

# 2GoTrade



# 2023

## Portal2

Browser-Based  
Trading Platform  
User Manual

by 2GoTrade Limited ver 1.0 14-Sep-2023

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## 1. Before You Start

Portal2 is a new generation of multi-functional securities trading web platform developed by 2GoTrade. In addition to securities trading, it also provides functions such as account inquiry, IPO subscription, fund deposit and withdrawal, etc. Please note the following important information:

- Depending on the Hong Kong equities and indexes license withheld by your brokerage, or the Hong Kong equities market quotation plan you are subscribing, the Hong Kong equities index and/or single security quotations in this application will be displayed in real time/delayed or hidden.
- The general system settings of your brokerage firm may also make some functions in this manual unavailable.
- Portal2 does not support running on Internet Explorer (IE). It is recommended to use the latest versions of Google Chrome, Firefox, Microsoft Edge and Safari browsers.
- Portal2 supports the use of mainstream tablets. It is recommended to use tablets with a resolution of 1024 × 768 or above to obtain the best display effect.

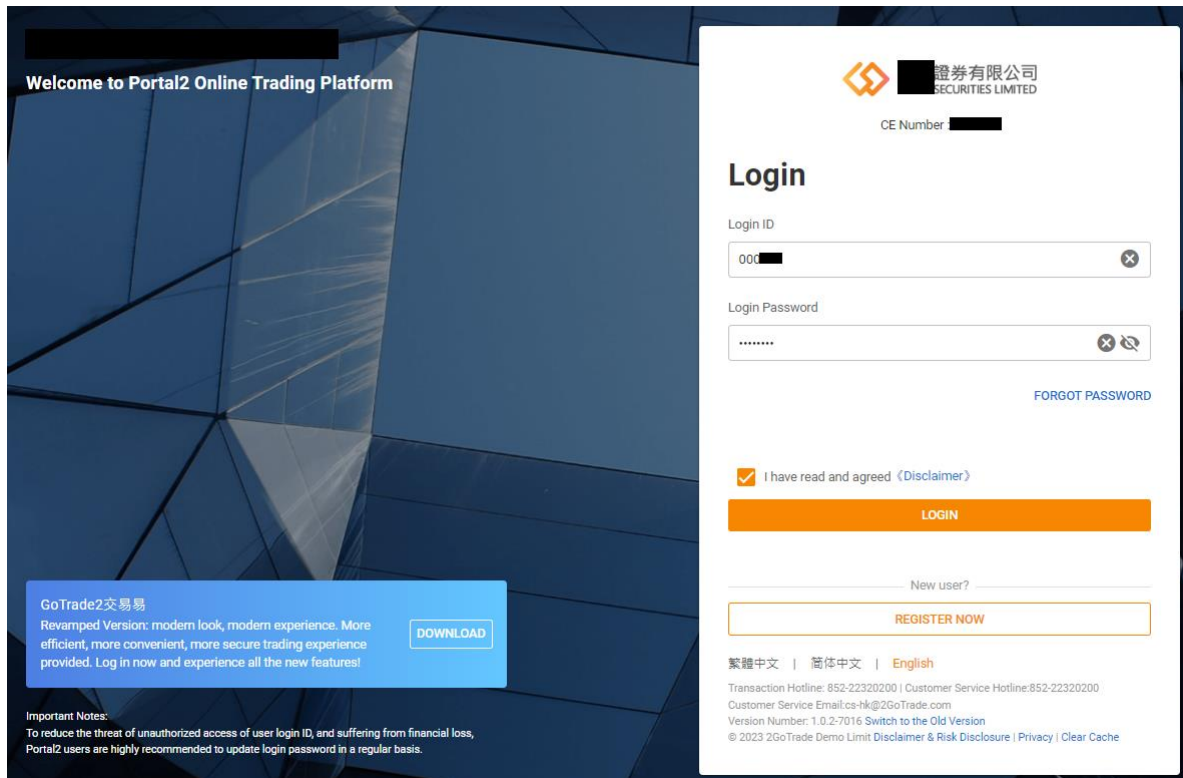
For details, please contact your brokerage or 2GoTrade technical support hotline (852) 22320300 / email to [cs-hk@2gotrade.com](mailto:cs-hk@2gotrade.com).

### Disclaimer

2GoTrade Limited has used best effort to ensure the accuracy and reliability of the information provided in this manual, but cannot guarantee its absolute accuracy and reliability, and will not be liable for any loss or damage caused by any inaccuracies or omissions.

In case of any discrepancies of meaning between Chinese and English version of this manual, Chinese version shall prevail.

## 2. Log In



- Use a browser to open the URL provided by your broker
- Enter your login ID and password, click to check "I have read and agree <disclaimer>", and then click <Login> to proceed.
- Click the language menu at bottom to switch among "Traditional Chinese", "Simplified Chinese" or "English"

### 2-Factor Authentication (2FA)

- Please select the corresponding button and press <Confirm> to choose to receive a one-time password (OTP) via SMS or mobile security code to complete the two-factor authentication (Fig. 1).
- By SMS:
  - Your registered mobile phone number will receive a SMS with six-digit OTP. Please enter it on the login page and click <OK> (Fig.2)

#### Verification code

Please select a verification method

SMS one-time password (OTP)
   
 Mobile Security Password

Tips  
The selected authentication method will be used as the default login option for the next time

Fig. 1

[< Back](#)

#### Verification code


Sent to 85-████████

Verification code

Mobile Security Password

Fig. 2

## Portal2 Browser-Based Trading Platform User Manual (ver 1.0)

- Mobile Security Key (soft token, **RECOMMENDED!**)
  - Open GoTrade2 APP on your mobile phone. Press  at bottom (Fig. 3).
  - A six-digit OTP will be generated in the APP next page (Fig.4).
  - Please enter it on Portal2 2FA page and click <OK> (Fig.5).
  - If you have not enabled this feature, please refer to left section of Fig. 5 to use the GoTrade2 APP to complete the activation process.

