



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.

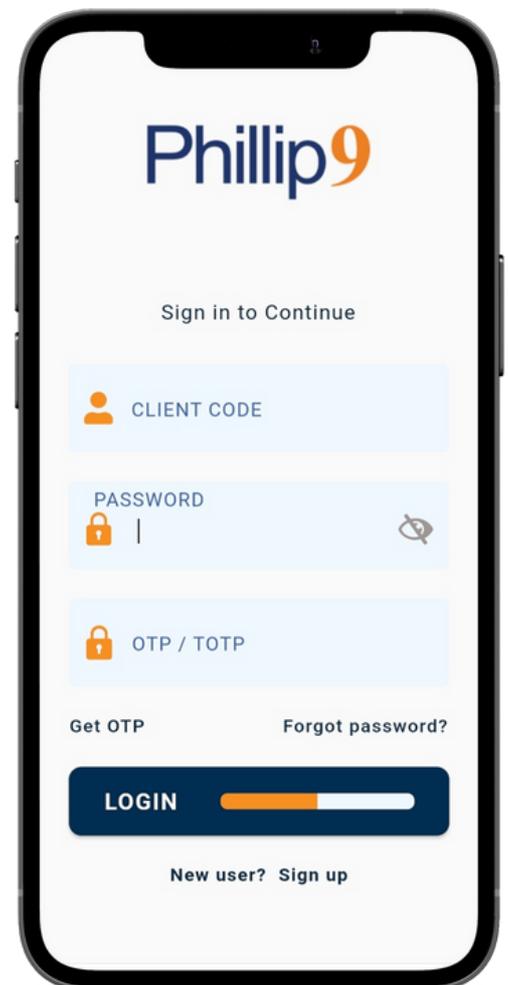
For example, some of the basic features which the investor would be able to do are highlighted below:

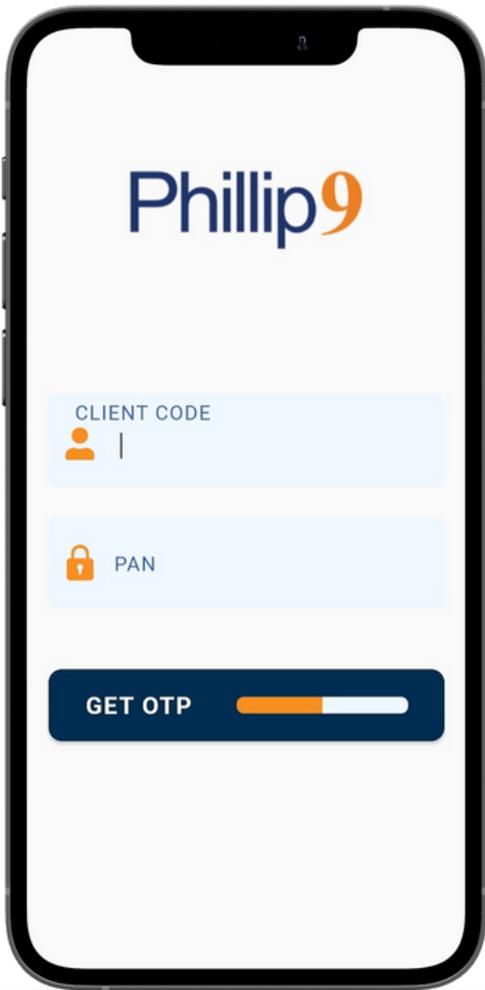
- Place Orders
- Modify, Cancel Orders
- View Order Book
- View Trade Book
- View Quotes
- View Intraday Charts

1. How can I login into Phillip9

Following are the steps to log into your **Phillip9** mobile application:

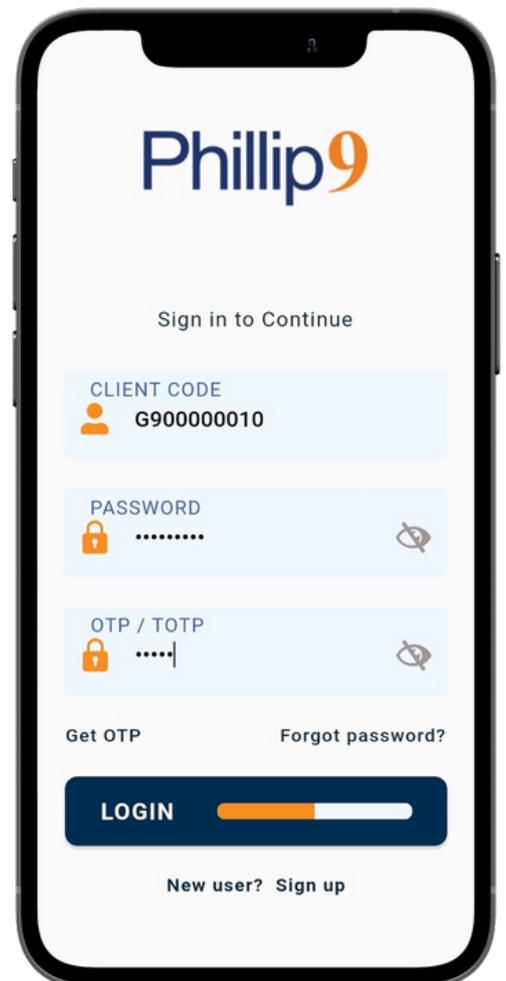
Step 1: For the first login with the new control, you need to generate OTP.

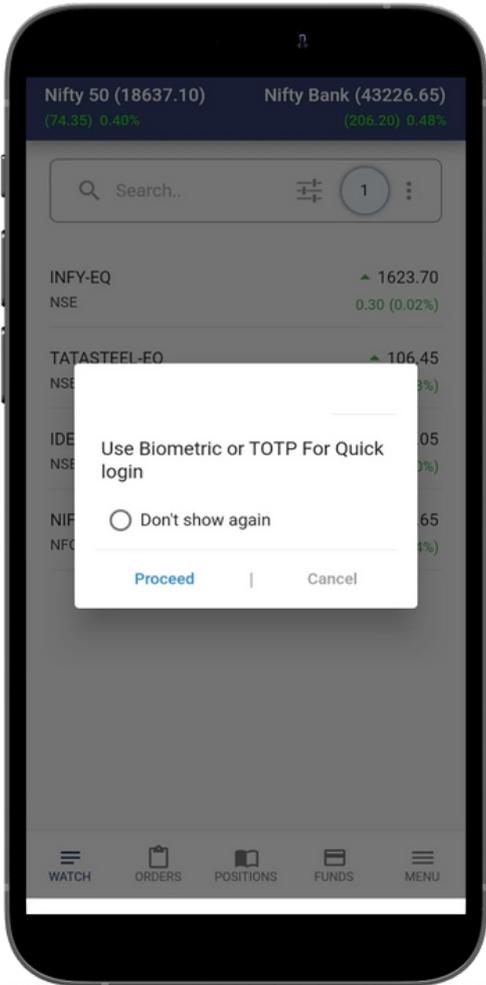




Click on the 'Get OTP' Option. Proceed to enter the Client Code and PAN number to receive the OTP on the registered email id and mobile number.

Step 2: Enter your Client Code, Password and the OTP received on your email id /Mobile to login into the trading application.

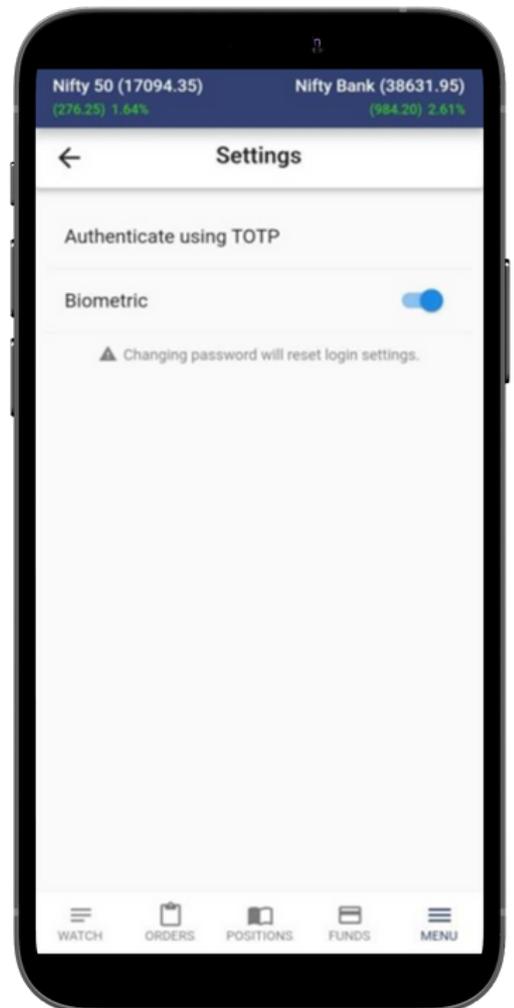


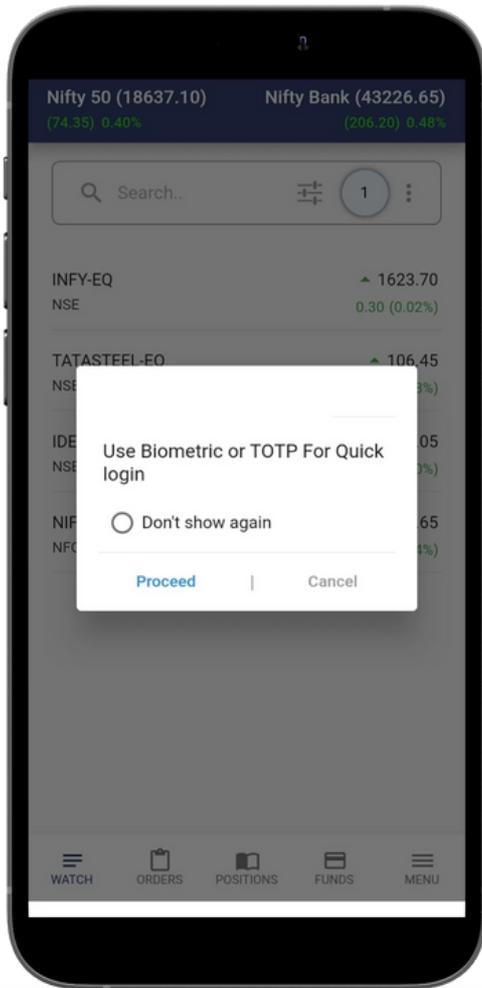


Step 3: Upon successful login in the mobile trading application, you can enable either Biometric or Time Based OTP (TOTP) to login instead of requesting an OTP every time before login.

Enabling Biometric Authentication:

After login, Biometric can be enabled from the Settings option under Menu Window.





Once Biometric is enabled, the Mobile application will first authenticate your Biometric (Fingerprint) and then you 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:

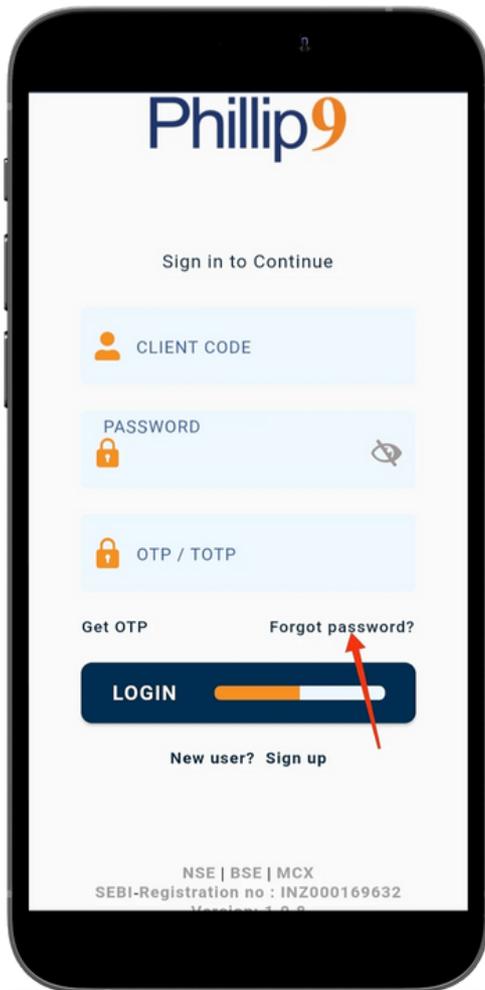
- Google Authenticator ([Android Download link/](#) [IOS Download link](#))
- Microsoft Authenticator ([Android Download link/](#) [IOS Download link](#))

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



Click on 'Authenticate using TOTP' and then 'Add to Authenticator' to open Google Authenticator to register OR 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.

