"FAQ

Phillip9 Mobile Trading application allows users to trade seamlessly in all market segments under a single login. This is a complete trading solution to provide a fast and integrated trading experience to the end-user.

For example, some of the basic features which the investor would be able to do are highlighted below:
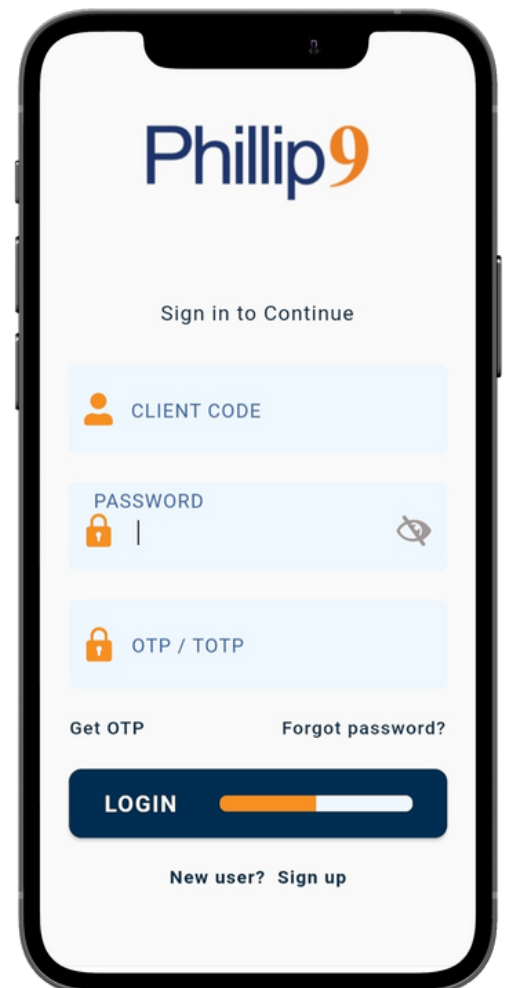
- Place Orders
- Modify, Cancel Orders
- View Order Book
- View Trade Book
- View Quotes
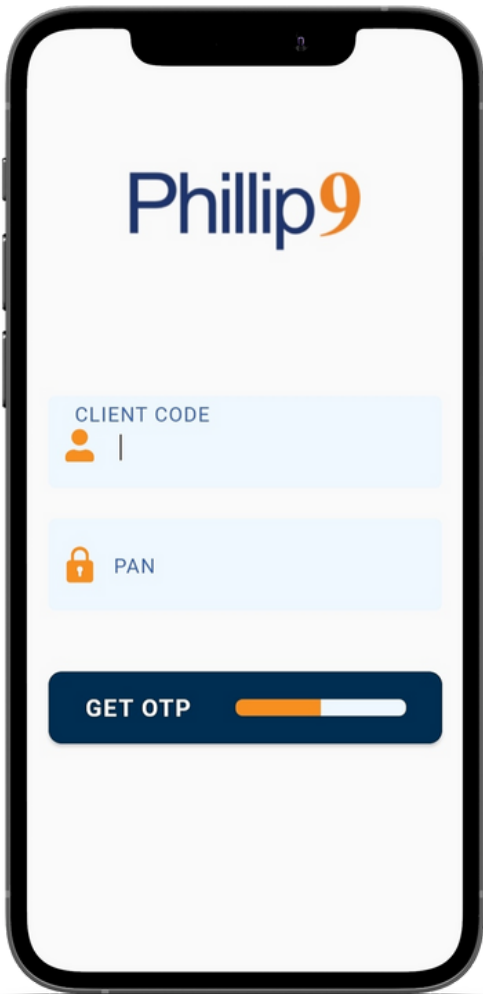- View Intraday Charts

1. How can I login into Phillip9

Following are the steps to log into Phillip9 mobile application.

Step 1: For the first time, login into Phillip9 mobile app user needs to generate OTP.
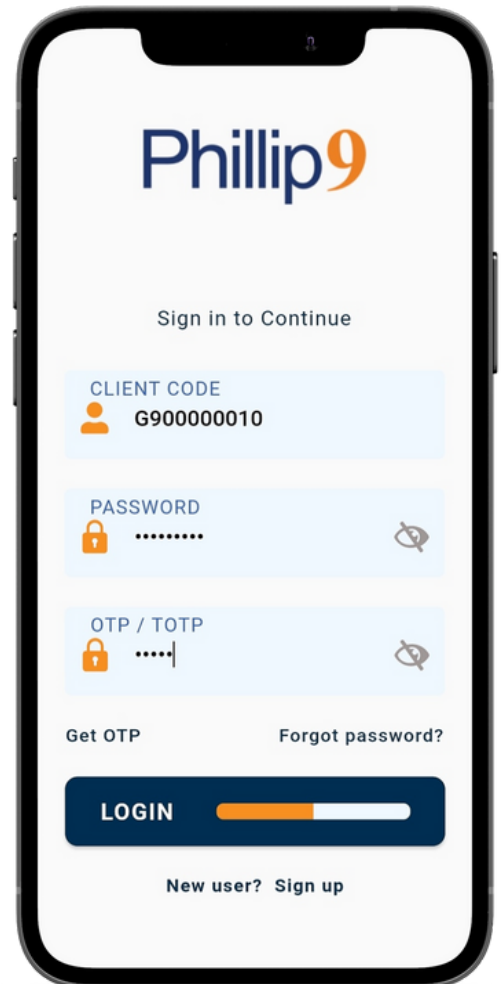
Phillip9 Demo Video Link

Phillip9

Phillip9
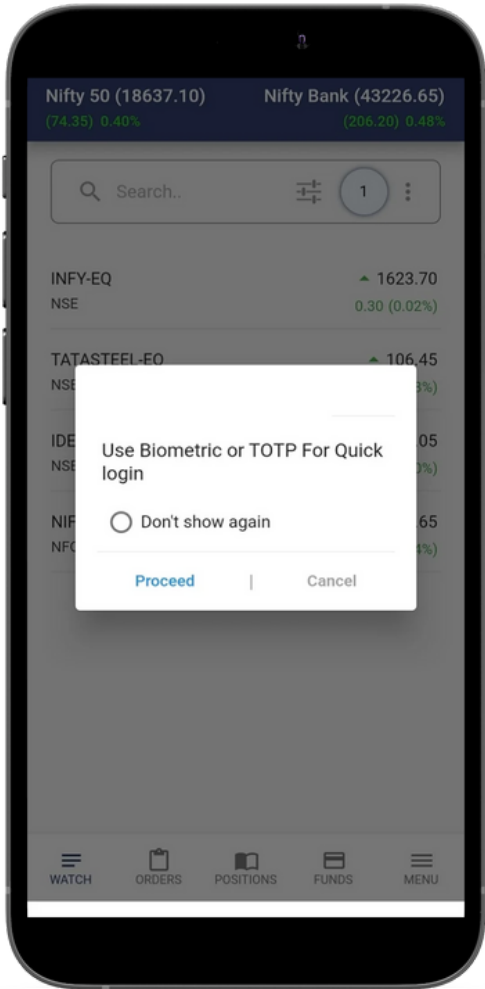
CLIENT CODE

PAN

GET OTP

Click on the "Get OTP" option. Please enter the Client code and PAN number to receive OTP on the registered email id and mobile number.

Step 2: Enter your Client code, Password and OTP received on your email id/mobile to login into Phillip9
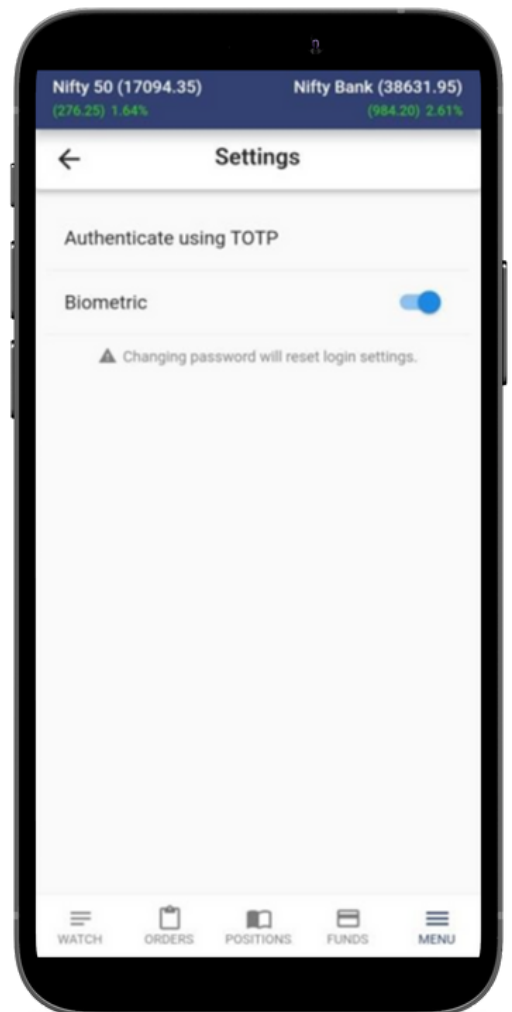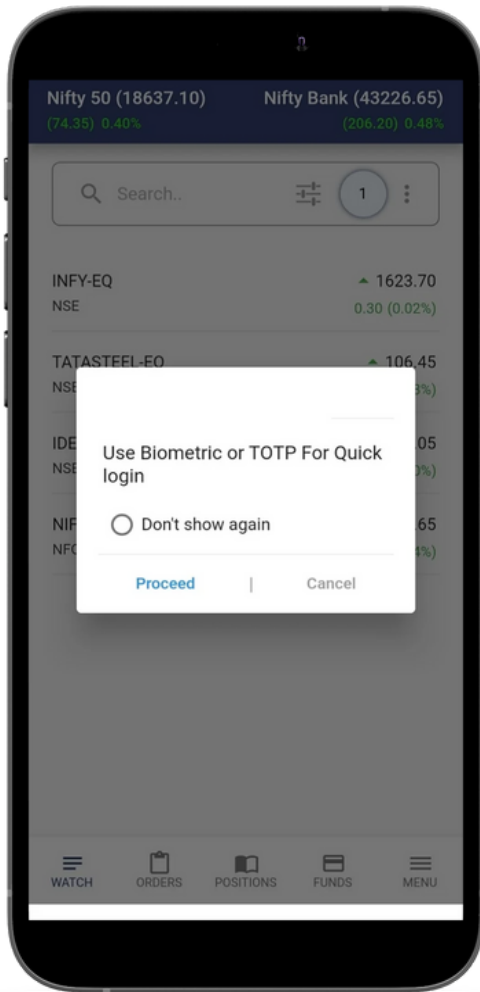
Phillip9

Sign in to Continue

CLIENT CODE
G900000010

PASSWORD
....

OTP / TOTP
.....

Get OTP   Forgot password?

LOGIN

New user? Sign up

Step 3: Upon successful login into the Phillip9 application, the user can enable either Biometric or Time Based Otp (TOTT) to login instead of requesting an OTP every time before login.

Enabling Biometric Authentication:

Biometric can be enabled from the Setting option under "Menu Window".

Phillip9

Once Biometric is enabled, Phillip9 will first authenticate your Biometric (Fingerprint) and then the user will be asked for the Client code and password to login.

Login via Time Based One Time Password (TOTP)

TOTP is provided by online third-party TOTP apps. Apps generate TOTP which stays valid for 30 seconds to do login. Following apps can be downloaded to generate TOTP on mobile phones:

- Google Authenticator (Android Download link/ IOS Download link)
- Microsoft Authenticator (Android Download link/ IOS Download link)

Once Phillip9 login is done. TOTP can be enabled from the Settings option under Menu Window.

Click on 'Authenticate using TOTP' and then click on 'Add to Authenticator' to open Google Authenticator to register QR code can be scanned from Google Authenticator to register.

At the time of login, enter the TOTP generated on the authenticator app on your mobile phone and continue to Login.
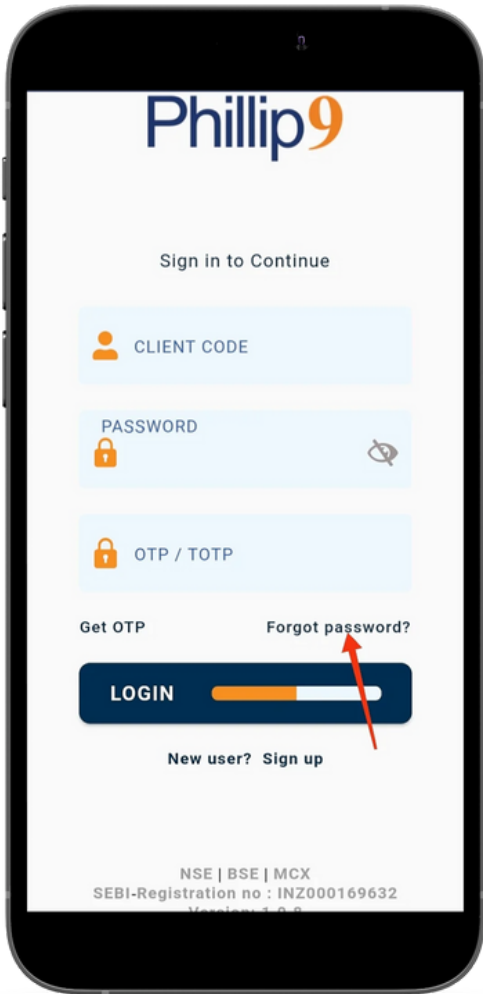
Phillip**9**

## 2. How can I change or reset and my Phillip**9** password?

In case the user forgets the login password, the user can use the "Forgot password Link"

Phillip**9** Demo Video Link

Steps to change the password.