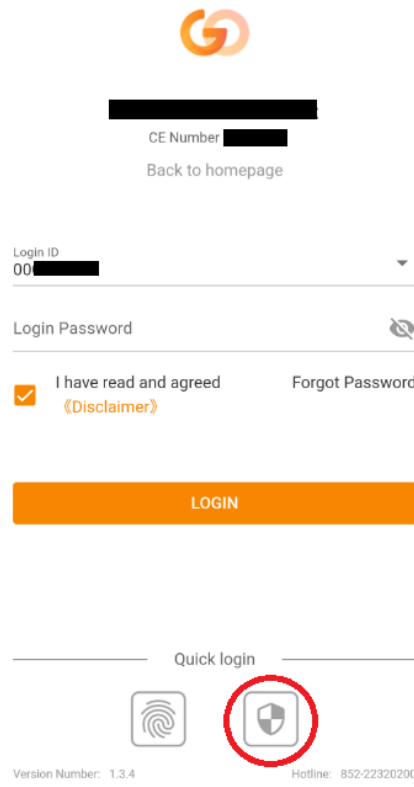


Fig. 3



Fig. 4

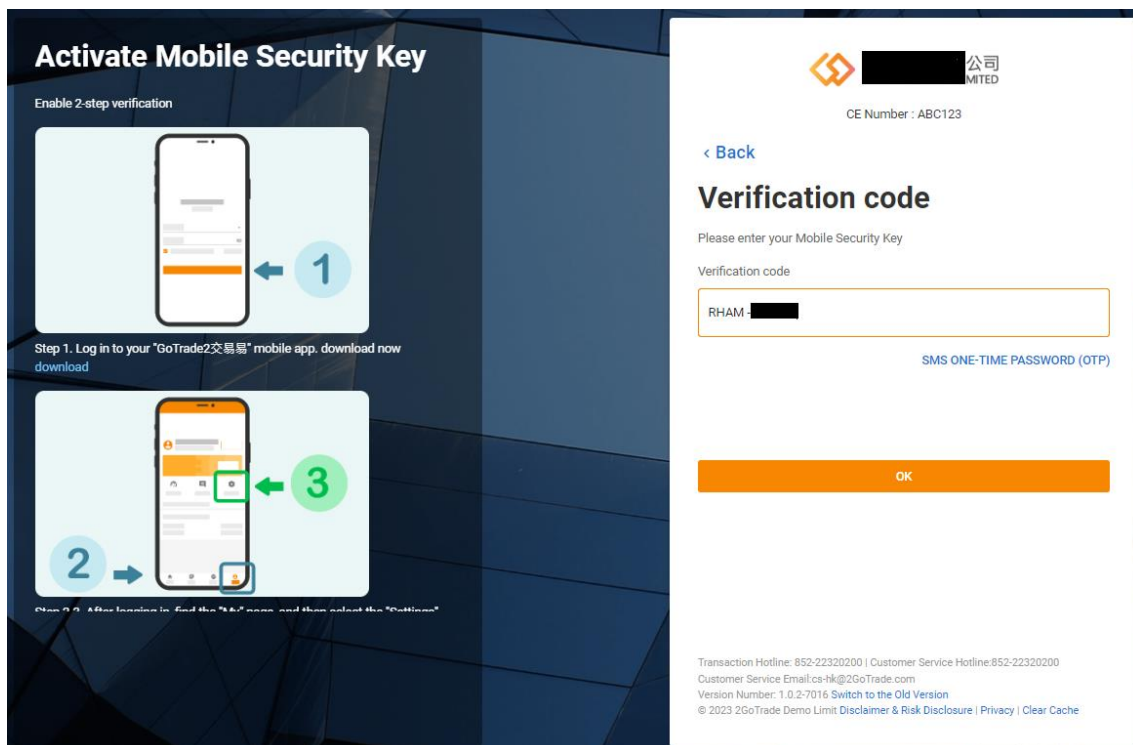


Fig. 5

## Forget password

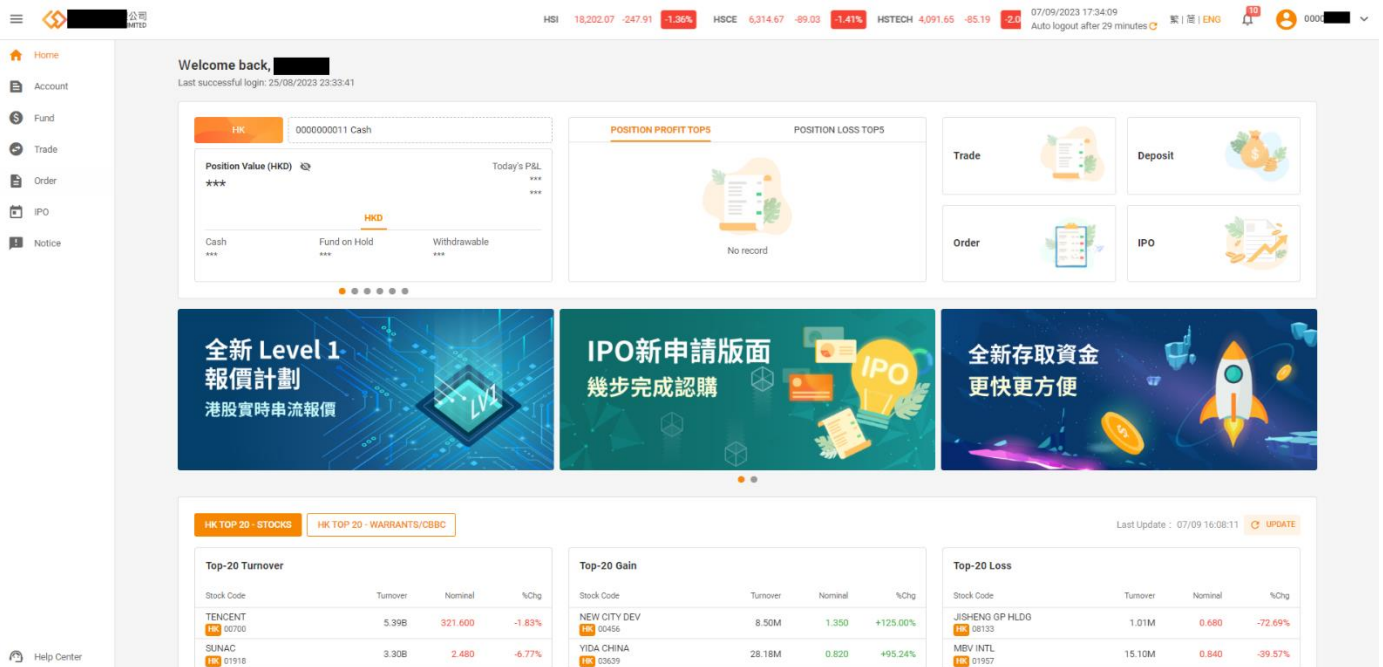
- Press <Forget Password> button on the login page
- Enter login ID and verification method (support mobile phone number or email) on the next page, and then click <OK> (Fig. 6)
- System will issue a 6-digit OTP. Please follow the instructions to enter the verification code and new password twice. Click <Submit> to complete the password reset (Fig. 7).

Fig. 6

Fig. 7

## 3. Landing Page



After successfully logging in, you will be redirected to the home page, with different sections displaying various functions.

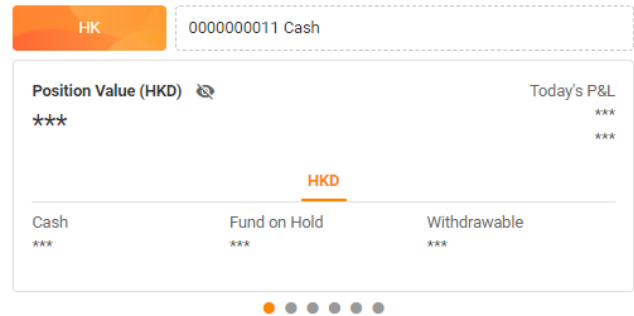


### Basic Functions

1	Indexes Area – Displaying Hong Kong Market Indexes (real-time or delayed, depends on subscribed plan of user)	
