

WESTPAC SHARE TRADING CLIENT GUIDE

This Guide is intended to provide information for education purposes only and is subject to change at any time without notice.

15 February 2023



Contents

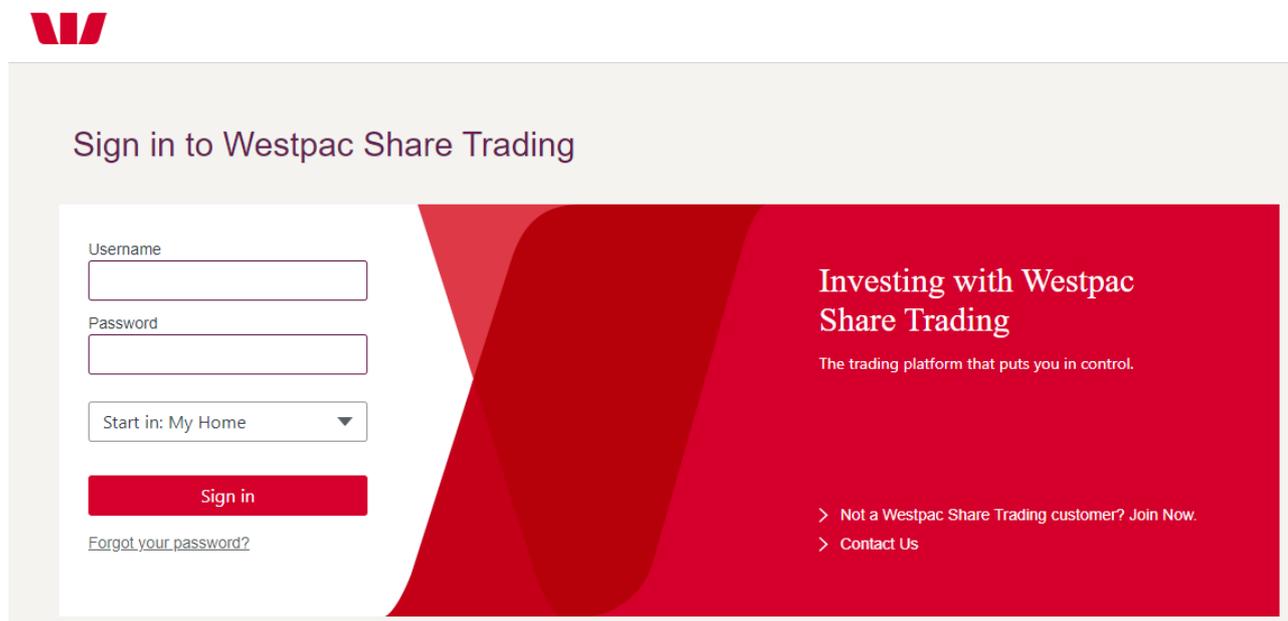
Logging into your Westpac Share Trading account	5
Westpac Share Trading login page.	5
Forgotten your password?	6
Westpac Live Online Banking website.	6
Westpac Share Trading mobile app.	7
Trading Code SMS.	7
How shares are registered	8
Broker Sponsored.	8
Issuer Sponsored.	8
'Transferring in' your existing shareholdings	8
Issuer to CHESS transfers.	9
Broker to broker transfers.	10
Your CHESS Holdings	12
Updating your personal and trading account details	13
Customising your home page	13
Securities that can be traded	15
Ways you can trade	15
Online.	15
Mobile app.	15
Over the phone.	15
How to place an online order	16
Managing your orders	18
Amending an open order.	18
Cancelling an open order.	20

Order Confirmation Notes	21
Free Trading Tools and Research	21
Live pricing.	22
Watchlists.	24
Alerts.	25
Company Information.	25
Current Stock Recommendations.	26
Stock Screener	28
Pre-defined Screens.	28
Custom Screener.	29
Customer Support	31
Learn & Support.	31
Frequently Asked Questions.	32

Logging into your Westpac Share Trading account

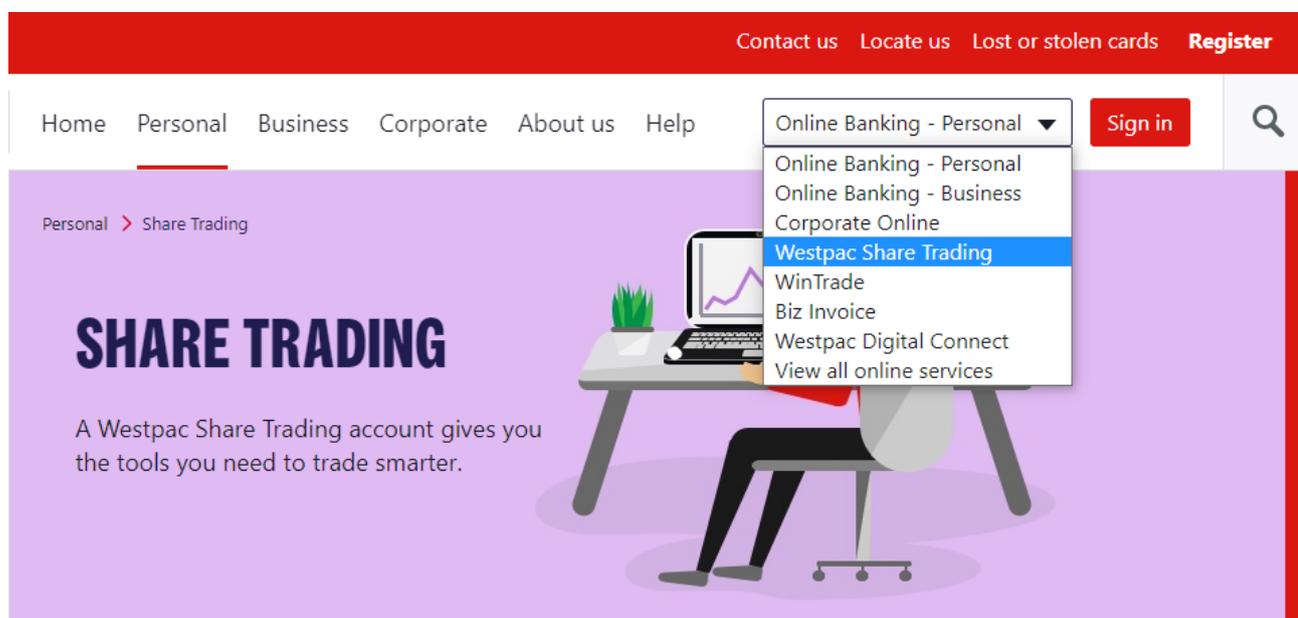
You can log into your Westpac Share Trading account using any of the following methods:

Westpac Share Trading login page.



There are two ways you can navigate to the Westpac Share Trading login page:

1. Go directly to sharetrading.westpac.com.au/login
2. Go to westpac.com.au and select **Westpac Share Trading** from the drop down menu in the top right.



Once on the login page simply enter your new username as provided in the welcome email sent to you by Westpac Share Trading. Enter the password you nominated on your account application. If you've forgotten your password you can click on the '**Forgot your password?**' link to reset your password. If you continue to experience difficulties logging in to your account please call us on 13 13 31.

Forgotten your password?

If you've forgotten your password or your account is locked due to multiple failed log in attempts, simply navigate to the login page and click on '**Forgot your password?**' to reset it.

Username

Password

Start in: My Home



Sign in

[Forgot your password?](#)

You will be required to enter your Username and registered mobile number. A security code will be sent to your preferred mobile number via SMS. You will be asked to enter this code online before being prompted to choose a new password.

Westpac Live Online Banking website.

If you're an existing Westpac Banking client you can access your Westpac Share Trading account when logged into the Westpac Online Banking website. While on the Westpac Online Banking home page, look for the tile named '**Share Trading (Equity)**' to easily access your Westpac Share Trading account. For your convenience you will not be required to enter your Westpac Share Trading username and password in the future following your first log in. If you cannot see the '**Share Trading (Equity)**' tile please contact us on 13 13 31

Share Trading
(Equity) 

1234567
as at 8:54am, 23 Aug 2022

Market value
\$130,572.50

At any time you can navigate back to Westpac Online Banking by clicking on **> Return to Westpac Online Banking** located above your Username in the top right corner of the Westpac Share Trading website.

