

# BEA SmarTrade User Manual

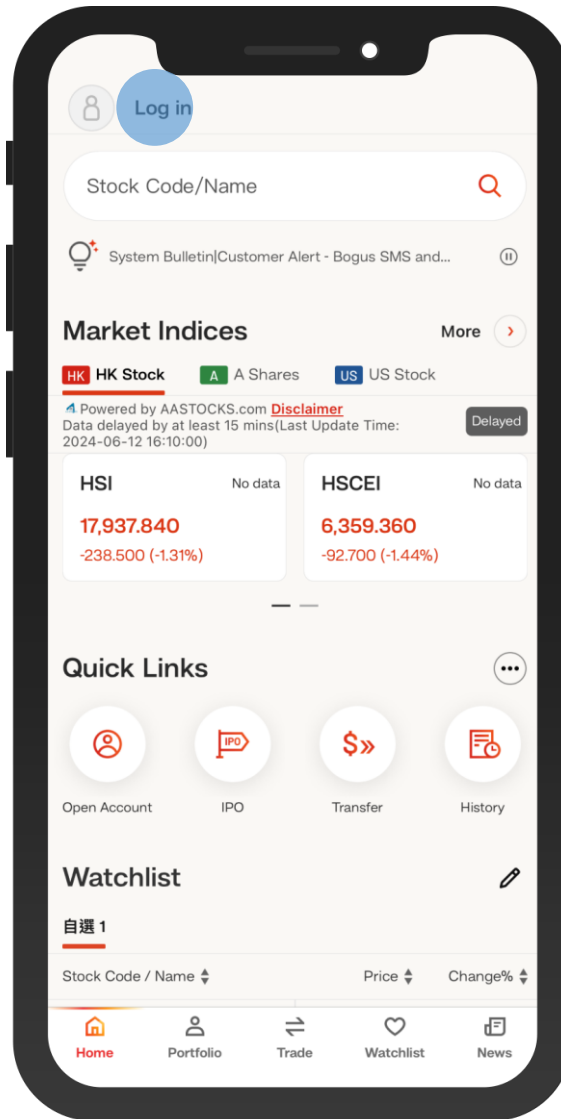
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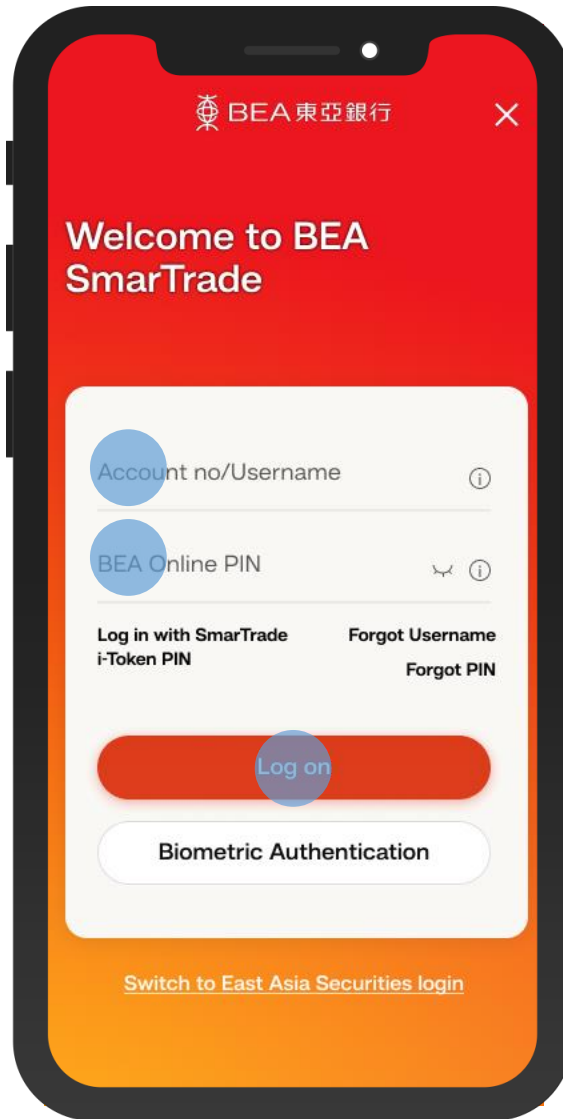
# BEA SmarTrade

## (1.Log in)



- 1 • Open “BEA SmarTrade” app  
• Select “Log in”

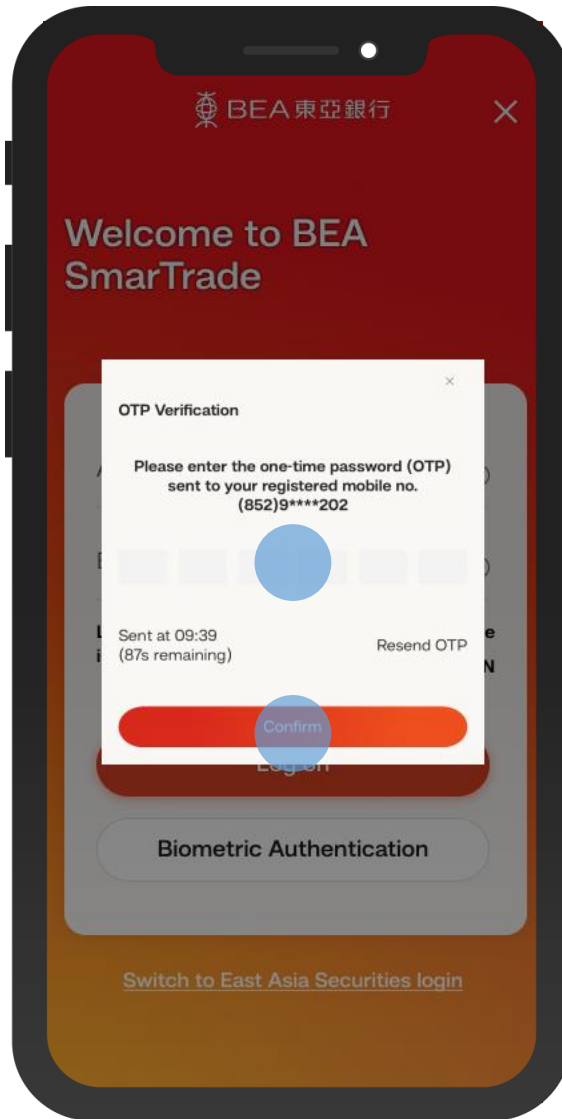
# BEA SmarTrade (1.Log in)



- 2 • Enter “Username/ Login No.” and “BEA Online PIN”
- Select “Log in”

# BEA SmarTrade

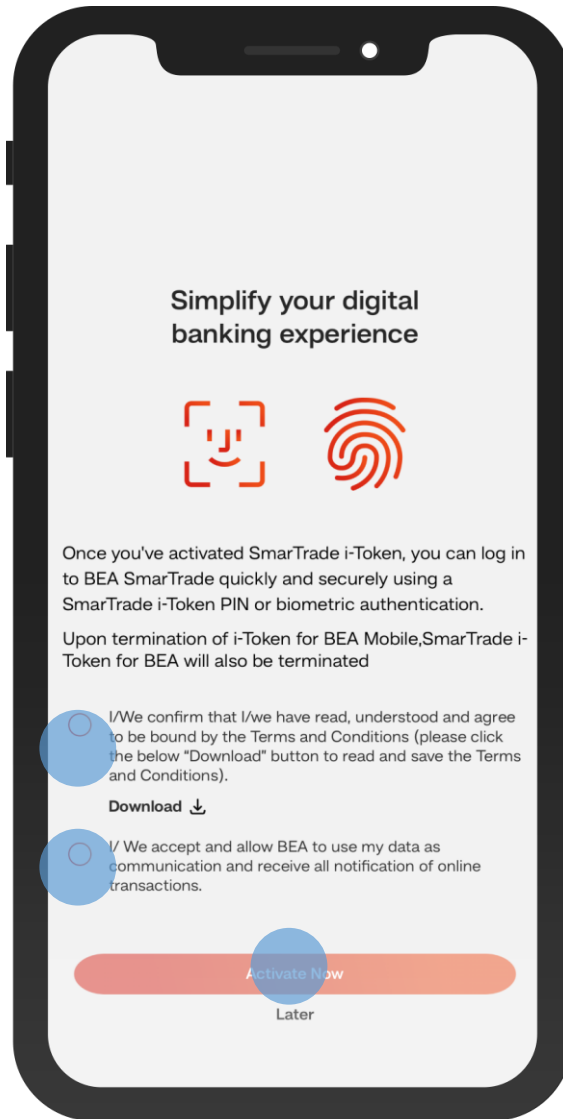
## (1.Log in)



