Stockbroking Pro platform

Platform quick guide

This concise guide has been put together to help you quickly familiarise yourself with the many features and tools available on the Bendigo Invest Direct Pro Platform.

Learn where to find products to trade or invest in, access market news, how to access charts, place different types of orders, monitor positions and more.

Bendigo Invest Direct

Bendigo Invest Direct Pro platform

This quick guide will help you get to know the following features:

1. Navigation tool bar and account

2. Product library

3. Dropdown menu navigation

4. Placing an order

5. Algorithmic trading

6. Your account module

7. Your options account

8. International share trading

9. Margin loan

10. Watchlists

11. Advanced charting

12. Stock-specific market information

13. Module linking

14. Market pulse and trading tools

15. Settings

16. Handy hints

1. Navigation toolbar and account

Access our advanced tools and features, switch layouts, set preferences and monitor your account
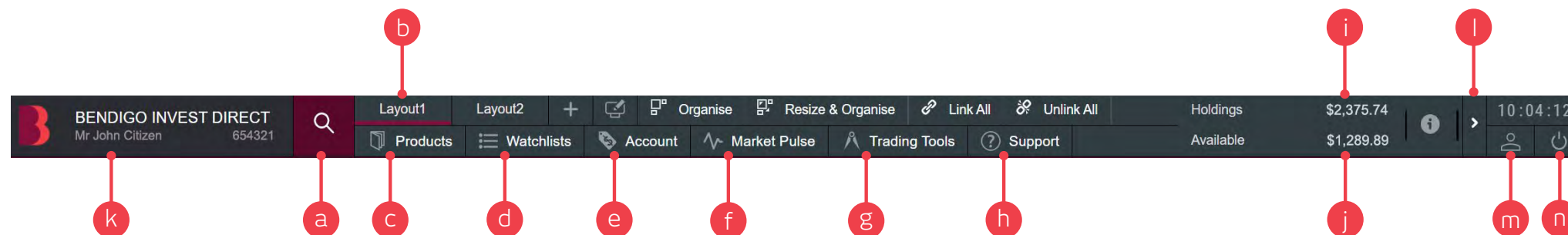

a. Enter a stock code or name in the 'Quick Search' field

b. Switch between different saved screen layouts. Click the layout name to rename your layout, or hover over the layout name to access further layout options.

c. Open the product library to search for and filter the products you want to trade or invest in

d. Open an existing watchlist or create a new one

e. Manage your existing positions and orders, view your trading history, confirmations, statements and access the Options analytics tool

f. Get the latest market information with our market pulse tools, including ASX announcements and Reuters news

g. Access a range of our trading tools, including a number of alerts to help you identify trading opportunities

h. Access our standard platform, account forms, platform tour videos and user guides, contact details and terms of use.

i. The current value of your holdings

j. Funds available to place an order

k. Your currently selected account number and name. Click here to select a different trading account

l. Hide the account value details

m. Access preferences and settings

n. Securely log out of the platform

2. Product library

Use the search and filter functions in the product library to find the products you want to trade

a. Type in the name of the product you want to search for

b. Filter by the class of an instrument, including Equities, Exchange Traded Products, Warrants and Interest Rate Securities

c. Filter products by sector, industry group, derivative issuer or series

d. Click on a product's bid or offer price to open an order ticket

e. For international shares, we have included a new country filter when selecting Equities

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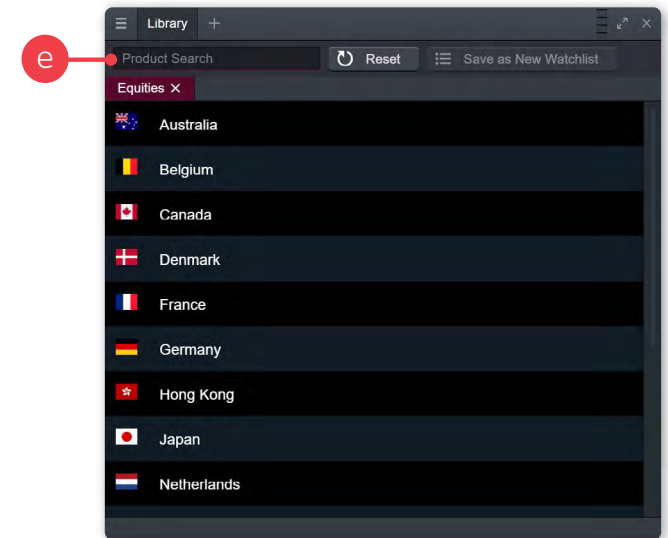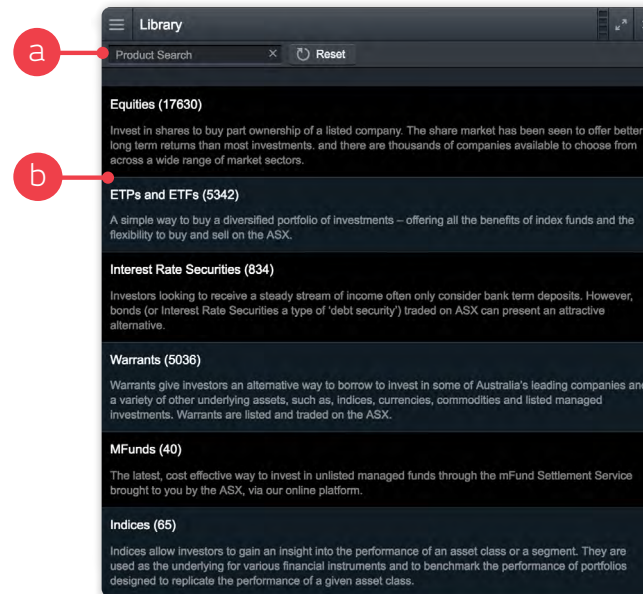
3. Dropdown menu navigation