[> Return to Westpac Online Banking](#)

1234567 - MR JOHN SAMPLE



USERNAME

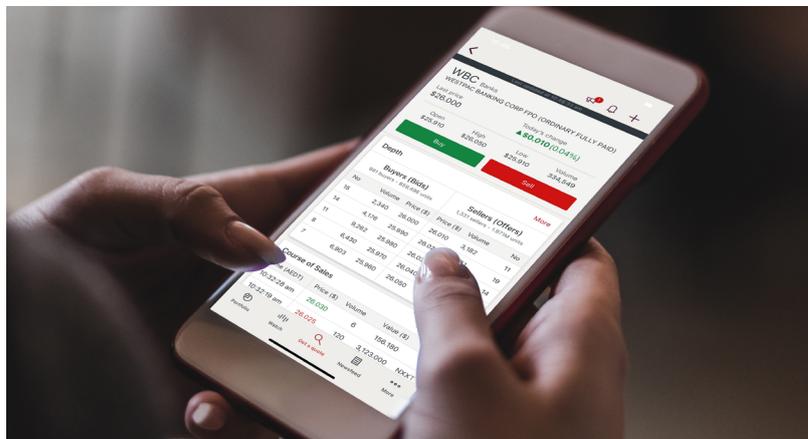


Log out

If you are not registered for Westpac Online Banking you can register at banking.westpac.com.au/wbc/banking/registration

Westpac Share Trading mobile app.

You can also access your Westpac Share Trading account on an iPhone or Android smartphone using our dedicated Westpac Share Trading mobile app. The key features of our app include the ability to view your portfolio, view live prices including market depth, create watchlists, place trades for Australian shares, warrants and ETFs, and receive price alerts. You can set up your access using a 4 Digit PIN, Touch ID or Face ID for a quicker login. The Westpac Share Trading app can be downloaded from the App Store™ and Google Play™.



Managing your password.

If you are logged in to the Westpac Share Trading website, you can change your password by going to **My Account > My Profile > Manage Passwords** and saving the new password.

Trading Code SMS.

Trading Code SMS is an additional layer of security when placing or amending trades online.

You can opt in to Trading Code SMS online via **My Account > Password & Trading Code**.

When opted in to the Trading Code, all accounts that you have trade authority on (excluding any Global Markets Accounts) will require a security SMS code to be sent to your preferred mobile number. This will occur when placing a new order on an account or amending an existing order.

Client: MR JOHN SAMPLE

Accounts Trading Code will be linked to
> 1234567 - MR JOHN SAMPLE

Preferred Mobile Number: XXXXXXXXXX

If your preferred mobile needs updating or is incorrect, please [update](#) on the 'Personal Details' page before opting in/out.
Only the preferred mobile number will receive the SMS Trading Code

Opt In for Trading Code: Yes No

I acknowledge that I am opting in/out of the additional security of Trading Code SMS when placing equity trades on the above listed accounts. I confirm that my preferred mobile number is up to date.

***Get SMS Security Code:** The SMS will be sent to XXXXXXXXXX

***Enter the SMS Security Code:**

The SMS will contain a 6 digit code to enter into the designated section on the order review page before submitting your order to market.

Note: This code is not required when trading through the Westpac Share Trading mobile app. You can opt out at any time as this service is optional.

How shares are registered

When you purchase shares through Westpac Share Trading, payment for the shares is required two business days after the trade date. Following your payment, the shares will be transferred and registered in your name and address, as per the registration details of your share trading account. The ownership of most Australian securities do not involve paper certificates. Instead, ownership is recorded electronically by each company's share registry on their principal register. The principal register is made up of the shares registered on two subregisters, the subregister sponsored by the share issuer (Issuer Sponsored) and the CHESS subregister (broker sponsored). CHESS (Clearing House Electronic Subregister System) is operated by the Australian Securities Exchange (ASX Limited) and requires you to be sponsored by a broker. As a Westpac Share Trading client your shares will be broker sponsored by the Australian Investment Exchange (AUSIEX) on the CHESS subregister. You will receive a paper statement for each company shareholding confirming your registered details and the number of shares you own regardless of whether the shares are Issuer sponsored or broker sponsored.

Broker Sponsored.

Broker sponsored trading accounts will be assigned a single Holder Identification Number (HIN) which starts with the letter 'X'.

If your holdings are broker sponsored, you will have just one HIN for all your holdings with your sponsoring broker. If you have more than one broker you will have a separate HIN with each broker.

There are a number of benefits to being broker sponsored by AUSIEX:

- You can easily view all your shareholdings in a single place through your Westpac Share Trading account.
- If you change your name or address there's no need to notify the share registry of each holding. Simply update your registered name and/or address of your Westpac Share Trading account and all your broker sponsored holdings will automatically be updated.
- You can sell shares easily without needing to locate and provide a Security-holder Reference Number unique to that shareholding.
- Your trading limit with Westpac Share Trading may increase if the value of your sponsored holdings increases.
- If you have a linked Westpac Cash Investment Account you have the option to participate in our Dividend Direction Service for all your broker sponsored holdings. Our Dividend Direction Service offers the convenience of your Westpac Cash Investment Account being automatically nominated to receive your dividends. More details can be found at **Contact & Support > Learn & Support > FAQs**.

Issuer Sponsored.

Shares you may have acquired along the way, such as through another broker, a share float, or employee share plan, may be registered on each company's issuer sponsored subregister rather than CHESS. Each Issuer Sponsored shareholding is registered with a unique Security-holder Reference Number (SRN) which starts with the letter 'I' or 'S'.

If you hold Issuer Sponsored shares in different companies, you will find that you have a different SRN on each holding statement.

To sell Issuer Sponsored holdings, you will need to provide Westpac Share Trading with your SRN at the time you place the order. Orders to sell an issuer sponsored holding will attract an SRN fee of \$15 per trade that will be added to your trade brokerage.

Alternatively, you can transfer your issuer sponsored shares to your broker sponsored account with Westpac Share Trading.

'Transferring in' your existing shareholdings

If you own shares that are not currently broker sponsored by Westpac Share Trading, you can request to have some or all of these shares transferred to your Westpac Share Trading account as a broker sponsored CHESS holding.

Issuer to CHESS transfers.

If your shares are issuer sponsored i.e. has an SRN, you can make an online request to transfer these into your trading account by navigating to **My Account > Holdings & Accounts > Transfers**.

When 'transferring in' Issuer Sponsored shares your registered name and address (including your title/salutation) for that shareholding must exactly match the CHESS registration details of your Westpac Share Trading account, otherwise we won't be able to 'transfer in' the shareholding.

To check simply compare your registered details on the Issuer Sponsored holding statement against your current CHESS registration details with Westpac Share Trading. Your CHESS registration details can be located on the **Transfers** page (see below).

Example only:

MR JOHN SAMPLE (HIN: 23456789)

Holdings	Account Details	Transactions	Transfers
----------	-----------------	--------------	-----------

Issuer to CHESS Transfer

To complete an online Issuer to CHESS transfer you will need to provide your Security holder Reference Number (SRN). This is located on the Issuer Sponsored Holding Statement - a letter sent to you by the share registry informing you of the shares you own in a company.

If you do not know your SRN, please contact your [Share Registry](#).



Important: It is a CHESS requirement that the registration details (name and address) on your Issuer Sponsored Statement exactly match the registration details (name and address) of your selected account. A match is required for our system to accept your transfer request.

Please remove the I from SRNs for the Share Registry 'Boardroom' or they will be rejected.

Account Details

Account	1234567 - MR JOHN SAMPLE
HIN	23456789

CHESS Details

Name	MR JOHN SAMPLE Update Name
Address	88 SMITH STREET, SAMPLETOWN NSW 2999 Update Address Update Address Online

If there are any discrepancies between your CHESS and issuer sponsored registration details, we recommend you update them with the share registry or Westpac Share Trading prior to attempting the transfer.

To request an 'Issuer to CHESS transfer' simply enter the ASX code, SRN and number of shares/units you wish to transfer.

Example only:

Enter the SRN details

Issuer Sponsored Securities

BHP	I00099999999	100		
-----	--------------	-----	---	---

For transfers to be successful, the shareholder name (including salutation) and address on the statement must match the CHESS details above. This transfer request will be manually verified by our team with the share registry.