1. Click on Forgot password link
2. Enter Client Code, PAN and DOB in DDMMYYYY format and click on Reset
3. New password will be sent to your registered email id & mobile number by SMS.
4. Enter the new password received and click on GET OTP, enter your PAN and click on GET OTP, please enter OTP and click on login.
5. Enter the old password of Phillp9, enter your desired password in the new password section and to verify please enter again your new password in confirm password section, by doing this user will be able to change password.
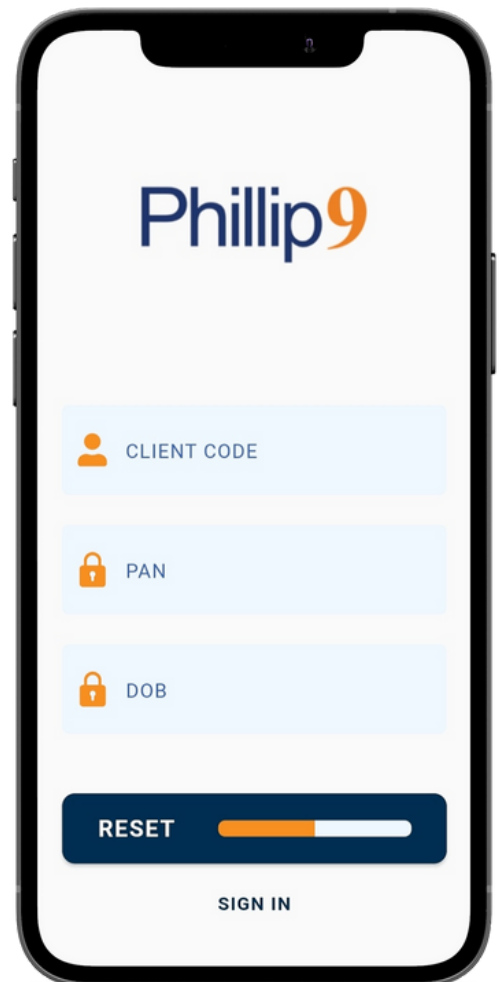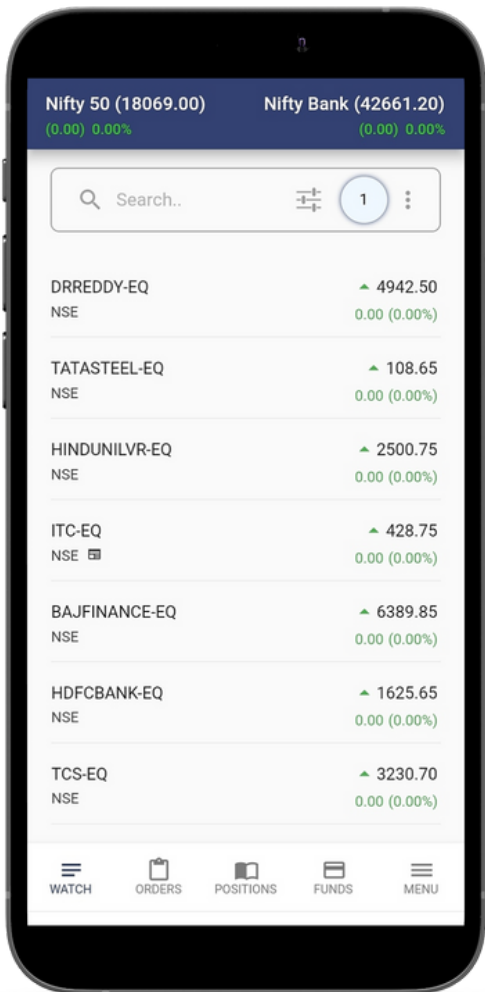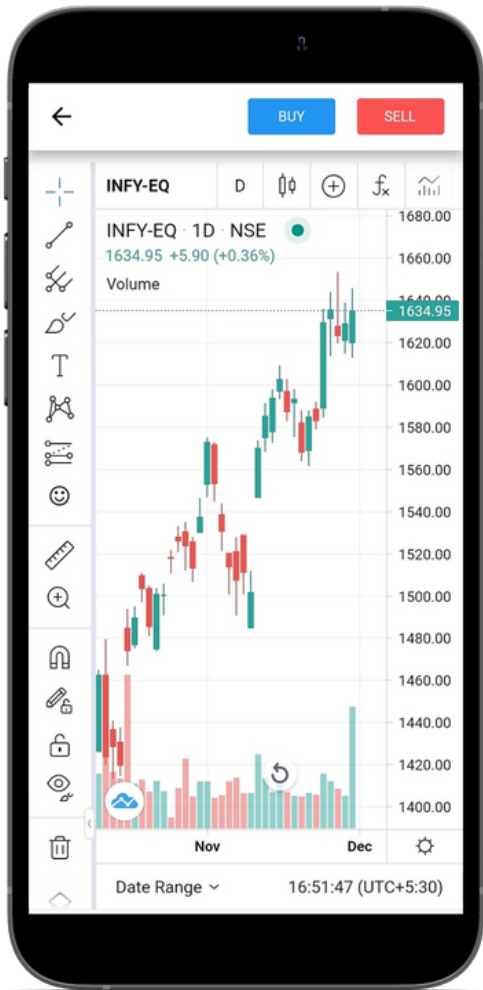
Phillip9

3. How can I explore market watch in Phillip9 ?
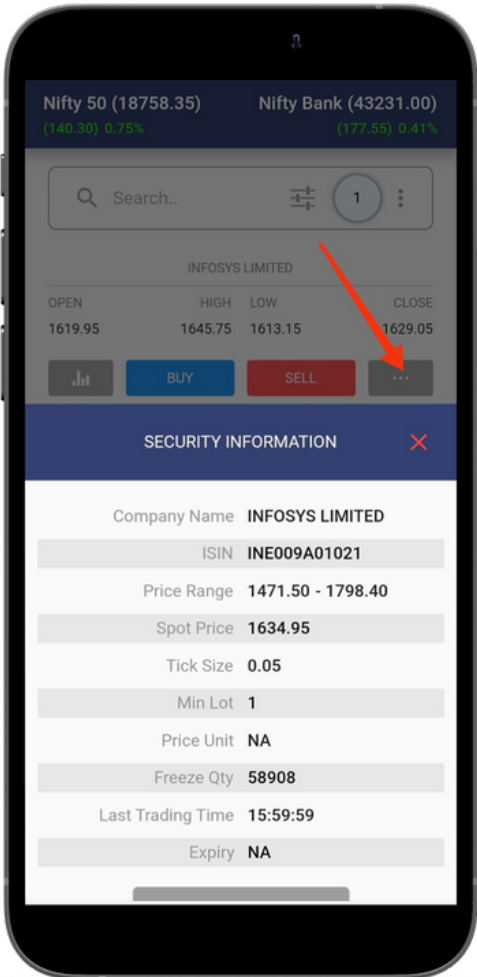
Phillip9 Demo Video Link

3.1) Market Depth: Market Depth shows all the details of the selected contract/scripts like open, high, low, close, volume, best buy price & quantity, and best sell price & quantity.
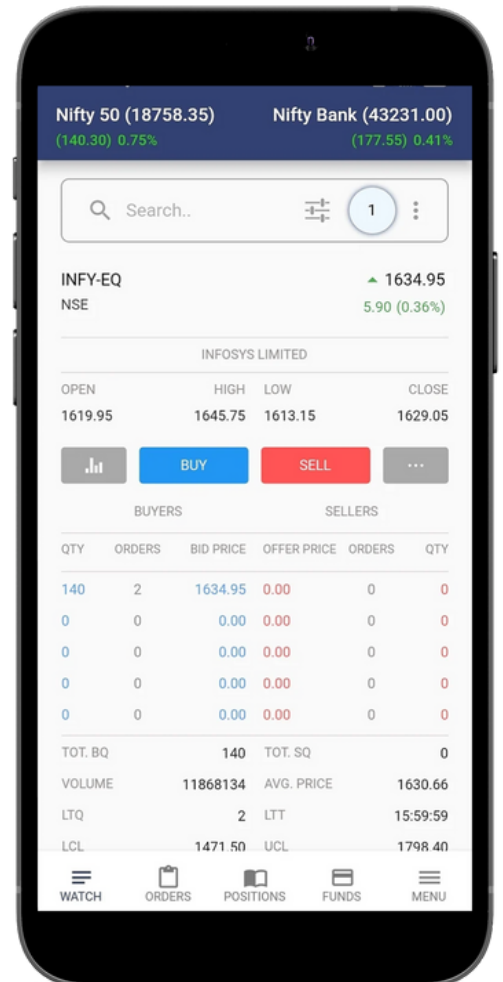
3.2) Charts: Under the Chart section, the user can click on the chart to view an intraday /1 day /1 week /1-month chart of Scrip.
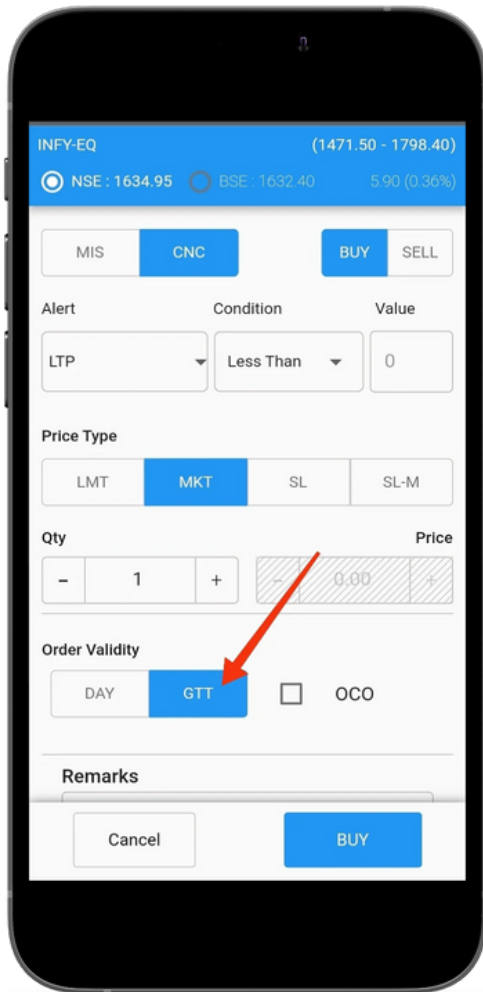
3.3) Security Information: This tab will give details information on the scrip like Name, ISIN, Price Range, Tick Size, Freeze quantity, etc.
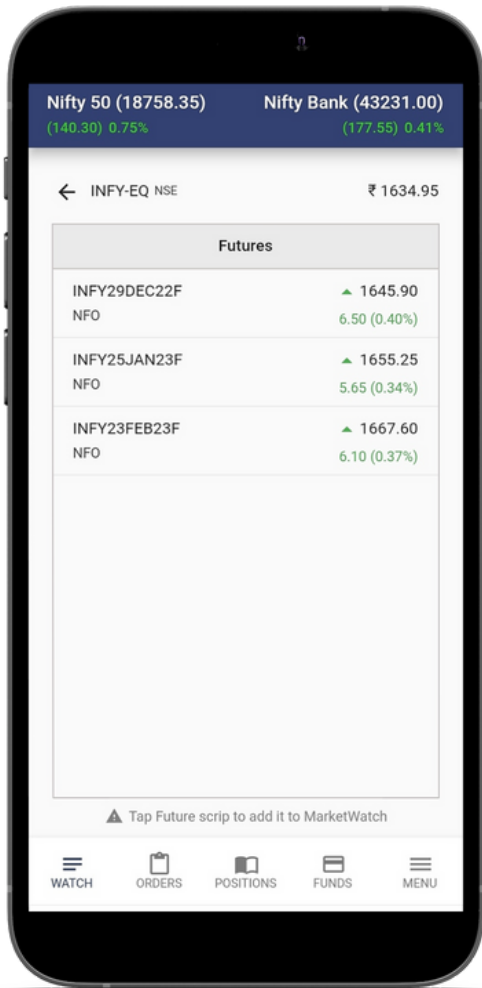
3.4) GTT order: User can place a GTT order (Good Till Triggered) with your desired combination and condition.

**3.5) Option Chain:** User can view the option chain glance and place a Buy /Sell order of that particular script & indices.
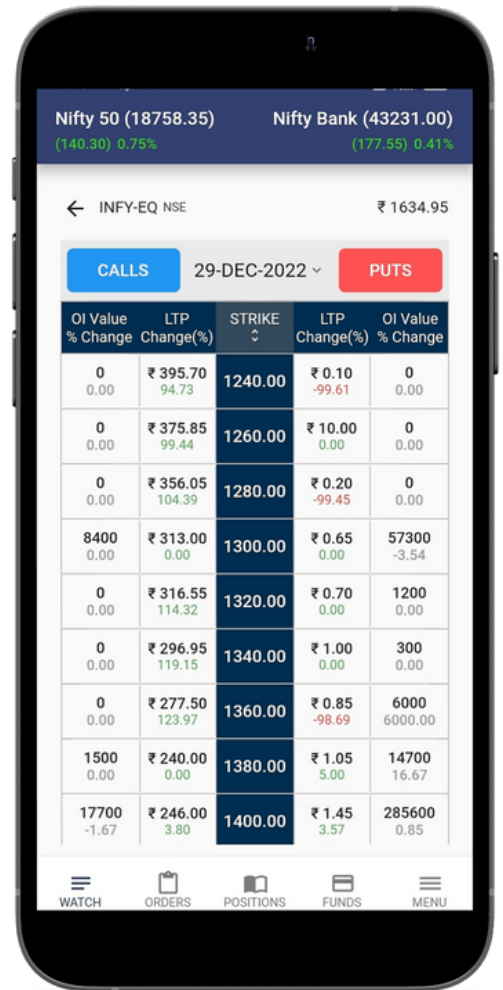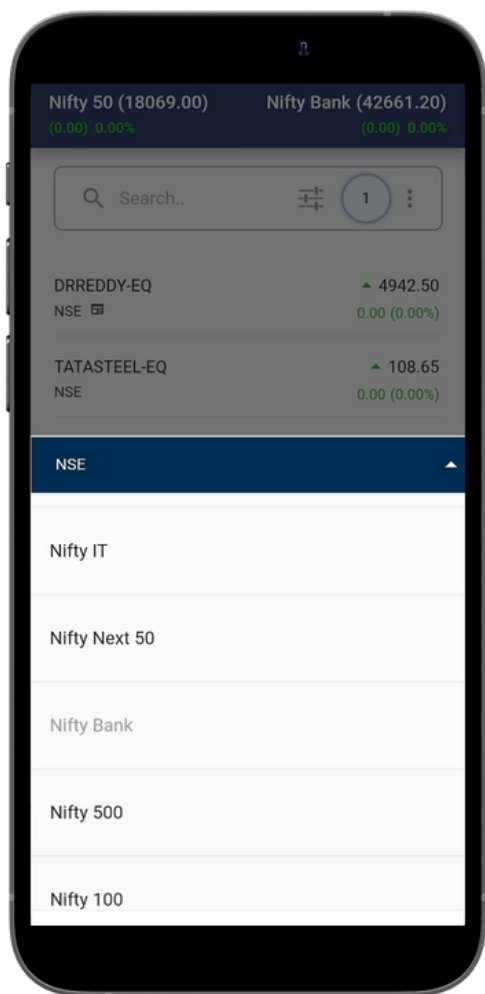
3.6) Futures: User can view three months future series of scrip /indices, Tap on future scrip/ indices to add it to market watch.

