

Baiduri Invest

User Guide

Table of Contents

1	Login overview	<u>4</u>
2	First time login	<u>5</u>
3	Login	<u>6</u>
4	Reset password	<u>7</u>
5	Logout	<u>8</u>
6	Platform overview	
	6.1 Console	<u>9</u>
	6.2 Workspaces	<u>10</u>
	6.3 Custom Workspaces	<u>11</u>
	6.4 Adding/Removing Widgets	<u>12</u>
7	Placing orders (Buy/Sell)	
	7.1 via Watchlist	<u>13</u>
	7.2 via Stock Profile	<u>14</u>
	7.3 Filling in an Order Ticket	<u>15</u>
8	Recurring Subscription Plan	
	8.1 What is Recurring Subscription Plan	<u>16</u>
	8.2 How to set Recurring Subscription Plan	<u>16</u>
	8.3 How to cancel Recurring Subscription Plan	<u>18</u>
9	Order management	
	9.1 View active order	<u>19</u>
	9.2 Amend or Cancel an order	<u>20</u>
	9.3 View historical orders	<u>21</u>
10	Viewing your portfolio	<u>22</u>
11	Currency conversion	<u>23</u>
12	Learn more	<u>24</u>

About Baiduri Invest

[Table of Contents](#) >

Through **Baiduri Invest**, you can invest in stocks and ETFs listed on major global markets including the US, Singapore, Malaysia, Hong Kong, and China (China A-Shares via the Shanghai-Hong Kong Connect).

With a suite of modern intuitive tools at your fingertips, your search for investment opportunities has never been more seamless.



Once you're logged into the platform, you can enjoy the key features of Baiduri Invest as follows:



Powerful analytic tools



Rich chart indicators



Personalised dashboard



Diverse order types



Mobile-friendly



Custom economic news



Extended trading hours



FX currency conversion



Instant live pricing (with subscription)



Simplified manage subscriptions



Extended order history

1 Login Overview

[Table of Contents](#) >

Accessing Baiduri Invest

Direct link to Login page

Go to <https://baiduricapital.globaltradingnetwork.com/rubix/login>

You will then reach the login page of Baiduri Invest.

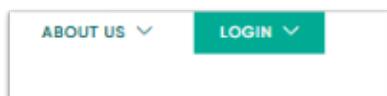
Through Baiduri Capital website

Step 1

Visit the Baiduri Capital website or go [here](#).

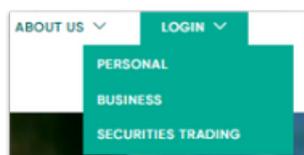
Step 2

Look at the top right section of the website and go to **Login**.

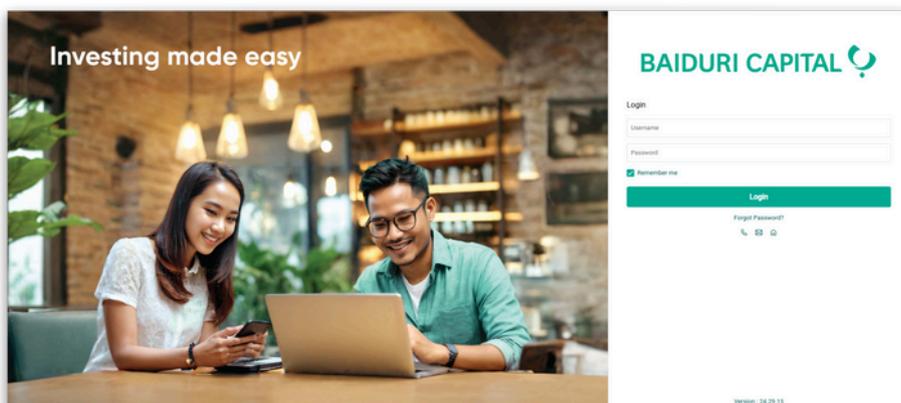


Step 3

Click or tap on **Securities Trading**.



You will then reach the login page of Baiduri Invest.



2 First time login

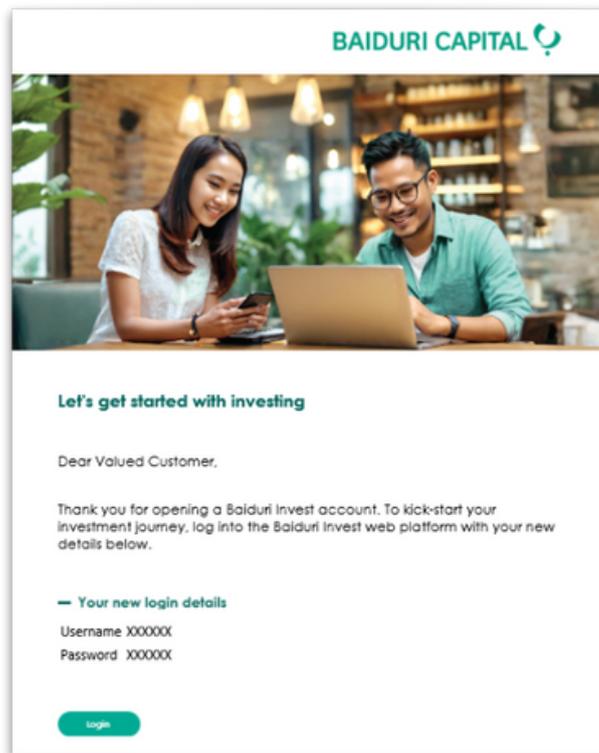
[Table of Contents](#) >

What to expect when you login for the first time

Step 1

Once your account is ready, you will receive an email containing your Username and Password.

Click or tap on the **Login** button to be directed to the login page.



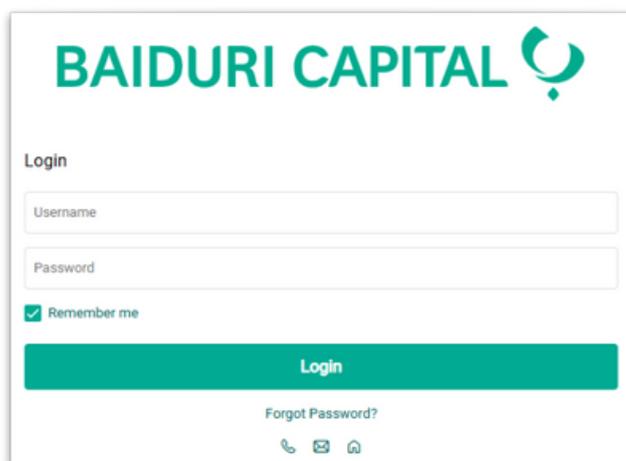
Step 2

Enter the username and password provided in the email.

Step 3

Follow the instructions to set up your new password.

After setting up your new password, you may log in.



3 Login

[Table of Contents](#) >

How to login to your Baiduri Invest account

Step 1

Once you've reached the Baiduri Invest login page, enter your username and password.

Step 2

Click or tap on **Login**.

Step 3

Check for the OTP (One-Time Password) sent to your registered mobile number and email address.

Your One-Time Password (OTP) from Baiduri Capital for the online trading account is: 7793. If suspicious, please call [2268588](tel:2268588)

Step 4

Enter the OTP and **Submit**.

You've successfully logged in.