Proceed

To add additional shareholdings click on  and enter the required security details.

Click on **Proceed** to submit your transfer request. Westpac Share Trading will confirm each shareholding with the relevant share registry before initiating the transfer of your shares.

Broker to broker transfers.

If your existing shares are currently broker/CHESS sponsored with a broker other than Westpac Share Trading, you can request to have some or all of them transferred to your Westpac Share Trading account.

If your request is for all your shares to be transferred from the existing broker we may arrange for the HIN and all the shareholdings within to be transferred to AUSIEX. This means you will keep your existing HIN, however the sponsor of that HIN will change to Westpac Share Trading. All your existing TFN, dividend and bank account details with each share registry will remain unchanged.

If your request is to transfer only some of your shares, your existing HIN will remain with the existing broker. Only those shares you have requested will be transferred into your HIN with Westpac Share Trading. In this case you will have two HINs, one sponsored by your existing broker and one sponsored by AUSIEX.

To transfer broker/CHESS sponsored shares with another broker to your Westpac Share Trading account please complete and return a [Share Transfer form](#).

You will need to provide your existing broker's CHESS Participant Identifier (PID) and your HIN with the broker. This information can be easily located from a CHESS holding statement of a security currently sponsored by the existing broker.

Example only: CHESS holding statement.

Company logo and name



Your name and address as registered in CHESS

CHESS HOLDING STATEMENT

For statement enquiries contact your CHESS Sponsor:

Your sponsoring broker's name and address

Holder ID Number (HIN): Your HIN

CHESS Sponsor's ID (PID): 5 digits

Statement Period:

Page: 1 of 1

ASX code - ORDINARY FULLY PAID

Date	Transaction Type	Transaction ID	Ex/Cum Status	Quantity On	Quantity Off	Holding Balance
Balance Brought Forward from						
Date	Transaction description					Number of units held

FOR YOUR INFORMATION

- To obtain full terms and conditions of an Issuer's securities contact the Issuer's Registrar or the Issuer directly.
- For information about CHESS Depository Interests (CDIs) and to obtain a free copy of the Financial Services Guide (FSG) or any supplementary FSG for CHESS Depository Nominees Pty Ltd go to www.asx.com.au/cdis or phone 131 279.
- ASX Settlement may by law need to disclose information in CHESS Holdings to third parties.
- Do you have a small shareholding? Donate to Australian charities using ShareGift's brokerage-free service & receive tax deduction when over \$2. www.sharegiftaustralia.org.au

Refer overleaf for additional important information



ASX

Issued By:
ASX Settlement Pty Limited | ABN 49 008 504 532 | PO Box H227, Australia Square, Sydney NSW 1215

Share Registry Details:
Share registry name and address

Please note that once your requested shares have been transferred to your Westpac Share Trading account you will receive a new CHESS holding statement for that security at the end of the month. Shares that are broker sponsored by Westpac Share Trading will show **Australian Investment Exchange Ltd** as your new CHESS sponsor.

Your CHESSE Holdings

You can view your broker sponsored holdings by navigating to **My Account > My Portfolio > Holdings & Accounts** and clicking on the **Holdings** tab.

Here you can also manually enter your issuer sponsored shares, and managed funds, to see a more complete picture of your investment portfolio.

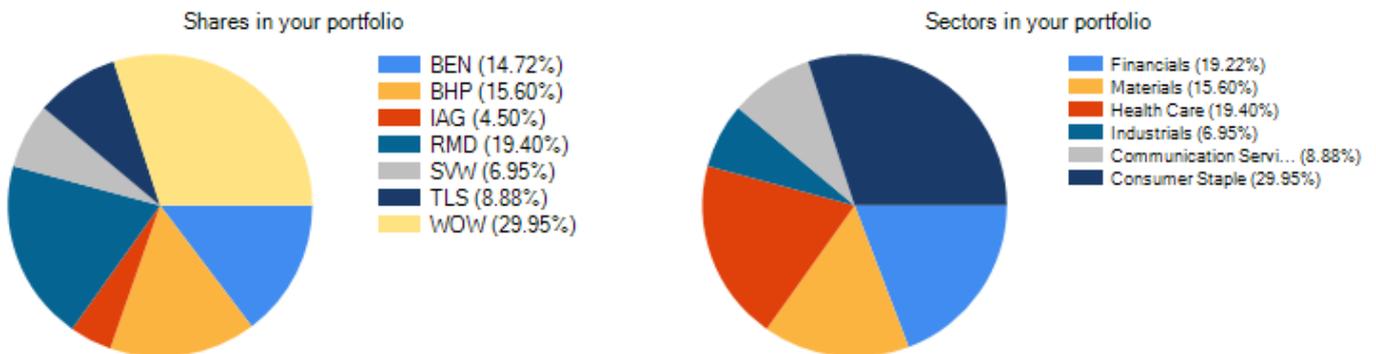
Example only: Holdings page with CHESSE and Issuer Sponsored shareholdings.

Share Holdings Download CSV Edit Add Issuer Holding Thu 18 Aug 2022 11:45 AM (Sydney time)										
Code	Available Units	Reserved Units	Purchase Price(\$)	Last Price(\$)	Market Value(\$)	Profit / Loss Value(\$)	Profit / Loss(%)	Change (Today) Price(\$)	Change (Today) Value(\$)	Actions
CHESSE										
There are no CHESSE holdings on this account.										Transfer Shares
> Add holdings by placing a BUY order										
Issuer										
BEN	2,000		8.550	9.690	19,380.00	+2,280.00	+13.33	+0.080	+160.00	Buy Sell ▼
BHP	500		35.750	41.100	20,550.00	+2,675.00	+14.97	+0.250	+125.00	Buy Sell ▼
IAG	1,300		6.000	4.570	5,941.00	-1,859.00	-23.83	-0.080	-104.00	Buy Sell ▼
RMD	750		12.930	33.920	25,440.00	+15,742.50	+162.34	-0.130	-97.50	Buy Sell ▼
SVW	500		19.500	18.280	9,140.00	-610.00	-6.26	+0.070	+35.00	Buy Sell ▼
TLS	2,850		3.500	4.095	11,670.75	+1,695.75	+17.00	+0.005	+14.25	Buy Sell ▼
WOW	1,000		26.820	39.350	39,350.00	+12,530.00	+46.72	-0.040	-40.00	Buy Sell ▼
Subtotal					131,471.75	+32,454.25	+32.78		+92.75	
Total					131,471.75	+32,454.25	+32.78		+92.75	

You can also view the composition of your share portfolio in pie charts, broken down by security and market sector.

Example only:

Share Holdings Summary Chart - CHESSE and Issuer Sponsored



Updating your personal and trading account details

Your personal profile which consists of the following details can be updated online by navigating to **My Account > My Profile > Personal Details**.

- Residential address
- Postal address
- Contact phone numbers
- Email addresses
- Promotional information preference
- Settlement notification preference

If you update your postal address and you are the primary party of a single individual and/or joint individuals trading account, then the registered CHESS address of your single individual and/or joint individuals trading accounts will also be updated.

If you are a director of a company or company trust trading account, updating your personal profile will not update the address details of the company trading account. To update the addresses of a company or company trust account please complete and return a Change of Address form.

Customising your home page

When logged in, the homepage makes it easier for you to customise and manage your portfolio to best suit you.

Your homepage pulls together all the features you have told us are important to you, including the ability to view your portfolio/s, manage your watchlist/s, keep track of upcoming settlements, monitor market insights and more – all on the one page.

We appreciate that not all customers are the same, so you can now personalise your homepage by adding, removing, and duplicating sections.

Widgets available to you:

Stock Quote or Search – Navigate quickly through the website or get a quote for a stock.

Share holdings – Quick view of your CHESS holdings and performance for all your accounts. Using the default tick box, you can set your most viewed account.

Watchlists – Set up watchlists to track stocks and their performance. You can have 20 watchlists and set your default to your favourite at the time.

Market Watch – Quick view of stock movements based off 7 filters including ‘Top stocks by % rise’ and ‘Top stocks by \$ fall’.

Daily Market Updates – Snapshot summary of the ASX and World Markets provided by Morningstar.

Estimated Settlements – Shows the upcoming estimated settlements on your trading accounts. It will include the date of settlement and estimated amount that will be debited or credited. This calculation is updated throughout the day to accommodate for any offset buys/sells.