2	System time & remaining time (auto logout upon idle time exceeding preset duration)	
3	Language Selection	
4	Notifications – Displays system notices, order updates, fund management status, etc. (See Section 9)	
5	Login ID – click it to select white/ dark mode, reset password and log out	
6	Shortcut menu area at left – Main function buttons	

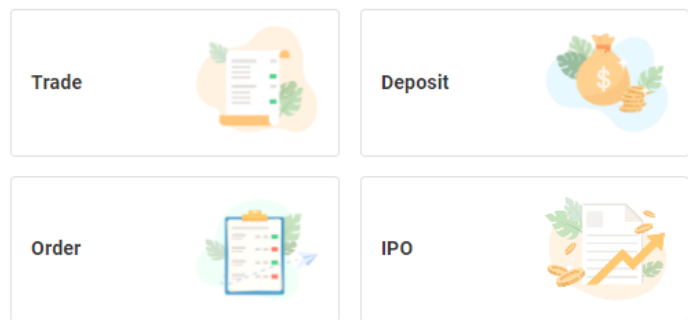
## Account Overview

- Main page displays asset details for each market.
- Click  to show / hide figures
- Click  to pop out menu to select other markets.




## Shortcut Buttons


- Click to enter Order ticket / fund deposit / order book / IPO pages



## HK Top 20

- Displays top 20 trading volume, gain & loss rankings of securities, warrants/CBBCs and ETFs in HK market
- Click specific equity to jump over to detailed price quote page (See Section 4.2)
- Press  to refresh the ranking