- 3 • Enter the one-time password ("OTP") sent to you
- Select "Confirm"

# BEA SmarTrade

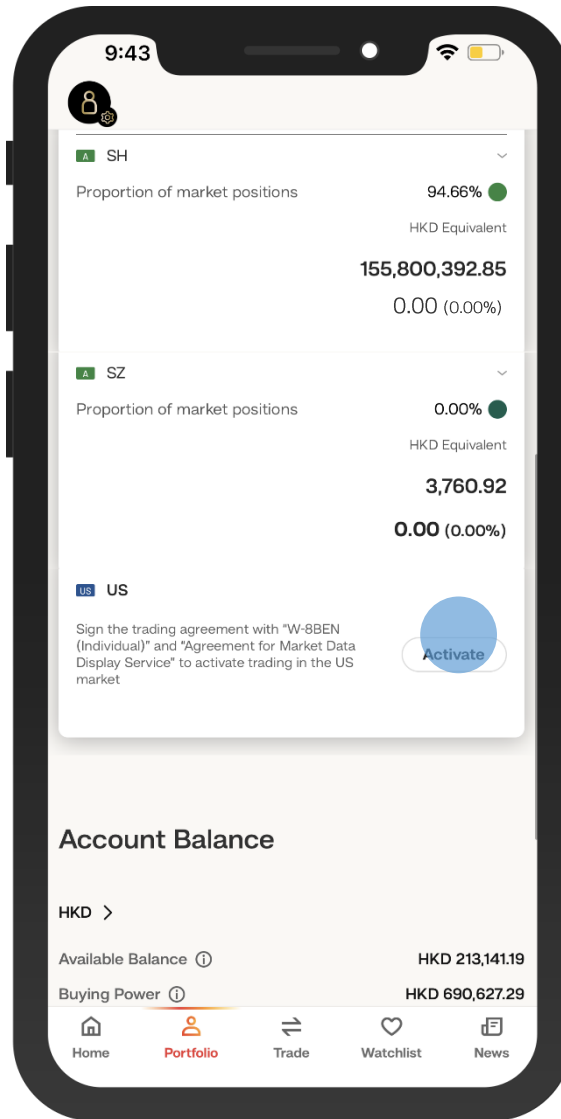
## (2.Activate SmarTrade i-Token)



- 1 • If you have activated “i-Token” in “BEA Mobile”, you may activate SmarTrade i-Token and biometric authentication after logged in “BEA SmarTrade”
- Read and agree to the relevant Terms and Conditions, then select “Activate Now”

# BEA SmarTrade

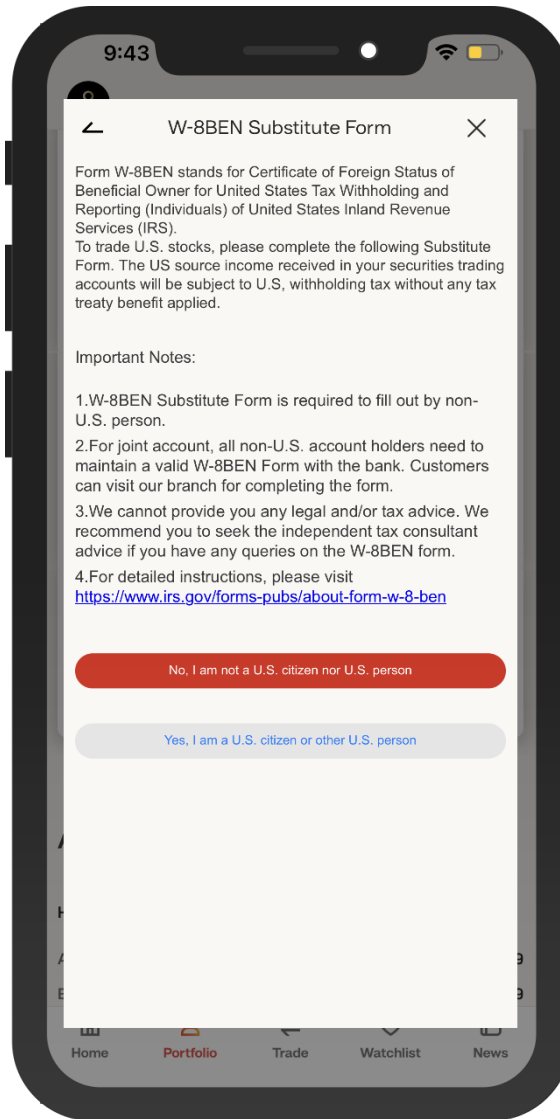
## (3. Activate US market trading)



- 1 • Select "Portfolio"
- Select "Activate" for US market trading

# BEA SmarTrade

## (3.Activate US market trading)



The image shows a smartphone screen displaying the 'W-8BEN Substitute Form' interface. At the top, the status bar shows the time 9:43 and battery level. The app header includes a back arrow, the title 'W-8BEN Substitute Form', and a close 'X' button. The main text explains that Form W-8BEN is for non-U.S. persons and provides instructions for completing it. Below this, 'Important Notes' are listed. At the bottom, there are two buttons: a red one for non-U.S. citizens and a grey one for U.S. citizens. The bottom navigation bar of the app is visible with icons for Home, Portfolio, Trade, Watchlist, and News.

9:43

W-8BEN Substitute Form

Form W-8BEN stands for Certificate of Foreign Status of Beneficial Owner for United States Tax Withholding and Reporting (Individuals) of United States Inland Revenue Services (IRS).

To trade U.S. stocks, please complete the following Substitute Form. The US source income received in your securities trading accounts will be subject to U.S. withholding tax without any tax treaty benefit applied.