Most Popular Stocks – Quick view of the top 5 stocks bought and sold through Westpac Share Trading for the trade day.

Market Indices – Overview of the value and change for 5 different Market Indices.

News Feed – View the most recent market news and research articles.

Site News – Important information regarding updates or changes to our platform, service and offering.

Currency Exchange Rates – Compare the AUD against the value of 5 other currencies.

To change the widgets on your homepage, select the **'Manage'** button and choose the widgets you'd like to appear on the left column (wide) or the right column (narrow) and select **'Save Locations'**.



Quick Quote or Search

Manage

Left Column (Wide)

- 1: ▼
- 2: ▼
- 3: ▼
- 4: ▼
- 5: ▼
- 6: ▼

[Reset to Defaults](#)

Right Column (Narrow)

- 1: ▼
- 2: ▼
- 3: ▼
- 4: ▼
- 5: ▼
- 6: ▼

[Cancel](#)

[Save Locations](#)

Securities that can be traded

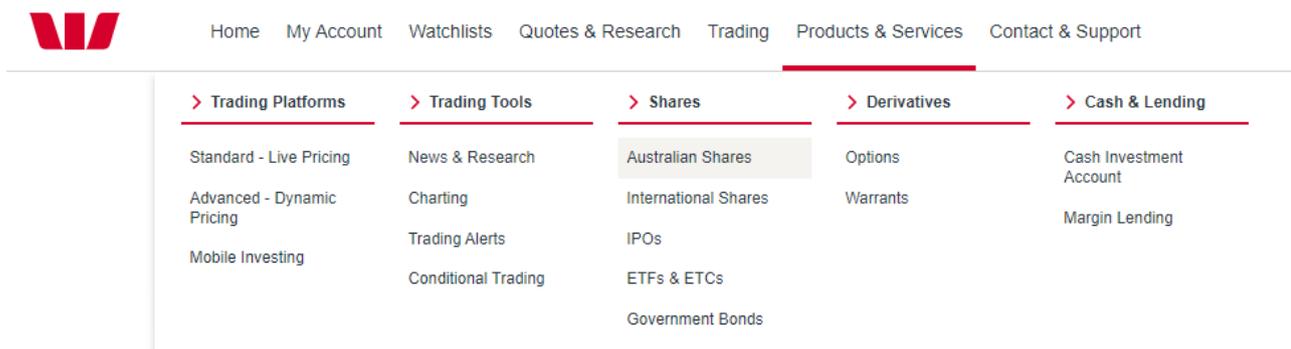
Westpac Share Trading offers access to a range of securities that are listed on the ASX and Cboe securities exchanges. They include:

- Listed shares
- Listed warrants
- Listed fixed interest securities
- Listed government and corporate bonds
- Exchange Trade Funds (ETFs)
- Exchange Traded Commodities (ETCs)
- Exchange Traded Options (ETOs) - you will be required to apply for an Options trading account
- Listed company-issued options
- Listed unit trusts
- Listed convertible notes
- Renounceable rights

You can also access equities in 26 international exchanges through Westpac Share Trading*. To trade international shares you will be required to apply for a Global Markets Trading account.

For more information about the various securities and products available, go to Products & Services.

* Global Markets trading is provided by Pershing LLC, ARBN: 108 110 149, AFSL no 271837, member FINRA, NYSE, SIPC through Australian Investment Exchange Ltd (“The Participant”) ABN 71 076 515 930 AFSL 241400, a Participant of the ASX Group.



Ways you can trade

Online.

Log in to your trading account at sharetrading.westpac.com.au and navigate to **Trading > Share Orders > Place Order**.

Mobile app.

Log in to your trading account using the Westpac Share Trading mobile app and navigate to **More > Trade**.

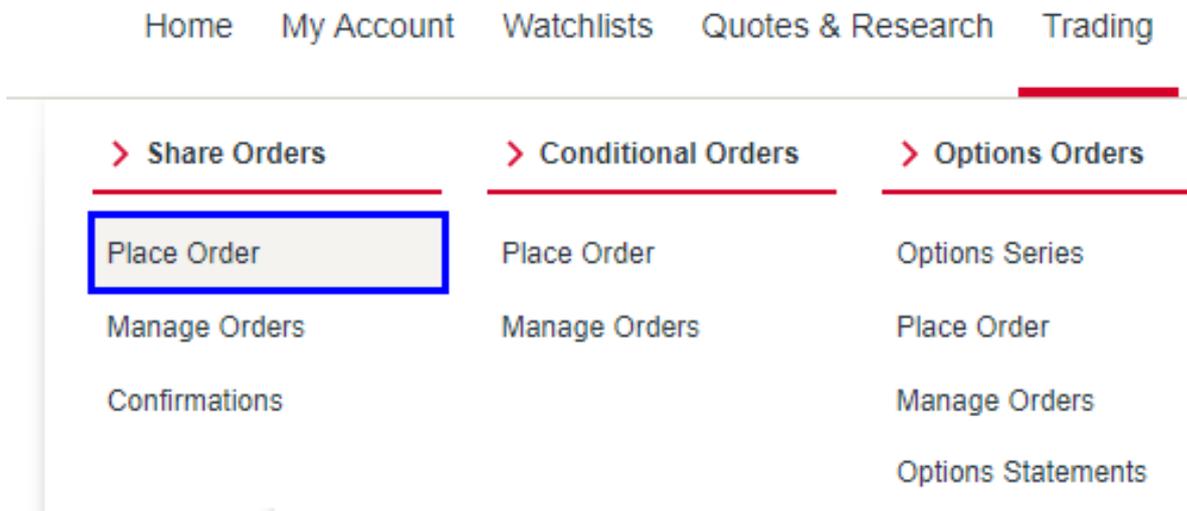
Over the phone.

If you don't have access to the internet or a smartphone, you can call Westpac Share Trading on 13 13 31 and we'll place the trade on your behalf.

Please note: Brokerage rates will vary depending on whether a trade is placed online or over the phone. For a list of our brokerage rates please refer to the brokerage rates table in our [Financial Services Guide](#).

How to place an online order

To trade online, go to **Trading > Share Orders > Place Order**.



You can also place a trade from your watchlists and company research pages where you see the Buy and Sell buttons or links.



The online order pad will be displayed and will require the following inputs:

Example only:

*Required Fields

② Account: 1234567 - JOHN SAMPLE

② ① *Order Type: BUY
 SELL

② ② *Code: BHP GROUP LIMITED FPO (ORDINARY FULLY PAID)

② ③ *Quantity: or Value (\$):

② ④ *Price Limit (\$): or At Market

② ⑤ *Expiry: or Good for Day

Order Value (\$): 4,120.000

Brokerage & Cost (\$): 19.950 (Includes GST)

Total (\$): 4,139.950

As at 05:38 PM Monday, 22 August 2022 (Sydney time)
Estimate Only. Price may vary significantly

⑥

- ① Select the **BUY** or **SELL** order type.
- ② Enter the security code. If you don't know the code enter the security name and click 🔍 to search and select the required security from the list of search results.
- ③ Enter the quantity of shares or the maximum value you wish to buy or sell. If you enter a dollar value we will calculate the maximum number of shares that will result in your order not exceeding the amount you have entered.
- ④ Enter the price limit per share you wish to buy or sell at. Alternatively, select **At Market** if you wish to trade immediately at the prevailing market price. **Please note: At Market orders can only be placed during market hours (between 10am and 4pm Sydney time on trading days).**
- ⑤ Select your order expiry date (up to 21 calendar days) or select **Good for Day** if you would like your order cancelled at the end of the trading day if not filled.
- ⑥ Click on **Proceed** and review your order.

Example only:

Details of your order instruction are shown below for your approval and confirmation.