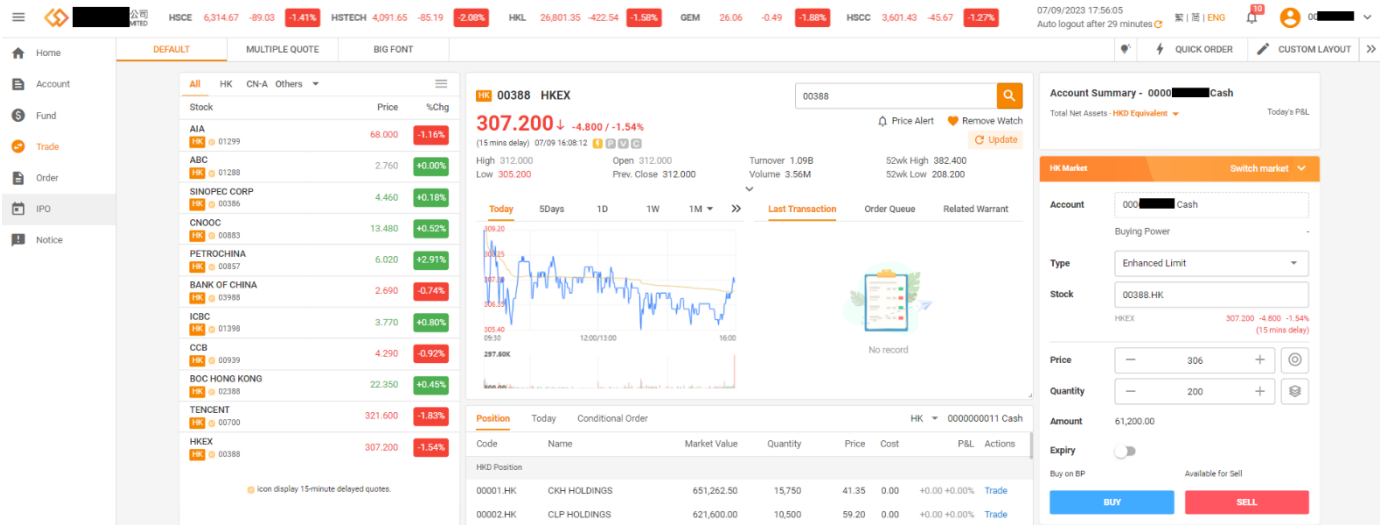
HK TOP 20 - STOCKS | HK TOP 20 - WARRANTS/CBBC

Last Update : 07/09 16:08:11 

Top-20 Turnover				Top-20 Gain				Top-20 Loss			
Stock Code	Turnover	Nominal	%Chg	Stock Code	Turnover	Nominal	%Chg	Stock Code	Turnover	Nominal	%Chg
TENCENT HK 00700	5.39B	321.600	-1.83%	NEW CITY DEV HK 00456	8.50M	1.350	+125.00%	JISHENG GP HLDG HK 08133	1.01M	0.680	-72.69%
SUNAC HK 01918	3.30B	2.480	-6.77%	YIDA CHINA HK 03639	28.18M	0.820	+95.24%	MBV INTL HK 01957	15.10M	0.840	-39.57%
MEITUAN-W HK 03690	3.03B	125.000	-2.57%	PLATT NERA HK 01949	1.15M	0.320	+60.00%	HYGIEIA GROUP HK 01650	3.59M	0.057	-32.14%
BABA-SW HK 09988	2.39B	90.800	-1.57%	CHINA ENV TEC HK 00646	11.64K	0.520	+40.54%	IB SETTLEMENT HK 00147	137.94K	0.071	-31.73%
COUNTRY GARDEN HK 02007	2.29B	1.070	-12.30%	UNITY ENT HK 02195	29.49M	0.700	+40.00%	TATA HEALTH HK 01255	154.81K	0.320	-22.89%
SMIC HK 00981	2.04B	19.820	-7.60%	WAN LEADER HK 08482	3.94M	0.090	+36.36%	GENES TECH HK 08257	171.25K	0.080	-21.57%
CNOOC HK 00883	1.85B	13.480	+0.52%	HAILAN HLDGS HK 02278	102.87K	4.280	+30.09%	SLING GROUP HK 08285	8.27K	0.047	-18.97%
AIA HK 01299	1.75B	68.000	-1.16%	ASIA ENERGY LOG HK 00351	7.21K	0.179	+27.86%	SHIMAO GROUP HK 00813	136.35M	1.010	-18.55%
PING AN HK 02318	1.48B	47.850	-2.45%	DOYEN INTL HOLD HK 00668	31.88K	0.249	+27.69%	CHINA HUAJUN GP HK 00377	2.86K	1.100	-18.52%
ICBC HK 01398	1.35B	3.770	+0.80%	NOVA GROUP HK 01360	183.78K	0.014	+27.27%	SKYFAME REALTY HK 00059	1.28M	0.018	-18.18%