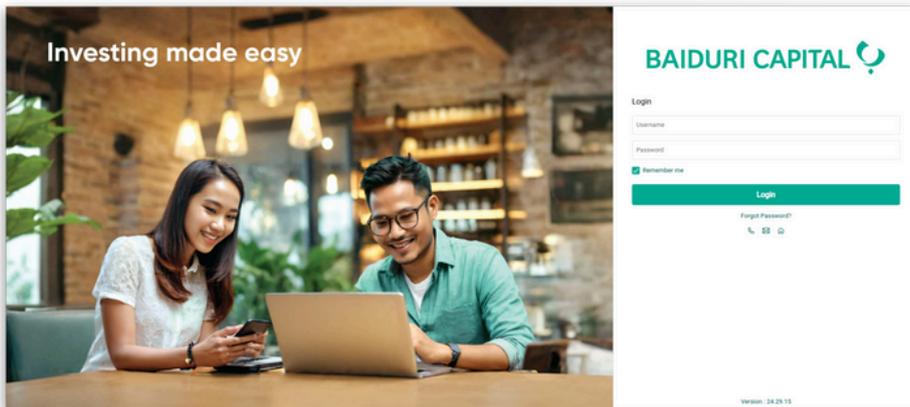
4 Reset Password

[Table of Contents](#) >

Reset your password

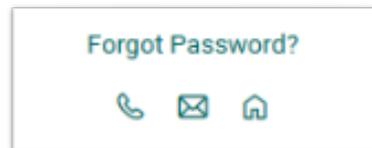
Step 1

Go to the Baiduri Invest login page.



Step 2

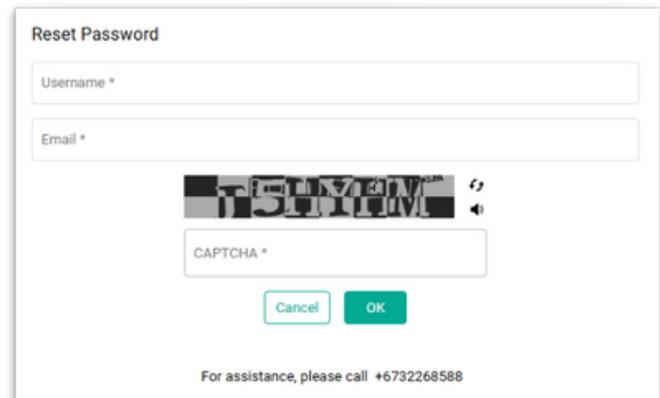
Click on Forgot Password?



Step 3

Enter your username. In the email field, enter **baiduricapitalservices@baiduri.com**.

Note: Use the above email to ensure your password request is received.



Step 4

Complete the CAPTCHA and select **OK**.

Step 5

Check for the OTP (One-Time Password) sent to your registered mobile number and email address.

Step 6

Enter the OTP and follow the instructions to reset your password.

Alternatively, you may contact Baiduri Capital at baiduricapitalservices@baiduri.com to request a password reset.

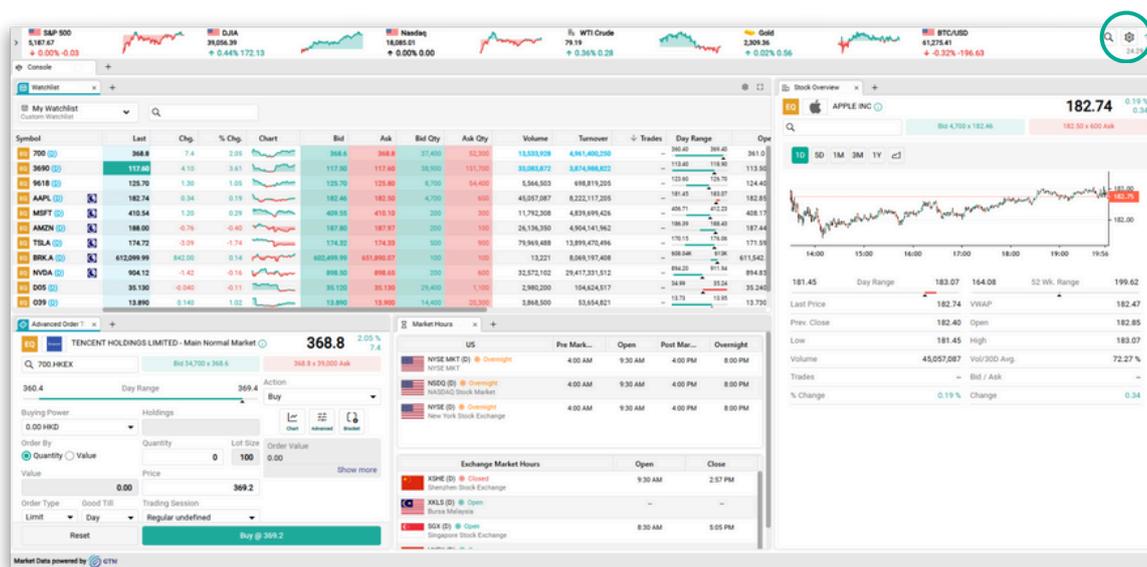
5 Logout

[Table of Contents](#) 

How to log out of your Baiduri Invest account

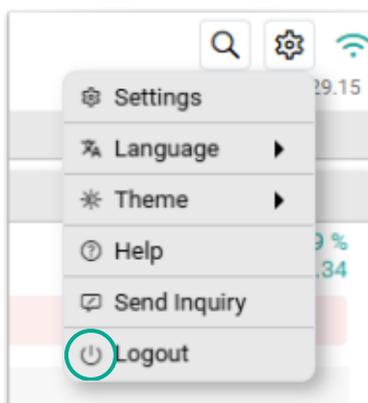
Step 1

In the platform, go to the **settings** icon at the top right of the screen.



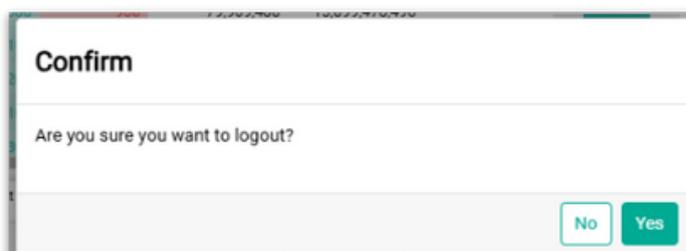
Step 2

Click or tap **Logout**.



Step 3

Click or tap **Yes** to confirm and proceed with logging out.

