Phillip Pro

User Manual

V1.1.2

2026-10

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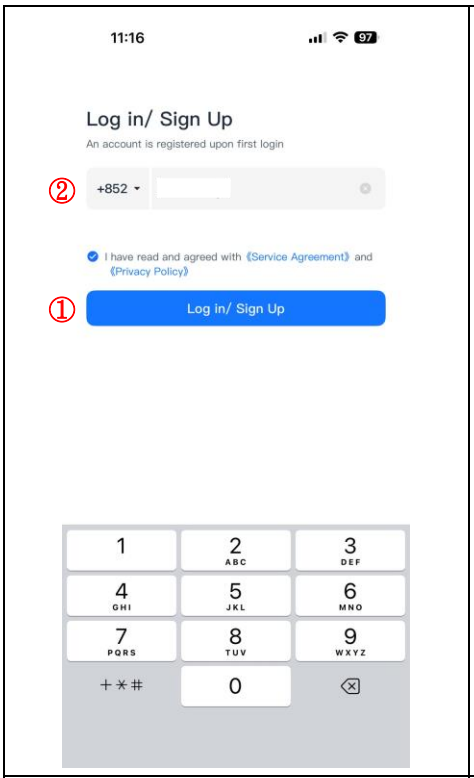
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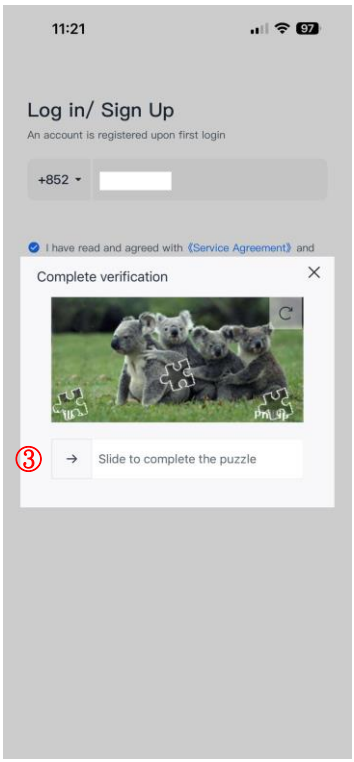
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Getting Started

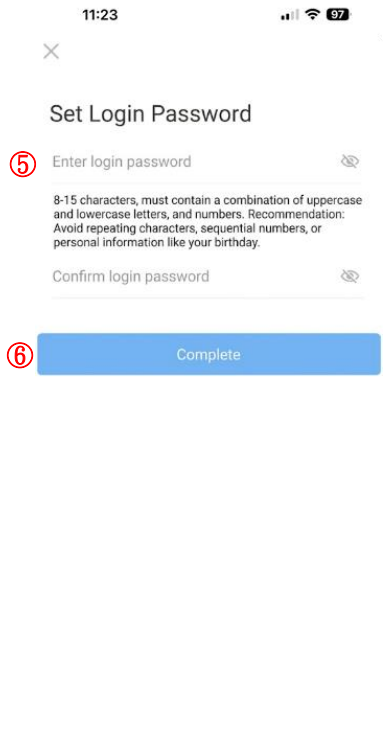
1.1 Registration

First-time users will need to complete the following steps to register for Phillip Pro:
①Enter mobile number > ②Log in/ Sign Up > ③Complete security verification > ④Enter SMS verification code > ⑤Set login password > ⑥Complete







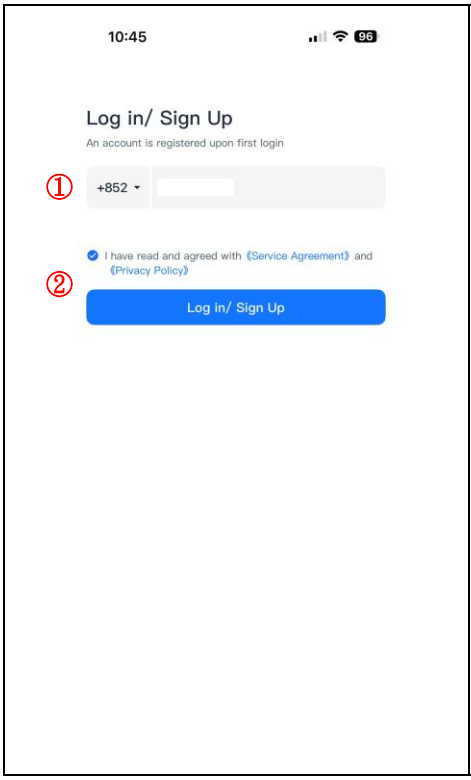


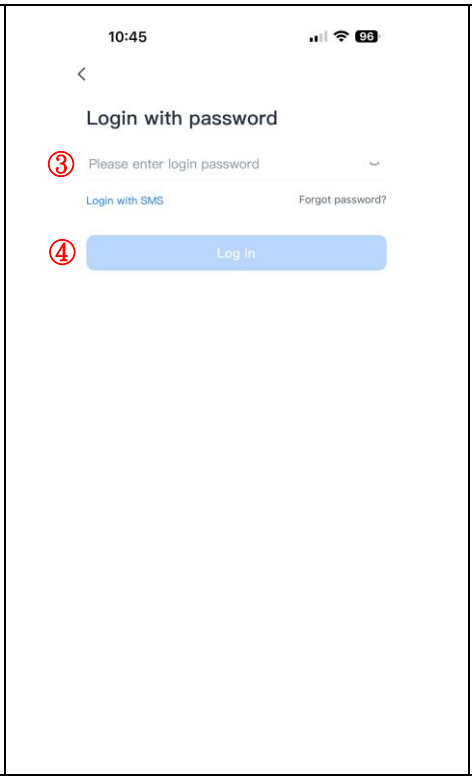
1.2 Log In

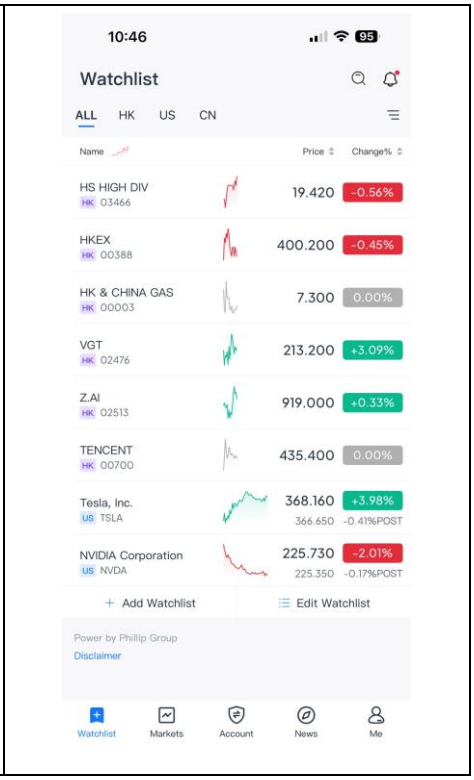
Registered users of Phillip Pro can log in directly via password or SMS verification code:

Password Login

①Enter mobile number > ②Log In / Sign Up > ③Enter password > ④Log in > Login successful

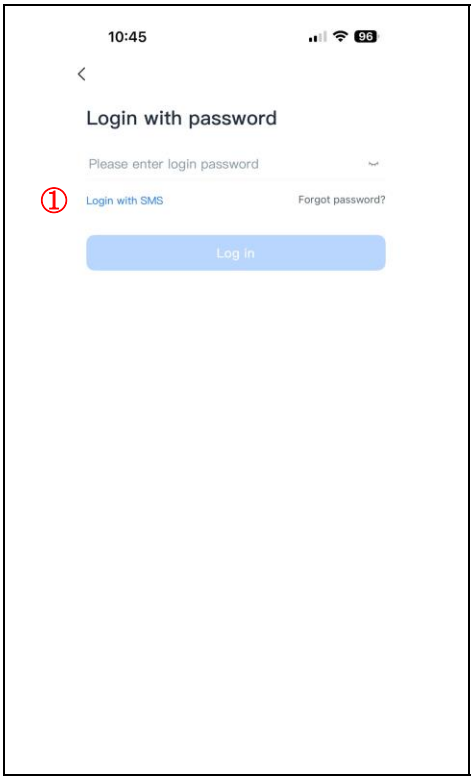


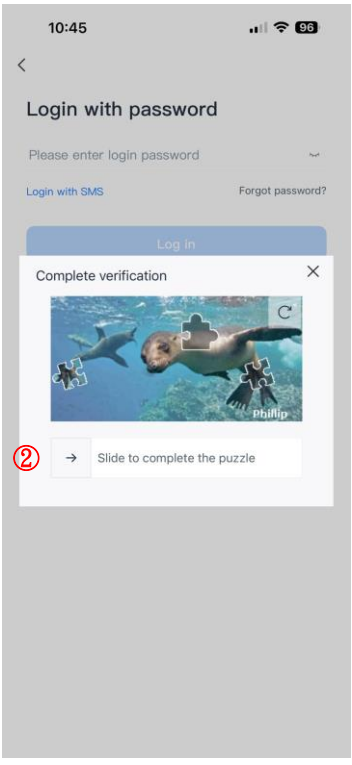




SMS Verification Code Login

①Select Login with SMS > ②Complete verification > ③Enter SMS verification code > Login successful

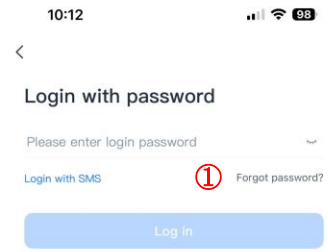


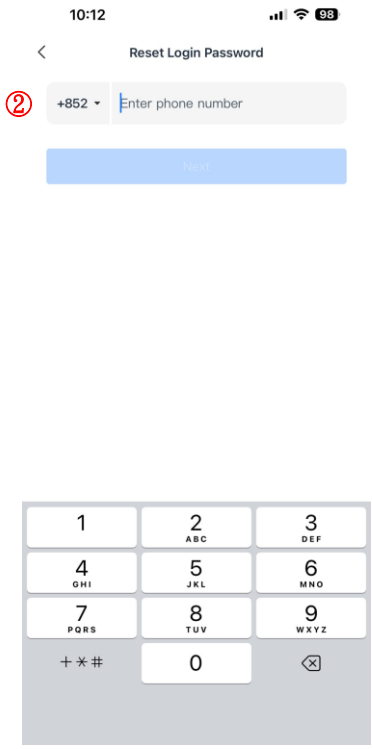


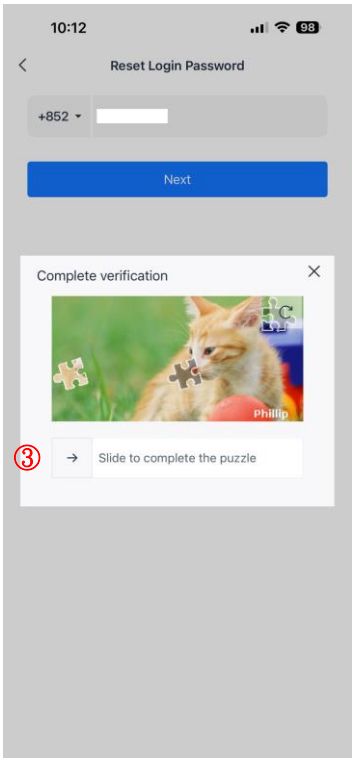


Forgot Password

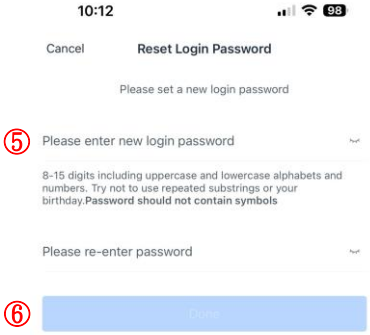
①Click “Forgot password” > ②Enter mobile number > ③Complete verification > ④Enter SMS verification code > ⑤Set new login password > ⑥Done







