

Portal2

Browser-Based
Trading Platform
User Manual

2023

Contents

| | |
|------------------------------------|----|
| 1. Before You Start | 3 |
| 2. Log In | 4 |
| 3. Landing Page..... | 7 |
| 4. Trade..... | 9 |
| 4.1 Shortlist..... | 10 |
| 4.2 Single Price Quote | 10 |
| 4.3 Order & Position Overview..... | 12 |
| 4.4 Order placing | 12 |
| 5. Account Overview | 13 |
| 6. Fund..... | 14 |
| 6.1 Fund Deposit..... | 14 |
| 6.2 Fund withdrawal..... | 15 |
| 6.3 Currency Exchange (FX) | 16 |
| 6.4 Fund History | 16 |
| 7. Order History | 17 |
| 8. IPO | 17 |
| 9. System Notifications..... | 18 |
| 10. Help..... | 19 |
| 11. Setting..... | 20 |

1. Before You Start

Portal2 is a new generation of multi-functional securities trading web platform developed by 2GoTrade. In addition to securities trading, it also provides functions such as account inquiry, IPO subscription, fund deposit and withdrawal, etc. Please note the following important information:

- Depending on the Hong Kong equities and indexes license withheld by your brokerage, or the Hong Kong equities market quotation plan you are subscribing, the Hong Kong equities index and/or single security quotations in this application will be displayed in real time/delayed or hidden.
- The general system settings of your brokerage firm may also make some functions in this manual unavailable.
- Portal2 does not support running on Internet Explorer (IE). It is recommended to use the latest versions of Google Chrome, Firefox, Microsoft Edge and Safari browsers.
- Portal2 supports the use of mainstream tablets. It is recommended to use tablets with a resolution of 1024 × 768 or above to obtain the best display effect.

For details, please contact your brokerage support hotline (852) 2287 9178
/ email to cs@corecapital.com.hk.

Disclaimer

2GoTrade Limited has used best effort to ensure the accuracy and reliability of the information provided in this manual, but cannot guarantee its absolute accuracy and reliability, and will not be liable for any loss or damage caused by any inaccuracies or omissions.

In case of any discrepancies of meaning between Chinese and English version of this manual, Chinese version shall prevail.

2. Log In

- Use a browser to open the URL provided by your broker
- Enter your login ID and password, click to check "I have read and agree <disclaimer>", and then click <Login> to proceed.
- Click the language menu at bottom to switch among "Traditional Chinese", "Simplified Chinese" or "English"

2-Factor Authentication (2FA)

- Please select the corresponding button and press <Confirm> to choose to receive a one-time password (OTP) via SMS or mobile security code to complete the two-factor authentication (Fig. 1).
- By SMS:
 - Your registered mobile phone number will receive a SMS with six-digit OTP. Please enter it on the login page and click <OK> (Fig.2)

Verification code

Please select a verification method

☒ SMS one-time password (OTP)

☐ Mobile Security Password

Tips
The selected authentication method will be used as the default login option for the next time

OK

< Back

Verification code

Sent to 85-12345678

Verification code

MYEJ-123456 [RESEND\(35\)](#)

Mobile Security Password

OK


Fig. 1

Fig. 2

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- Mobile Security Key (soft token, **RECOMMENDED!**)

- Open GoTrade2 APP on your mobile

phone. Press  at bottom (Fig. 3).

- A six-digit OTP will be generated in the APP next page (Fig.4).

- Please enter it on Portal2 2FA page and click <OK> (Fig.5).

- If you have not enabled this feature, please refer to left section of Fig. 5 to use the GoTrade2 APP to complete the activation process.

