



KGI Power Trader - iPhone User Manual

Version 2.2
May 2025

Contents

1. Login Process	3
2. Home	6
2.1 More	7
2.1.1 Settings	8
2.1.2 Change Password	10
2.1.3 Device Management	11
2.1.4 Login Information.....	12
3. Quote	13
3.1 Detail Quote	13
3.1.1 US Share Quote and SH/SZ Connect Quote (Only for post-login).....	18
3.2 Reorder.....	20
3.3 Watchlist.....	21
4. Account	27
4.1 Menu Bar	27
4.2 Position.....	29
4.3 Order Book	31
4.4 Trade Summary.....	33
5. Trade	35
5.1 Stock Trade	35
6. Discover	43
7. Logout Procedure	43

1. Login Process

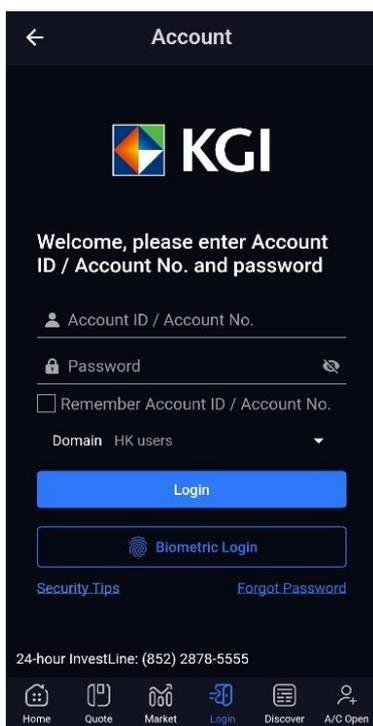
1. Download and install “KGI Power Trader” app, the icon will appear as below.



2. The following screen will appear after clicking the “KGI Power Trader” app icon



3. Click “Login” symbol, the below screen will appear.

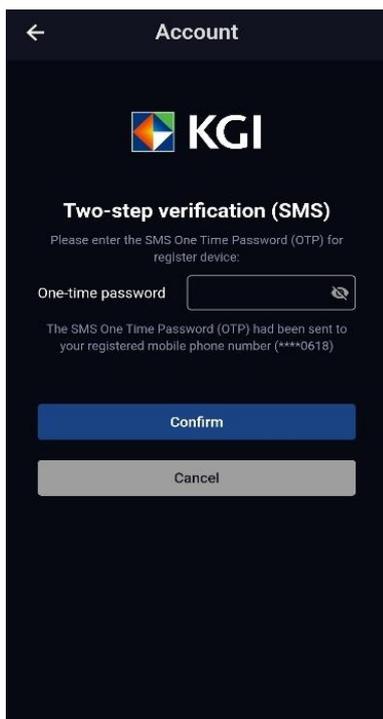


4. Enter your Account ID and Password, choose your Domain, then click [Login].

Note:

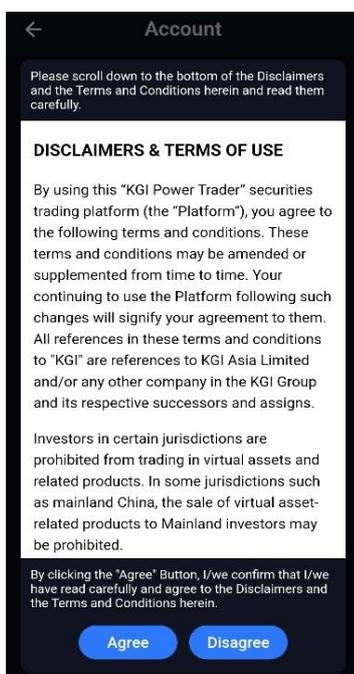
- You can check the box [Remember Account ID] to store your Account ID for your convenience.
- As “KGI Power Trader”, “WebTrade” and “WebTrade-Professional Version” share the same password, changing your password in any system will result in changing for all systems.

5. If you have not registered Two-Factor Authentication, then the below screen will appear after clicking [Login]



You will receive a one-time password via SMS to your registered mobile phone. Enter the one-time password to complete the Two-Factor Authentication and device registration. During the validation period, you are not required to register again if you use a registered device to login.

6. Upon successful login, the disclaimer will appear.

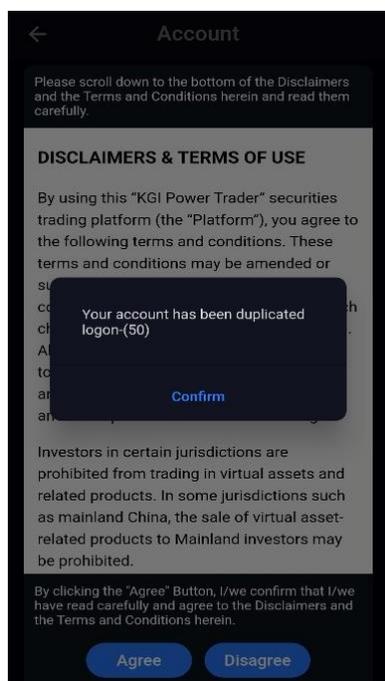


7. Read the disclaimer carefully and press [Agree] to enter the Home Menu.

8. It will be redirected to the Login Page if [Disagree] is selected.

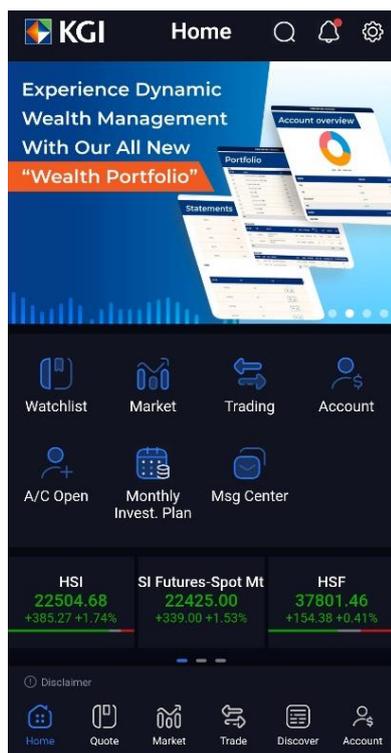
9. Duplicate Login

“KGI Power Trader” does not allow duplicate login. If you login more than one system simultaneously, you will be treated as duplicate login. The previously (logged in) system will be logged out automatically and you will receive the below duplicate login message.



2. Home

You can access to many functions of this app at the “Home”



“Watchlist” – You can set your frequently viewed stocks for monitoring

“Market” – You can view different markets information

“Trading” – Trade at anytime

“Account – You can view your account information, e.g. Positions and Cash Balance ”

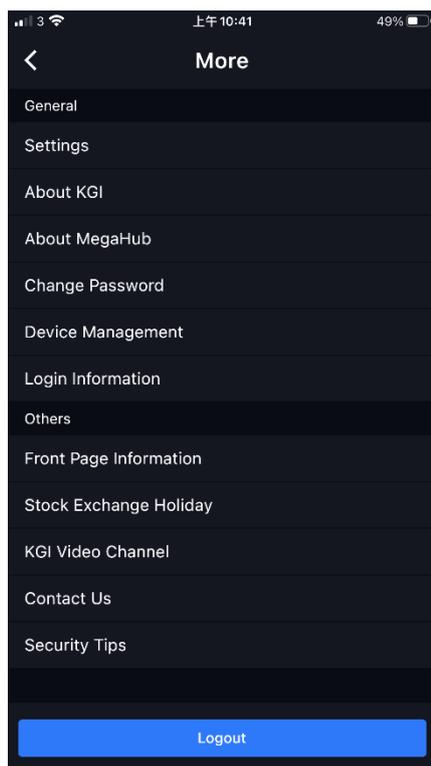
“Account Open” – You can open an account online

“Monthly Invest. Plan” – You can apply monthly investment plan online

“Message Centre” – You can view the latest information

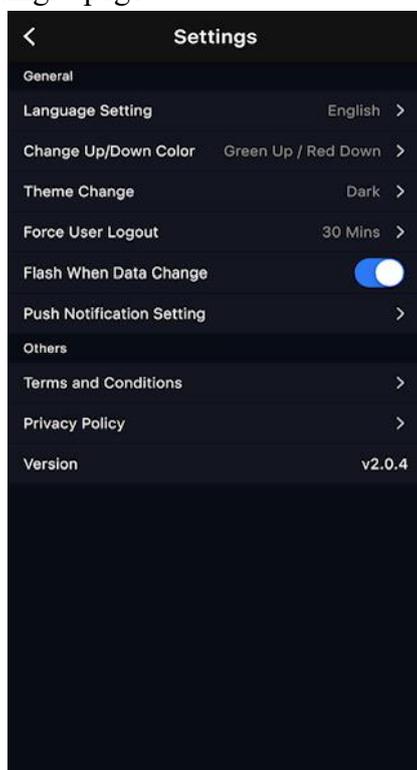
2.1 More

You can enter “More” page by clicking the Gear icon at the upper right corner of Home. You can view different information and set up your own preference on “More” page.



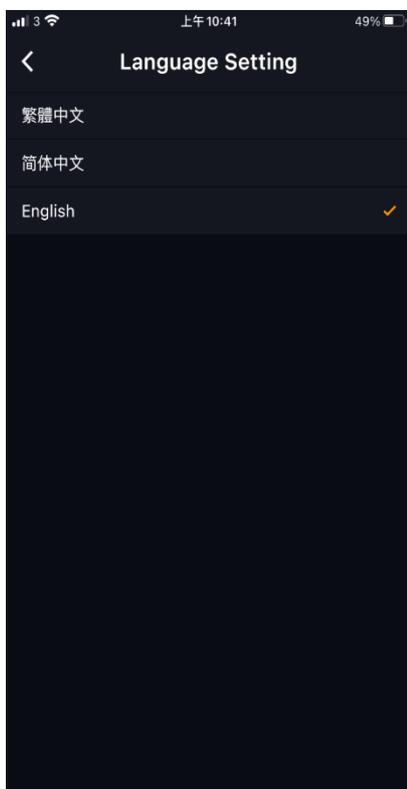
2.1.1 Settings

You can set your own preference, including “Language Setting”, “Theme change”, etc. under “Settings” page.