⑦ **Account:** 1234567 - MR JOHN SAMPLE

Order Type: BUY

Code: BHP

Description: BHP GROUP LIMITED FPO (ORDINARY FULLY PAID)

Quantity: 100

Price Limit (\$): At Limit (40.000)

Expiry: Good Until Expiry (12/09/2022)

Order Value (\$): 4,000.000

Brokerage (\$): 18.140 (Excludes GST)

GST (\$): 1.810

Total (\$): 4,019.950

As at 09:51 AM Tuesday, 23 August 2022 (Sydney time)

⑧ Cancel

⑧ Change

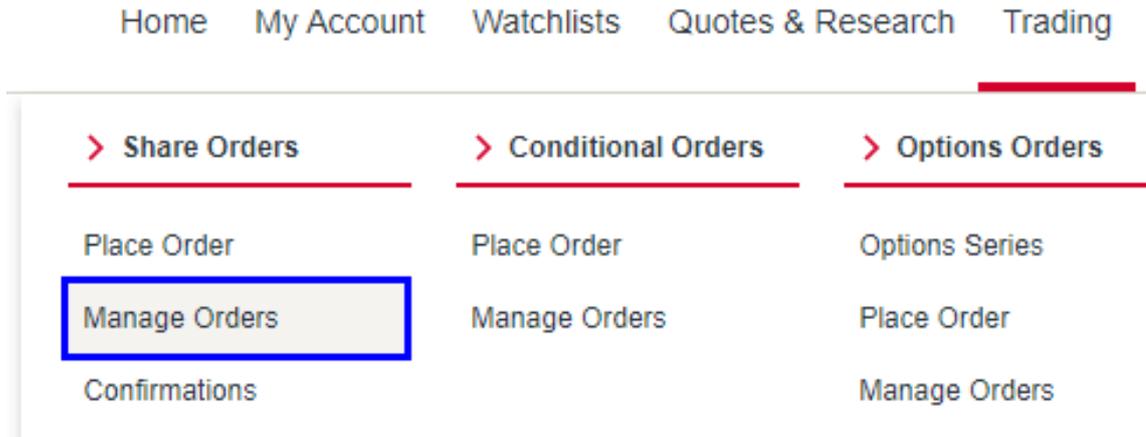
⑨ Submit Order

- ⑦ Review the details of your order instruction.
- ⑧ If you wish to amend or cancel your order click **Change** or **Cancel**.
- ⑨ Click **Submit Order** to confirm and place your order.

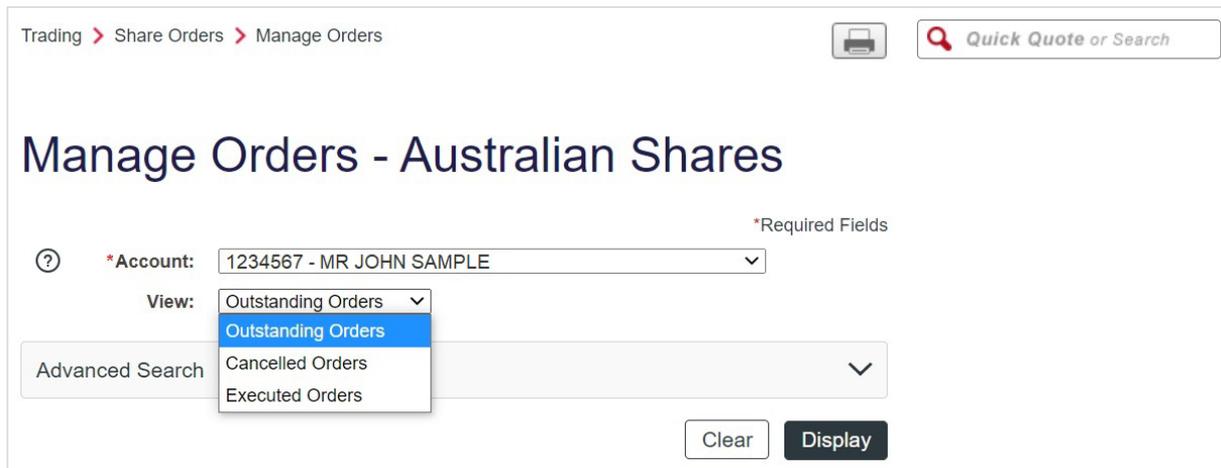
Managing your orders

At any time you can review, amend and cancel any of your open orders. Open orders are orders currently in the market that are unfilled or partially filled. If you cannot locate an open order to amend or cancel, your order may already have been executed in which case you will not be able to make any changes and you will need to ensure that you have sufficient funds or shares, as relevant, to settle the order.

Navigate to **Trading > Share Orders > Manage Orders** from the top navigation menu.



Select **Outstanding Orders** from the **View** dropdown list and click **Display**.



Amending an open order.

Once you have found your order under **Action** on the right hand side select **Amend**. A prefilled order pad will be displayed allowing you to increase or decrease the total quantity, amend the **At Limit** price or **Order Duration**. Once you've made your changes simply click **Proceed**, review the changes and then click **Amend Order**.

Example only:

Order Date / Time ^	Order Number	Order Type	Code	Quantity Ordered	Quantity Outstanding	Quantity Executed	Price (\$)	Expiry Date	Status	Actions
23/08/2022 9:51 AM	ZGJPX-W	Buy	BHP	100	100	0	40.000	12/09/2022	Open	Actions ▾

1 result found

Information on this page is periodically archived. Depending on your trading volume, you will be able to view up to 2 months order history. All holdings, financial transactions and confirmations can be accessed from the Portfolio section. If you require a copy of your archived order history, [contact us](#).

Amend Order

Account: 1234567 -MR JOHN SAMPLE

Order Type: **BUY**

Code: BHP

Description: BHP GROUP LIMITED FPO (ORDINARY FULLY PAID)

Price Limit (\$): At Limit (40.000)

Quantity Ordered: 100

Quantity Executed: 0

Expiry: Good until expiry (12/09/2022)

Amendments



*Required Fields



*Expiry:  or Good for Day



*Quantity Ordered:



*Price Limit (\$): or At Market

Order Value (\$): 3,950.000

Brokerage & Cost (\$): 19.950 (Includes GST)

Total (\$): 3,969.950

As at 10:03 AM Tuesday, 23 August 2022 (Sydney time)
Estimate Only. Price may vary significantly.

Clear

Cancel

Proceed

Cancelling an open order.

Under **Action** select **Cancel**. A summary of the order will be displayed. Select **Cancel order** at the bottom of the page. You will receive a notification if the request has been successful.

Example only:

Order Date / Time ^	Order Number	Order Type	Code	Quantity Ordered	Quantity Outstanding	Quantity Executed	Price (\$)	Expiry Date	Status	Actions
22/08/2022 5:51 PM	ZGGWN-W	Buy	BHP	100	100	0	40.000	12/09/2022	Review	Actions ▾

1 result found

Information on this page is periodically archived. Depending on your trading volume, you will be able to view up to 2 months order history. All holdings, financial transactions and confirmations are accessed from the **Portfolio** section. If you require a copy of your archived order history, [contact us](#).

- > View
- > Amend
- > Cancel

Example only:

Cancel Order

If this cancellation instruction is received outside of ASX market hours while a previous accepted amendment instruction has not been processed, this cancellation instruction will take effect on the unprocessed amendment and not your original order. Should you wish to cancel your original order, submit your current instruction and return to the Manage Orders page and cancel the original order.

 Your order will be cancelled.

Account: 6617925 - ML - MR DARRYL BOW

Order Type: **BUY**

Code: BHP

Description: BHP GROUP LIMITED FPO (ORDINARY FULLY PAID)

Price Limit (\$): At Limit (40.000)

Quantity Ordered: 100

Expiry: Good until expiry (12/09/2022)

To proceed with this instruction please check all details carefully and select 'Cancel Order'. Note that this instruction will be actioned on the market only when trading in the security is open.

Order Confirmation Notes

You will be provided an order confirmation note for each executed trade. The confirmation note provides all details of the executed trade and should be retained for your records. Confirmation notes will be sent to you by email or post, depending on your nominated preference. Please note that posted paper order confirmations attract a \$2.00 fee per confirmation note. Confirmation notes sent to you via email (up to six email addresses) are provided at no cost. You can update your confirmation note preference by navigating to **My Account > My Portfolio > Holdings & Accounts**, clicking on the **Account Details** tab and locating the **Confirmations** section.

Confirmations

You will be charged \$2.00 per paper Confirmation.

Receive the original confirmation by email and up to five copies (Note: this is a free service).

Original Confirmation Preference: Email Paper

Free Trading Tools and Research

The Westpac Share Trading platform provides a comprehensive range of free trading tools designed to suit most traders and investors. To complement these tools we also provide you with Morningstar investment research which includes detailed analysis of markets, sectors and companies, forecasts and stock recommendations.