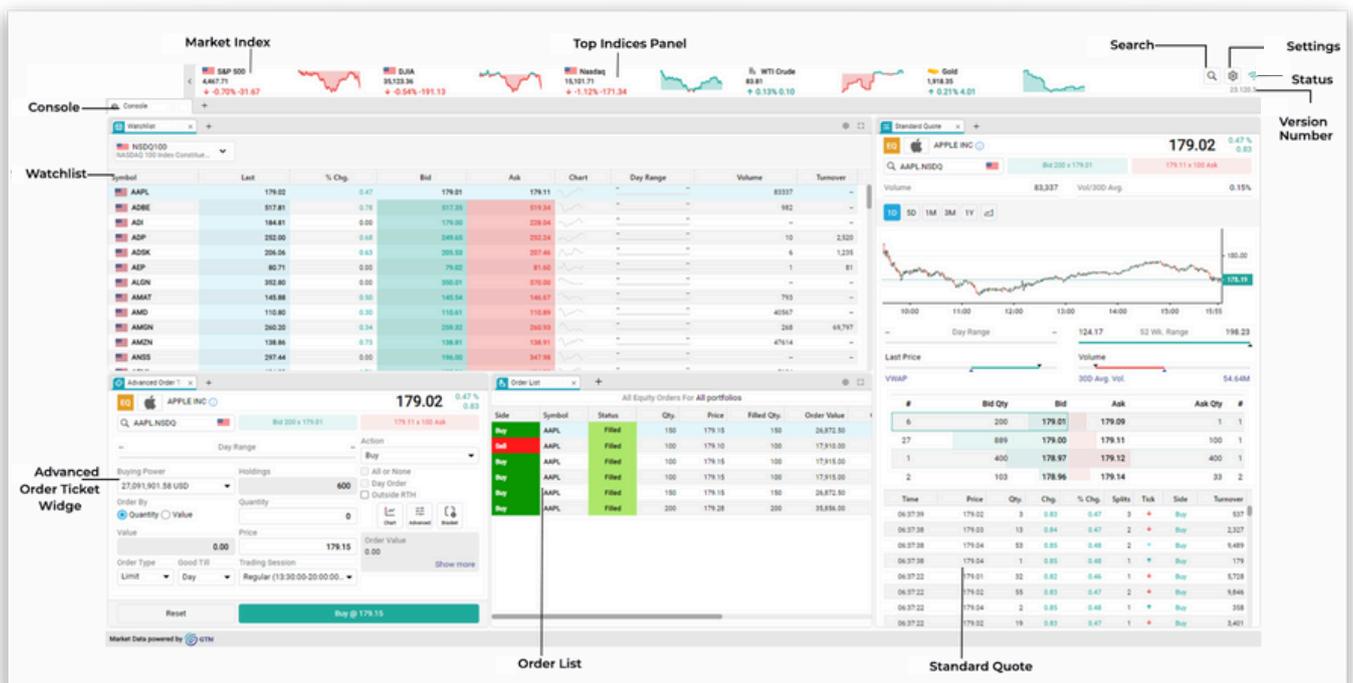


6 Platform Overview

[Table of Contents](#) 

6.1 Console

When you're just starting out, it's important to familiarise yourself with the Console. This screen will greet you as you log into the platform. You can find the labels for the different components of the Console below:



6 Platform Overview

[Table of Contents](#) >

6.2 Workspaces

Accessing Preset Workspaces

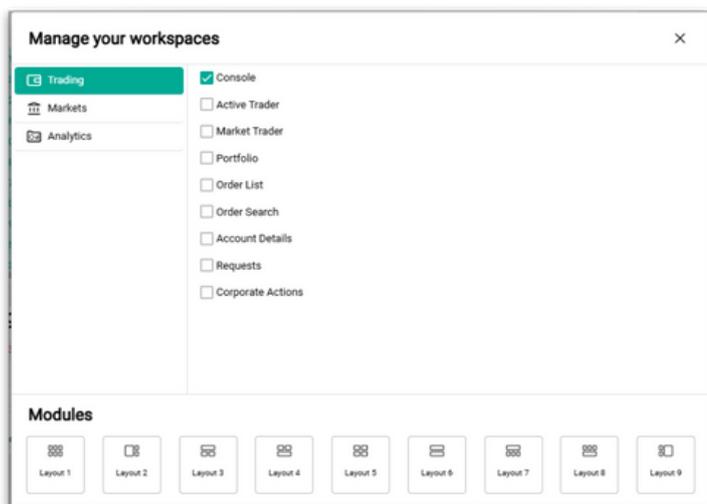
Step 1

Click or tap on the + icon beside the Console at the top left section of your screen.



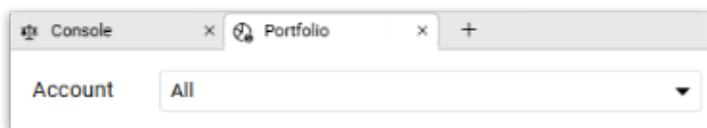
Step 2

You may choose from the preset workspaces based on your preference.



Step 3

Once selected, the workspace will be added as an additional tab.



Step 4

To close a workspace, click or tap on X.

6 Platform Overview

[Table of Contents](#) >

6.3 Custom Workspaces

With custom workspaces, you're able to fully customise the layout of your workspace according to your preferences.

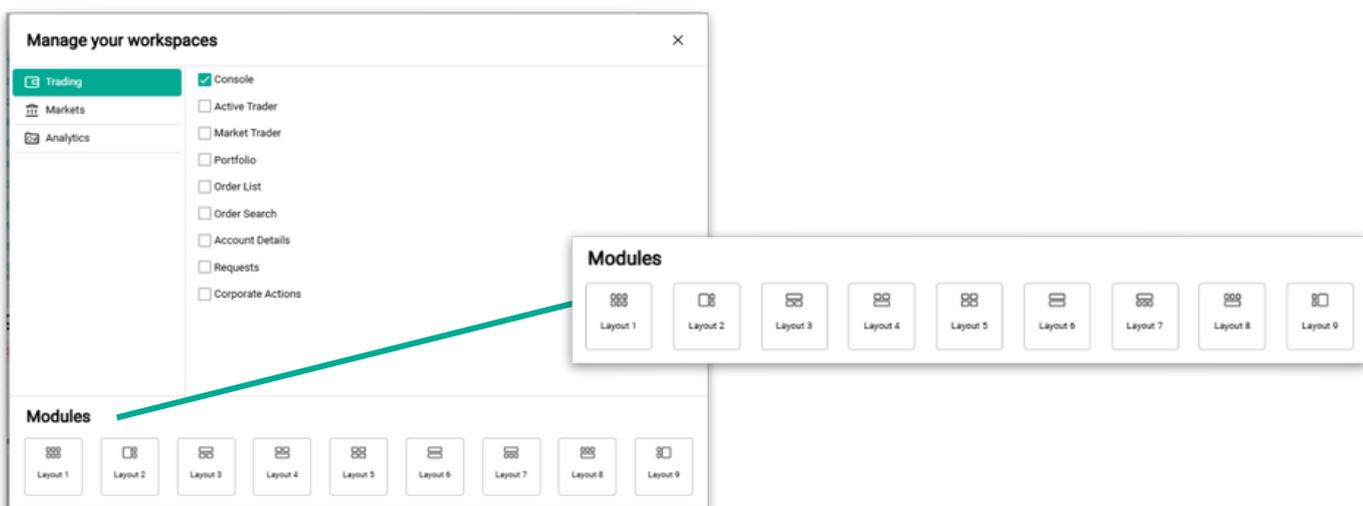
Step 1

Click the + icon beside the Console at the top left section of your screen.



Step 2

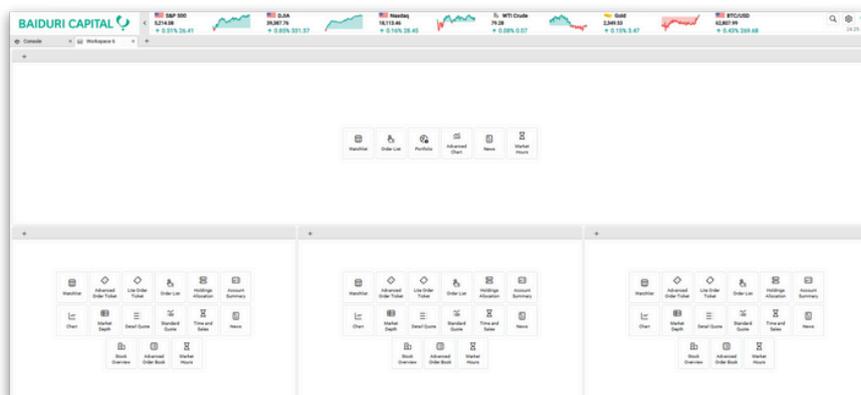
Look at the bottom section labelled **Modules**. Here, you're able to select your preferred layout for your workspace.



Step 3

After selecting a layout, a new workspace tab will open for you to choose your preferred widgets.

Each widget will be automatically placed in your desired slot once selected.