Click the dropdown menu icon next to a product name to unlock product-specific options

a. Open a new order ticket for the product

b. Create a new alert

c. Add this product to one of your watchlists or create a new one

d. Open a new chart

e. View important general information on the company selected

f. View a quote panel

g. Open a depth window

h. Open a course of sales window

i. View the full price history

j. View Reuters news articles related to the company

k. View recent ASX announcements issued by the company

l. View fundamental research from theScreener

m. View Morningstar's Quantitative Equity Research report

n. View all related Warrants for the product by expiry, type and strike

o. View Options Finder for this product. This drop down menu is applied across all traders using ETOs, Equity ETOs and ETF ETOs

p. View all Interest Rate Securities associated
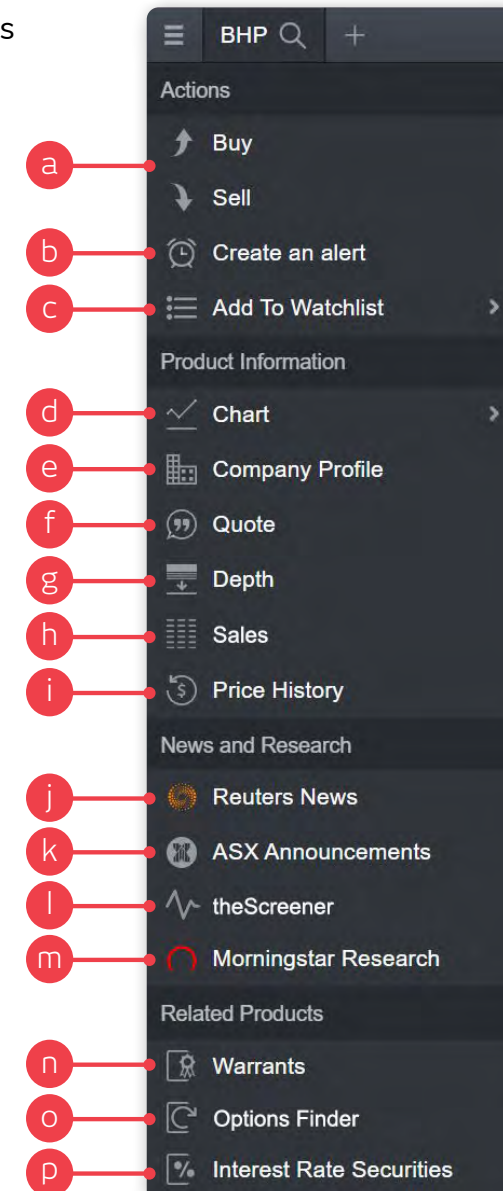
4. Place an order

Click any buy or sell price on the platform to launch an order ticket

a. View the last traded price, current bid and offer prices, as well as depth or course of sales on the order ticket

b. Click on the bid, offer or last price to pre-fill the 'Limit Price' field

c. Click the buy or sell button to change the order type

d. Enter the quantity or $ amount you wish to buy or sell

e. Select the order instructions – choose between 'Limit' or 'Market'. Another optional order instruction is to use algorithmic trading. You will first need to enable the feature. (See page 7)

f. Add an optional condition to the order, e.g. buy if the price is at or below $x.xx or volume traded for the day reaches a certain level or the stock has traded a minimum volume. For volume based conditions, we have moved the Conditions entry field into a separate section of the order ticket

g. Select an expiry – 'Good Till Cancelled' (GTC), 'Day Only' or a specific date

h. Add a stop loss order to protect against adverse price movements

i. Add a take profit so that you can automatically exit your position when an advantageous price is reached

j. Stop loss and take profit orders can be 'limit', 'market' or 'trailing'

k. Account selector - If multiple accounts are attached to a log in, then when you select the drop down menu in the top left corner, a new drop down appears at the top of the order ticket

l. View the estimated brokerage including fees and total cost of the order (buy trade), or total return (sell trade)

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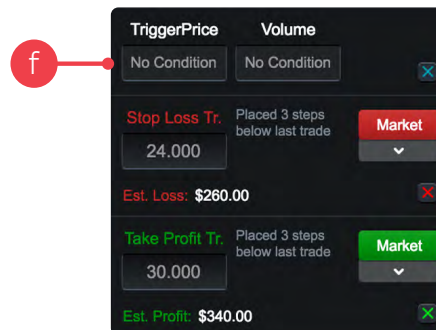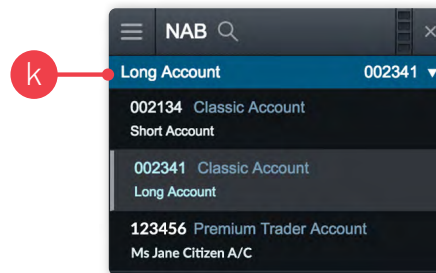
5. Algorithmic Trading

Our algorithmic trading strategies allow you to execute orders using automated pre-programmed trading instructions, which account for various criteria including price, time, volume and, quantity.

We offer a range of advanced algorithmic order types, including time-weighted average price (TWAP), volume-weighted average price (VWAP), Target Open and, Target Close. You will first need to enable this feature, via the "Not Enabled?" link on the order instruction dropdown.

a. Enter the stock you want to trade (Note: algorithmic trading is only available on the top 200 ASX-listed stocks)

b. Click the buy or sell button to change the order type

c. Enter the quantity or $ amount you wish to buy or sell

d. Select the algorithmic order instruction

e. Expiry is 'Day Only'

f. Select the start time. This is the time you specify for the algorithmic order to start trading in the market*

g. Select the end time. This is the time you specify for the algorithmic order to stop trading in the market*

h. Set your max volume (optional). This is the maximum percentage that your order can trade as a proportion of total market volumes*

i. Enter your 'I would' price (optional). This is the price at which your algorithmic order will exit the strategy and attempt to complete the order*

j. Estimated fees, click to expand

k. Enter trading PIN to place your order

*These fields are applicable for TWAP and VWAP instructions only. For Target Open and Target Close instructions, fields (f-i) will not appear on the ticket.