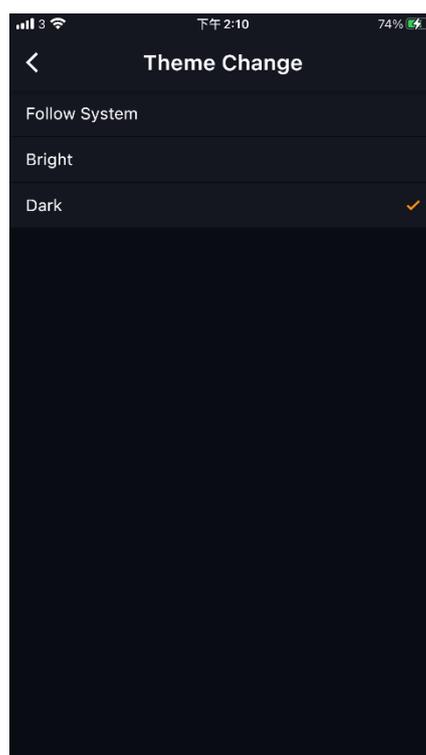
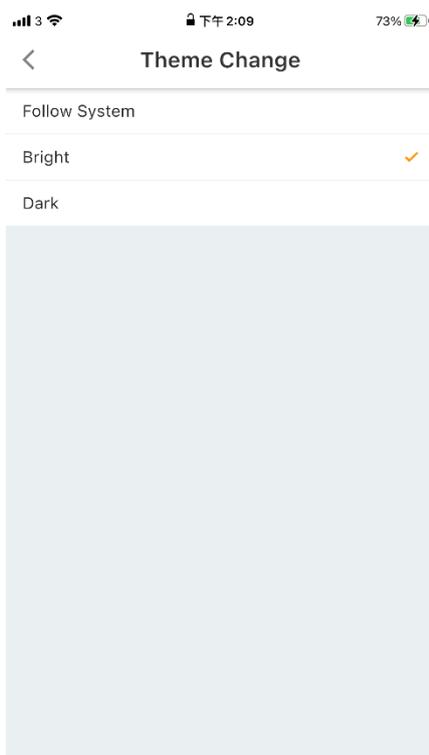
2.1.1.1 Language Setting

You can choose Traditional Chinese, Simplified Chinese or English to operate the app under “Language Setting” under “Settings” page.



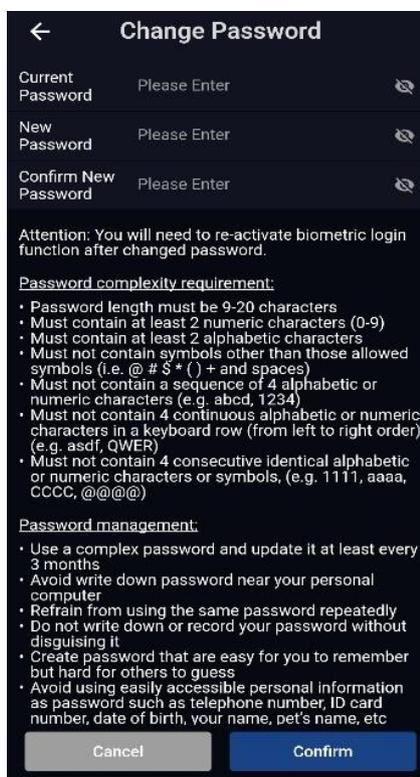
2.1.1.2 Theme Change

You can change the theme to Bright or Dark under “ Theme Change” under “Settings” page.



2.1.2 Change Password

“KGI Power Trader” has password change function. You can click “Change Password” under “Settings” page.



Change Password

Current Password Please Enter

New Password Please Enter

Confirm New Password Please Enter

Attention: You will need to re-activate biometric login function after changed password.

Password complexity requirement:

- Password length must be 9-20 characters
- Must contain at least 2 numeric characters (0-9)
- Must contain at least 2 alphabetic characters
- Must not contain symbols other than those allowed symbols (i.e. @ # \$ * () + and spaces)
- Must not contain a sequence of 4 alphabetic or numeric characters (e.g. abcd, 1234)
- Must not contain 4 continuous alphabetic or numeric characters in a keyboard row (from left to right order) (e.g. asdf, QWER)
- Must not contain 4 consecutive identical alphabetic or numeric characters or symbols. (e.g. 1111, aaaa, CCCC, @@@@)

Password management:

- Use a complex password and update it at least every 3 months
- Avoid write down password near your personal computer
- Refrain from using the same password repeatedly
- Do not write down or record your password without disguising it
- Create password that are easy for you to remember but hard for others to guess
- Avoid using easily accessible personal information as password such as telephone number, ID card number, date of birth, your name, pet's name, etc

Cancel Confirm

Note: As “KGI Power Trader”, “WebTrade” and “WebTrade – Professional Version” share the same password, changing password in any system will result in changing for other systems

simultaneously.

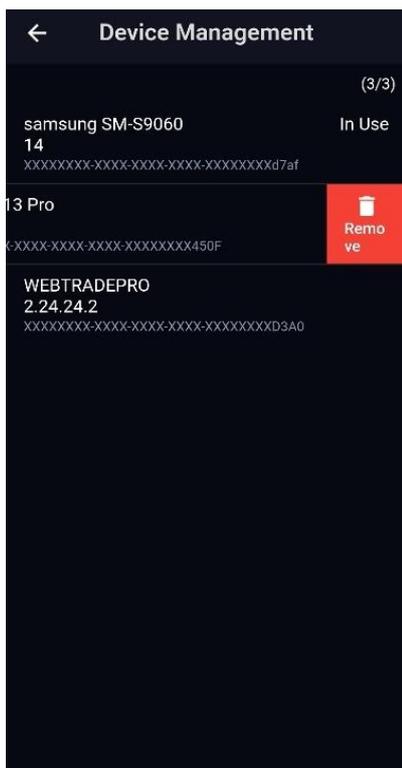
2.1.3 Device Management

“Device Management” page can let you view or delete any registered device.



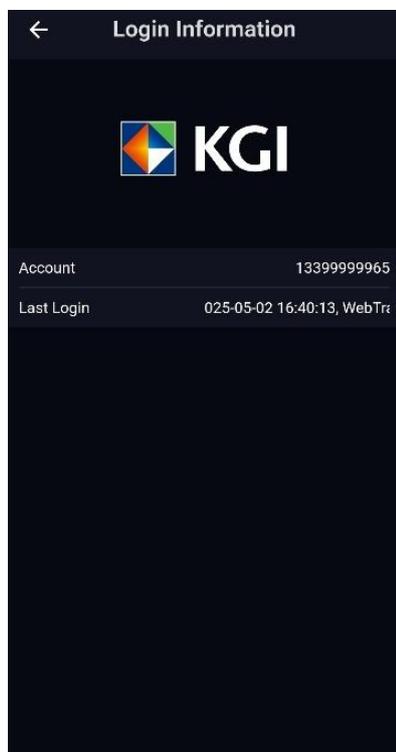
Note: After reaching the device registration limit, you are required to delete at least one device in order to add a new one.

If you want to delete a registered device, you just need to press the registered device that you would like to delete. Then slide to the left and press Remove.



2.1.4 Login Information

You can see the last login time on “Login Information” page.



3. Quote

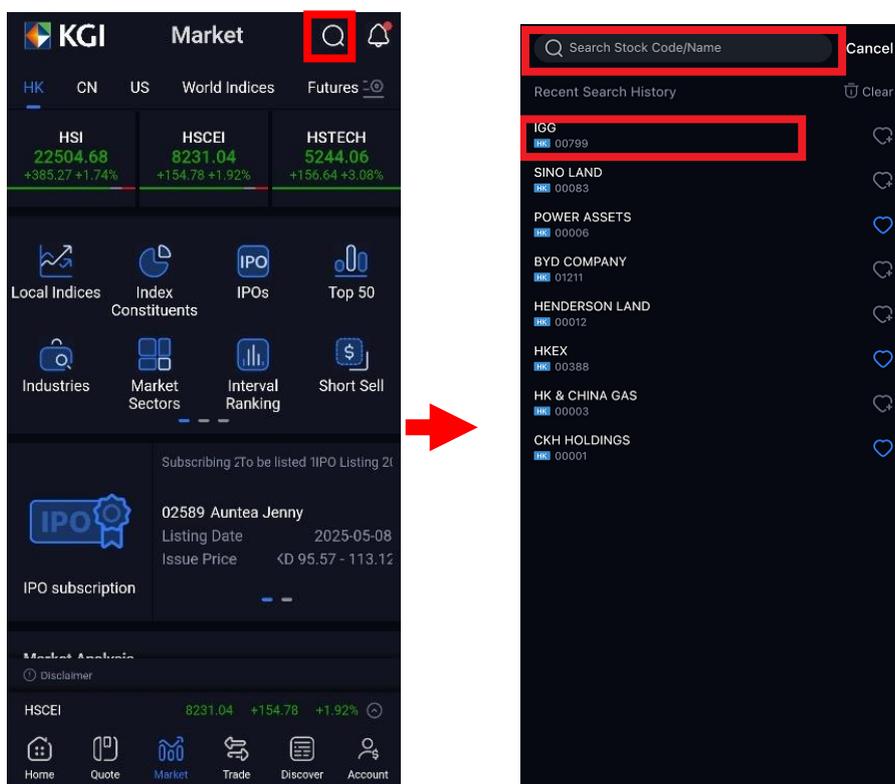
“KGI Power Trader” provides stock quotation of different markets, including Hong Kong Stock, US Stock, SH/SZ Connect.

Note: For US quote service, you’ll need to complete and submit an online subscription form.

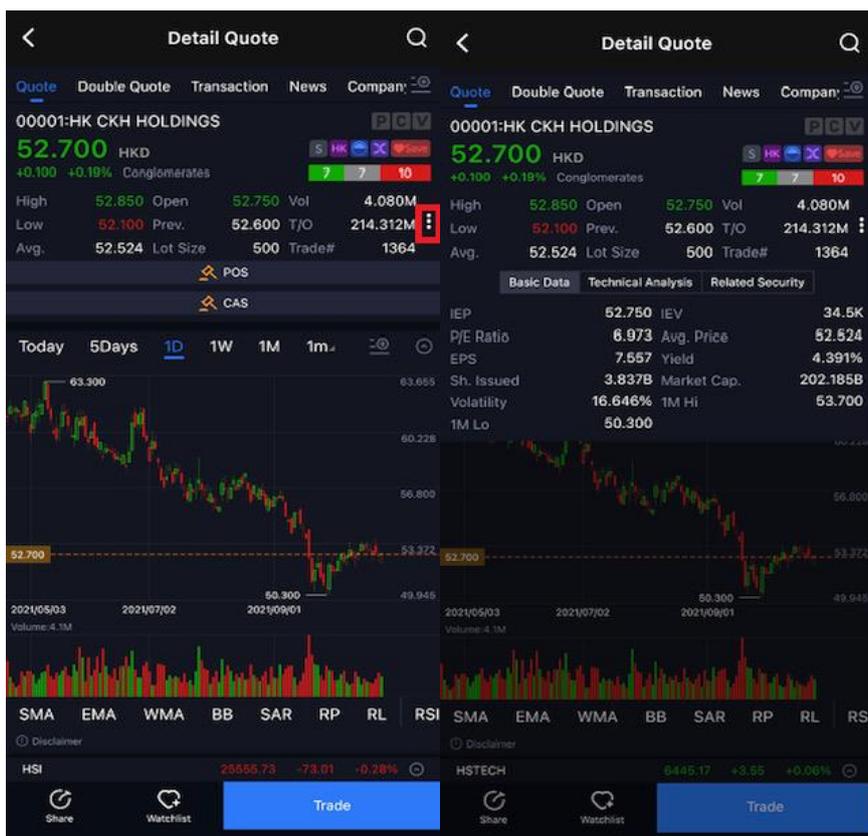
3.1 Detail Quote

To check the stock price on the “Quote HK Share” page, you can click the  icon:

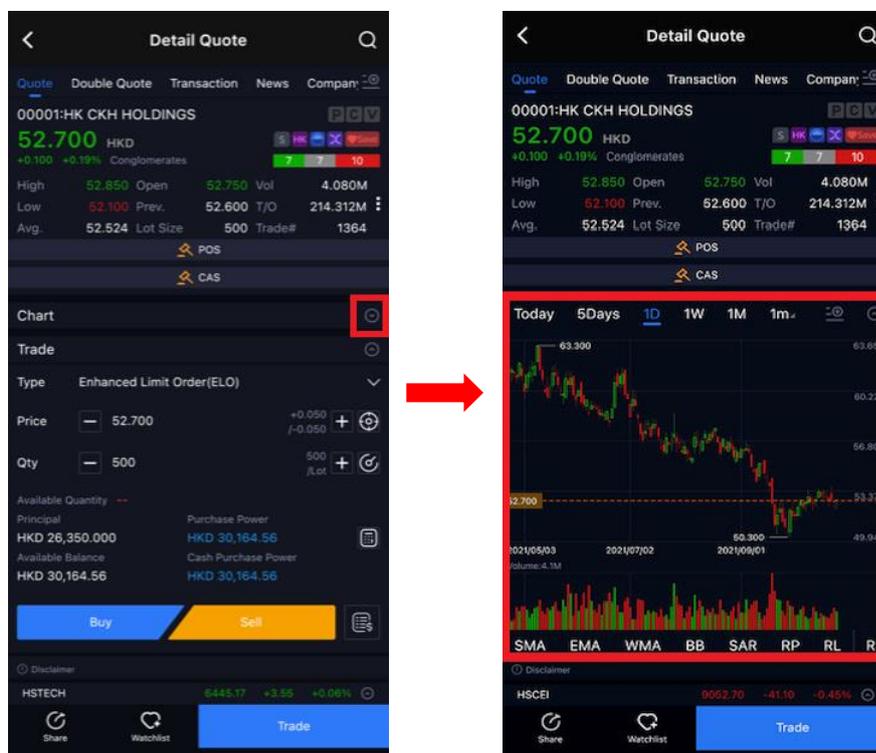
- Input the stock code/stock name, then click the stock or click the stock in Recent Search History.



You can click  to view Basic Data, Technical Analysis, Related Security



A larger chart with different time interval, chart comparison will be displayed once you click on the chart.



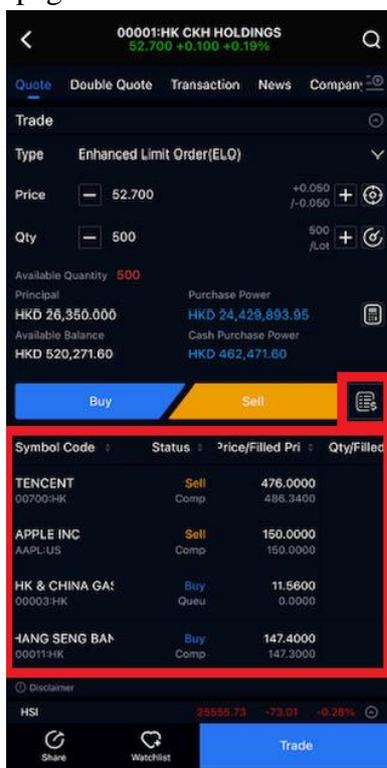


You can place order on the “Detail Quote” page, and input the following items:

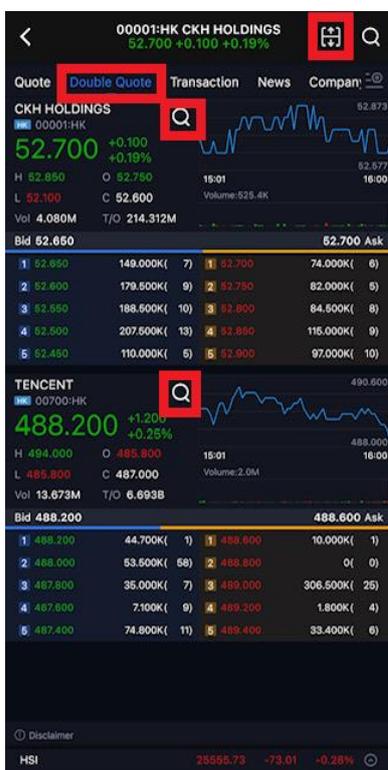
- I. Order Type
- II. Price
- III. Quantity (Qty)

Finally, select “BUY” or “SELL”.

You can click  icon to view the order book’s order status, executed price and etc within the same page.



You can watch two quotes simultaneously on the “Double Quote” page, and the display mode can be changed by clicking  icon at the top-right corner.



You can read relevant news about stock on the “Info” page.



You can view relevant stock information about that industry on the “Related Industry” page.



00001:HK CKH HOLDINGS
52.700 +0.100 +0.19%

History Transaction Company Info **Related Industry**

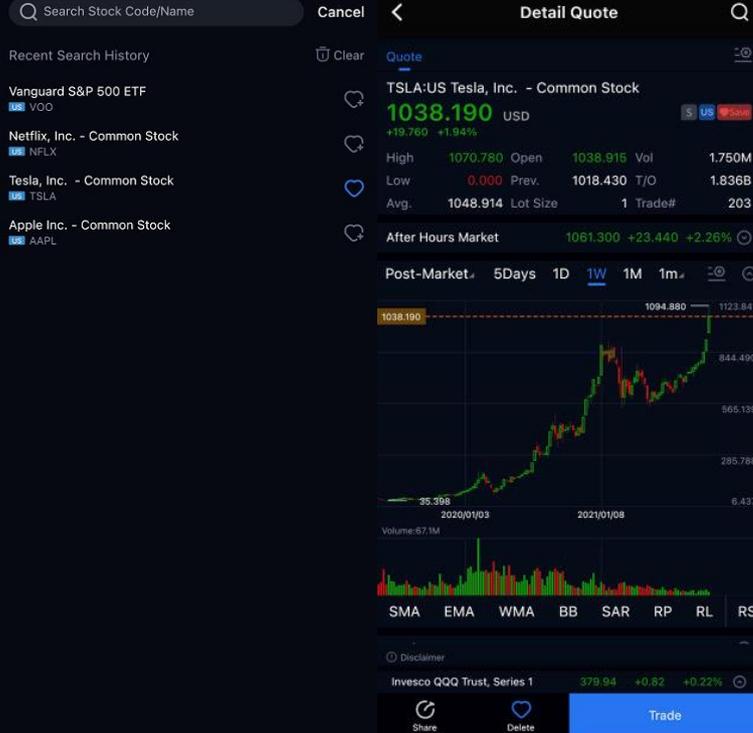
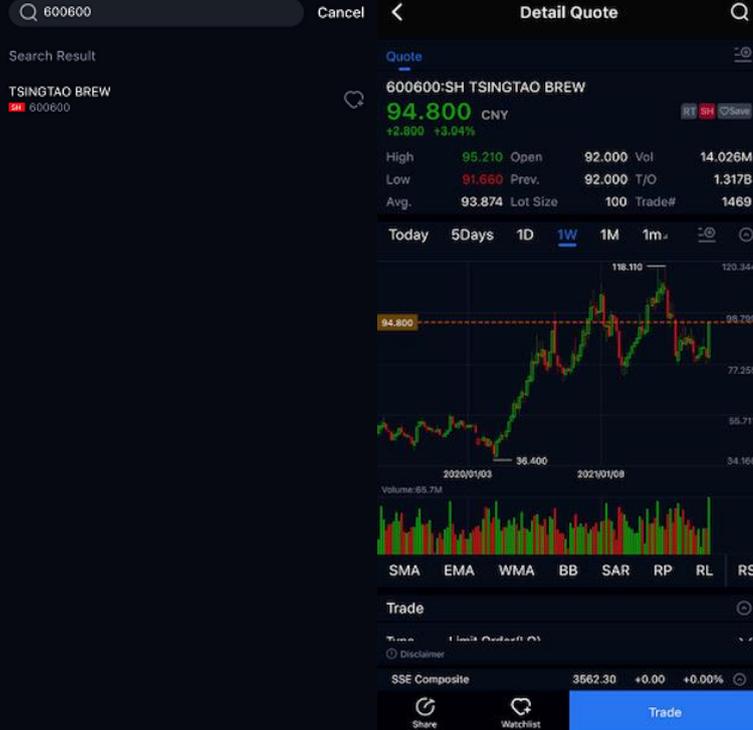
Conglomerates 7 8 9

	Nominal	Chg%	Chg
CHINA INV HOLD 00132	0.450	+13.92%	+0.055
VONGROUP 00318	0.445	+4.71%	+0.020
KING STONE ENGY 00663	0.046	+2.22%	+0.001
CHEVALIER INT'L 00025	9.730	+1.78%	+0.170
SWIRE PACIFIC A 00019	49.150	+0.51%	+0.250
CKH HOLDINGS 00001	52.700	+0.19%	+0.100
FOSUN INTL 00656	9.140	+0.11%	+0.010
GOLDIN FIN HOLD 00530	0.223	+0.00%	+0.000
TIANJIN DEV 00882	1.720	+0.00%	+0.000
GLORY SUN FIN 01282	0.275	+0.00%	+0.000
HK CHAOSHANG GP 02322	0.910	+0.00%	+0.000
MADISON HLDG 08057	0.127	+0.00%	+0.000
CHINESE STRAT	---	---	---