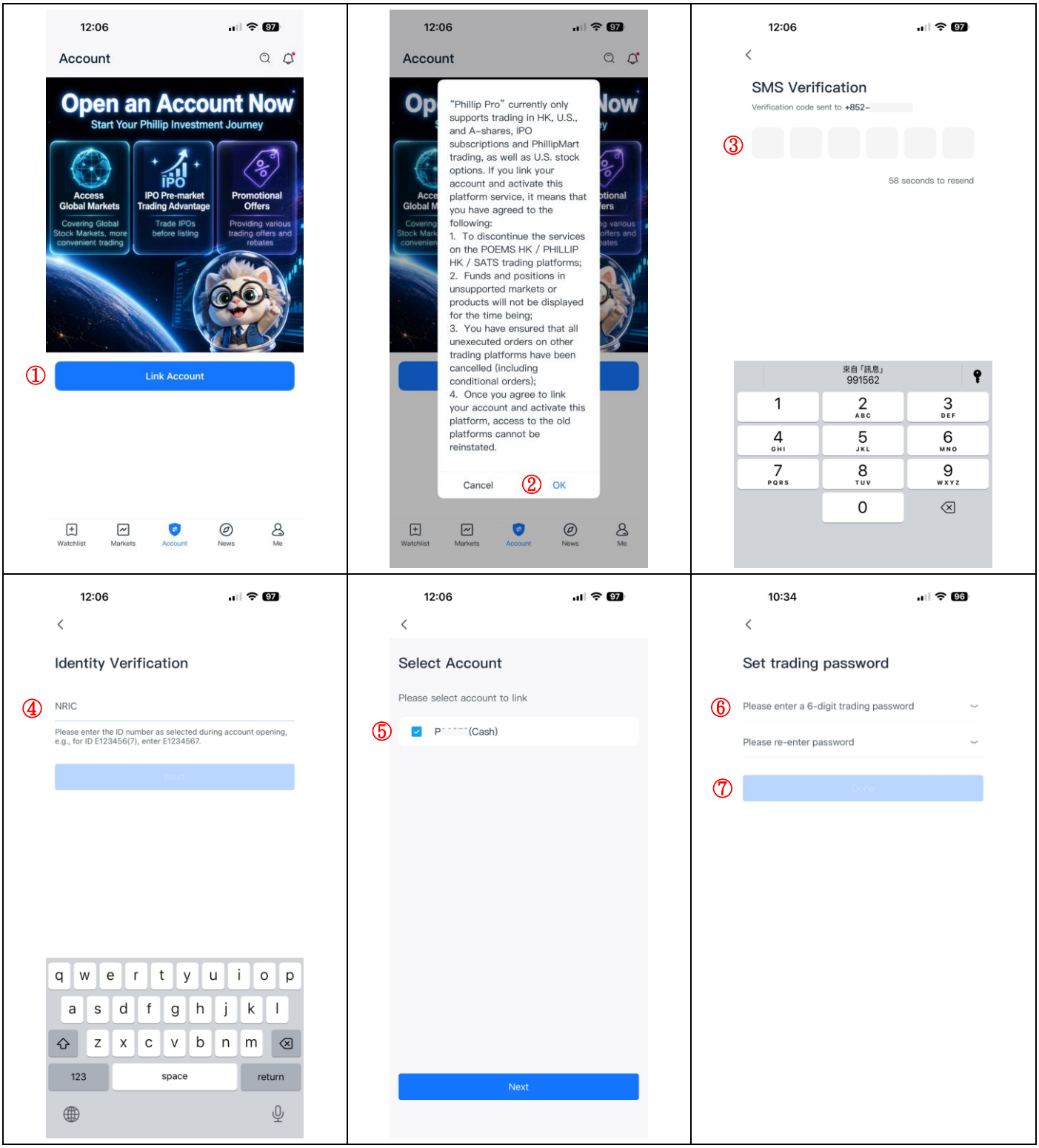




1.3 Link Account

You can link your Phillip Account on the “Account” or “Trade” page.

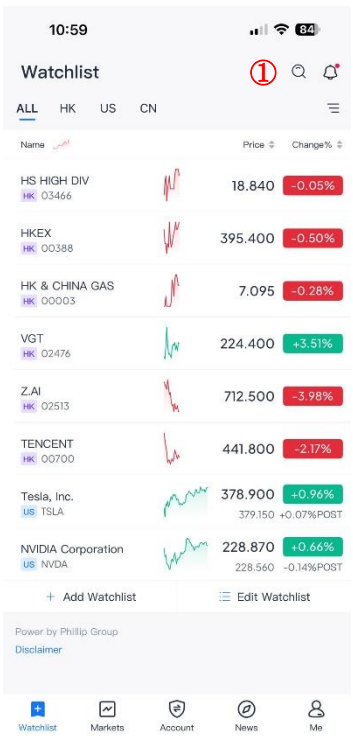
①Link Account > ②Confirm Terms & Conditions > ③Enter SMS verification code > ④Enter ID number> ⑤Select account to link > ⑥Set 6-digit trading password > ⑦Done

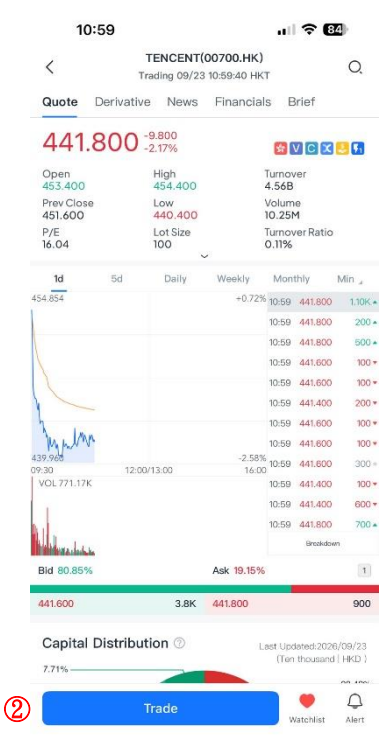


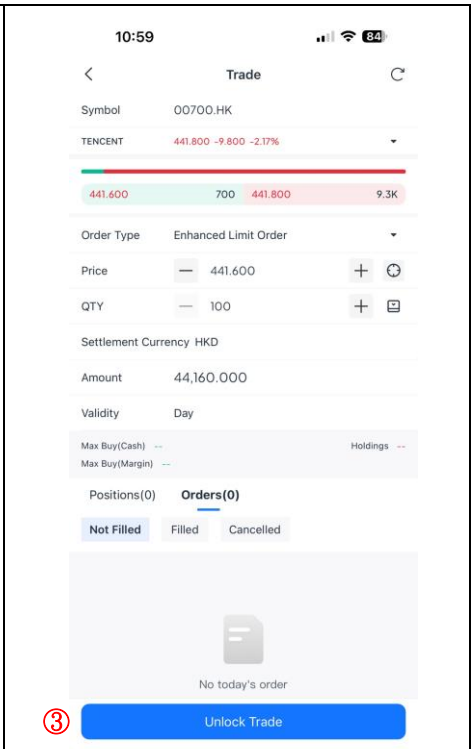
1.4 Trading Password Unlock

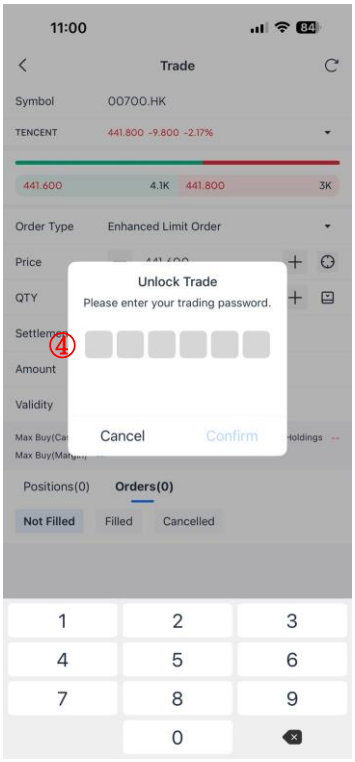
Enter your trading password to unlock access when entering the「Trade」or「Account」page:

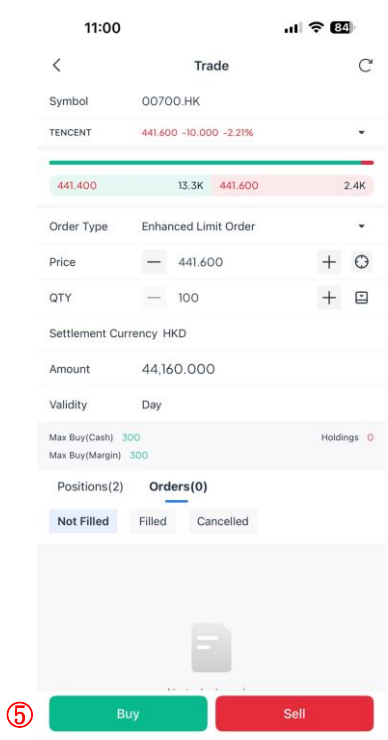
①Select a stock from the "Watchlist" or via "🔍" to enter the trading page > ②Trade> ③Unlock Trade > ④Enter trading password > ⑤Successfully unlocked







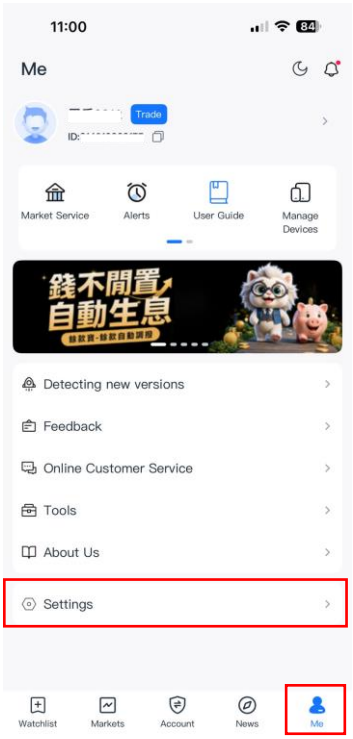


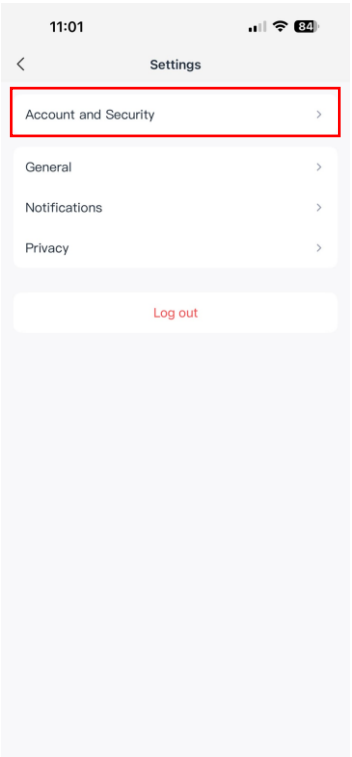


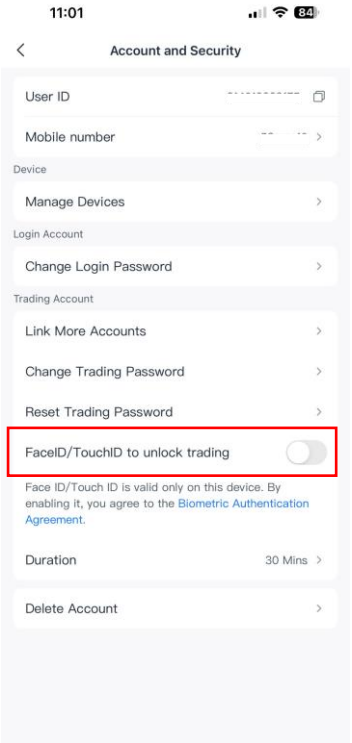
Set Up Biometric Unlock

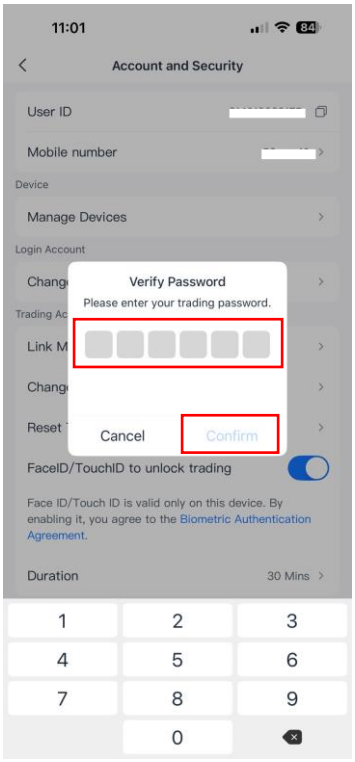
In addition to the trading password, you can also set up Face ID / Touch ID to unlock trading:

Tap “Me” tab > Settings > Account and Security > Turn on “Face ID / Touch ID to unlock trading” > Enter Trading Password > Confirm





