

# iTRADE PRODUCTS AND SERVICES GUIDE



PRIVATE **Wealth**

## SANLAM ITRADE IS THE ONLINE TRADING PORTAL OF SANLAM PRIVATE WEALTH (SPW), WHICH WAS VOTED SOUTH AFRICA'S TOP WEALTH MANAGER BY INTELLIDEX FOR THREE YEARS IN A ROW.

As our online share trading client, you benefit from a wide range of options on our easy-to-use platform, including all the information you need, at your fingertips. You can make informed investment decisions, pro-actively manage your portfolio, and trade on the JSE as well as more than 20 global markets – at competitive rates. Whether you wish to invest on your own or let our team invest on your behalf, Sanlam iTrade has the products and tools to help you on your investment journey.

### BENEFITS OF ONLINE TRADING

- You'll be able to enjoy the quality, quantity and speed of information usually only available to professional investment managers.
- You can trade with direct market access (DMA) on our multi-asset, multi-device trading platforms.
- Our website is easy to use and available anywhere – from your office to the beach – on your laptop or mobile.

### CONTENTS OF THIS GUIDE

1. Trade JSE shares, warrants, ETFs and ETNs
2. Trade CFDs on JSE shares
3. Trade the world on iTradeGlobal
4. Comprehensive information and functionality on the iTrade website
5. iManaged – managed portfolios
6. Social media
7. Fully digital online registration
8. Virtual trading demos

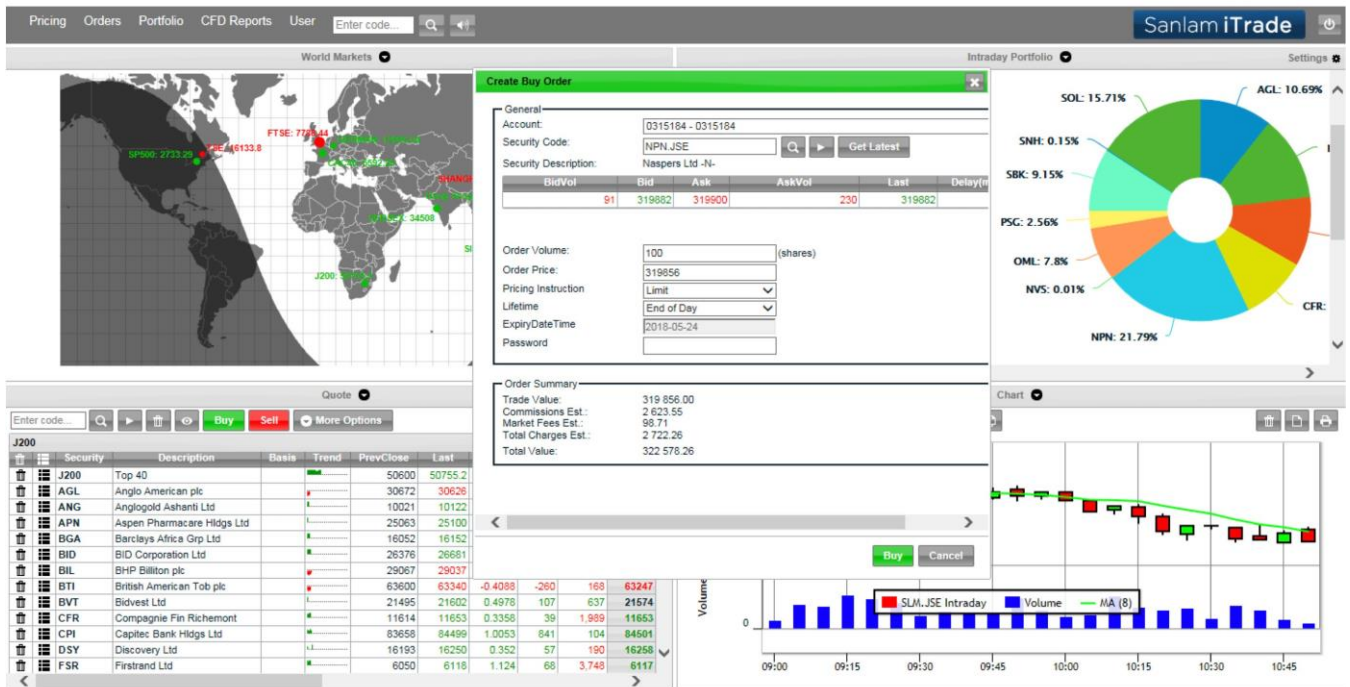
## RELIABLE, SIMPLE, INNOVATIVE ONLINE TRADING