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6. Your Account Module

6.1 Positions

c Context menu

a. Change table settings, add, remove or rearrange data columns

b. Switch between the 'Positions', 'Orders', 'Profit & Loss', 'Profit & Loss' and 'History' tabs

c. View the product's context menu

d. Trade and pricing information

e. Market data from theScreener

f. Number of units held

Manage your existing positions and pending orders, and view your entire account history

6.2 Orders

a. The status of your order

b. Quantity that has been filled, or that is unfilled and still on the market

c. Stop loss and take profit instructions

d. Modify or cancel the order via the buttons

6.3 Profit & Loss

View and edit the quantity and average entry price of all holdings and see real-time profit or loss data for all your holdings.
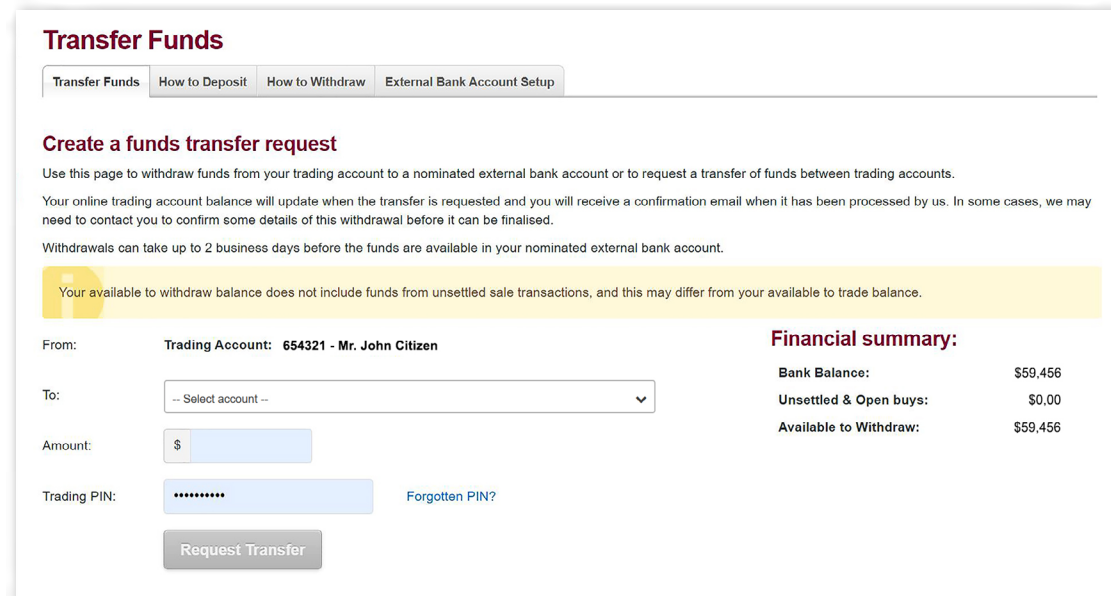

6.4 History

This module provides you with a line-by-line history of all orders, as well as any online receipts or invoices and alerts. Click the pop-out icon to view the full details of an entry.
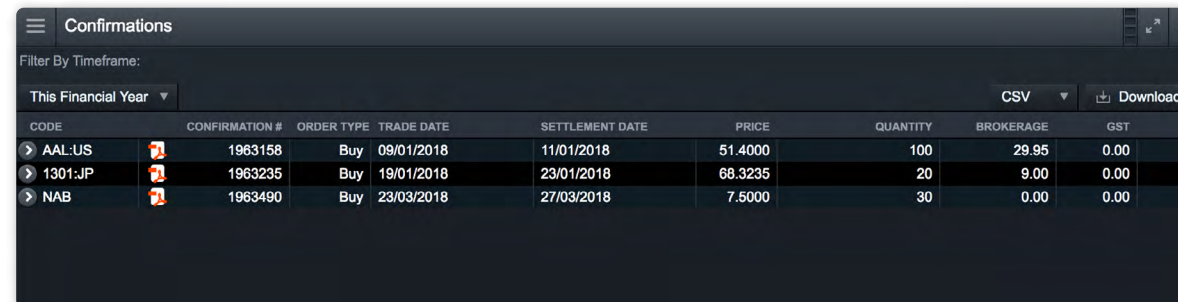
6.5 Transfer funds

Request funds transfer between trading accounts, or to external linked bank accounts. Simply select 'Account' then 'Transfer Funds', this module will then open in our Standard platform

Transfer Funds
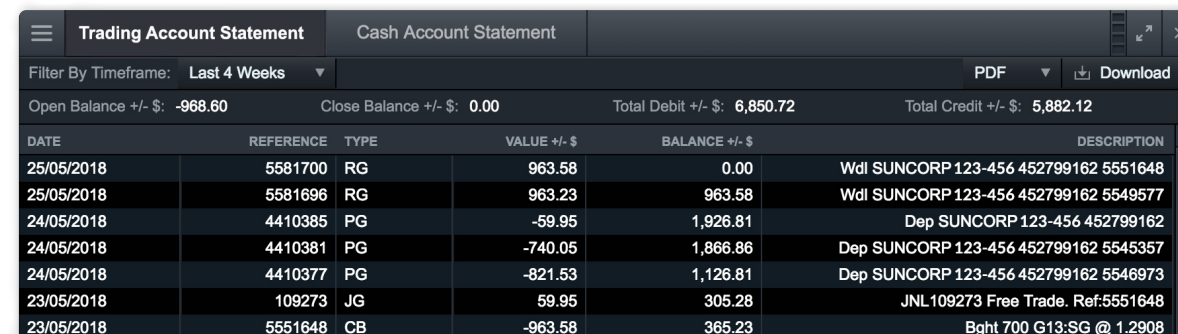
| Transfer Funds | How to Deposit | How to Withdraw | External Bank Account Setup |

Create a funds transfer request

Use this page to withdraw funds from your trading account to a nominated external bank account or to request a transfer of funds between trading accounts.

Your online trading account balance will update when the transfer is requested and you will receive a confirmation email when it has been processed by us. In some cases, we may need to contact you to confirm some details of this withdrawal before it can be finalised.

Withdrawals can take up to 2 business days before the funds are available in your nominated external bank account.

Your available to withdraw balance does not include funds from unsettled sale transactions, and this may differ from your available to trade balance.

From:	Trading Account: 654321 - Mr. John Citizen		**Financial summary:**	
To:	-- Select account --		Bank Balance:	$59,456
			Unsettled & Open buys:	$0.00
Amount:	$		Available to Withdraw:	$59,456
Trading PIN:	••••••••••	Forgotten PIN?		