Important Notes:

- 1.W-8BEN Substitute Form is required to fill out by non-U.S. person.
- 2.For joint account, all non-U.S. account holders need to maintain a valid W-8BEN Form with the bank. Customers can visit our branch for completing the form.
- 3.We cannot provide you any legal and/or tax advice. We recommend you to seek the independent tax consultant advice if you have any queries on the W-8BEN form.
- 4.For detailed instructions, please visit <https://www.irs.gov/forms-pubs/about-form-w-8-ben>

No, I am not a U.S. citizen nor U.S. person

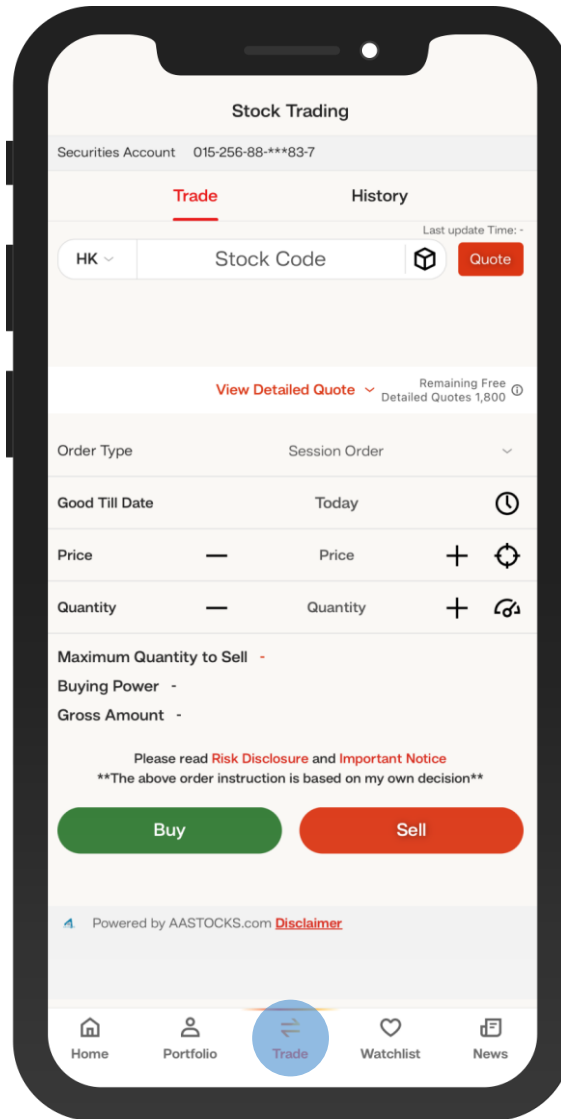
Yes, I am a U.S. citizen or other U.S. person

Home Portfolio Trade Watchlist News

- 2 • Follow instructions to complete W-8BEN Substitute Form

# BEA SmarTrade

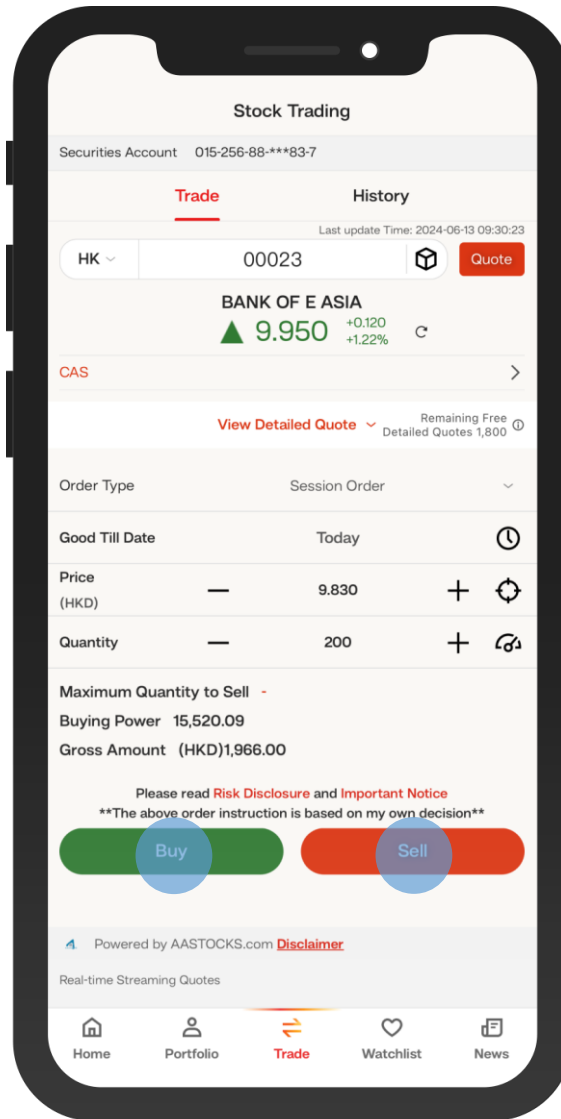
## (4.Trade)



- 1 • Log in “BEA SmarTrade”
  - Select “Trade”

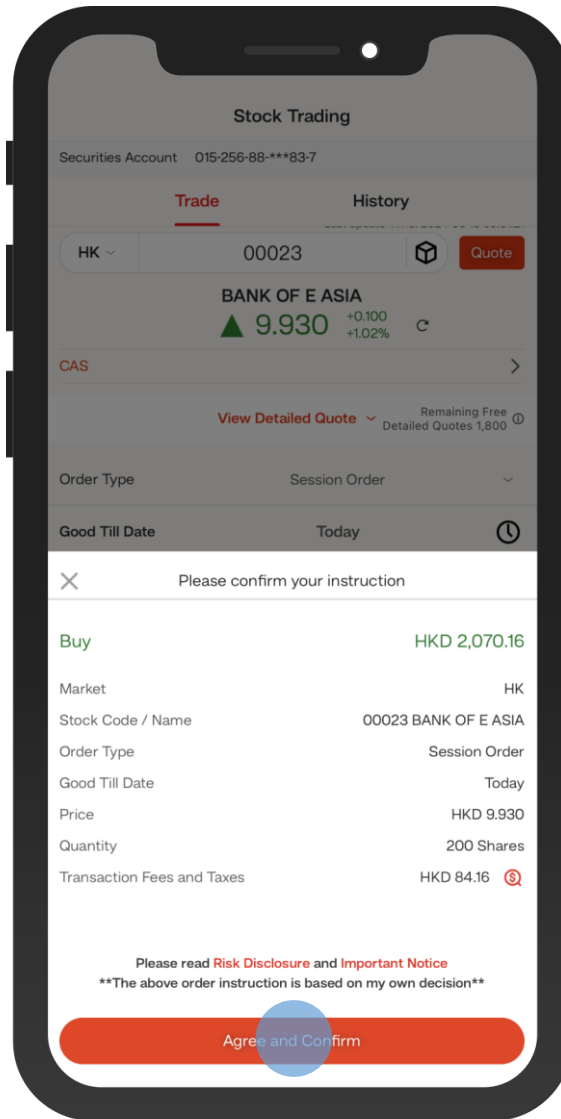


# BEA SmarTrade (4.Trade)



- 2 • Enter “Stock Code” and then select “Quote”
- Enter other order information (Order Type, Good Till Date, Price, Quantity)
- Select “Buy” or “Sell”

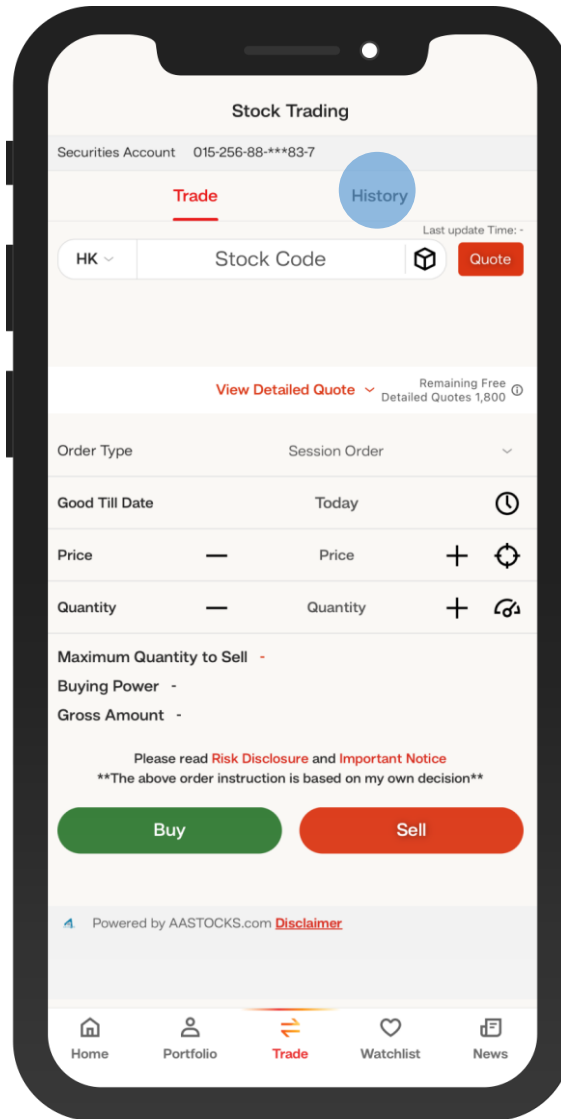
# BEA SmarTrade (4.Trade)