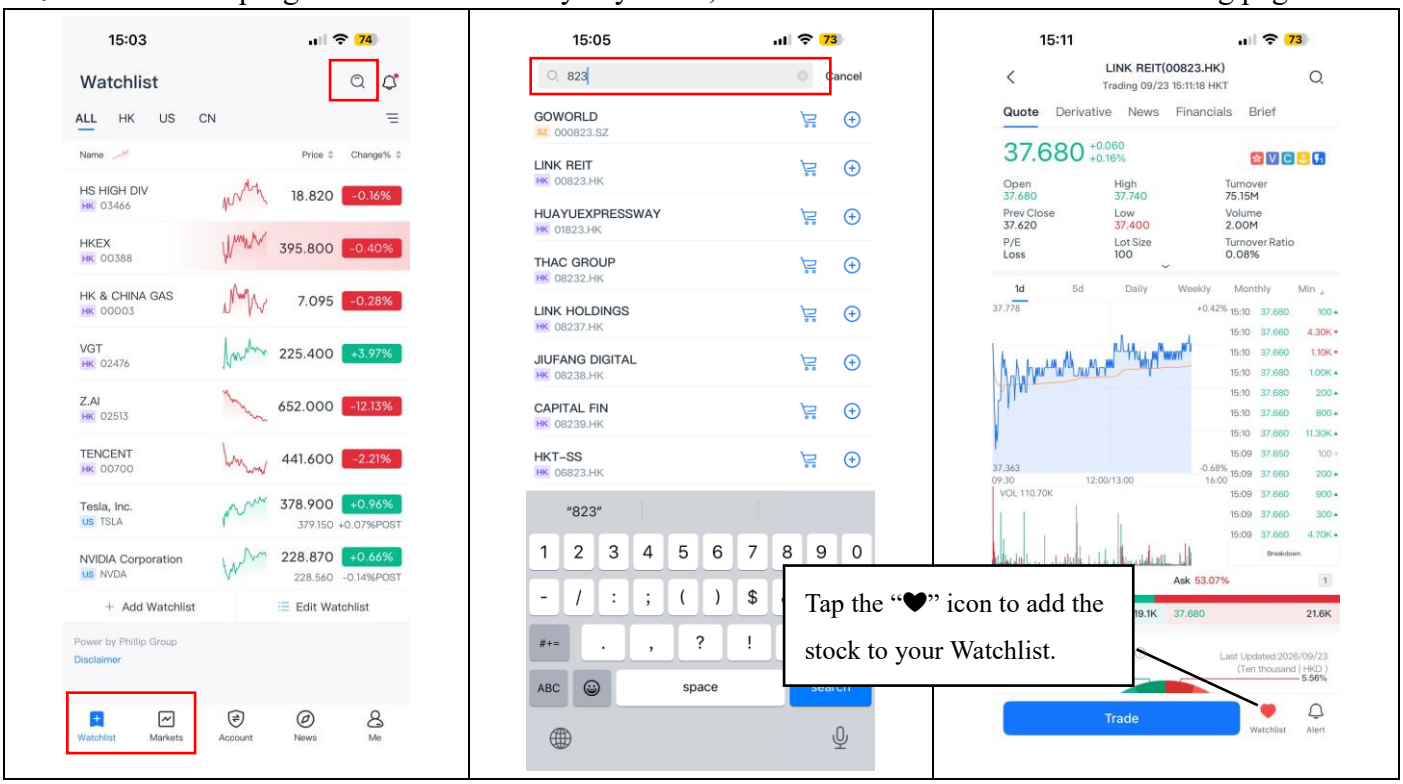




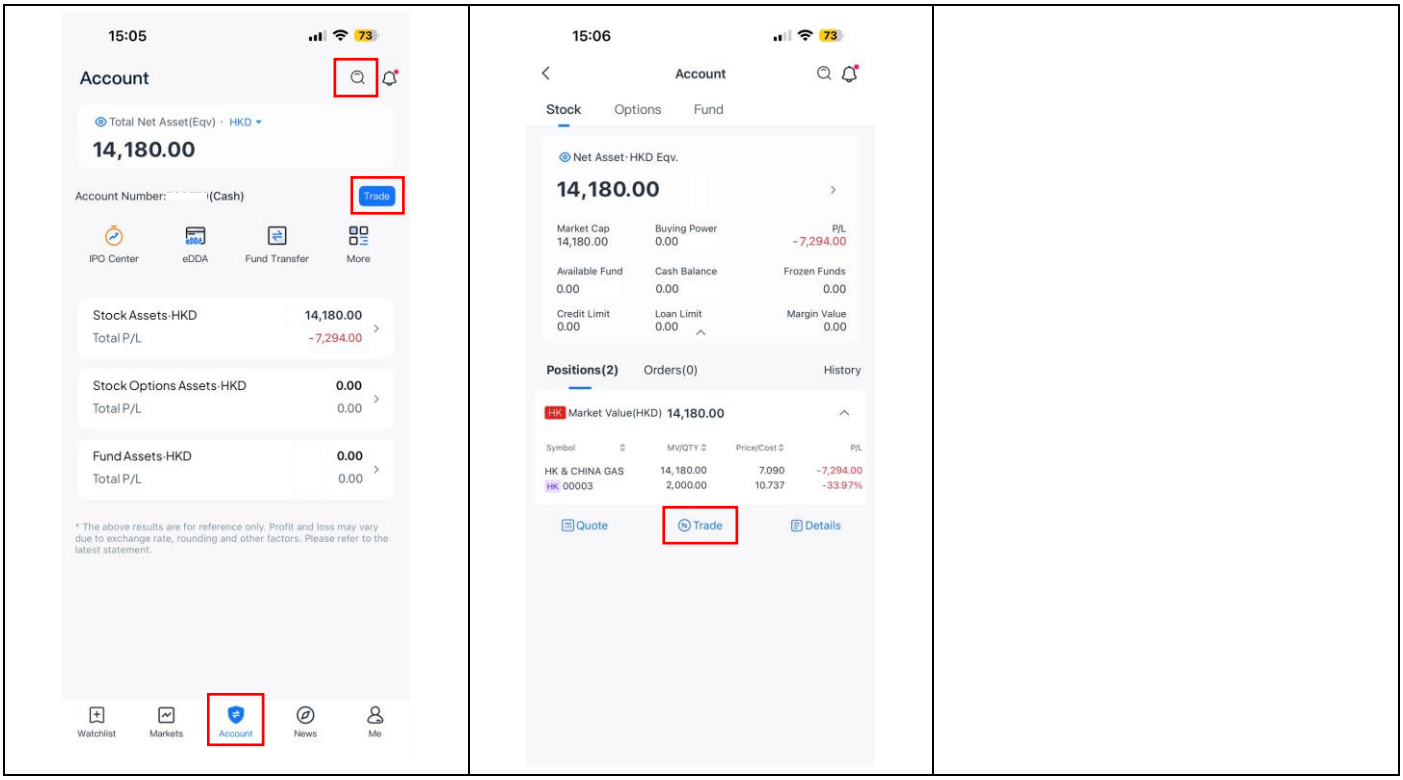
Trading

2.1 Trading Entry

Method 1: Tap the required stock directly from the "Watchlist" or "Markets" page. Alternatively, tap the "🔍" icon in the top right corner to search by keywords, then select the stock to enter the trading page.



Method 2: Tap the "🔍" or "Trade" on the "Account" page to search for a stock, or tap "Trade" directly below the stock on your "Positions" page.

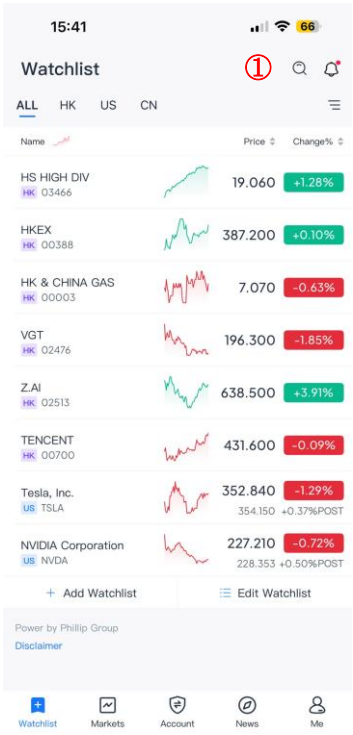


2.2 Order Placement

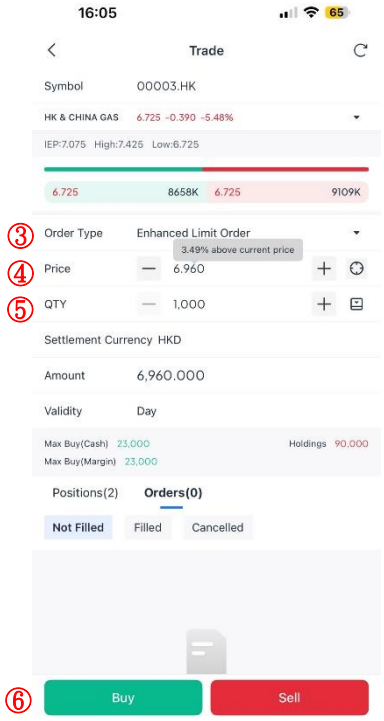
Phillip Pro provides a clean and user-friendly order placement interface, allowing you to complete your order process quickly and conveniently.

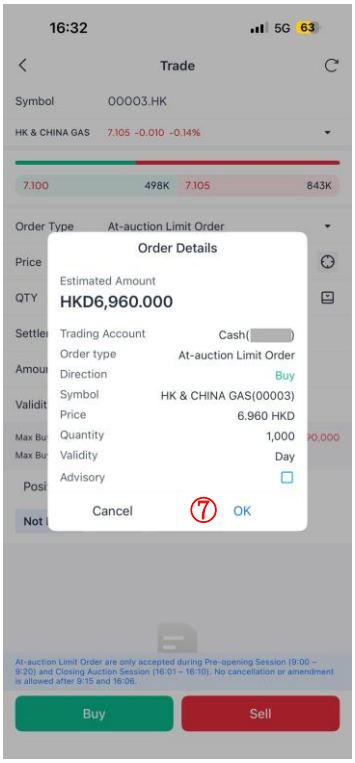
2.2.1 Hong Kong Stock

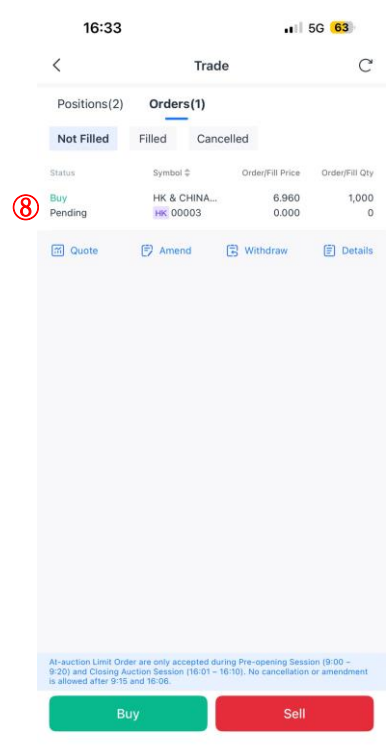
①Search for the stock > ②Tap “Trade” > ③Select Order Type > ④Enter Price > ⑤Enter Quantity > ⑥ Tap “Buy/Sell” > ⑦Tap “OK” to confirm order > ⑧View order status in “Orders” page