Request Transfer

6.6 Confirmations

View and download all options trade confirmations by selecting 'Account' and then 'Options confirmations'. This module will then open in our Standard platform

Confirmations

Filter By Timeframe:

This Financial Year ▼

CSV ▼ | ⬇ Download

CODE		CONFIRMATION #	ORDER TYPE	TRADE DATE	SETTLEMENT DATE	PRICE	QUANTITY	BROKERAGE	GST
❯ AAL:US		1963158	Buy	09/01/2018	11/01/2018	51.4000	100	29.95	0.00
❯ 1301:JP		1963235	Buy	19/01/2018	23/01/2018	68.3235	20	9.00	0.00
❯ NAB		1963490	Buy	23/03/2018	27/03/2018	7.5000	30	0.00	0.00

6.7 Statements

View and download full trading account by selecting 'Account' then 'Statements'

Trading Account Statement | Cash Account Statement

Filter By Timeframe: Last 4 Weeks ▼

PDF ▼ | ⬇ Download

Open Balance +/- $: **-968.60** Close Balance +/- $: **0.00** Total Debit +/- $: **6,850.72** Total Credit +/- $: **5,882.12**

| DATE	REFERENCE	TYPE	VALUE +/- $	BALANCE +/- $	DESCRIPTION
25/05/2018	5581700	RG	963.58	0.00	Wdl SUNCORP 123-456 452799162 5551648
25/05/2018	5581696	RG	963.23	963.58	Wdl SUNCORP 123-456 452799162 5549577
24/05/2018	4410385	PG	-59.95	1,926.81	Dep SUNCORP 123-456 452799162
24/05/2018	4410381	PG	-740.05	1,866.86	Dep SUNCORP 123-456 452799162 5545357
24/05/2018	4410377	PG	-821.53	1,126.81	Dep SUNCORP 123-456 452799162 5546973
23/05/2018	109273	JG	59.95	305.28	JNL109273 Free Trade. Ref:5551648
23/05/2018	5551648	CB	-963.58	365.23	Bght 700 G13:SG @ 1.2908

7. Your options account

Locate the options finder tool by selecting from the dropdown next to a stock code.

This tool allows you to filter and build out your options strategies.
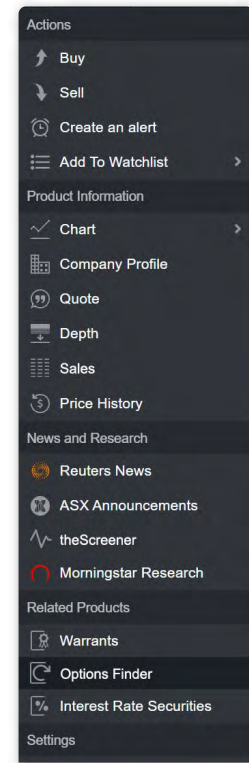
a. Enter the stock code to the underlying options security

b. Select from the list of pre-determined strategies

c. Select the expiry date from the menu

d. Select between American or European options

e. Select the number of strikes you want to display

f. You can refresh your settings with one click

g. Strike price is displayed

h. Enter number of contracts you wish to trade

i. If trading a Buy write, the underlying stock price will be displayed

j. Your estimated premium will display

k. Confirm your strategy by clicking 'Trade Strategy'

l. View underlying quote bar including dividend yield, historical and volume volatility

m. View selected 'Calls'

n. View selects 'Puts'

When placing an options trade, use the real time pay off diagram to help assess the strategy.

Once your strategy is complete, you can place a trade using the same module.
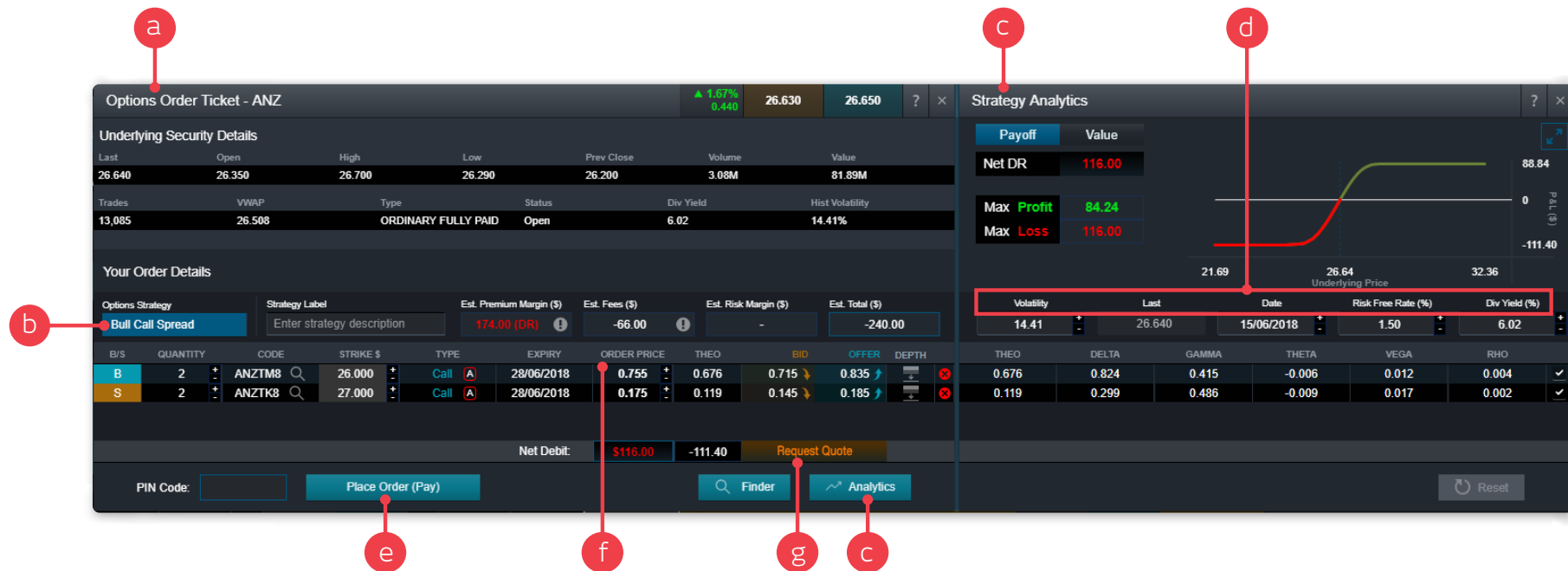
a. After selecting your strategy on the options finder tool you will be able to place a trade