- 3 • Check whether the order information is correct on the confirmation page, and then select "Agree and Confirm" to submit the instruction

# BEA SmarTrade

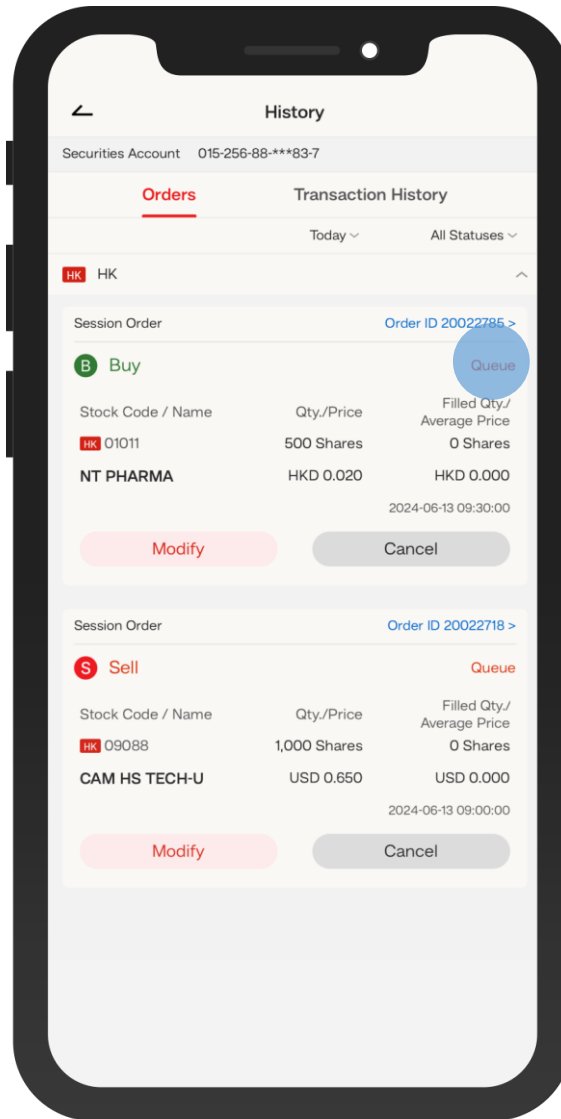
## (5.View Order Status)



- 1 • Select "History" on "Trade"

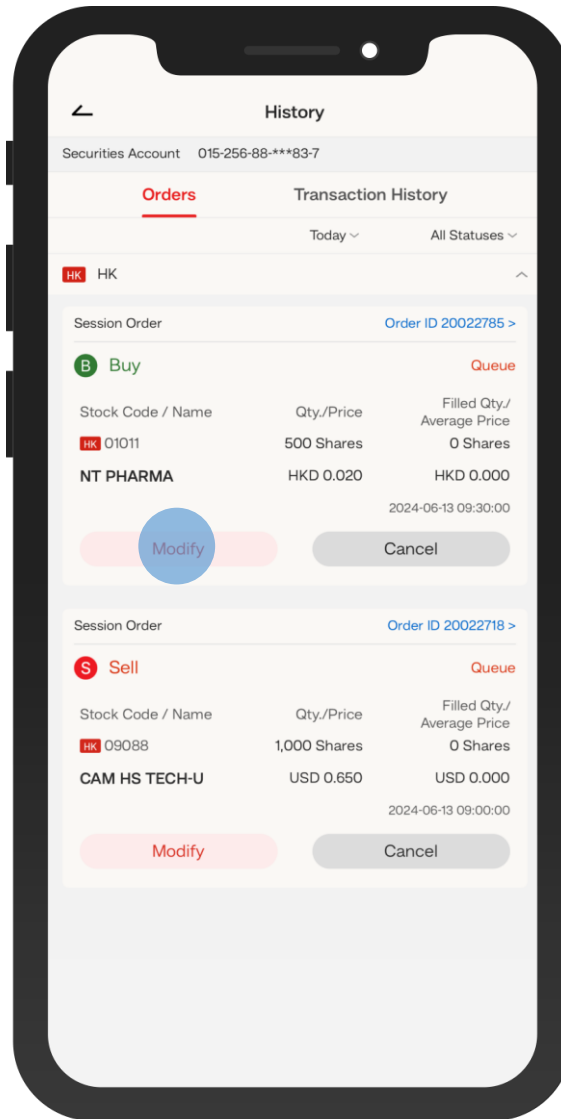
# BEA SmarTrade

## (5.View Order Status)



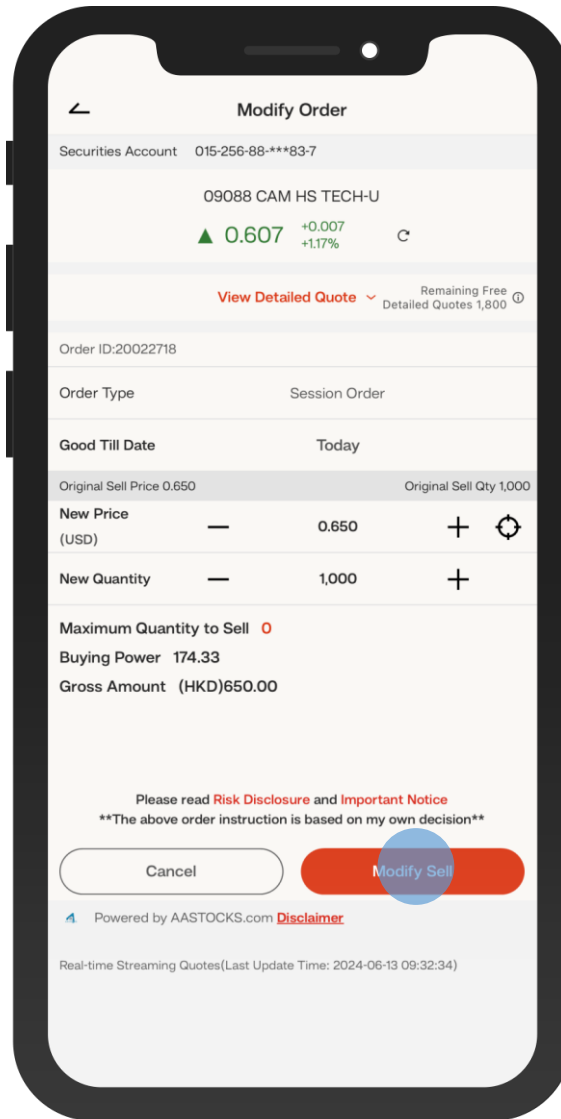
- 2 • You can check the order status on the "Orders"