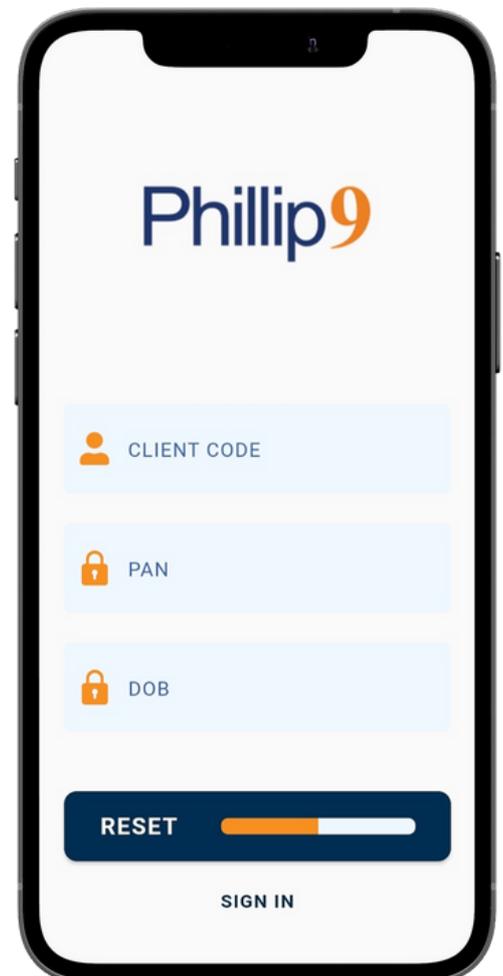


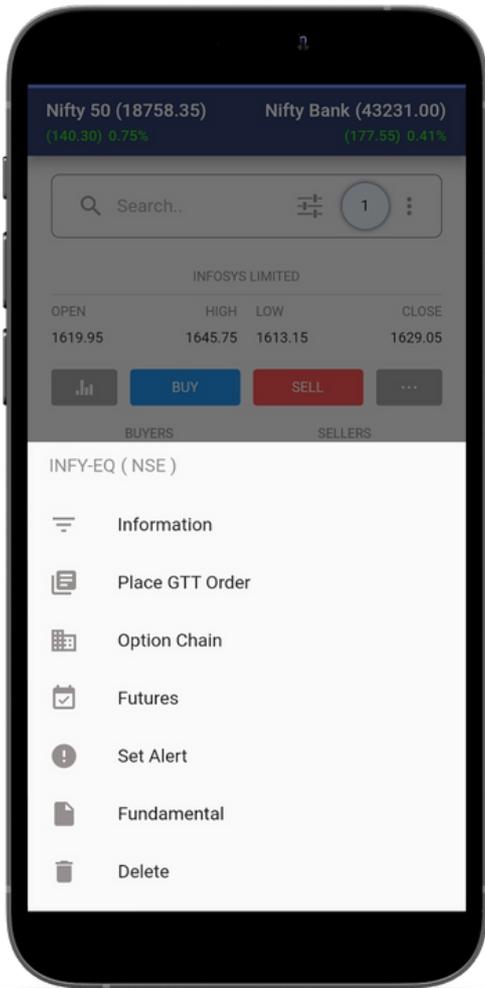
2. How can I reset and change my Phillip9 password?

In case you forget your login password, you can use the 'Forgot Password' link.

Steps to change the password.

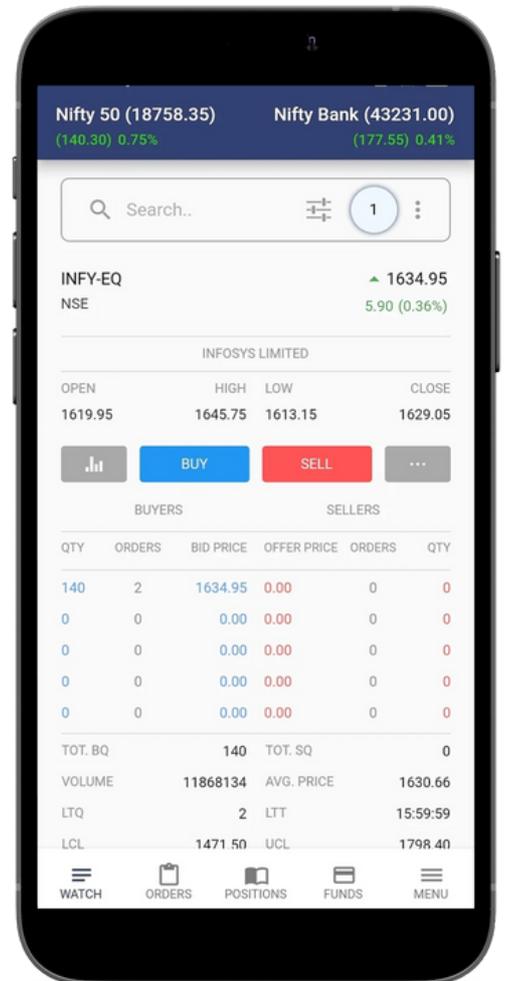
1. Click on Forgot password
2. Enter your Client Code, PAN & DOB in DDMMYYYY format and click on Reset
3. A new password will be sent to your registered email id & mobile number by SMS.
4. Enter the new password received & click on GET OTP, enter your PAN & click on GET OTP, please enter the OTP & click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

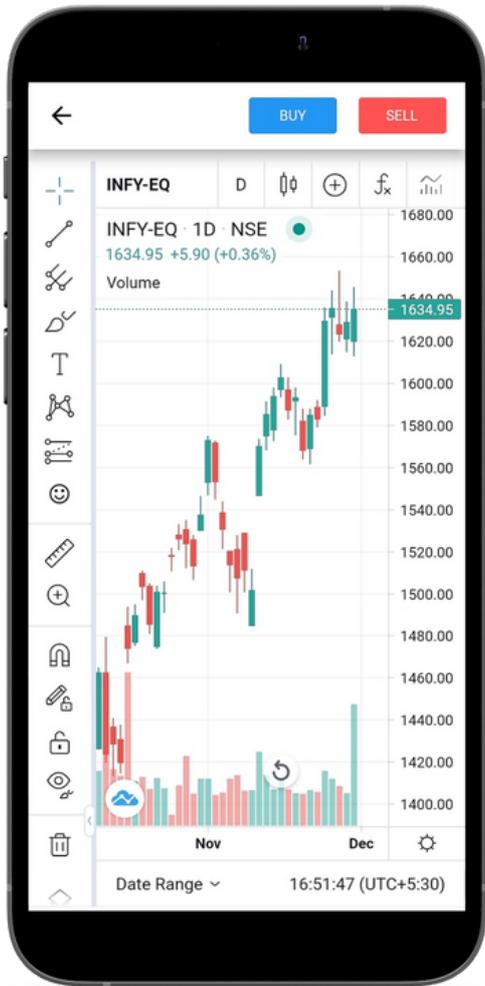




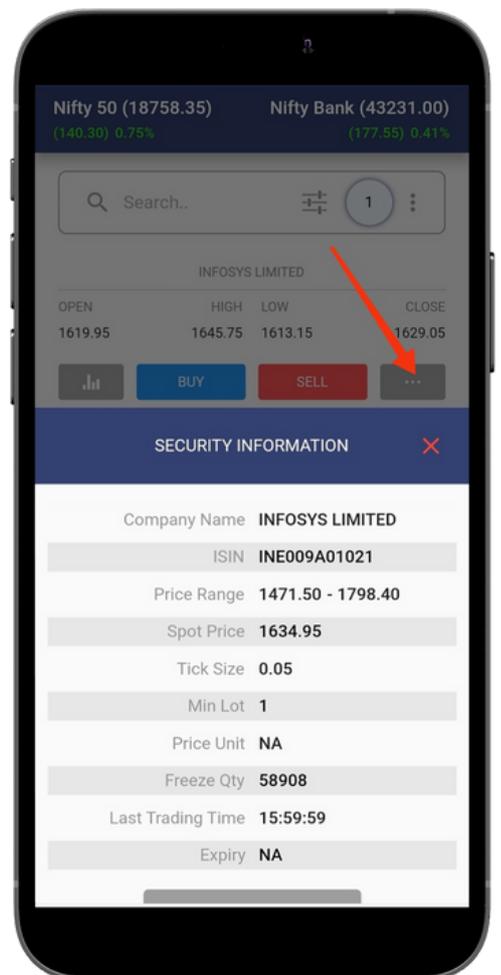
3. How can I explore market watch in Phillip9 ?

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.

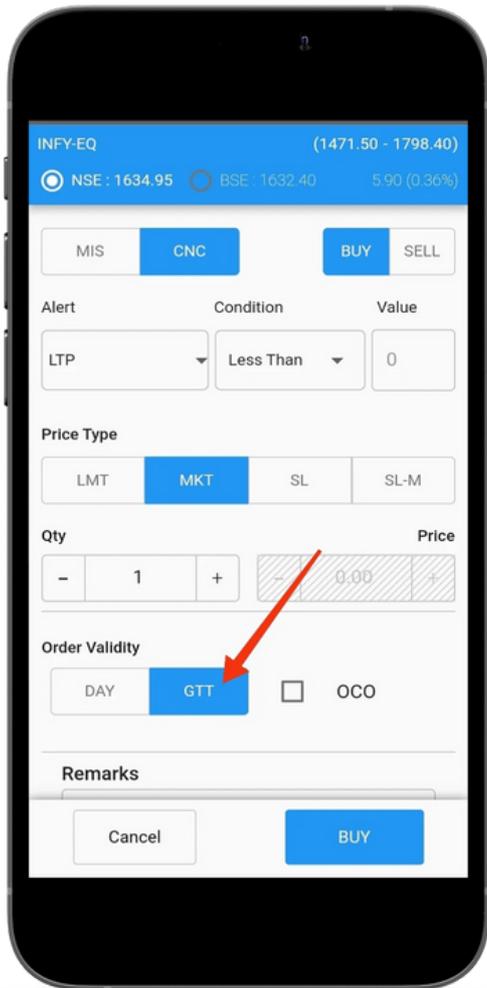




3.2) Charts: Under the Chart section, the user can click on the chart to view an intraday /1 day /1 week /1-month chart of that particular Scrip.

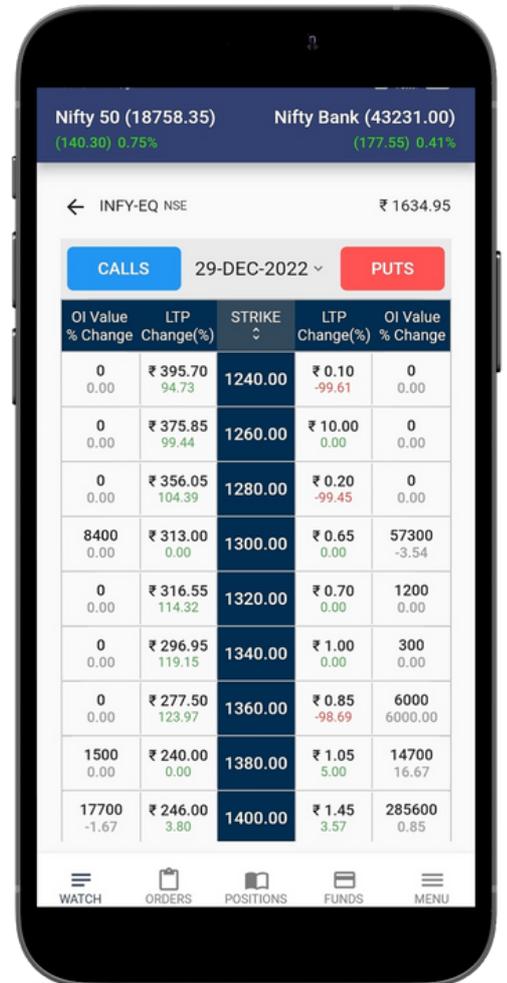


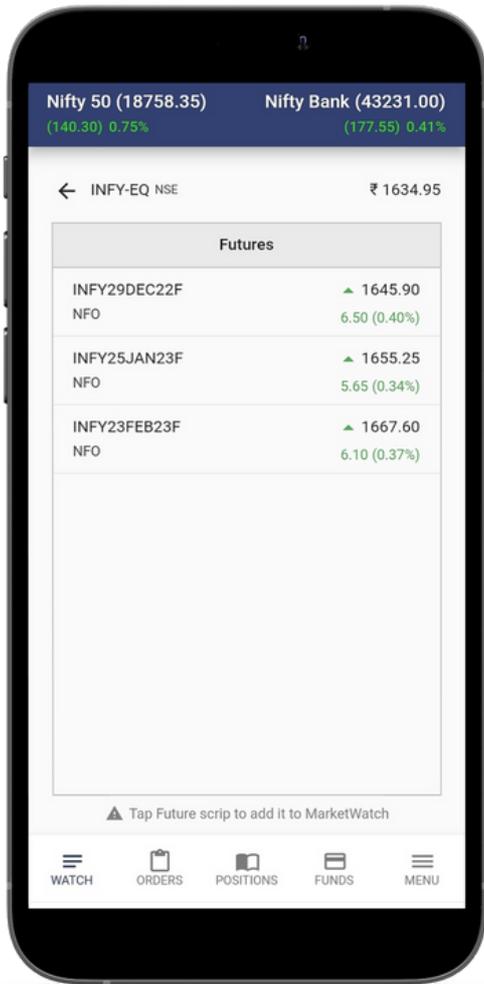
3.3) Security Information: This tab will give details information on the scrip like Name, ISIN, Price Range, Tick Size, Freeze quantity, etc.



3.4) GTT order: User can place a GTT order (Good Till Triggered) with their desired combination & condition.

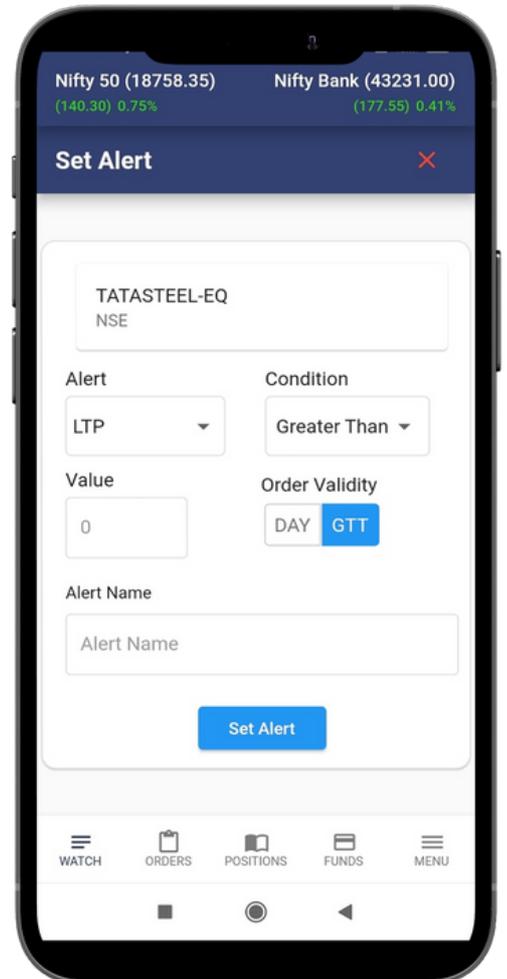
3.5) Option Chain: User can place Buy /Sell order in the option chain of that particular script.