To assist you with your trading, Westpac Share Trading offers:

- **Live Pricing** – including market depth across Australian shares, ETFs, options and warrants;
- **Watchlists** – you can keep an eye on stocks you are interested in by setting up personal watchlists;
- **Alerts** – we'll watch the market for you and let you know if a stock trades at a certain price;
- **Easy to use trading tools** – including key company metrics, dividends, historical prices and advanced charting;
- **The latest news feeds** – providing company announcements, pre-market, intra-day and post-market commentary including video reports
- **Research and recommendations** – from Morningstar, providing detailed analysis of markets, sectors and companies, including forecasts and stock recommendations.

Live pricing.

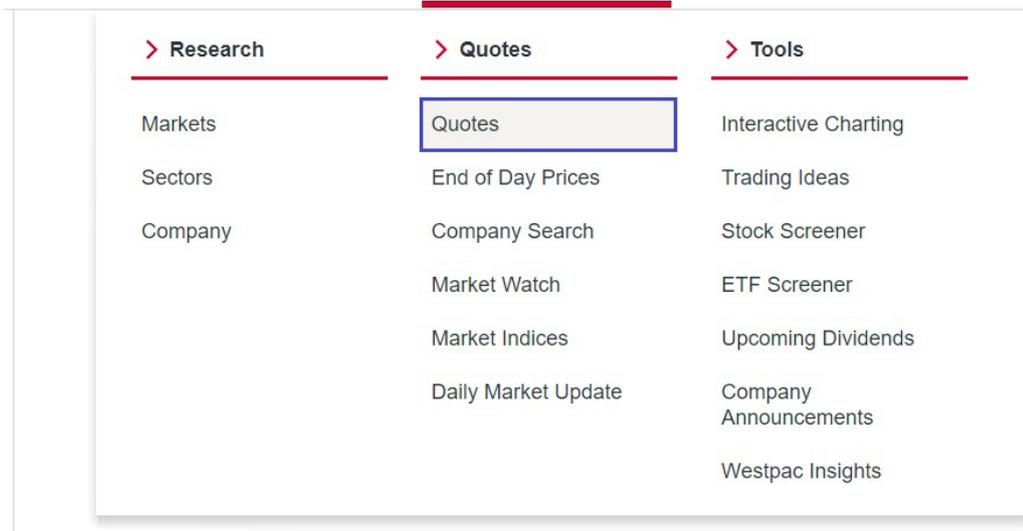
There are two ways to view the current price of a security:

- 1 You can quickly and easily obtain a price quote by using the Quick Quote search feature found in the top right corner of most pages on our site. Simply enter the ASX code or security name to start searching.



- 2 Click on the **Quotes & Research** navigation menu and select **Quotes**.

Home My Account Watchlists **Quotes & Research** Trading Products & Services



Enter the ASX code or security name to find all related securities. Click on the required security to view.

You are here: Quotes & Research > Quotes

Quotes



Code:



The last traded price of the security will be displayed together with its Market Depth. The Market Depth shows a summary of all buy and sell orders that are currently queued in the market, allowing you to see the number of shares and the maximum and minimum prices buyers and sellers are prepared to pay or sell their shares.

Example only:

Quotes & Research > Quotes



Quick Quote or Search

Quotes

- Quotes & Depth
- Course Of Sales
- Option Series
- Announcements
- Company Research
- Trade History
- Charts

Code:

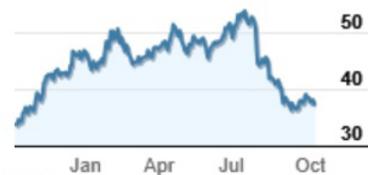
Open in new window

BHP \$37.080 ▼ \$-0.580 (-1.54%) [Add to Watchlist](#) | [Add to Alerts](#) | [Manage Orders](#)

BHP GROUP LIMITED FPO (ORDINARY FULLY PAID) Thu 28 Oct 2021 3:09 PM (Sydney time)

Share Quote								
Bid (\$)	Offer (\$)	High (\$)	Low (\$)	Volume	Trades	Value (\$)	Open (\$)	Previous Close (\$)
37.080	37.090	37.600	37.060	3,554,647	24,934	132,512,968	37.330	37.660

Date Range: [1d](#) | [5d](#) | [1m](#) | [1y](#) | [5y](#)



Market Depth							View: Price Detail Order Detail	
Buyers			Sellers					
No.	Volume	Price (\$)	Price (\$)	Volume	No.			
24	7,764	37.080	37.090	222	5			
14	8,460	37.070	37.100	4,394	25			
15	6,939	37.060	37.110	4,835	15			
20	6,249	37.050	37.120	2,742	11			
8	2,035	37.040	37.130	2,686	8			
10	5,044	37.030	37.140	3,487	10			
10	6,682	37.020	37.150	2,899	12			
26	12,504	37.010	37.160	2,225	10			
371	133,584	37.000	37.170	1,860	8			
8	3,766	36.990	37.180	2,984	6			
3,008 buyers for 1,181,415 units			1,150 sellers for 999,700 units					

Share Details	
52 Week High (\$)	54.550
52 Week Low (\$)	33.730
Last Traded	28/10/2021 3:09:44 PM
Trading Status	Normal
Market Status	Normal

Market Indices		
Index	Value	Change
▼ All Ordinaries	7,729.300	-28.700
▼ ASX S&P		

On this page you can also view other price information. Click on the tabs labelled:

Course of Sales to view a detailed list of all individual trades executed for this security today.

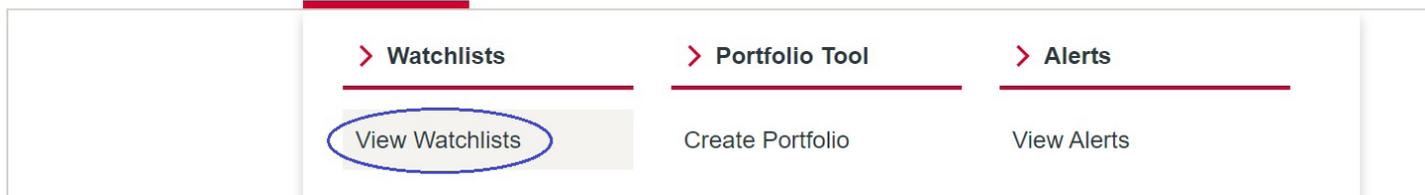
Trade History to view the daily open, high, low, close price and traded volume over the past 12 months.

Options Series to view the available exchange traded options and their current quotes.

Watchlists.

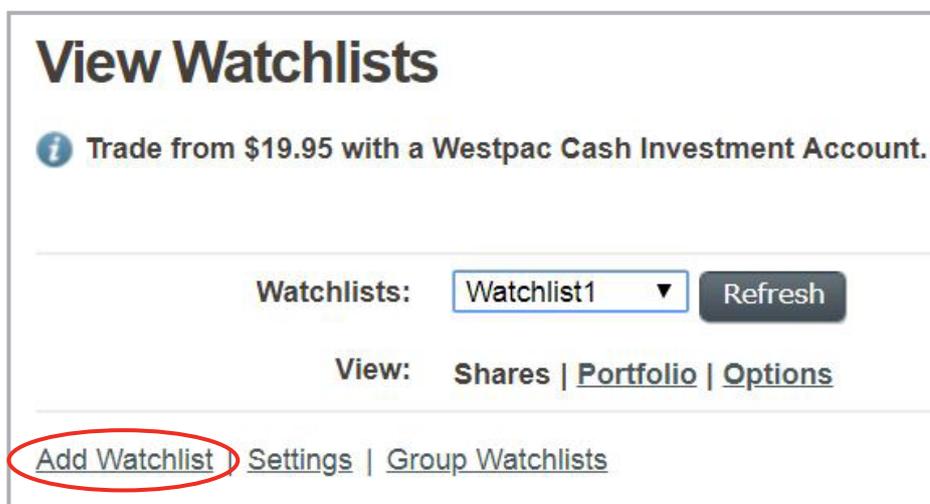
You can easily keep track of all stocks you are interested in by creating watchlists. You can create an unlimited number of watchlists. To get started simply click on the **Watchlists** navigation menu.

