

# Julius Bär

## THE NEW MARKET LINK USER INTERFACE FOR DESKTOP, TABLET AND SMART PHONE

### MARKET LINK

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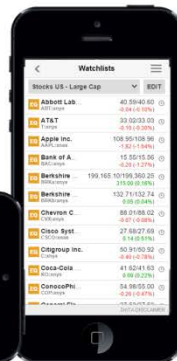
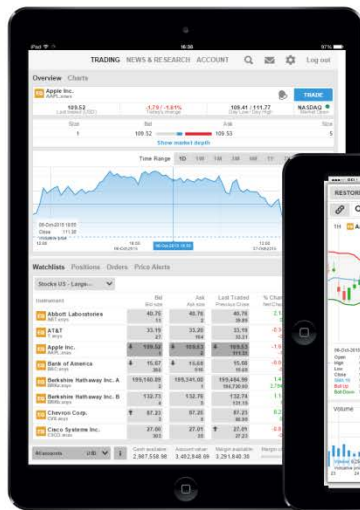
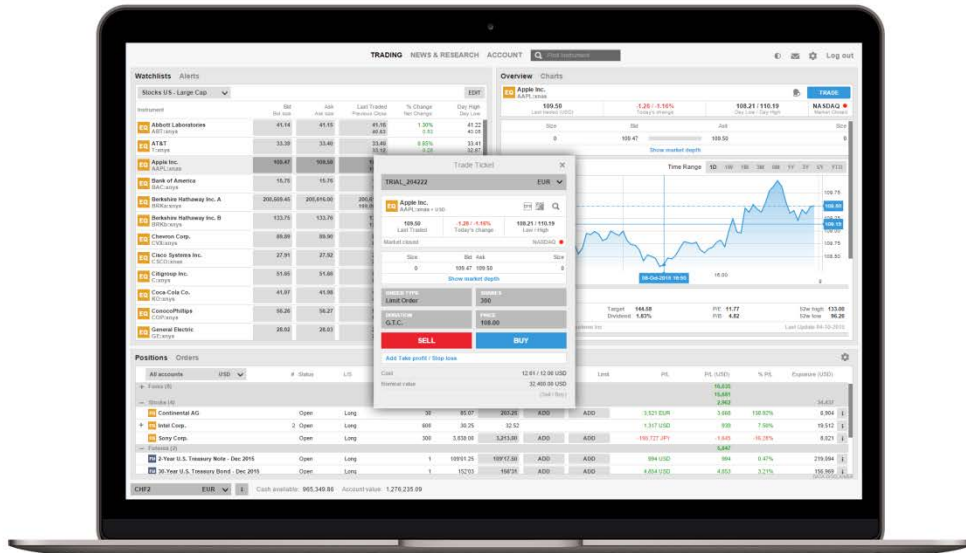
Quick start guide explaining the most important new functionalities and improvements for Market Link.

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# JULIUS BAER MARKET LINK

## QUICK START GUIDE

THE NEW MARKET LINK  
FOR DESKTOP, TABLET AND SMART PHONE



# JULIUS BAER MARKET LINK

## QUICK START GUIDE

### THE NEW MARKET LINK

#### Fast and simple

Designed to be fast and as easy-to-use as possible, the new Market Link platform from Julius Baer is a web-based trading platform that can be used from any HTML5-compatible web browser and from any device.

#### Excellent cross-device experience

Market Link offers excellent cross-device experience between desktops, tablets and Smart Phones with the user-experience very closely aligned and your watchlists and preferences follow you between devices.



The new Market Link works on almost any HTML5 supporting device and is fully synchronized.

### FIRST-TIME STARTUP EXPERIENCE

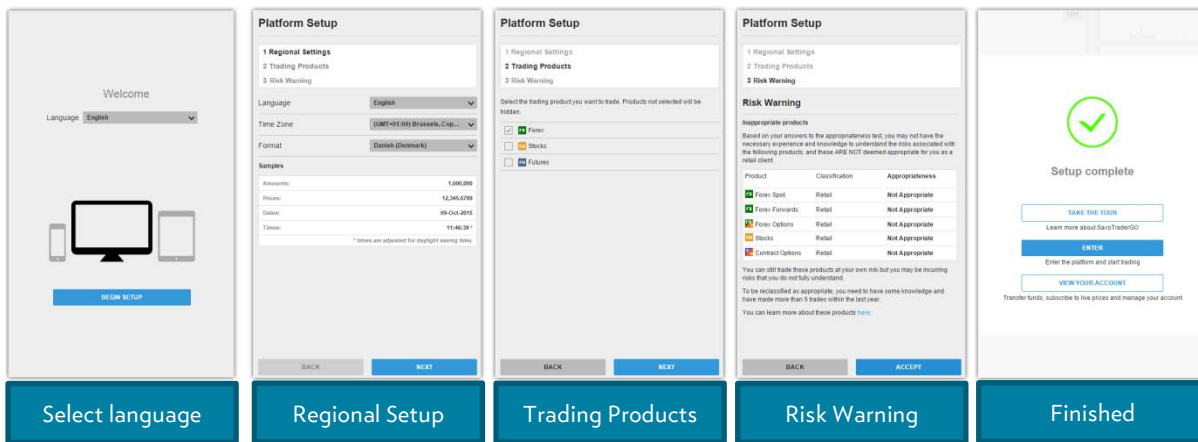
When you first enter the platform, you are guided through a few short steps to set your platform up to your requirements including:

- Regional preferences, language and number formats
- Trading product and regional preferences – used to build watchlists of the most popular instruments for your selected region to get you started.