6 Platform Overview

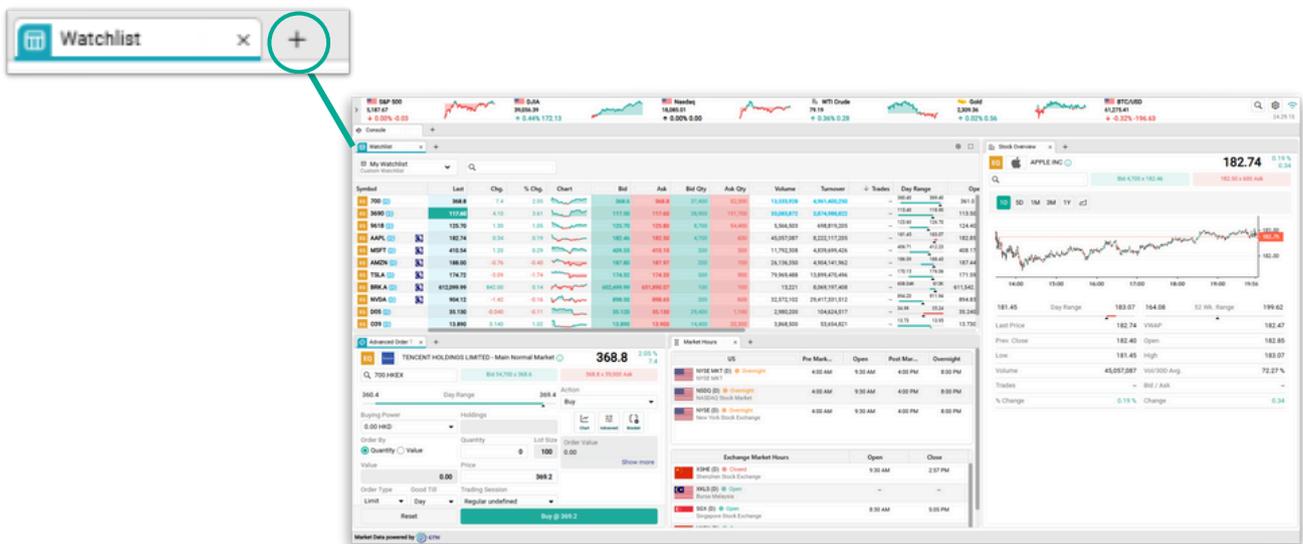
[Table of Contents](#) ➔

6.4 Adding/Removing Widgets

Widgets in your layout can be customised. You can add a new widget or remove one from your workspace layout.

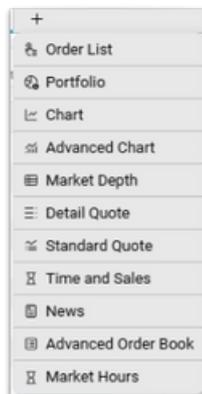
Step 1

Choose the section of your workspace where you'd like to add a widget, and select the + icon next to your currently open widget.



Step 2

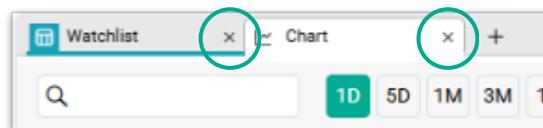
From the dropdown menu, select the widget you would like to add.



Step 3

Once selected, the new widget will be added as a separate tab according to your selected layout.

To remove a widget, simply click X.



7 Placing Orders (Buy/Sell)

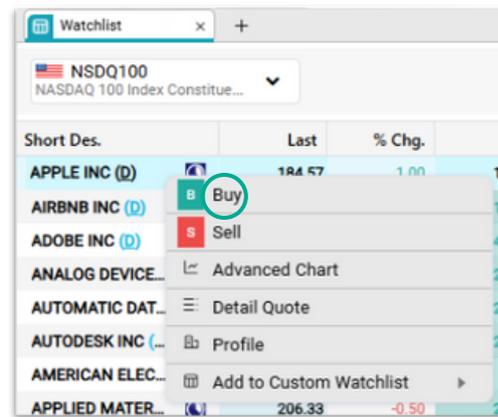
[Table of Contents](#) >

7.1 Placing orders via Watchlist

Watchlist is a widget that allows you to create a customisable list of counters that you would like to monitor. Trades can also be placed directly via the Watchlist.

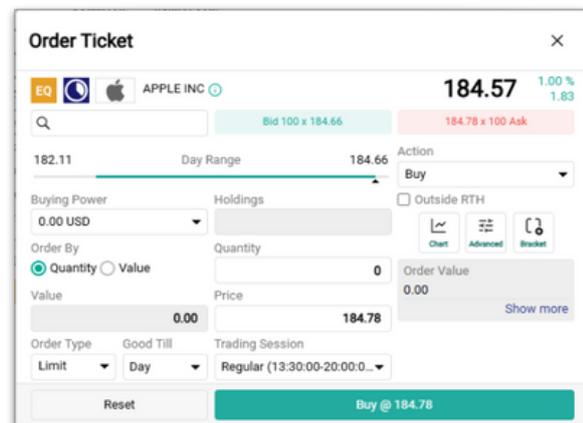
Step 1

Choose the symbol you would like to trade, right click on it, and select either **Buy** or **Sell**. For this example, we'll proceed to Buy.



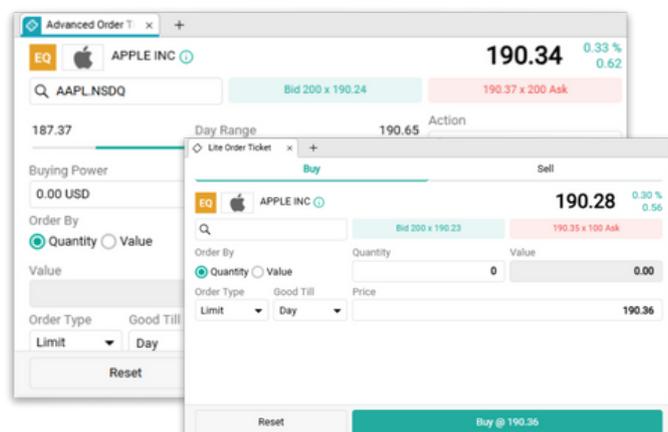
Step 2

Fill in your Order Ticket and, in this case, proceed to click or tap on **Buy** at the specified price to place your trade.



Step 3

If you're using Watchlist on Console, you can click or tap on the counter on your Watchlist to automatically load it onto the **Lite Order Ticket** or **Advanced Order Ticket** widget.



7 Placing Orders (Buy/Sell)

[Table of Contents](#) 

7.2 Placing orders via Stock Profile

The Stock Profile Workspace provides an in-depth look at a stock's performance, featuring various perspectives and metrics. You can also place your trades directly here.