# BEA SmarTrade (6.Modify Order)



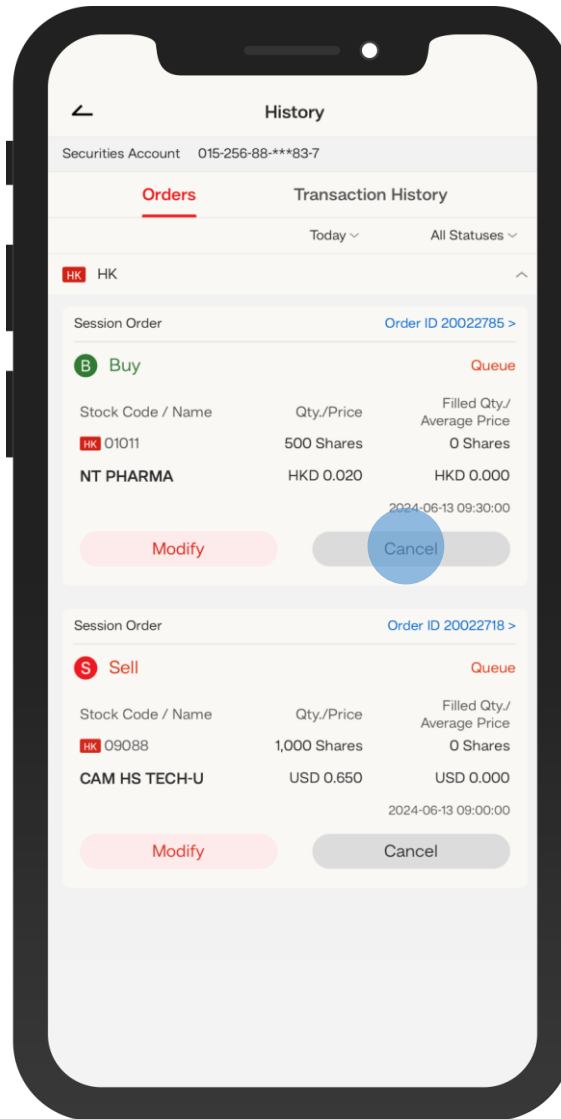
- 1 • You can modify orders that are not yet effective on "Orders"
- Select "Modify"

# BEA SmarTrade (6.Modify Order)



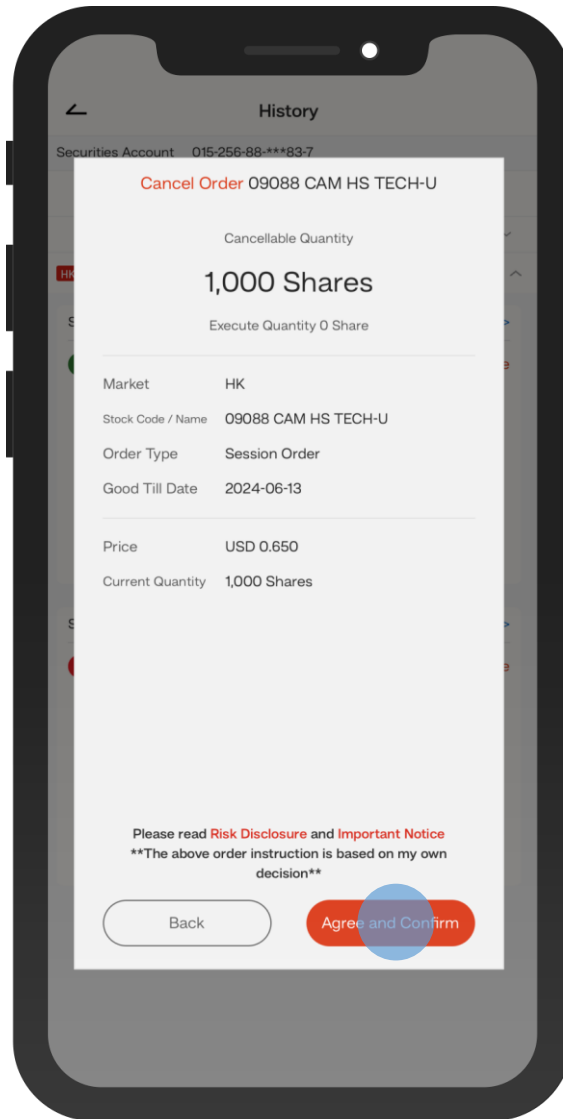
- 2 • Modify order information (Price, Quantity)
- Select “Modify Buy” or “Modify Sell”

# BEA SmarTrade (7.Cancel Order)



- 1 • You can cancel orders that are not yet effective on "Orders"
- Select "Cancel"

# BEA SmarTrade (7.Cancel Order)

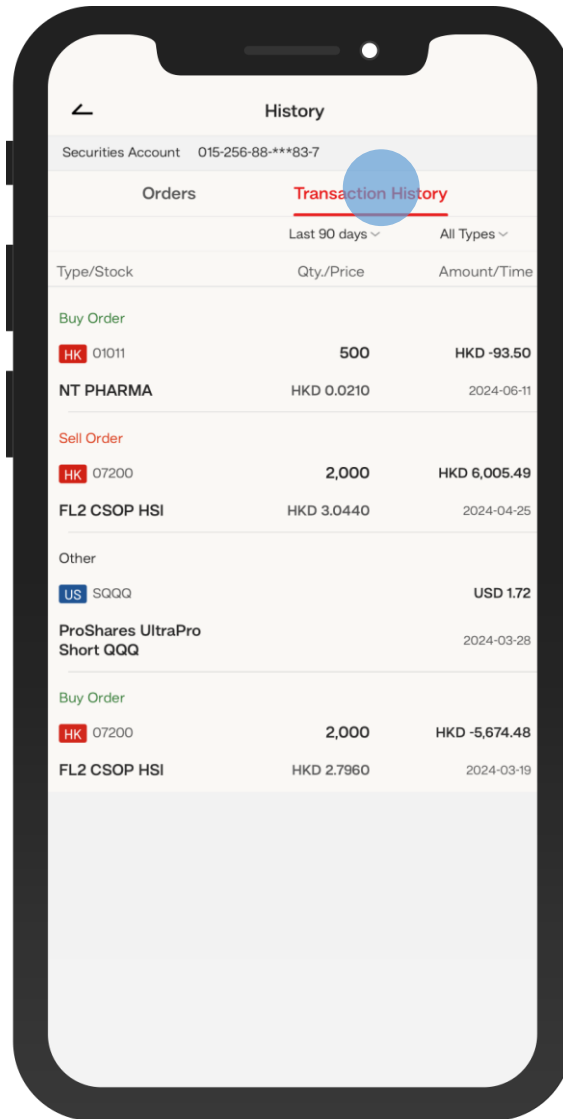


2 • Select “Agree and Confirm”



