(s) myself and consider the product suitability with reference to my own financial objective(s), particular needs and risk preference to decide on the investment.
- Send me email of order confirmation upon submission
- I agree that I read and understand the Client's Declaration, [Disclaimer](#) and the [Terms and Conditions](#) governing Phillip Securities Unit Trust Investment Accounts and the prospectus of the above fund before you can proceed on for the investment.

1

Password

2

Avail. Cash: 100 SGD

Submit

Desktop Platform - POEMS 2.0

Order Status

Your trading order will appear under the "Order Status".

The screenshot shows the POEMS 2.0 desktop platform interface. The top navigation bar includes tabs for Announcement, Acct Mgmt, Order Status, Prices (LP1), Trade (LP2), US (Asian Hours), News & Research, Charts, Tools, and Market Data & Rewards. The 'Order Status' tab is selected. Below the navigation bar, there are filters for Fund Info, Fund Manager, Asset Class, Geographica, Sector/Strategy, Investment Type, and Currency. The main content area displays a table of funds with columns for Fund Name, Curr, Asset, EIP, RSP, Ind. Bid (NAV), 1 Yr Ann. Return %, and 3 Yr Ann. Return %. The 'Order Status' section at the bottom shows a table of orders with columns for Product, Market, Name, Status, Order Type, Action, Submitted, Total Executed, Remaining, and Submitted Date/Time. One order is highlighted with an orange box: 'Amundi Index MSCI World A12S (C) SGD' with status 'Received' and action 'BUY'.

Product	Market	Name	Status	Order Type	Action	Submitted	Total Executed	Remaining	Submitted Date/Time
UT	UT	Amundi Index MSCI World A12S (C) SGD	Received	BUY		Nov 27 2024 4:36:00 PM			