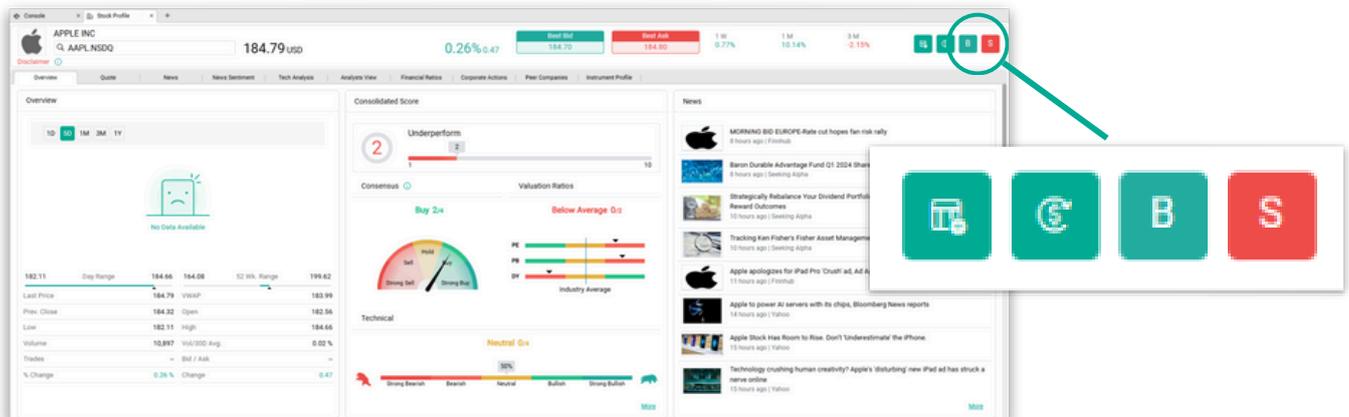
Step 1

Accessing Stock Profile

- You can access it by clicking or tapping the **+** button to manage the workspace, selecting **Analytics**, and then choosing **Stock Profile**.
- Alternatively, right-click on a symbol in the Watchlist and select **Profile**.

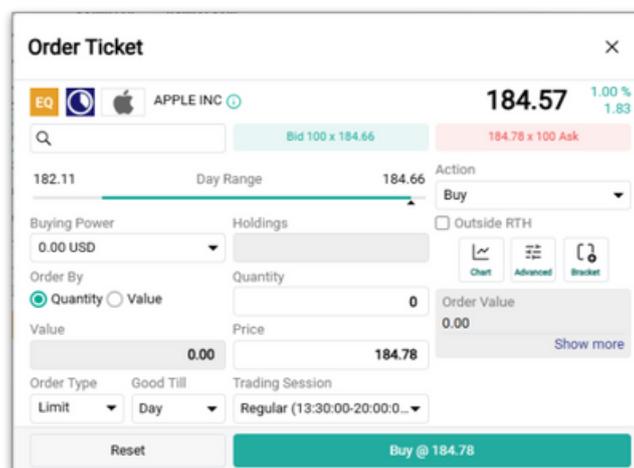
Step 2

Once you're in the Stock Profile, click or tap on either **B** for Buy or **S** for Sell at the top right section of the screen.



Step 3

Fill in your Order Ticket and, in this case, proceed to click or tap on **Buy** at the specified price to place your trade.



7 Placing Orders (Buy/Sell)

[Table of Contents](#) >

7.3 Filling in an Order Ticket

Before making an order, it's important to familiarise yourself with the Order Ticket. You can find a brief overview for the different components of the Order Ticket below:

The screenshot shows an 'Order Ticket' window for Apple Inc. (EQ). The current price is 189.84, up 0.06% from 0.12. The bid is 189.87 (100 shares) and the ask is 189.94 (300 shares). A 'Day Range' bar shows prices from 189.66 to 191.10. The 'Action' is set to 'Buy'. Callout 'a' points to the 'Buying Power' field showing 0.00 USD. Callout 'b' points to the 'Order By' section where 'Quantity' is selected. Callout 'c' points to the 'Order Type' dropdown set to 'Limit'. Callout 'd' points to the 'Trading Session' dropdown set to 'Regular (13:30:00-20:00:0...)'. The 'Price' field is set to 189.94, and the 'Order Value' is 0.00. A 'Buy @ 189.94' button is at the bottom right.

a) Indicates your available balance in the respective cash account.

b) Your order size can be based on:

- Quantity: number of shares.
- Value: specified value in the respective currency.

Note: Fractional share trading is only available for US markets. For non-US markets, order sizes will be rounded down to the nearest whole lot.

c) The main order types are:

- Market: buy or sell at the prevailing market price.
- Limit: buy or sell at the limit price or better.

d) The main Trading Session is Regular, which means your order will be active during normal trading hours of the respective exchange.

8 Recurring Subscription Plan

[Table of Contents](#) >

8.1 What is Recurring Subscription Plan?

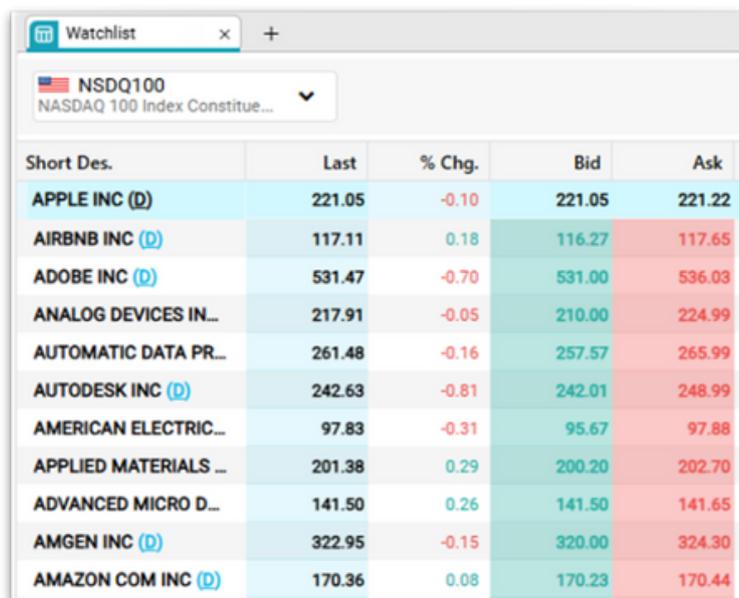
A Recurring Subscription Plan is a subscription plan that allows you to invest an equal amount of money into stocks or Exchange-Traded Funds (ETFs) of your choice at regular intervals. It benefits from an investment strategy called dollar-cost averaging, which involves making regular investments over a period of time, as opposed to a one-off lump sum investment.

Dollar-cost averaging is the practice of investing a fixed amount on a regular basis, regardless of the fluctuations in the market. By making fixed investments at regular intervals, you will be purchasing more units of the securities when prices are low and fewer units when prices are high. This consistent approach allows you to benefit from the varying prices of securities, ultimately giving you an average price over time.

8.2 How to set a Recurring Subscription Plan

Step 1

Log into your trading account and go to your watchlist.



The screenshot shows a 'Watchlist' window with a dropdown menu set to 'NSDQ100 NASDAQ 100 Index Constitue...'. Below the menu is a table with the following columns: Short Des., Last, % Chg., Bid, and Ask. The table lists several stocks with their respective values.

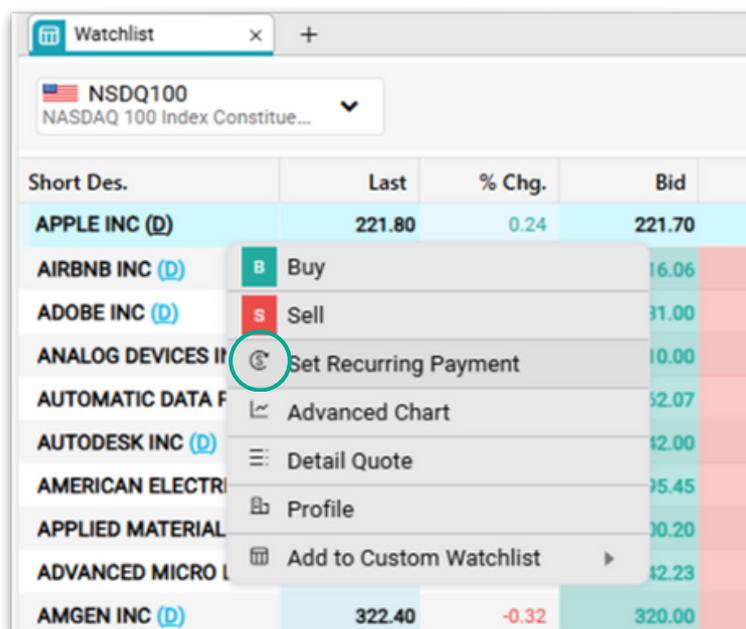
Short Des.	Last	% Chg.	Bid	Ask
APPLE INC (D)	221.05	-0.10	221.05	221.22
AIRBNB INC (D)	117.11	0.18	116.27	117.65
ADOBE INC (D)	531.47	-0.70	531.00	536.03
ANALOG DEVICES IN...	217.91	-0.05	210.00	224.99
AUTOMATIC DATA PR...	261.48	-0.16	257.57	265.99
AUTODESK INC (D)	242.63	-0.81	242.01	248.99
AMERICAN ELECTRIC...	97.83	-0.31	95.67	97.88
APPLIED MATERIALS ...	201.38	0.29	200.20	202.70
ADVANCED MICRO D...	141.50	0.26	141.50	141.65
AMGEN INC (D)	322.95	-0.15	320.00	324.30
AMAZON COM INC (D)	170.36	0.08	170.23	170.44