3.7) Set Alert: User can set an alert with the desired combination & condition. Once an alert is triggered can be seen in the "Alerts Window " under "Menu ".
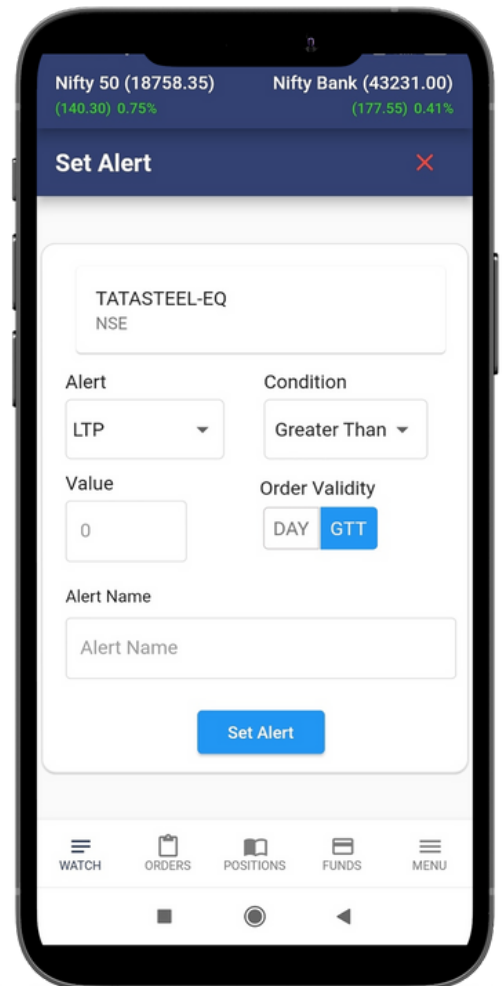
# 4. How to add Indices and Add & Remove Scrip?

4.1 Add Index

Two indices can be added on top. Clicking on any index will open a list of indices, the user can select any particular index that which user wants to configure and will be replaced with an existing index.
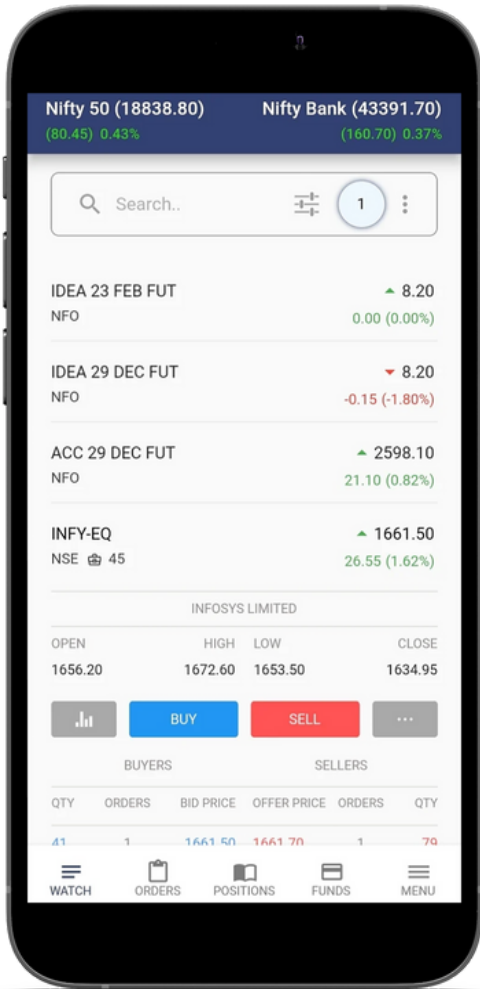
Phillip9 Demo Video Link

4.2 Adding/ Removing Scrips in Market Watch

Adding scrip is easy in market watch, users can simply search for the name of the company or symbol, the system will suggest. This is a global search bar that allows users to select every contract from equity, futures, or options of underlying. The "Add" button helps in adding scrip/indices into the market watch. The "Remove" button helps in removing scrip/indices. Users also have an option of the "Delete" button to remove scrip/indices from market watch
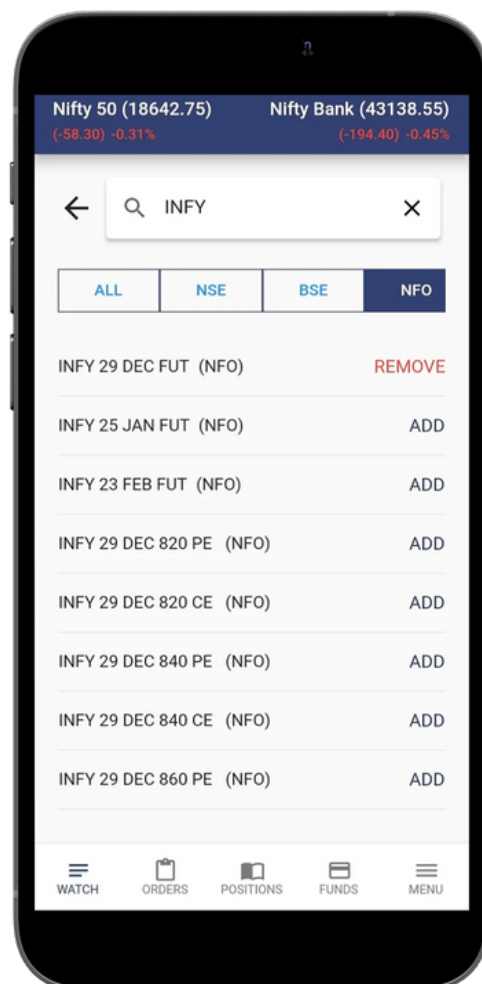
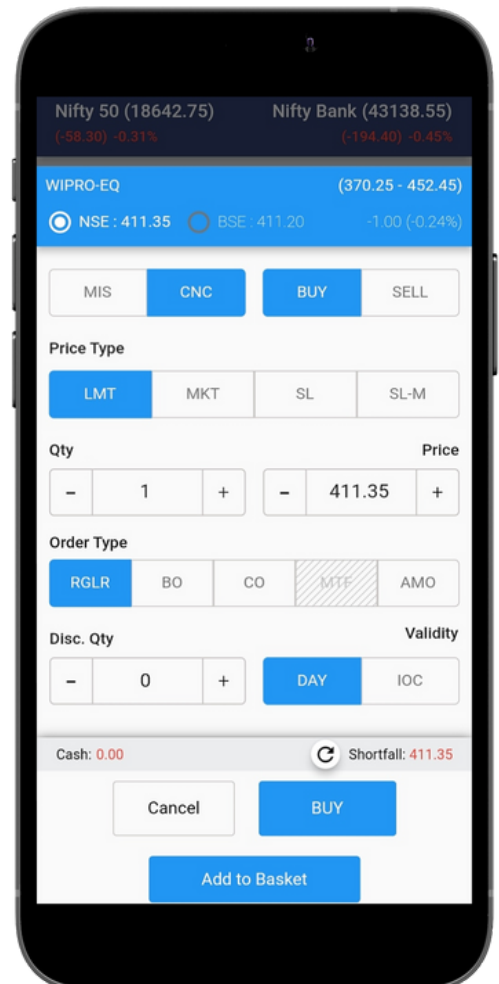## 5. How can I place an order using Phillip9 ?

5.1 Order Placement

Order placement can be done from Buy/ Sell option available in the market watch after clicking on any scrip/Indices.
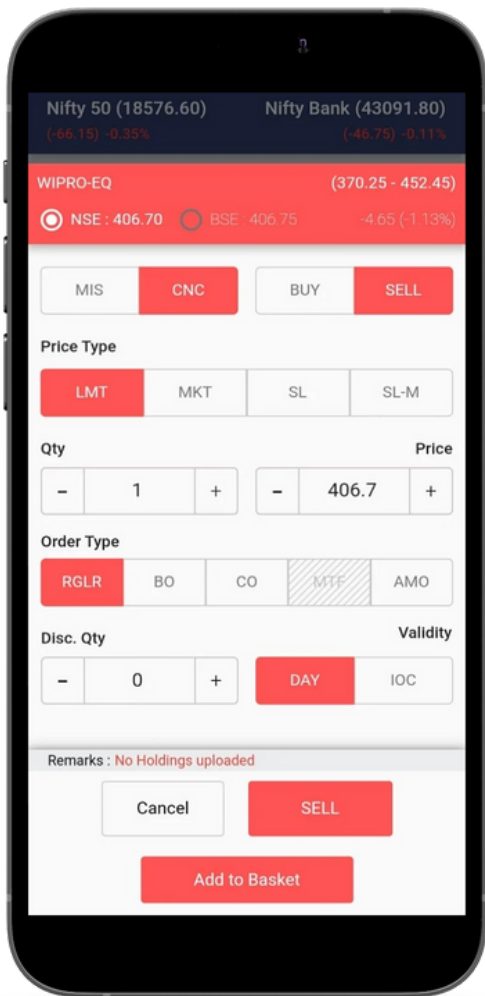
Phillip9 Demo Video Link

5.2 Buy Order

To place a Buy order, the user needs to click on the Buy order window where the user needs to fill in different parameters for placing a Buy order.

5.3 Sell order

To place a Sell order, the user needs to click on Sell order window where user need to fill different parameters for placing Sell order.

5.4 Cover Order

A Cover Order is an order which is placed along with a Stop Loss Order, in Cover Order the buy/sell order can be a Limit/Market Order accompanied by a Stop Loss in a specified range, even trailing stop loss can be enabled for Cover Order.

Phillip9
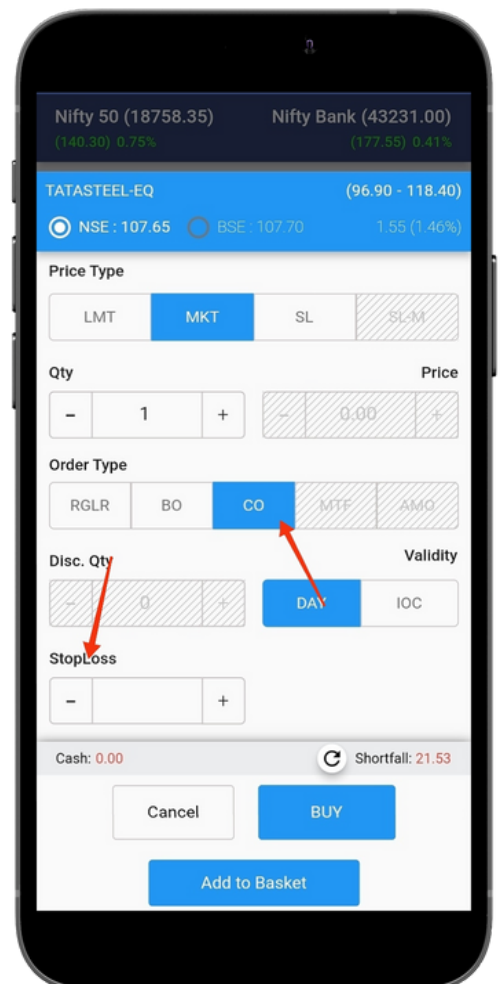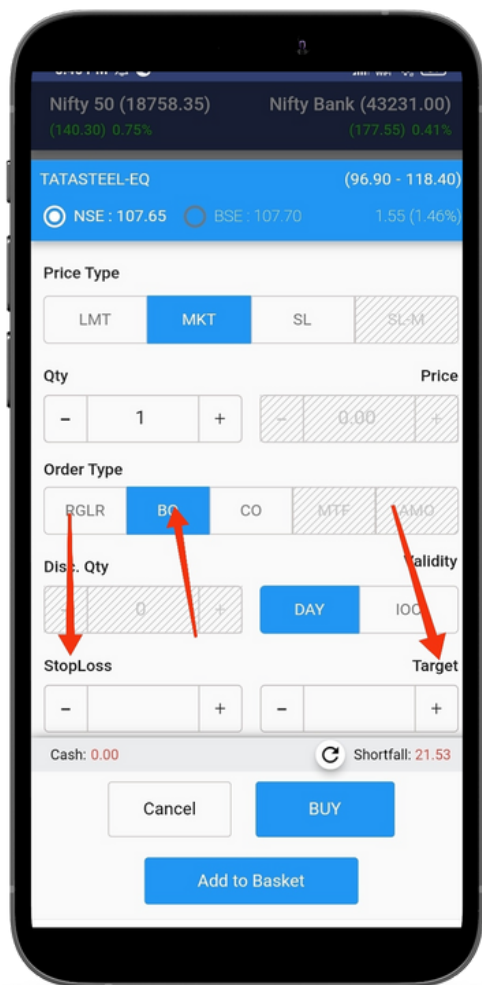
5.5 Bracket Order

A bracket Order where users can enter an order along with an Exit price and stop loss price.

Buy Bracket order is placed with higher-side sell limit order and a low-side sell stop loss order. Sell Bracket order is placed with higher -side buy stop loss order and a lower-side buy limit order, even trailing stop-loss can be enabled for Bracket Order.

6. How to manage Order?

6.1 Pending Order Book

Order book will give information regarding the timing of the order, scrip name, quantity, price, and status of the order. An open window will display orders which are pending. A "Complete" window will display orders which are executed completely & successfully. "All window" will display pending orders, cancelled orders, completed orders & rejected orders.