**Note:** Products not selected will be hidden to simplify the platform. You can enable these trading products under Trading Products from the platform menu.

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Select language

Regional Setup

Trading Products

Risk Warning

Finished

These settings can be changed any time using the Platform Settings available from the menu. ☰

### TRADER ON THE DESKTOP

Using Market Link via a desktop PC offers you the full functionality and flexibility. The trading workspace of the platform is divided into three main working areas which are described in detail in the following chapters.

#### Menu Bar

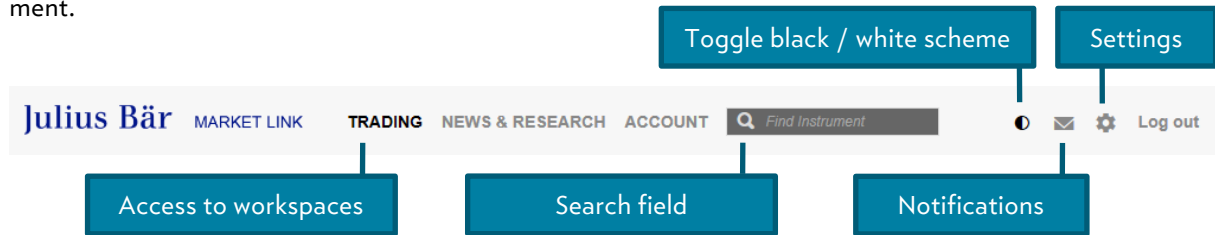
#### Account Bar

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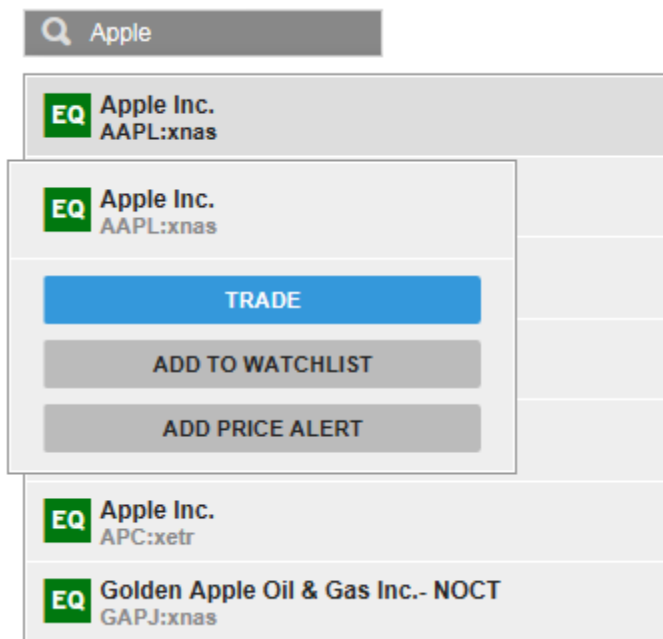
## QUICK START GUIDE

### MENU BAR

The menu bar appears always at the top of the platform and offers access to the different workspaces Trading, News & Research and the Account Services. The search function can be used to find any instrument.



The search field offers instant search results which are constantly updated and refined while you are typing. The product icon prior the instrument name indicates the instrument type. By clicking this icon additional functions are available.



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## QUICK START GUIDE

### ACCOUNT BAR

The Account Bar displays your balances available for new cash or margin positions including your total account value and the current margin utilisation. Clicking the Info-Button next to the account dropdown shows additional information.

The screenshot displays the 'Account details' window, which is a modal overlay on top of the Account Bar. The window is titled 'Account details' and has a close button (X) in the top right corner. It shows a dropdown menu for 'All accounts' set to 'USD'. Below this, there are three sections: 'Cash and positions', 'Margin', and 'Exposure'. Each section contains a list of items with their corresponding values. The 'Cash and positions' section includes 'Cash balance' (3,015,099.07), 'Transactions not booked' (-124,517.19), 'Cash available' (2,890,581.88), 'Market value, cash positions' (527,616.93), 'P/L, margin positions' (34,272.04), and 'Cost to close' (-493.69). The 'Margin' section includes 'Not available as margin collateral' (-115,892.56), 'Reserved for margin positions' (-39,773.49), 'Margin available' (3,296,311.11), and 'Margin utilisation' (1.19%). The 'Exposure' section includes 'Net exposure' (1,544,259.49) and 'Exposure coverage' (216.03%).

Account details	
All accounts	USD
<b>Cash and positions</b>	
Cash balance	3,015,099.07
Transactions not booked	-124,517.19
<b>Cash available</b>	<b>2,890,581.88</b>
Market value, cash positions	527,616.93
P/L, margin positions	34,272.04
Cost to close	-493.69
<b>Value of positions</b>	<b>561,395.28</b>
<b>Account value</b>	<b>3,451,977.16</b>
<b>Margin</b>	
Not available as margin collateral	-115,892.56
Reserved for margin positions	-39,773.49
<b>Margin available</b>	<b>3,296,311.11</b>
<b>Margin utilisation</b>	<b>1.19%</b>
<b>Exposure</b>	
Net exposure	1,544,259.49
Exposure coverage	216.03%

Account Bar Summary: All accounts USD | Cash available: 2,890,421.72 | Account value: 3,451,641.41 | Margin available: 3,296,007.54 | Margin utilisation: 1.19%

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### WATCHLISTS

The watchlist is where you monitor instruments you are interested in. You can choose from a wide variety of pre-defined watchlists or just create your own individual watchlists.