8 Recurring Subscription Plan

[Table of Contents](#) >

Step 2

Right click on your selected Stock/ETF and click on **Set Recurring Payment**.

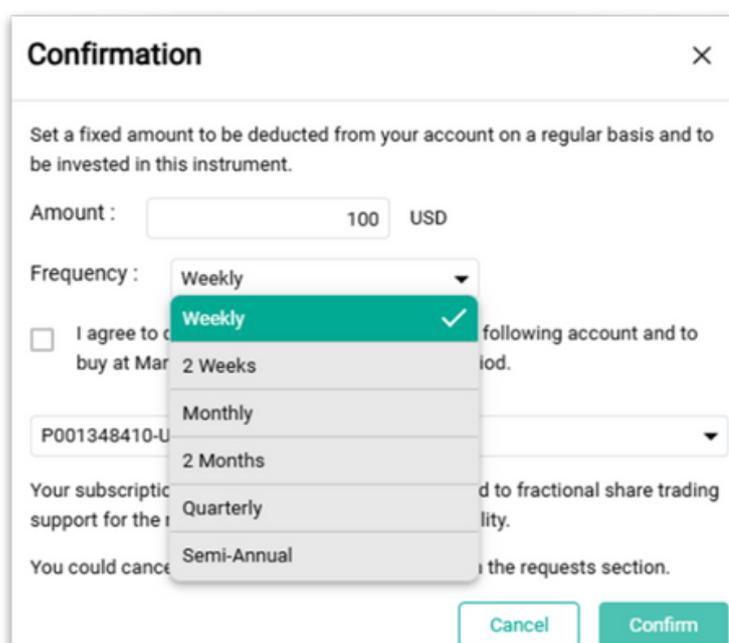


Step 3

Enter your **preferred amount** and the **frequency** of your recurring payment.

Step 4

Check to **agree**, ensure you've selected your trading account, and click **confirm**.



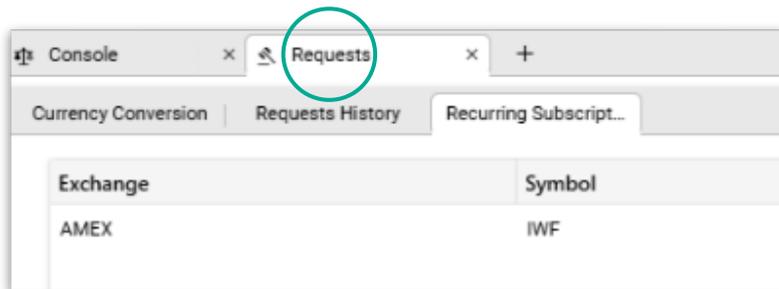
8 Recurring Subscription Plan

[Table of Contents](#) >

8.3 How to cancel a Recurring Subscription Plan

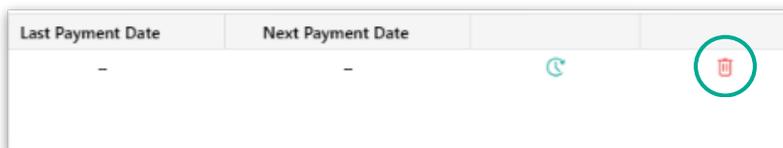
Step 1

Go to the **Request** section and select the **Recurring Subscription** tab.



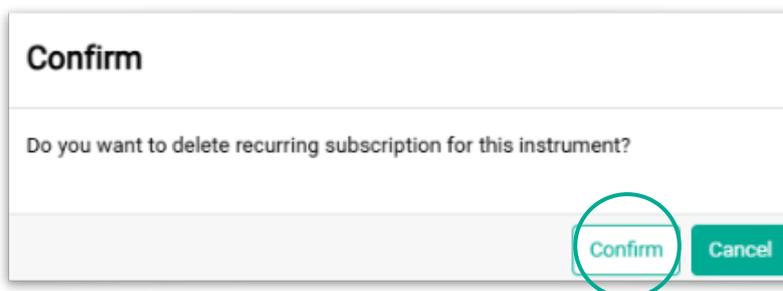
Step 2

Click the **icon** shown.



Step 3

Click **confirm** to cancel.



9 Order Management

[Table of Contents](#) >

9.1 View active order

To monitor or view your active orders, follow these steps:

Step 1

Click or tap on the + icon beside the Console at the top left section of your screen.



Step 2

Select **Order List**.



Step 3

A new tab should open that lists your currently active orders.



Order No	Exchange	Symbol	Status	Type	Side	Price	Filled Qty	Qty	Order Value	Date	Stop Price	Commission	WFO	Original Order No	Trade Session
221281000001	MEMQ	AAPL	Filled	Limit	Buy	148.12	2	2	296.24	2011-2022 09:14	0.00	8.06	0.00	-	REG
221281000002	MEMQ	AAPL	Filled	Limit	Buy	148.12	1	1	148.12	2011-2022 09:13	0.00	8.03	0.00	-	REG

9 Order Management

[Table of Contents](#) >

9.2 Amend or Cancel an order

To amend or cancel an active order, follow these steps:

Step 1

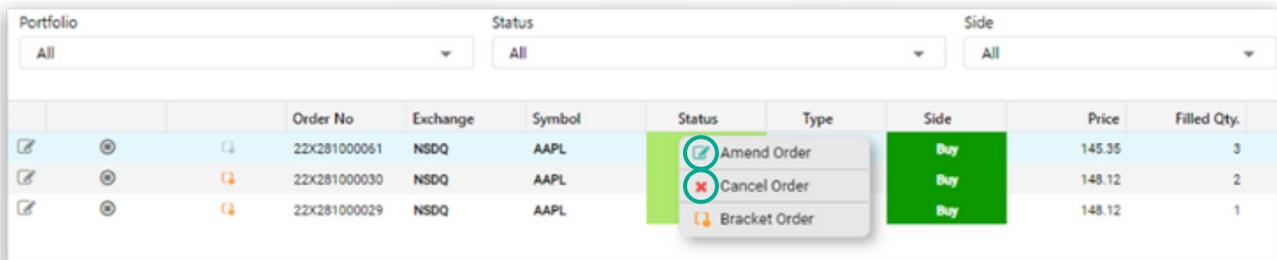
In your Order List workspace, find the order that you'd like to amend or cancel.