b. Your strategy will display on the order ticket

c. Use the real time pay off diagram to analyse your chosen strategy

d. Change the Volatility, Date, Risk Free Rate and Dividend Yield to assess the strategy with different valuation parameters

e. Once you've completed the setup of your strategy, click 'Place order'

f. Adjust the order price for each leg of the strategy

g. Click Request For Quote (RFQ) to request Market Makers to provide a bid and offer price that they would be willing to trade at.

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8. International share trading

Click any buy or sell price on the platform to launch the order ticket

a. Enter the international stock you want to trade

b. Click the buy or sell button to change the order type

c. Enter the quantity you wish to buy or sell

d. Select the order instructions - 'Limit price'

e. Select an expiry for your order – 'Day Only'

f. Estimated fees, click to expand

g. FX buffer rate – this is applied to buy orders only at the time of placement to protect against currency movements. Any excess buffer will be unlocked on order execution

h. Enter trading PIN to place your order

Order instructions:

Limit price – A maximum price on a buy order or a minimum price on a sell order. If the market doesn't reach the set price, the order won't be executed

Expiry definitions:

Day Only – This type of order will expire at the end of the day if it has not filled
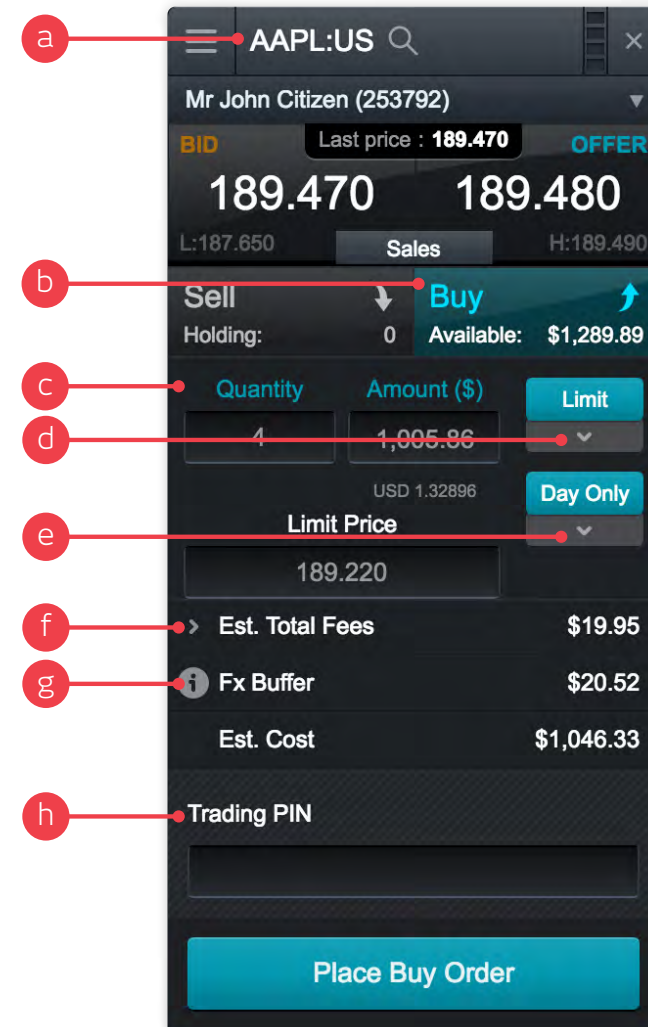
9. Margin Loan

Trade online in real-time using a margin loan from a linked margin lending account

Your margin loan is fully accessible on the Pro platform. You can view your current loan details, investments and collateral, as well as trade online with authorisation from your margin lender provided in real-time.

a. When you select an account with margin loans enabled, you can access the 'Margin loans' module from the Account menu

b. Key loan details are provided at the top of the module. This data is provided in real-time by your margin lender

c. View a list of current investments, with lending values and ratios

d. View any collateral lodged with your margin lender

e. View details of managed funds held on your margin loan

f. View examples of your borrowing power at different lending ratios

CODE ↕	DESCRIPTION	PRICE ($)	UNITS	MKT VALUE ($)	LEND. RATIO (%)	LEND. VALUE
BEN	Bendigo & Adel. Bank	13.00	900	11,700.00	75	8,775.00
MGE	Magellan Global Eqt	2.69	5,000	13,450.00	65	8,742.50
NAB	National Aust Bank	33.91	324	10,986.84	75	8,240.13
QUB	Qube Holdings Ltd	2.44	5,000	12,200.00	65	7,930.00
TLS	Telstra Corp Ltd	6.39	1,500	9,585.00	80	7,668.00
WOW	Woolworths Ltd	27.83	250	6,957.50	80	5,566.00
Totals:			12,974	64,879.34		46,921.63