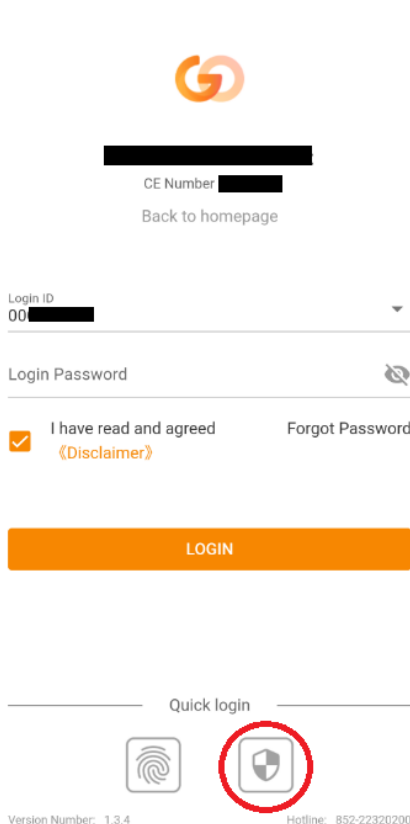


Fig. 3

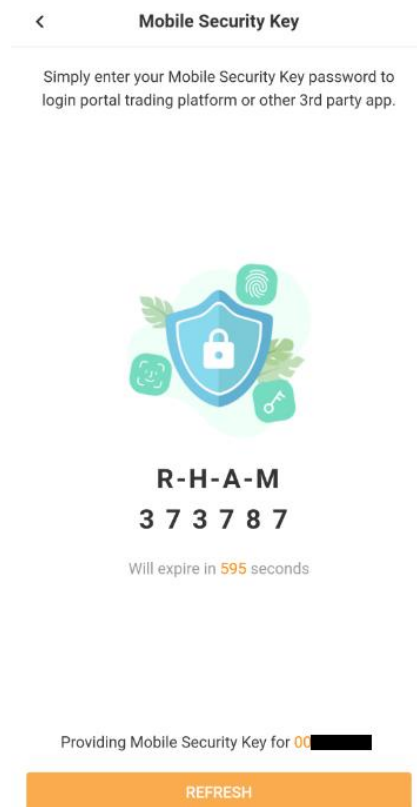


Fig. 4

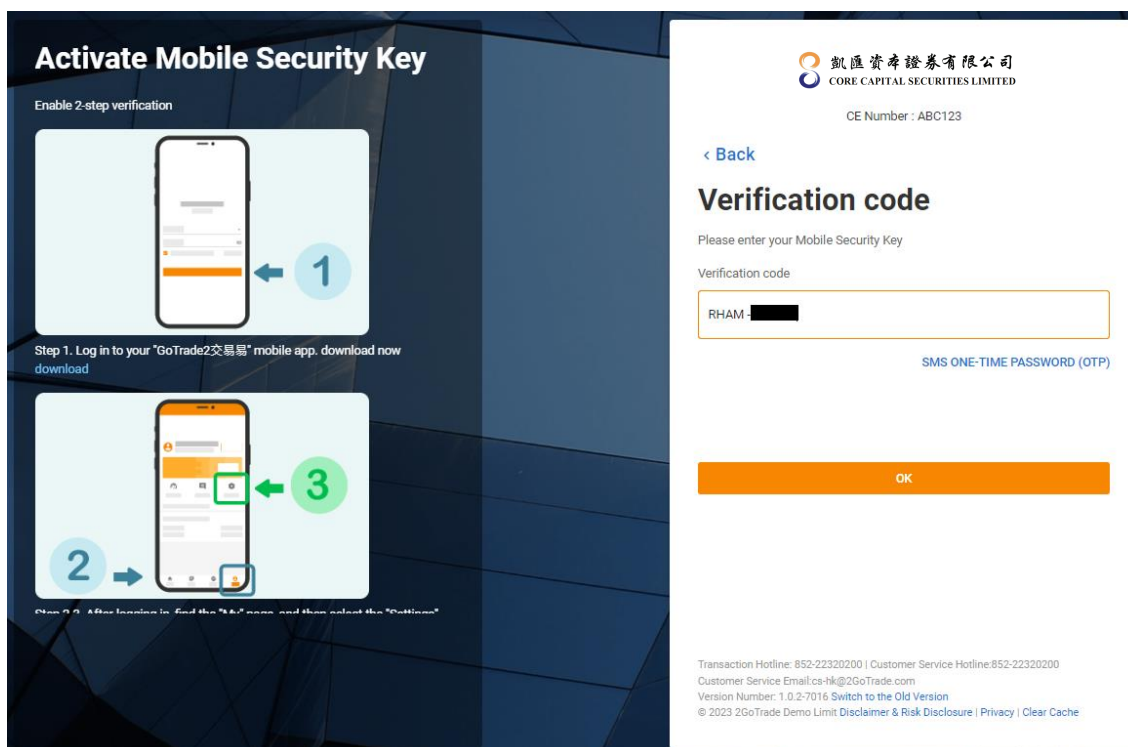


Fig. 5

Forget password

- Press <Forget Password> button on the login page
- Enter login ID and verification method (support mobile phone number or email) on the next page, and then click <OK> (Fig. 6)
- System will issue a 6-digit OTP. Please follow the instructions to enter the verification code and new password twice. Click <Submit> to complete the password reset (Fig. 7).

Forgot Password

Login ID
000 [REDACTED] ✕

Verification method
Mobile number ▼

Area
+852 Hong Kong ▼

Mobile number
[REDACTED] ✕

OK

Forgot Password

Please input verification code
ZHNX: [REDACTED] RESEND(35)

Sent to 85296***465

Set new password
New password
[REDACTED] ✕ [REDACTED]

Re-enter new password
[REDACTED] ✕ [REDACTED]

- ✓ 8-20 characters including letters, numbers or the accepted symbols: @#\$%^&*?
- ✓ Contains an uppercase and lowercase letter
- ✓ Contains a number

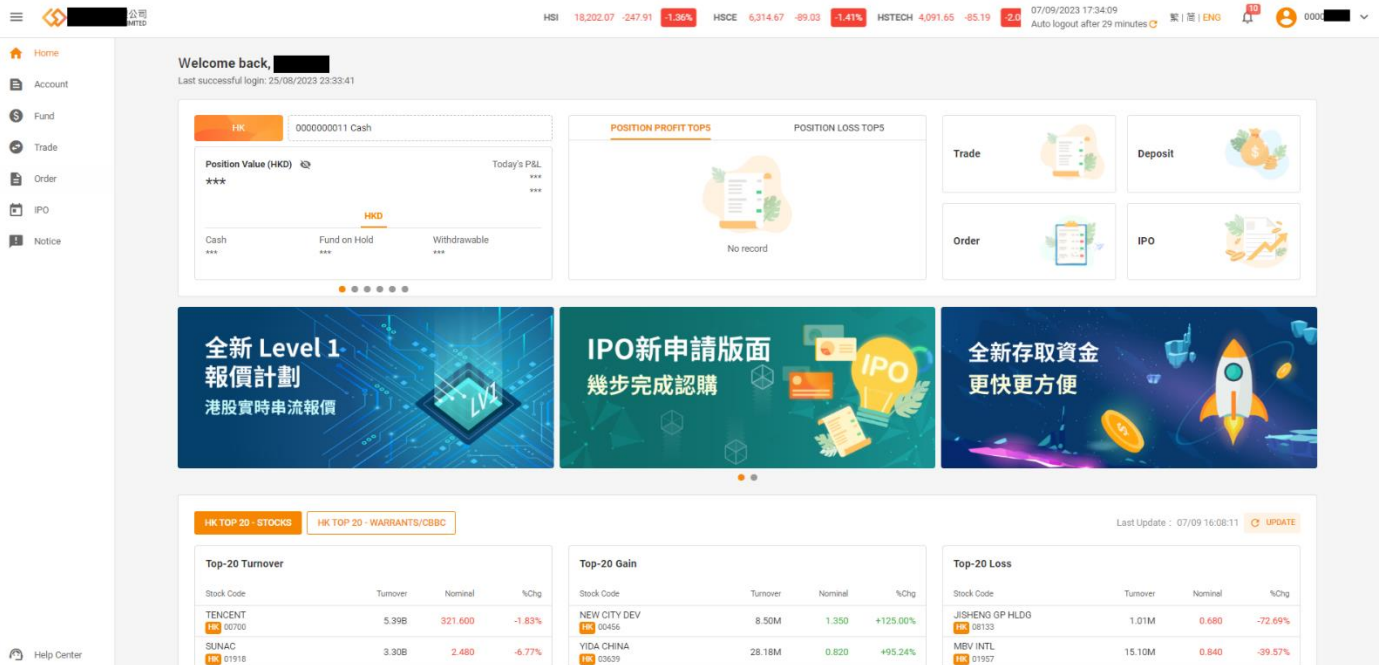
SUBMIT

Fig. 6

Fig. 7

3. Landing Page

After successfully logging in, you will be redirected to the home page, with different sections displaying various functions.