Order No	Exchange	Symbol	Status	Type	Side	Price	Filled Qty	Qty	Order Value	Date	Stop Price	Commission	Wf	Original Order No	Trade Session
22X281000010	NSDQ	AAPL	Filled	Limit	Buy	148.12	2	2	296.24	2011-2012 03 14		0.00	0.00	-	REG
22X281000029	NSDQ	AAPL	Filled	Limit	Buy	148.12	1	1	148.12	2011-2012 03 13		0.00	0.00	-	REG

Step 2

Once located, right-click on the order and choose either **Amend Order** or **Cancel Order**.



Order No	Exchange	Symbol	Status	Type	Side	Price	Filled Qty
22X281000061	NSDQ	AAPL	Open	Limit	Buy	145.35	3
22X281000030	NSDQ	AAPL	Open	Limit	Buy	148.12	2
22X281000029	NSDQ	AAPL	Open	Limit	Buy	148.12	1

Context menu options:

- Amend Order
- Cancel Order
- Bracket Order

9 Order Management

[Table of Contents](#) 

9.3 View historical orders

To view orders that you have placed in the past, follow these steps:

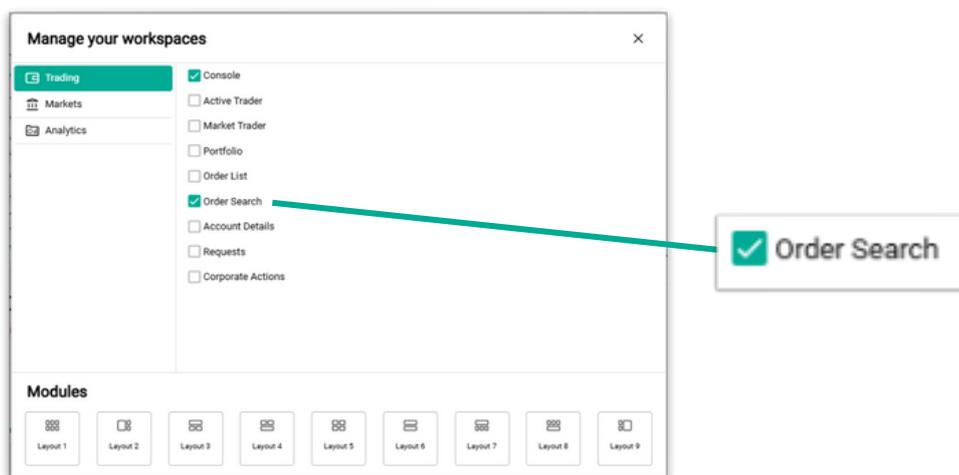
Step 1

Click or tap on the **+** icon beside the Console at the top left section of your screen.



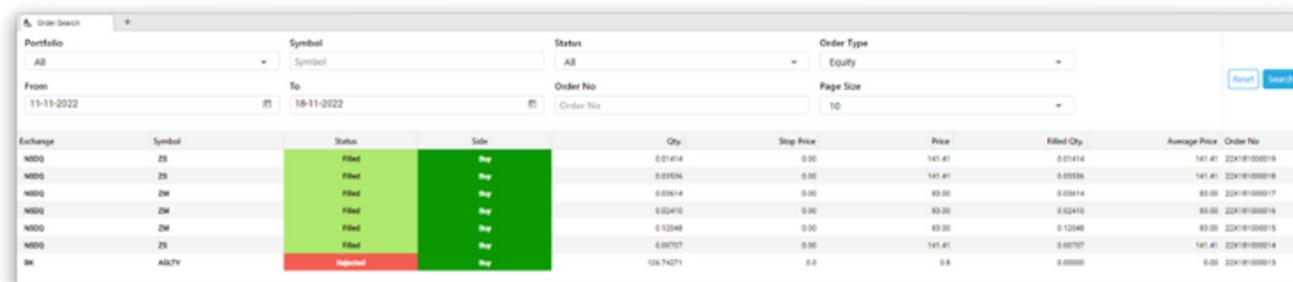
Step 2

Select **Order Search**.



Step 3

Set your desired filters for your search, such as specifying the Symbol or Status. Once you've adjusted them to your satisfaction, click **Search** and your filtered results will show.



Exchange	Symbol	Status	Side	Qty	Stop Price	Price	Filled Qty	Average Price	Order No
NDD	ZS	Filled	Buy	0.01414	0.00	141.41	0.01414	141.41	224181-000019
NDD	ZS	Filled	Buy	0.00026	0.00	141.41	0.00026	141.41	224181-000018
NDD	ZW	Filled	Buy	0.00014	0.00	83.00	0.00014	83.00	224181-000017
NDD	ZW	Filled	Buy	0.00410	0.00	83.00	0.00410	83.00	224181-000016
NDD	ZW	Filled	Buy	0.12048	0.00	83.00	0.12048	83.00	224181-000015
NDD	ZS	Filled	Buy	0.00707	0.00	141.41	0.00707	141.41	224181-000014
BK	ABTV	Rejected	Buy	104.74271	0.0	0.0	0.00000	0.00	224181-000013

10 Viewing your portfolio

[Table of Contents](#) ➔

How to view your portfolio

Detailed information on your overall portfolio or holdings, which includes profit and loss, holding statements, order history, trade history, and cash dividends, can be found by following these steps:

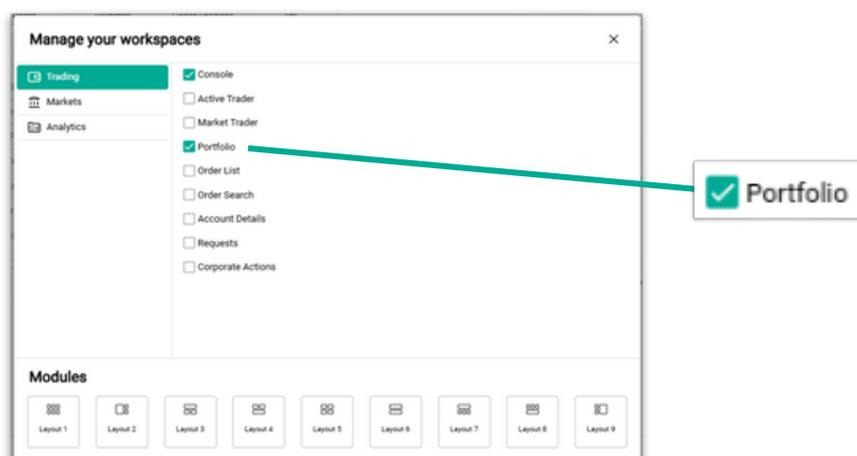
Step 1

Click or tap on the + icon beside the Console at the top left section of your screen.



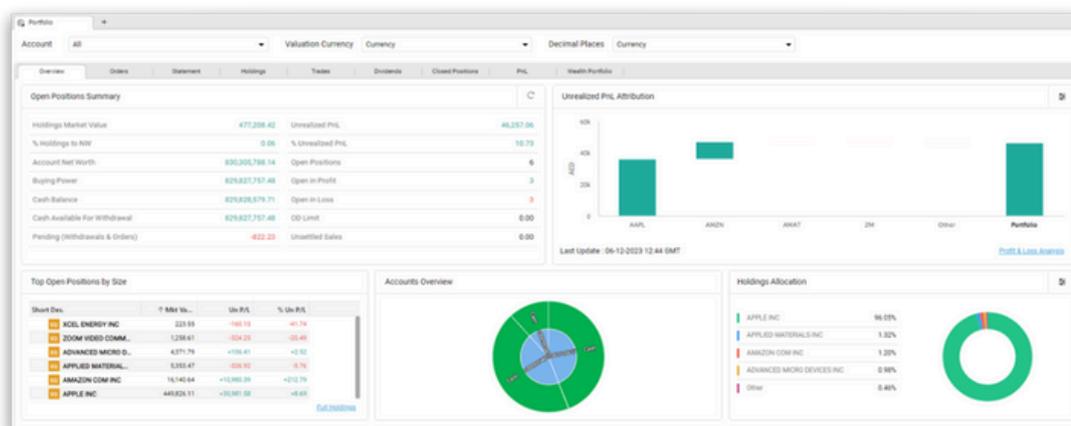
Step 2

Select **Portfolio**.