## AN OVERVIEW OF THE PRODUCTS AND SERVICES AVAILABLE ON WWW.SANLAMITRADE.CO.ZA

### 1. TRADE JSE SHARES, WARRANTS, ETFs AND ETNs



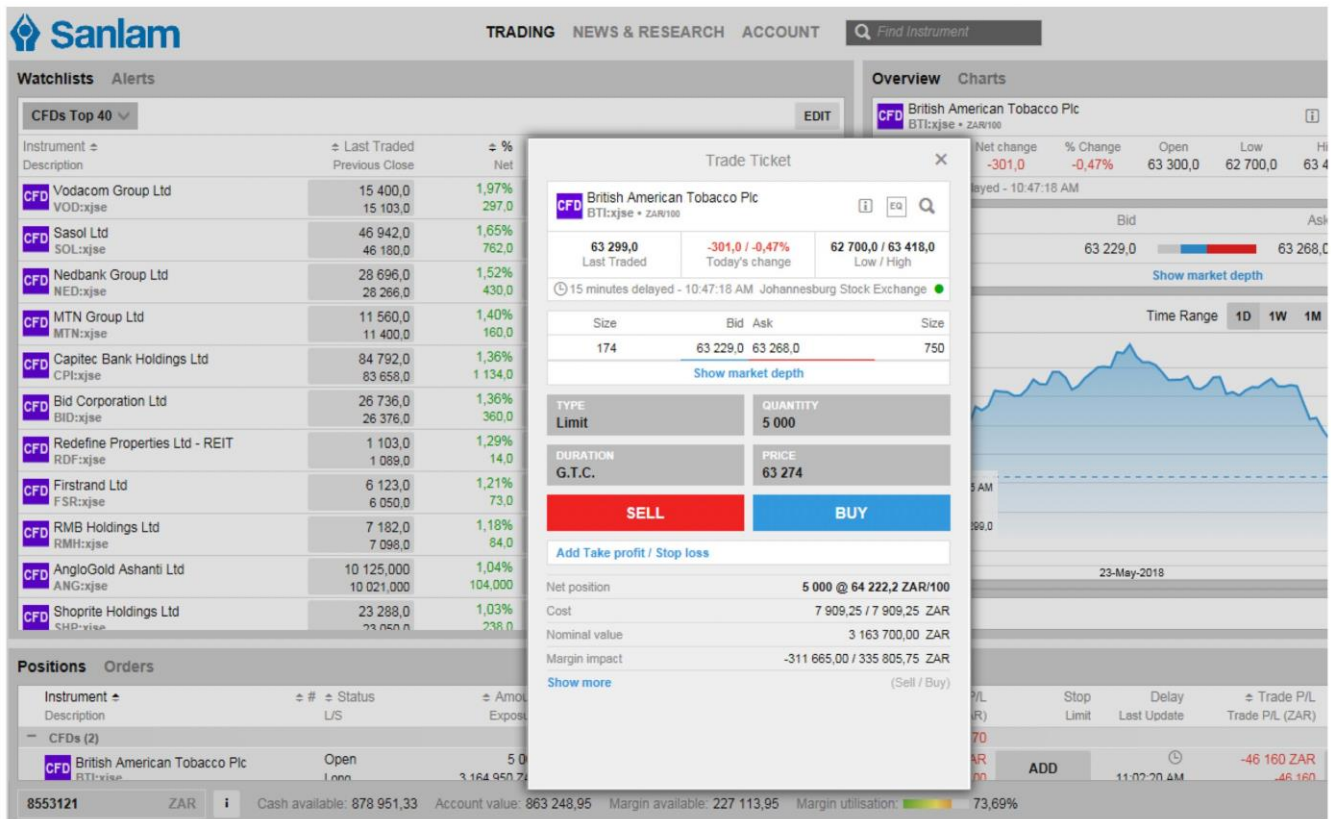
- Secure, fast online trading with more than 98% uptime at very competitive fees (see our costs [here](#)).
- State-of-the-art Iress trading platform which you can customise to your requirements.
- Live prices with market depth (5 best bids and offers). 150 live prices free per month (included in the standard monthly fee of R50 plus VAT).
- For immediate execution we have direct market access (DMA).
- Price alerts sent via e-mail or SMS for up or down triggers.
- Stop-loss orders to protect your portfolio from sudden downward movements.
- View your portfolio and trade on your mobile by downloading the Iress app.
- Click on the image on the right to view a video of the trading platform.