The screenshot shows the landing page of the Portal2 Browser-Based Trading Platform. The top navigation bar includes the company logo, user name, and market indexes (HSI, HSCE, HSTECH) with their current values and percentage changes. The main content area is divided into several sections:



- Welcome back, [User Name]**: A personalized greeting with the last successful login time.
- Position Value (HKD)**: A section showing the user's current position value, cash, fund on hold, and withdrawable amount.
- POSITION PROFIT TOPS** and **POSITION LOSS TOPS**: Sections displaying the top performing and losing positions.
- Trade**, **Deposit**, **Order**, and **IPO**: Quick access buttons for various trading functions.
- 全新 Level 1 報價計劃**: A banner for the new Level 1 quotation plan.
- IPO新申請版面**: A banner for the new IPO application interface.
- 全新存取資金**: A banner for the new fund access interface.
- Top-20 Turnover**, **Top-20 Gain**, and **Top-20 Loss**: Tables showing the top-performing stocks in terms of turnover, gain, and loss.

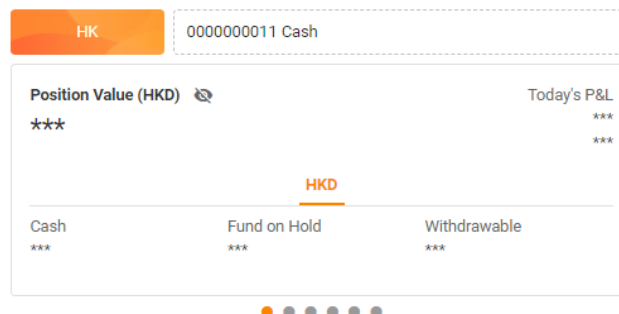
Basic Functions

| | | |
|---|---|--|
| 1 | Indexes Area – Displaying Hong Kong Market Indexes (real-time or delayed, depends on subscribed plan of user) | <div> <div>HSI</div> <div>18,096.45</div> <div>-105.62</div> <div>-0.58%</div> </div> <div> <div>HSCE</div> <div>6,298.72</div> <div>-15.95</div> <div>-0.25%</div> </div> <div> <div>HSTECH</div> <div>4,083.14</div> <div>-8.51</div> <div>-0.21%</div> </div> |
| 2 | System time & remaining time (auto logout upon idle time exceeding preset duration) | <div>11/09/2023 21:46:26</div> <div>Auto logout after 28 minutes</div> |
| 3 | Language Selection | <div> <div>繁</div> <div>簡</div> <div>ENG</div> </div> |
| 4 | Notifications – Displays system notices, order updates, fund management status, etc. (See Section 9) | <div>12</div> |
| 5 | Login ID – click it to select white/ dark mode, reset password and log out | <div>000000001</div> |
| 6 | Shortcut menu area at left – Main function buttons | |

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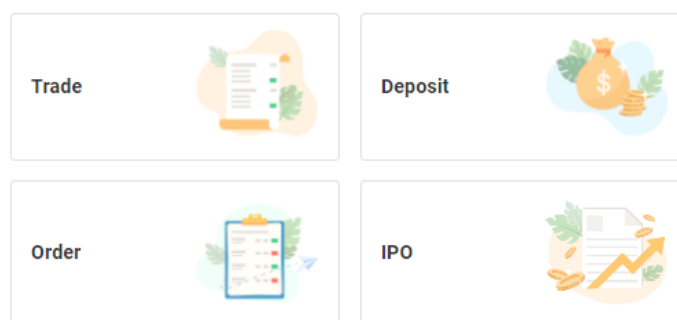
Account Overview

- Main page displays asset details for each market.
- Click  to show / hide figures.
- Click  to pop out menu to select other markets.



































Shortcut Buttons

- Click to enter Order ticket / fund deposit / order book / IPO pages



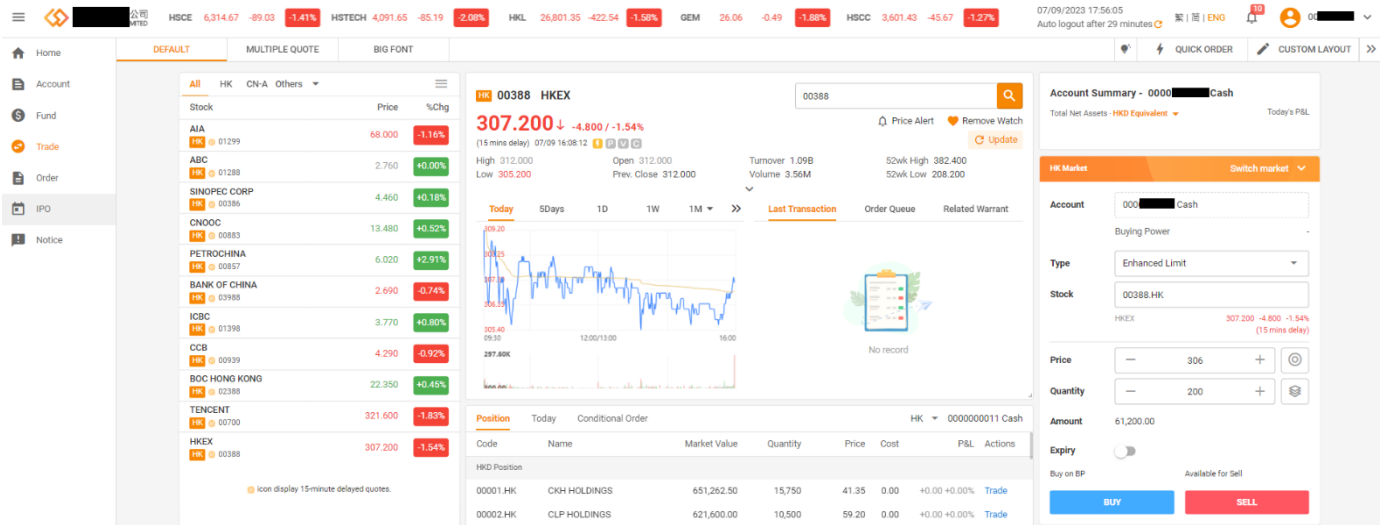
HK Top 20

- Displays top 20 trading volume, gain & loss rankings of securities, warrants/CBBCs and ETFs in HK market
- Click specific equity to jump over to detailed price quote page (See Section 4.2)
- Press  to refresh the ranking