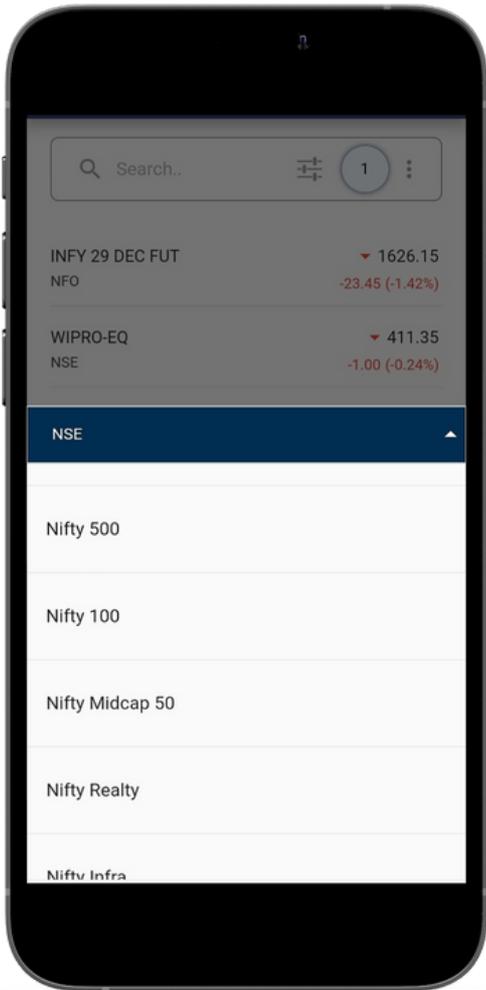




3.6) Futures: User can view three months future series of that particular scrip, Tap future scrip to add it to market watch.

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 “.





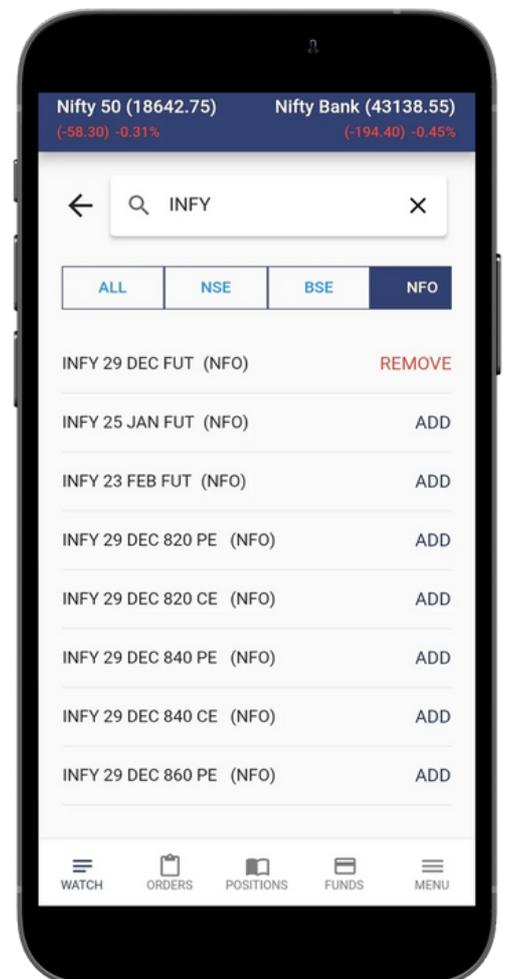
4. How to add Indices and Add & Remove Scrip?

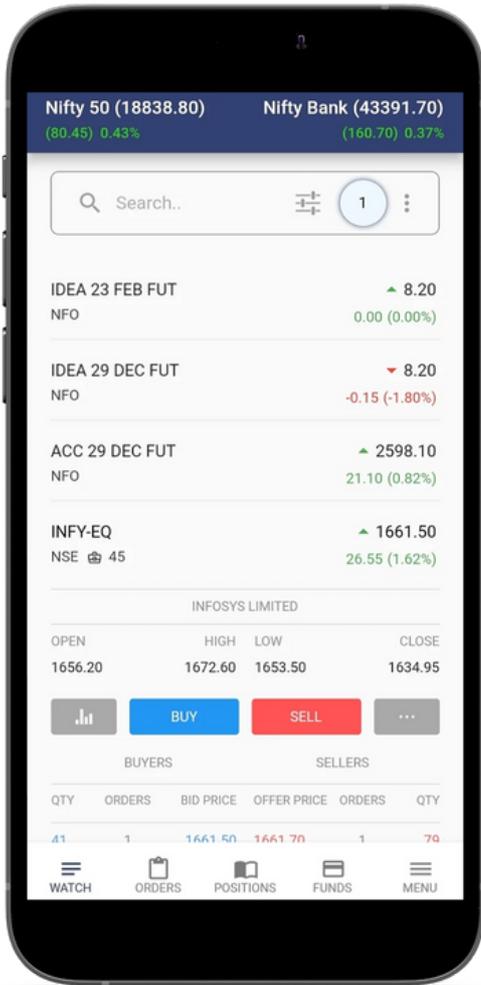
4.1 Add Index

Two Indexes can be added on top. Clicking on any index will open a list of indices, and you can select any particular index which you want to configure and will be replaced with the existing index.

4.2 Adding/ Removing Scrips in Market Watch

Adding Scrip is easy. You can simply search the name of the company or symbol and the system will give suggestions. This is a global search bar that allows you to select every contract, be it equity, futures or options of a particular underlying. The "Add" button helps in adding the scrip in the Market watch. The "Remove" button helps in removing the scrip. You also have an option of the 'Delete' button once the scrip is added in Market watch for removing from Market watch.





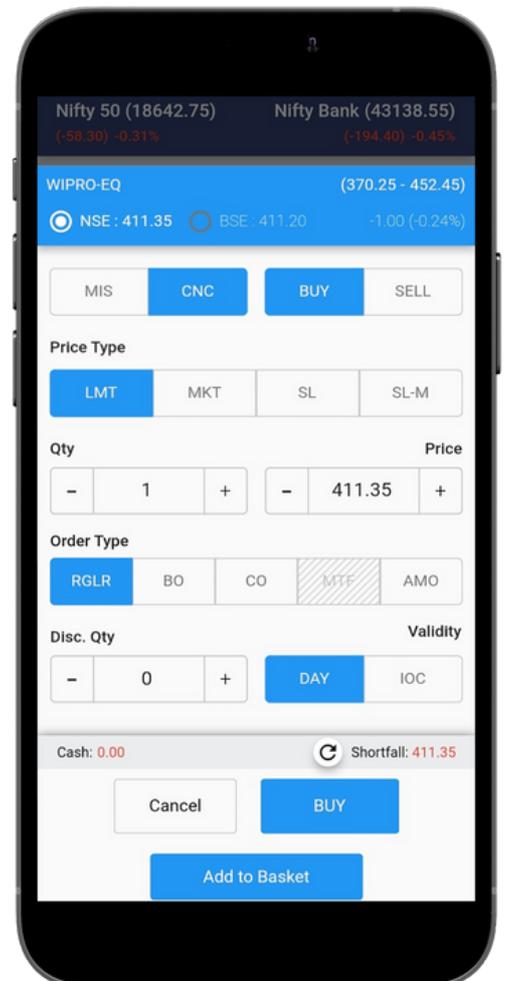
5. How can I place an order using Phillip9 ?

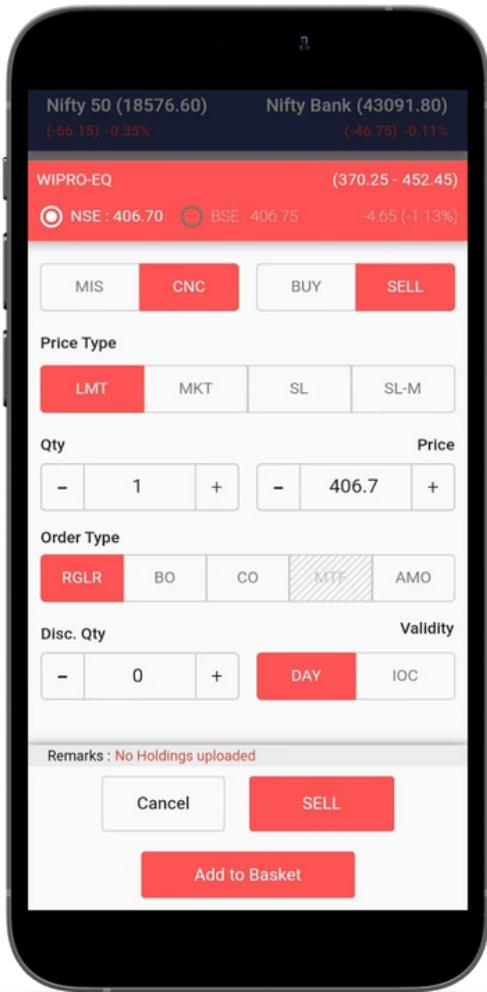
5.1 Order Placement

Order placement can be done from Buy/ Sell option available in the market watch after clicking on any particular scrip.

5.2 Buy Order

A Buy Order Entry is the request to place a buy order. Once you click on this option, the window will appear in which you need to fill in the different required parameters for placing the order.



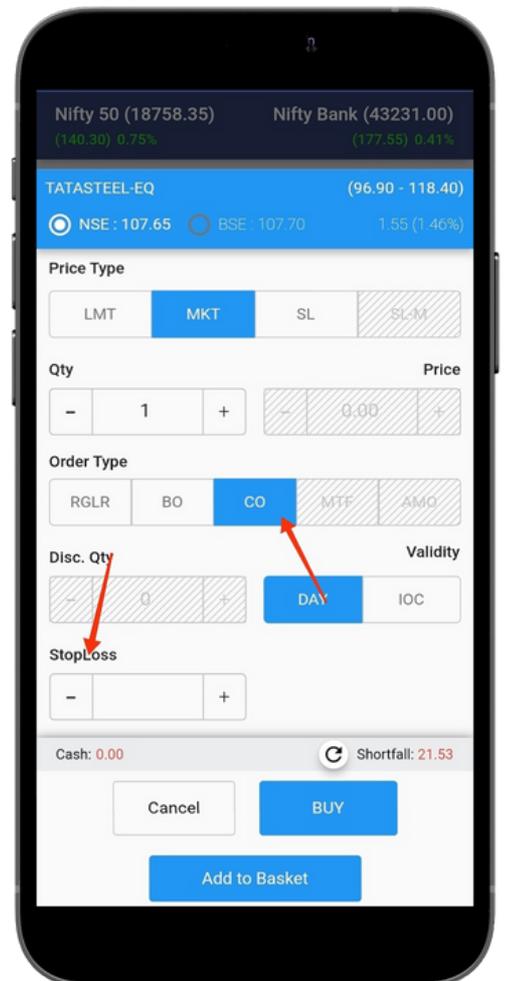


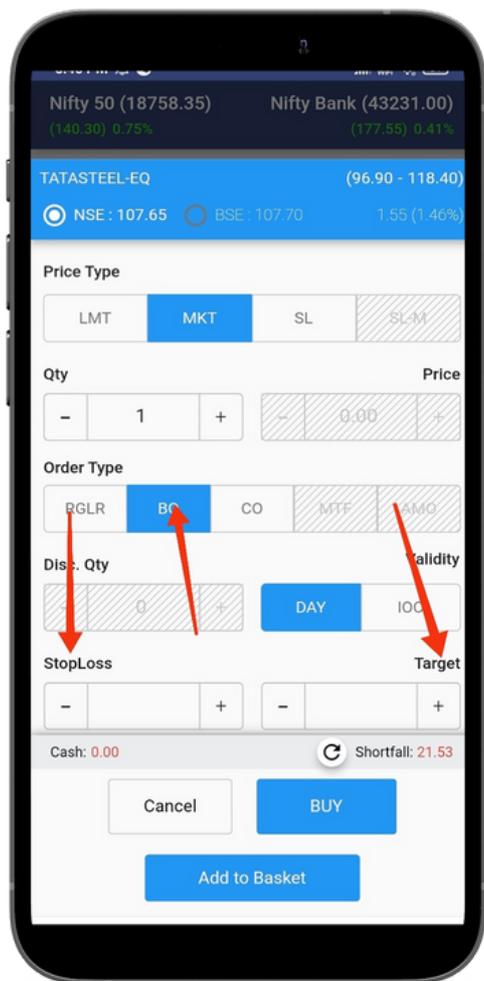
5.3 Sell order

A Sell Order Entry is a request for placing a sell order. Once you click on this option, the window will appear in which you need to fill in the different required parameters for placing the 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, trailing stop loss can be enabled for Cover Order.





5.5 Bracket Order

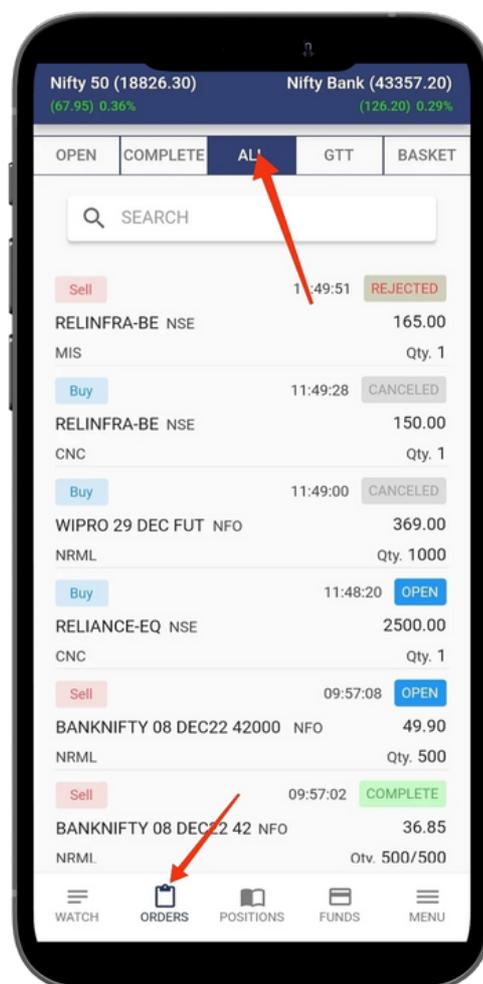
A bracket Order is a type of order where users can enter an order along with an exit price and stop loss price.