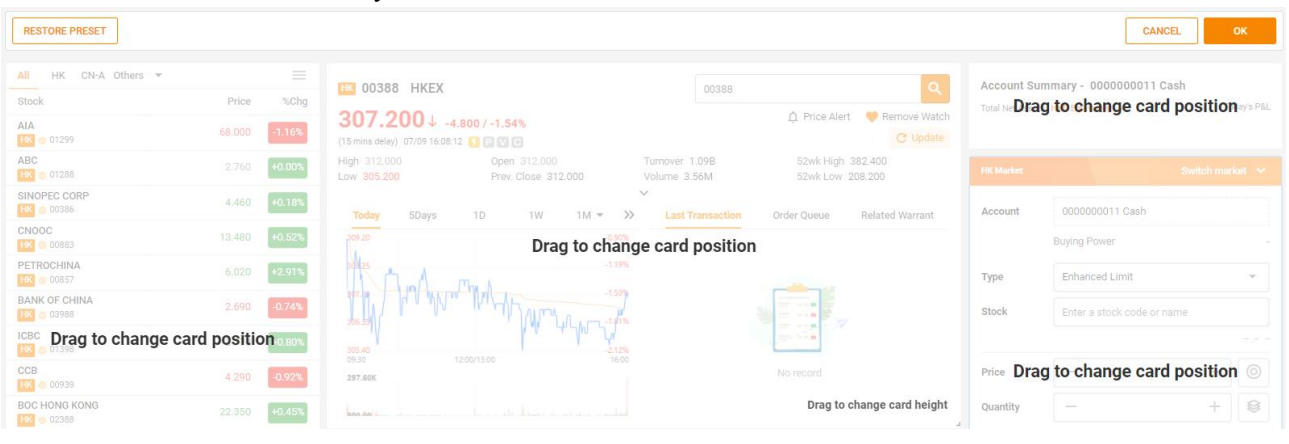


## 4. Trade



### Basic Functions

- 1 **DEFAULT** **MULTIPLE QUOTE** **BIG FONT** Interface mode. Click “Multiple Quote” or “Big Font” to change other display mode.
- 2 Keyboard hot key – display supported shortcut keys for order placing
- 3 **QUICK ORDER** After clicking and enabling it, no confirmation box will pop out during order placing
- 4 **CUSTOM LAYOUT** After clicking, you can freely drag, arrange and resize each card on Trade page as you preferred.  
 Press <OK> to save changes or <Restore Default Settings> to restore system values (as shown below).  
 At the same time, other platform interface settings of the same login ID (such as iPad) will also be reset simultaneously.



## 4.1 Shortlist

- You can view price quotes in the form of shortlist (Fig.8), including self-created selections, Hong Kong stock list, your securities holdings, etc.
- Press the upper right ☰ key to pop up the "Watchlist group and list management" form (right, Fig. 9), where you can create or sort list groups, etc.

Stock	Price	%Chg
AIA HK 01299	68.000	-1.16%
ABC HK 01288	2.760	+0.00%

Fig. 8

### Watchlist group and list management

All	☰
HK	↑ ☰
CN-A	↑ ☰

Stock	Group	Top	Drag
<input checked="" type="checkbox"/> AIA HK 01299	📁		☰
<input checked="" type="checkbox"/> ABC HK 01288	📁	↑	☰
<input type="checkbox"/> SINOPEC CORP	📁	↓	☰

Fig. 9

## 4.2 Single Price Quote

On Top 20 area on main page, various search boxes for stocks, related equities, etc., click on specific stocks to jump to the detailed price details of the security.

Depending on your subscribed plan (listed as below), the system will display the following levels of Hong Kong stock market information. See next page for further details.

### Delayed Feed (Default)

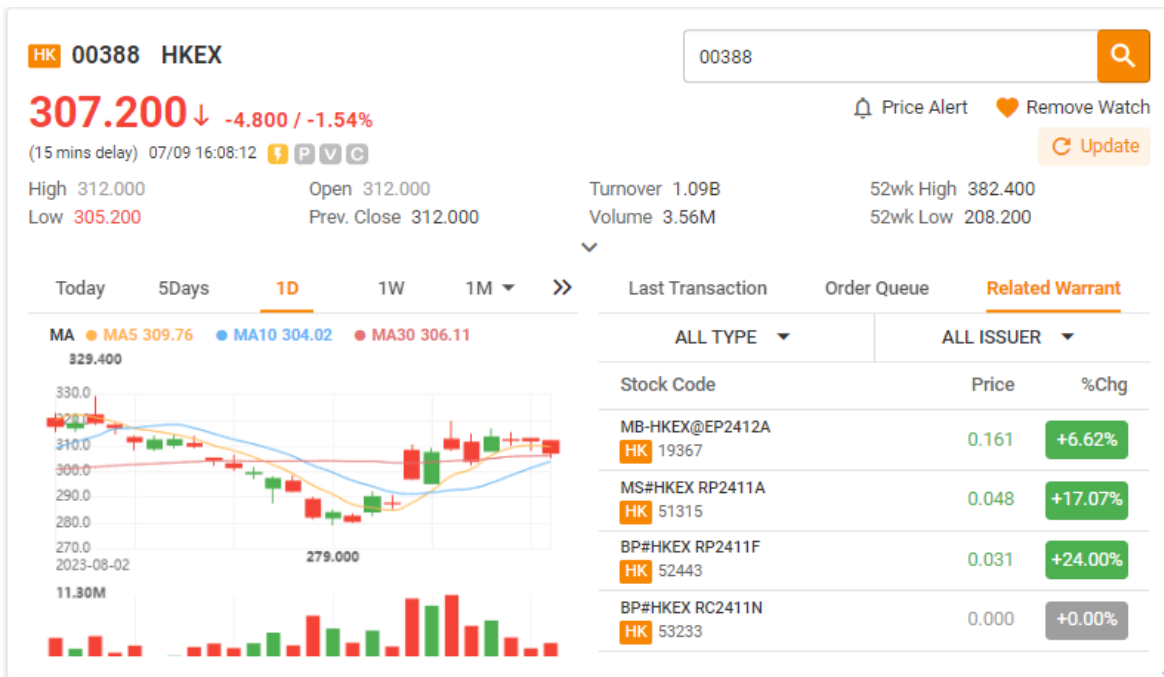
- Bid-ask queue with 1 price spread, 15-min delayed

### Real-time streaming

- Level 2 [10 spreads of bid-ask queue & broker queue]
- Level 1 [1 spread of bid-ask queue]

### Real-time snapshot

- Plan 1 [1 spread of bid-ask queue]
- Plan 2 [10 spreads of bid-ask queue]
- Plan 3 [10 spreads of bid-ask queue & broker queue]



- **Security nature** : Click to check icon info
- **Technical graph** : Technical analysis chart and trading volume chart: You can choose different time intervals
- **Real-time market info tabs**: browse specific security last matches, bid/ask queue & related warrants
- **Add / remove watch**: Press to add or remove security from shortlist.
- **Price Alert** pop out window to set up price alert or manage current alert (Fig. 10)

**PRICE ALERT**    MY ALERTS    ×

HKEK (00388)

-- /    Last Update :