Phillip9 Demo Video Link
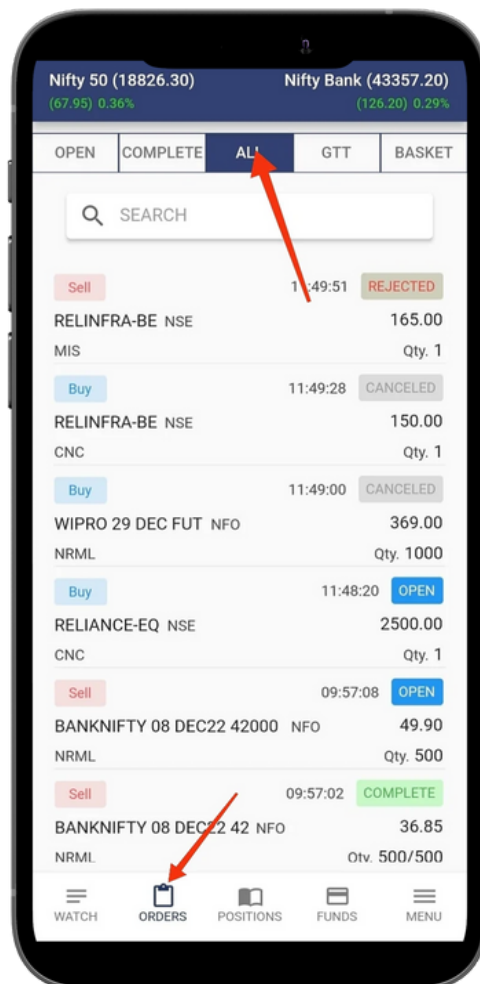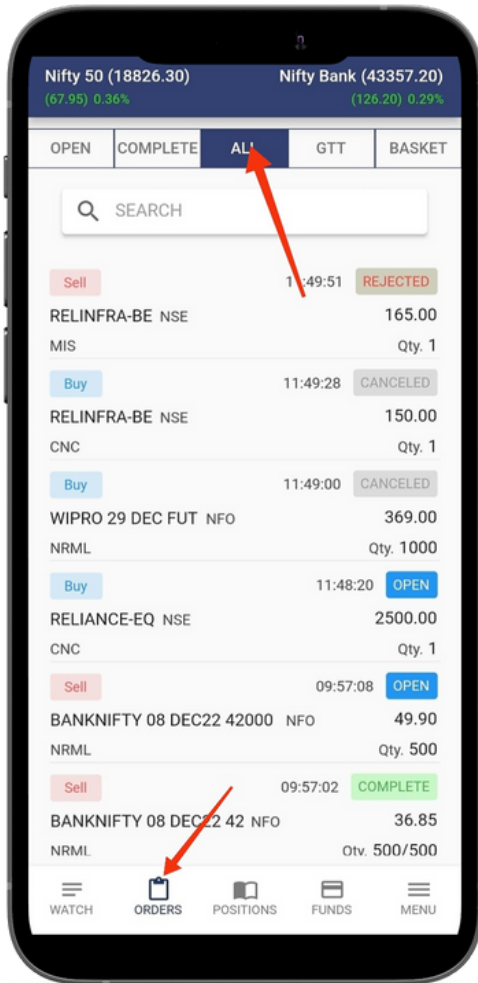
6.2 Options in Order book

Users can view four options in the pending order book window, Modification / Cancellation, information and Cancel all orders. The Search bar window will help for searching any order from the order book.

6.3 Order Modification

User can modify pending orders, it can be done by clicking on the modification option available from the pending order book.
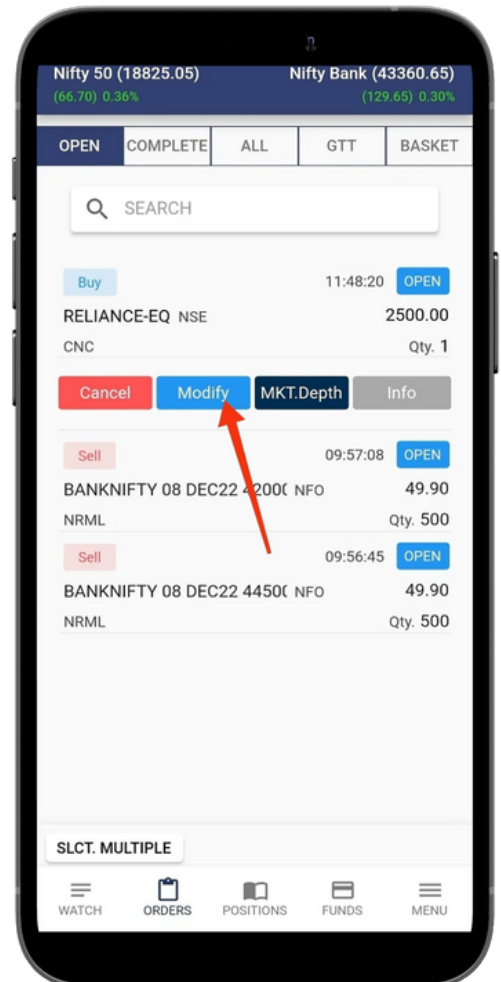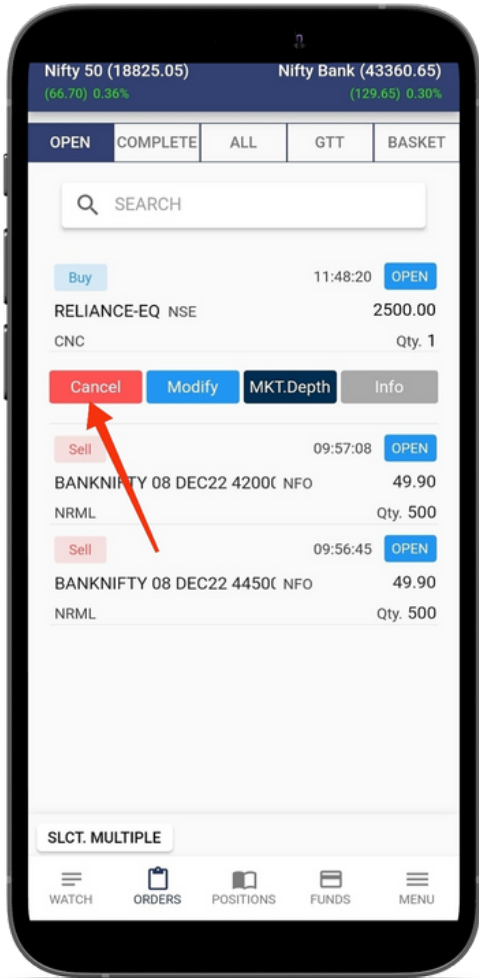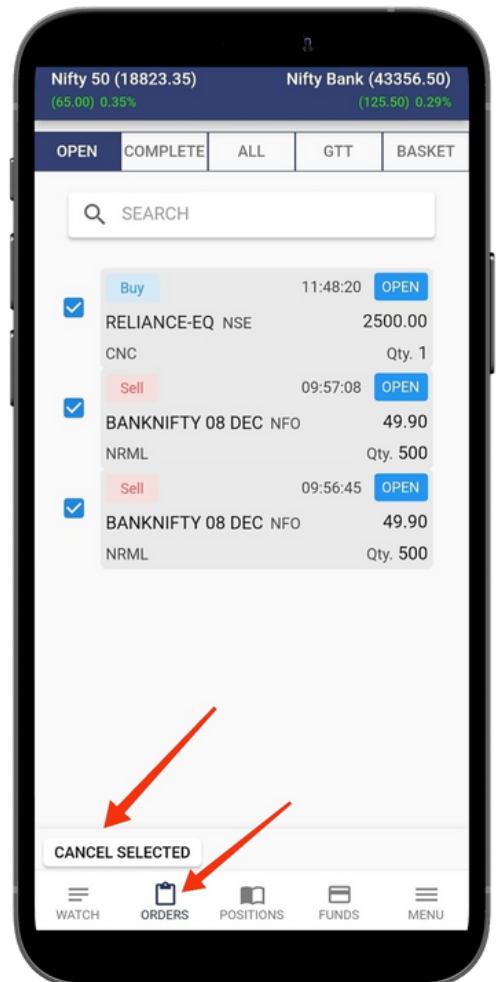
6.4 Cancel Order

Pending orders can be cancelled by the user with a click on the "Cancel Tab".

6.5 Cancel All

User can cancel all pending orders or a few selected pending orders by clicking on the check box and can cancel multiple pending orders at one go.

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7. How to check the Trade book?

In the trade book, the user will be able to view those trades which are executed successfully in the market. The "Open" window will only display trades that are pending. The "Complete" window will only display trades that are executed successfully. The "All" window will display cancelled orders, complete orders, and rejected orders.

Phillip9 Demo Video Link
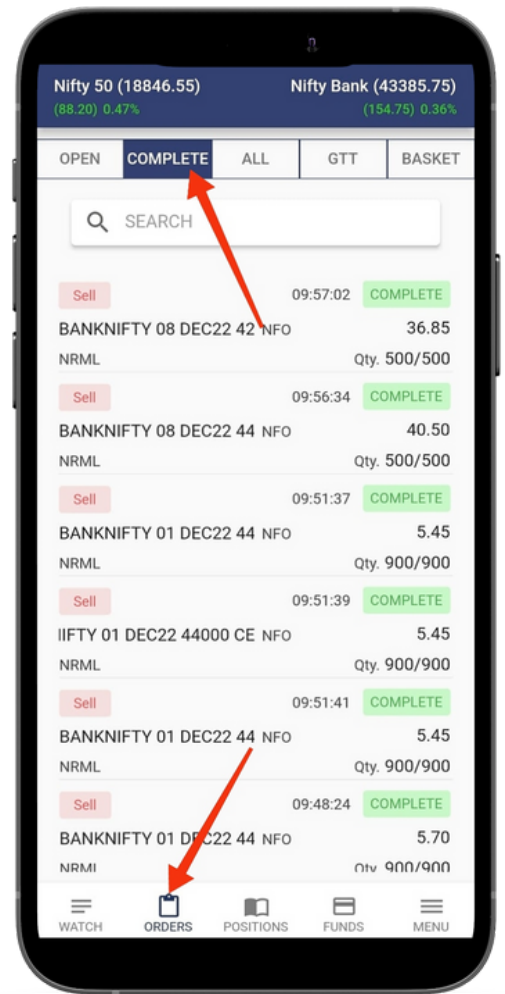
8. How do I check my Margins/ Funds on Phillip9 ?

1. Balance beginning of the day
2. User can check the available margin before entering a new trade and view margin used post trade.
3. User can also view Peak Margin during the day

Phillip9 Demo Video Link
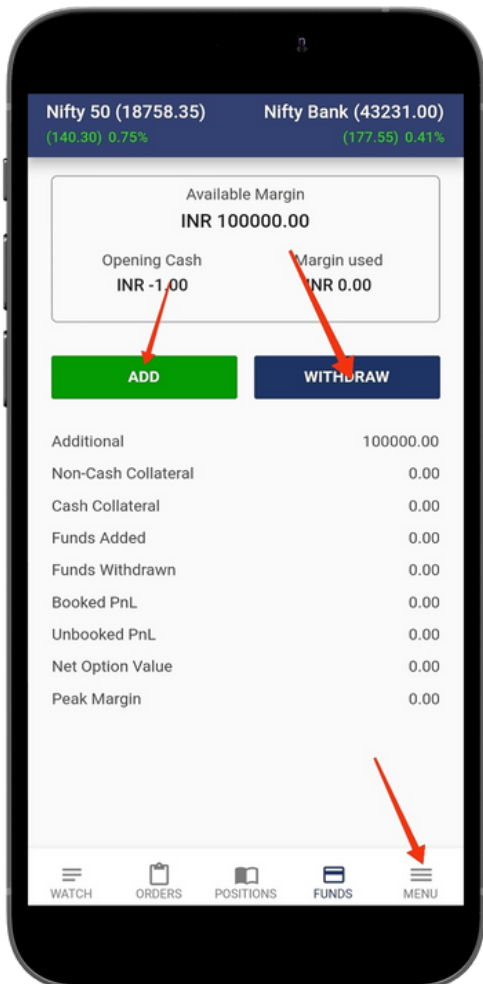
Phillip9

9. How do I see my Positions and Holdings in Phillip9 ?

1. Click on the Position Tab
2. Users can view their current position in Cash & Derivatives Segment
3. Click on Holdings Tab
4. Users can view all your holdings in Cash Segment.

Phillip9 Demo Video Link
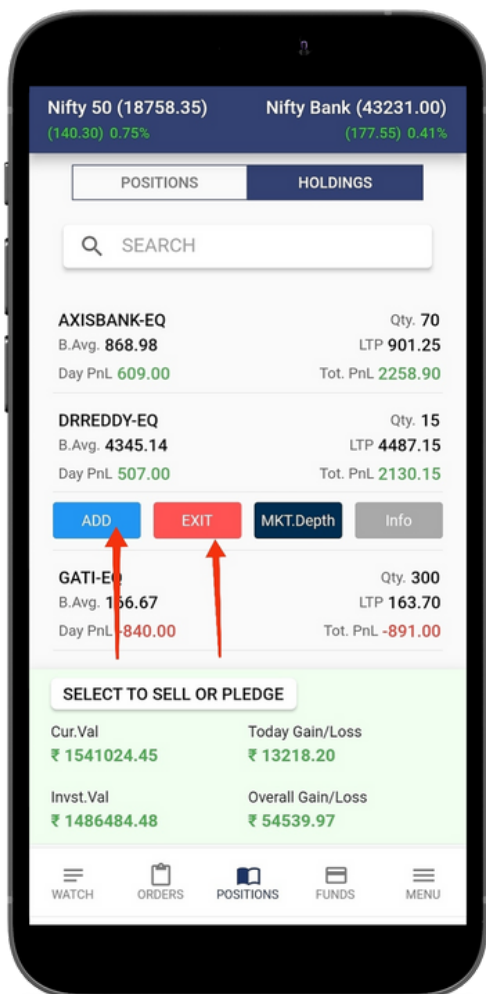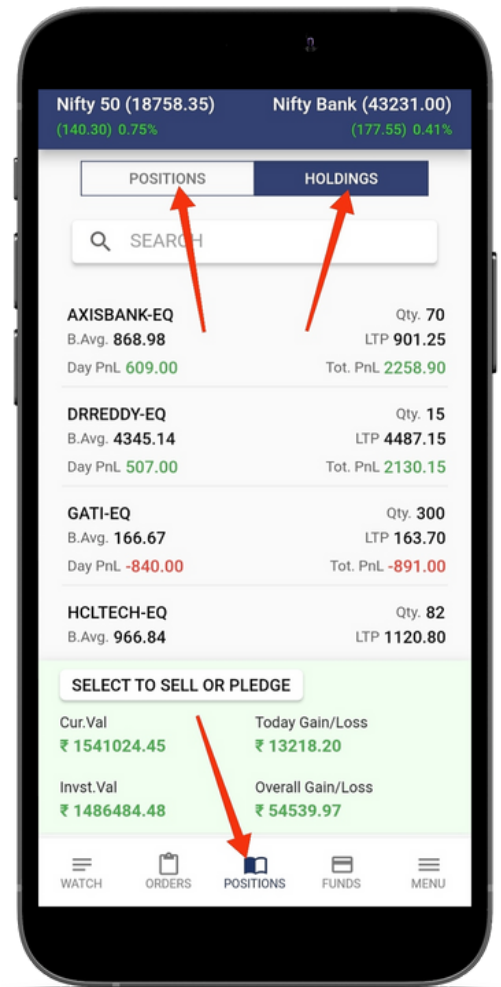
9.1 Add and Exit

User can click on Add or Exit Tab for adding or exiting the existing position. A new buy /sell order window will appear, in which the user needs to fill in the different required parameters for placing an order.