10. Watchlists

Create watchlists containing your preferred products to watch and respond to market movements

a. **Create a new Watchlist**, then add products using their dropdown menus or simply drag and drop a product onto the watchlist module

b. Use the 'Settings' menu item to rename the watchlist or change the colour of the module. Use 'Table Settings' to add, remove or re-order data columns

c. Sort watchlists by code, name (if selected in options), or price

d. Click a bid or offer price to open an order ticket

e. Add purchase details, this is useful for tracking real purchases or 'what if?' scenarios

f. Add products quickly, just hit '+' and start typing to find the stock

11. Advanced charting

a. Charts include 97 indicators, 39 drawing tools and pattern recognition scanner

b. You can set individual intervals, timeframe, drawing tools and technicals as favourites

　i. Quick links to these favourites are then added to the chart interface for easy access

c. Save up to five chart presets. We will automatically save the first chart that you open for a product into saved chart position 1. To open multiple saved charts for the same product you simply select the desired saved chart through the products context menu

d. Display volume with the ability to add a number of volume indicators:

　i. Volume by price

　ii. Price volume trend

　iii. Volume flow

　iv. Volume accumulator

　v. Volume oscillator

e. The Pro platform will automatically save any chart analysis so when you close a chart down and reopen it, it will look exactly the same as you left it

f. You have the ability to fully customise the colours of all features, including background colour by selecting 'Settings' in the top right corner, and then save this as default
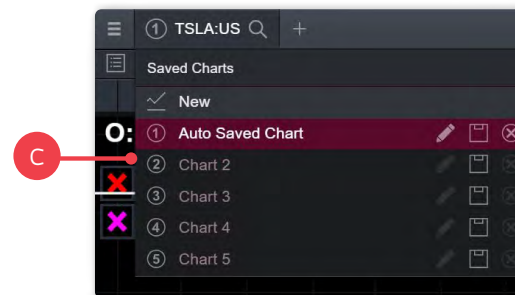
Comparison Charts
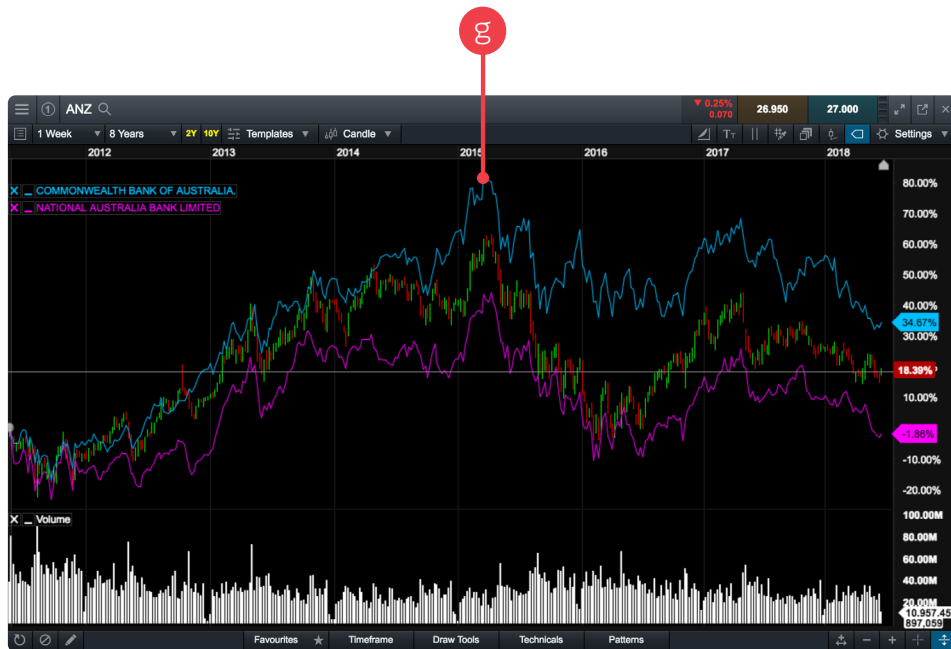
g. Compare the price action of multiple products on one chart. Simply drag and drop a product from your Watchlist into the price action area of any open chart and release

h. To display relative performance, change the Axis Style to 'linear' and the chart will update accordingly. This display shows multiple price axes on the right hand side

12. Stock-specific market information

Stock-specific modules give you the full picture on any product that you select. By using module linking you will be able to switch between your favorite products with speed and ease.
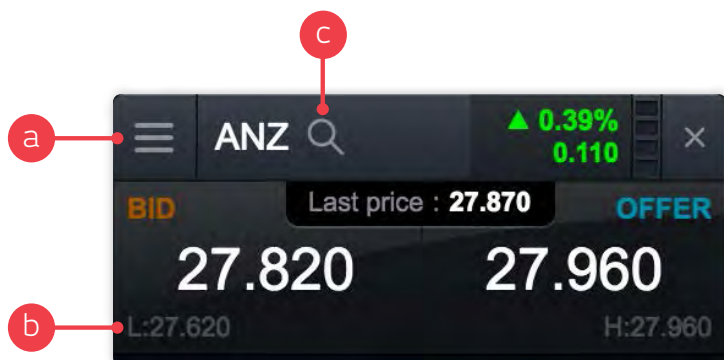
12.1 Quote Panels

a. Drag a product out of a module, use the product context menu or use the quick search field in the header to open a quote panel

b. View current bid and offer, last price, and high and low prices for the day as well as daily performance values