**Add alert**

Reminder type

Price rises above

Reminder value

310.000

Frequency

Once only  
Alert only when the price arrives for the first time

Once a day  
Alert when the price arrives for the first time on each trading day

Continuously  
Alert every time the price arrives on each trading day

**ADD ALERT**

**Price Alert Setting**

No record

## 4.3 Order & Position Overview

Position		Today	Conditional Order		HK 0000000011 Cash			
Code	Name	Market Value	Quantity	Price	Cost	P&L		Actions
HKD Position								
00001.HK	CKH HOLDINGS	651,262.50	15,750	41.35	0.00	+0.00	+0.00%	Trade
00002.HK	CLP HOLDINGS	621,600.00	10,500	59.20	0.00	+0.00	+0.00%	Trade
00003.HK	HK & CHINA GAS	113,800.00	20,000	5.69	0.00	+0.00	+0.00%	Trade


- “Position” tab to display current holding of specific market. Press “Trade” to place order, or press “HK” to switch market.
- “Today” tab displays all order status of that day. Press detail, cancel, modify, duplicate for corresponding actions.
- “Conditional” tab displays all smart order status. Press detail / cancel for corresponding actions. Such orders do not support modify.
- Right click at any items of any tab to pop out menu to select available functions.


## 4.4 Order placing


(Note: certain functions are not available for non-HK markets)

**HK Market** Display current market. Press “switch market” to select others.

**Buying Power (BP)** Real-time amount available for order placing. Currency equivalent converted.

**Type** HK market supports all HKEX order types and smart types (market, stop, conditional, etc). Press menu to select (note: as per broker master setting, some order  types are not available)

**Price** Press  to pop out menu, to fill in order price with nominal price /+1/-1 spread. Or press < + > or <-> to switch to next spread.

**Quantity** Press  to pop out menu, to fill in order quantity with available shortcuts. Or press < + > or <-> to switch to next odd size.

**Expiry** Set up order expiry date using pop out calendar. Finally select buy/sell to submit order.

## 5. Account Overview

- 3 Tabs available for account record checking

<b>Account Summary</b>	Check asset status, today profit & loss, average price of holdings, underlying profit & loss, etc.
<b>Account Record</b>	Check up to last 6 month of account history, including: <ul style="list-style-type: none"> <li>• Trade</li> <li>• Fund deposit/withdrawal</li> <li>• Currency Exchange</li> <li>• IPO</li> <li>• Corporate Action &amp; others</li> </ul>
<b>Statement</b>	View and download previous daily and monthly statement

### Account

Account Summary
Account Record
Statement

Last Update : 11/09/2023 22:26:59

000000011 Cash

Total Net Assets - HKD Equivalent

Today's P&L

HK

CN-A

JP

SG

US

Others

HK							
Position Value (HKD)			Today's P&L		P&L		
Code	Name	Market Value	Quantity	Price	Cost	P&L	
HKD Position							
00001.HK	CKH HOLDINGS	654,412.50	15,750	41.55	0.00	+0.00 +0.00%	
00002.HK	CLP HOLDINGS	617,925.00	10,500	58.85	0.00	+0.00 +0.00%	
00003.HK	HK & CHINA GAS	113,200.00	20,000	5.66	0.00	+0.00 +0.00%	
00005.HK	HSBC HOLDINGS	2,363,650.00	41,000	57.65	0.00	+0.00 +0.00%	
00011.HK	HANG SENG BANK	29,222,400.00	304,400	96.00	0.00	+0.00 +0.00%	
CN-A							

## 6. Fund

Below Tabs are available for fund in/out management, currency exchange and history checking.

### 6.1 Fund Deposit

- Follow the on-screen instructions to complete fund deposit in four steps.
- Support eDDA quick deposit, online banking, ATM/counter, check and wire transfer (note: some channels are not available as preset by brokers)
- The right section is an explanation of the corresponding steps for each deposit method for users reference.

#### Fund

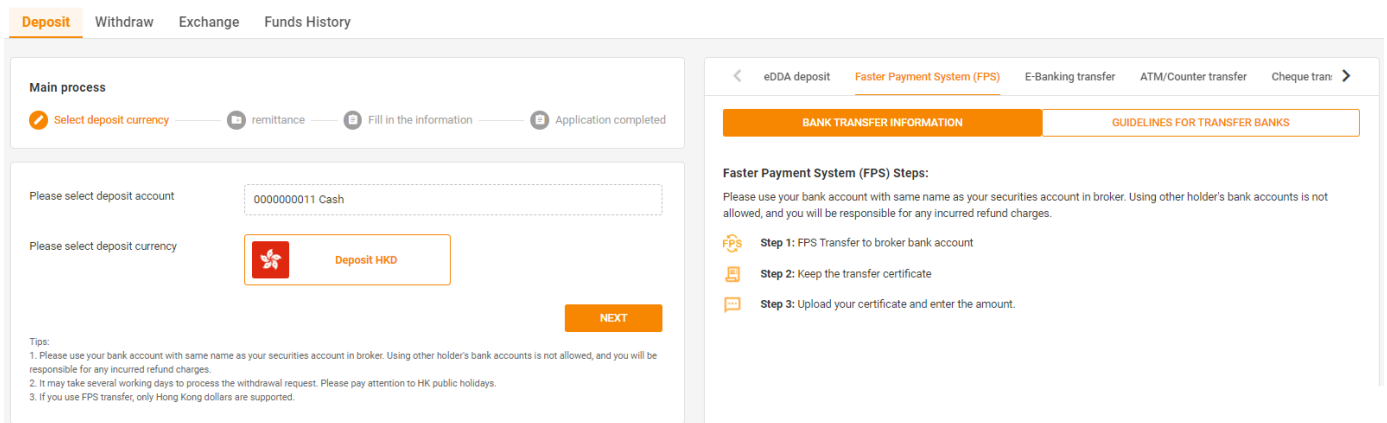


Fig. 10

- 1) Please select account to be deposited and currency first. Click <Next> (Fig.10)
- 2) Select deposit channel.  
Click <Next> (Fig.11)