Disclaimer

3.1.1 US Share Quote and SH/SZ Connect Quote (Only for post-login)

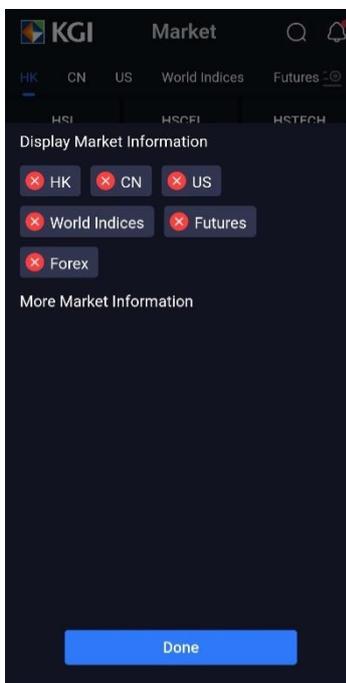
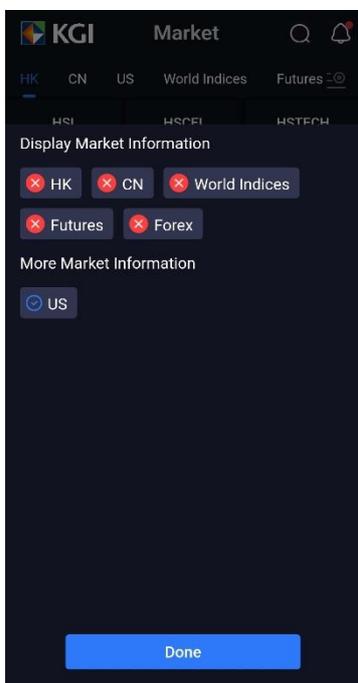
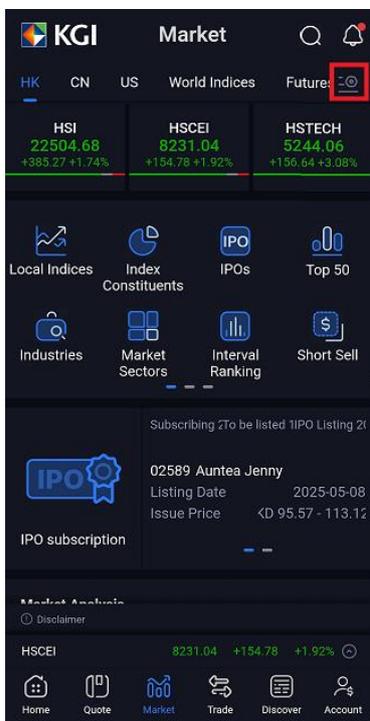
- Only applicable for users who have subscribed for US Share Quotes or SH/SZ Connect Quotes

<p>Quote US Share</p>		
<p>Quote SH/SZ Connect</p>		

*The Shanghai-Hong Kong Stock Connect/Shenzhen-Hong Kong Stock Connect quotation will take effect automatically two working days after successful opening of your account and no charge will be imposed.

3.2 Reorder

Click  button to edit your order preference on subpage of “Market” by moving the buttons.



3.3 Watchlist

You can create your personal watchlist.

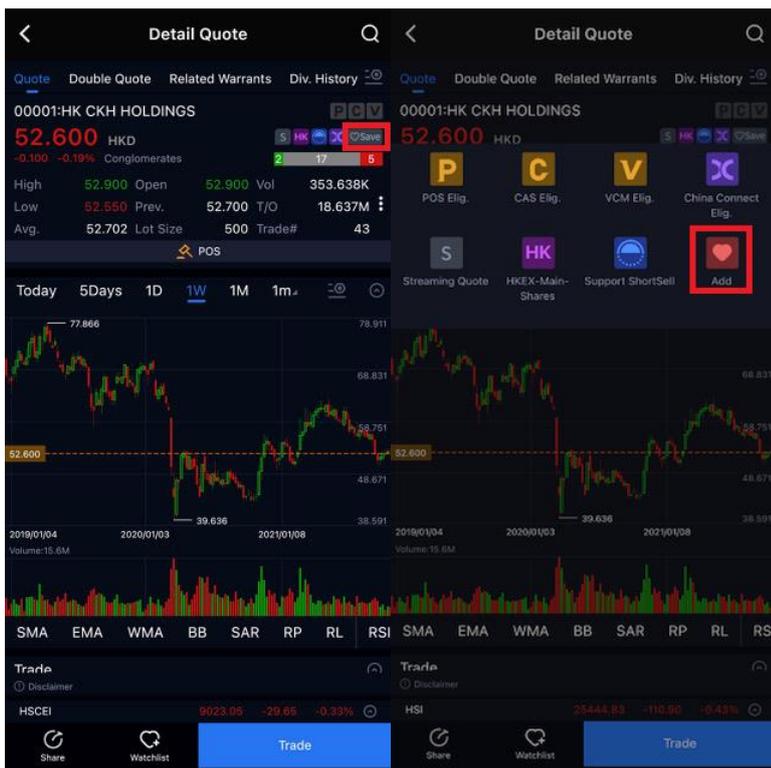
For pre-login status, you can only use default watchlist (Default-預設). You can create more watchlist after login.

Create watchlist

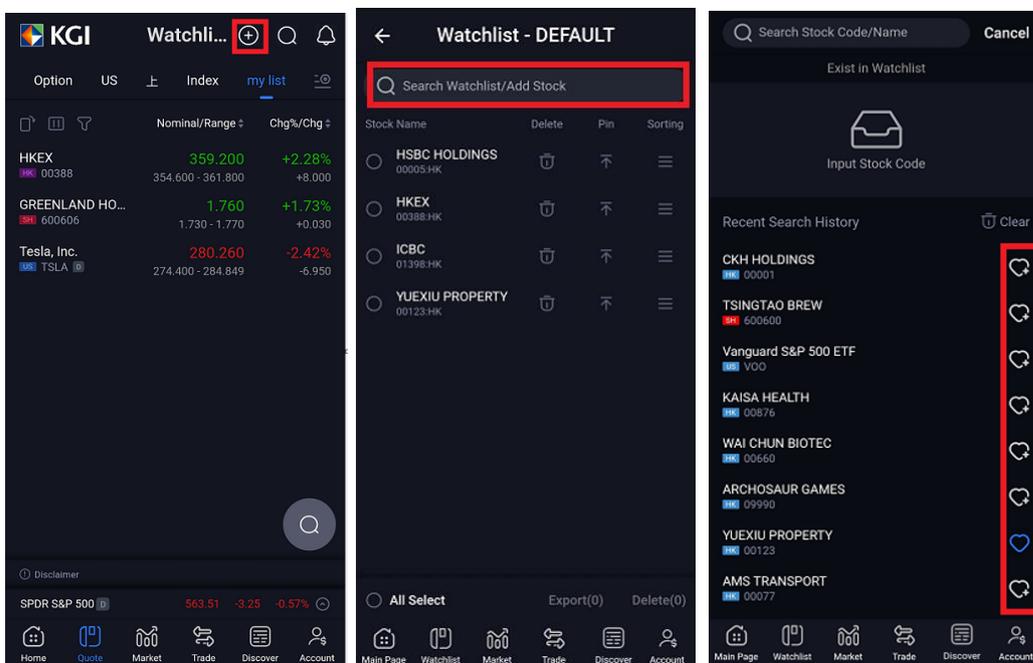


You can add stocks/indexes to the watchlist through any of following methods.

1. On the “Detail Quote” page, click  to add stock/index into watchlist.

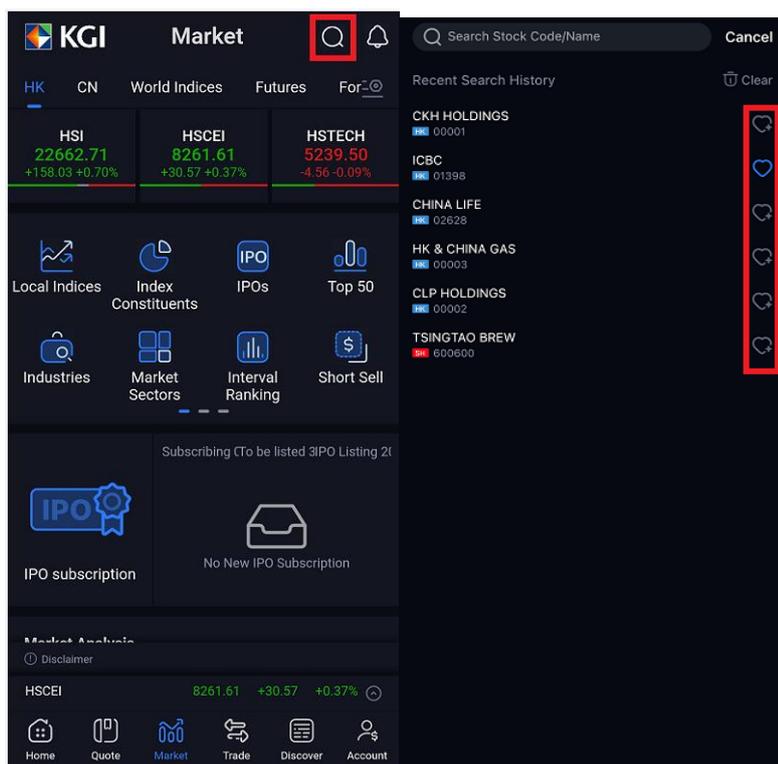


- On the “Watchlist” page, click  button at the top-right corner. Input the stock code/index, then click the heart icon .

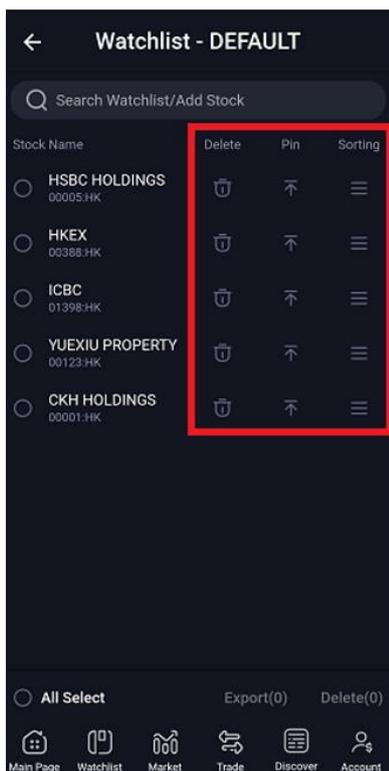




3. Input the stock code/index, then click the heart icon .

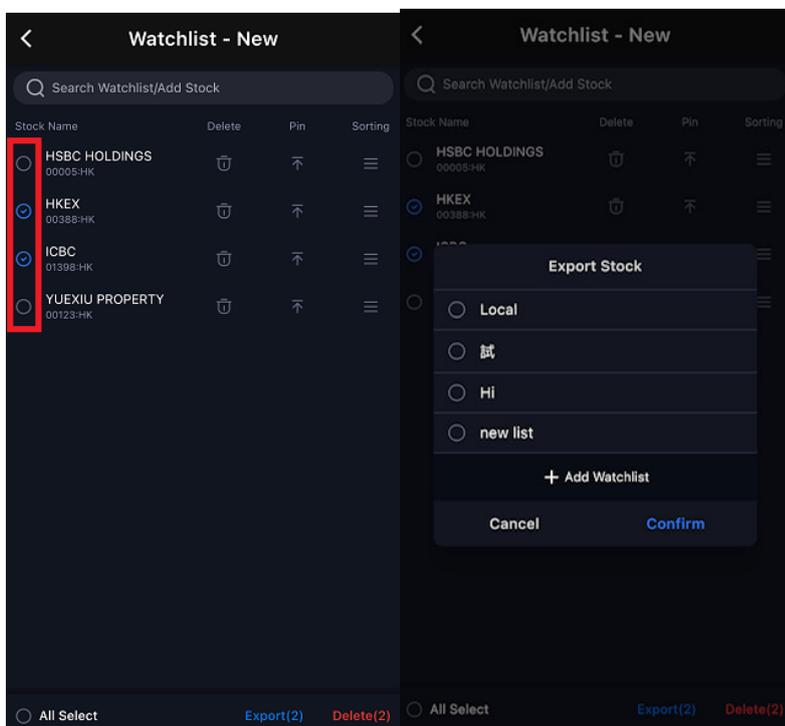


Edit the stock/index in a watchlist

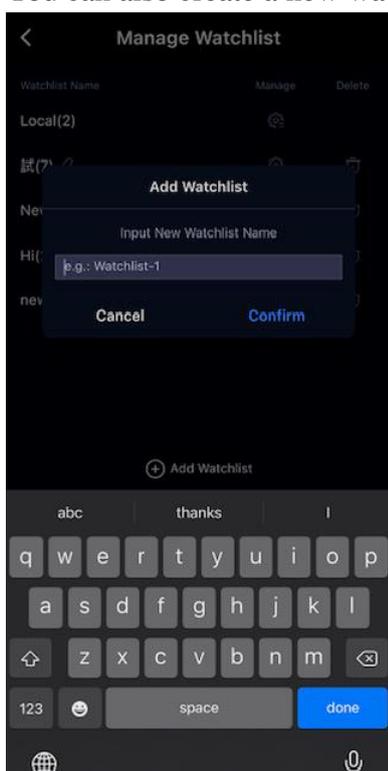


On the “Watchlist Management” page, you can choose multiple stocks, export to another watchlist or delete them.