#### Watchlist selector

The watchlist selector allows you to access your own overview and access predefined watchlists for instruments you enabled on your platform during start up.

The screenshot shows the 'Watchlists' interface. At the top, there are tabs for 'Watchlists' and 'Alerts'. Below this, a dropdown menu shows 'Stocks US - Large Cap' with an 'EDIT' button to its right. A 'Select Watchlist' dialog is open, displaying two columns: 'My Watchlists' and 'Standard Watchlists'. The 'My Watchlists' column includes 'My Forex', 'Stocks Com', 'Stocks UK', 'Forex', 'Indices', and '+ New List'. The 'Standard Watchlists' column includes 'Forex', 'Futures region', 'Futures mid-cap', 'Commodities', 'Indices', 'ETFs', 'Stocks by region', 'Futures', and 'Recent'. The 'Recent' section lists 'Forex', 'Stocks US - Large Cap', and 'Futures Asian'. A second dialog, 'Stocks by region', is also open, showing a list of regions such as 'Stocks Asian', 'Stocks Australia', 'Stocks Austria', 'Stocks Belgium', 'Stocks Brazil ADR', 'Stocks Canada', 'Stocks Czech', 'Stocks Denmark', 'Stocks European', 'Stocks Finland', 'Stocks France', 'Stocks Germany', 'Stocks Greece', 'Stocks Hong Kong', 'Stocks Italy 40', 'Stocks Japan', 'Stocks Middle East', 'Stocks Netherlands', 'Stocks Nordic', and 'Stocks Norway'. Callout boxes with arrows point to various elements: 'Edit Watchlist' points to the 'EDIT' button; 'Watchlist selector' points to the 'Select Watchlist' dialog; 'My Watchlists' points to the 'My Watchlists' section; 'New Watchlist' points to the '+ New List' button; 'Standard Watchlist' points to the 'Stocks by region' option; and 'Recent Watchlists' points to the 'Recent' section.

**Edit Watchlist**  
Adding new instruments and customizing layout and appearance of the current watchlist

**Watchlist selector**  
Quickly select a customized or standard watchlists

**My Watchlists**  
Shows your customized watchlists

**New Watchlist**  
Creates a new (empty) watchlist

**Standard Watchlist**  
Select pre-defined watchlists for an exchange or region

**Recent Watchlists**  
Recently selected standard watchlists



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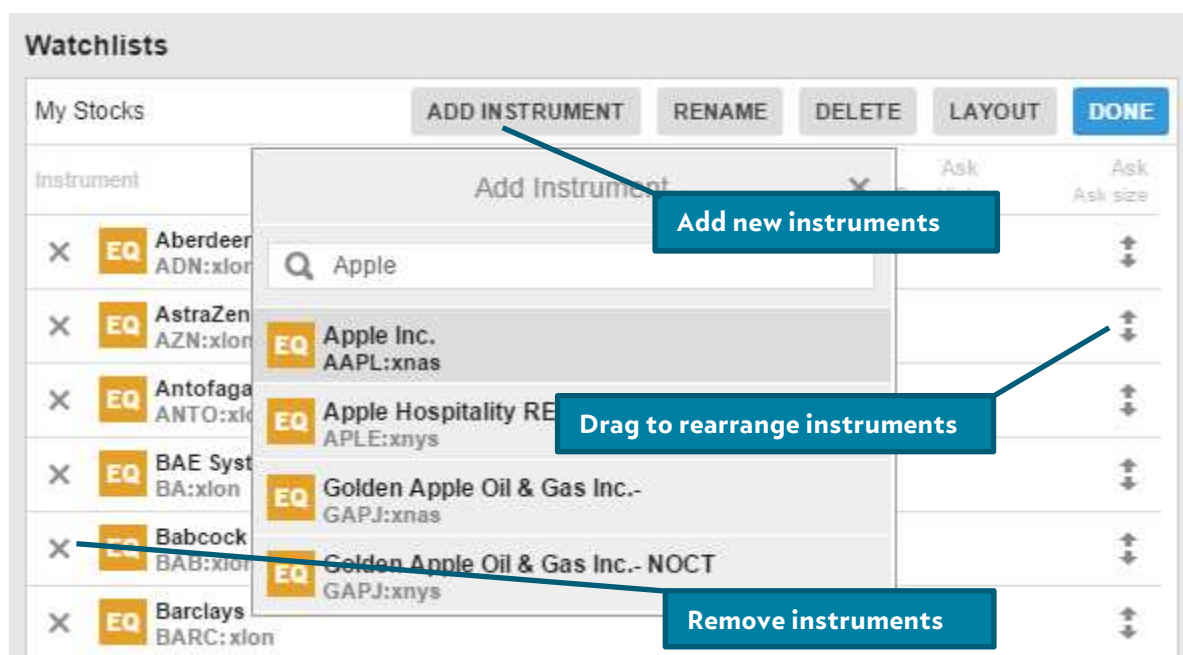
## QUICK START GUIDE

### Custom watchlists

You can make a copy of a predefined watchlist, edit it and select **COPY TO MY WATCHLISTS** or start with an empty list by selecting **NEW LIST** from the watchlist Selector.