Desktop Platform - POEMS 2.0

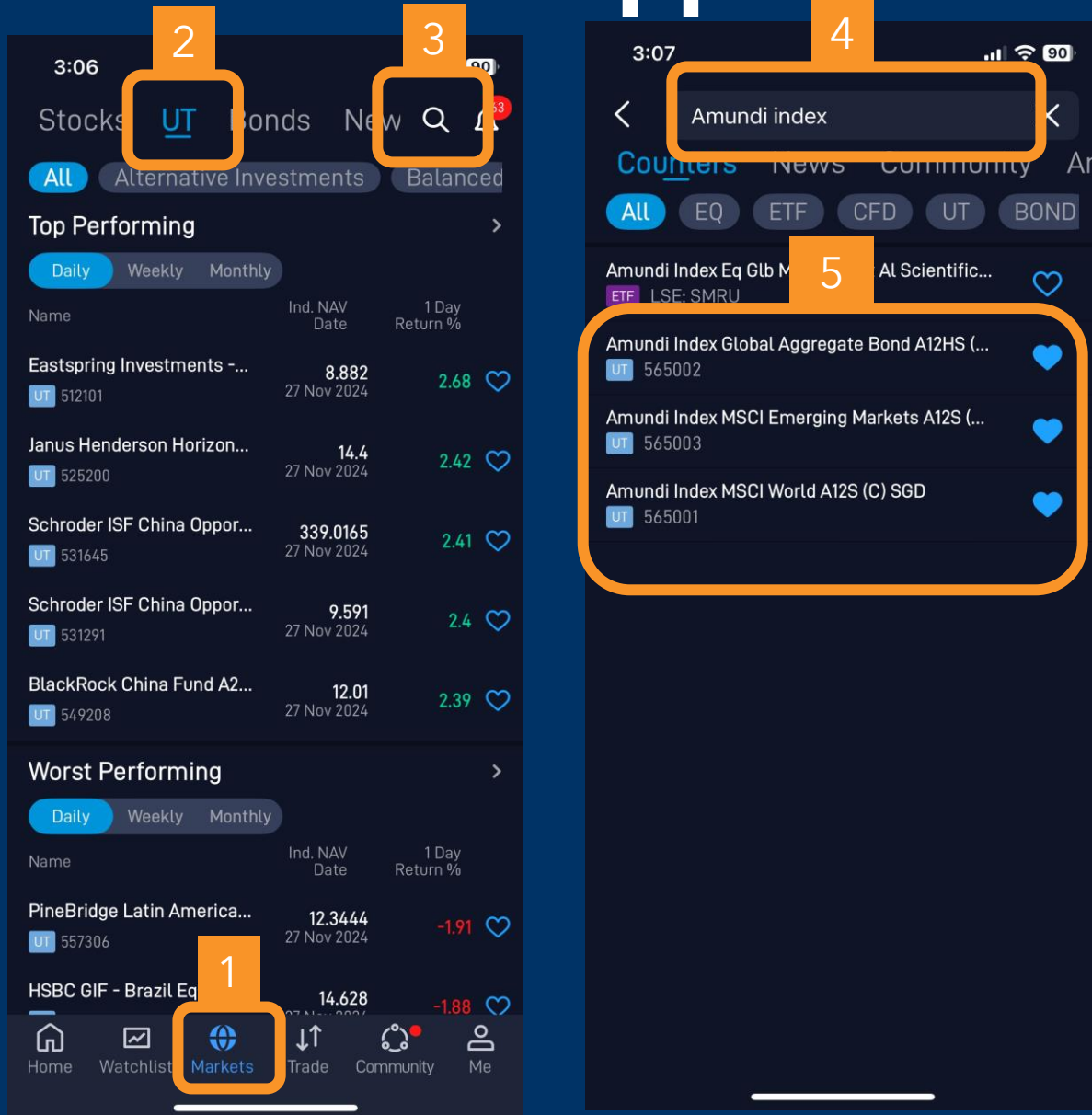
Holdings

Once the trades are settled, you can view your holdings by clicking on

1. "Acct Mgmt" → "Unit Trust"
2. "Holdings"

The screenshot displays the POEMS 2.0 desktop platform interface. At the top, there is a navigation bar with account information (225: 38134.970 (-307.030)), market data (ASX All Ords: 8659.600 (+47.000), STI: 3707.200 (-5.190), * Hang Seng: 19603.130 (+443.930), ChiNext: 2208.), and user options (Alerts, My Settings, Logout). Below this is a secondary navigation bar with tabs for various services like Stocks, Options, CFD, Unit Trust, Regular Savings Plan (RSP), SBL, e-Statements, and Deposit Fund. The left sidebar contains a list of navigation options: Announcements, Acct Mgmt, Order Status, Prices (LP1), Trade (LP2), US (Asian Hours), News & Research, Charts, Tools, Market Data & Rewards, Technical View, Holdings, Outstanding Payments, Settled Positions, Transaction History, and Transfer-In. The main content area is titled 'Unit Trust Holdings' and shows a table with columns: Fund Name, Fund Source, Units, Currency, Average Price, Indicative Price, Cost, Market Value, Unrealised Profit/Loss, Profit/Loss (%), Dividend Option, Actions, and RSP. The table currently displays 'No Record Is Available'. Two orange callout boxes with numbers 1 and 2 highlight the 'Acct Mgmt' and 'Holdings' menu items respectively.