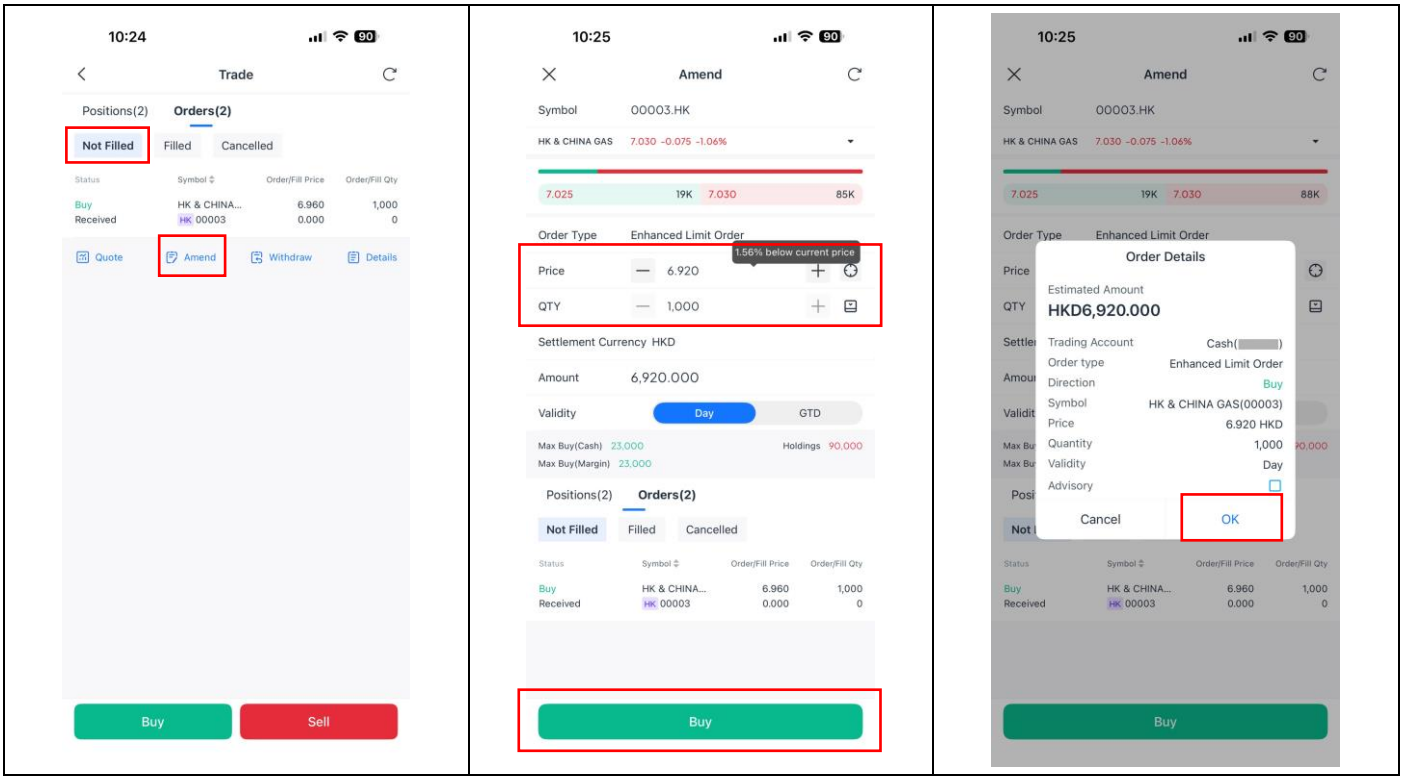






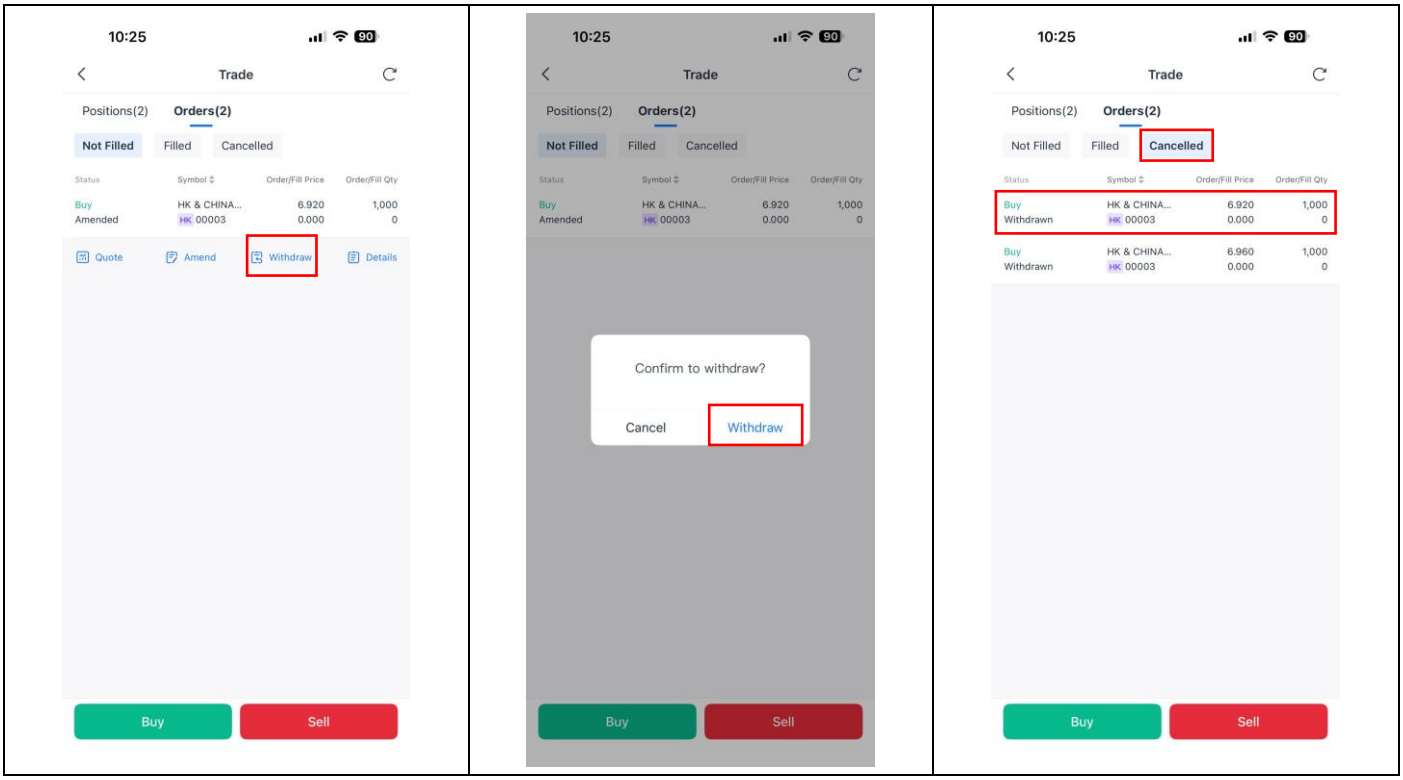
Amend Order

Click on the “Not Filled” order you wish to change > Tap “Amend” > Adjust the Price/Quantity > Tap “Buy/Sell” > Tap “OK” to confirm the changes

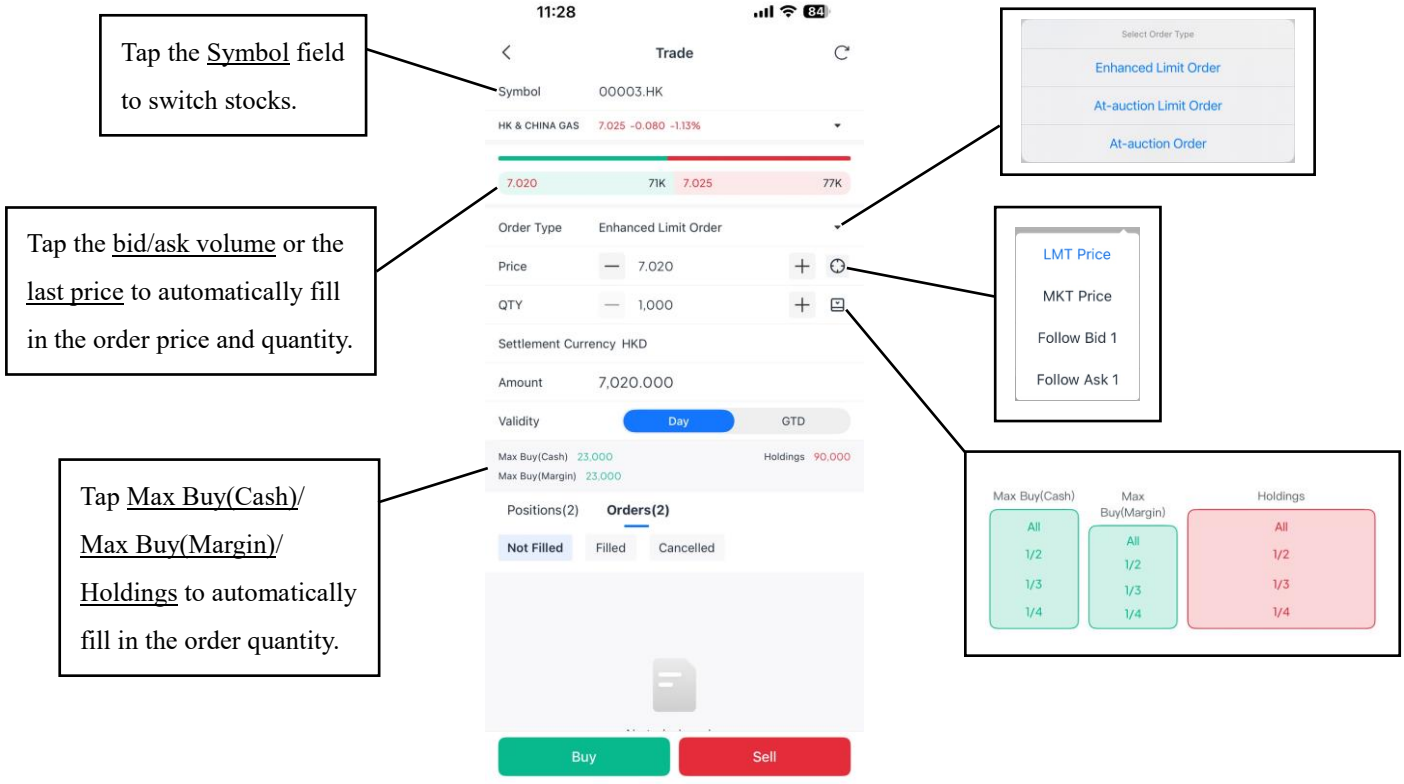


Withdraw Order

Click on the “Not Filled” order you wish to cancel > Tap “Withdraw” to confirm > View order status



Notes:



* Order Types

Enhanced Limit Order	Allows you to place a buy or sell order during the Continuous Trading Session that matches up to 10 price queues simultaneously to secure the specified price or better.
At-auction Limit Order	An At-auction Limit Order is entered with a specified price during auction sessions and matched based on price-then-time priority at the final Indicative Equilibrium Price (IEP). Pre-opening Session: Unfilled orders convert to standard limit orders and transfer to regular trading. Closing Auction Session: Unfilled orders are automatically cancelled after the random closing.
At-auction Order	An At-auction Order is entered without a specified price, matches at the final IEP, and is automatically cancelled if unfilled after the pre-opening or closing auction session.

* Set Price

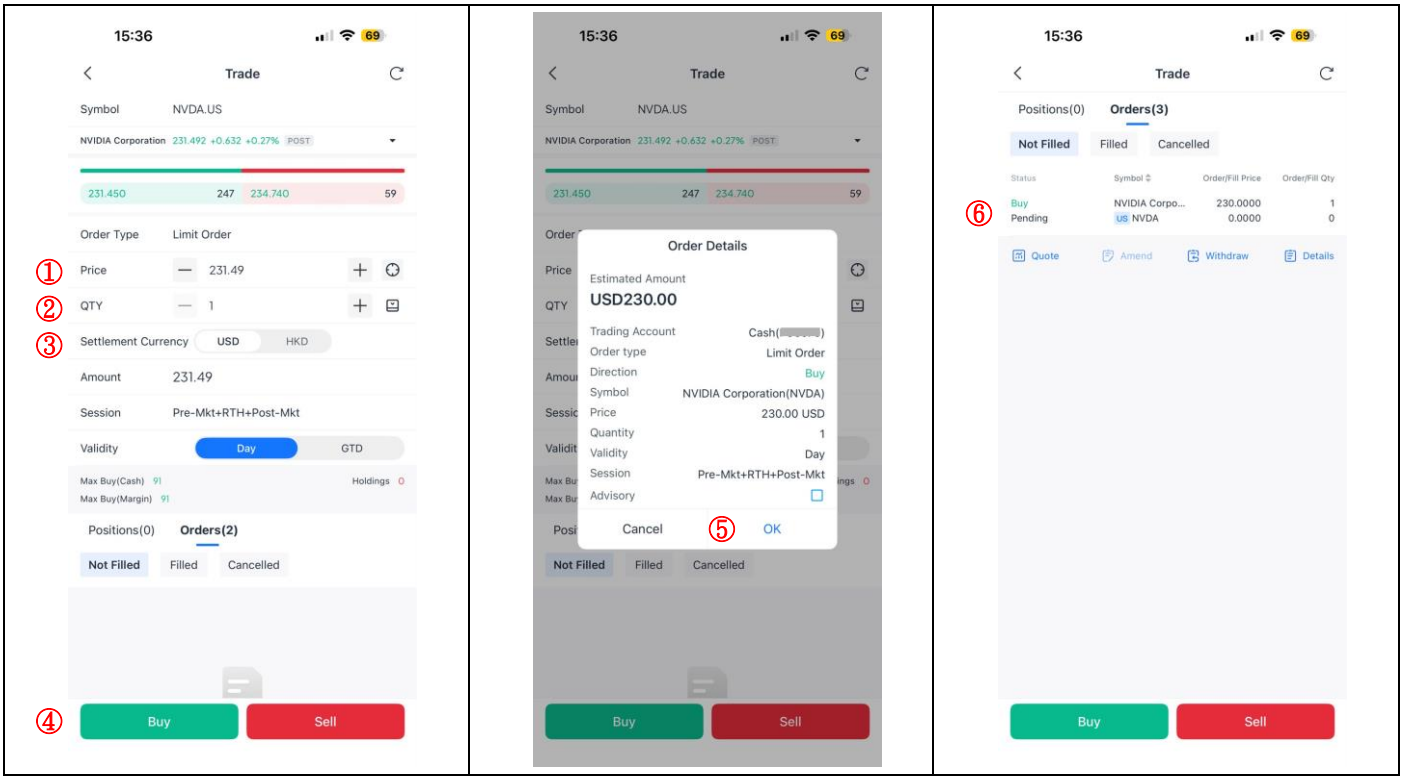
LMT Price	Enter a specified price to place the order.
MKT Price	Place the order directly at the current market price.
Follow Bid 1	Place the order at the highest buying price currently on the market.
Follow Ask 1	Place the order at the lowest selling price currently on the market.