Choose stock(s) and click [Export], then choose the watchlist to export.



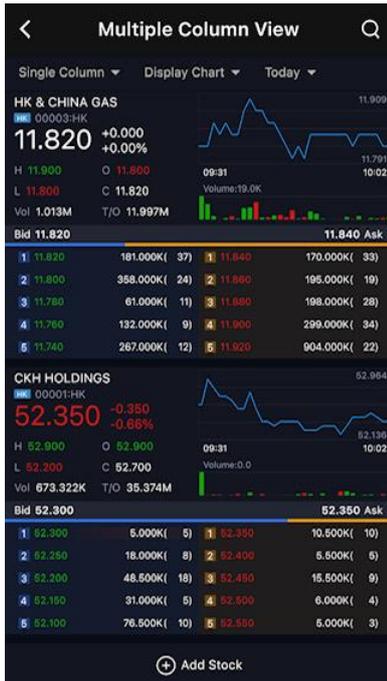
You can also create a new watchlist by clicking [Add Watchlist].



Click  icon to change to another watchlist display mode.

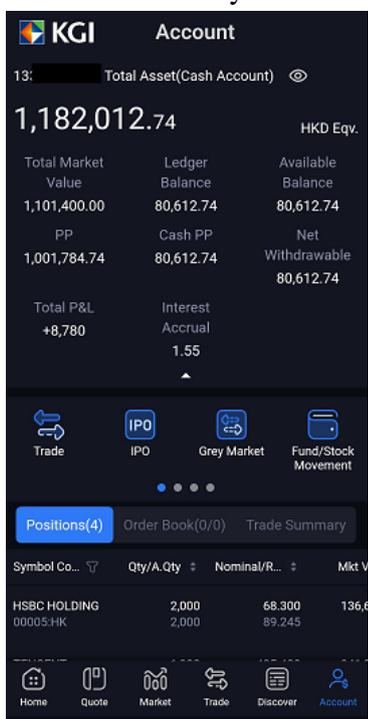


Click the  icon to view watchlist stock quotes in Multiple Column View mode.



4. Account

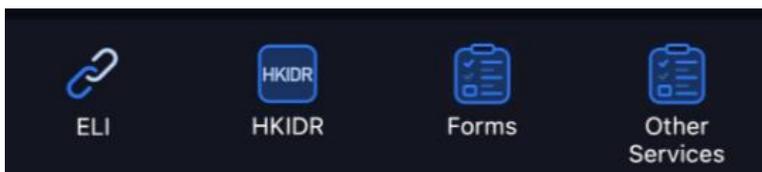
You can check the latest account balance on the “Account” page. Balance will update automatically.



4.1 Menu Bar

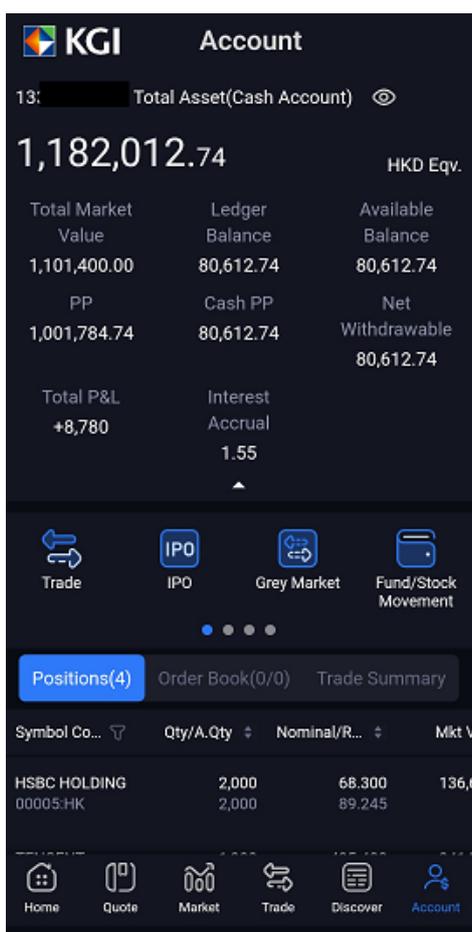
You can access different functions with the “Menu Bar”.





- I. Click “Trade” to go to the “Buy/Sell” page.
- II. Click “IPO” to access IPO “Subscription” page, check “Allotment Status” and “IPO Calendar”.
- III. Click “Grey Market” to go to “Grey Market” page.
- IV. Click “Fund/ Stock Movement” for “Fund Movement” and “Stock Movement”.
- V. Click “eDDA” to “Register” eDDA or check previous “Records”.
- VI. Click “e-Statement” to view “Daily” and “Monthly” statement.
- VII. Click “Order History” to view previous trading records, up to 21 days, including Done, Cancelled and Rejected orders. Clicking the “Symbol Code” header to select the sorting order, filter markets, trade date, direction and order status. You can also sort the list by clicking each header.
- VIII. Click “Monthly Invest. Plan” to subscription “Monthly Investment Plan” or check “Effective Plans”.
- IX. Click “Wealth Portfolio” to check account wealth portfolio.
- X. Click “Multi-Currency” to view the account HKD equivalent balance. This page also displays the balances of foreign currencies.
- XI. Click “Other Accounts” to go to other accounts login page.
- XII. Click “Margin” to view the “Margin Table” of Hong Kong, Shanghai A, Shenzhen A and US stocks. You can also view eligible securities of China Connect.
- XIII. Click “ELI” to subscribe service for Equity-linked Investment (ELI)
- XIV. Click “HKIDR” to submit a consent form for the HKIDR.
- XV. Click “Forms” to submit different forms, e.g. Risk Preference Questionnaire, W-8 Form etc.
- XVI. Click “Other Services” to apply Global Market Trading or check application record

4.2 Position



1. Check Position

You can check your portfolio on the “Positions” page. Position will update automatically.

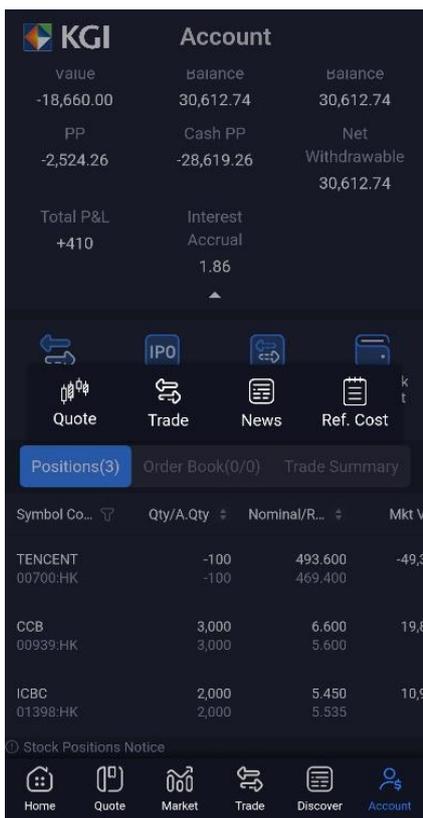
Clicking the “Symbol Code” header allows you to select the sorting order and filter markets. You can also sort the list by clicking other header.



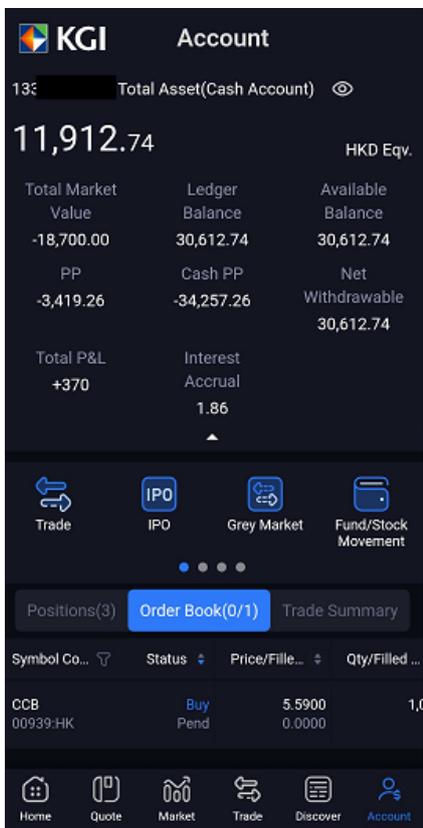
2. Further Action

You can click on the position and choose:

- I. Click "Quote" to go to the "Detail Quote" page
- II. Click "Trade" to go to the "Trade" page
- III. Click "Info" to go to the "Stock News" page
- IV. Click "Ref. Cost" to manually set reference cost