Mobile App – POEMS 3.0

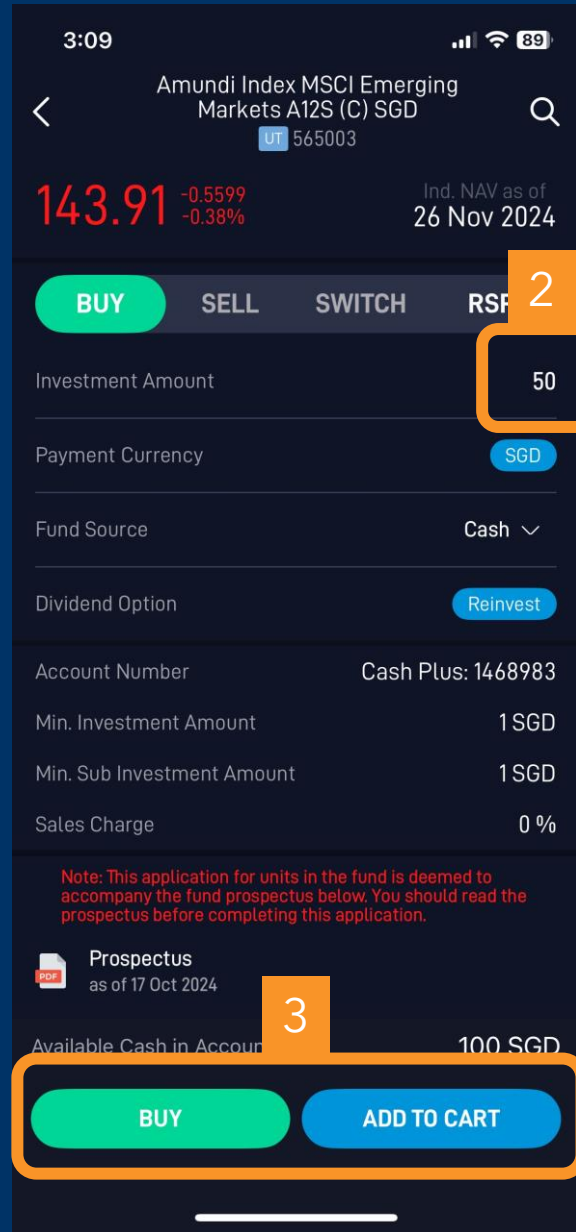
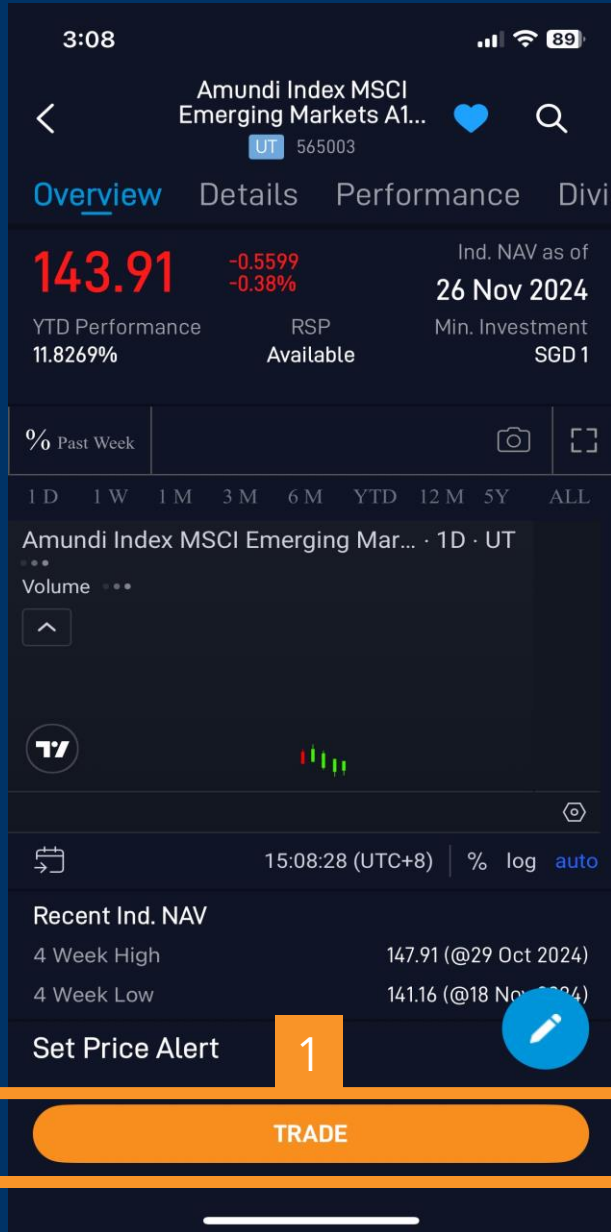


Finding Amund Index Funds

To locate the funds,

1. select "Markets"
2. select "UT"
3. select "Search" button
4. input "Amundi Index"
5. bookmark the funds to your wish list
6. click on "Buy or Add" to "Cart"

