


# E-Learning Portal Walkthrough for Retail Customers and Investors



# Step 1: Create A New Account

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## Contracts for Difference

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### Welcome to the E-Learning Portal for Investors

This e-learning portal on Specified Investment Products (SIPs) is jointly developed by The Association of Banks in Singapore (ABS) and Securities Association of Singapore (SAS). The objective of this portal is to help investors make informed investment decisions through the understanding of the SIPs' features, risk and suitability before deciding to invest in them. The portal is available to all investors in Singapore at no charge.

### Device Compatibility

Due to the recent updates on Chrome, Internet Explorer, Firefox, and Safari, older devices will not be compatible with the E-Learning Portal. Please be advised not to use the following devices:

- iPad, iPad 2, iPad (3rd Generation), iPad (4th Generation)
- iPad Air
- iPad Mini through iPad Mini 3

For best compatibility, please use Chrome or Firefox in Windows, or Safari in MacOS.

#### Course Modules

Five modules of the SIPs are offered on the e-learning portal as follows:

1. Contracts For Difference;
2. Foreign Exchange Margin Trading;
3. Structured Deposits and Dual Currency Investments;
4. Structured Products;
5. Unit Trusts and Investment-linked Insurance Policies.

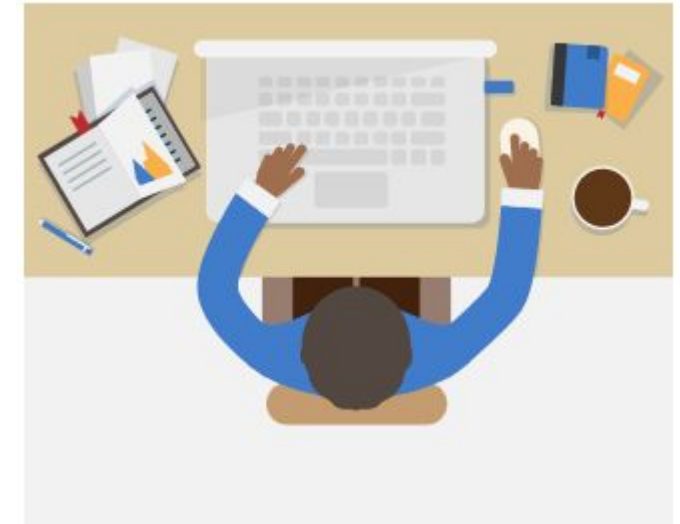
#### Login

Email Address

Password

**LOG IN**

[New User?](#) [Forgot Password?](#) [Get New OTP](#)



1. Click **HERE** to access the E-Learning Portal
2. Click on **New User**

# Step 2: Registration of New User

Welcome to the E-Learning Portal for Investors

Welcome to the E-Learning Portal for Investors

**Registration**

Fields marked with (\*) are mandatory

Email Address \*  (Please use a unique valid email address. This email will be used as your login name and to send the OTP plus certificate copy upon completion of the Course.)  
(Note: only one registration is permitted per email address.)

Type \*

NRIC/FIN/Passport No \*  (For example NRIC/FIN S1234567A enter 567A or Passport PA987654321 enter 4321)  
4 characters only (letters or numbers)

First Name \*

Last Name/Surname \*



Secret Question \*

Answer \*

Verification Code \*  (Not case sensitive)

I confirm that as the registered user, I will be the party taking the assessment at the end of each module.

I accept the terms and conditions. [Terms & conditions](#)


1. Fill in your personal particulars
2. Read & Tick BOTH checkboxes
3. Click “Submit”



# Step 3: Enter One-Time-Password (OTP)

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Welcome to the E-Learning Portal for Retail Customers and Investors

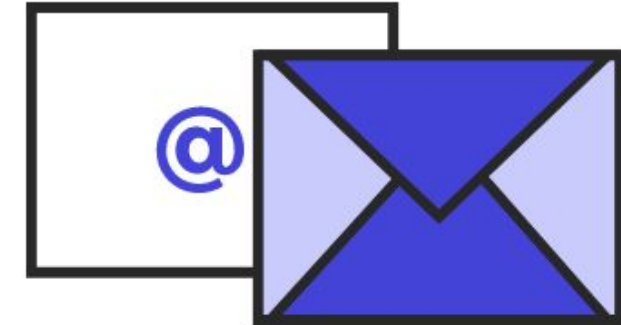


**Enter your OTP**

Fields marked with (\*) are mandatory

If you encounter any issues with OTP, please contact us, mailto : [support@abslmssupport.biz](mailto:support@abslmssupport.biz)