* Set Quantity

Max Buy(Cash)	Max buying quantity based on your cash balance.
Max Buy(Margin)	Max buying quantity based on total buying power (cash + margin value).
Holdings	Max quantity available to be sold from your current holdings.

2.2.2 Foreign Stock

①Enter Price > ②Enter Quantity > ③Select Settlement Currency > ④Tap Buy/Sell > ⑤Confirm Order > ⑥View order status in “Orders” page

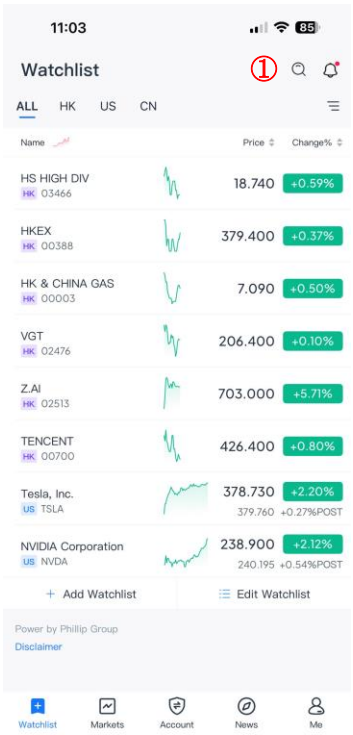


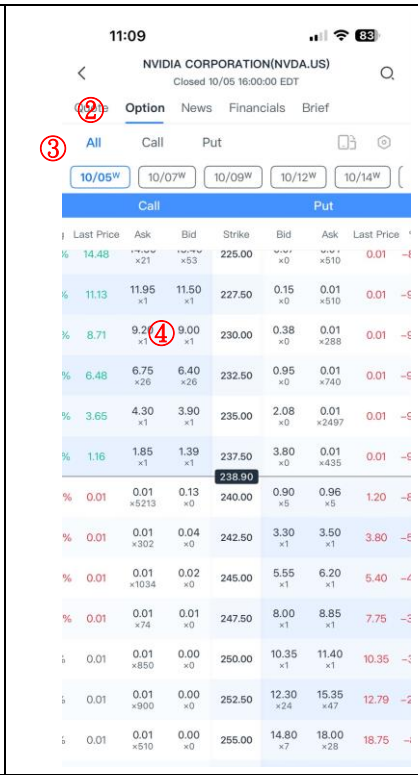
Notes:

* Foreign stocks only support Limit Orders.
* Foreign stock orders cannot be modified. They can only be withdrawn and replaced with a new order.
* U.S. stocks support Pre-market, Regular, and Post-market sessions. The system automatically detects the current session upon order placement.

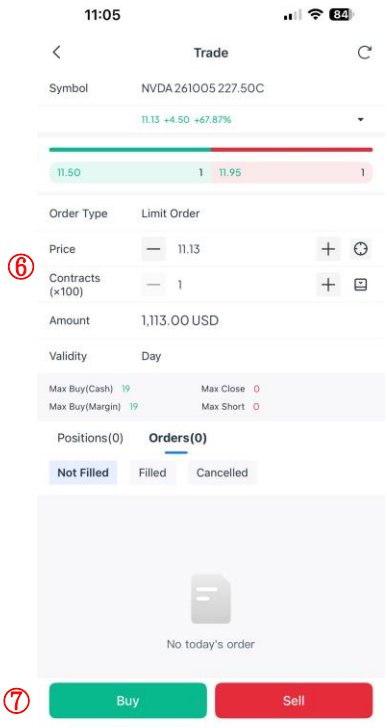
2.2.3 US Option

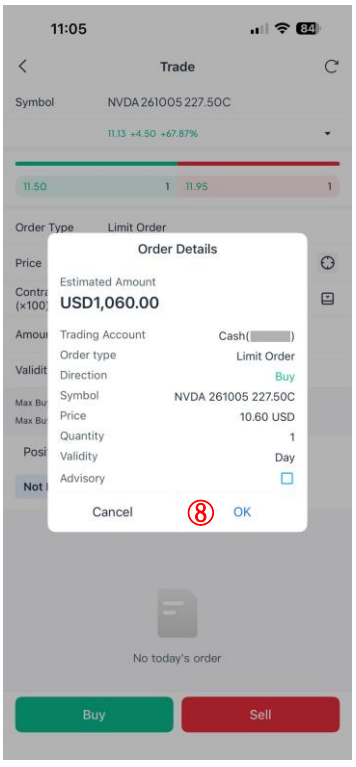
①Search for the US Stock > ②Tap “Option” on the market information page > ③Select Call/Put, Expiration Date and Strike Price > ④Tap the desired contract in the quotes section > ⑤Tap “Trade” > ⑥Enter the price and number of contracts > ⑦Tap “Buy/Sell” > ⑧Tap “OK” to confirm order > ⑨View order status in “Orders” page

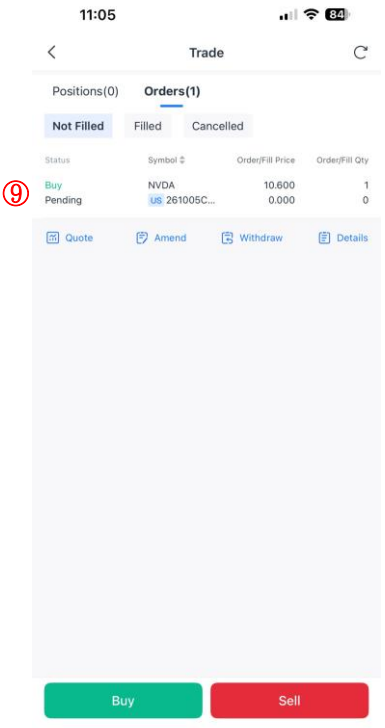






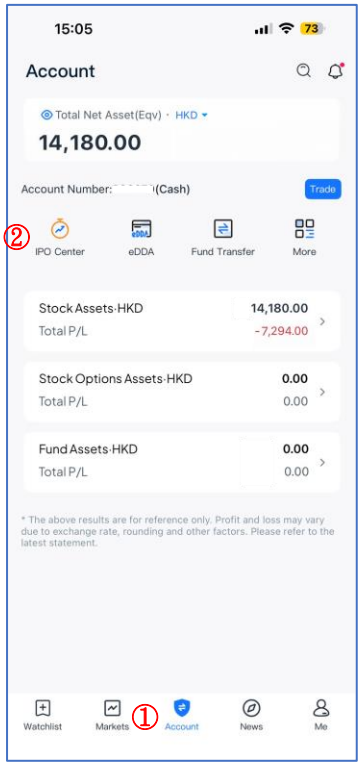


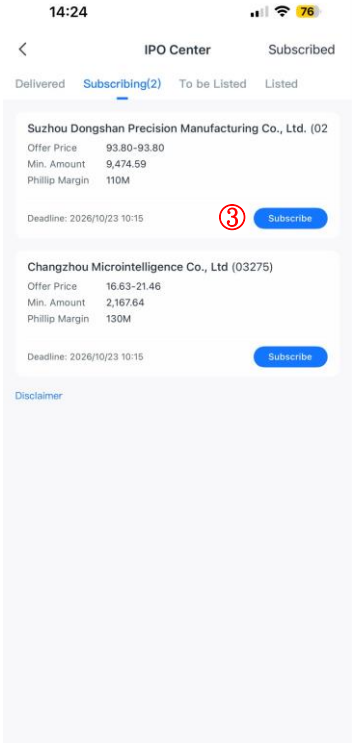


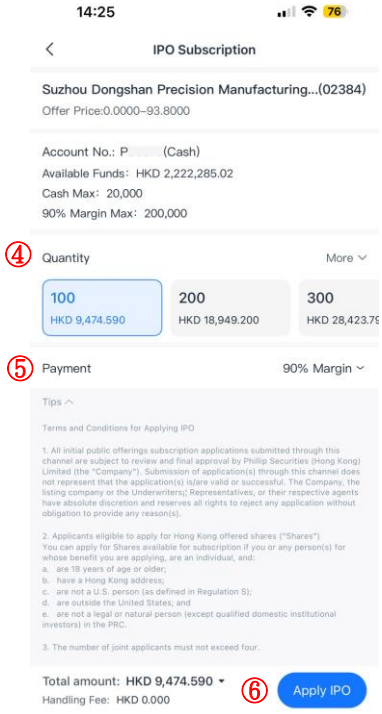


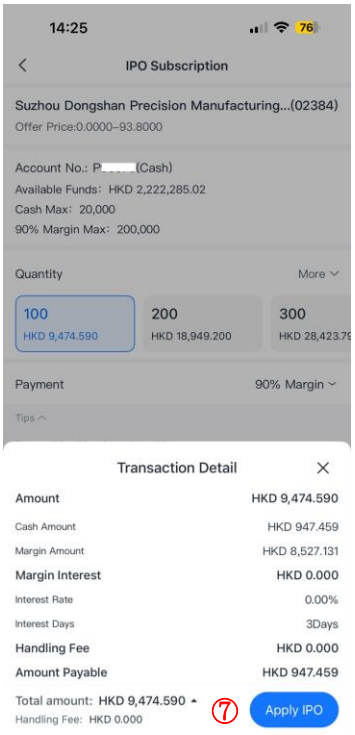
2.2.4 IPO Subscription

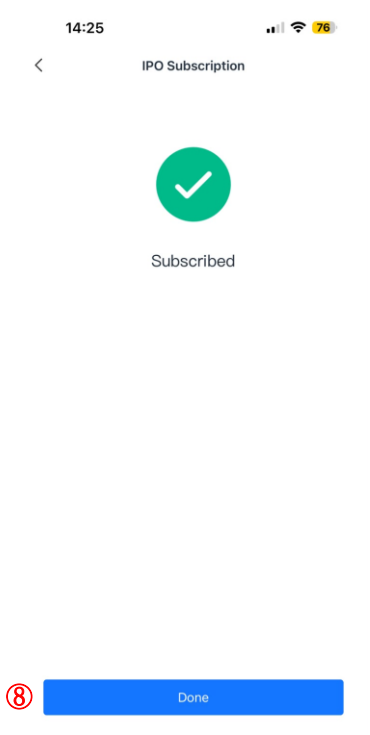
①Tap “Account” > ②IPO Center > ③Tap “Subscribe” on the required stock> ④Select subscribe “Quantity” > ⑤Select “Payment” method > ⑥Tap “Apply IPO” > ⑦Review Transaction Detail and tap “Apply IPO” again to confirm> ⑧Done