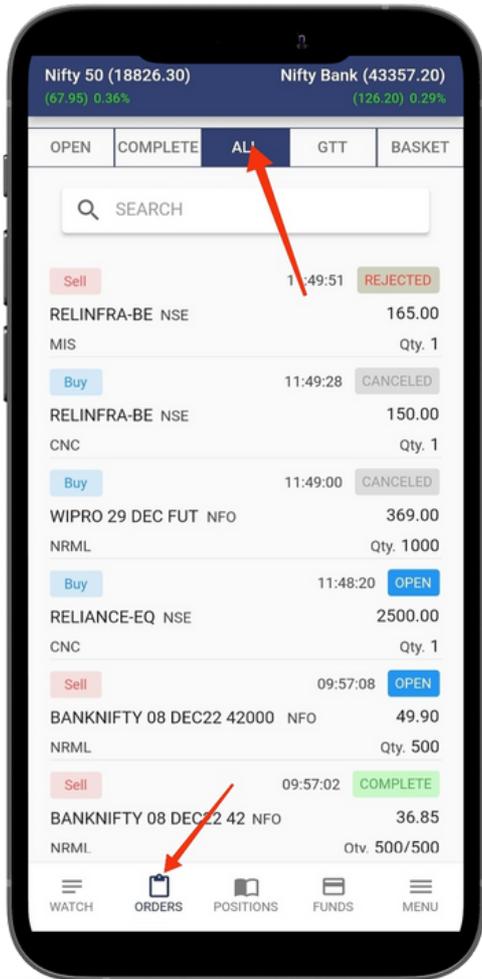
A buy order is bracketed by a high-side sell limit order and a low-side sell stop loss order. A sell order is bracketed by a high-side buy stop loss order and a low-side buy limit order, trailing stop-loss can be enabled for Bracket Order.

6. How to manage Order?

6.1 Change Pending Order Book

Order Book will give information regarding the timing of the order, script name, quantity, price, the status of the order. An open window will only display orders which are pending. A complete window will only display orders which are executed successfully. All windows will display all pending orders, cancelled orders, complete orders & rejected orders.



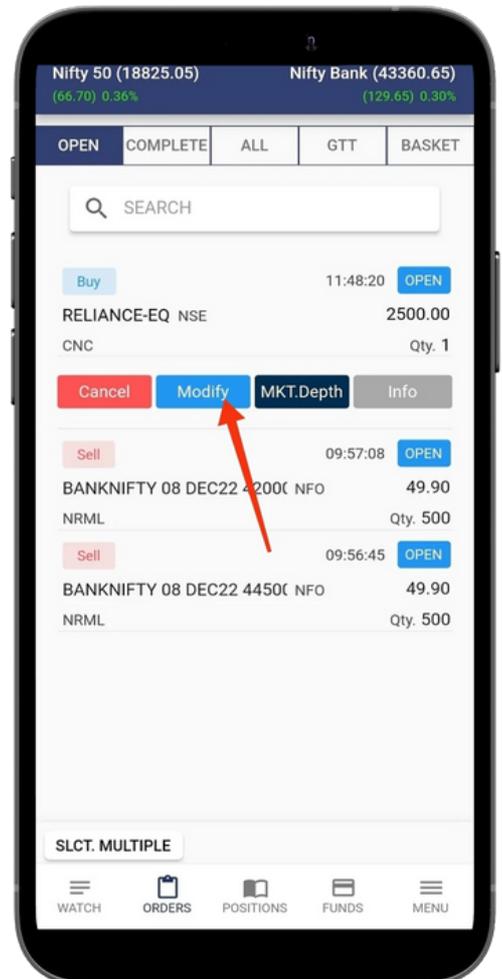


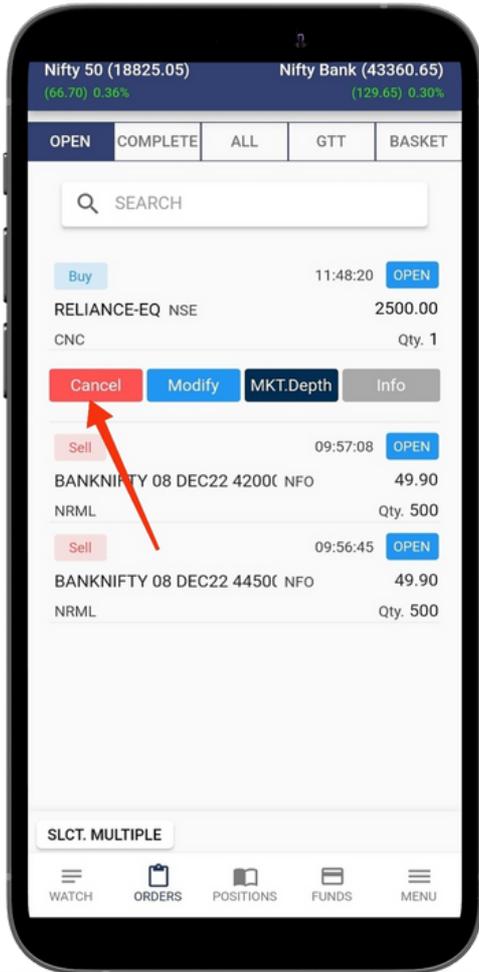
6.2 Options in Order book

You get four options in the pending order book like Modification, Cancellation, Information, and Cancel All. Here you also get a search bar on top for searching any particular order from the list of orders.

6.3 Order Modification

If you wish to modify your pending order, it can be done by clicking the modification option available from the pending order book.



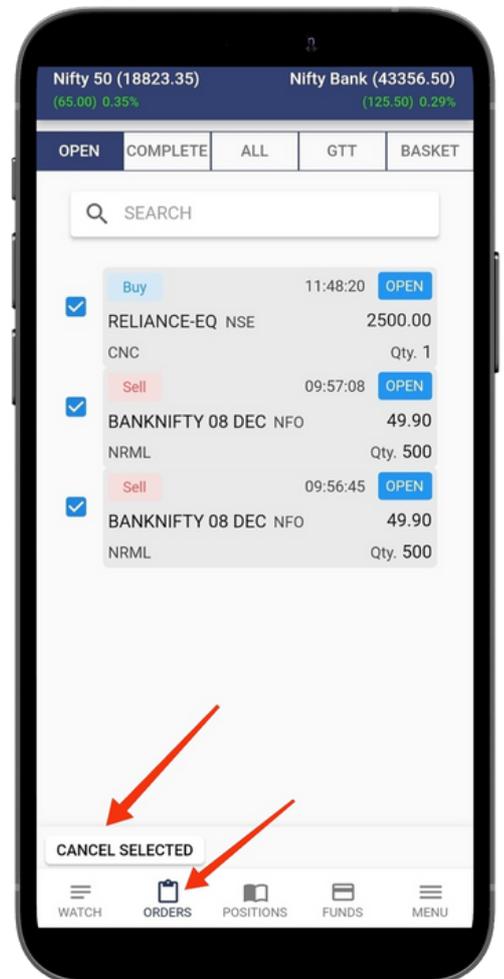


6.4 Cancel Order

Order can be cancelled by clicking on the "Cancel" option.

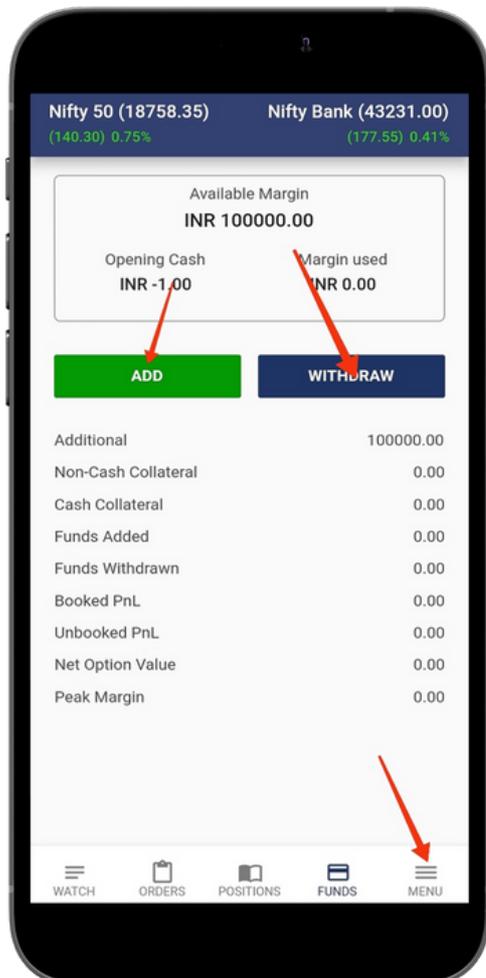
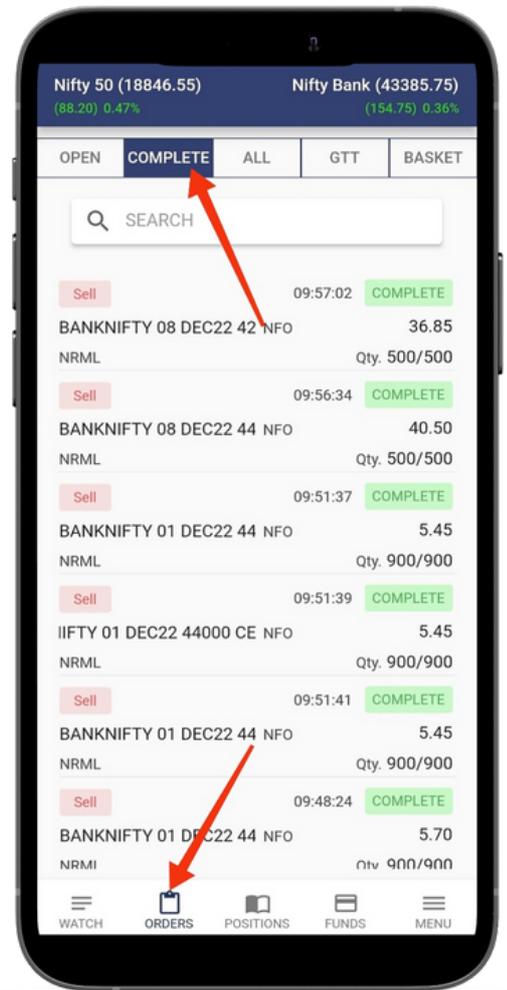
6.5 Cancel All

You can cancel all orders or a few selected orders by clicking the checkbox and can easily cancel multiple orders at one go.



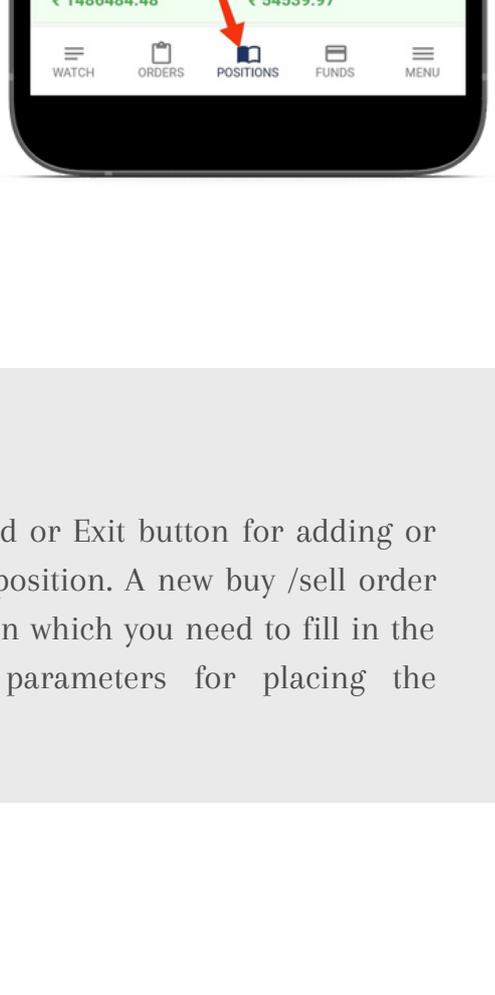
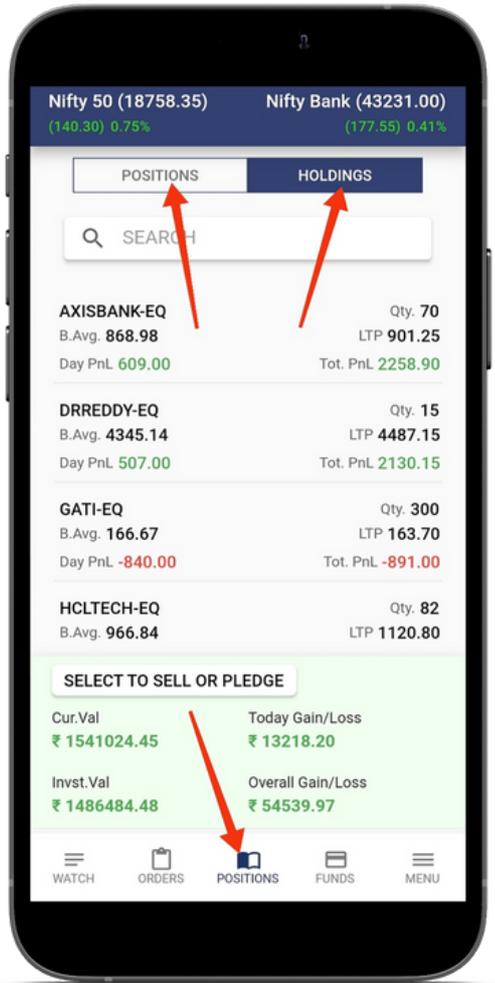
7. How to check the Trade book?

In the trade Book, you will be able to see those trades which are executed successfully in the market. An open window will only display trades that are pending. A complete window will only display trades that are executed successfully. All windows will display cancelled orders, complete orders & rejected orders.