Enter your OTP \* :  



1. One time password will be sent to your email.
2. Enter OTP and click **“Submit”**.

# Step 4: Create NEW Password

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Last login : \_\_\_\_\_

## Welcome to the E-Learning Portal for Retail Customers and Investors



**New User?**

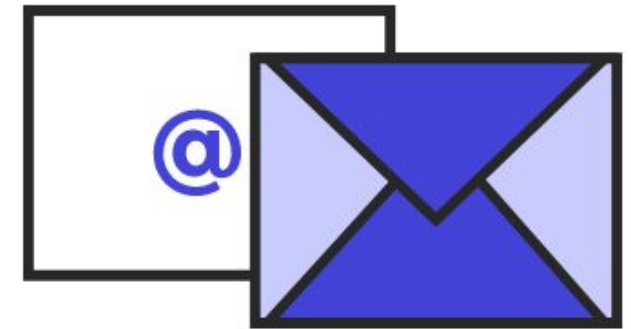
### Change password

Fields marked with (\*) are mandatory

Old password (OTP) \*

New password \*  (Minimum 6 characters, only numbers and alphabets are accepted.)


Confirm password \*



1. Fill in your OTP followed by your new password
2. Click **“Submit”**

# Step 5: Login with your New Account

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## Contracts for Difference

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#### Login

Email Address

Password

**LOG IN**

[New User?](#) [Forgot Password?](#) [Get New OTP](#)

1. Login using your username and **NEW** password
2. Click “**Login**”

# Step 6: Objective of E-Learning

## Objective of the E-Learning Portal!

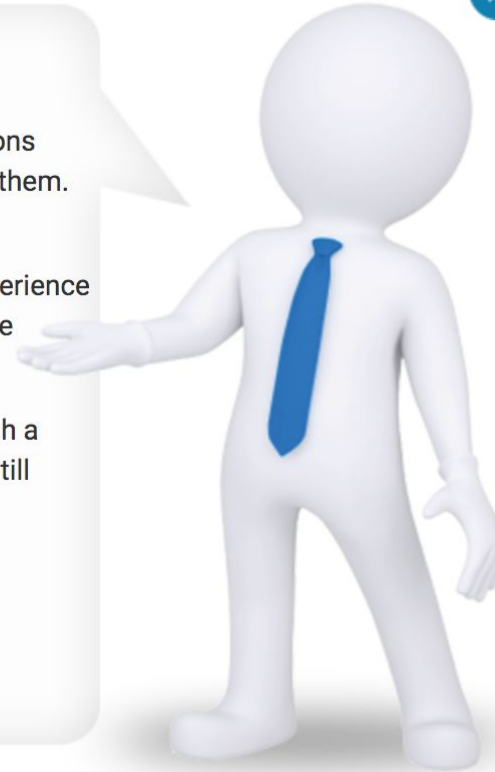
The e-learning portal is to help retail customers and investors make informed investment decisions through the understanding of the SIPs' features, risks and suitability before deciding to invest in them.

By taking and passing the assessments on the e-learning portal, a customer who was originally assessed by a financial intermediary to not possess the required qualification, knowledge or experience to invest in SIPs under the CKA framework, may be considered by a financial intermediary to have obtained the required knowledge to invest in SIPs.

However, the e-learning is not intended to substitute or replace the CKA requirement. Even though a customer may have taken and passed the e-learning assessments, financial intermediaries are still required to conduct the CKA on a customer to assess whether the customer has the required qualification, knowledge or experience to invest in unlisted SIPs.

Check this box if you don't want to see this message again

[Click here](#) to close this window and start using this website.



1. Read through the Objective of e-Learning Portal
2. Check the checkbox if you do not wish to see this again
3. Click on "**Click here**" or the "**X**" to close the pop-up



# Step 7: Choose your course

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Last login : Jul 8 2020 5:18PM

## Welcome to the E-Learning Portal For Investors

### Course Catalogue

#### Device Compatibility

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#### Contracts for Difference (CFDs)

Contracts for Difference (commonly known as "CFDs") are derivative products and the trading of the CFDs involves two parties - the buyer and the seller. The buyer or seller, each with a view of the market, takes a position on asset price movements without owning the underlying asset.