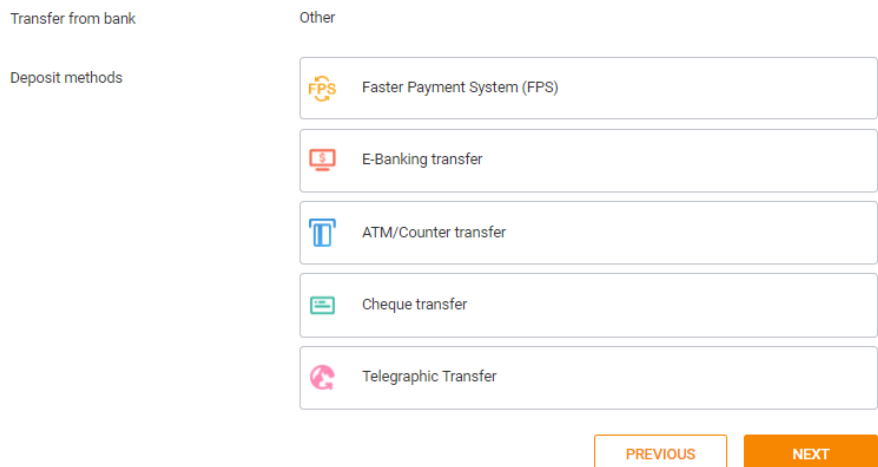


Fig. 11

3) Follow instructions to enter various information and/or upload supporting images (depending on channel). Click <Next>. (Fig. 12) Work flow for different channels will slightly vary. Please follow on-screen instructions to complete.

4) Press <confirm> in pop-up box, to notify broker to collect payment (depending on the channel).

5) Depending on channel or brokerage process, lead time for fund good at your securities account may vary.

Notification message will be sent when the fund is ready to use.

Transfer from bank: BANK OF CHINA

Account name: Chan Tai Man

Account Number: 004123123456456

Transfer to broker bank account: HSBC (\*\*\*\*\*7001)

Deposit amount: 100000 HKD

Transfer certificate: Require to display the complete transfer amount, account number, account name, and bank serial number, and transfer to broker bank account. (No more than 10M)

Remark (Optional): Please enter remark

Fig. 12

## 6.2 Fund withdrawal

1) Please select account to be deposited and currency first. Click <Next> (Fig. 13)

Please select withdrawal account: 0000000011 Cash

Please select withdrawal currency: Withdraw HKD

Withdraw to: No record

Withdrawal amount: 100000 HKD

Withdrawable: 0.00 HKD

Handling fee: [Blank]

Remark (Optional): Please enter remark

Tips: 1. Bank account name must be the same as the withdrawal account name. 2. It may take several working days to process the withdrawal request. Please pay attention to HK public holidays.

Fig. 13

2) Enter amount and remarks. Click <Next> (Fig.14)

3) System pop out small window. Press <Next> to complete application.

4) Depending brokerage process, withdrawal lead time may vary. Please check progress at "Fund History" page.

PREVIOUS NEXT

Fig. 14

## 6.3 Currency Exchange (FX)

- 1) Input currency and amount to be exchanged. Expected exchange amount will be calculated. Input remarks if necessary (Fig. 15)
- 2) Check details in pop-up box. Press <Confirm> to proceed.
- 3) Check progress at "Fund history" page (See Section 6.4 below).

**Exchange**

Please select account for

currency exchange

From

Exchangeable Amount **0.00**

Reference Rates

Handling Fee **Free**

To (Estimated)

Remark (Optional)

0 / 200

**SUBMIT**

Tips:  
Exchange rates indicated above are for reference only.

Fig. 15

## 6.4 Fund History

- Check Withdrawal, Deposit & Exchange records, up to last 1 year (Fig. 16).
- Instructions with "Processing" status can be overturned by pressing "cancel" button.
- Press "detail" of specific record to view full record.

Submit Time	Payer Bank	Payee Bank	Deposit Methods	Deposit Account	Deposit Amount	Status	Remark	Actions
11/09/2023 22:43	BANK OF CHINA (*****6456)	HSBC (*****7001)	E-Banking transfer	000000011 Cash	100,000.00 HKD	Processing		<a href="#">Detail</a> <a href="#">Cancel</a>
25/08/2023 00:08	HANG SENG (*****1133)	HSBC (*****7001)	E-Banking transfer	000000011 Cash	100,000.00 HKD	Processing	Urgent	<a href="#">Detail</a> <a href="#">Cancel</a>

Fig. 16



## 7. Order History

- Use “Order” button at main page to visit this page, to view order history, segregated by *normal order*, *conditional order* and *transaction summary* tabs

### Order

Normal Order Conditional Order Transaction Summary Last Update : 11/09/2023 22:56:53

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- Apply filter of stock code, market, day range, etc. to narrow down results
- Press <reset> to remove all filter and display all orders
- Press <details> of each order to read in-depth details

## 8. IPO

- Access by “IPO” button at main page or left side shortcut


### IPO

Open To be listed(grey mkt) History Last Update : 11/09/2023 22:58:44

Code	Securities Name	Cash Application Deadline	Margin Application Deadline	Offer Price	Prospectus	Research Report	Action
 No record							