#### USING THE SANLAM iTRADE ONLINE TRADING PAGES





## 2. TRADE CFDs ON JSE SHARES



- You can trade CFDs of JSE shares on our advanced iTradeGo trading platform.
- Traders trade CFDs for these reasons: lower costs (0.35% vs 0.5%) as well as gearing and short selling.
- While some competitors quote their own bids and offers on CFDs, with iTrade you trade the JSE spot price for a CFD, ensuring that you get the 'true' market price. This protects clients from misleading CFD quotes made by some trading platforms.
- Not only do we empower you to trade at the exact JSE price, but our fees are also listed separately, not in the spread, which means we're fully transparent.
- CFDs are not regulated by the JSE. You therefore run full capital risk with smaller CFD platforms if they go bankrupt. With us you can trust the Sanlam balance sheet.
- Our CFD platform is multi-device HTML5 so you can access it from any device: PC, laptop or mobile. No need to download an app. You can trade and view your portfolio and watch-lists.
- Set trailing stop-losses to protect your portfolio from sharp declines.
- If your margin falls below pre-determined levels, we will automatically close positions to maintain the margin.
- For more information, click [here](#).

DOWNLOAD THE CFD TRADING GUIDE [HERE](#)

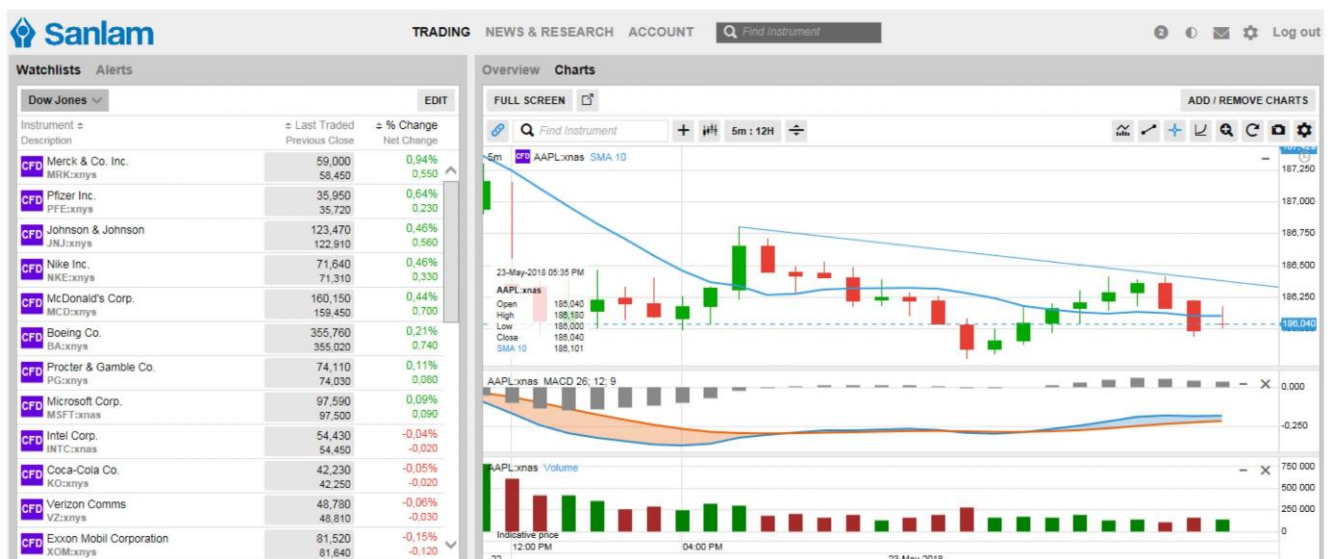




## 3. TRADE THE WORLD ON iTRADE GLOBAL

### ACCESS WORLDWIDE TRADING AND INVESTING OPPORTUNITIES FROM ANY DEVICE 24/7

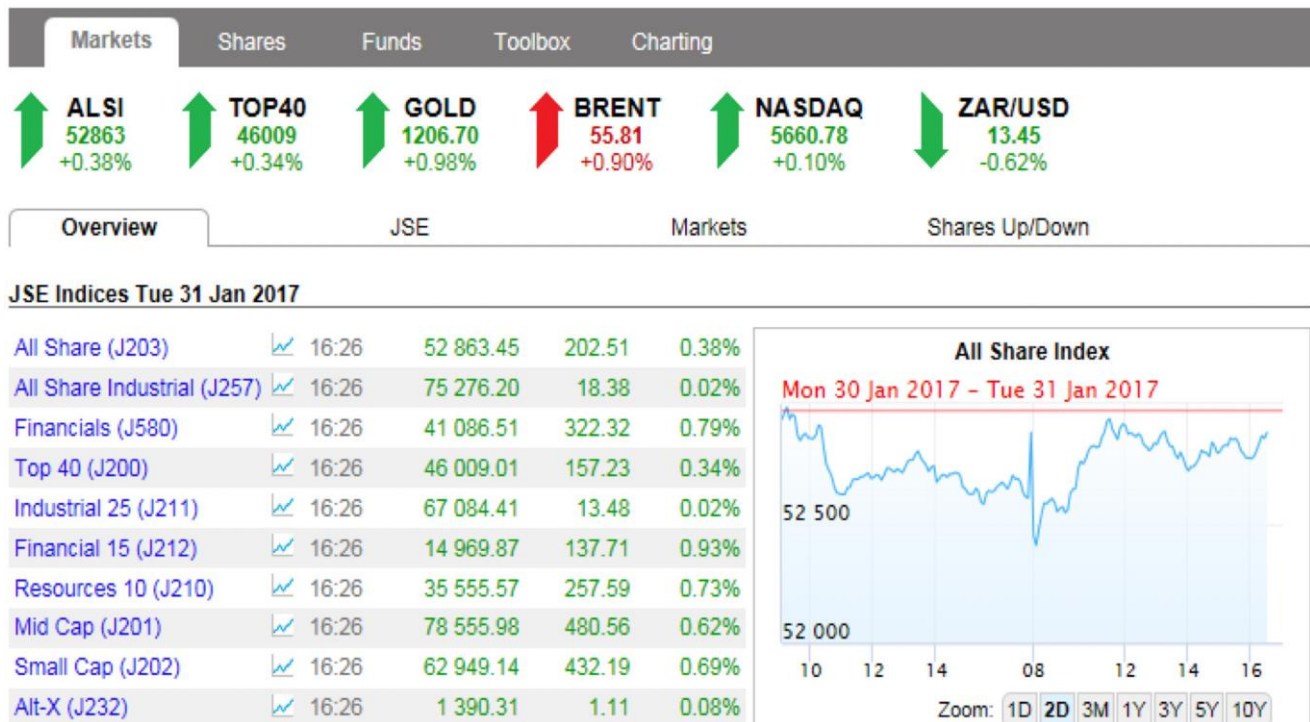
- Trade on more than 20 global exchanges on our advanced iTradeGo platform from your desktop or from anywhere on the internet or your mobile. Fast and simple HTML5 cross-device experience. No app required.
- Trade equities (EQ), exchange traded funds (ETFs) and exchange traded commodities (ETCs) on all major markets worldwide.
- You can use your own foreign allowance of R10m (plus R1m travel allowance) per year or Sanlam's asset swap.
- Minimum investment is R100 000. Click [here](#) for a list of available exchanges, commissions and minimums.
- Free live prices for most European markets. Click [here](#) for all live price costs.
- Advanced charting with technical analysis tools, including intra-day.