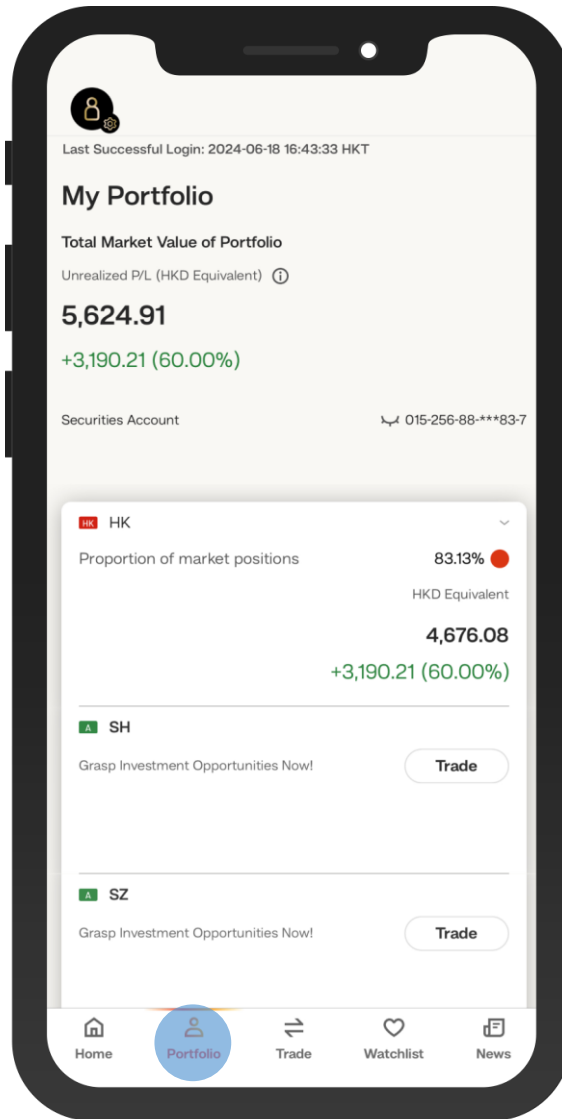
# BEA SmarTrade

## (8.Transaction History)



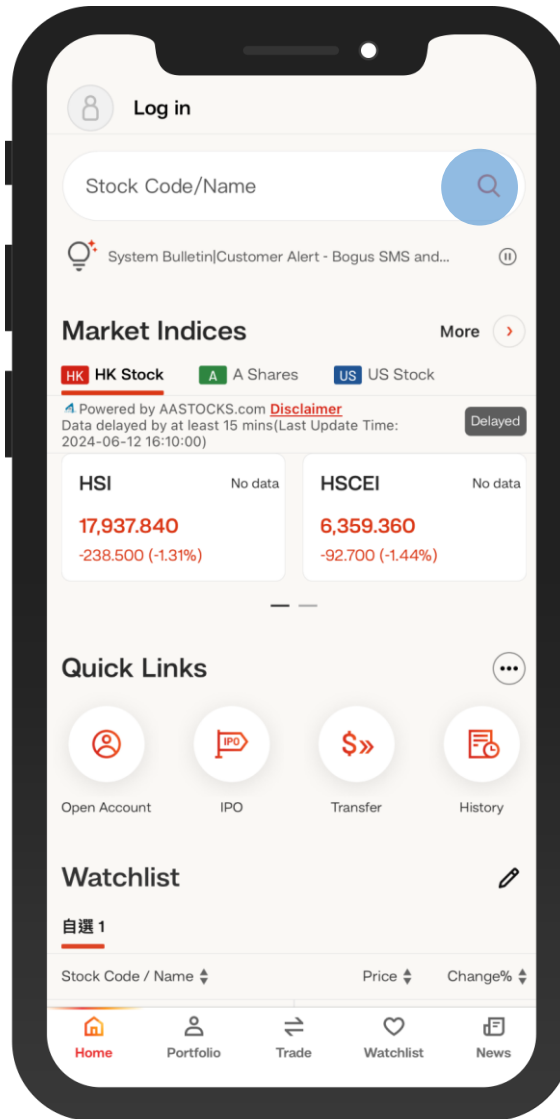
- 1 • “Select “History” on “Trade”
- You can view transaction history on the "Transaction History"

# BEA SmarTrade (9.Portfolio)



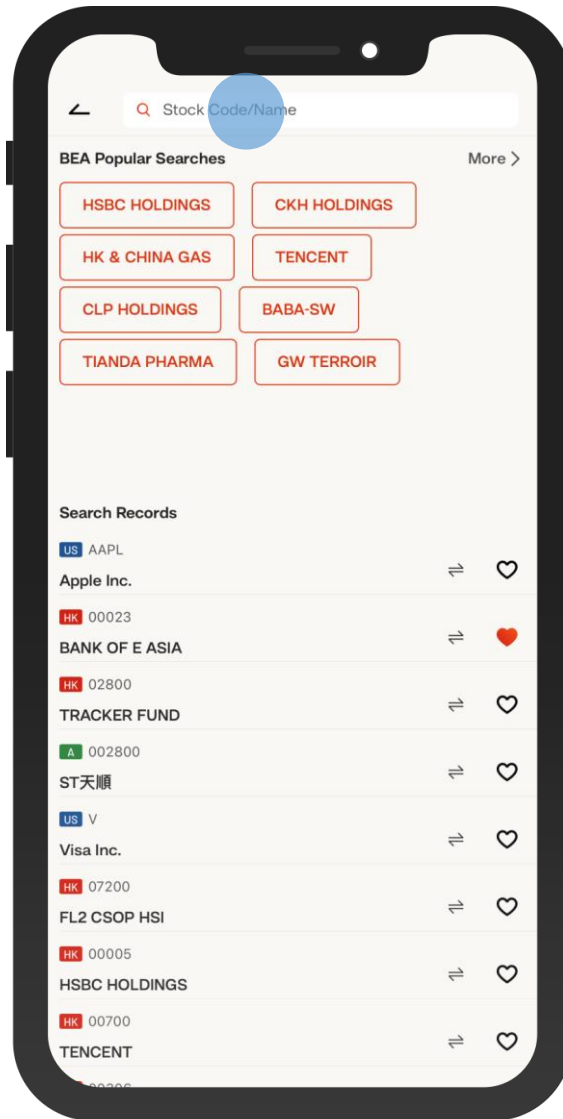
- 1 • Select "Portfolio"
- View the stocks held in your investment account

# BEA SmarTrade (10.Stock Quote)



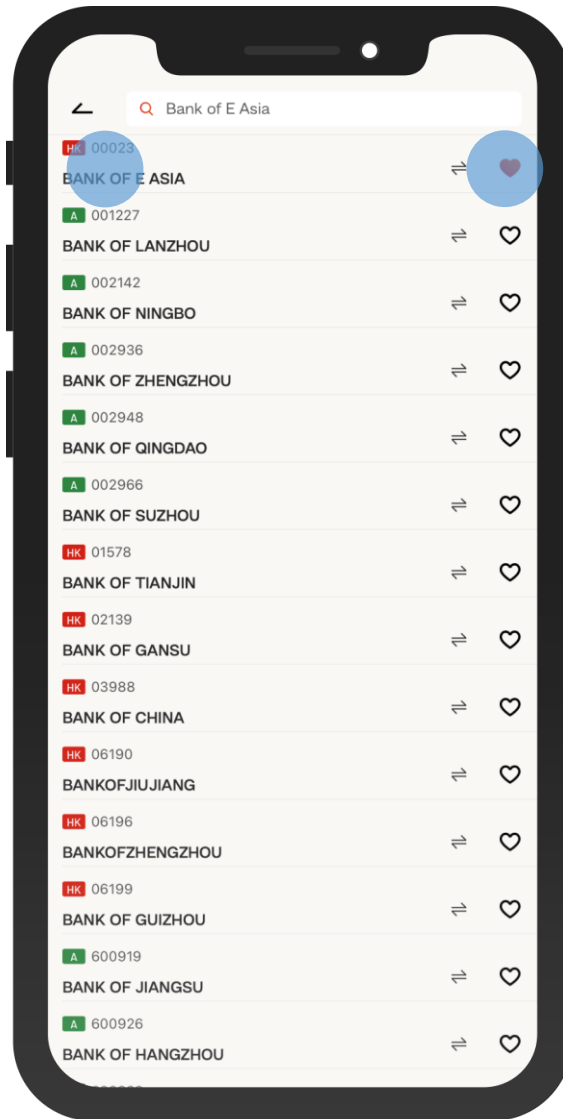
1 • Select "Stock Search Bar"