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

1. Click on Funds
2. Check your Available Margin
3. Check your opening cash
4. Check your Margin used
5. Check Peak Margin



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

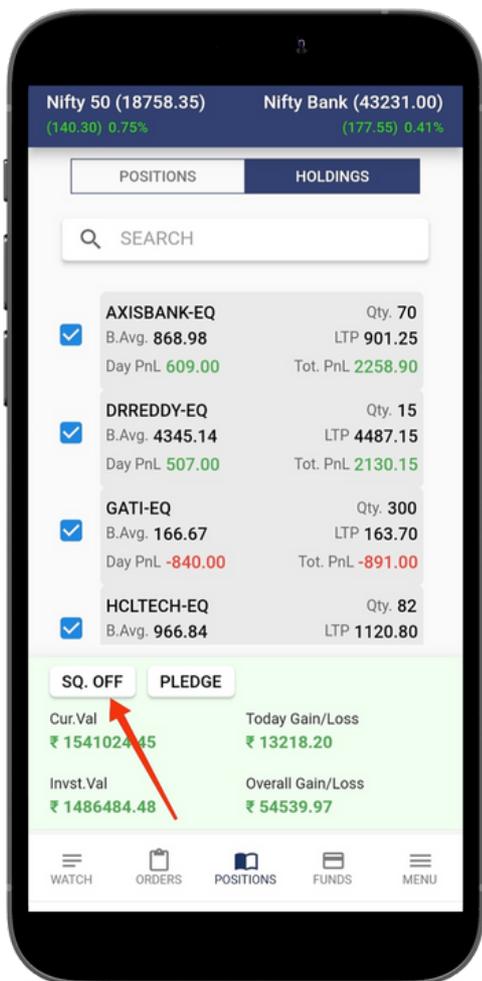
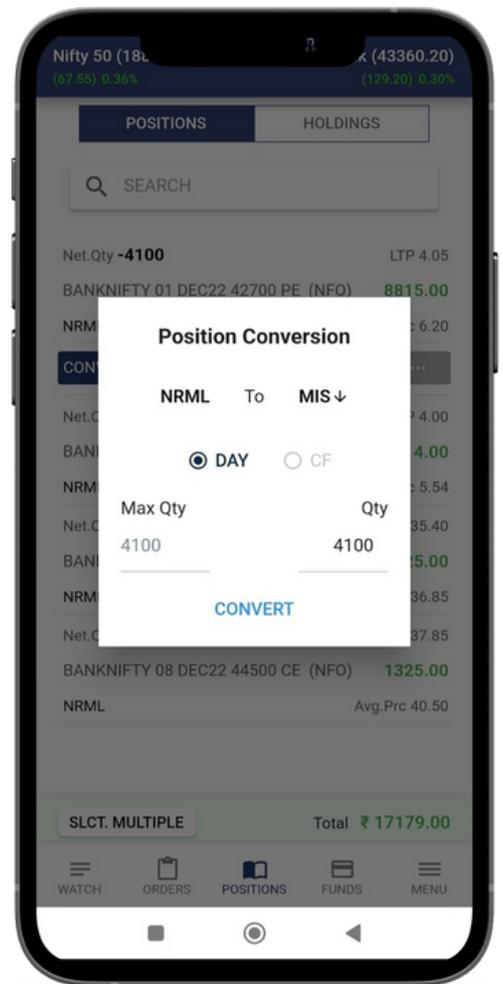
1. Click on Position Tab
2. You can view your current position in Cash & Derivatives Segment
3. Click on Holdings & you can view all your Holdings

9.1 Add and Exit

You can click on Add or Exit button for adding or exiting the existing position. A new buy /sell order window will appear in which you need to fill in the different required parameters for placing the order.

9.2 Position Conversion

This option lets you convert the position from Intraday Margin Intraday Square off (MIS) to Cash & Carry (CNC) and vice versa.

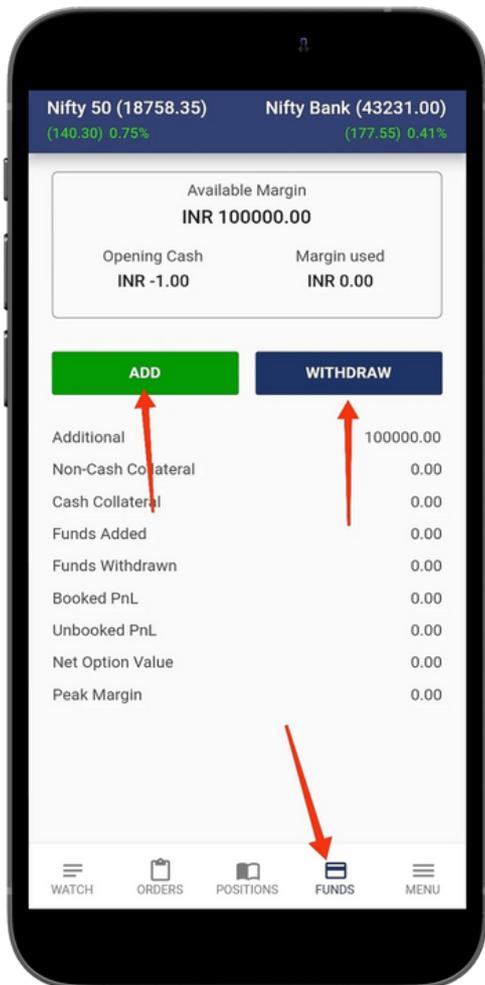
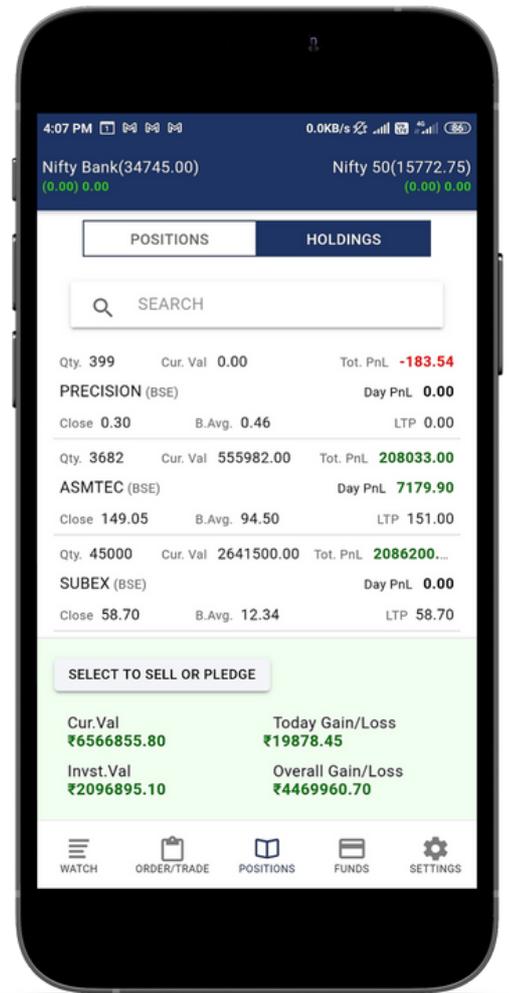


9.3 Multiple Exit

You can select multiple open positions by ticking on the checkbox and clicking on the Exit button to exit all positions. One confirmation window will come and confirm that you can exit all/ selected positions together.

9.4. Holdings Book

Holding window provides you with the stock details which are there in your Demat account.



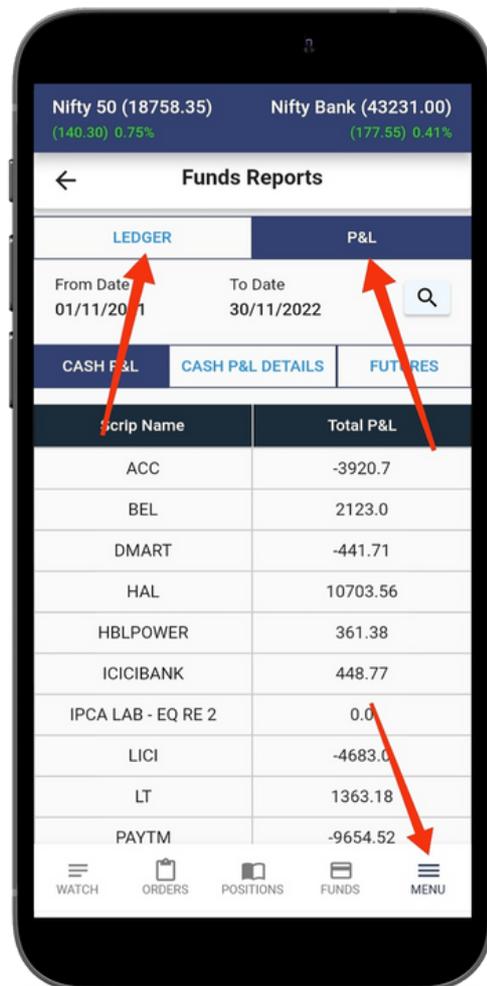
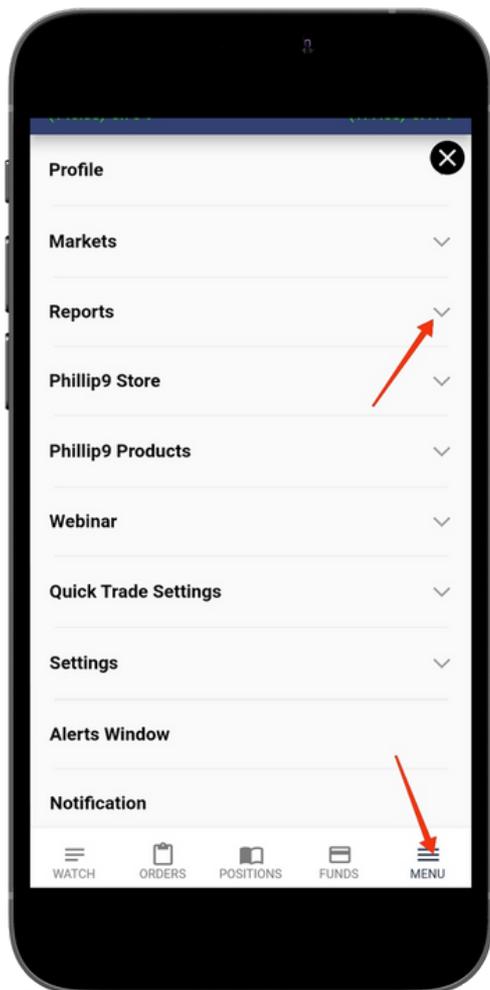
10. How can I Add or Withdraw Funds from Phillip9 ?

1. Go to Funds
2. Click on Add if you want to Deposit money or click on Withdraw if you want to withdraw money.

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

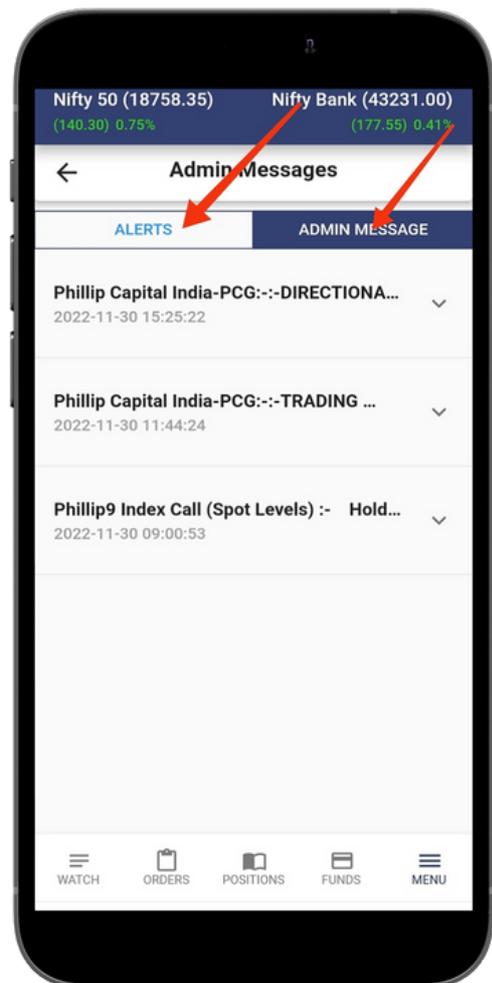
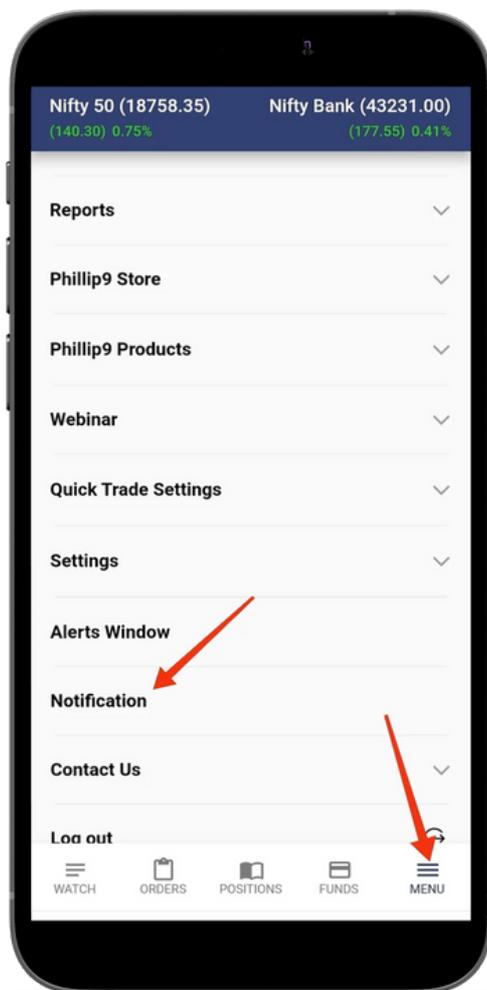
If you want to see your Ledger and P&L (Profit & Loss) reports then follow the below instructions

1. Go to Menu
2. Click on Reports
3. Here you can see your Ledger and Profit & Loss account.
4. You can also see your Capital (Cash Segment) and Futures by entering from date to date.