Attempts : 0 / Unlimited      Status - Not Started

[LAUNCH COURSE](#)

#### Foreign Exchange Margin Trading

Most banks and brokers in Singapore offer their customers foreign exchange (FX) margin trading facilities. As FX margin trading is a financial product which is speculative in nature, it is important that you understand the nature of the risks involved. To start trading in the foreign exchange markets with financial institutions in Singapore, you will have to set up a Foreign Exchange Margin Trading Account.

Attempts : 0 / Unlimited      Status - Not Started

[LAUNCH COURSE](#)



1. Choose the Course that you would like to attempt
2. Click on **“Launch Course”**



# Step 8: Attempt the Quiz Questions

Are you ready to take the quiz now?

The quiz is to confirm your understanding of **Contracts for Difference (CFDs)**.

If you pass the quiz, you will be issued with a certificate that you can show your financial advisor that you have passed this module.

## Quiz Instructions

**NOTE** once you start the Quiz you are unable to go back to the course content. To review course content you will have to retake the course.

- 1) You are required to answer 15 questions in the quiz.
- 2) You must select an answer before proceeding to the next question.
- 3) Once an answer is submitted you are unable to go back to change your answer.
- 4) There are two possible question types.

### Multiple Choice

Click on the radio button to indicate your choice.  
Only one answer is to be selected for such a question.

### True or False

Click on the radio button to indicate your choice.

- 5) If you use a wheel button mouse, take care not to accidentally change your answers. Sometimes scrolling the wheel may rotate through the answers in the selection list instead of scrolling down the page.
- 6) You will be shown your results, including the scores at the end of the quiz. If you passed the quiz, you may wish to print the certificate for your record. Alternatively you can request a copy to be emailed to you.

Accept & Start Quiz

Slide 34 of 49

BACK <



At the end of the e- Learning, Click on “Accept & Start Quiz”

# Step 9: Review Your Results



Thank you for taking time to complete this quiz.

We hope you have found the **Contracts for Difference (CFDs)** useful.

## Quiz Results

You have **Passed** this Quiz.

You have answered **15** questions correctly. Your score is **100%**

Please close this window and download your certificate.

Review Quiz




1. Upon completion of the Quiz, Click on “**Review Quiz**” to review question you answered wrongly.
2. Click on “**X**” once done

# Step 10: Download your Certificate

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Last login : Jul 2 2014 9:58AM

## Welcome to the E-Learning Portal for Retail Customers and Investors



### Course Catalogue

» **Contracts for Difference (CFDs)**

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Attempts : 1 / Unlimited      Status - Pass      Last attempted date - Jul 2 2014 10:28AM

[Download](#)

*You have successfully completed the course. However, if you wish to access the course again, Please click on the "[Launch Course](#)". Please note that if you retake the quiz at the end, only your most recent result is stored.*

» **Foreign Exchange Margin Trading**

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Attempts : 0 / Unlimited      Status - Not Started

[Launch Course](#)



1. Click "Download"

# Disclaimer

This material is provided to you for general information only and does not constitute a recommendation, an offer or solicitation to buy or sell the investment product mentioned. It does not have any regard to your specific investment objectives, financial situation or any of your particular needs. Accordingly, no warranty whatsoever is given and not liability whatsoever is accepted for any loss arising whether directly or indirectly as a result of your acting based on this information.

Investments are subject to investment risks. The risk of loss in leveraged trading can be substantial. You may sustain losses in excess of your initial funds and may be called upon to deposit additional margin funds at short notice. If the required funds are not provided within the prescribed time, your positions may be liquidated. The resulting deficits in your account are subject to penalty charges. The value of investments denominated in foreign currencies may diminish or increase due to changes in the rates of exchange. You should also be aware of the commissions and finance costs involved in trading leveraged products. This product may not be suitable for clients whose investment objective is preservation of capital and/or whose risk tolerance is low. Clients are advised to understand the nature and risks involved in margin trading.

You may wish to obtain advice from a qualified financial adviser, pursuant to a separate engagement, before making a commitment to purchase any of the investment products mentioned herein. In the event that you choose not to obtain advice from a qualified financial adviser, you should assess and consider whether the investment product is suitable for you before proceeding to invest and we do not offer any advice in this regard unless mandated to do so by way of a separate engagement. You are advised to read the trading account Terms & Conditions and Risk Disclosure Statement (available online at [www.poems.com.sg](http://www.poems.com.sg)) before trading in this product.

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*Thank you*