c. Use the magnifying glass to change the stock code
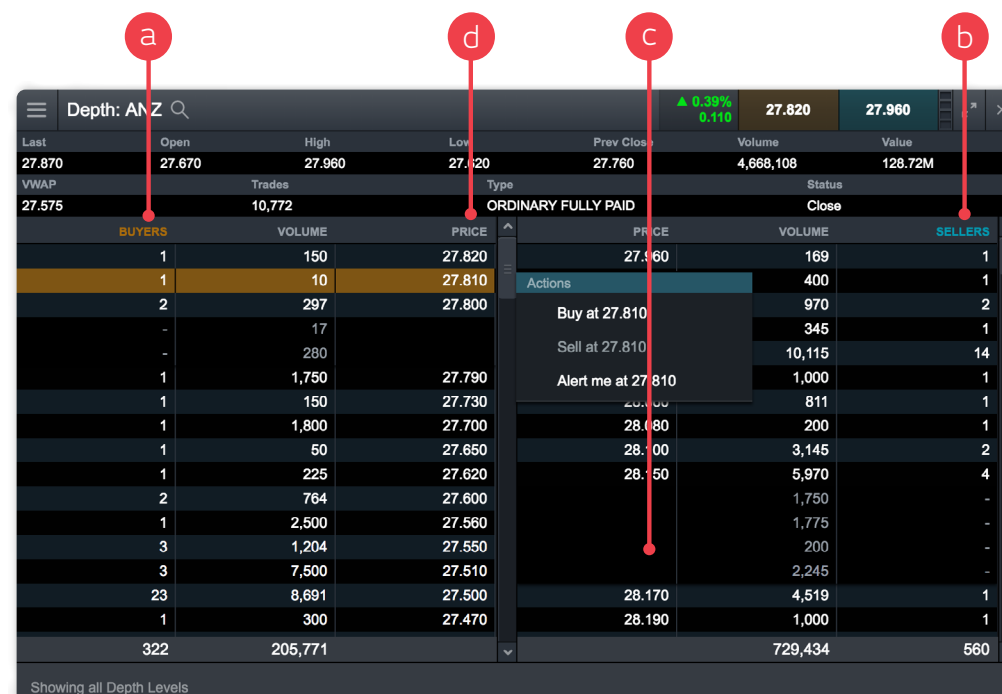
12.2 Depth
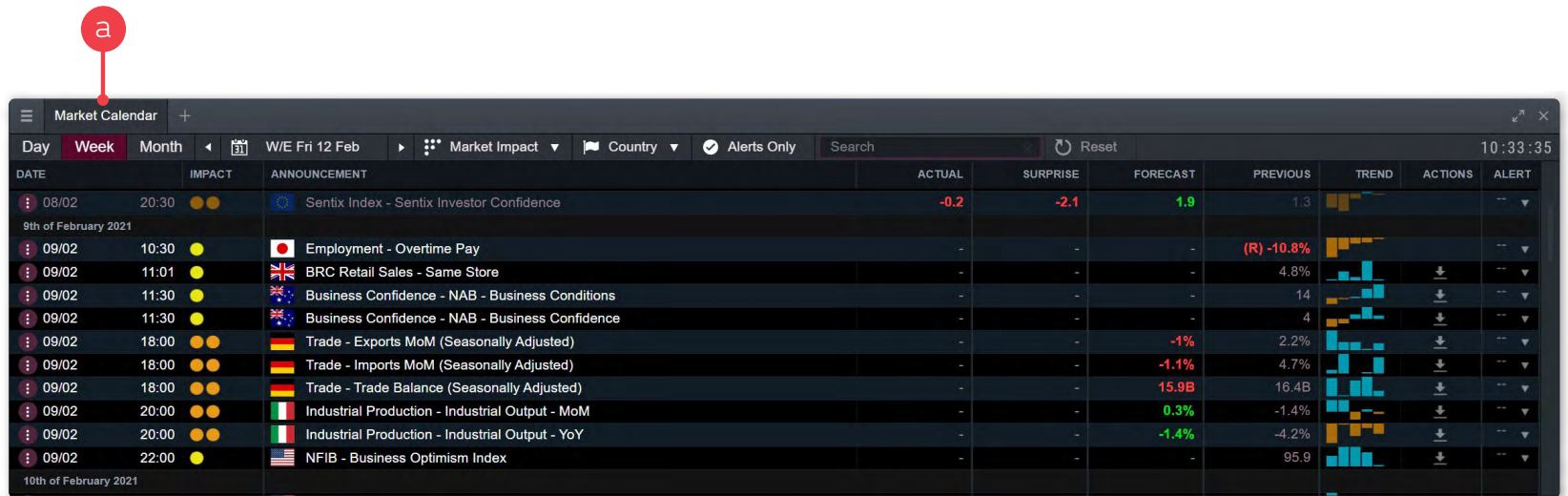
You can view the market depth of a stock by selecting the 'Depth' option from the context menu

a. All buyers at all price levels

b. All sellers at all price levels

c. Click a price to expand and see details of individual orders at that price level

d. Price of stock in the market

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12.3 Market Calendar

a. Use the Market Calendar to view the latest economic data releases from across the globe and set reminders for future updates. You can find the market calendar under the 'Market Pulse' menu

DATE		IMPACT	ANNOUNCEMENT	ACTUAL	SURPRISE	FORECAST	PREVIOUS	TREND	ACTIONS	ALERT
08/02	20:30	●●	Sentix Index - Sentix Investor Confidence	-0.2	-2.1	1.9	1.3			-- ▼
9th of February 2021										
09/02	10:30	●	Employment - Overtime Pay	-	-	-	(R) -10.8%			-- ▼
09/02	11:01	●	BRC Retail Sales - Same Store	-	-	-	4.8%		⬇	-- ▼
09/02	11:30	●	Business Confidence - NAB - Business Conditions	-	-	-	14		⬇	-- ▼
09/02	11:30	●	Business Confidence - NAB - Business Confidence	-	-	-	4		⬇	-- ▼
09/02	18:00	●●	Trade - Exports MoM (Seasonally Adjusted)	-	-	-1%	2.2%		⬇	-- ▼
09/02	18:00	●●	Trade - Imports MoM (Seasonally Adjusted)	-	-	-1.1%	4.7%		⬇	-- ▼
09/02	18:00	●●	Trade - Trade Balance (Seasonally Adjusted)	-	-	15.9B	16.4B		⬇	-- ▼
09/02	20:00	●●	Industrial Production - Industrial Output - MoM	-	-	0.3%	-1.4%		⬇	-- ▼
09/02	20:00	●●	Industrial Production - Industrial Output - YoY	-	-	-1.4%	-4.2%		⬇	-- ▼
09/02	22:00	●	NFIB - Business Optimism Index	-	-	-	95.9		⬇	-- ▼
10th of February 2021										

12.4 Sales

This module displays the 'course of sales' for the selected product. The course of sales can be viewed by selecting the 'Sales' option from the context menu

ANZ		
TIME	PRICE	QUANTITY
16:10:50	27.8700	1,329
16:10:50	27.8700	13,671
16:10:50	27.8700	15,000
16:10:50	27.8700	137
16:10:50	27.8700	1,773
16:10:50	27.8700	39
16:10:50	27.8700	9,381
16:10:50	27.8700	430
16:10:50	27.8700	6,079
16:10:50	27.8700	33,888
16:10:50	27.8700	222

12.5 Research

View upcoming dividends for all ASX-listed companies, including ex-dividend and pay dates, cents per share and franking percentage along with comprehensive fundamental research data

12.6 News and ASX announcements

These modules display Reuters news and all announcements released to the ASX. In order to make the information displayed here relevant to a product you are interested in, use the module linking function. You can also click on the pdf icon to launch more information