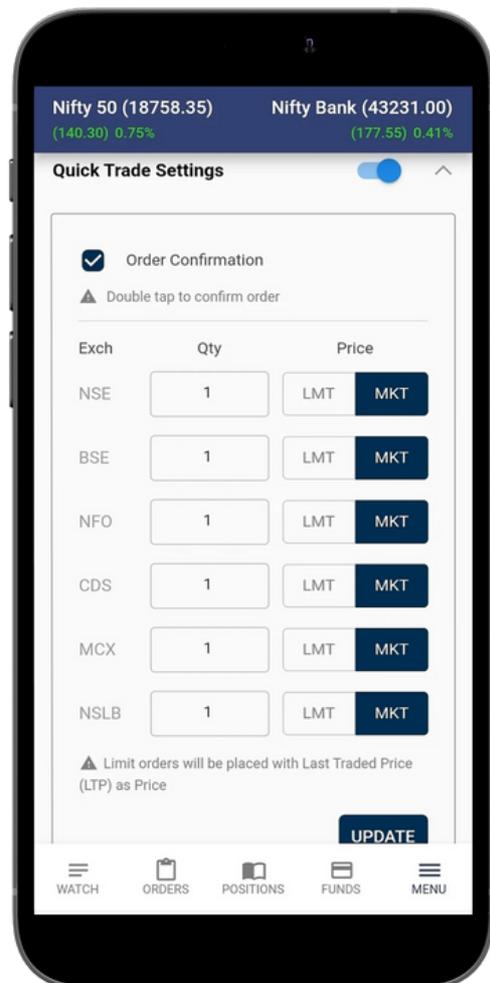
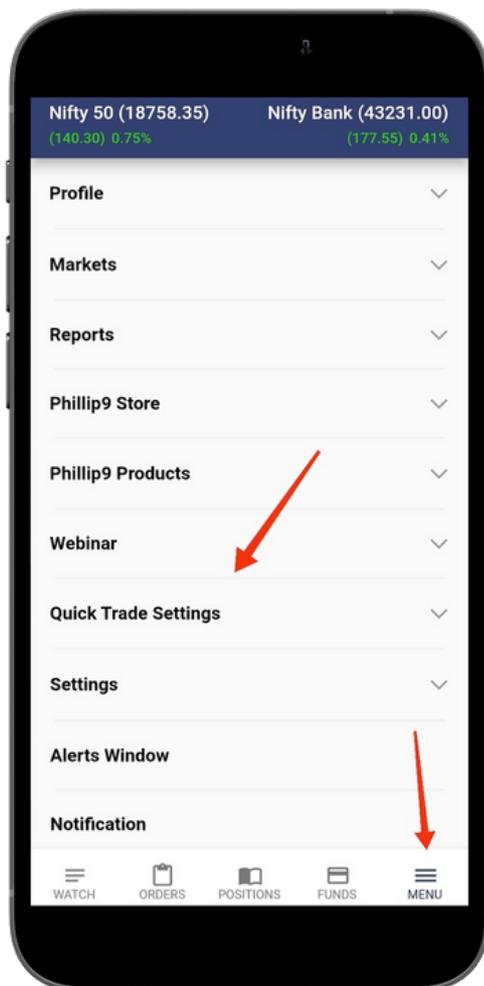
12. How to check Notifications in Phillip9 ?

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



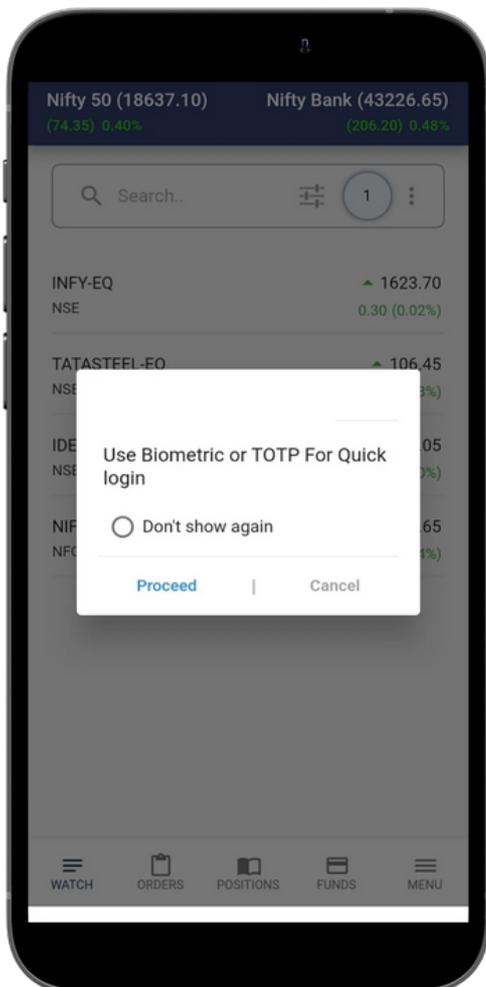
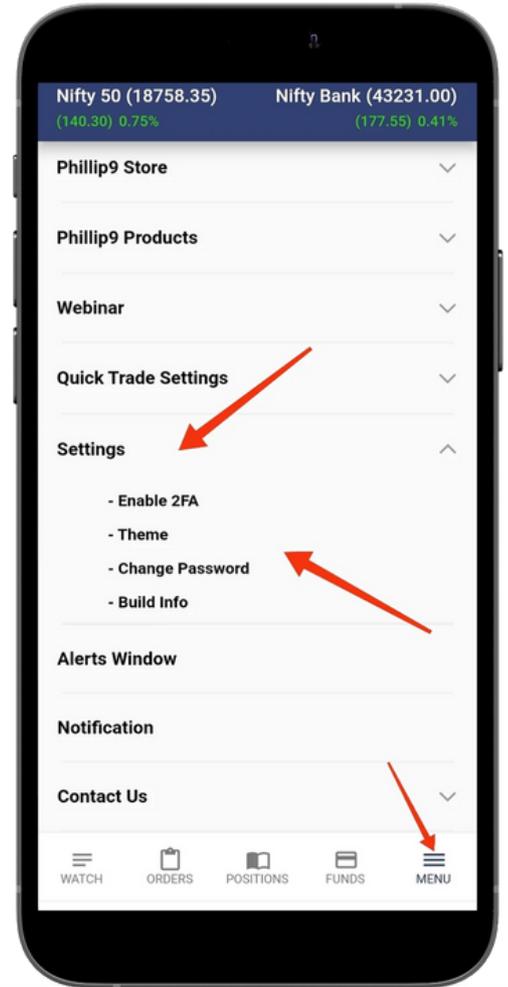
13. How can I change my Quick Trade Settings in Phillip9 ?

1. Go to "Settings"; then click on Quick Trade Settings
2. Order Confirmation: -Enabling the order confirmation system will reconfirm the order
3. You can see the exchanges on the left-hand side, BSE, NSE, MCX, & OTHER SEGMENT. In the middle column you can enter your desired quantity and on the right-hand side, there is a column of Price. Select any one option between Limit Trade and Market Trade.
4. Save the current changes.



14. How to change Settings in Phillip9 ?

If you want to change settings in Phillip9 go to "Menu", click on Settings & you will be able to change settings for the below options

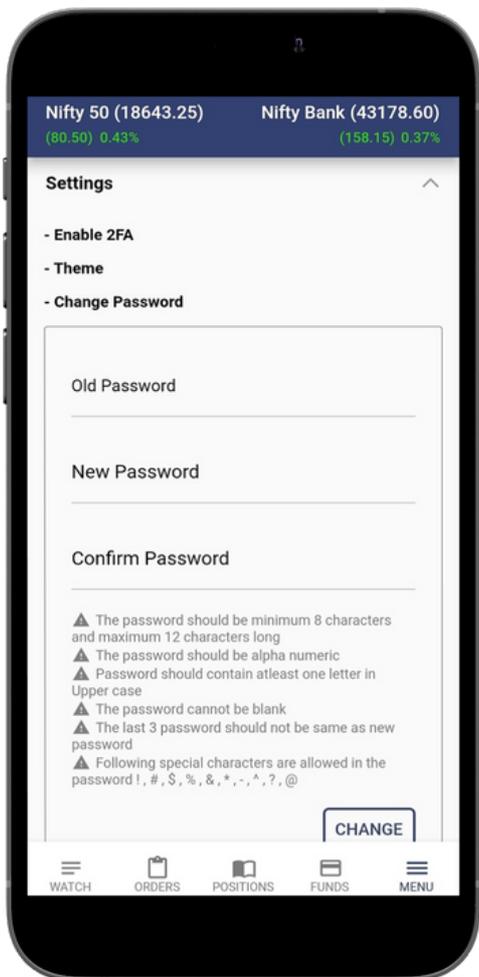
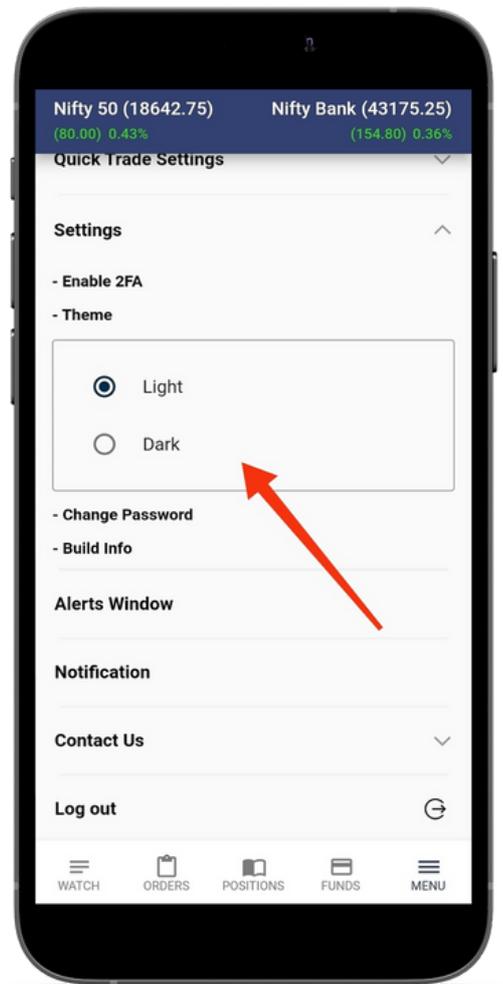


14.1. Enable 2FA-

To Enable 2FA users can authentic using TOTP or Biometric, please refer to FAQ point No.1 for more details

14.2. Theme

You can change the theme that is Light and Dark. Choose your desired one.

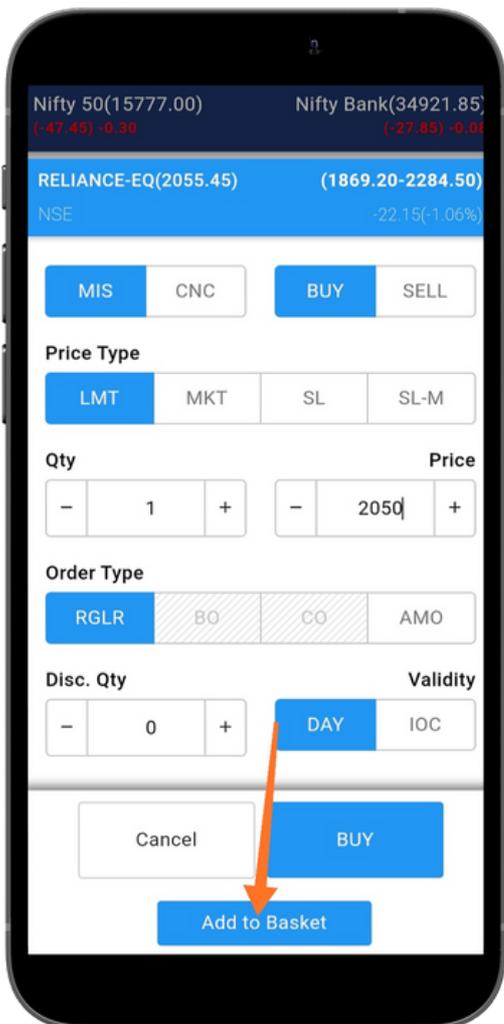
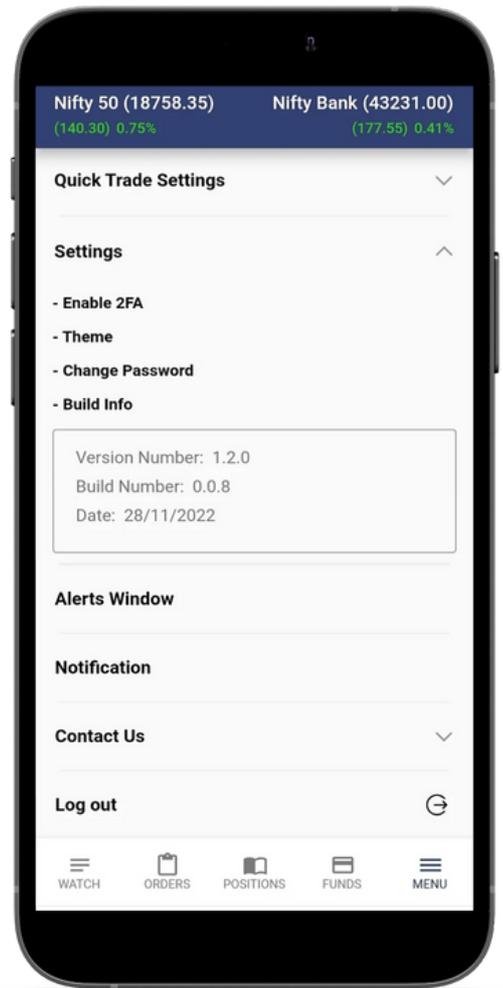


14.3. Change the Password

Enter the old password of Phillip9, enter your desired password in the new password section, and enter again your new password in confirm password section, by doing this you will be able to change your password.

