

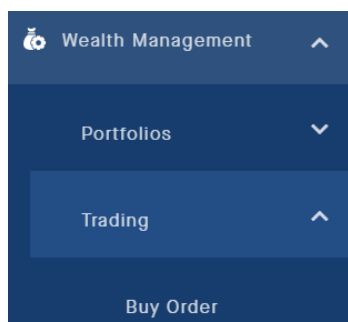
Securities Trading Guide

TURICUM Connect enables clients to place their security transactions in a broad investment universe including all main equities listed on the major stock exchanges, investment funds and exchange traded funds.

Market, Limit and Stop-Loss orders can be traded irrespective of our business hours.

How to place a Buy Order?

To place a buy order, click on the menu item 'Buy Order' under 'Wealth Management / Trading'



This will open a pop up which allows you to search the security via its ticker, security name or ISIN and to select it from a drop-down menu. Should the security not be available on the drop-down menu, then this security is not currently set up for trading and you should contact your Private Banker. Once the security has been selected you can input Order Type, i.e. Market or Limit and quantity of security you wish to buy. In case of a Limit Order, you are requested to input Limit Price and Limit Expiry Date.

Place Order X

1

2

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Security Search

Enter Details

Preview & Confirm

Portfolio ID	999999-9
Portfolio Name	John Doe
ISIN	GB00BH4HKS39
Security / Ticker	VOD VODAFONE GROUP PLC LN Equity
Last Closing Price	0.9026
Date Last Price	19 Jan 2023
Transaction Type	Buy
Order Type *	Limit
Quantity *	10000
Currency ⓘ	GBP
Limit Price *	0.89
Limit Expiry *	29/12/2023

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Preview

Click the 'Preview' button to review the order.

If details are correct, click the 'Send Order' button. Should you need to correct the order click the 'Back' button to edit your order.

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Send Order

Once the order is sent the 'Open Orders' page will open and a confirmation that the 'Order has been placed successfully' will be displayed. In addition, the buy order will be listed under 'Open Orders'.

The screenshot shows the 'Open Orders' page in the TURICUM PRIVATE BANK interface. At the top, a green banner confirms 'Order has been placed successfully'. Below this, the user's name 'John Doe' is displayed. The main content area features a table of open orders. The table has columns for Order Date, Portfolio No, Order Reference, Security Name, Order Type, Transaction Type, Nominal, and Order Status. A single entry is shown for a Vodafone Group PLC security purchase, with a status of 'Transmitted'. A sidebar on the left contains navigation icons, and the top header displays the bank logo and user information.

Order Date	Portfolio No	Order Reference	Security Name	Order Type	Transaction Type	Nominal	Order Status
04/01/2023	999999-9	OPDSC2300447499	VODAFONE GROUP PLC	Limit	Security Purchase	100	Transmitted

Should you already hold the position you wish to buy in your portfolio, i.e. increase a position, the securities purchase can be initiated directly from the valuation page under 'Wealth Management / Portfolio / Valuation'.

The screenshot shows a sidebar menu for 'Wealth Management'. It contains three items: 'Wealth Management', 'Portfolios', and 'Valuation', each followed by an upward-pointing arrow icon.

If the last column 'Actions' shows 'Buy' or 'Sell' buttons the respective security can be bought or sold via TURICUM Connect.

The screenshot shows a single cell with the text 'Actions' in a light blue background.

Buy Sell

How to place a Sell Order?

To place a Sell Order, navigate to the valuation page under 'Wealth Management / Portfolio / Valuation'.

The screenshot shows a sidebar menu for 'Wealth Management'. It contains three items: 'Wealth Management', 'Portfolios', and 'Valuation', each followed by an upward-pointing arrow icon.

Click the 'Sell' button of the respective security under the 'Actions' column.

The screenshot shows a single cell with the text 'Actions' in a light blue background.

Buy Sell

Should the security not have a 'Sell' button, the security is not currently set up for trading in TURICUM Connect and you should contact your Private Banker.

Clicking the 'Sell' button will open a pop up which allows you to input Order Type, i.e. Market, Limit or Stop and quantity of securities you wish to sell. In case of Limit and Stop Orders, you are requested to input Limit/Stop Price and Limit/Stop Expiry Date.

Place Order

1

2

Enter Details

Preview & Confirm

Portfolio No	999999-9
Portfolio Name	JOHN DOE
ISIN	CH0012138530
Security / Ticker	CREDIT SUISSE GROUP AG
Last Closing Price	2.719
Date Last Price	22 Feb 2023
Transaction Type	Sell
Order Type * 	Market
Available Quantity	1400
Quantity *	100
Currency 	CHF

Cancel

Preview

Click the 'Preview' button to review the order.

If details are correct, click the 'Send Order' button. Should you need to correct the order click the 'Back' button to edit your order.

Back

Send Order

Once the order is sent, the 'Open Orders' page will open and a confirmation that the 'Order has been placed successfully' will be displayed. In addition, the sell order will be listed under 'Open Orders'.

Need assistance?

Your Private Banker will be happy to assist you, should you experience any issues when placing an order. Please note that there is no out-of-hours support for trading.

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