# BEA SmarTrade (10.Stock Quote)



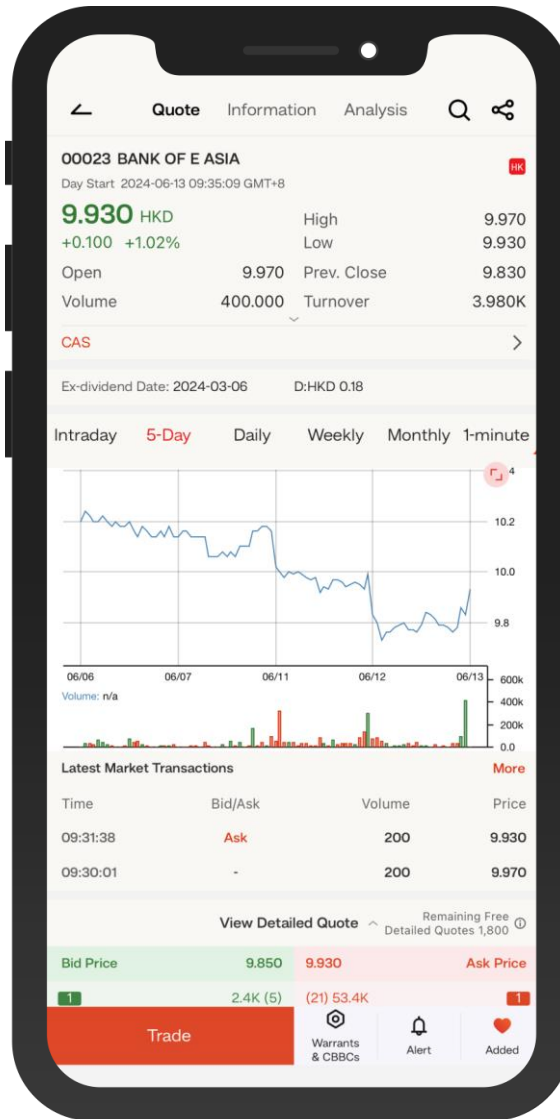
- 2 • Enter "Stock Code/Name" to search stocks

# BEA SmarTrade (10.Stock Quote)



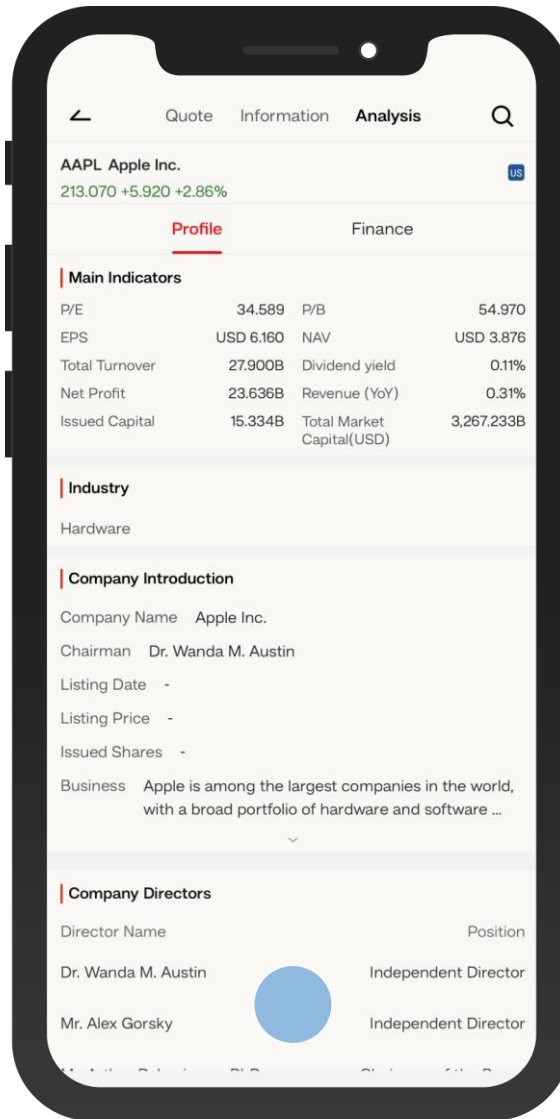
- 3
- Select the stock you want to view
  - You can also select the "Heart" icon to add stocks to the "Watchlist" group and keep track with the stocks that you are interested in.

# BEA SmarTrade (10.Stock Quote)



4 • View detailed stock quote

# BEA SmarTrade (10.Stock Quote)



- 5 • View stock information in "Analysis", such as main indicators, company introduction, company directors, financial information, etc.

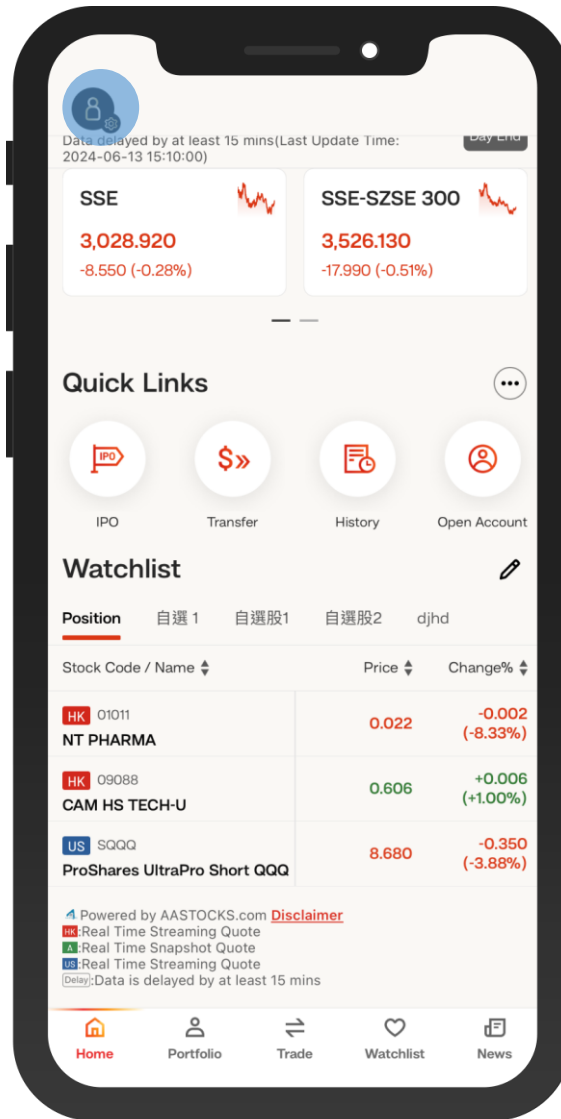
# BEA SmarTrade (11.News)



- 1 • Select "News" to view the latest market information and company news

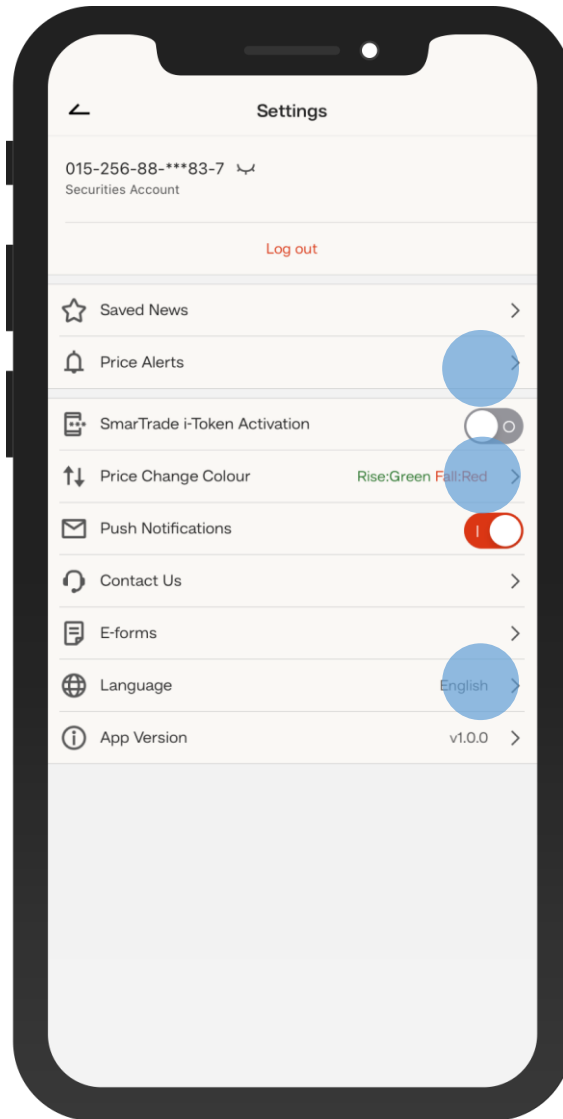


# BEA SmarTrade (12.Settings)



- 1 • Select the "Settings" icon at the upper left corner of "Home"