### Editing a watchlist

Select **EDIT** to modify an existing watchlist, add new instruments by using the **ADD INSTRUMENT** button and rearrange the instruments by dragging the arrow. Instruments can be deleted from the list by clicking the delete (X) icon.

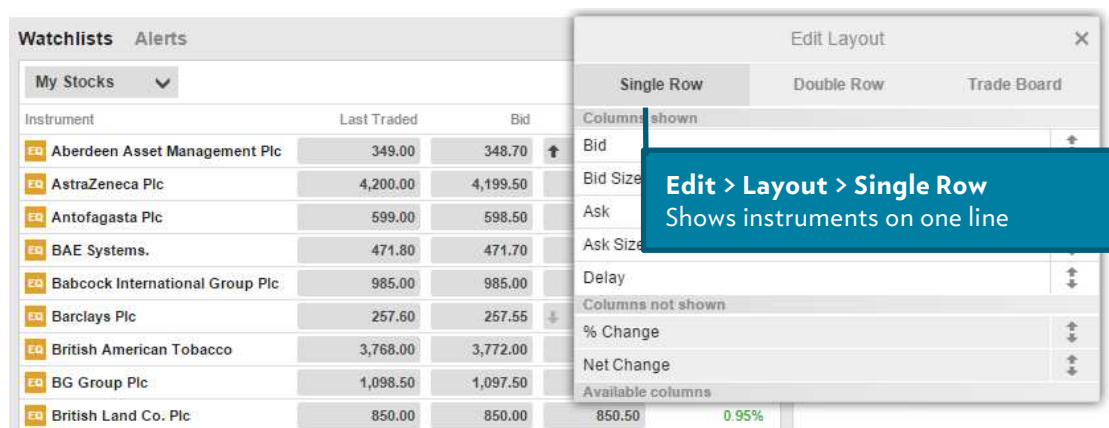


### Watchlist layout

When in **EDIT**, click **LAYOUT** to change the watchlist appearance. The following three modes are available.

### Single Row list

**Single Row** mode allows you to show most instruments and is only available on desktop PCs.





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## QUICK START GUIDE

### Double Row list

**Double Row** allows more information to be displayed for instruments in a limited screen area.

The screenshot shows a watchlist titled 'My Stocks' with columns for Instrument, Bid Size, Ask Size, Bid, and Day Low. The watchlist contains several entries, including Aberdeen Asset Management Plc, AstraZeneca Plc, Antofagasta Plc, BAE Systems, Babcock International Group Plc, and Barclays Plc. An 'Edit Layout' dialog box is open, showing three tabs: 'Single Row', 'Double Row', and 'Trade Board'. The 'Double Row' tab is selected, and a blue callout box points to it with the text: 'Edit > Layout > Double Row Shows instruments on two lines'.

### Trade Board

**Trade Board** mode allows you to trade instruments quickly using either double-click or single-click mode. This mode can be set using the platform settings.

The screenshot shows a watchlist titled 'Forex Majors' with columns for Instrument, Bid, and Ask. The watchlist contains entries for EURUSD and XAUUSD. The EURUSD entry shows a bid of 1.0687 and an ask of 1.0690. The XAUUSD entry shows a bid of 1,071.3. An 'Edit Layout' dialog box is open, showing three tabs: 'Single Row', 'Double Row', and 'Trade Board'. The 'Trade Board' tab is selected, and a blue callout box points to it with the text: 'Edit > Layout > Trade Board Shows instruments in tile mode'.

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## QUICK START GUIDE

### Selecting columns

When in **EDIT**, click **LAYOUT** to change the columns shown in the watchlist:

**Columns shown**  
Highlighted columns will be shown in your watchlist

**Columns not shown**  
Columns that cannot be shown in the available width.

**To add columns**  
Drag from **columns available** into **columns shown**

**To remove columns**  
Drag from **columns shown** into **available columns**

The **COLUMNS SHOWN** displays the lines currently included in the watchlist. The highlighted columns are currently visible in the width the watchlist has available. To add a column to the **COLUMNS SHOWN**, drag it into the required position in the list.

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### ALERTS

The **Alert** functionality allows you to individually set alerts on your instruments. Due to bank confidentiality the alerts will only show up on the trading platform and are not sent via e-Mail or text message.

The screenshot shows the 'Alerts' section of the trading platform. On the left, a watchlist table displays an alert for Apple Inc. (AAPL:xnas) with a current price of 113.69 and a value distance of 0.00. A blue callout box over the watchlist reads: 'Add Price Alert: Allowing multiple settings for alerts including comments and expiry date'. On the right, the 'Add Price Alert' dialog box is open, showing settings for Apple Inc. (Stock AAPL:xnas). The alert type is set to 'Traded Price', the condition is '≥', and the value is '113.69'. The active status is 'On', and the repeating status is 'Off'. The expiry date is set to '25-Nov-2015'. There is a 'Comment' field and a 'SAVE' button at the bottom.

The **EDIT** mode allows you to modify different parameters and alerts can be set depending on the last traded price or the change in percent. The additional comment field allows up to 130 characters.

### TRADES AND ORDERS

#### Trade Board

The **Trade Board** is available for any instrument. The colors of the tiles will vary according to your market data subscriptions and the exchange opening hours.