  

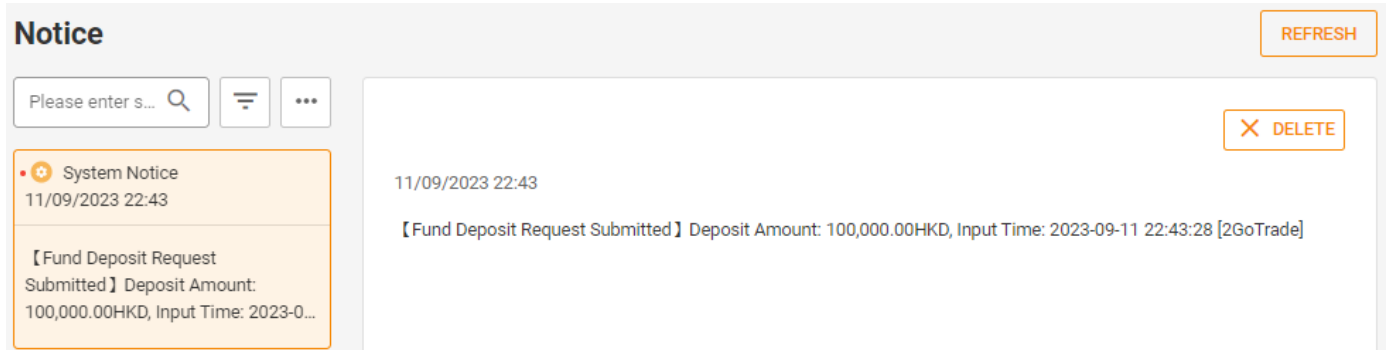
IPO Schedule





 No record							
--	--	--	--	--	--	--	--

- <Open> tab shows IPO currently available for subscribe, with details. Press <Subscribe> button to complete application process step-by-step as shown on screen.
- <To be listed (Grey Mkt)> tab shows the securities completed allotment process and awaiting for listing. The rightmost “action” column will show <Trade> button when grey market is active.
- <History> shows IPO subscription history and progress. Various functions are available at <Action> column including <cancel> to withdraw the subscription, if it’s still open.

## 9. System Notifications

- Press <notification> button at left side shortcut or  icon (number shows unread messages) to visit notifications page



-  Press to pop up menu to display message type (Fig.17)
-  More functions like mark all as read, or delete all notifications
-  Delete specific message
-  Manual refresh notifications

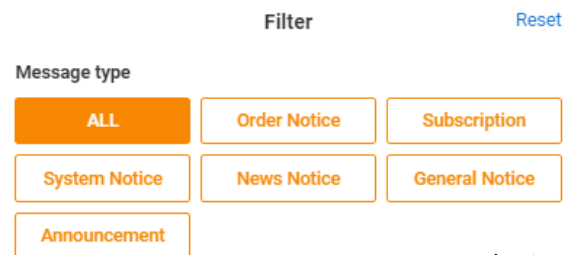



Fig. 17

## 10. Help Centre

- Press at left side  **Help Center** shortcut to visit <Help Centre> page

### Help Center

**Contact us**

Should you have any further enquiries, please contact us at Customer Service Hotline

Transaction Hotline      852-22320200

Customer Service Hotline      852-22320200

**Feedback**

Should you have any comments or advice, please leave a message. We are pleased to hear from you

[FEEDBACK](#)

**2GoTrade Demo Limit**

Broker Name	Wilson Cheung
Customer Service Email	cs-hk@2GoTrade.com
Version Number	1.0.2-7016

**Frequently Asked Question**

Enquires on FAQs? The answer to your question may already be available here

[ACCOUNT](#)    [TRADE](#)    [FUND](#)    [IPO](#)

**How to make my account more secure?**

We added TouchID/FaceID authentication to protect your personal information and trading activities, which can be enabled through "security settings" in the settings page. If your login is inactive for more than 30 minutes, our system will automatically logout your session to prevent unauthorized trading activities.

**TouchID/FaceID is not working ?**

After you cancelled your mobile device registration, FaceID/TouchID login and mobile security key will be disabled. You need to login with one-time password and re-registered to enable the FaceID/TouchID login functions.

- You can find contact details here
- **Opinion:** Press <Feedback> button to pop up window. Input your questions and attach file if necessary. Press <Submit> to complete
- **Frequently Asked Questions (FAQ)** are further categorized into Account, Trade, Fund and IPO tabs. Find suggested answers based on the FAQ

## 11. Setting

### Settings

#### Account Information

LV2 Advanced Quote HK Stock Real-Time Quotation DON'T SHOW AGAIN LEARN MORE

Login Account	00000001
Quotation Plan	HK Delay Quote Plan
Brokerage Terms	<a href="#">Privacy</a> <a href="#">Disclaimer &amp; Risk Disclosure</a> <a href="#">General Risks of Trading Derivatives</a>

#### Security Settings

Password Setting	<a href="#">Change Login Password</a>
------------------	---------------------------------------

#### Notification Settings

Order Notice	<input checked="" type="checkbox"/>	System Notice	<input checked="" type="checkbox"/>
News Notice	<input checked="" type="checkbox"/>		
Browser message push	<input checked="" type="checkbox"/>	You can turn on the notification permission of your browser to receive the latest news.	

Press <Settings> icon at left side shortcut to be access to below functions:

- Check you login ID and current market data plan subscribed
- Change password
- Notifications preference setting
- General UI preference

— The End —