9.2 Position Conversion

This option allows the user to convert the open position from Margin Intraday Square-off (MIS) order type to Cash and Carry order type and vice versa
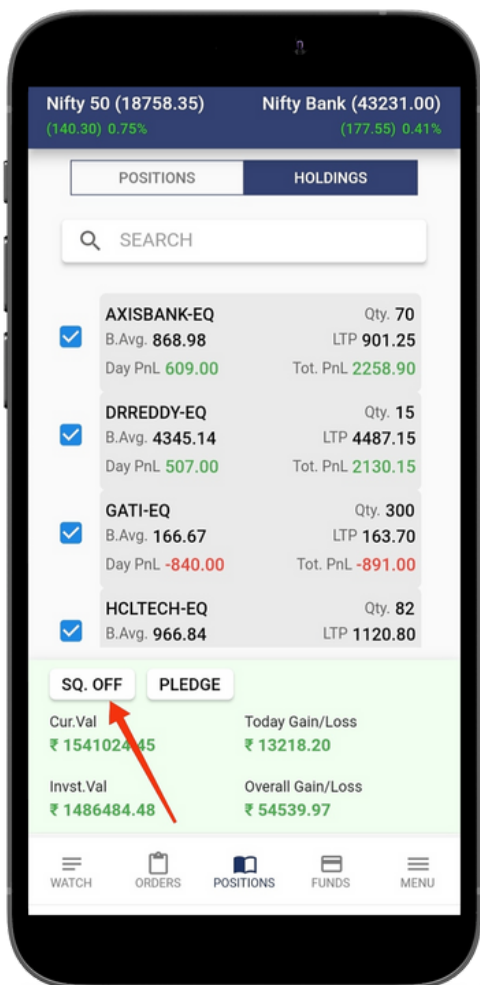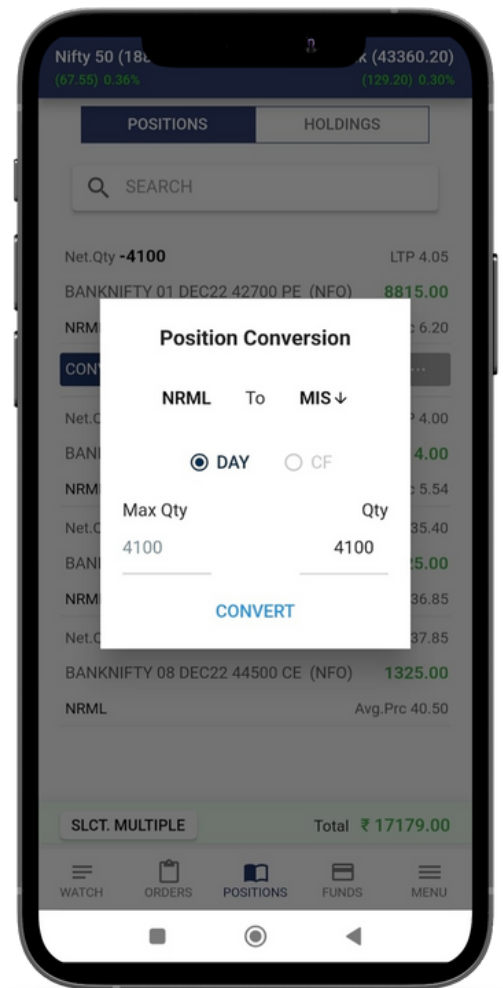
9.3 Multiple Exit

User can select multiple open positions by clicking on the checkbox and clicking on the Exit Tab to exit all selected open positions, a confirmation window will be displayed, and the user can select to exit all clicked open positions in one go or at one click.

9.4. Holdings Book

Holding Tab shows the user list of securities in the Demat account. Shares purchased will show under the holding tab from T+1 day (Trade day +1).
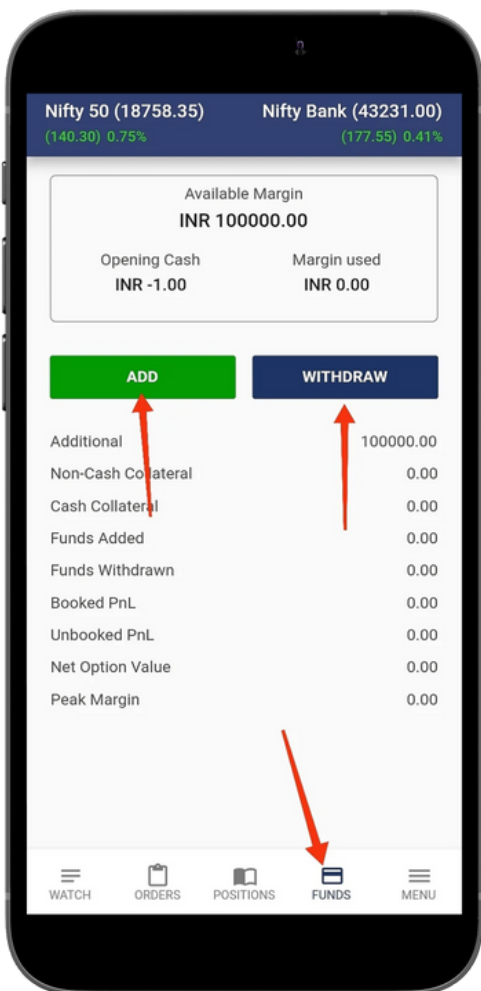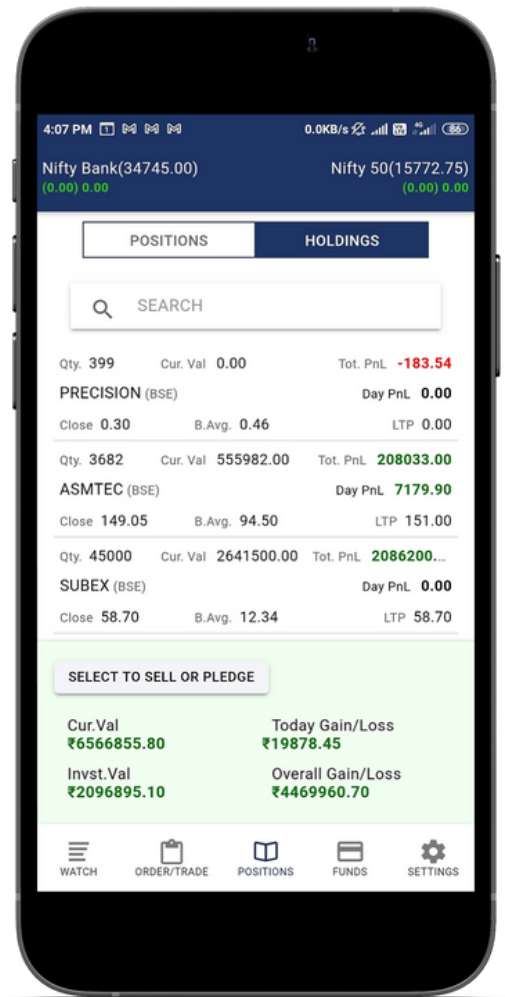
10. How can I Add or Withdraw Funds from Phillip9 ?

1. Click on Funds.
2. Click on Add if the user wants to deposit in the trading account, a new window will appear in which the user needs to enter the amount, select bank account and payment mode which will take the user forward to complete the journey.
3. Click on withdraw if the user wants to withdraw money from a trading account, a new window will appear in which the user needs to enter the amount and click on proceed.

Phillip9 Demo Video Link

11. How can I find my Ledger and P&L (Profit & Loss) Reports in Phillip9 ?

If you want to see your Ledger and P&L (Profit & Loss) reports then follow the below instructions

1. Go to Menu

2. Click on PhillipOne (Back office) where the user can view all the required reports & Ledger on the PhillipOne app. Please refer below video of PhillipOne and explore.

PhillipOne Video Link

Phillip9 Demo Video Link
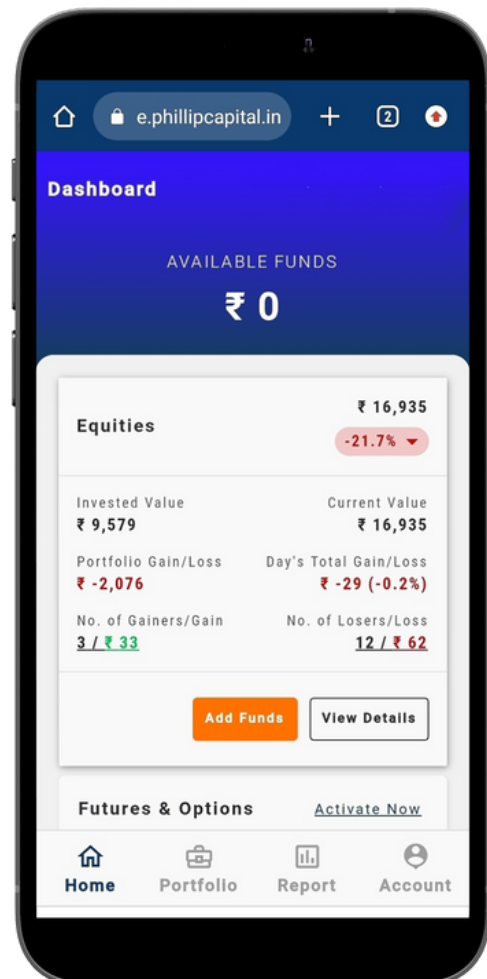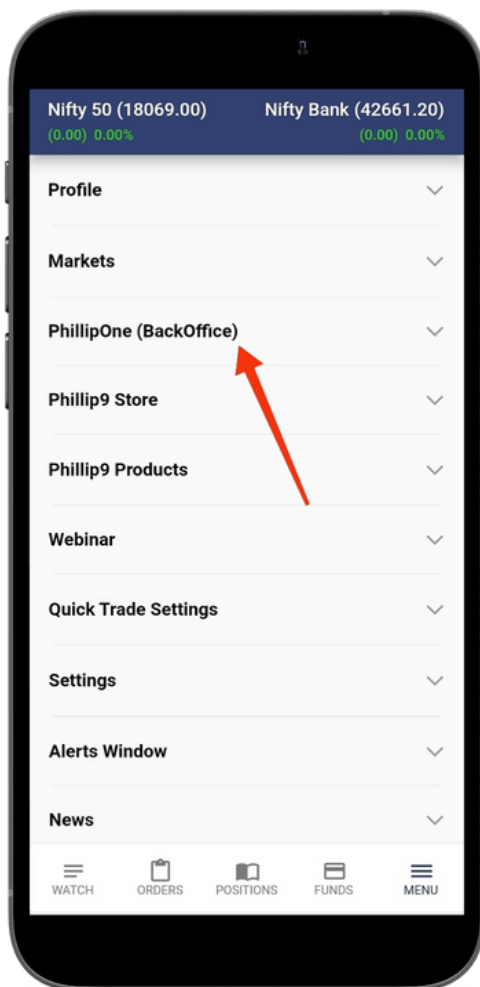
12. How to check Notifications in Phillip9 ?

1. Go to Menu
2. Click on Notifications, user can view the Admin messages, Trading calls, Research Calls, GTT order, and Scrip Alert.

Phillip9 Demo Video Link
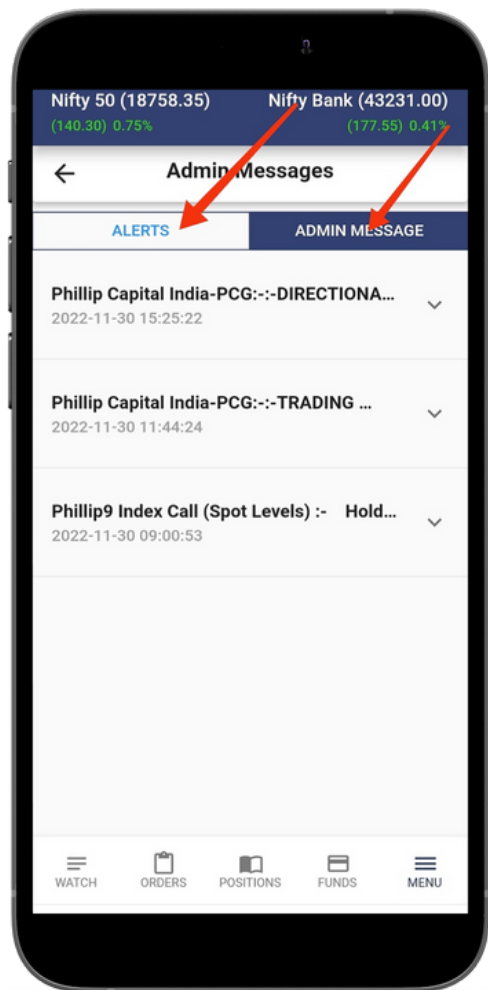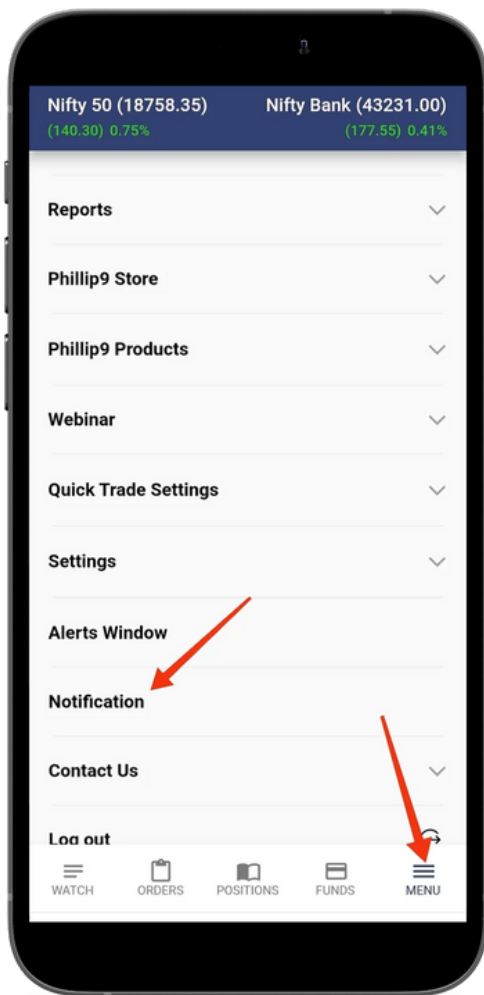
13. How can I change my Quick Trade Settings in Phillip9 ?