Home My Account Watchlists Quotes & Research Trading Products & Services Contact & Support

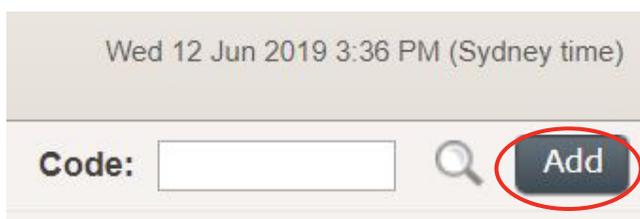


To create a watchlist click on 'Add Watchlist'.

Example only:



To add stocks to your watchlist simply enter the security code and click 'Add'.



Click on 'Edit' to give your watchlist a name, to add or remove stocks, or to add the purchase details of any stock you already own.

Example only:

The screenshot shows a watchlist table for mining stocks. At the top, there is a header 'Mining stocks' and a timestamp 'Wed 12 Jun 2019 3:39 PM (Sydney time)'. Below the header, there is a row of actions: 'Edit', 'Delete', 'Download', 'Launch Market Map', and 'Refresh'. The 'Edit' button is circled in red. To the right of the actions, there is a 'Code:' label, an input field, a magnifying glass icon, and an 'Add' button. Below the actions, there is a table with the following columns: Code, Bid (\$), Offer (\$), Last (\$), Change (\$), (%), Open (\$), High (\$), Low (\$), Volume, and Actions. The table contains two rows of data for BHP and RIO.

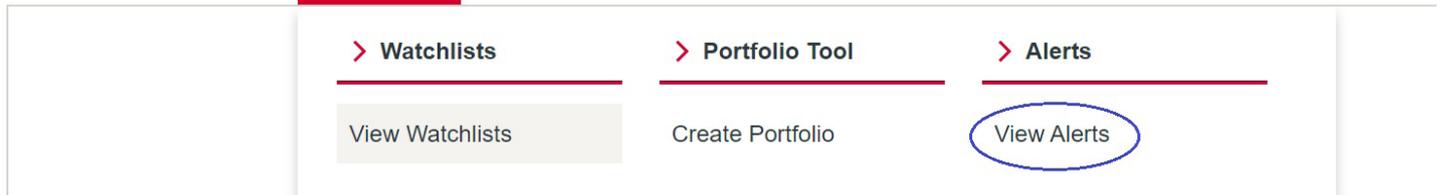
Code	Bid (\$)	Offer (\$)	Last (\$)	Change (\$)	(%)	Open (\$)	High (\$)	Low (\$)	Volume	Actions
▲ BHP	39.800	39.810	39.805	+1.105	+2.86	39.370	39.830	39.370	4,812,497	Buy Sell ▼
▲ RIO	102.620	102.630	102.620	+2.070	+2.06	102.100	103.000	101.830	1,107,445	Buy Sell ▼

Alerts.

To complement your watchlists we've created free and unlimited price alerts that can notify you when a stock has risen above or fallen below a certain price. You can even set up dividend and company announcement alerts. Alerts can be received via push notifications on your smartphone and via email.

To create an alert simply click on '**View Alerts**'.

[Home](#) [My Account](#) [Watchlists](#) [Quotes & Research](#) [Trading](#) [Products & Services](#) [Contact & Support](#)



Click the **Create** tab as per below, enter the code or security name, the alert type, the trigger price and your notification delivery preference. Click '**Add Alert**' to activate your alert.

[Create](#) [Manage](#) [History](#) [About](#)

Create New Alert Form

Select a company:

Select an alert type:

Enter trigger price:

Select delivery method(s): Push Notification Email

An alert will be sent when the stock price rises above a specified value. Please enter a trigger price that is above the current value of this stock.

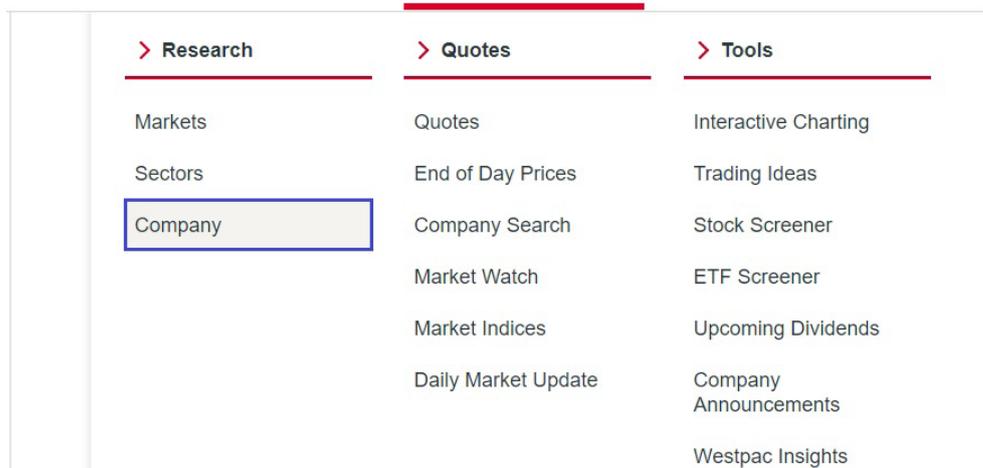
Please note: In order to receive push notifications, you must have the latest Westpac Online Investing app installed on your smartphone. Email notifications will be delivered to your preferred email address, which can be found in the My Profile section.

[Add Alert](#)

Company Information.

To find a range of information about a particular company navigate to **Quotes & Research > Research > Company**.

[Home](#) [My Account](#) [Watchlists](#) [Quotes & Research](#) [Trading](#) [Products & Services](#)



Enter the company code or name in the search field to view a summary of the security.

Example only:

Q Search by name or code for Security Research

↻
⚙️
🖨️

BHP Group Ltd (ASX: BHP)

Share: [Materials](#) / Materials

Last Price **\$37.020** Today's Change **▼ -0.640 (-1.70%)**

As of 28 Oct 2021, 4:10pm AEDT. (Data sourced from ASX TradeMatch only.)

Open (\$)	37.330
High (\$)	37.600
Low (\$)	37.000
Previously Closed (\$)	37.660

Bid / Size: 37.010 / 5,880

Offer / Size: 37.040 / 47,000

Volume: 6,141,262

52 Week High: 54.550

52 Week Low: 33.730

Last Traded: 28/10/2021 16:10:41 PM

Buy

Sell

▼

Summary

[Announcements](#)

[Charting](#)

[Dividends](#)

[News, Research & Recommendations](#)

[About](#)

[Forecasts & Trends](#)

[Trading Ideas](#)

[Financials](#)

[Derivatives](#)

On this page you will find a variety of options that will allow you to view the latest company announcements, advanced charts, dividend history, research and recommendations, forecasts, and the latest financials.

Current Stock Recommendations.

Our trading platform provides you with Morningstar investment research which includes their latest stock recommendations.

To see Morningstar's current recommendations for a security click on the **Trading Ideas** tab located under **Quotes & Research > Research > Company**.

Example only.

Summary

[Announcements](#)

[Charting](#)

[Dividends](#)

[News, Research & Recommendations](#)

[About](#)

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Trading Ideas

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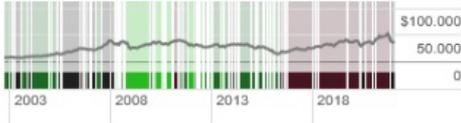
Overview

[Company Comparison](#)

Morningstar™ Premium Recommendation ⓘ

Hold on 19/08/2021

Previously Reduce on 18/08/2021

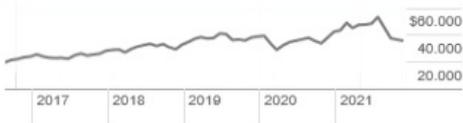


▶ [Go to full recommendation](#)

Morningstar™ Quantitative Recommendation ⓘ

Undervalued on 21/09/2021

Previously Fairly Valued on 02/09/2021

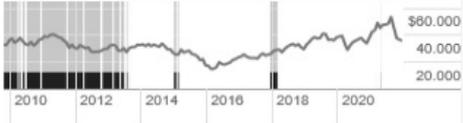


▶ [Go to full recommendation](#)

Consensus Recommendation ⓘ

Moderate Buy on 05/10/2020

Previously Hold on 08/07/2020



▶ [Go to full recommendation](#)

There are three types of stock recommendations - Morningstar Premium, Morningstar Quantitative and Consensus. Morningstar Quantitative Recommendations are generated by a statistical model that is based on Morningstar's analyst-driven equity ratings and quantitative statistics. Consensus Recommendations provides a view of the recommendations made by various brokers and research houses. Both Morningstar Quantitative and Consensus Recommendations are available at no cost to all customers.