The diagram illustrates the Trade Board interface for the EURUSD instrument. The main panel shows 'FX EURUSD' with a dropdown menu set to 'EUR' and an order volume of '25,000'. The interface is split into two main sections: 'SELL - EUR' with a price of '1.06 82<sup>4</sup>' and 'BUY - EUR' with a price of '1.06 85<sup>3</sup>'. A 'Current Spread' of '2.9' is shown between the two prices. Below the prices, it indicates 'LIVE prices' and 'Market open'. Callouts point to various features: 'Instrument' points to the 'FX EURUSD' label; 'Order Volume' points to the '25,000' value; 'Light Green Single-Click Trading active' points to the green background; 'Price shown is realtime' points to the 'LIVE prices' indicator; 'Opening indication' points to the 'Market open' status; 'Opens Trade Ticket' points to the '82<sup>4</sup>' price; and 'Current Spread' points to the '2.9' spread value.

The Trade Board mode allows you to execute a FX trade at the shown price with a single- or double-click. These trade modes can be set in the trading platform settings.

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The Bid and Ask in the trade board can show different colors according to the current status.

Color	Description
Light Green	Single-Click Mode: Live and tradable prices. One click will execute a trade
Dark Green	Double-Click Mode: First click will activate the instrument, second click will execute the trade
Grey	Market is closed or data is delayed
Orange	Request-for-Quote Mode: If the entered order volume exceeds certain limits, the RfQ Mode is activated. First click is sending a quote request to dealing price, second quote will execute the order if quote has been answered with a tradable price

### Watchlist

By clicking on of the price fields (Bid / Ask / Last Traded) in the watchlist, the trade ticket will open.

<b>EQ</b> Vodafone Group Plc VOD:xlon	210.85 211.95	-0.52% -1.10	7,762,019	Open LSE_SETS
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Opens Trade Ticket

### Overview panel

You can also open the trade ticket by searching and selecting instruments to open them in the overview and clicking the trade button in the header bar.

Overview		Charts	
<b>EQ</b> Vodafone Group Plc VOD:xlon	★	🔔	<b>TRADE</b>
<b>210.15</b> Last traded (GBP)	<b>-1.80 / -0.85%</b> Today's change	<b>209.20 / 211.75</b> Day Low / Day High	<b>LSE_SETS</b> ● Market Open

Opens Trade Ticket

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### Trade ticket

The trade ticket allows you to place or modify an order for the selected instrument and to add related orders to protect your position (stop-loss orders) and take profit if it reaches your target price.

The screenshot shows a 'Trade Ticket' window for Apple Inc. (AAPL) with the following details:

- Account:** 52502/031031031H, CHF (indicated by an orange warning icon).
- Instrument:** Apple Inc. (AAPL:xnas • usd).
- Price Data:** Last Traded: 117.19, Today's change: 3.50 / 3.08%, Low / High: 115.68 / 117.49.
- Market:** NASDAQ, 15 minutes delayed - 15:59:17.
- Market Depth:**

Size	Bid	Ask	Size
5	117.18	117.20	202
- Order Type:** Limit Order
- Shares:** 100
- Duration:** G.T.C.
- Price:** 117.21
- Buttons:** SELL (red), BUY (blue)
- Take Profit / Stop Loss:**
  - Limit: 125.00
  - Trailing Stop: 110.00
  - Trailing Step: ±0.25
- Cost:** 136.56 USD
- Nominal value:** 11721.00 USD
- Buttons:** Edit Take profit / Stop loss, Show more, (Sell / Buy)

Callout boxes provide the following information:

- Top Left:** Currency account can be chosen here. The orange icon indicates a difference between instrument currency (USD) and booking account currency (CHF).
- Top Right:** Details, market and price data for the chosen instrument according to the subscription of the client.
- Middle Left:** SELL or BUY will show a confirmation screen for the order. After CONFIRM your order will be sent to the market.
- Middle Right:** Order Detail modification. Available order and limit types are depending on the chosen instrument.
- Bottom Left:** Additional Take Profit and Stop Loss orders can be entered. The available limit types depend on the chosen instrument.
- Bottom Right:** Volume and Cost indication for the particular trade.

### Trade ticket FX

To trade FX within the Trade Board, select TRADE from the Order Type. Depending on the set trade mode you can now use single- or double-click trading.

The screenshot shows a 'Trade Ticket' window for EURUSD with the following details:

- Instrument:** EURUSD (FX), Euro/US Dollar.
- Status:** LIVE prices, Market open.
- TRADE/ORDER:** Trade
- Currency:** EUR, 500,000
- Price Levels:**
  - BID: 1.06, 90<sup>2</sup>
  - ASK: 1.06, 93<sup>1</sup>
  - Spread: 2.9
- Value date:** Spot Date (20-Nov-2015)
- Buttons:** Add Take profit / Stop loss
- Cost:** 0 / 0 USD
- Margin impact:** 44,501.01 / 43,385.54 CHF

Callout boxes provide the following information:

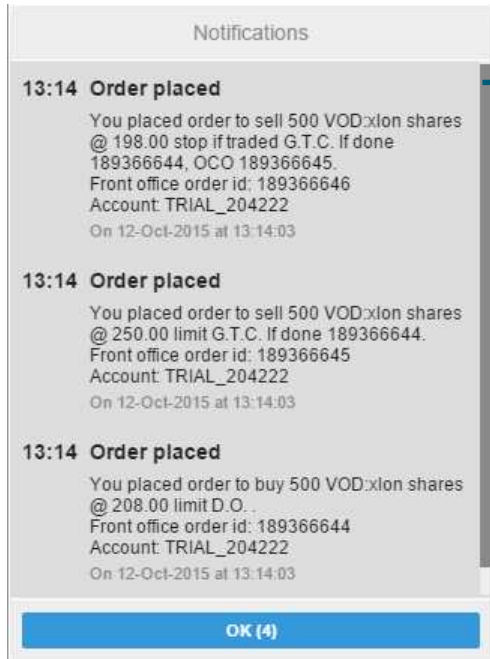
- Left:** Click on BID or ASK will activate the currency pair. Second click will execute the trade at the current price level.
- Right (Top):** Value Date for SPOT and FORWARD Trades depending on chosen currency pair.
- Right (Bottom):** Margin indication for the set volume.

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### Trade and order confirmations

All trades and orders will be confirmed immediately after being placed in the Notifications Area.



The screenshot shows a 'Notifications' window with three entries, each starting with '13:14 Order placed'. The first entry is for selling 500 VOD:xlion shares at 198.00. The second is for selling 500 VOD:xlion shares at 250.00 limit. The third is for buying 500 VOD:xlion shares at 208.00 limit. Each entry includes the front office order ID (189366644 or 189366645) and the account (TRIAL\_204222). The timestamp for all is 'On 12-Oct-2015 at 13:14:03'. At the bottom of the window is a blue button labeled 'OK (4)'.

### Trades / Orders confirmed

Trades and orders are confirmed immediately after being executed or placed.

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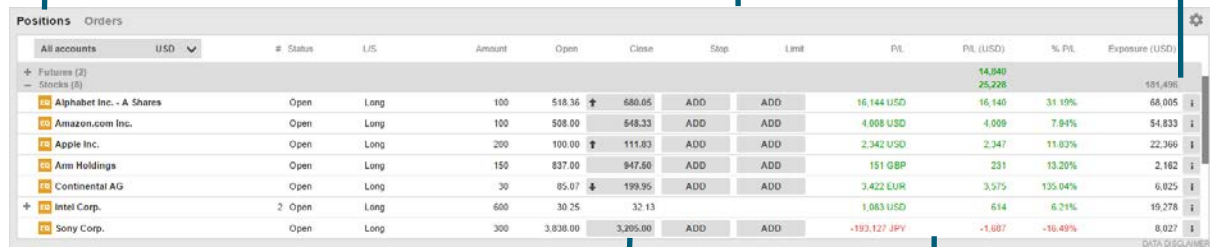
### MANAGING POSITIONS

The Position Management pane allows you to keep your open positions in focus and manage your trades.

**Open positions**  
Manage your open positions

**Orders**  
Manage stops and limits

**Full position details**



**Close positions**  
Close positions from the close column

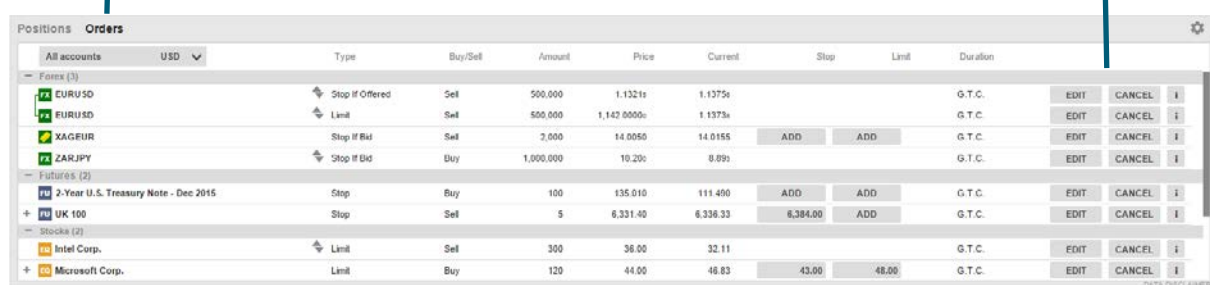
**PnL**  
Calculated in real time depending on the market data subscriptions

### MANAGING OPEN ORDERS

The Order Management pane allows you to monitor and manage your open trade orders.