1. Go to "Settings"; then click on Quick Trade Settings
2. Order Confirmation: -Select order confirmation TAB, Phillip9 will reconfirm the order
3. User can View the exchanges like on the left-hand side, BSE, NSE, MCX, & OTHER SEGMENT. In the middle quantity column, the user can enter desired quantity and on the right-hand side Price column, select any one option between Limit Trade and Market Trade settings.
4. Update and save the current settings.

Phillip9 Demo Video Link
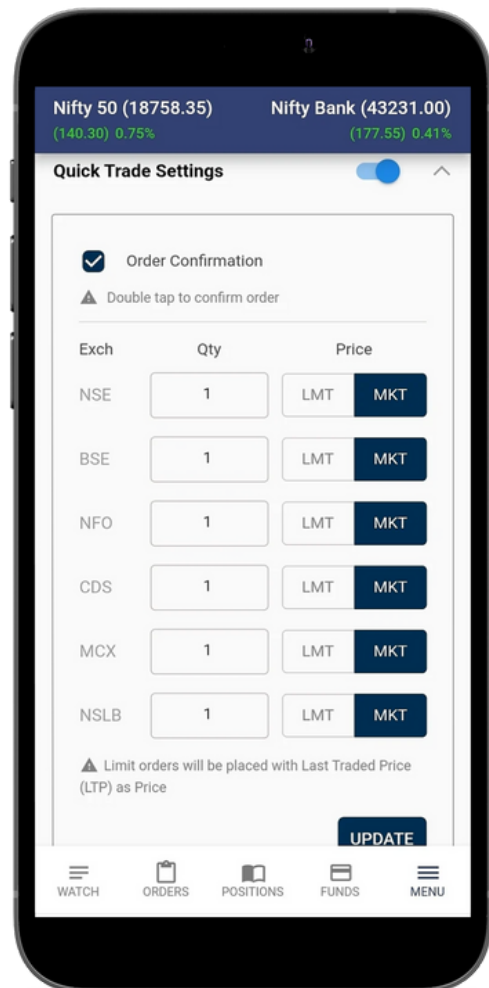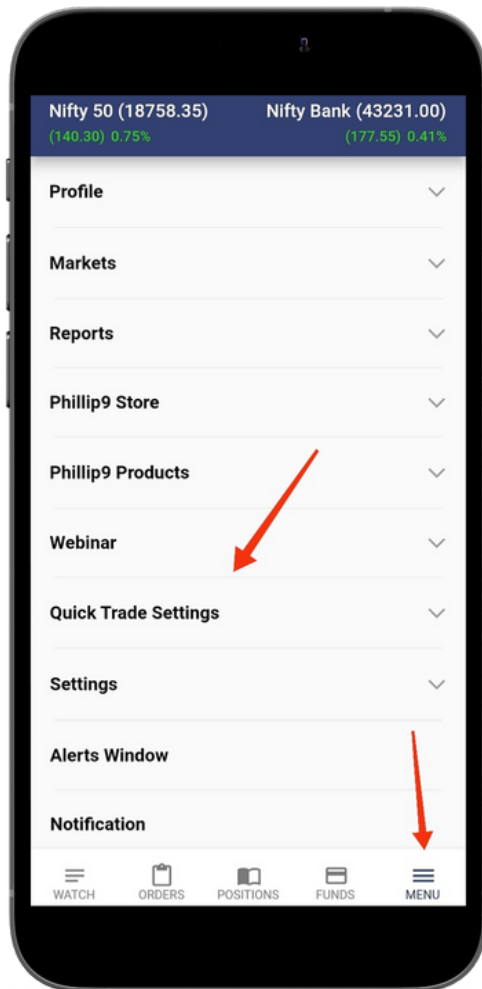
Phillip9

14. How to explore Settings features in Phillip9 ?

If the user wants to explore settings in Phillip9, go to "Menu", and click on Settings & user will be able to explore settings for the below options

Phillip9 Demo Video Link
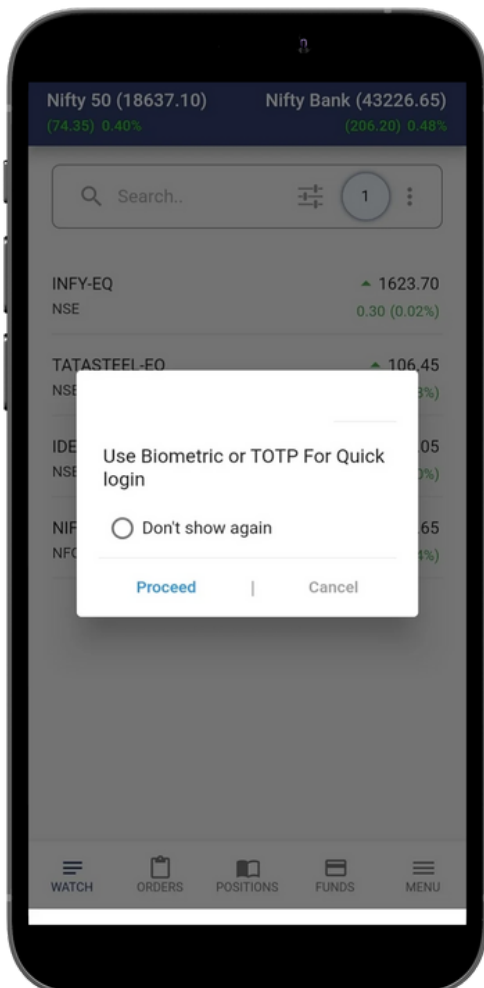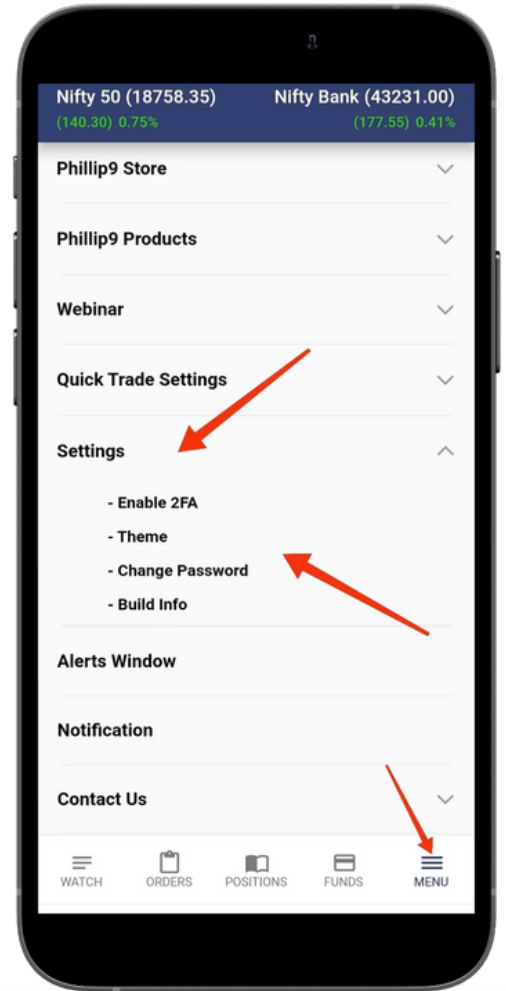
14.1. Enable 2FA

To Enable 2FA user can authenticate using TOTP or Biometric, please refer to FAQ point No.1 for more information & details.

14.2. Theme

User can select the theme Light and Dark. Choose your desired one.
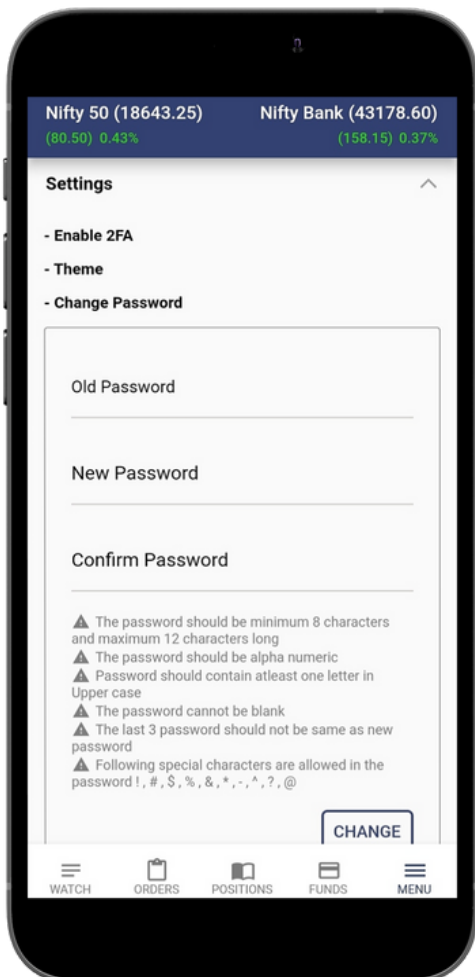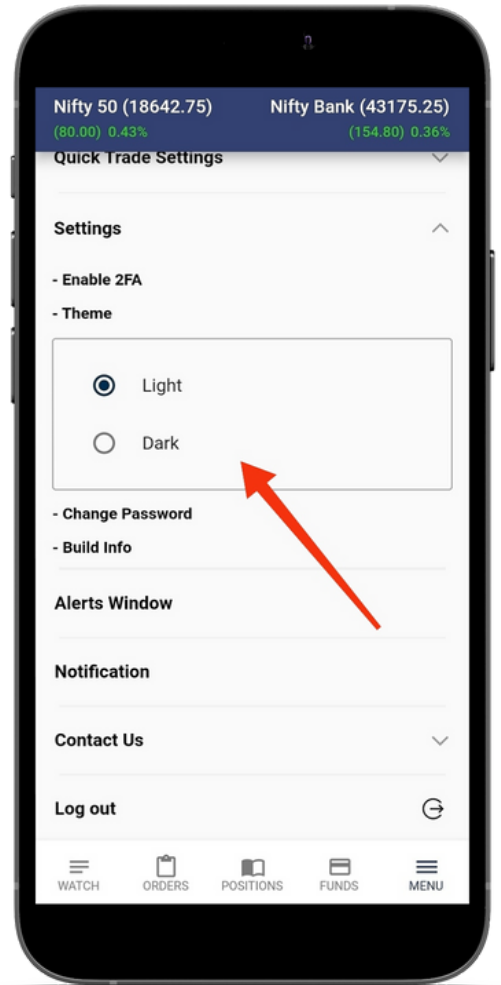
14.3. Change the Password

Enter the old password of Phillp9, enter your desired password in the new password section and to verify please enter again your new password in confirm password section, by doing this user will be able to change password.

Phillip9

14.4. Build Info

To check the latest version of the app
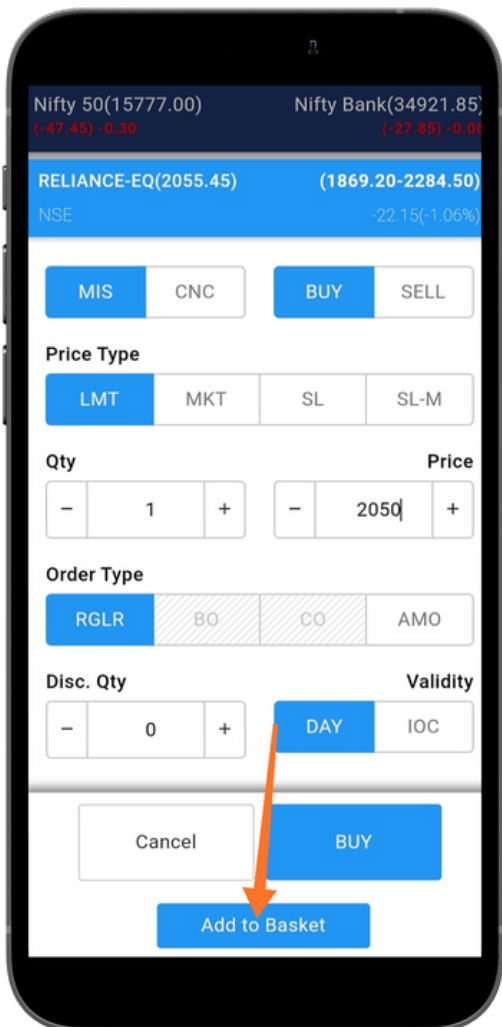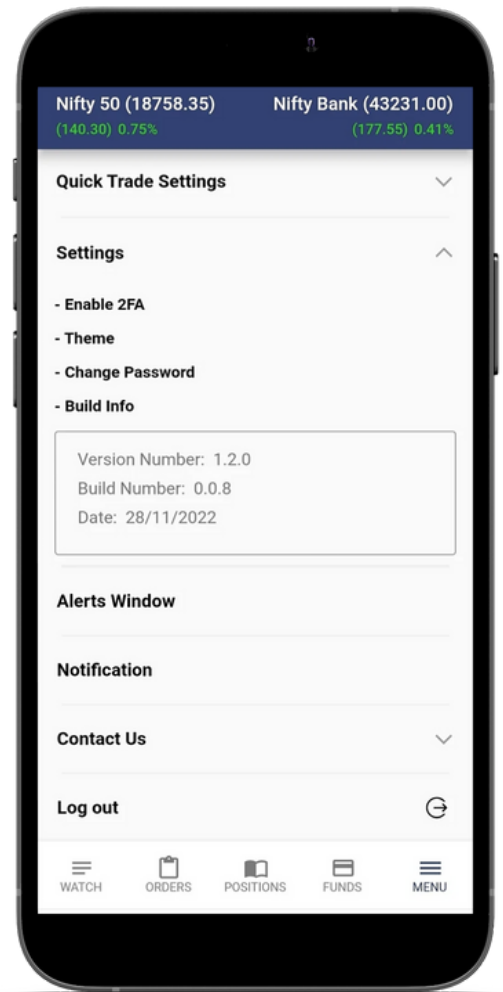
15. How to Use Basket Order?