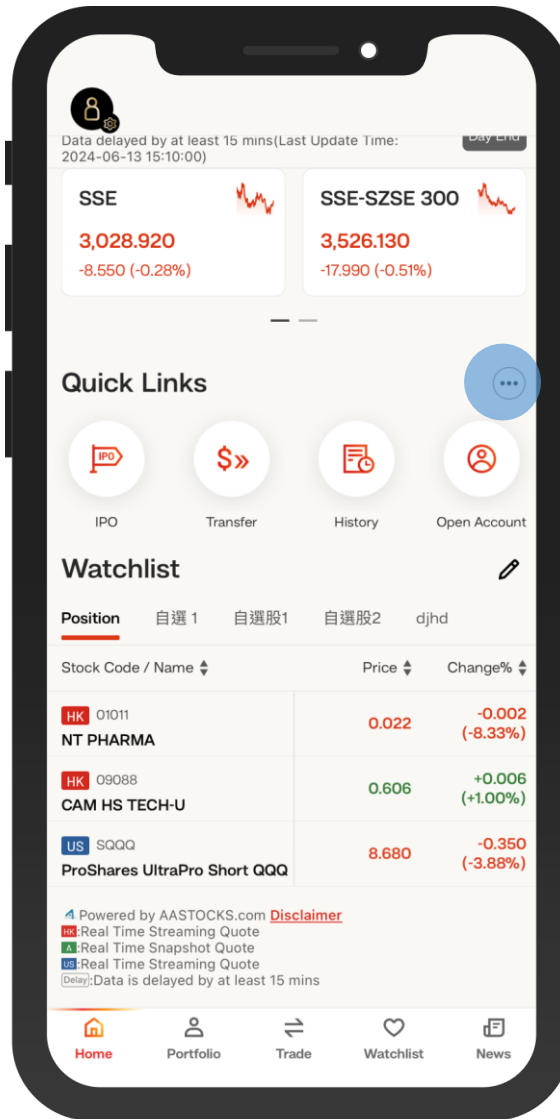
# BEA SmarTrade (12.Settings)



- 2 • You can change settings such as “Price Alerts”, “Price Change Colour” and “Language” according to your personal preferences on "Settings"

# BEA SmarTrade

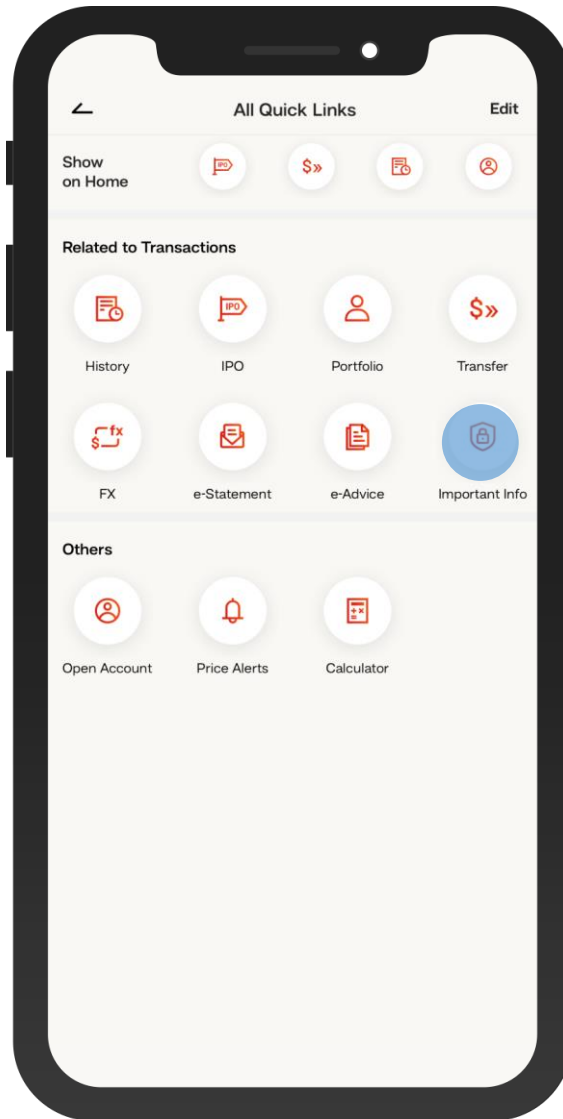
## (13.Important Information)



- 1 • Select the "More" icon of "Quick Links" on "Home"

# BEA SmarTrade

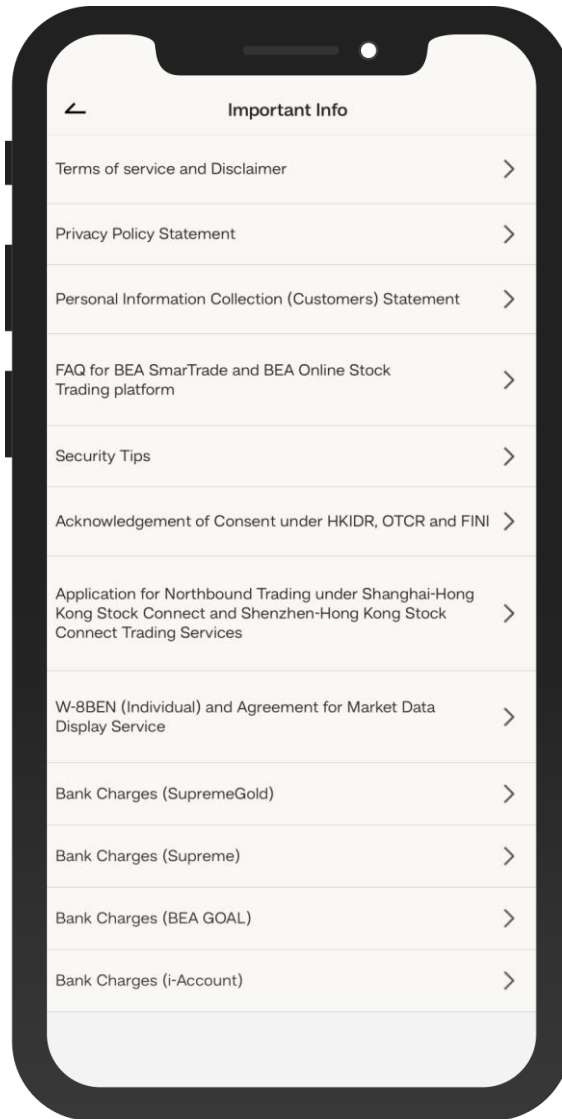
## (13.Important Information)



2 • Select "Important Info"

# BEA SmarTrade

## (13.Important Information)



- 3 • You can check important information such as terms and conditions, FAQs, security tips and bank charges on "Important Information"