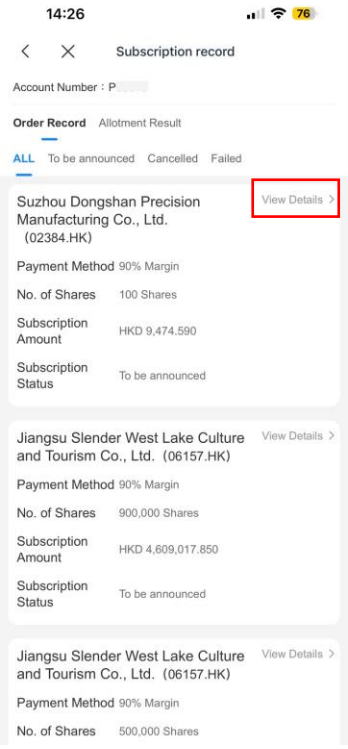


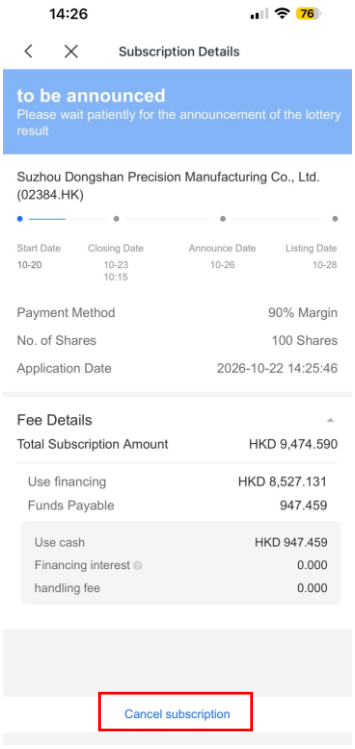


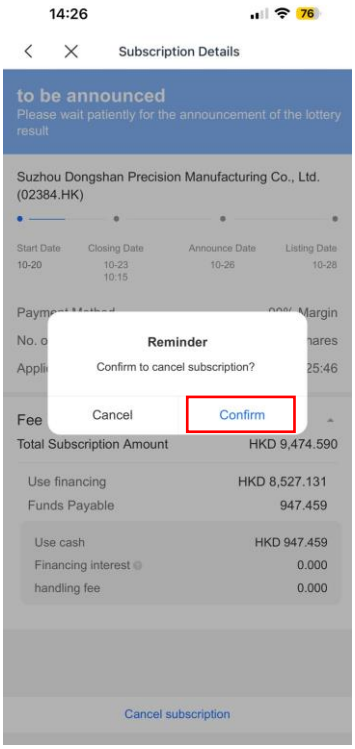


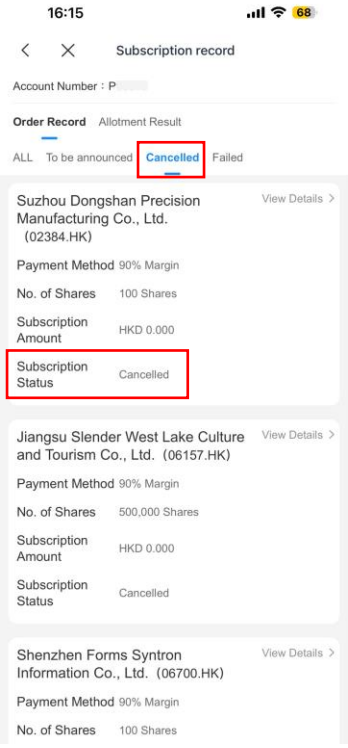
Cancel IPO Subscription

Tap “View Details” on the IPO you wish to cancel > Cancel subscription > Tap “Confirm” to cancel subscription > Go to “Order Record” to verify that the IPO status is displayed as “Cancelled”





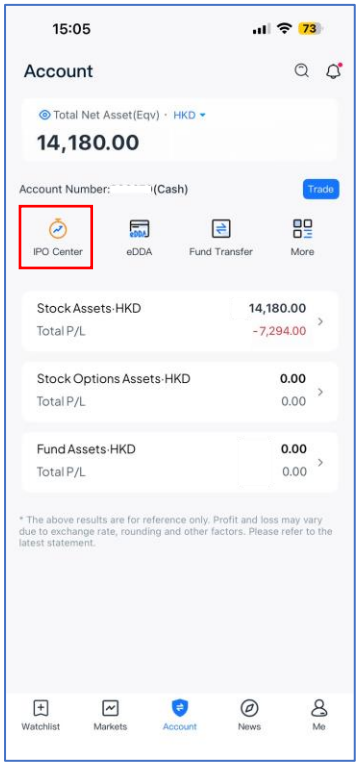
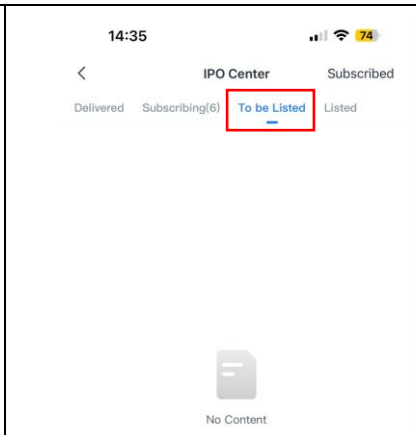




2.2.5 Grey Market

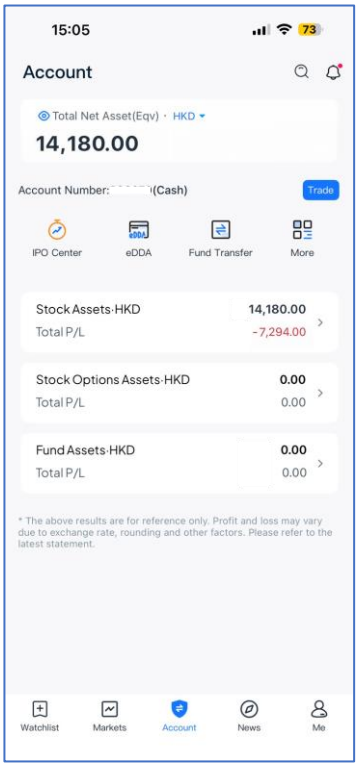
Grey market trading hours are from 16:15 to 18:30 on the business day immediately preceding the IPO listing date.

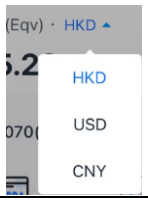
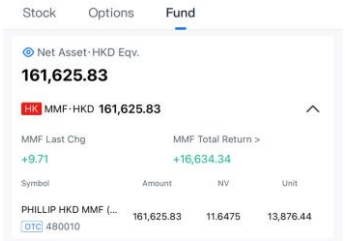
IPO Center > To be Listed

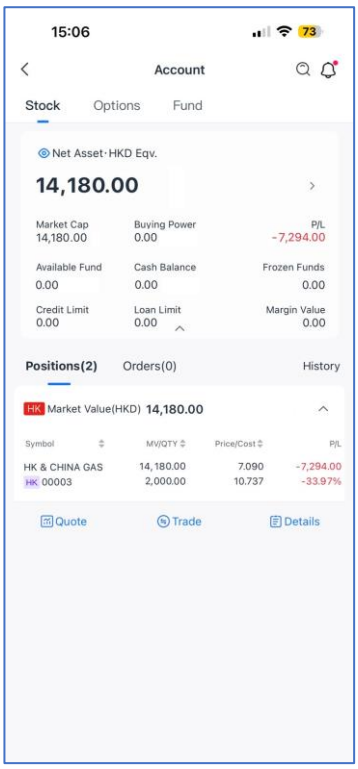
		

Account

3.1 Account Positions and Balances



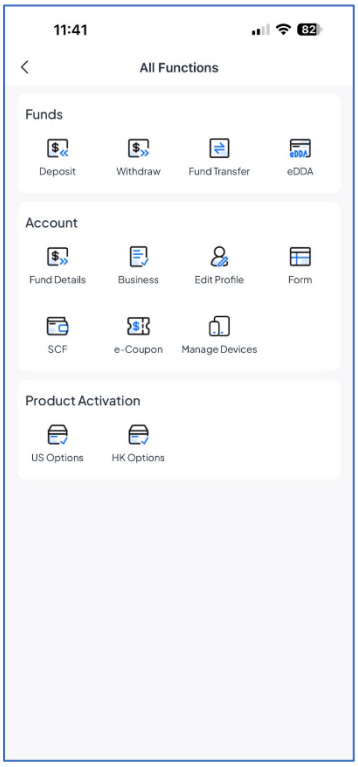
Total Net Asset(Eqv)	Total Net Asset represents the sum of cash balances across all products and the total market value of stock holdings, which is calculated based on current market prices. * Tap the Currency Code on the right to display your asset amounts in the selected currency equivalent. 
Stock Assets / Stock Options Assets	The sum of the cash balances for Hong Kong and Foreign Stock or Hong Kong and US Stock Options accounts, and the total market value of stock holdings calculated at current market prices.
Fund Assets	Clients can view the past year's returns for the Phillip HKD Money Market Fund in this section if they have joined the Surplus Cash Facility service. 



Net Asset	The total combined value of cash balances and stock market value. * Tap the Net Asset amount to view Fund Details.
Market Cap	The total market value of all stock holdings.
Buying Power	The sum of Cash Balance and Credit Limit.
P/L	P/L Represents the current profit or loss from the stock positions.
Available Fund	「Cash Account」: Cash Balance 「Margin Account」: Cash Balance + Margin Value (up to Loan Limit) + Credit Limit
Cash Balance	The total amount of cash in the stock account.
Frozen Funds	The fund temporarily locked by the system when a buy order is pending.
Credit Limit	The maximum overdraft or credit line extended to the account.
Loan Limit	The maximum financing amount of the account.
Margin Value	The total collateral value of your eligible stock holdings.

All Functions

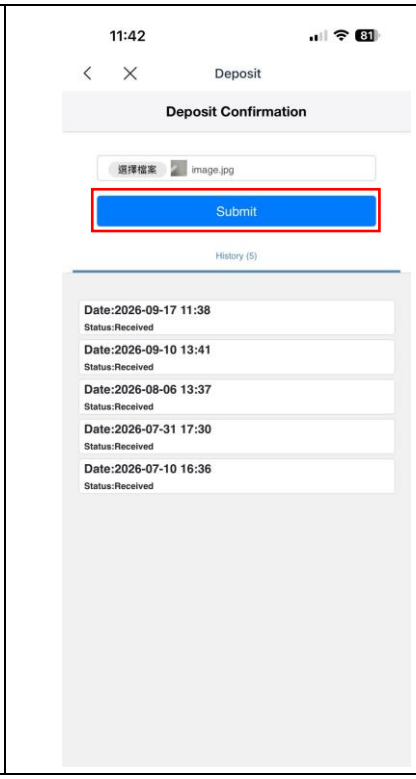
Navigate to the “Account” page and tap “More” to access various services, such as deposits and withdrawals, fund transfers, personal information updates, and service applications.



Deposit

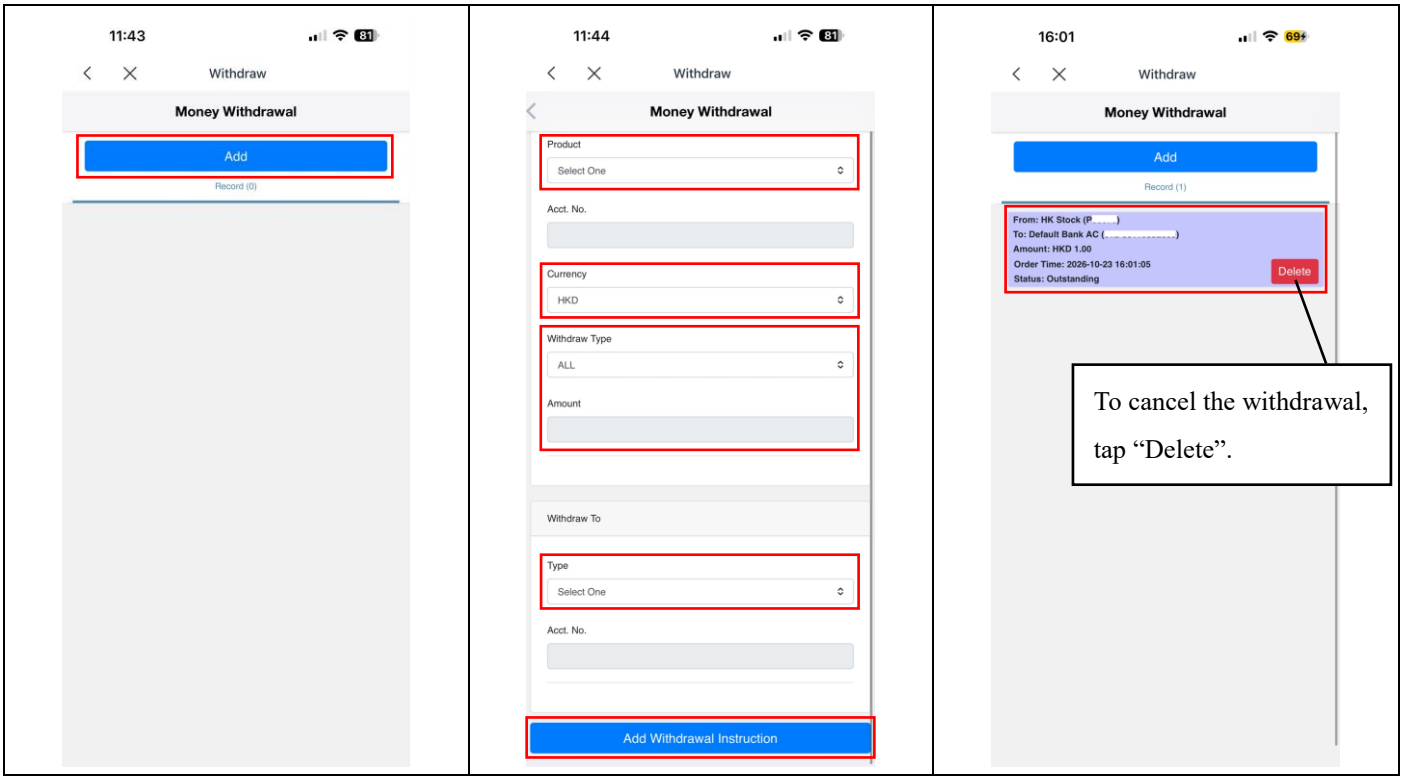
Select the file or take a photo of the deposit slip > Tap “Submit” > Check status and time once uploaded