Step 3

This will open a new tab displaying all your relevant portfolio details. You can view your entire portfolio or just specific accounts. All your holdings will be converted into the specific Valuation Currency.



11 Currency Conversion

[Table of Contents](#) 

Fund multiple currency accounts

Before trading, you must ensure that you have sufficient cash balances in the currencies you wish to trade. This may require you to convert one currency to another. To convert currencies, follow these steps:

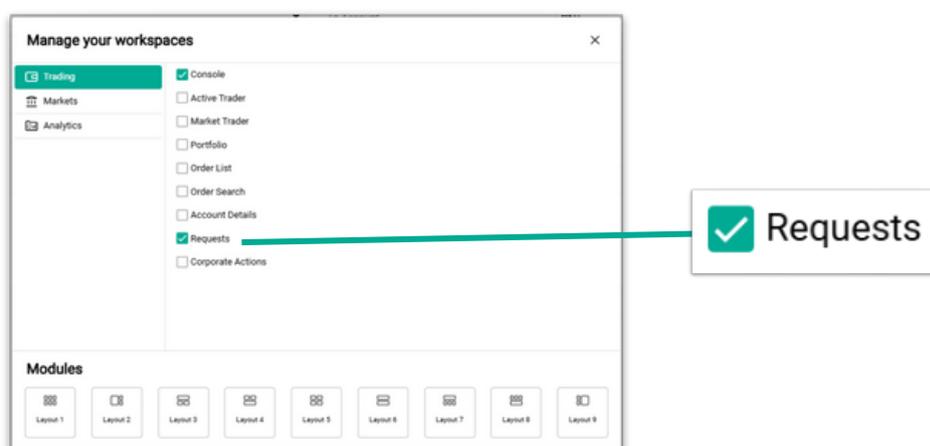
Step 1

Click or tap on the **+** icon beside the Console at the top left section of your screen.



Step 2

Select **Requests**.

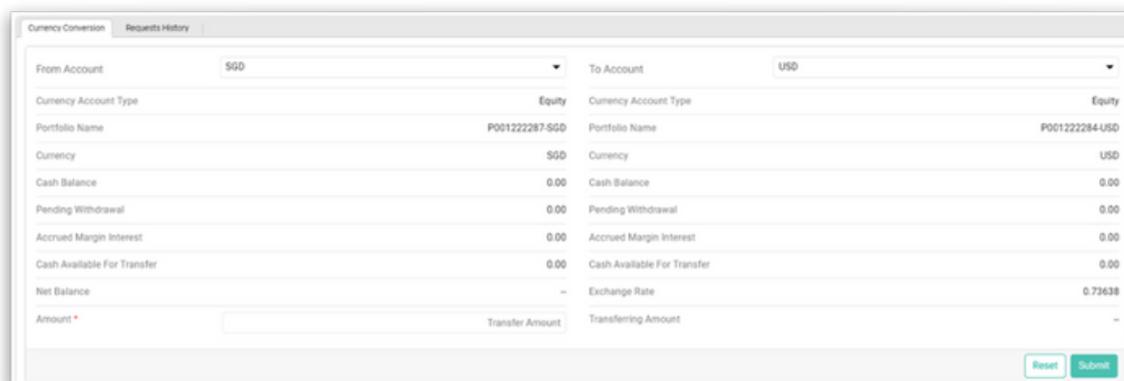


Step 3

Select the currency you'd like to fund from and convert to.

Step 4

Enter the amount to be converted, which will be denominated in the **From** currency.



From Account	SGD	To Account	USD
Currency Account Type	Equity	Currency Account Type	Equity
Portfolio Name	P001222287-SGD	Portfolio Name	P001222284-USD
Currency	SGD	Currency	USD
Cash Balance	0.00	Cash Balance	0.00
Pending Withdrawal	0.00	Pending Withdrawal	0.00
Accrued Margin Interest	0.00	Accrued Margin Interest	0.00
Cash Available For Transfer	0.00	Cash Available For Transfer	0.00
Net Balance	-	Exchange Rate	0.73638
Amount *	<input type="text"/>	Transferring Amount	-

Note: MYR conversions cannot be transacted on Baiduri Invest, as it is a restricted currency. Please reach out to Baiduri Capital for MYR conversions.

To view historical conversions, click on **Requests History** tab.

12 Learn more

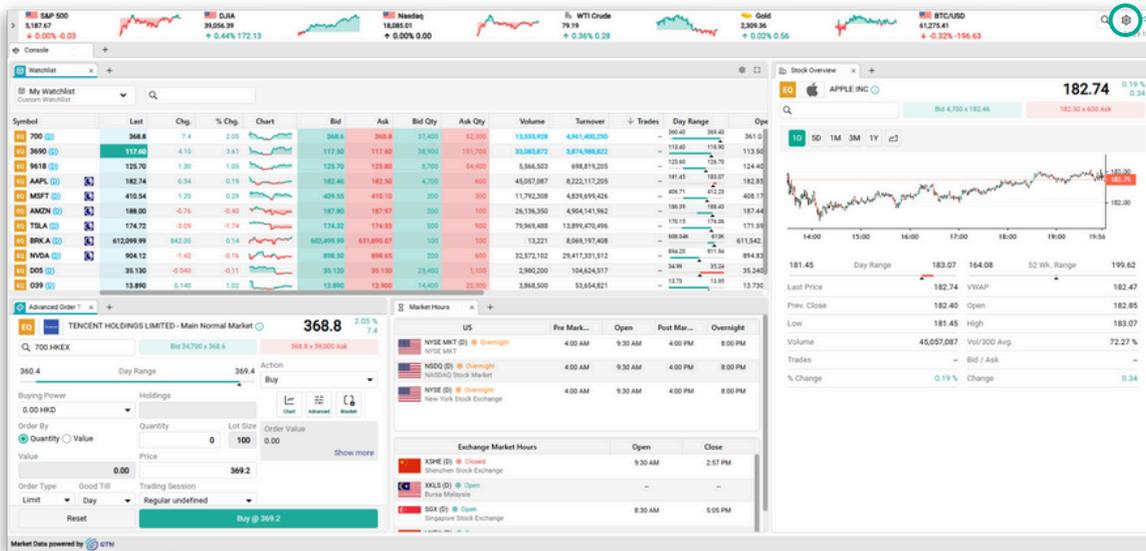
[Table of Contents](#) 

Do you need more guidance?

If you need further guidance on how to use Baiduri Invest, please follow these steps:

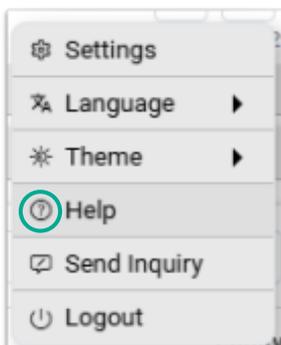
Step 1

In the platform, go to the **settings** icon at the top right of the screen.



Step 2

Click or tap on **Help** to find more guides for using Baiduri Invest. You can browse guides in the Contents section or use the Search function to find specific information.



Alternatively, you may contact Baiduri Capital for more information.

Do you need further guidance?

Let us help you.



+673 226 8588 (during business hours only)



baiduricapitalservices@baiduri.com



Monday - Friday, 9:00am - 5:00pm