## 4. COMPREHENSIVE INFORMATION AND FUNCTIONALITY ON THE iTRADE WEBSITE

- Daily market commentaries and analysis.
- Intra-day tables with graphs of market indicators like JSE indices, global indices, currencies and commodities.



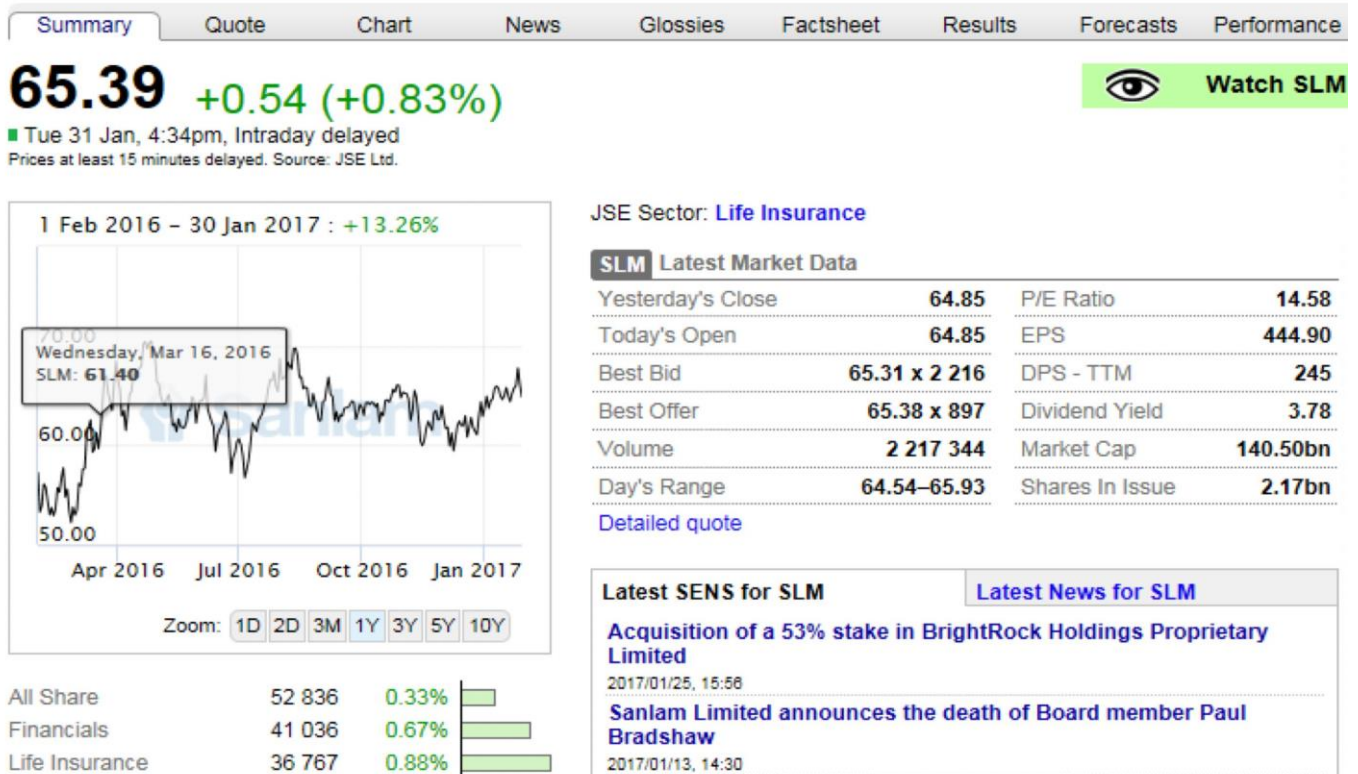
- Comprehensive end-of day charts of all JSE shares, JSE indices, currencies, global indices and commodities with technical analysis tools like moving averages, stochastics, MACD and RSI.