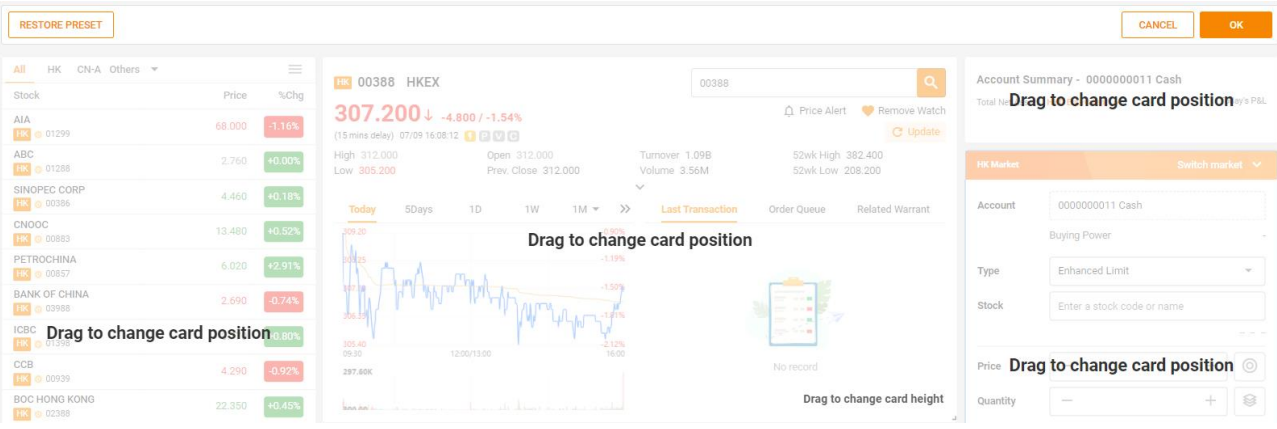
| HK TOP 20 - STOCKS | | | | HK TOP 20 - WARRANTS/CBBC | | | | Last Update : 07/09 16:08:11  | | | |
|---|----------|---------|---------|--|----------|---------|----------|--|----------|---------|---------|
| Top-20 Turnover | | | | Top-20 Gain | | | | Top-20 Loss | | | |
| Stock Code | Turnover | Nominal | %Chg | Stock Code | Turnover | Nominal | %Chg | Stock Code | Turnover | Nominal | %Chg |
| TENCENT  | 5.39B | 321.600 | -1.83% | NEW CITY DEV  | 8.50M | 1.350 | +125.00% | JISHENG GP HLDG  | 1.01M | 0.680 | -72.69% |
| SUNAC  | 3.30B | 2.480 | -6.77% | YIDA CHINA  | 28.18M | 0.820 | +95.24% | MBV INTL  | 15.10M | 0.840 | -39.57% |
| MEITUAN-W  | 3.03B | 125.000 | -2.57% | PLATT NERA  | 1.15M | 0.320 | +60.00% | HYGIEIA GROUP  | 3.59M | 0.057 | -32.14% |
| BABA-SW  | 2.39B | 90.800 | -1.57% | CHINA ENV TEC  | 11.64K | 0.520 | +40.54% | IB SETTLEMENT  | 137.94K | 0.071 | -31.73% |
| COUNTRY GARDEN  | 2.29B | 1.070 | -12.30% | UNITY ENT  | 29.49M | 0.700 | +40.00% | TATA HEALTH  | 154.81K | 0.320 | -22.89% |
| SMIC  | 2.04B | 19.820 | -7.60% | WAN LEADER  | 3.94M | 0.090 | +36.36% | GENES TECH  | 171.25K | 0.080 | -21.57% |
| CNOOC  | 1.85B | 13.480 | +0.52% | HAILAN HLDGS  | 102.87K | 4.280 | +30.09% | SLING GROUP  | 8.27K | 0.047 | -18.97% |
| AIA  | 1.75B | 68.000 | -1.16% | ASIA ENERGY LOG  | 7.21K | 0.179 | +27.86% | SHIMAO GROUP  | 136.35M | 1.010 | -18.55% |
| PING AN  | 1.48B | 47.850 | -2.45% | DOYEN INTL HOLD  | 31.88K | 0.249 | +27.69% | CHINA HUAJUN GP  | 2.86K | 1.100 | -18.52% |
| ICBC  | 1.35B | 3.770 | +0.80% | NOVA GROUP  | 183.78K | 0.014 | +27.27% | SKYFAME REALTY  | 1.28M | 0.018 | -18.18% |

Portal2 Browser-Based Trading Platform User Manual (ver 1.0)


4. Trade

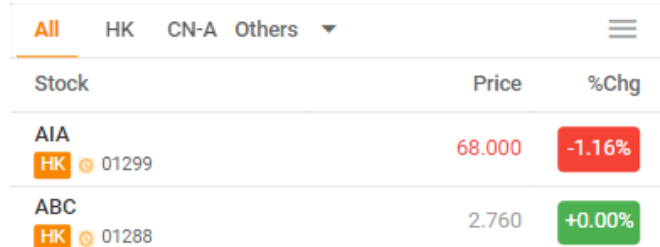


Basic Functions

| | |
|---|---|
| 1 | <p>DEFAULT MULTIPLE QUOTE BIG FONT</p> <p>Interface mode. Click “Multiple Quote” or “Big Font” to change other display mode.</p> |
| 2 | <p> Keyboard hot key – display supported shortcut keys for order placing</p> |
| 3 | <p> QUICK ORDER After clicking and enabling it, no confirmation box will pop out during order placing</p> |
| 4 | <p> CUSTOM LAYOUT After clicking, you can freely drag, arrange and resize each card on Trade page as you preferred.</p> <p>Press <OK> to save changes or <Restore Default Settings> to restore system values (as shown below).</p> <p>At the same time, other platform interface settings of the same login ID (such as iPad) will also be reset simultaneously.</p>  |

4.1 Shortlist

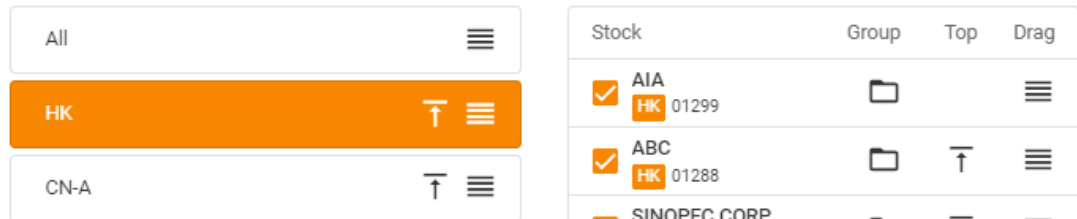
- You can view price quotes in the form of shortlist (Fig.8), including self-created selections, Hong Kong stock list, your securities holdings, etc.
- Press the upper right  key to pop up the "Watchlist group and list management" form (right, Fig. 9), where you can create or sort list groups,



| Stock | Price | %Chg |
|-----------------|--------|--------|
| AIA HK 01299 | 68.000 | -1.16% |
| ABC HK 01288 | 2.760 | +0.00% |