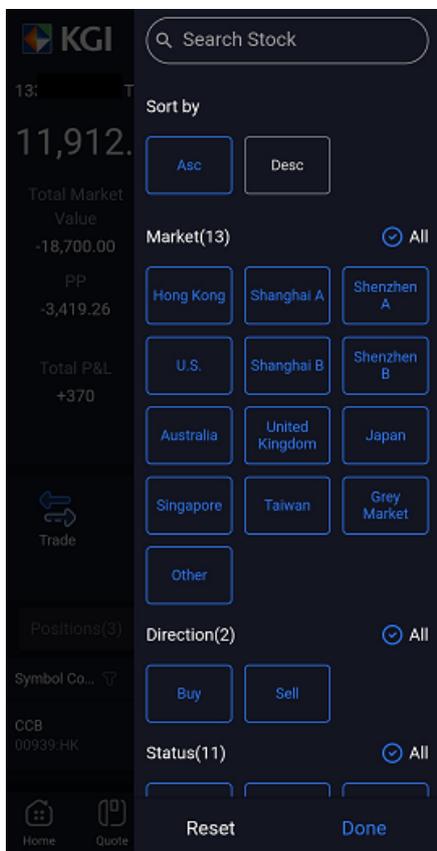


4.3 Order Book



1. Check order book

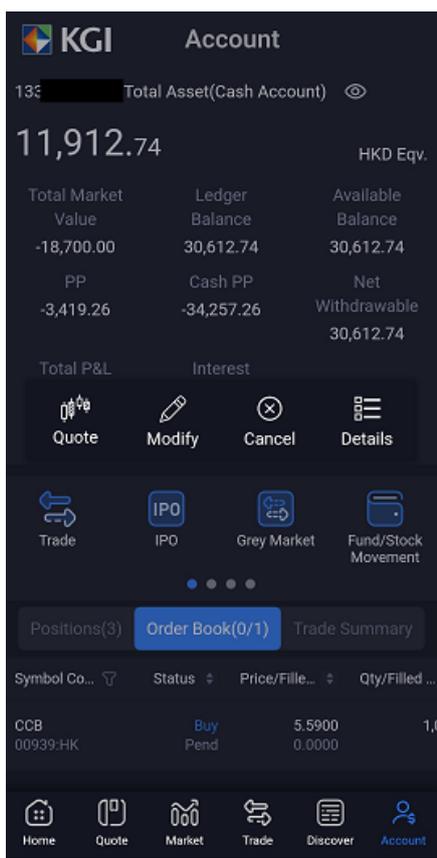
You can find today's transaction records on the "Order Book" page. You can slide the page downward to update the order details, click the "Symbol Code" header to select the sorting order, filter markets, direction and order status. You can also sort the list by clicking each header.



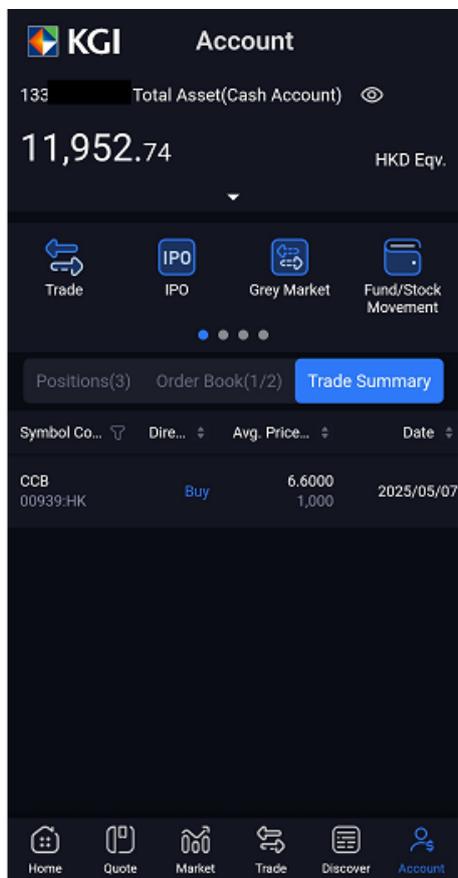
2. More Function

You can click on the order and choose:

- I. Click "Quote" to go to the "Detail Quote" page.
- II. Click "Modify" to modify order.
- III. Click "Cancel" to access a pop-up confirmation window for order cancelling
- IV. Click "Details" to go to the "Order Details" page.



4.4 Trade Summary

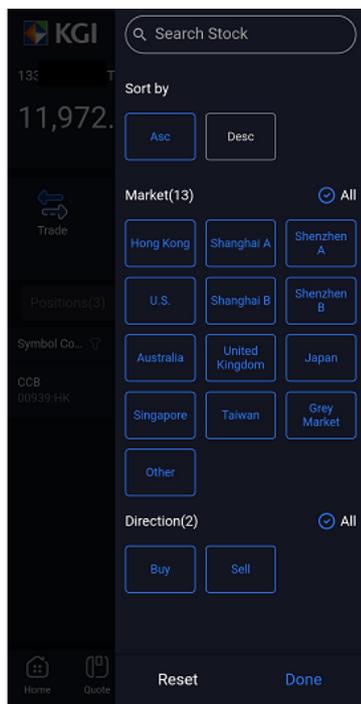


1. Check trade summary

You can find today's done trade summary on the "Trade Summary" page. The summary will be sorted by symbol code and direction. You can slide the page downward to update the order details.

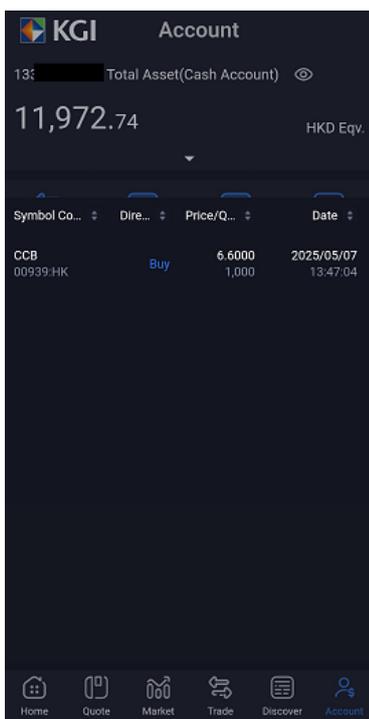
Click the "Symbol Code" header to select the sorting order, filter markets and direction.

You can also sort the list by clicking each header.



2. More Function

You can click on the trade record and view all transaction details on the stock.



5. Trade

“KGI Power Trader” provides trade services for different markets, including Hong Kong Stock, US Stock and SH/SZ Connect.

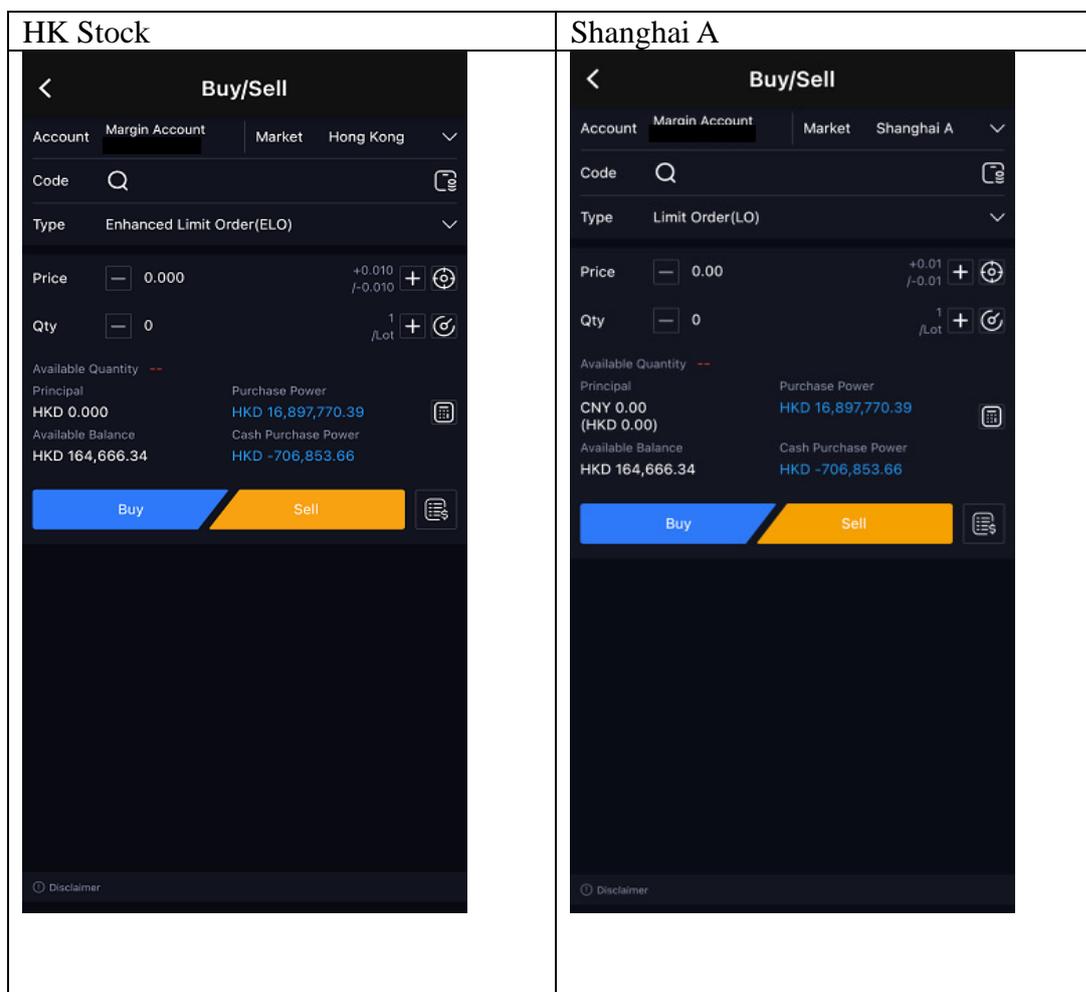
Note: If you want to trade SH/SZ Connect, you need to apply for the trading authority.