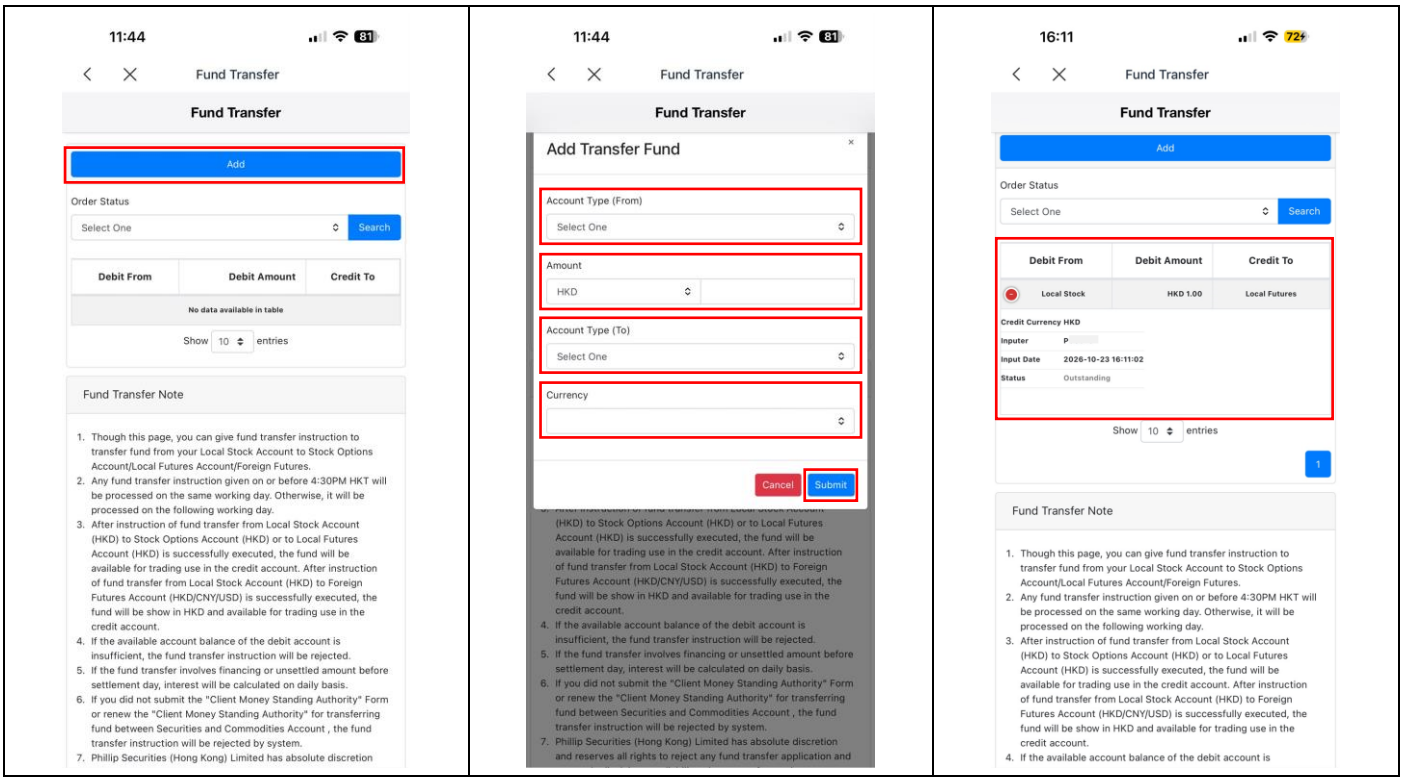
Withdraw

Tap “Add” > Select Product/ Currency/ Withdrawal Amount/ Receiving Bank Account > Tap “Add Withdrawal Instruction” > Withdrawal details and status will show once submitted



Fund Transfer

Tap “Add” > Select Account Type/ Currency/ Amount and tap “Submit” > Check order details and status

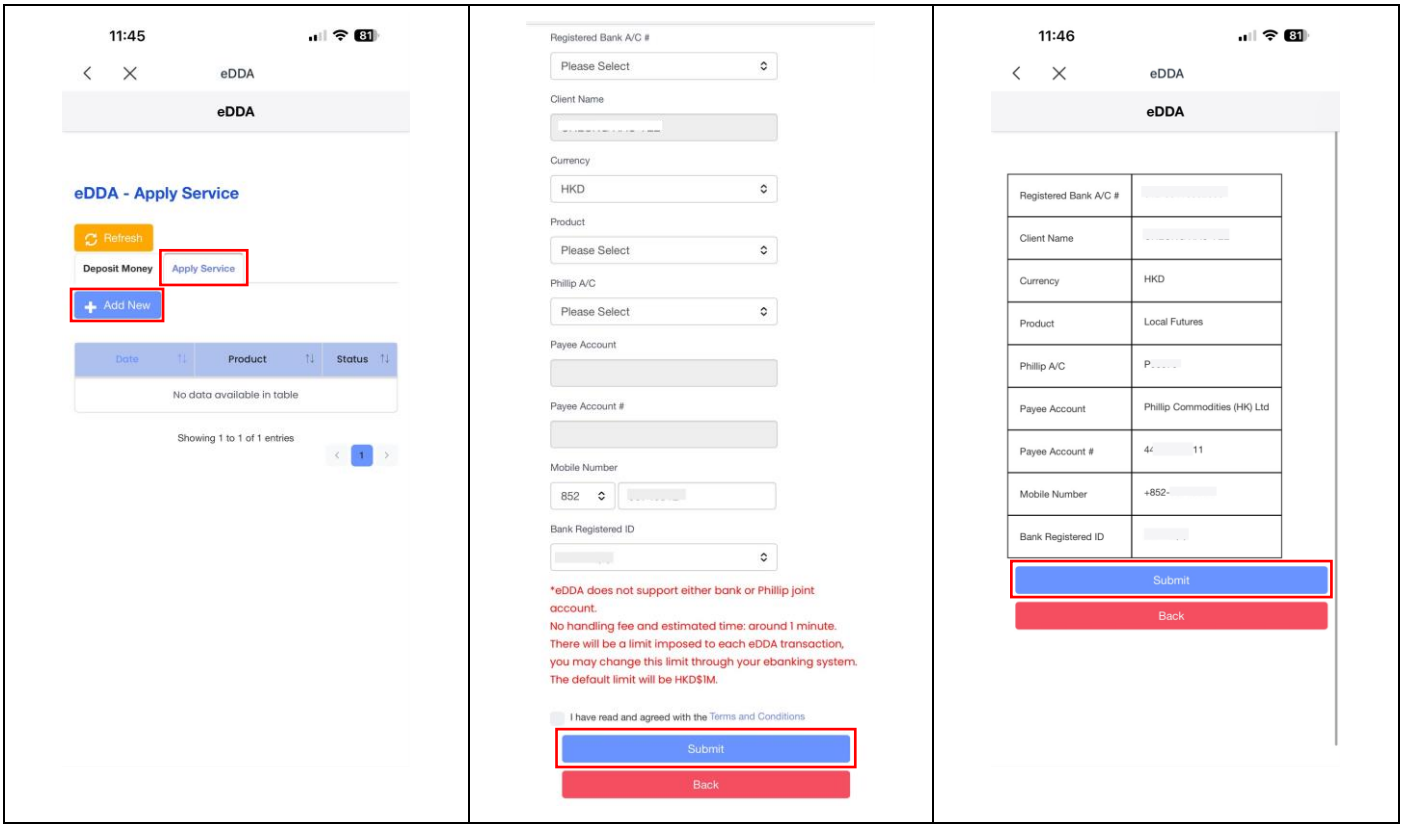


eDDA

Prior to the first use, you must activate the eDDA service. Once activated, you can use eDDA for instant deposits.

「Activate eDDA Service」

Tap "Apply Service" > Add New > Enter application details as required > Confirm Terms & Conditions > Submit > Confirm application details and tap "Submit" again



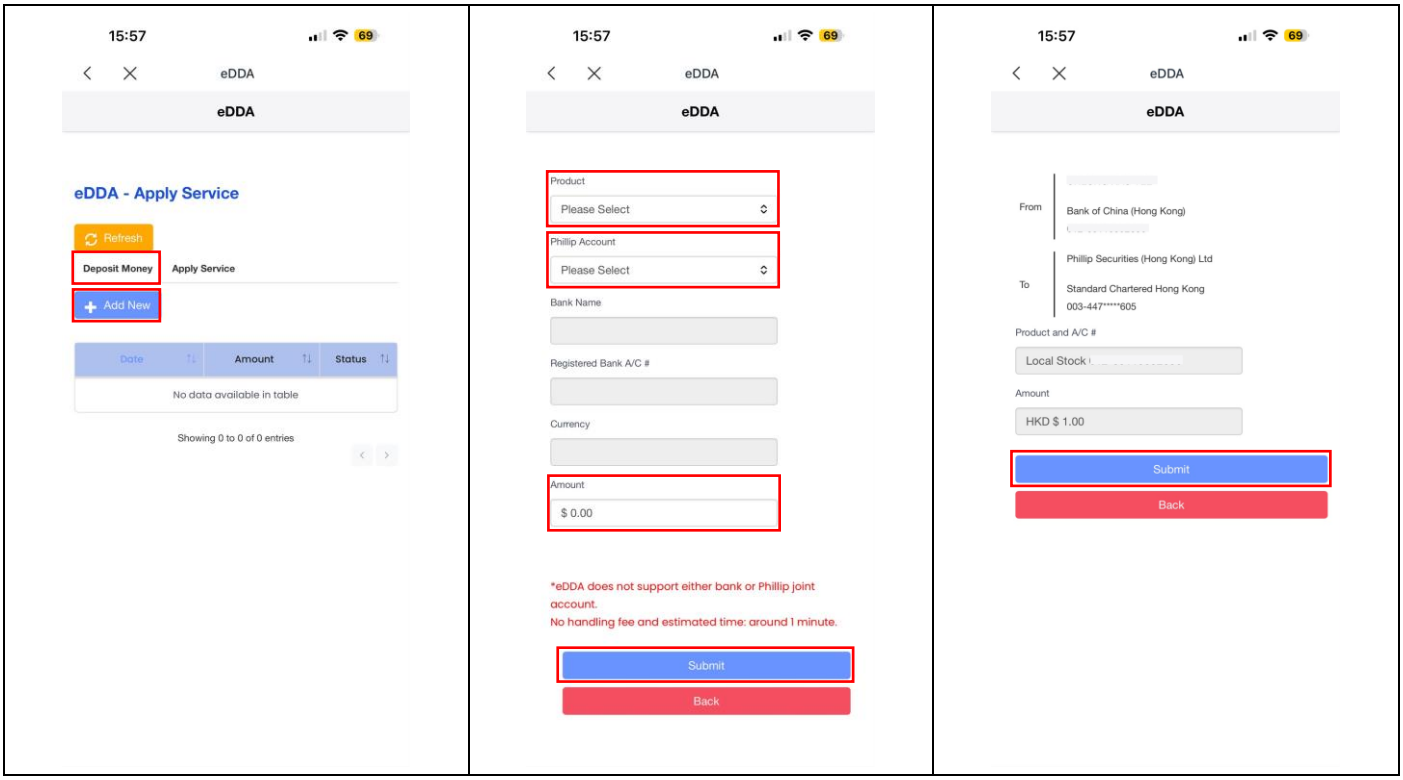
After submission, return to the "Apply Service" tab to view your new application record.