Fig. 8

Watchlist group and list management



| Stock | Group | Top | Drag |
|---|-------|-----|------|
| <input checked="" type="checkbox"/> AIA HK 01299 | | | |
| <input checked="" type="checkbox"/> ABC HK 01288 | | | |
| <input type="checkbox"/> SINOPEC CORP | | | |

Fig. 9

4.2 Single Price Quote

On Top 20 area on main page, various search boxes for stocks, related equities, etc., click on specific stocks to jump to the detailed price details of the security.

Depending on your subscribed plan (listed as below), the system will display the following levels of Hong Kong stock market information. See next page for further details.

Delayed Feed (Default)

- Bid-ask queue with 1 price spread, 15-min delayed

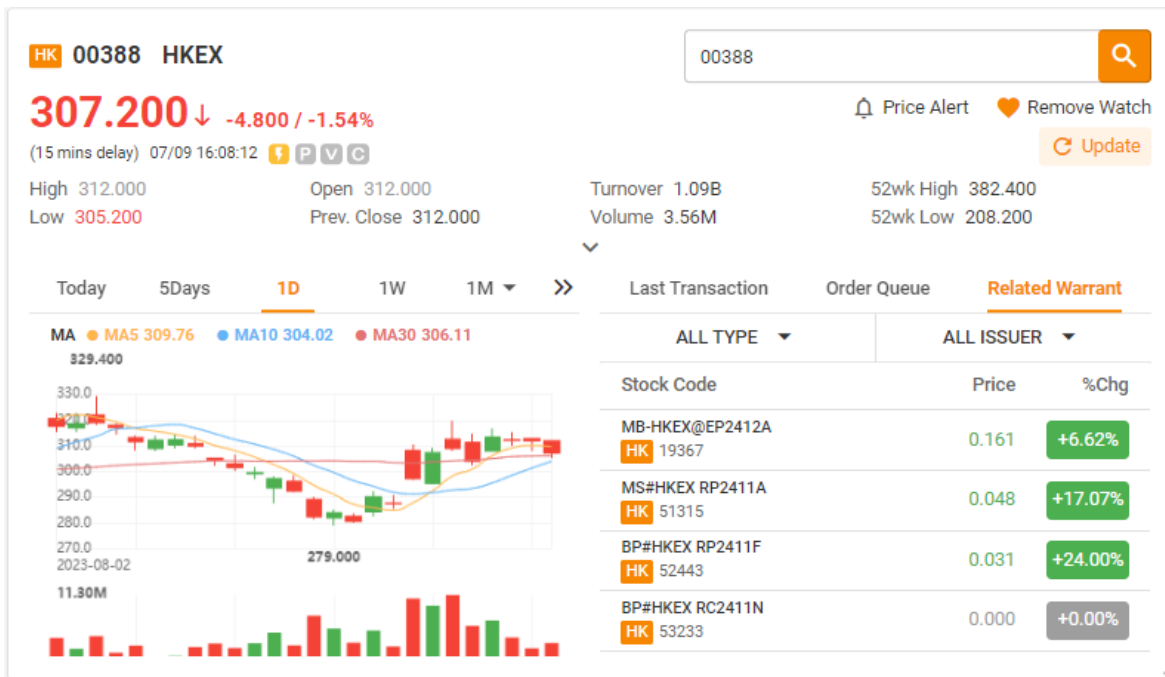
Real-time streaming






- Level 2 [10 spreads of bid-ask queue & broker queue]
- Level 1 [1 spread of bid-ask queue]

Real-time snapshot


- Plan 1 [1 spread of bid-ask queue]
- Plan 2 [10 spreads of bid-ask queue]
- Plan 3 [10 spreads of bid-ask queue & broker queue]

Portal2 Browser-Based Trading Platform User Manual (ver 1.0)



- **Security nature** : Click     to check icon info
- **Technical graph** : Technical analysis chart and trading volume chart: You can choose different time intervals
- **Real-time market info tabs**: browse specific security last matches, bid/ask queue & related warrants
- **Add / remove watch**: Press  to add or remove security from shortlist.
- **Price Alert** pop out window to set up price alert or manage current alert (Fig. 10)


PRICE ALERT MY ALERTS

HKEX (00388) 

-- / Last Update :