14.4. Build Info

To check the latest version of the app

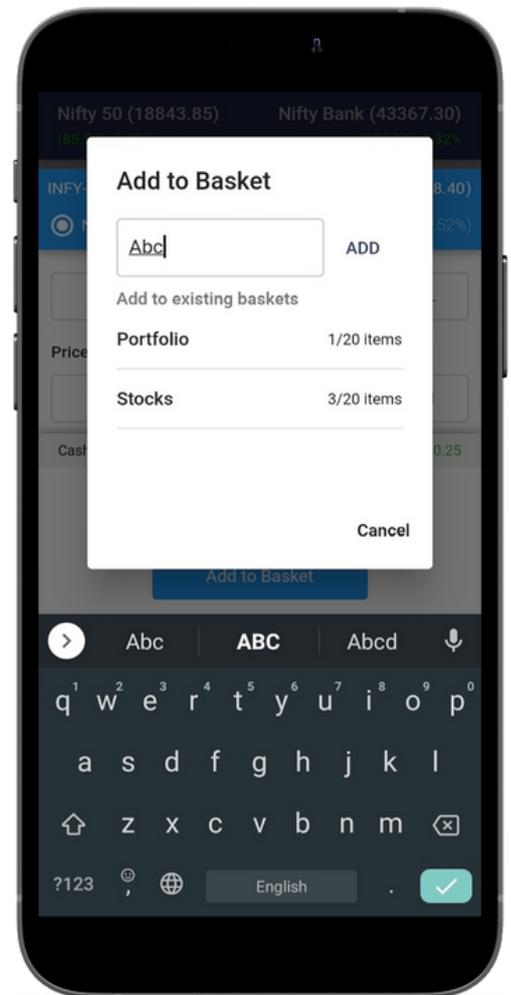


15. How to Use Basket Order?

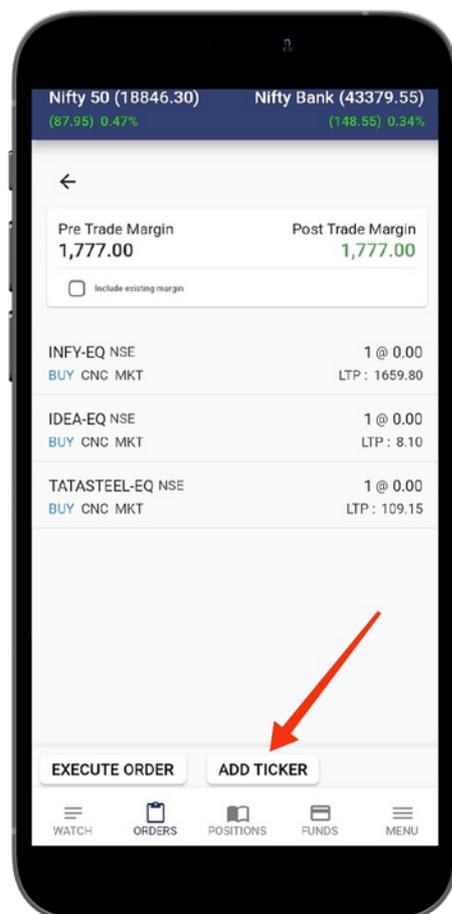
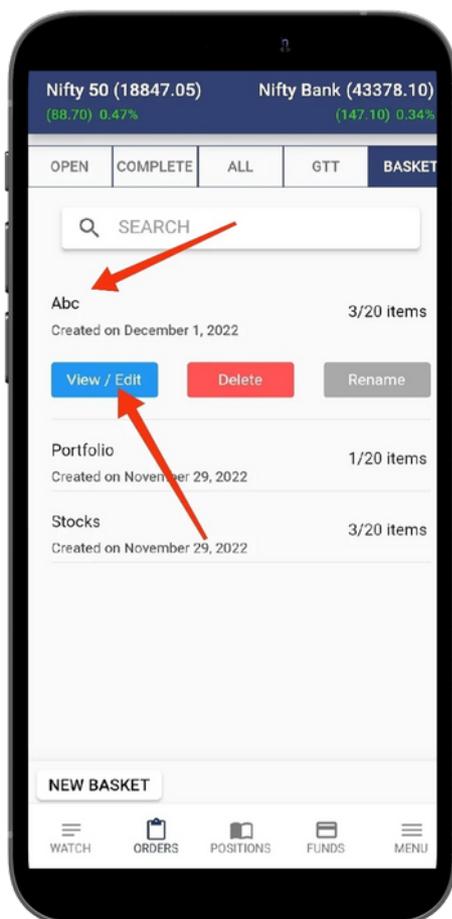
Basket Orders are useful when you want to place & execute multiple orders at different prices, different contracts, different segments & different strategies at one click.

15.1 Select the Contract or instrument equity, futures, and options that you wish to trade into which you wish to place your basket order.

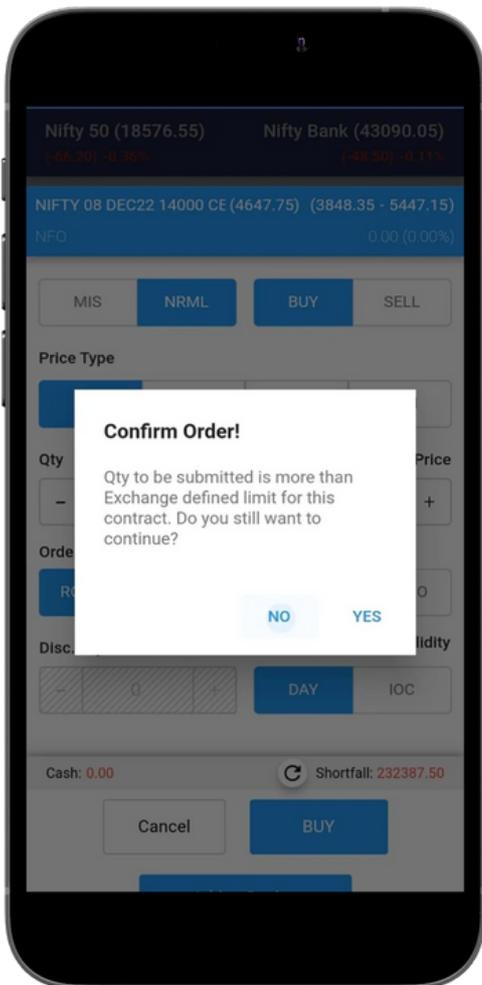
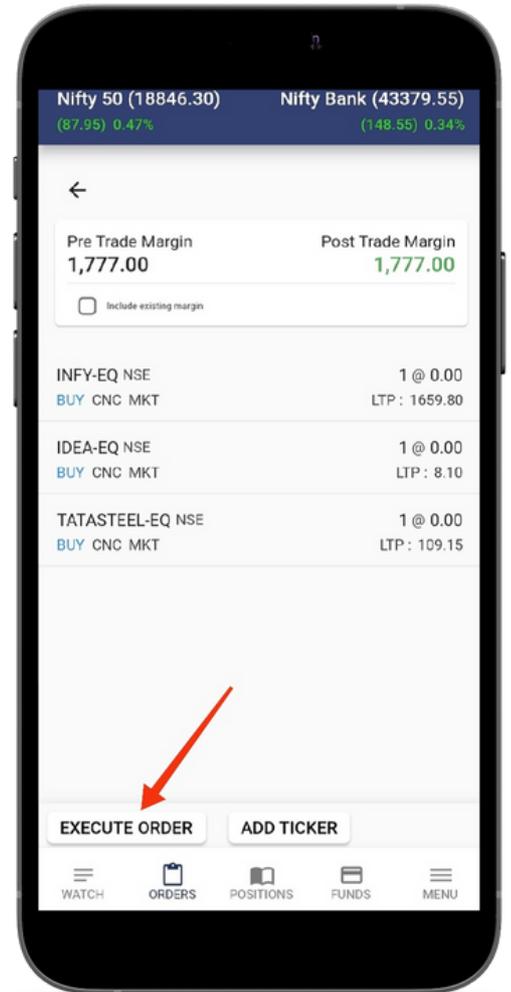
15.2. Enter the Script, Quantity, Price, Market Type, and select the option to add to Basket you can add a maximum of 10 scripts/contracts to add to Basket.



15.3. After adding orders in the Basket, you have to select execute option to place the buy or sell basket orders.



15.4. After Market Order (AMO Order)- Similar to Normal Basket Order user can use the AMO Basket Orders

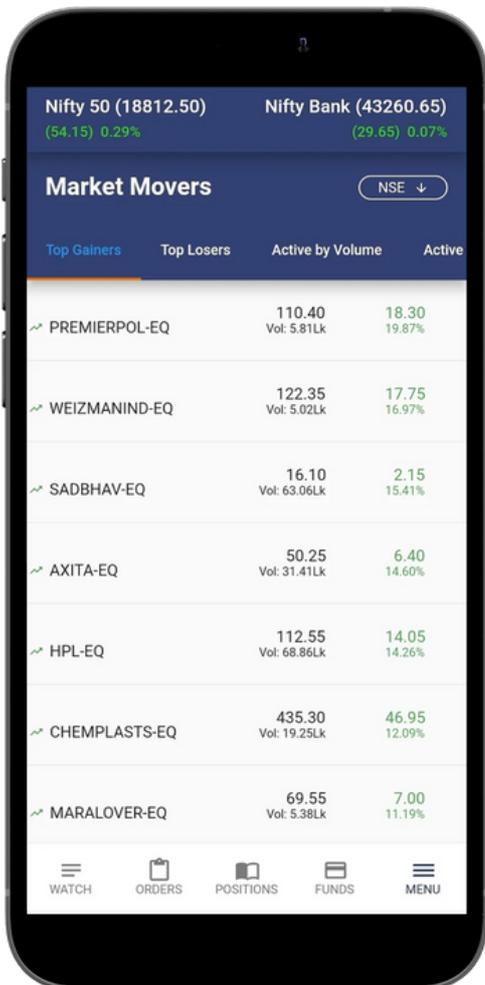
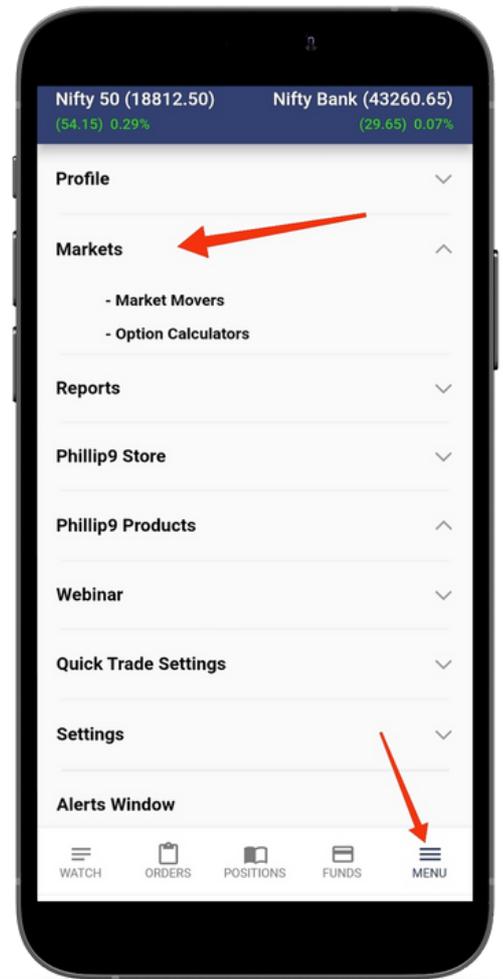


16. Phillip9 Features?

16.1 Slice Order

This feature will slice orders when the quantity to be submitted is more than the exchange-defined quantity limit for the scrip/contract is placed, slicing will be enabled only for limit orders.

16.2 Markets

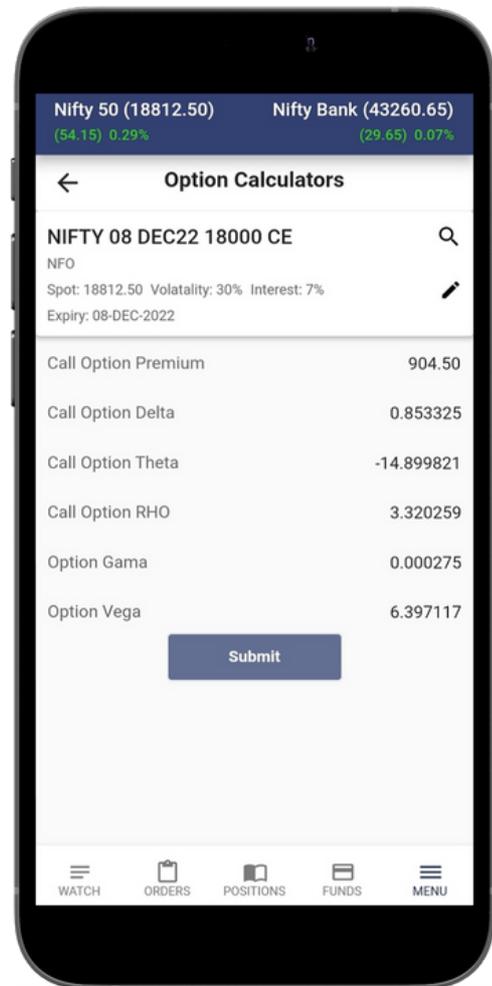
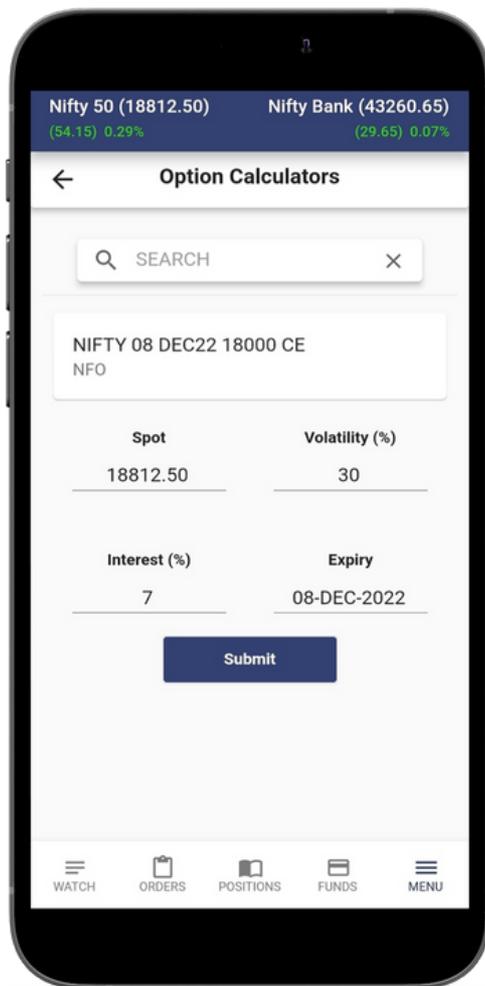