Basket Orders are useful when user want to place & execute multiple orders at different prices, different contracts, different segments & different strategies at one click.

15.1 Select the Contract or instrument equity, futures, and options that the user wish to trade.

Phillip9 Demo Video Link

15.2. Enter the Script, Quantity, Price, and Market Type, and select the option to add to Basket, user can make as many Baskets with a maximum 20scrip or contract in each basket. All baskets will be saved in Phillip9 mobile app and can be used in the future. The user can also add or delete scrip/contract within the basket.
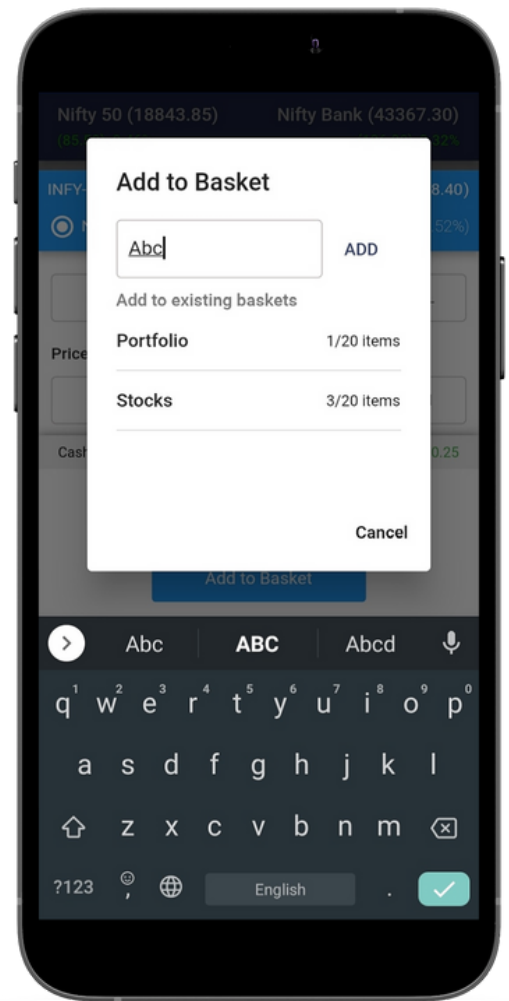
15.3. After adding orders in the Basket, the user has to select execute option to place the buy or sell basket orders.
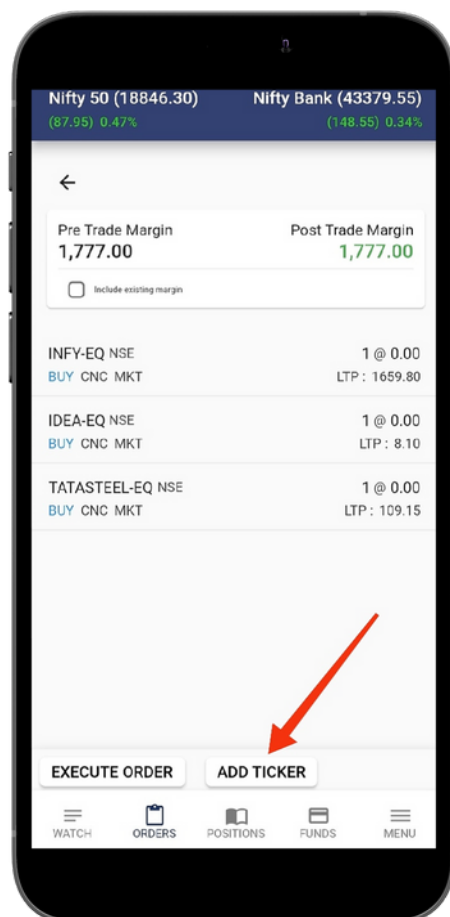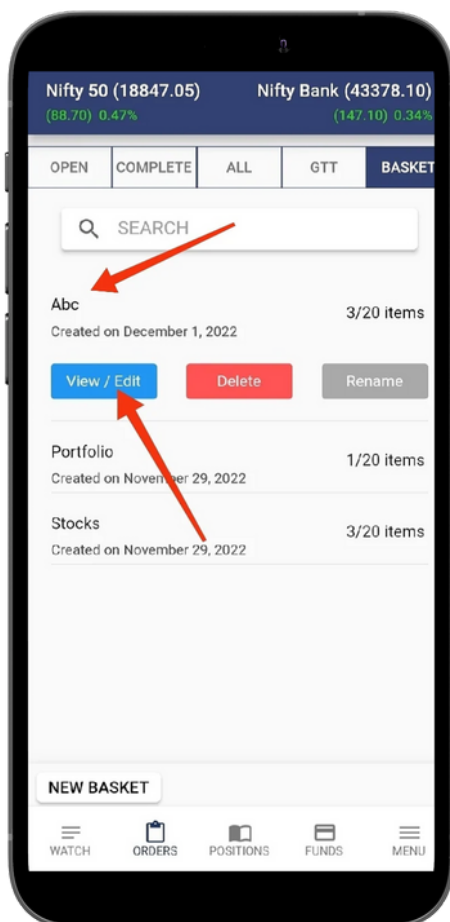
Phillip9

15.4. After Market Order (AMO Order)- Similar to Normal Basket Order, user can use the AMO Basket Orders
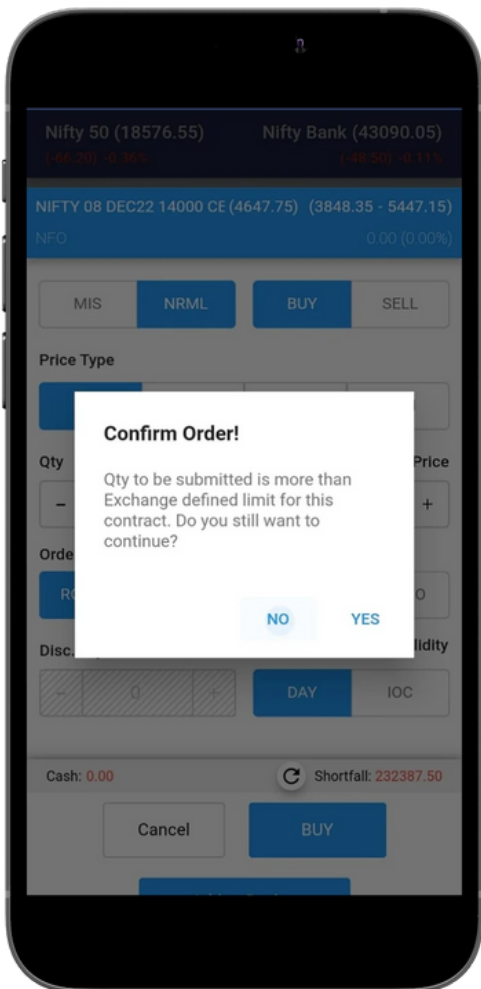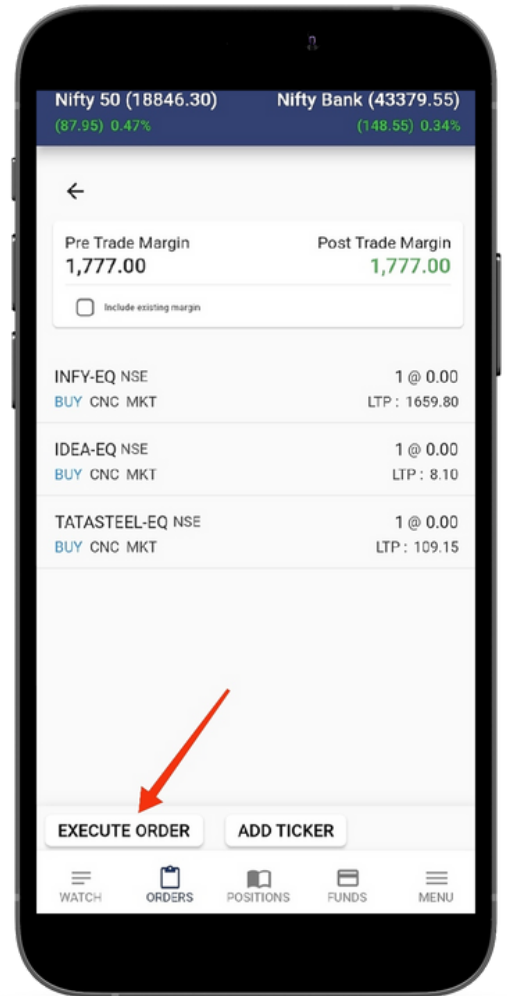
16. Phillip9 Features?

16.1 Slice Order

Order type that slice order of larger quantity or value into smaller orders, where each small order is sent to the exchange only after the previous order is filled. This helps to reduce the impact cost of execution in addition to not revealing large orders in the market depths.
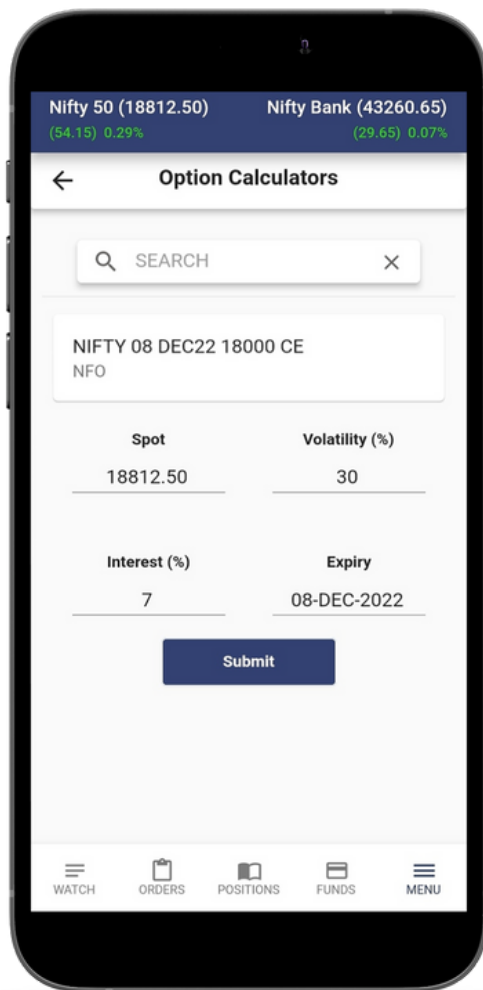
Phillip9 Demo Video Link

16.2 Markets
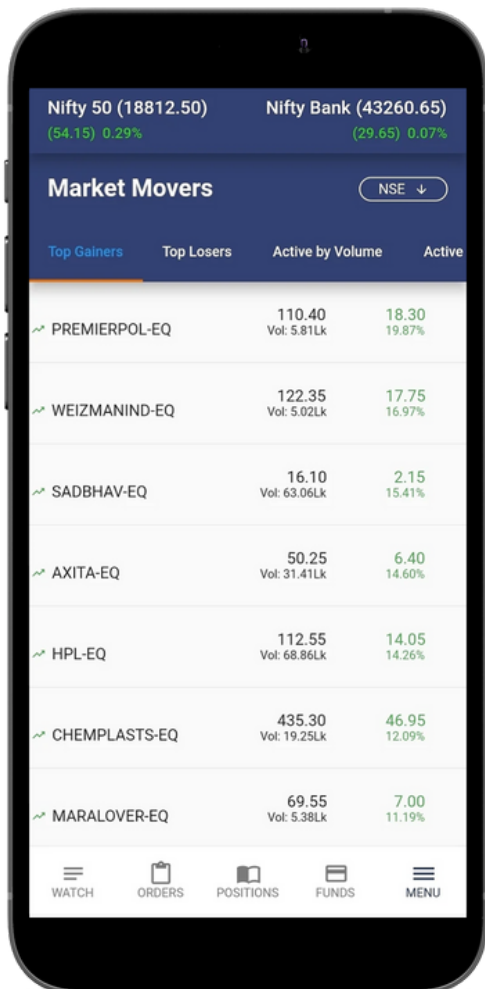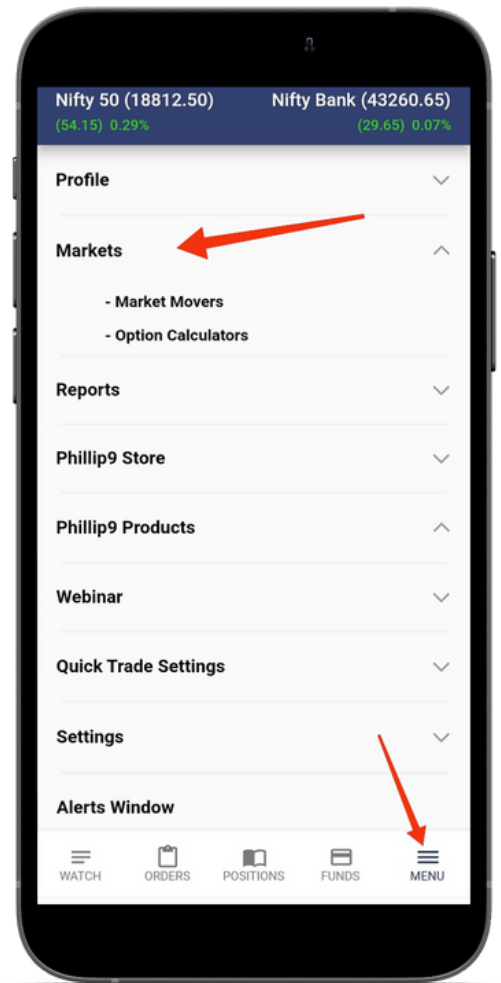
16.2.1 Market movers

User can view Top Gainers, Top Losers, Active by Volume, and Active by Value for BSE, NSE, MCX, & OTHER SEGMENT.