13. Module linking

a. Select a colour tile on multiple modules to link them together. Now if you change the stock code in one module, it will change for all the linked modules

14. Market pulse and trading tools

Get the latest news and configure alerts on your favourite products

a. The Alerts, Watchlists, Positions, Orders and P&L modules highlights if any news has been reported within the last 24 hours

b. View ASX Announcements as they are released to market. Select 'Market Pulse' then 'ASX Announcements'

c. 'Movers and Shakers' displays today's biggest movers. Select 'Market Pulse' then 'Movers and Shakers'

d. The Alerts module under 'Trading tools' allows you to set alerts based on price, volume, announcements or status, with alerts being sent by email or SMS

e. Alerts and order notifications will pop up on the platform as they are happen

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15. Settings

Configure your account and platform to suit your individual needs by using the inbuilt preferences and settings. To update your preference, go to the 'User preferences' menu on the top right corner of the platform and select 'Personal Details' option

a. Change your login code, password, email address or mobile phone number

b. Manage and opt-in to various Bendigo Invest Direct email communications

c. Manage your 'Market Data' package – select delayed, live (click to refresh) or dynamic (streaming) data

d. Change your trading pin on your account in this tab. You can also enable or disable your trading PIN. We recommend the use of a trading PIN for additional security, however we also give you the option to disable it if you wish

e. Select how long the platform should keep you logged in if you are not actively using it. Shorter periods are recommended for public computers, but you can choose whichever period best suits your needs

f. Set other preferences including personalisation of page refresh and audio notifications
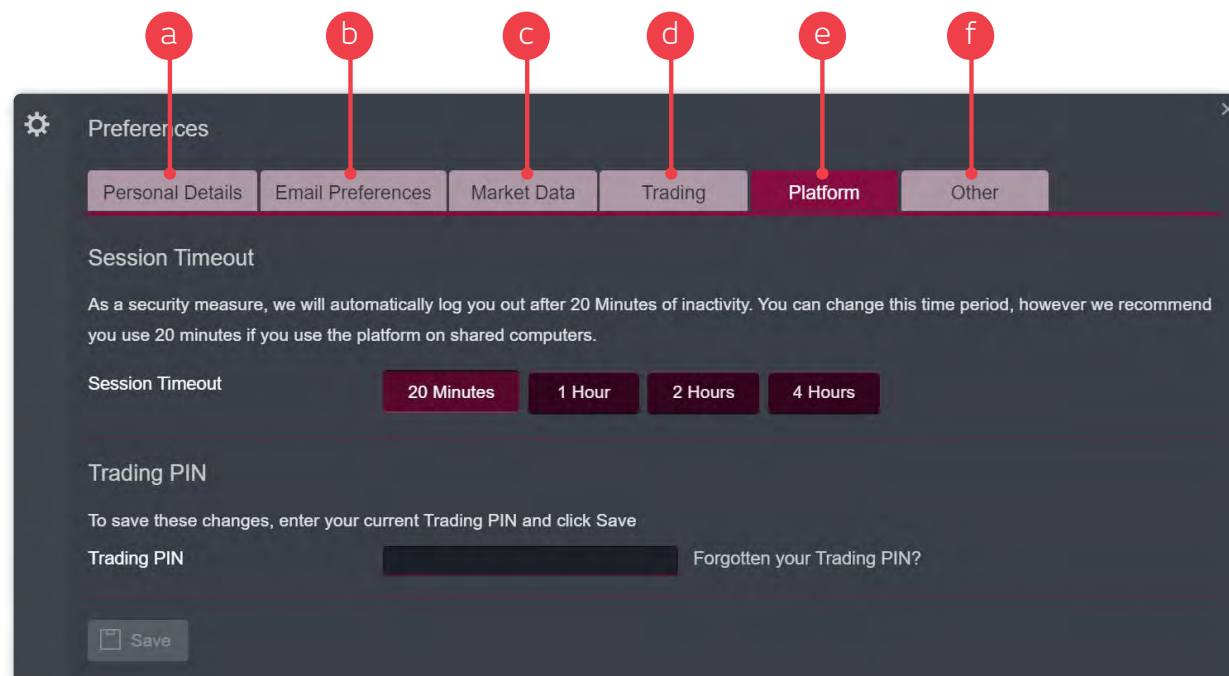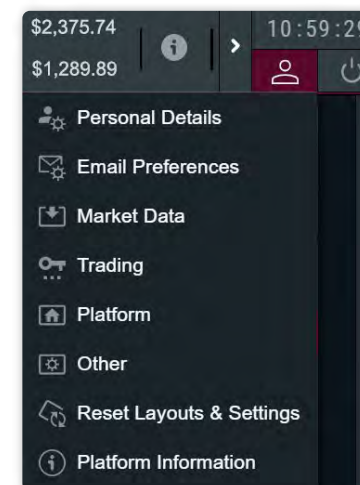
16. Handy hints

Additional features you can use to make the most of the platform like our platform guides and videos

a. 'Quick Search' provides an option to choose the default module (chart, ticket or quote panel) that is loaded when selecting a product

b. You can drag and drop a product into an existing watchlist, onto your platform screen to open a price quote window, or over an open chart to quickly change the product you are looking at

c. You can 'pop out' most modules from the platform to monitor or place trades while viewing other websites or applications

d. Double-click anywhere in the module headers to make the module go full screen (double click again to go back to the previous state)

e. Scan multiple products quickly over multiple chart intervals using the module linking feature, you can also simultaneously update modules including charts, order tickets and research on a single product

f. 'Organise' and 'Resize' layout options when opening a number of modules within the platform. This feature will organise your platform into a clean looking format either vertically or horizontally (whichever will fit your screen best)

g. Automatically save layout changes (enabled by default) and position new windows into gaps within the layout. Click the 'screen icon' to open 'Layout Selector'

h. You can add multiple modules to a single window to save space on your layouts. You can do this by clicking on the plus button next to the module name. You can add the Product Library, Charts, Watchlists, Account and Market Pulse options.

i. Learn more about our platform using the platform quick guides available under the Support menu

Bendigo Invest Direct