Please note the following status indicators:

Active	The eDDA has been set up successfully, you may now start making a deposit through eDDA to your Phillip account.
Pending	The instruction will be effective shortly (Subject to the processing time of designated bank). Please wait patiently.
Reject	The eDDA cannot be set up, please try it again or contact Customer Service Department at 2277 6555 for more information.
Cancel	The eDDA has been cancelled.

「Deposit via eDDA」

Tap “Deposit Money” > Add New > Complete the deposit information > Submit > Confirm deposit information and tap “Submit” again



After submission, return to the “Deposit Money” tab to view your deposit record. You may click “Refresh” to update the status of your eDDA.

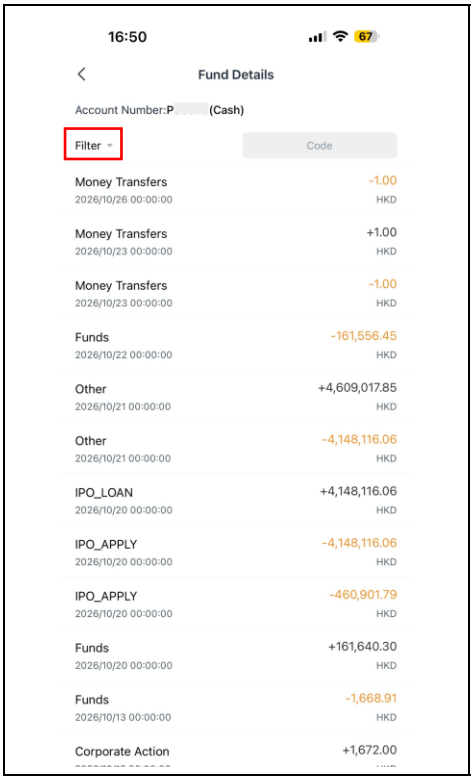
Below is a list of possible status:

Active	The amount has been deposit to Phillip successfully. You may now start trading with the funds.
Pending	The deposit is being processed. Please wait patiently.
Reject	The deposit cannot be transferred to Phillip, please try it again or contact Customer Service Department at 2277 6555 for more information.

Fund Details

View account's transaction history to track cash movements, including deposits, withdrawals, trading, IPO subscriptions, corporate actions, and more.

Tap the “Filter” button and select Date, Currency, Direction, and Type to narrow down the viewable range.





Business

You can apply for various services in “Business”. These include enabling alternative electronic trading systems, updating risk tolerance profiles, derivative knowledge, or W-8 forms, managing dividends and rights issues, and activating trading access for foreign stocks.

Edit Profile

You can modify your personal information in “Edit Profile”. These include contact numbers, email address, mailing address, and more.

Form

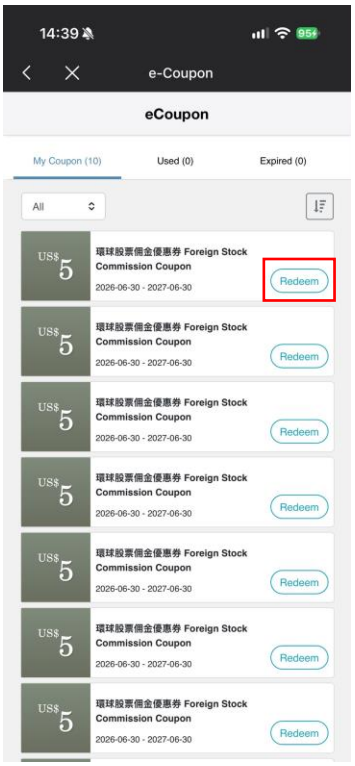
You can add and submit relevant forms in the “Form” section. If you cannot find the required form, please contact our Customer Service Department at (852) 2277 6555 or email cs@phillip.com.hk to obtain it.

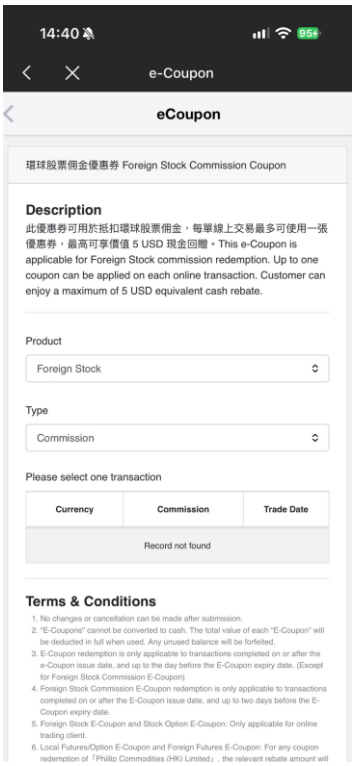
SCF

You can activate the “Surplus Cash Facility” service here. For more details, please visit:
https://www.poems.com.hk/en-us/product-and-service/surplus-cash-facility/main/

e-Coupon

Tap “Redeem” on the e-coupon you wish to use > Select Product and Type > Tap the transaction you want to apply the coupon to > Confirm to use the e-coupon > Redemption request submitted successfully





Notes:

* General commission or handling fee e-coupons can be used as early as the next business day after the transaction is completed and the statement is issued.
* Interest e-coupons are limited to a maximum of one use per type per month.
* The corresponding rebate amount will be displayed on the statement after the coupon is successfully applied.

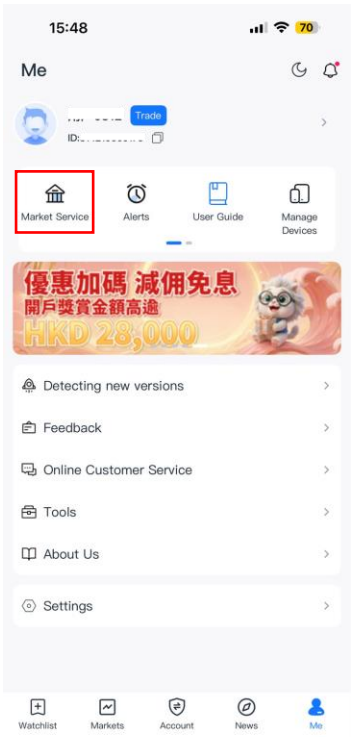
Product Activation

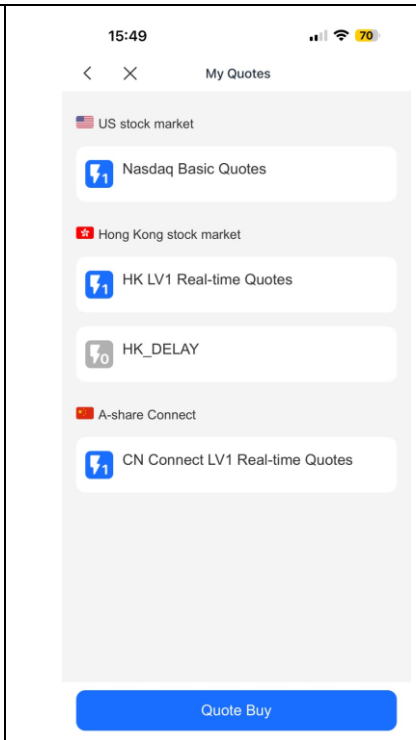
You can open additional product accounts in “Product Activation”. These include HK Stock Option, US Stock Option, Local Futures, Foreign Futures, Forex, and more.

Me

4.1 Market Service

Subscribe to market data services and check your activated market data status.



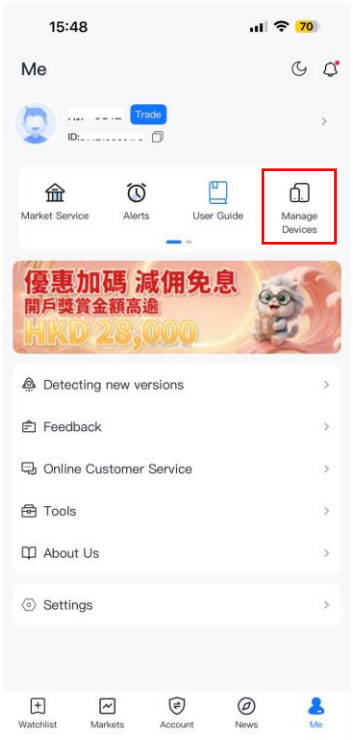


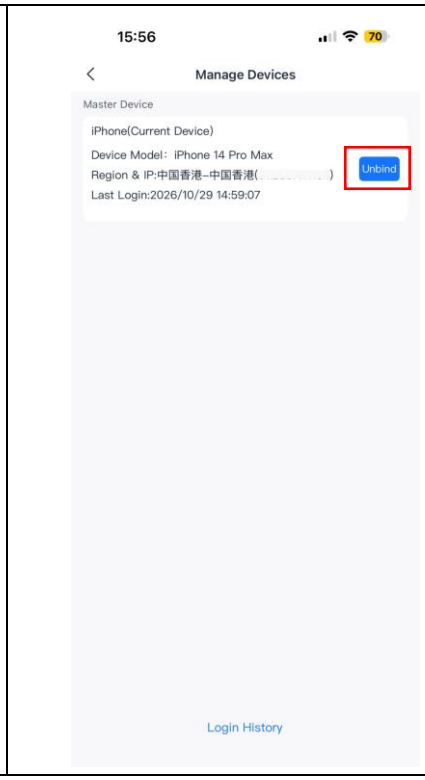
4.2 Manage Devices

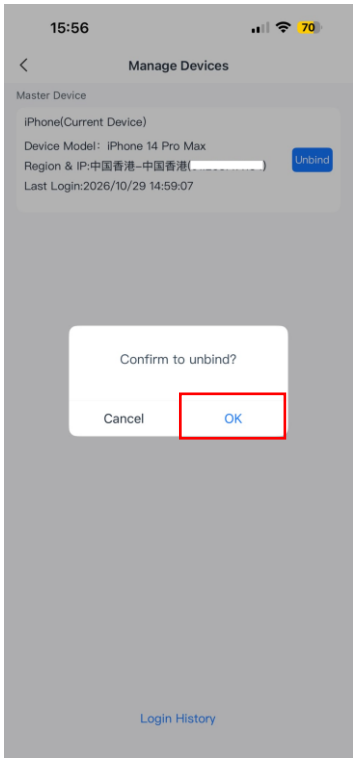
You can log in to a new device using one of the following two methods:

Method 1: Unbind current device

Manage Devices > Tap “Unbind” on your current device > Confirm to unbind > Once unbound, you will be automatically logged out of the current device > Log in on the new device to re-bind

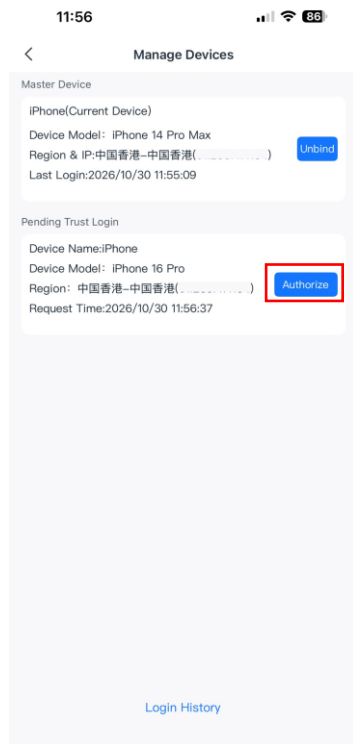


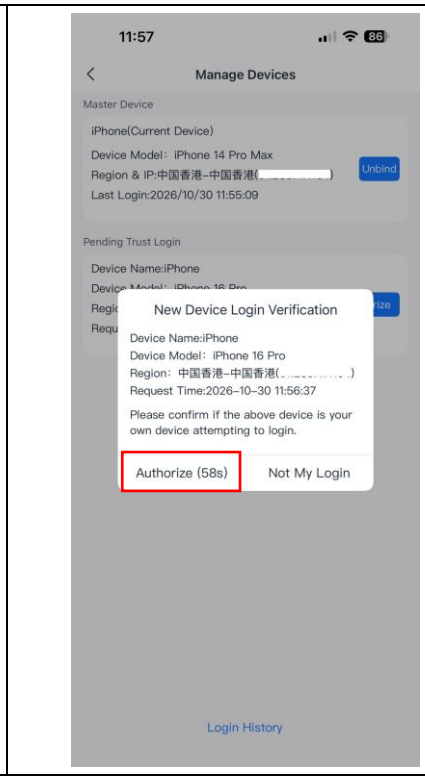




Method 2: Authorized device

Log in on new device > Tap “Authorize” on Master Device > Enter SMS verification code on new device







4.3 Tools

If you encounter any issues, please tap 'Diagnose network' and 'Upload Log'