To view the details of the recommendation simply click on **Go to full recommendation**. Here you can download Morningstar's reports and see their star rating and fair value estimate for the security.

Recent Morningstar™ Recommendations

	Recommendation	Date	Recommendation Report
	 Undervalued	26/10/2021 Current	Download 

Key Quantitative Values 26/10/2021

Quantitative Morningstar™ Rating



Fair Value Estimate



\$ 41.78 AUD

Morningstar Premium is designed for investors looking for more detailed information and is available by subscription. Morningstar Premium offers analyst recommendations for a wide selection of companies. Morningstar Premium provides in depth analysis, forecasts, detailed commentary by Morningstar's analysts on why a recommendation has been made, and access to a range of sophisticated tools including Morningstar's Model Portfolio Tool. A Morningstar Premium subscription costs \$20 per month, however will be fully rebated if you settle two or more trades or pay \$50 or more in brokerage in the same month.

To subscribe to Morningstar Premium, simply click on the **Subscribe Now** button or navigate to **My Account > My Profile > Alerts & Subscriptions**, and locate **Advanced Package**.

Advanced Package

Upgrade to the Advanced Package and receive Morningstar Premium Research (\$20 per month including GST. Rebate available for active traders).

Monthly Cost: \$20.00

[Subscribe](#)

Stock Screener

Stock Screener is an advanced research tool that can help you build a portfolio of stocks that meet your investment goals. No matter whether you're looking for yield, growth or value stocks, Stock Screener will help you find them using its pre-defined and custom search options.

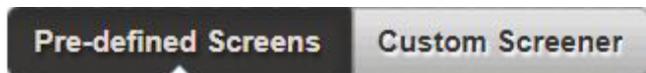
To get started navigate to **Quotes & Research > Tools > Stock Screener**.

Home My Account Watchlists Quotes & Research Trading Products & Services

> Research	> Quotes	> Tools
Markets	Quotes	Interactive Charting
Sectors	End of Day Prices	Trading Ideas
Company	Company Search	Stock Screener
	Market Watch	ETF Screener
	Market Indices	Upcoming Dividends
	Daily Market Update	Company Announcements
		Westpac Insights

Pre-defined Screens.

Our pre-defined screens will help you find stocks using pre-set criteria and parameters. Select Stock Screener's **Predefined Screens**.



Select the **Strategy Goal** that best suits your investing goals. For example select:

Growth – to find stocks with capital growth potential based on consistent earnings growth

Value – to find stocks that may be undervalued i.e. Price to Earnings ratio below the market average.

Yield – to find stocks with a dividend yield greater than the market yield (stocks in the ASX All Ordinaries index).

Once you've selected your **Strategy Goal**, select your preferred **Pre-defined screen**. Each Pre-defined screen uses a number of pre-set criteria and parameters.

Strategy Goal: Growth	Strategy Goal: Value	Strategy Goal: Yield
Pre-defined Screens: ✓ Affordable Quality Growth Undervalued Growth Stocks	Pre-defined Screens: ✓ Undervalued Stocks Undervalued Stocks Relative to H... Undervalued Growth Stocks	Pre-defined Screens: ✓ Blue Chip Income Stocks Cyclical Income Stocks

Once you select a pre-defined screen, the stocks that meet the pre-set criteria will be displayed on the page.

You can then change the displayed results by clicking on **View by** dropdown menu. You can also sort your results in ascending and descending order by clicking on the triangle that appears beside any of the column headings (see next page).

Example only:

Search for stocks

Select from a set of pre-defined screens to help find equities that may match your investing goals.

Strategy Goal:

Yield

Pre-defined Screens:

Blue Chip Income Stocks

30 Results

View by: Dividends

Code ▲	Div Yield ▼	Current Div. ▲	Div. Payout Ratio ▲	Franking ▲	1 Year Div. Growth Rate ▲
<input type="checkbox"/> AWC	12.70%	\$0.20	98.00%	100.00%	85.80%
<input type="checkbox"/> NAB	6.70%	\$0.83	85.00%	100.00%	0.00%
<input type="checkbox"/> WBC	6.70%	\$0.94	81.00%	100.00%	0.00%
<input type="checkbox"/> FMG	6.50%	\$0.60	62.00%	100.00%	-47.50%

Custom Screener.

You can also customise your stock search by setting your own search criteria using any combination of the 47 search criteria available.

Simply click on **Custom Screener** and then the **Add More Criteria** button.

Pre-defined Screens

Custom Screener

Select Screener Criteria

Add More Criteria

Select each criteria you would like to use to filter your search and then click the **Close** button.

Additional Criteria

X

Base Criteria:

- Market Cap
- Sector
- Price
- Options Available
- Warrants Available

Dividends:

- Dividend Yield (%)
- Current Dividend

Performance vs ASX200:

- Price Performance compared to the ASX200
- Beta

Performance vs Sector:

- Price Performance compared to the company's Sector

Technical:

- Moving Average Crosses
- Price vs. 10 day SMA

Your selected criteria will now appear down the left side of the page. You can then further customise your search by adjusting the parameters of each criteria. For example in the example on the next page, you can just select those sectors you are interested in and you can select the range for other criteria by simply adjusting the minimum and maximum values or moving the red sliders.

- Base Criteria:

Sector ✕

Communication Services

Consumer Discretionary

Consumer Staples

Energy

Financials

Healthcare

Industrials

Information Technology

Materials

Real Estate

Utilities

- Dividends:

Dividend Yield (%) ✕



- Valuation:

Price-Earnings Ratio (P/E) ✕



Customer Support

Learn & Support.

Westpac Share Trading is committed to supporting both new and experienced investors and has developed **Education Hub**. **Education Hub** is an invaluable resource that will help you learn more about the Australian sharemarket. It also provides various guides and videos to help you navigate and take advantage of the many features offered within the Westpac Share Trading platform. **Education Hub** can be found in the **Contacts and Support** menu under **Learn & Support**.

[Quotes & Research](#) [Trading](#) [Products & Services](#) [Contact & Support](#)

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Education Hub

Learning and Resources



Webinars

Access our Trading and Research Video Tutorials and previous Webinars.

> Watch the webinars

Resources

Articles, user guides and videos to help you learn more about the Share Market and your Westpac Share Trading account.

> Check our resources



FAQs

Looking for answers to your general Share Trading enquiries, visit our FAQs page.

> Get some answers



Westpac Insights

Our in-depth resource hub, keeping you up to speed with the latest economic and financial market news and updates.



Forms

If you need to update your details, transfer shares, access various Westpac Share Trading applications or simply view important documents.



Site News

View the latest announcements relating to site upgrades and new features, as well as topical market and regulatory news.

Frequently Asked Questions.

If you can't find what you're looking for here, you can also visit our FAQs page which covers a comprehensive range of topics.

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FAQs

- All Categories
- Getting Started
- My Account
- Dividend Direction Service
- Trader Pro technical
- Research
- Rewards
- EOFY Statements
- Financial Difficulty

[Clear Search](#)

Getting Started

How do I trade with Westpac Share Trading?	▼
What is the difference between CHESs sponsored and Issuer Sponsored?	▼
Will my orders go straight through to the market?	▼
What type of orders can I place?	▼

For more details, refer to 'Terms and Conditions' and 'Westpac Cash Investment Account Terms and Conditions' located on the [homepage](#).

Still didn't find what you're looking for?

Help is never far away. If you have a question or require assistance with any aspect of our trading platform please contact the Westpac Share Trading customer service team.

We're here to help

📞 13 13 31
8am to 7pm (Sydney time) Monday to Friday

✉️ securities@westpac.com.au

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We're here to help

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Things you should know: This information has been prepared by Westpac Securities Limited, ABN 39 087 924 221, AFSL 233723 ("Westpac Securities") and Australian Investment Exchange Limited, ABN 71 076 515 930, AFSL 241400 ("AUSIEX") is current as at 15 February 2023.

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