- Comprehensive share data on every listed share, including 10 years of financial statements, annual company reports, consensus broker forecasts with three years' forecast headline earnings per share (HEPS), detailed fact sheets and performance statistics, a searchable SENS news archive and much more.

## Sanlam Ltd. - SLM



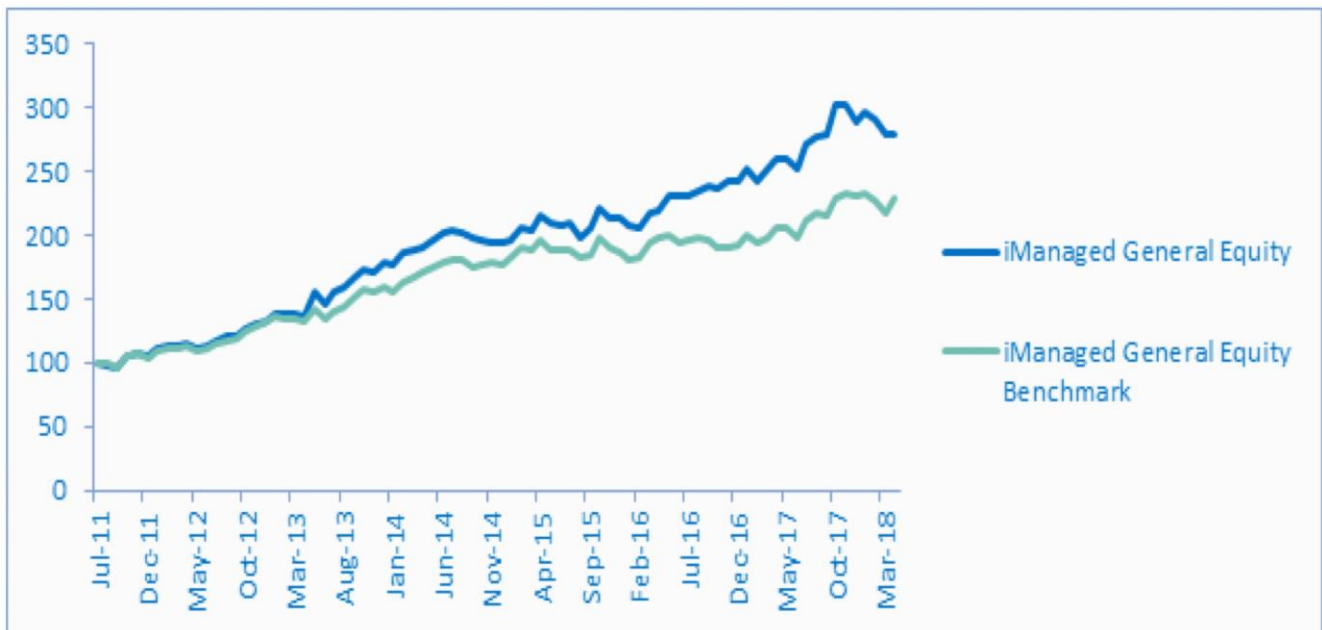
- Research on most Top 100 companies as well as a host of smaller shares.
- Live JSE SENS news enables you to receive sensitive news at the same time as any stockbroker on the JSE. By the time the broker places orders for his or her biggest clients, thousands of our clients could have traded.
- Watch-lists and price alerts to keep on top of shares you own or want to own.
- Learning centre with the Shares Made Simple online education courses. There is also a virtual trade simulator so you can gain experience without risk.