16.2.2 Option Calculator

Users can check Option Greek values by using the option calculator. The global search bar allows you to select an option contract of a particular underlying.
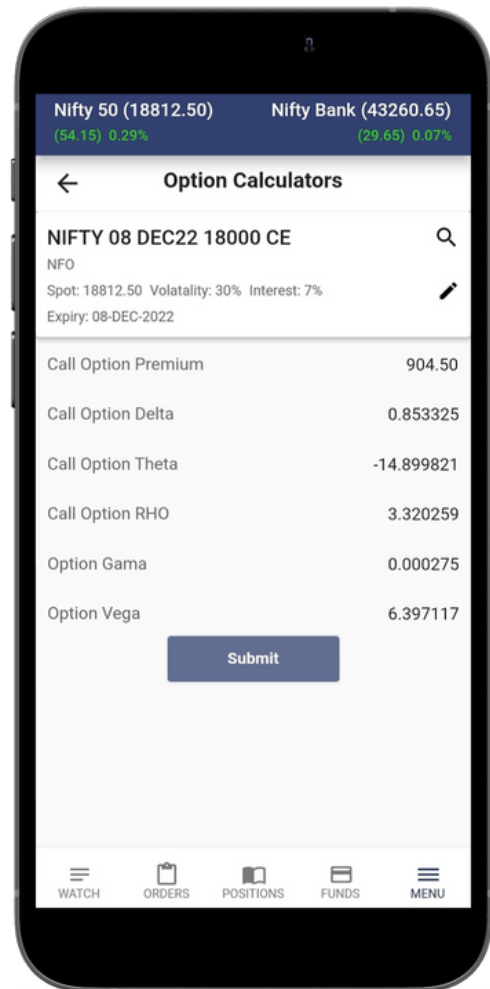
16.3 Phillip9 Store

The user can connect with our exclusive partners through Phillip9.
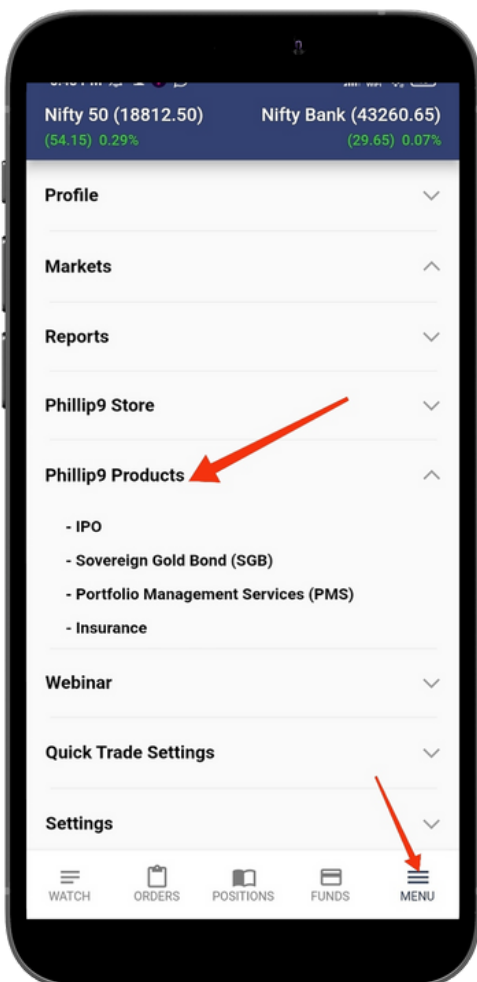
17. Phillip9 Products ?

17.1 How to apply for IPO using Phillip9?

Step 1: Login to the Phillip9 Mobile app and select IPO under Phillip9 Products under the " Menu" option.

Phillip**9**

Step 2:

Select the IPO from Ongoing IPO list.
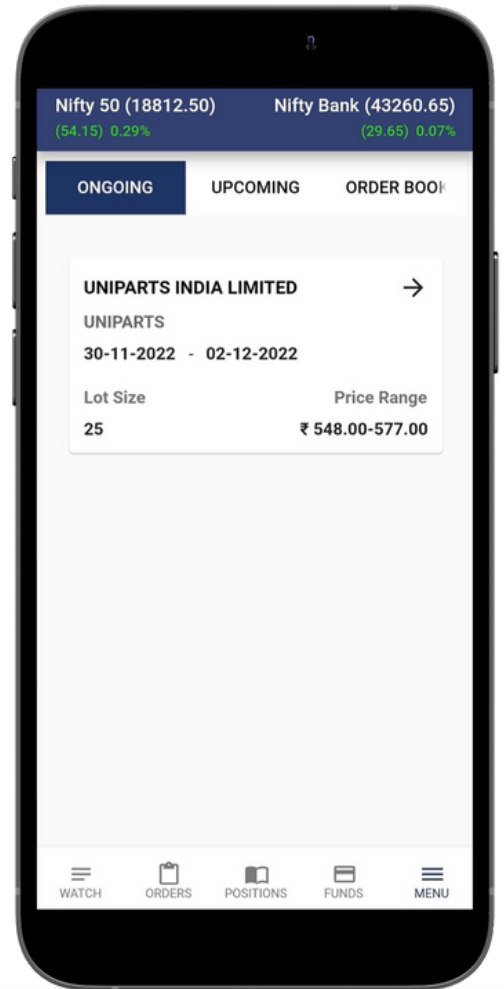
Step 3:

Click on Apply Now, Please Enter the price or you can click on the cut-off price and then enter your quantity, and your UPI Id, accept the terms & conditions by clicking on the checkbox and proceed by selecting Next button.
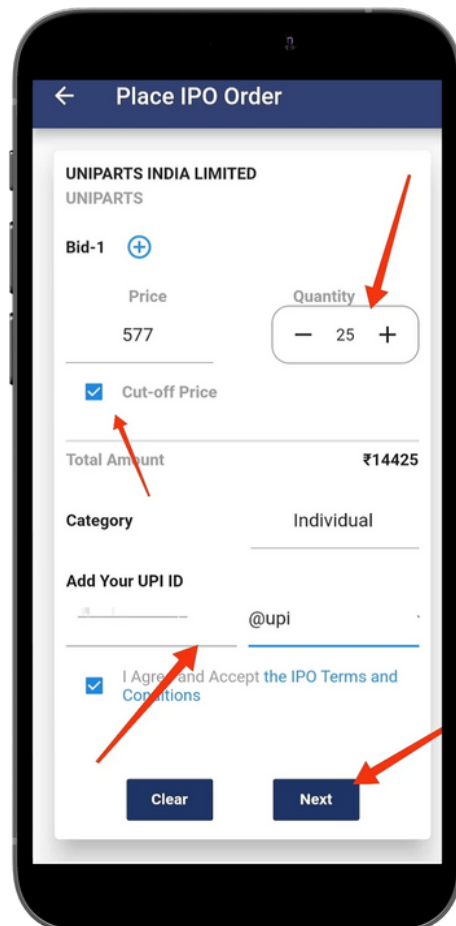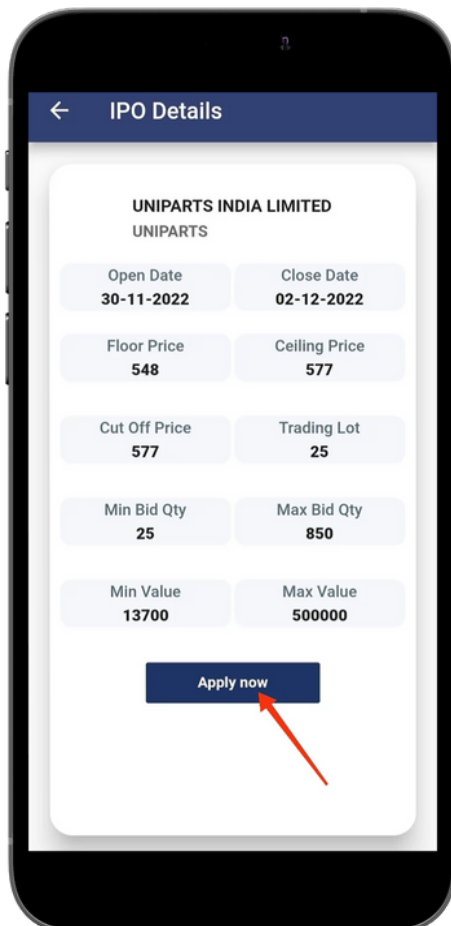
Step 4:

Verify all the details and click on Submit Application, your bid will be successful once you accept the mandate received from your UPI application.
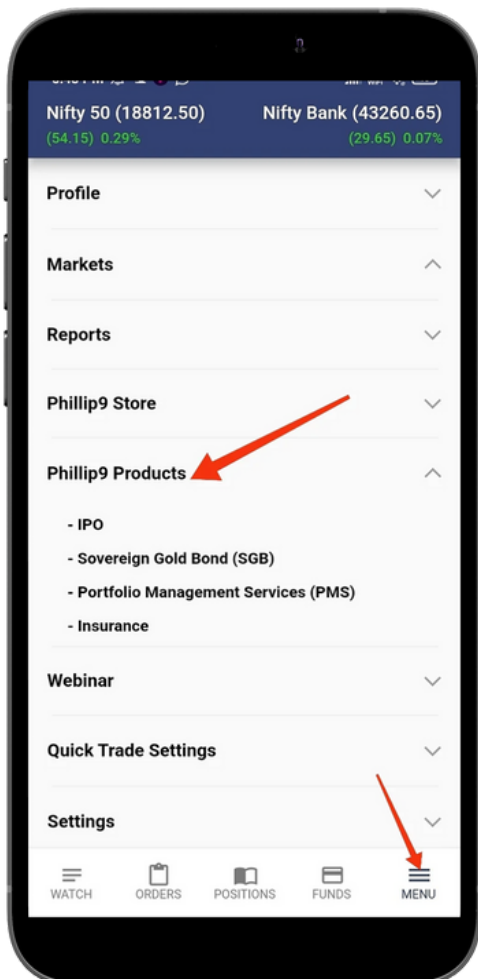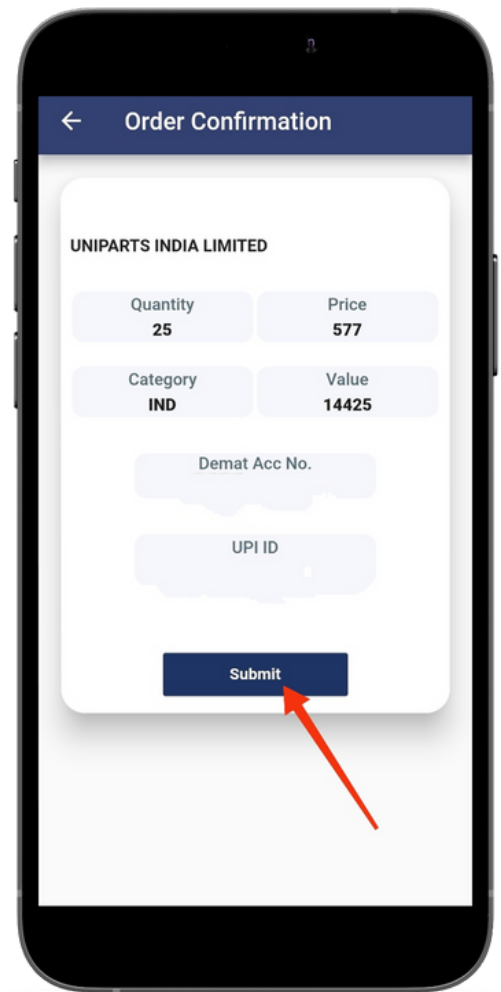
17.2 How to apply a Sovereign Bond (SGB)?

Step 1: Login to the Phillip9 Mobile app and select Sovereign Bond under Phillip9 Products under the " Menu" option.

Step 2: Select the Ongoing Sovereign Bond.

Step 3: Please enter all the required details & Apply. Users can also view the order book to check the order status.

17.3 Portfolio Management Services (PMS):

User can check details of PMS services offered by PhillipCapital and can also connect with the team.
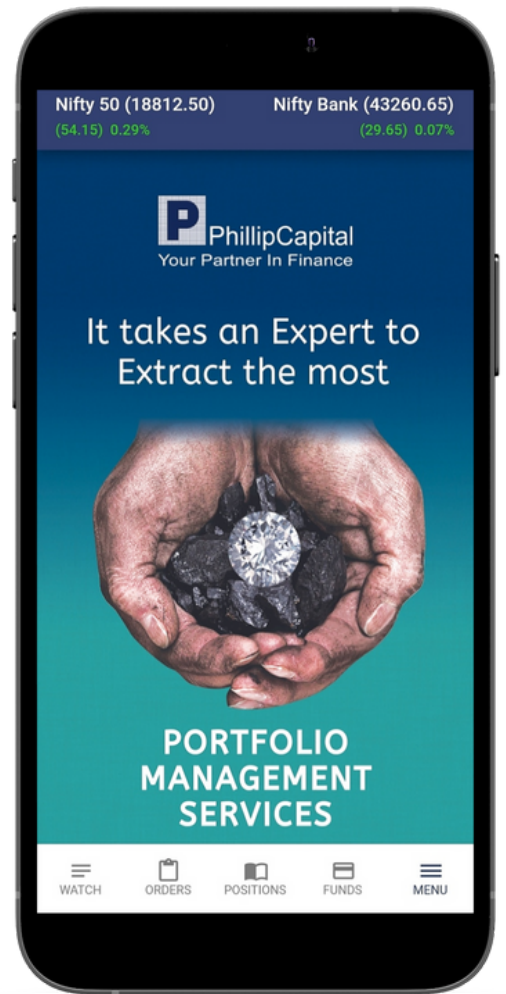
17.4 Insurance:

User can check details of Insurance services offered by PhillipCapital and can also connect with the team.

Phillip9