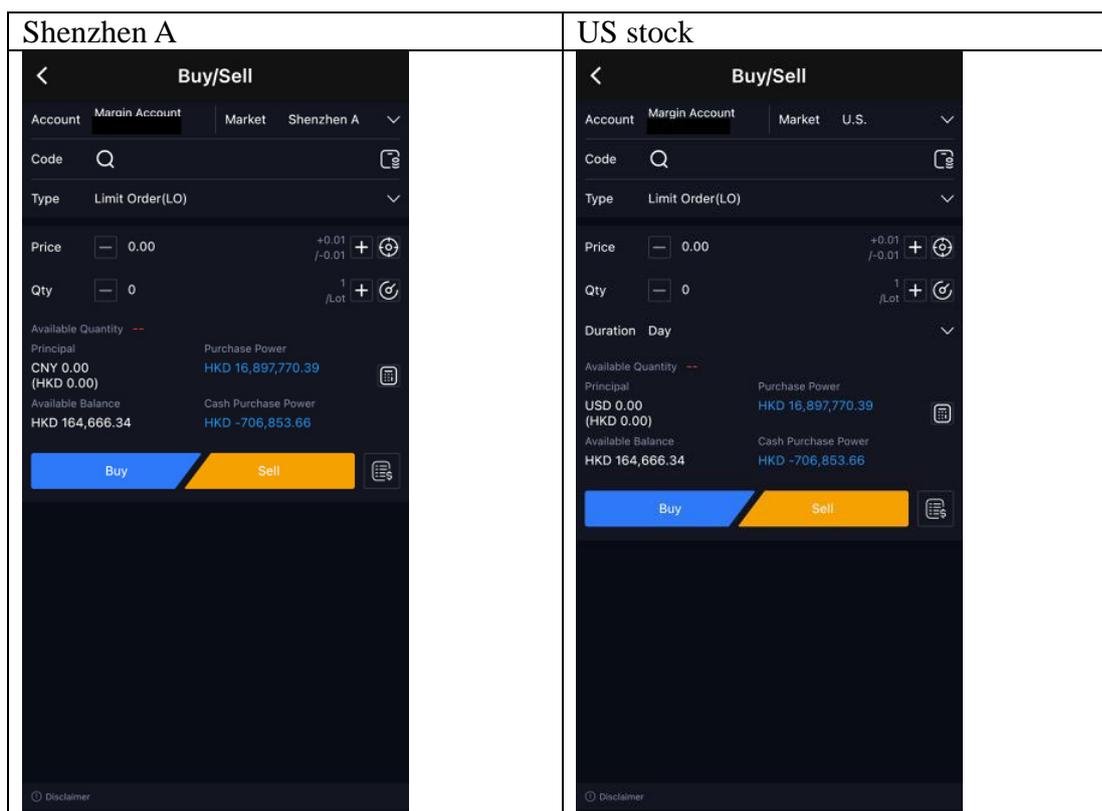
5.1 Stock Trade

1. Select the Market once you enter the “Trade” page, and input the following items:

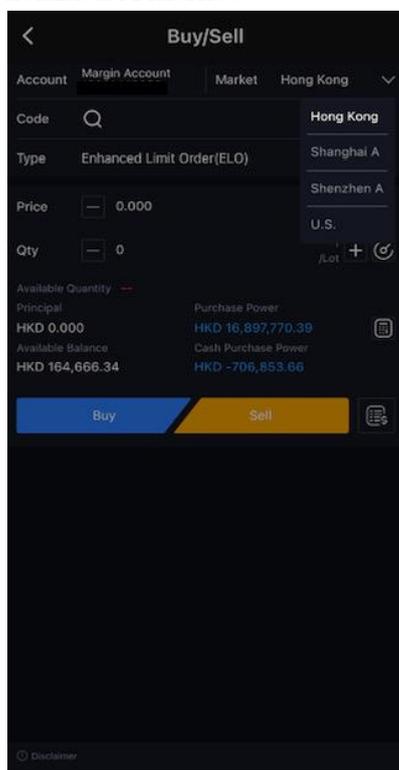
- I. Stock Code
- II. Order Type
- III. Price
- IV. Quantity (Qty)

Finally, select “BUY” or “SELL”.

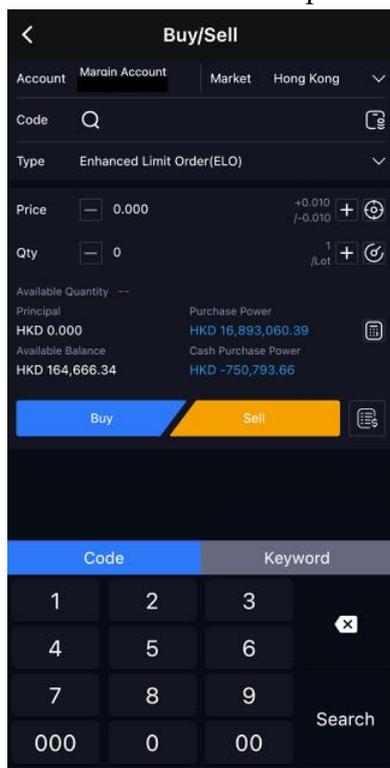




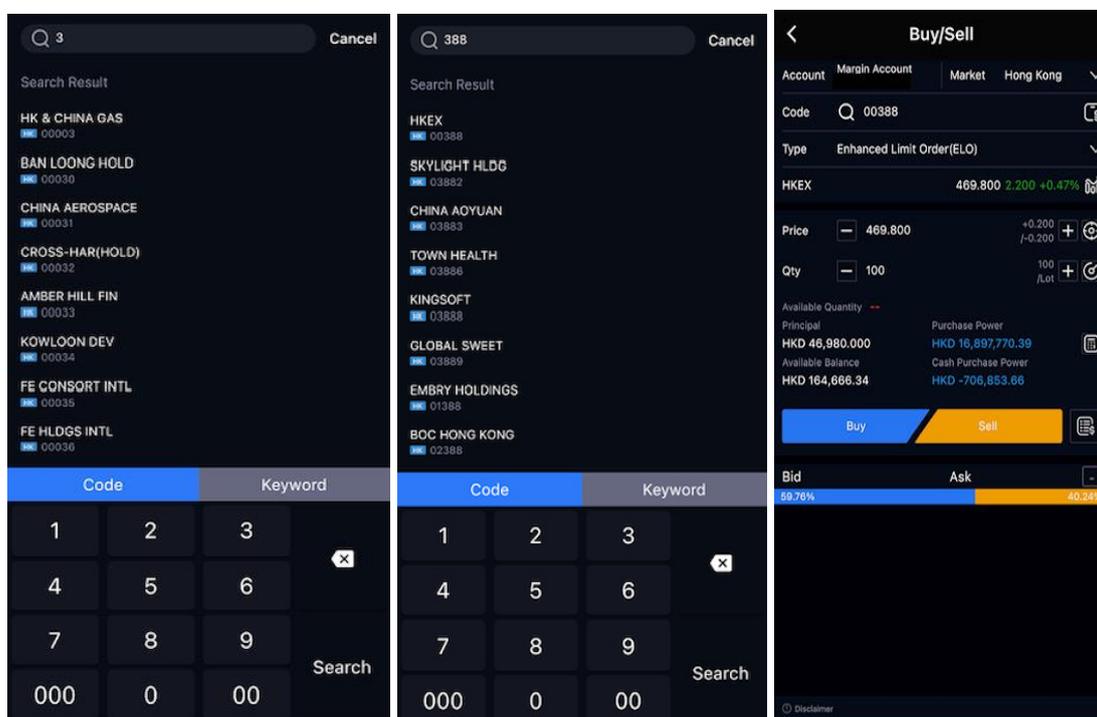
2. Click “Market” field to choose the trading market, including HK market, US market, Shanghai A and Shenzhen A market.



3. Click “Code” field to open the stock code input pad.



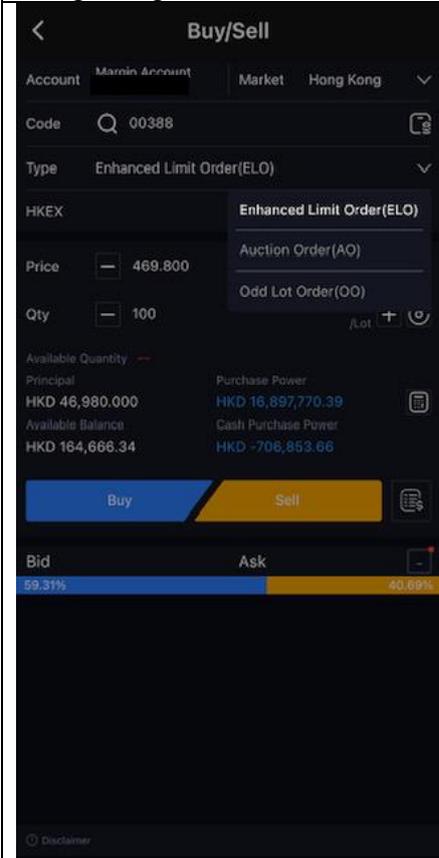
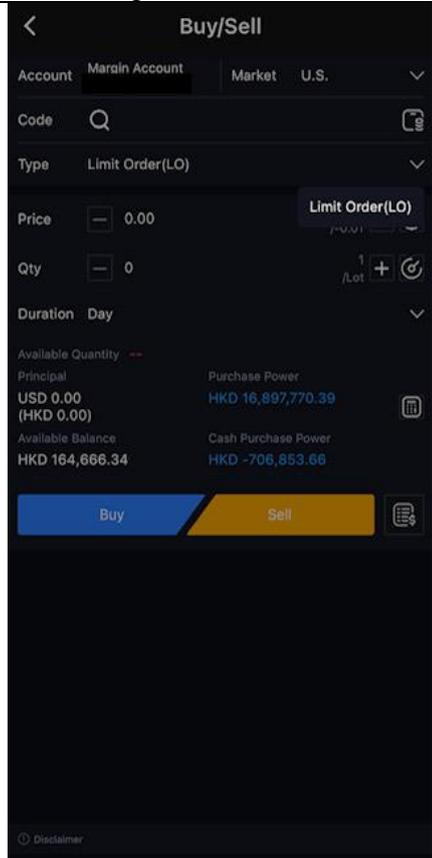
Also, click  to input stock code or stock name to search



To get latest position, you can press , which is next to “Code” right side

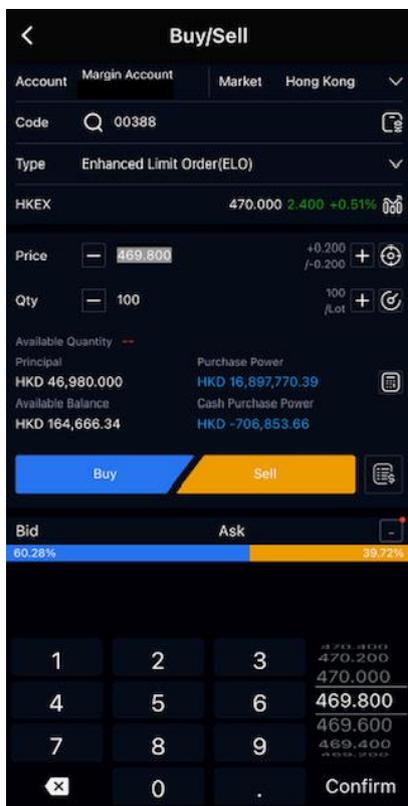
Code	Qty/A	Qty	Nominal/Ref. C
Price: 469.800 (+0.200)			
CKH HOLDINGS	500		52,500
00001:HK	500		57,900
HSBC HOLDING	7,200		46,850
00005:HK	7,200		43,500
POWER ASSETS	500		47,300
00006:HK	500		49,650
PCCW	14,000		4,010
00008:HK	14,000		4,130
ING SENG BANK	100		146,500

4. Click “Type” field to choose order type for the market

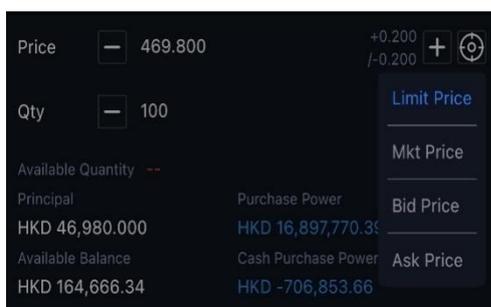
Hong Kong	US, Shanghai A and Shenzhen A*
	

*Stock Connect

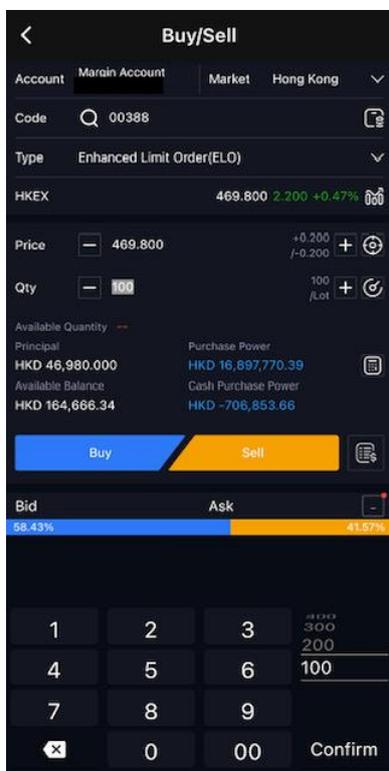
- Click [+] or [-] shown in the “Price” field to adjust the price based on market price.
Click the blank “Price” field, to input the price directly by using the number pad or scrollbar.