16.2.1 Market movers

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

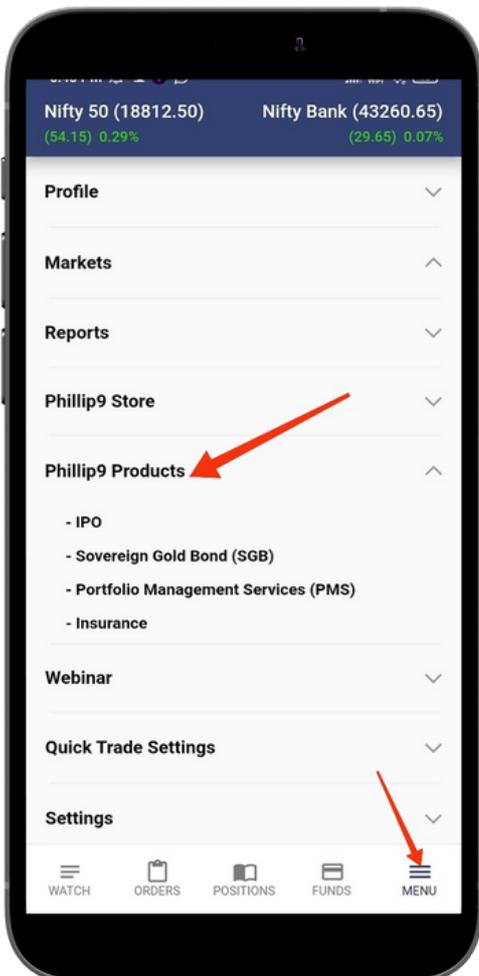
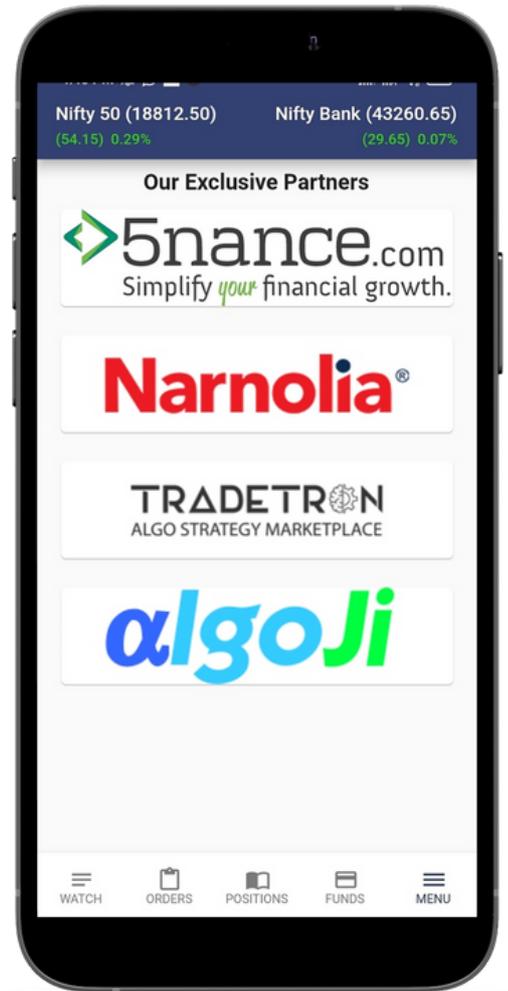
16.2.2 Option Calculator

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.



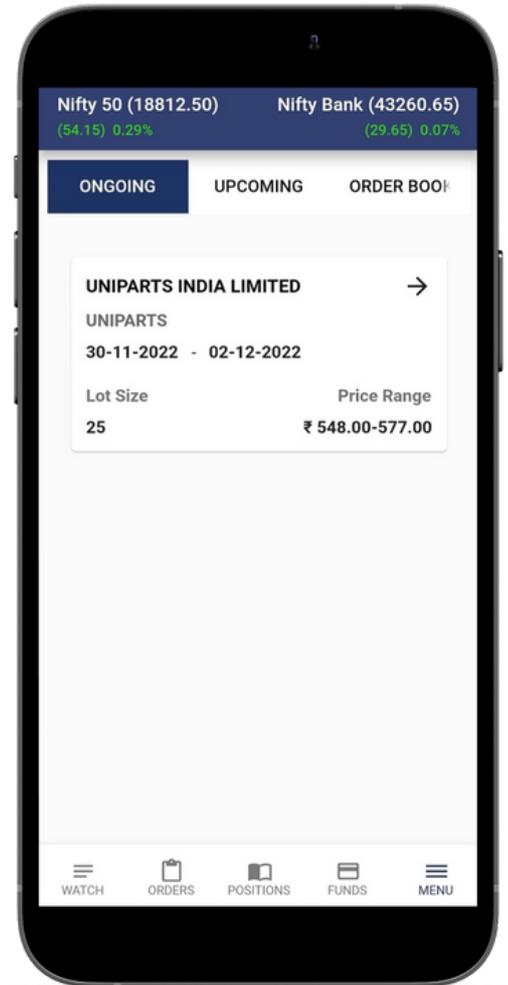
17. Phillip9 Products ?

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.

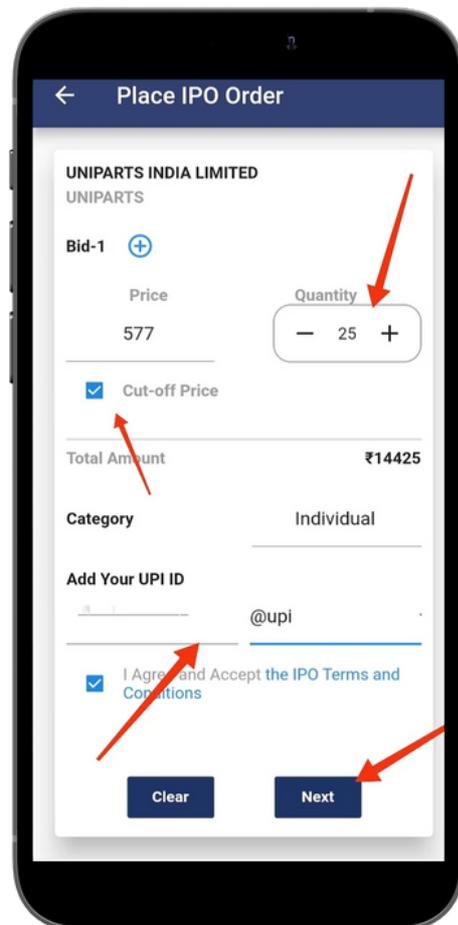
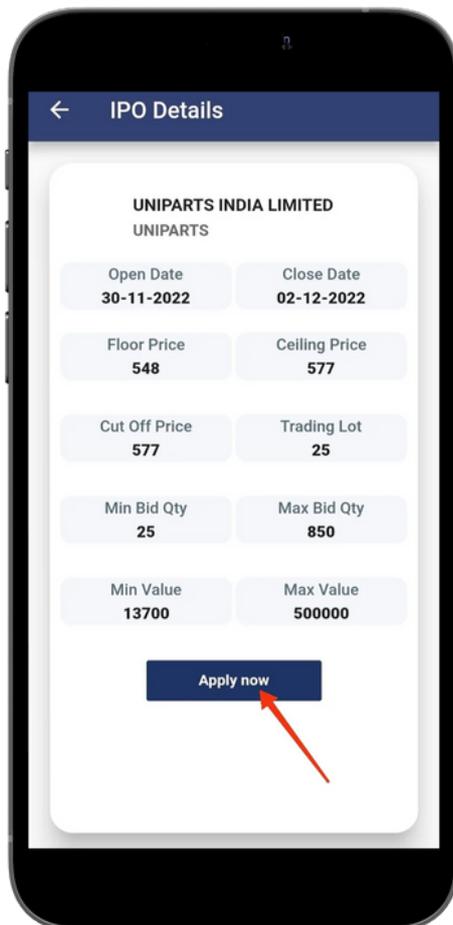
Step 2:

Select the IPO from Ongoing IPO list.



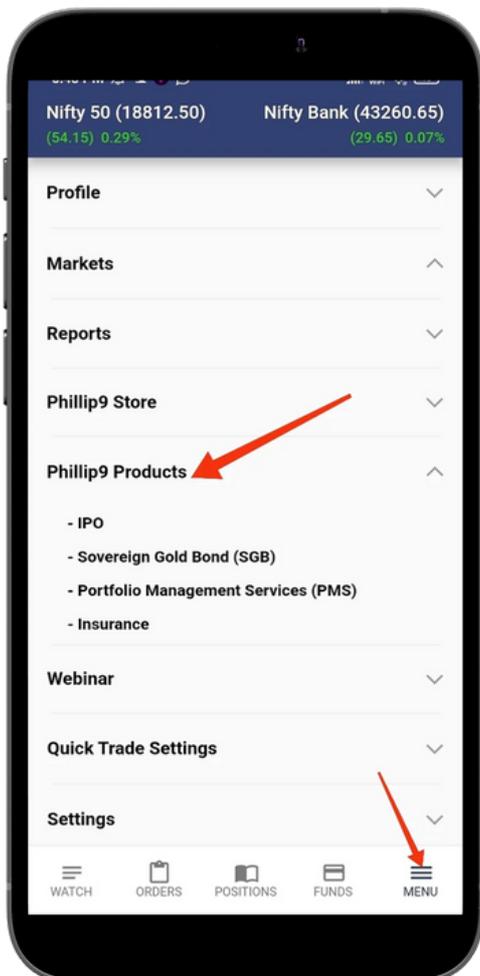
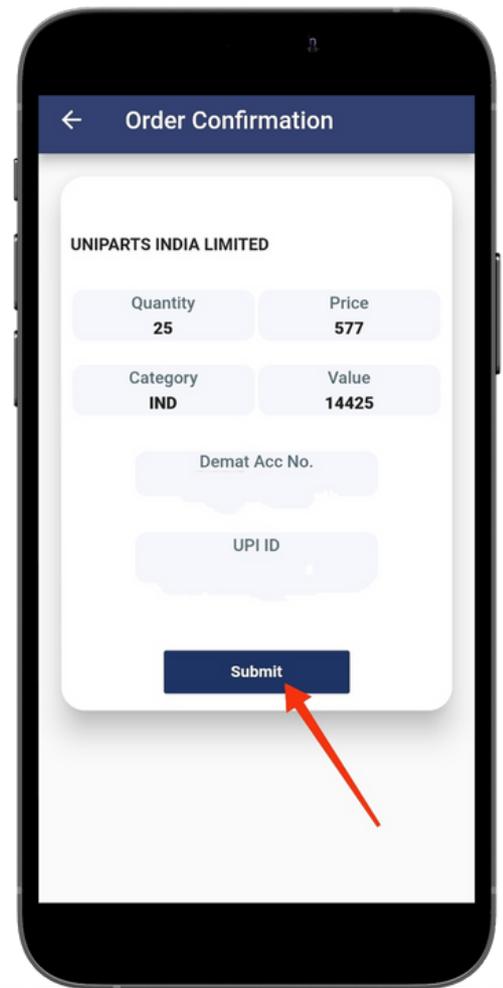
Step 3:

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)?

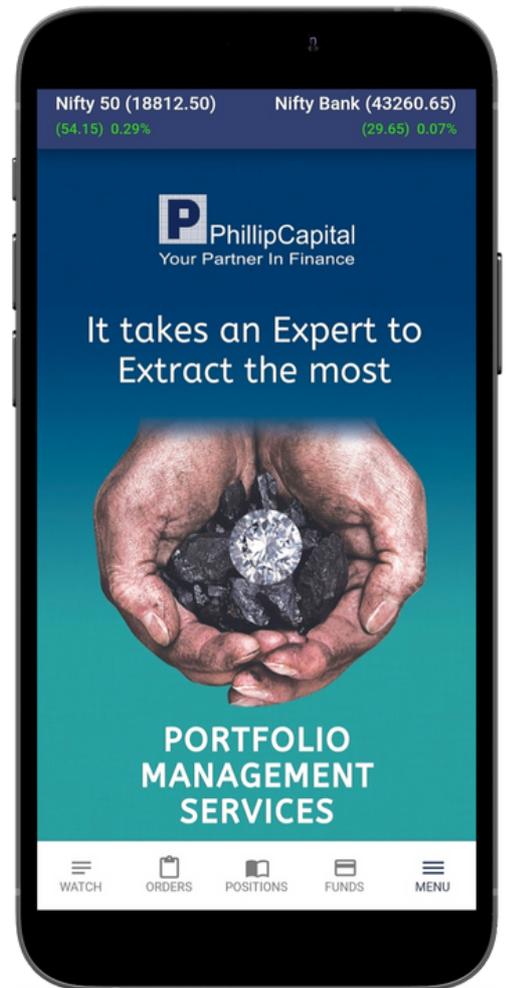
Step 1: Login to the Phillip9 Mobile app and select Sovereign Bond under Phillip9 Products under the “Menu” option.

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.

PhillipCapital (India) Pvt. Ltd.

Registered Office: No. 1, 18th Floor, Urmi Estate,
95 Ganpatrao Kadam Marg, Lower Parel West, Mumbai 400013

SEBI Registration Nos: Stock Broker- INZ000169632 (NSE, BSE, MSEI, MCX and NCDEX)

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Investment in the securities market are subject to market risks, read all the related documents carefully before investing.

Kindly note that past performance is not necessarily a guide to future performance.

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