Mobile App – POEMS 3.0

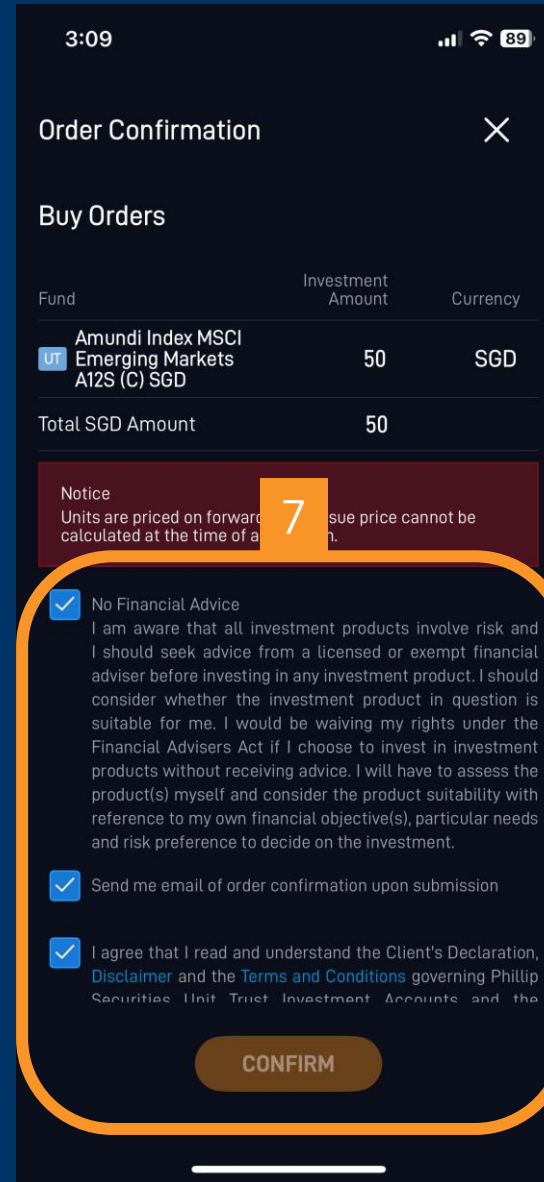
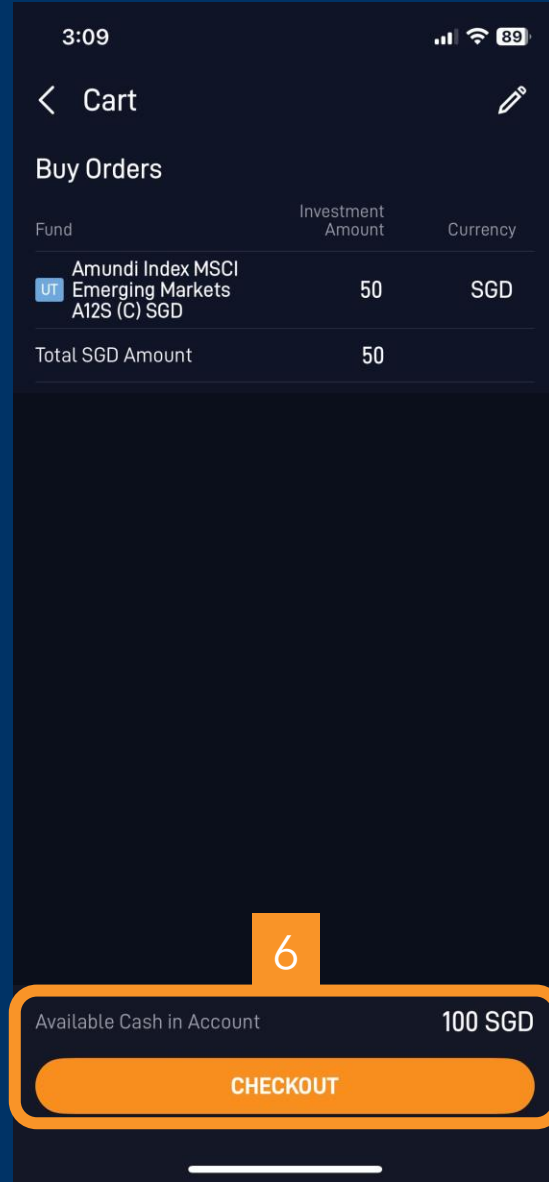
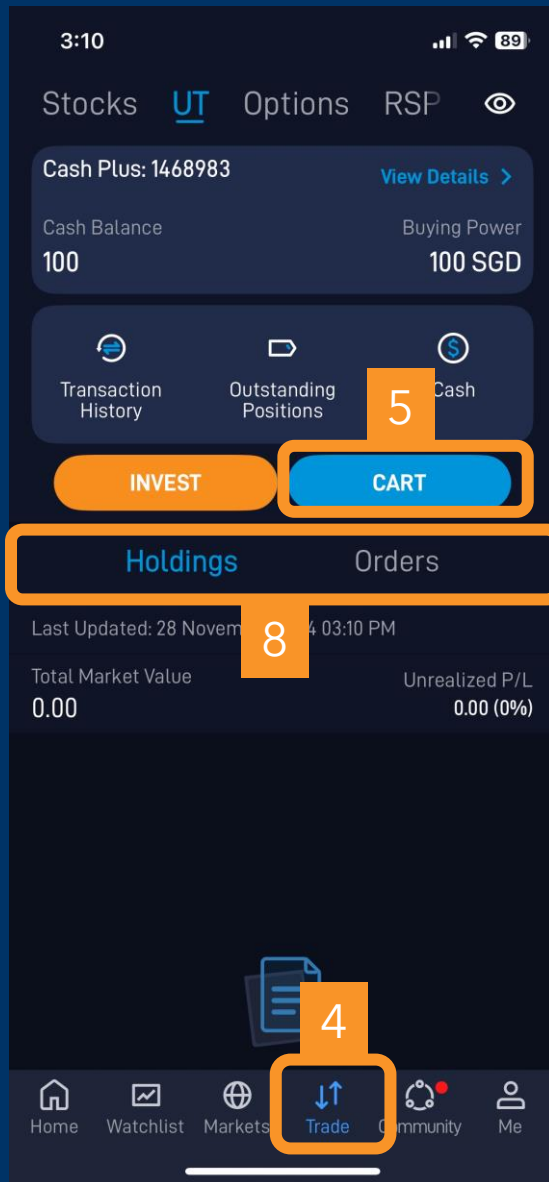


Placing Orders

To purchase the fund,

1. select "Trade"
2. input the investment amount
3. click on "Buy or Add" to "Cart"

Mobile App – POEMS 3.0



Placing Orders

To purchase the fund,

4. select "Trade"
5. select "Cart"
6. select "Checkout"
7. check and confirm the order purchase
8. select "Holdings" and "Orders" to view portfolio and order statuses

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