PLEASE VIEW DEMO'S FOUND ON THE LAST PAGE



## 5. iMANAGED – MANAGED PORTFOLIOS

NOT READY TO INVEST ON YOUR OWN?  
LET SANLAM PRIVATE WEALTH INVEST FOR YOU.



30-Apr-18	Sanlam Private Wealth - Performance at 30 April 2018							
Portfolio (gross of fees)	Apr-2018	Year to date	12 months	2 years *	3 years *	5 years *	Since inception *	Inception date
iManaged general equity	6.11%	2.20%	13.85%	16.12%	11.03%	16.63%	17.45%	01-Aug-11
JSE All Share Total Return Index	5.40%	-0.90%	11.45%	7.92%	5.28%	11.75%	13.11%	01-Aug-11

- iManaged portfolios are individual share portfolios, not unit trusts. Individual shares are registered directly in the client's name, providing ownership and full JSE protection under the JSE Fidelity Fund.
- Distinct from the customised personalised portfolios offered by Sanlam Private Wealth (SPW) to clients investing more than R1m, the iManaged portfolios are not individually tailored, but are strictly managed according to model portfolio guidelines. Clients therefore benefit from access to the expertise, experience and excellent track record of the SPW investment team.
- The minimum investment is R200 000 and portfolio management fees are 1.5% per year, calculated monthly on the value of the portfolio. There is also a small custodian fee of R300 per year. Transaction costs are kept in line with iTrade's low fee structure (see our costs on the website).
- You may at any stage change your account status to self-manage the portfolio. There will be no cost to do this as the shares will already be in your BDA account with the JSE.
- Two iManaged portfolios are available:
  - General Equity Portfolio
  - Dividend Income Portfolio.

FOR MORE INFORMATION ON IMANAGED PORTFOLIOS, CLICK [HERE](#)





## 6. SOCIAL MEDIA

- Why is social media important? Most news breaks on social media first before it appears on the online news channels and only much later in print media. Journalists tweet live from media conferences before they write stories. It's important to follow us and reputable journalists to see the news first.
- Sanlam iTrade is the leader on social media in the online trading industry in SA, with more than 12 000 followers on Facebook, and 2 500 @SanlamiTrade and 4 500 @iSayiTrade followers on Twitter. The iSayiTrade blog provides excellent education and market analysis blogs. Sanlam iTrade is also active on LinkedIn, YouTube and Instagram. Click on the links below to follow.



**THERE ARE MANY VIDEOS ON OUR YOUTUBE PAGE THAT SHOW HOW OUR WEBSITE WORKS. JUST CLICK ON THE YOUTUBE LINK ABOVE.**

## 7. REGISTER

**[CLICK HERE](#) FOR A FULLY DIGITAL ONLINE REGISTRATION AND FICA PROCESS**

## 8. VIRTUAL TRADING DEMOS

Not ready to trade real shares yet? Try demo trades on our virtual trade simulator (VTS) and get limited access to some of the information and features on the website.

REGISTER

LOCAL JSE TRADING DEMO – REGISTER AS AN iVIEW CLIENT

REGISTER

JSE CFD TRADING DEMO

REGISTER

SA RESIDENTS GLOBAL TRADING DEMO

REGISTER

NON-RESIDENTS GLOBAL TRADING DEMO

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