Add alert

Reminder type

 Price rises above

Reminder value

310.000

Frequency


☒ Once only
Alert only when the price arrives for the first time

☐ Once a day
Alert when the price arrives for the first time on each trading day

☐ Continuously
Alert every time the price arrives on each trading day

ADD ALERT

Price Alert Setting



No record

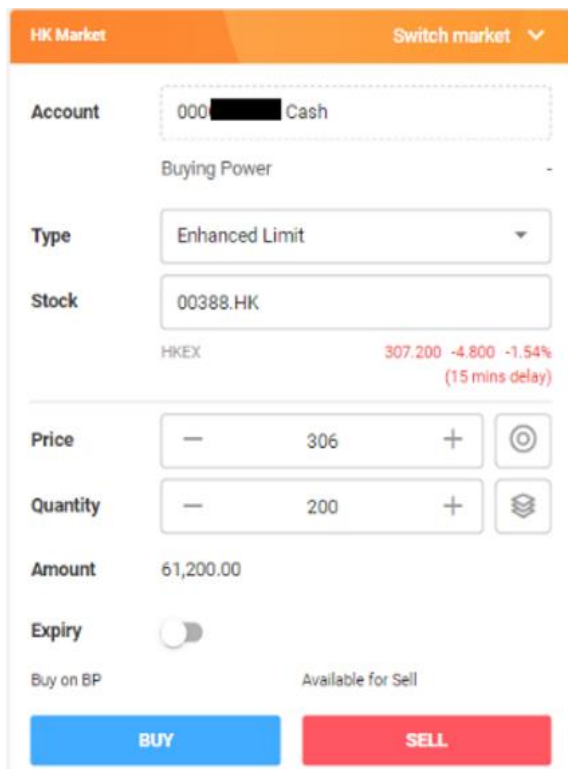
4.3 Order & Position Overview

| Position | Today | Conditional Order | | | | | HK | ▼ | 0000000011 | Cash |
|--------------|----------------|-------------------|----------|-------|------|-------|--------|---------|------------|------|
| Code | Name | Market Value | Quantity | Price | Cost | P&L | | Actions | | |
| HKD Position | | | | | | | | | | |
| 00001.HK | CKH HOLDINGS | 651,262.50 | 15,750 | 41.35 | 0.00 | +0.00 | +0.00% | Trade | | |
| 00002.HK | CLP HOLDINGS | 621,600.00 | 10,500 | 59.20 | 0.00 | +0.00 | +0.00% | Trade | | |
| 00003.HK | HK & CHINA GAS | 113,800.00 | 20,000 | 5.69 | 0.00 | +0.00 | +0.00% | Trade | | |

- “Position” tab to display current holding of specific market. Press “Trade” to place order, or press “HK” to switch market.
- “Today” tab displays all order status of that day. Press detail, cancel, modify, duplicate for corresponding actions.
- “Conditional” tab displays all smart order status. Press detail / cancel for corresponding actions. Such orders do not support modify.
- Right click at any items of any tab to pop out menu to select available functions.

4.4 Order placing

(Note: certain functions are not available for non-HK markets)



HK Market Display current market. Press “switch market” to select others.

Buying Power (BP) Real-time amount available for order placing. Currency equivalent converted.

Type HK market supports all HKEX order types and smart types (market, stop, conditional, etc). Press menu to select (note: as per broker master setting, some order types are not available)

Price Press to pop out menu, to fill in order price with nominal price /+1/-1 spread. Or press < + > or < - > to switch to next spread.

Quantity Press to pop out menu, to fill in order quantity with available shortcuts. Or press < + > or < - > to switch to next odd size.

Expiry Set up order expiry date using pop out calendar. Finally select buy/sell to submit order.

5. Account Overview

- 3 Tabs available for account record checking

| | |
|------------------------|---|
| Account Summary | Check asset status, today profit & loss, average price of holdings, underlying profit & loss, etc. |
| Account Record | Check up to last 6 month of account history, including: <ul style="list-style-type: none"> • Trade • Fund deposit/withdrawal • Currency Exchange • IPO • Corporate Action & others |
| Statement | View and download previous daily and monthly statement |

Account

| | | | | | | | |
|--|--|--|--|--|--|--|--|
| <p>Account Summary Account Record Statement</p> <p>0000000011 Cash</p> <p>Total Net Assets • HKD Equivalent Today's P&L</p> <p>-</p> <p>HK</p> <p>CN-A</p> <p>JP</p> <p>SG</p> <p>US</p> <p>Others</p> | | <p>HK</p> <p>Position Value (HKD) Today's P&L P&L</p> <p>Code Name Market Value Quantity Price Cost P&L</p> <p>HKD Position</p> <p>00001.HK CKH HOLDINGS 654,412.50 15,750 41.55 0.00 +0.00 +0.00%</p> <p>00002.HK CLP HOLDINGS 617,925.00 10,500 58.85 0.00 +0.00 +0.00%</p> <p>00003.HK HK & CHINA GAS 113,200.00 20,000 5.66 0.00 +0.00 +0.00%</p> <p>00005.HK HSBC HOLDINGS 2,363,650.00 41,000 57.65 0.00 +0.00 +0.00%</p> <p>00011.HK HANG SENG BANK 29,222,400.00 304,400 96.00 0.00 +0.00 +0.00%</p> <p>CN-A</p> | | | | | |
|--|--|--|--|--|--|--|--|

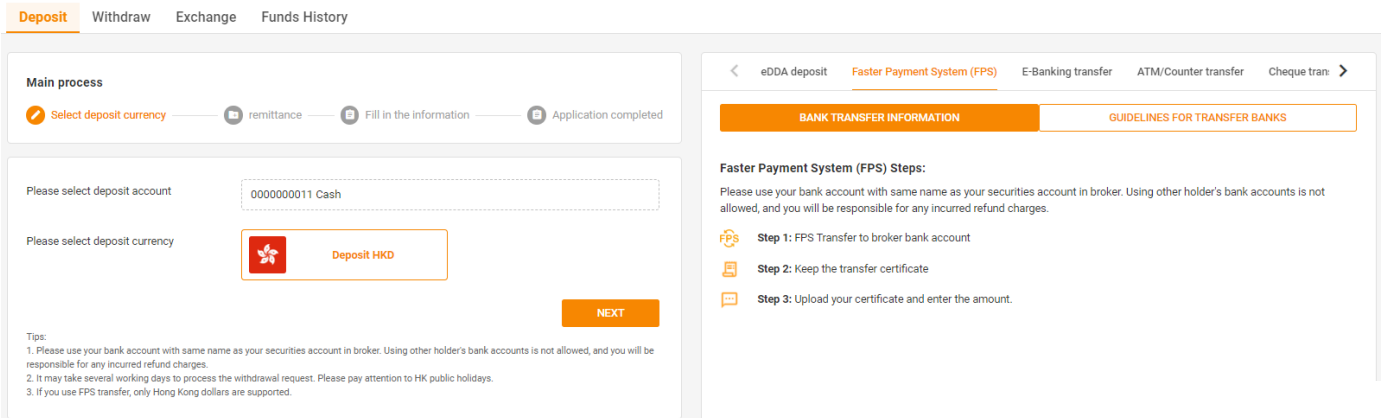
6. Fund

Below Tabs are available for fund in/out management, currency exchange and history checking.

6.1 Fund Deposit

- Follow the on-screen instructions to complete fund deposit in four steps.
- Support eDDA quick deposit, online banking, ATM/counter, check and wire transfer (note: some channels are not available as preset by brokers)
- The right section is an explanation of the corresponding steps for each deposit method for users reference.

Fund



The screenshot shows the 'Fund' section with tabs for Deposit, Withdraw, Exchange, and Funds History. The 'Deposit' tab is active. The 'Main process' section shows a progress bar with four steps: Select deposit currency, remittance, Fill in the information, and Application completed. Below this, there are fields for 'Please select deposit account' (0000000011 Cash) and 'Please select deposit currency' (Deposit HKD). A 'NEXT' button is visible. On the right, there are tabs for 'BANK TRANSFER INFORMATION' and 'GUIDELINES FOR TRANSFER BANKS'. The 'Faster Payment System (FPS) Steps' are listed: Step 1: FPS Transfer to broker bank account, Step 2: Keep the transfer certificate, and Step 3: Upload your certificate and enter the amount.