Moreover, you can choose the price order type by pressing 

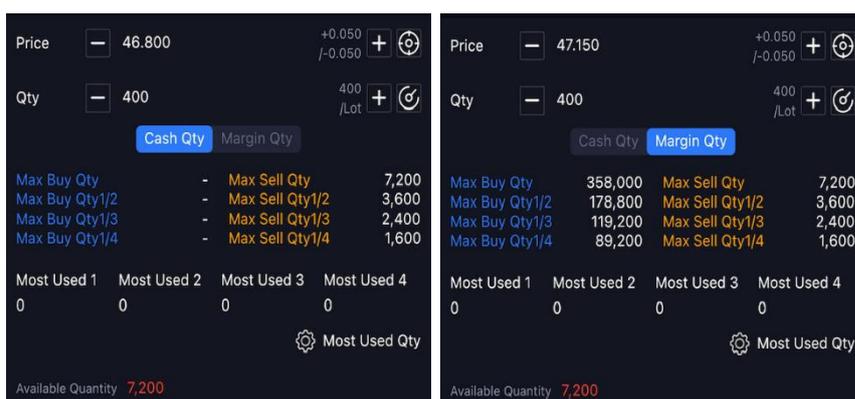


- Click [+] or [-] shown in the “Qty” field to adjust the lot size based on stock trading lot. Click the blank “Qty” field, to input the lot size directly by using the number pad or scrollbar.

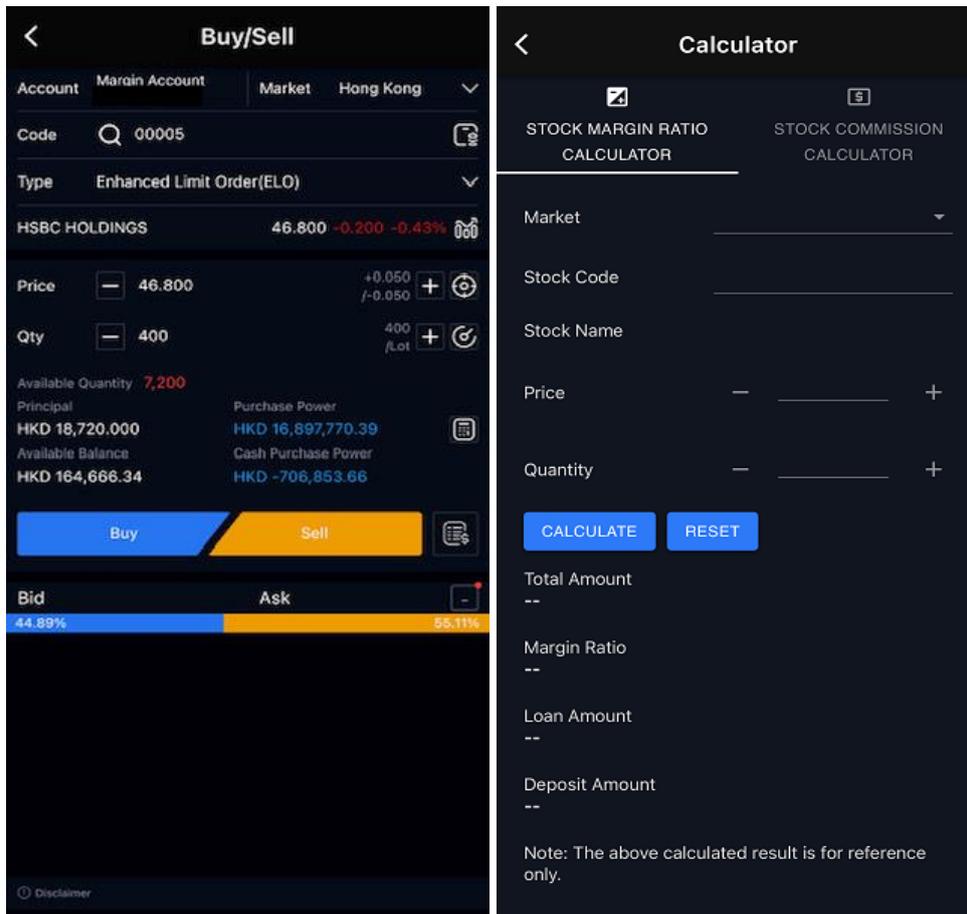


If you want to calculate the maximum buy/sell qty based on your cash or margin portfolio, you

can press 



To calculate the margin or commission, press

Buy/Sell

Account Margin Account Market Hong Kong

Code 00005

Type Enhanced Limit Order(ELO)

HSBC HOLDINGS 46.800 -0.200 -0.43%

Price 46.800 +0.050 / -0.050

Qty 400 400 / Lot

Available Quantity 7,200

Principal HKD 18,720,000 Purchase Power HKD 16,897,770.39

Available Balance HKD 164,666.34 Cash Purchase Power HKD -706,853.66

Buy Sell

Bid 44.89% Ask 55.11%

Disclaimer

Calculator

STOCK MARGIN RATIO CALCULATOR STOCK COMMISSION CALCULATOR

Market

Stock Code

Stock Name

Price - +

Quantity - +

CALCULATE RESET

Total Amount --

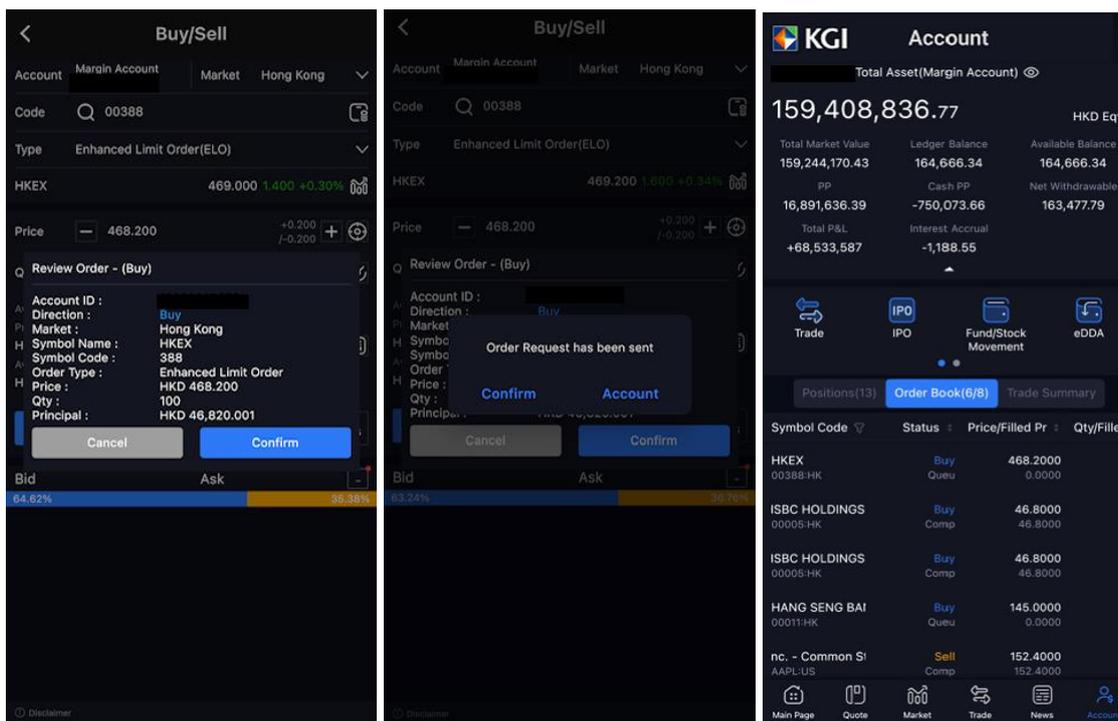
Margin Ratio --

Loan Amount --

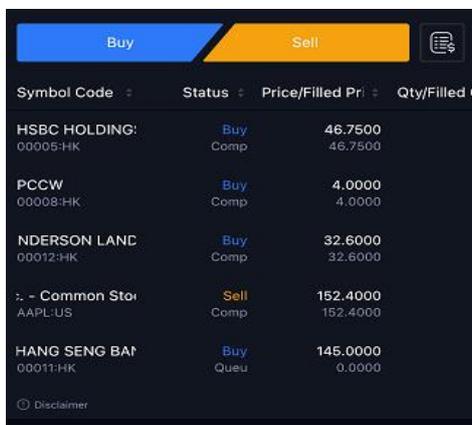
Deposit Amount --

Note: The above calculated result is for reference only.

- Upon completing all order fields, click the corresponding order button (i.e. Buy or Sell button), the page will go to the new order confirmation page so you can check the order details. If you want to make amendment or cancel the order, click [Cancel]. If you would like to confirm the order, click [Confirm]. After the order is submitted, a message “Order Request has been sent” will be displayed. Click [Confirm] to stay on the order ticket page, click [Account] to go to the “Account” page, you can find the order status at the “Order Book” page.

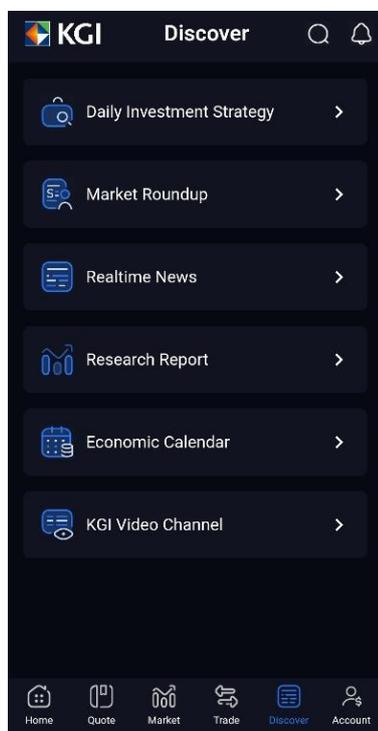


Press  next to “BUY” or “SELL” button, you can check the latest order book.



6. Discover

You can click the “Discover” button at the bottom right corner to view market news, information and video.



7. Logout Procedure

Click “Logout” button at the bottom of “More” page, then click confirm. Your account will be logged out and you’ll be redirected to the “Login” page again.

