



# Investing made easy with FNB Stockbroking and Portfolio Management.

Manage your investment portfolio on our **Local Shares** platform.

We've simplified how you invest in the full range of JSE listed Shares, Exchange Traded Funds (ETFs), Exchange Traded Notes (ETNs), Warrants, CFDs, Bonds and Preference Shares.



# **Step 1: Open a Local Shares account**

We've made it **quick** and **easy** for you to register and open an account online.

Vist our website at [shares.fnb.co.za](https://shares.fnb.co.za) and **register online.**

- 1. Select Open Account**
- 2. Opt for a Local Shares account** and complete the online **application process**
- 3. Save and submit** your application: your account should take 24-48 hours to open
- 4. Should you require assistance, contact us at [shares@fnb.co.za](mailto:shares@fnb.co.za)**



## Step 2: Fund your account

There are **2 easy options** to fund your account with FNB's digital channels.

### OPTION 1

Invest when you can **online** or on the **FNB App**

1. Create a **new beneficiary**
2. Select **pay a public recipient**; search for FNB Stockbroking
3. Use your FNB Stockbroking and Portfolio Management account number **as your reference**

### OPTION 2

Alternatively, fund when you can by doing an **Electronic Funds Transfer** into the following account:

Account Name:	<b>FNB Stockbroking</b>
Bank:	<b>FNB</b>
Account No.:	<b>50970032229</b>
Branch:	<b>Corporate Services (Bank City)</b>
Branch Code:	<b>255005</b>
Reference:	<b>Your Stockbroking and Portfolio Management account number</b>



## Step 3: Place your first trade

Trade on [shares.fnb.co.za](https://shares.fnb.co.za) or on the FNB App.

### Placing a trade online:

1. **Login** to [shares.fnb.co.za](https://shares.fnb.co.za) and select **My Portfolio**
2. Select **Trade** and enter the **share code** of the share you want to trade
3. Select **Buy/Sell** and input trade parameters i.e. Order Type, Price, Quantity and Duration (GTC – Good till Cancelled, GTF – Good till Friday)
4. Once inputs are complete, accept the disclaimer and **confirm** your order and enter your **password** to place the trade

### Placing a trade on the FNB App:

1. **Login** to the FNB App and navigate to **My Investments**
2. Select **Share Portfolio** and **Local Shares** Account
3. Select **Trade** and the shares you wish to trade
4. Select **Buy/Sell**, input your trading parameters and select **Continue**



## **Step 4: Maintaining your Local Shares account**

**Login to [shares.fnb.co.za](https://shares.fnb.co.za)**

**Select **My Account**> **Account Maintenance** to access:**

1. Password changes
2. Notifications
3. Personal Details
4. Contact Details
5. Pricing Options

**Select **Dashboard** to access:**

1. Portfolio Overview
2. Account Activities

**Access your **statements**:**

- 1. Select **My Account** and **My Reports****
- 2. Select the account, year and statement type**

**Select **Market Tools** to access:**

1. Research
2. Watchlists
3. Quotes
4. Index Constituents

# Navigating volatile markets

Risk measures such as **stop-loss** or **take-profit** can protect you from unforeseen market movements.

## Stop-losses

Used by investors and traders to execute strategies effectively. There are two kinds that can be utilised:

### 1. Stop-loss/Hard stop-loss

An order that an investor or trader adds to their position after executing a trade that automatically exits the position when the trade price reaches a certain level. Positions are closed automatically without traders and investors having to continuously monitor the position.

### 2. Trailing stop-loss

Also used to limit downside risk and exit a position at a certain level. The difference is that when the price moves in the investor's or trader's favour the stop-loss moves in the same direction (trails the position), adjusting the stop-loss set. The price level is not fixed; the distance is.

### How to place a **stop-loss** order

1. Login to **shares.fnb.co.za**
1. Select **My portfolio** and select **Portfolio Detail**
2. Click on the three dots under **More** on the right-hand side of your screen, then select **Stop-Loss**
4. Enter the share and the volume you intend on trading
5. Select the duration of the order
6. Under **Type** select **Stop Order**
7. Under **Stop** insert the trigger price
8. Under **Stop limit** insert the price limit you intend to keep should the stop-loss be triggered

### How to place a **trailing stop-loss** order

1. Login to **shares.fnb.co.za**
2. Select **My portfolio** and select **Portfolio Detail**
3. Click on the three dots under **More** on the right-hand side of your screen, then select **Stop-Loss**
5. Enter the share and the volume you intend on trading
6. Select the duration of the order
7. Under **Type** select **Trailing Order**
8. Insert trailing percentage

### Take-profit

An order used by investors and traders to close out a favourable position once it reaches a certain level of profit. When the profit target is reached on the trade, the position is automatically closed at the selected profit take price. In combination with the stop-loss, this helps investors and traders identify their risk to reward ratios.

Using these orders allows for fixed risk to reward ratios and eliminates emotional decisions when the market moves either way. Take-profit orders are used by investors to guarantee the profit once reaching a certain price level, without the price moving against them and reducing the potential profit.



For queries call us on **0800 256 256**  
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