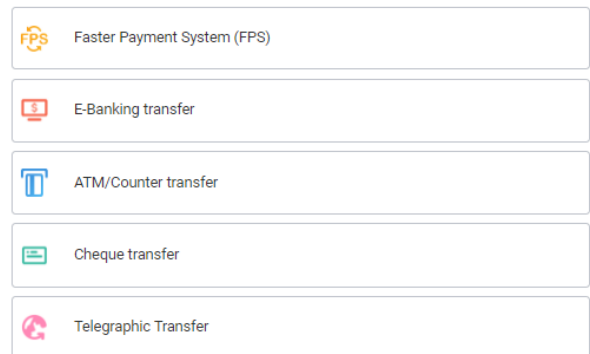
Fig. 10

- 1) Please select account to be deposited and currency first. Click <Next> (Fig.10)
- 2) Select deposit channel.
Click <Next> (Fig.11)

Transfer from bank

Other

Deposit methods



The screenshot shows the 'Deposit methods' section with a list of transfer options: Faster Payment System (FPS), E-Banking transfer, ATM/Counter transfer, Cheque transfer, and Telegraphic Transfer. Each option has a corresponding icon.

PREVIOUS

NEXT

Fig. 11

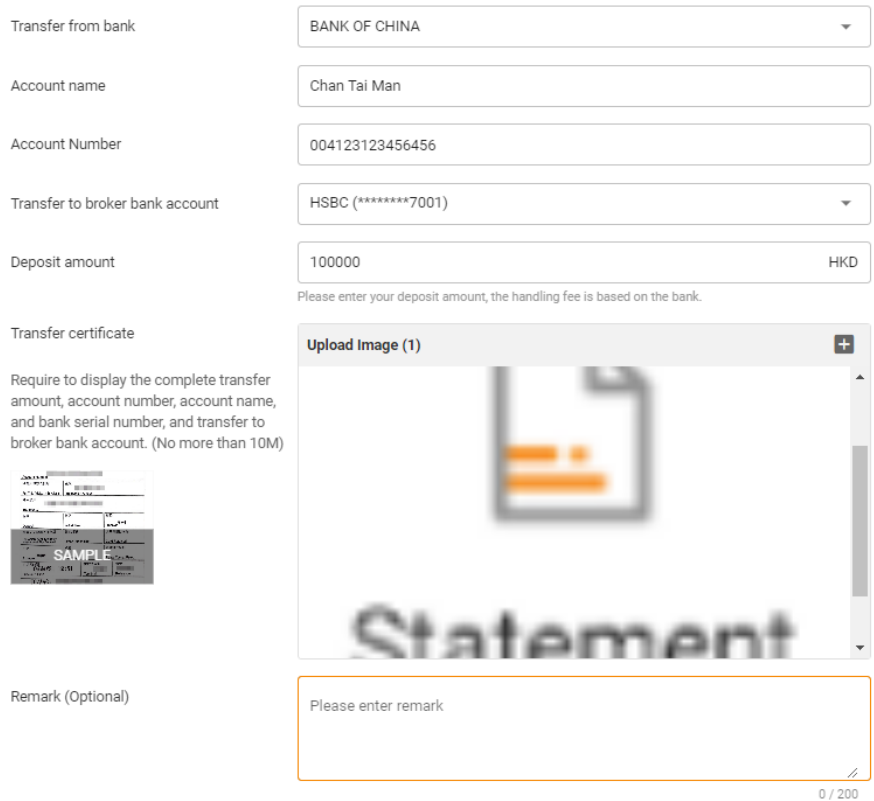
Portal2 Browser-Based Trading Platform User Manual (ver 1.0)

- 3) Follow instructions to enter various information and/or upload supporting images (depending on channel). Click <Next>. (Fig. 12) Work flow for different channels will slightly vary. Please follow on-screen instructions to complete.

- 4) Press <confirm> in pop-up box, to notify broker to collect payment (depending on the channel).

- 5) Depending on channel or brokerage process, lead time for fund good at your securities account may vary.

Notification message will be sent when the fund is ready to use.



Transfer from bank: BANK OF CHINA

Account name: Chan Tai Man

Account Number: 004123123456456

Transfer to broker bank account: HSBC (*****7001)

Deposit amount: 100000 HKD

Please enter your deposit amount, the handling fee is based on the bank.

Transfer certificate: Require to display the complete transfer amount, account number, account name, and bank serial number, and transfer to broker bank account. (No more than 10M)

Remark (Optional): Please enter remark

Fig. 12

6.2 Fund withdrawal

- 1) Please select account to be deposited and currency first. Click <Next> (Fig. 13)



Please select withdrawal account: 0000000011 Cash

Please select withdrawal currency: Withdraw HKD

Withdraw to: No record

Withdrawal amount: 100000 HKD

Withdrawable: 0.00 HKD

Handling fee:

Remark (Optional): Please enter remark

NEXT

Tips:

1. Bank account name must be the same as the withdrawal account name.
2. It may take several working days to process the withdrawal request. Please pay attention to HK public holidays.

Fig. 13

- 2) Enter amount and remarks. Click <Next> (Fig. 14)
- 3) System pop out small window. Press <Next> to complete application.



PREVIOUS NEXT

Fig. 14

- 4) Depending on brokerage process, withdrawal lead time may vary. Please check progress at "Fund History" page.

6.3 Currency Exchange (FX)

- 1) Input currency and amount to be exchanged. Expected exchange amount will be calculated. Input remarks if necessary (Fig. 15)
- 2) Check details in pop-up box. Press <Confirm> to proceed.
- 3) Check progress at “Fund history” page (See Section 6.4 below).

Exchange

Please select account for

currency exchange

From

Exchangeable Amount **0.00**

Reference Rates

Handling Fee Free

To (Estimated)

Remark (Optional)

0 / 200

SUBMIT

Tips:
Exchange rates indicated above are for reference only.