**Open trade orders**  
Manage your open trade orders

**Modification order**  
Modify orders before execution





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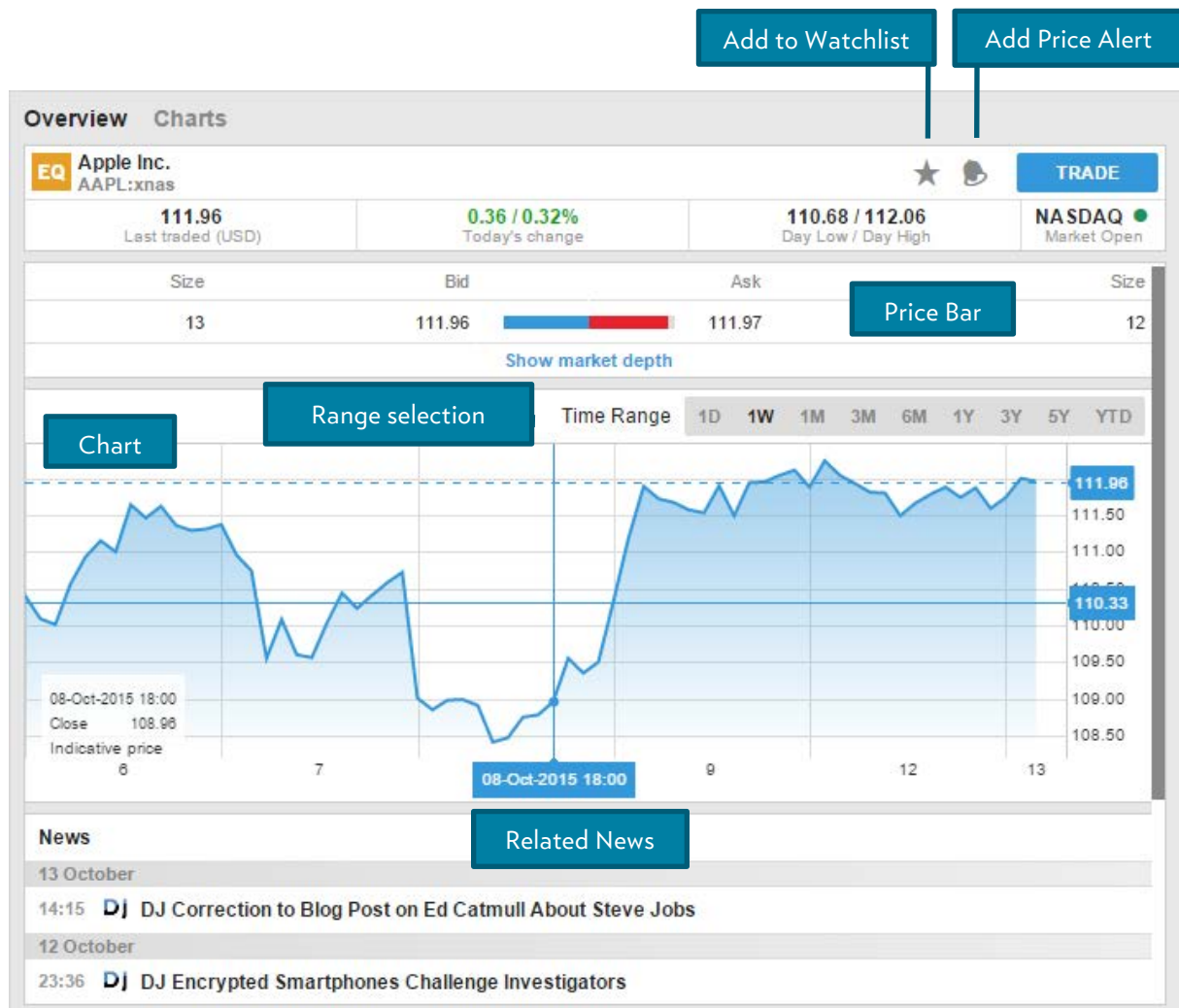
### MARKET OVERVIEW

The Market Overview panel gives an overview of price information, charts and news for instruments selected from the:

- Search field
- Watchlist
- Positions list
- Orders list

The Market Overview shows:

- Price details, including Last Traded, Bid, Ask, today's high and low and current market status
- Charts for a selected time range from 1 day to 5 years
- Related news stories



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### CHARTS

The Chart area allows up to four charts for the selected instrument with different types, time periods and studies.



### ACCOUNT SERVICES

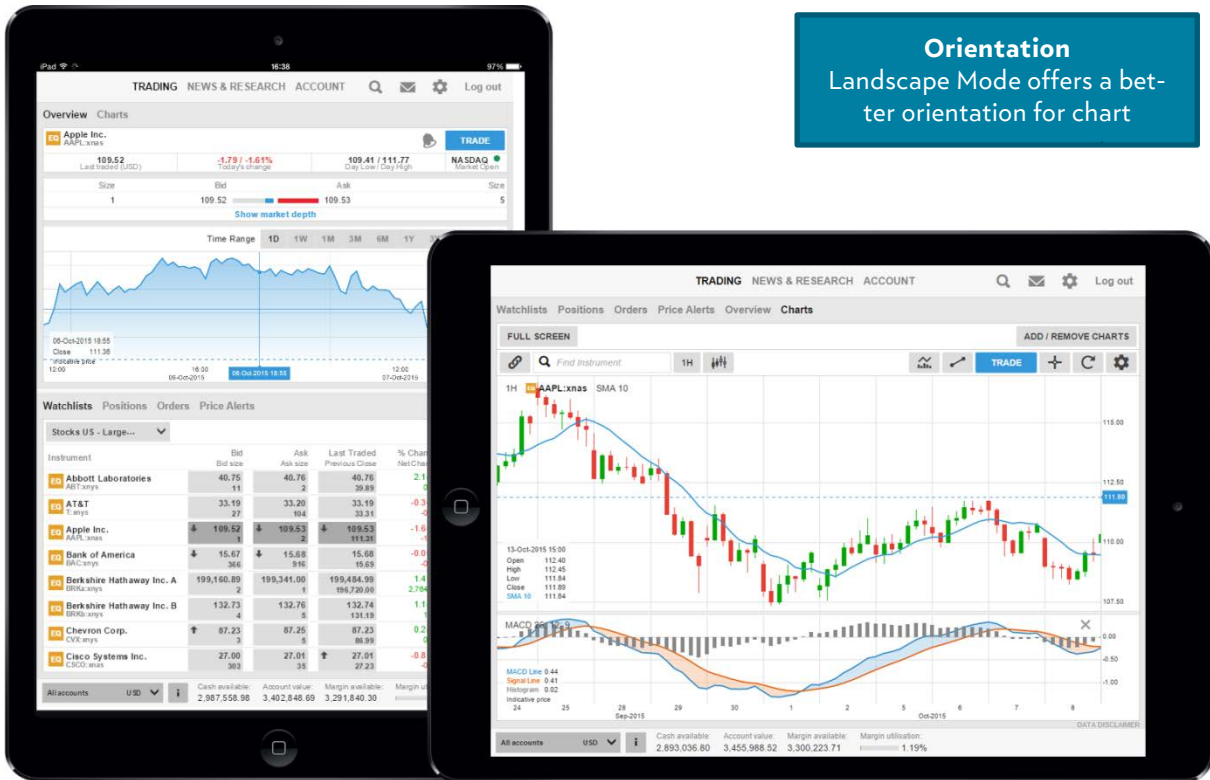
Your Account services can be accessed from the Menu Bar of the trading platform and include:

- Account overview
- Account performance
- Subscriptions management
  - managing subscriptions for exchange data and news
- Trading conditions
- Reports
  - Various statements and reports, including Trades Executed, Corporate Actions and Cash Transactions
- Activity log

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### THE NEW MARKET LINK ON TABLETS

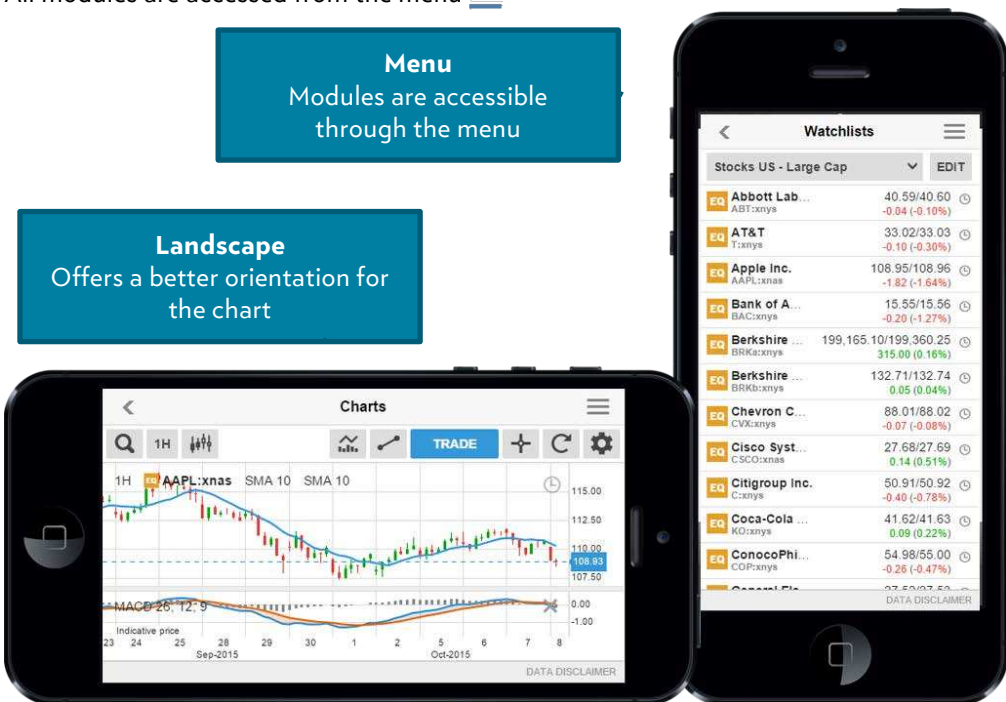


### THE NEW MARKET LINK ON SMART PHONES

All modules are accessed from the menu ☰

**Menu**  
Modules are accessible through the menu

**Landscape**  
Offers a better orientation for the chart



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### TECHNICAL REQUIREMENTS

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The Julius Baer Market Link platform has been tested and is officially supported in the following browsers on the following Operating Systems:

DEVICE TYPE	OPERATING SYSTEM	SUPPORTED BROWSERS
<b>PC</b>	Windows 7 Windows 8 Windows 10	Internet Explorer 10+ Firefox 25 Chrome
<b>MAC</b>	OSX 10.6+	Safari (newest) Chrome (newest)
<b>ChromeBook</b>	Chrome OS version 44+	Chrome
<b>Linux</b>	Linux	Chromium FireFox is not supported
<b>Tablet</b>	iPad – iOS7+ Android 4.1+ Windows 8/10*	Safari Chrome Internet Explorer 11
<b>Smartphone</b>	iPhone – iOS7+ Android 4.1+ BlackBerry10 Windows 8/10*	Safari Chrome Blackberry Browser Internet Explorer 11

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### JULIUS BAER MARKET LINK APP

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If you have an iOS or Android smartphone or Tablet, go to the App Store or Google Play and search for **Julius Baer Market Link**.

If your mobile phone does not support the Julius Baer Market Link App, please go to <https://marketlink.juliusbaer.com/Login>

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