Fig. 15

6.4 Fund History

- Check Withdrawal, Deposit & Exchange records, up to last 1 year (Fig. 16).
- Instructions with “Processing” status can be overturned by pressing “cancel” button.
- Press “detail” of specific record to view full record.

| <div> Deposit Withdraw Exchange </div> <div> <input type="text" value="000000011 Cash"/> <input type="text" value="6 Months"/> <input type="text" value="All Status"/> </div> | | | | | | | | |
|--|---------------------------|------------------|--------------------|-----------------|----------------|------------|--------|---|
| Submit Time | Payer Bank | Payee Bank | Deposit Methods | Deposit Account | Deposit Amount | Status | Remark | Actions |
| 11/09/2023 22:43 | BANK OF CHINA (*****6456) | HSBC (*****7001) | E-Banking transfer | 000000011 Cash | 100,000.00 HKD | Processing | | Detail Cancel |
| 25/08/2023 00:08 | HANG SENG (*****1133) | HSBC (*****7001) | E-Banking transfer | 000000011 Cash | 100,000.00 HKD | Processing | Urgent | Detail Cancel |

Fig. 16

7. Order History

- Use “Order” button at main page to visit this page, to view order history, segregated by *normal order*, *conditional order* and *transaction summary* tabs

Order

Normal Order Conditional Order Transaction Summary Last Update : 11/09/2023 22:56:53

0000000011 Cash HK Stock Code 6 Months Buy / Sell All Status RESET


- Apply filter of stock code, market, day range, etc. to narrow down results
- Press <reset> to remove all filter and display all orders
- Press <details> of each order to read in-depth details

8. IPO


- Access by “IPO” button at main page or left side shortcut

IPO

Open To be listed(grey mkt) History Last Update : 11/09/2023 22:58:44


| Code | Securities Name | Cash Application Deadline | Margin Application Deadline | Offer Price | Prospectus | Research Report | Action |
|--|-----------------|---------------------------|-----------------------------|-------------|------------|-----------------|--------|
|  No record | | | | | | | |

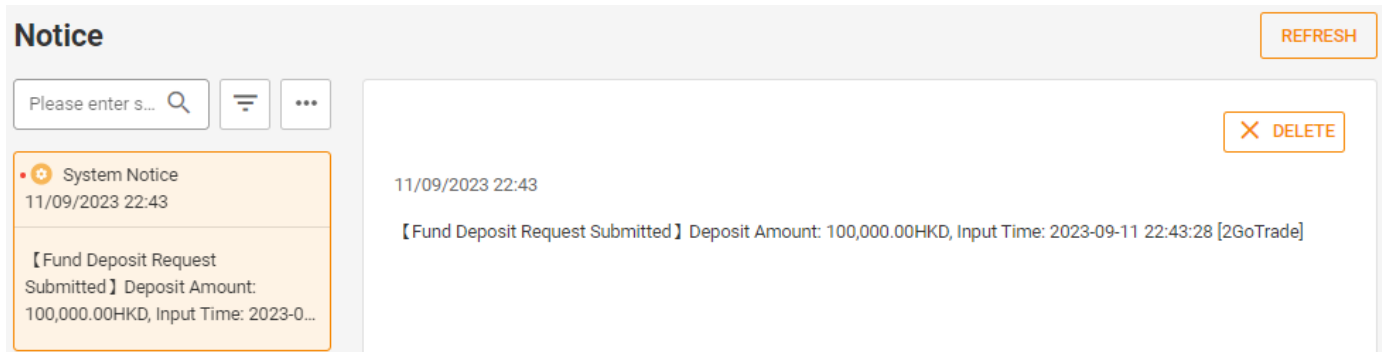
IPO Schedule


No record

- <Open> tab shows IPO currently available for subscribe, with details. Press <Subscribe> button to complete application process step-by-step as shown on screen.
- <To be listed (Grey Mkt)> tab shows the securities completed allotment process and awaiting for listing. The rightmost “action” column will show <Trade> button when grey market is active.
- <History> shows IPO subscription history and progress. Various functions are available at <Action> column including <cancel> to withdraw the subscription, if it’s still open.

9. System Notifications

- Press <notification> button at left side shortcut or  icon (number shows unread messages) to visit notifications page








-  Press to pop up menu to display message type (Fig.17)
-  More functions like mark all as read, or delete all notifications
-  Delete specific message
-  Manual refresh notifications



Fig. 17

10. Help Centre

- Press at left side  **Help Center** shortcut to visit <Help Centre> page

Help Center

Contact us

Should you have any further enquiries, please contact us at Customer Service Hotline

Transaction Hotline 852-22320200

Customer Service Hotline 852-22320200

Feedback

Should you have any comments or advice, please leave a message. We are pleased to hear from you

FEEDBACK

2GoTrade Demo Limit

| | |
|------------------------|--------------------|
| Broker Name | Wilson Cheung |
| Customer Service Email | cs-hk@2GoTrade.com |
| Version Number | 1.0.2-7016 |

Frequently Asked Question

Enquires on FAQs? The answer to your question may already be available here

ACCOUNT TRADE FUND IPO

How to make my account more secure?

We added TouchID/FaceID authentication to protect your personal information and trading activities, which can be enabled through "security settings" in the settings page. If your login is inactive for more than 30 minutes, our system will automatically logout your session to prevent unauthorized trading activities.

TouchID/FaceID is not working ?

After you cancelled your mobile device registration, FaceID/TouchID login and mobile security key will be disabled. You need to login with one-time password and re-registered to enable the FaceID/TouchID login functions.

- You can find contact details here
- Opinion:** Press <Feedback> button to pop up window. Input your questions and attach file if necessary. Press <Submit> to complete
- Frequently Asked Questions (FAQ)** are further categorized into Account, Trade, Fund and IPO tabs. Find suggested answers based on the FAQ

11. Setting

Settings

Account Information

LV2 Advanced Quote

HK Stock Real-Time Quotation

DON'T SHOW AGAIN

LEARN MORE

Login Account

000000001

Quotation Plan

HK Delay Quote Plan

Brokerage Terms

[Privacy](#) [Disclaimer & Risk Disclosure](#) [General Risks of Trading Derivatives](#)

Security Settings

Password Setting

[Change Login Password](#)

Notification Settings

Order Notice

☒

System Notice

☒

News Notice

☒

Browser message push

☒

You can turn on the notification permission of your browser to receive the latest news.

Press <Settings> icon at left side shortcut to be access to below functions:

- Check you login ID and current market data plan subscribed
- Change password
- Notifications preference setting
- General UI preference

— The End —