

Sanlam iTrade – Products and Services

www.sanlamitrade.co.za

These videos explain the Sanlam iTrade website and show how it looks inside:

- [Introduction to the Sanlam iTrade website – the landing page.](#)
- [Inside the Sanlam iTrade login.](#)
- [The live portfolio and trading pages.](#)

1. Trade JSE shares and instruments on our advanced Iress platform:

The screenshot displays the Sanlam iTrade trading interface. At the top, there's a navigation bar with 'Pricing', 'Orders', 'Portfolio', 'CFD Reports', and 'User'. Below this, the 'Intraday Portfolio' section shows a 'Gross Exposure' of 651,775.10. The main area is split into three parts: a 'Holdings' table, a 'Quote' table, and a 'Create Buy Order' dialog box. The 'Holdings' table lists various securities with their respective prices and volumes. The 'Quote' table shows real-time market data for selected securities. The 'Create Buy Order' dialog box is open, showing details for a buy order on SLM JSE (Sanlam Limited), including bid and ask prices, order volume, and pricing instructions.

- Secure, fast online trading with more than 98% uptime at very competitive costs. (See [Our Costs](#))
- State-of-the-art Iress platform which you can customize to your requirements.
- Trade any JSE listed instrument: shares, ETFs, ETNs, warrants.
- Live prices with market depth (5 best Bids and Offers).
- For immediate execution we have Direct Market Access (DMA).
- Price alerts sent via e-mail or SMS for up or down triggers.
- Stop-loss orders to protect your portfolio from sudden downward movements.

2. Trade CFDs on JSE shares:

You can trade CFDs on JSE shares on the same Iress trading platform you use for trading shares, just select the CFD account.

Create Sell Order
✕

General

Account:

Security Code:

Security Description:

BidVol	Bid	Ask	AskVol	Last	Delay
1,191	6708	6723	1,209	6717	-

Initial Margin: 15%
 Margin Lot Size: 1
 Short Sell (Y/N): Y

Order Volume: (shares)

Order Price:

Pricing Instruction:

Lifetime:

ExpiryDateTime:

Password:

Order Summary

Trade Value: 67 080.00
 Initial Margin Est: 10 062.00

- Traders trade CFDs because of lower costs (0.35% vs 0.5%) as well as gearing and short selling
- Whilst some competitors quote their own bids and offers on CFDs, with iTrade you trade the JSE spot price for a CFD, assuring that you get the “true” market price. This protects clients from misleading quotes made by some trading platforms.
- Not only do we empower you to trade at the exact JSE price, but our fees are also listed separately, which means we’re fully transparent.
- Set stop-losses to protect your portfolio from sharp declines.
- If your margin falls below pre-determined levels, we will automatically close positions to maintain the margin.
- For more info [click here](#).

3. Trade on your Mobile:



- You can view your portfolio and watchlist on IOS or Android devices by downloading the Iress app.
- View market information and SENS news.
- Place and manage orders to buy or sell shares or local CFDs as well as stop-loss orders.

4. Trade the world on iTradeGlobal.



Access worldwide trading & investing opportunities from any device 24/7

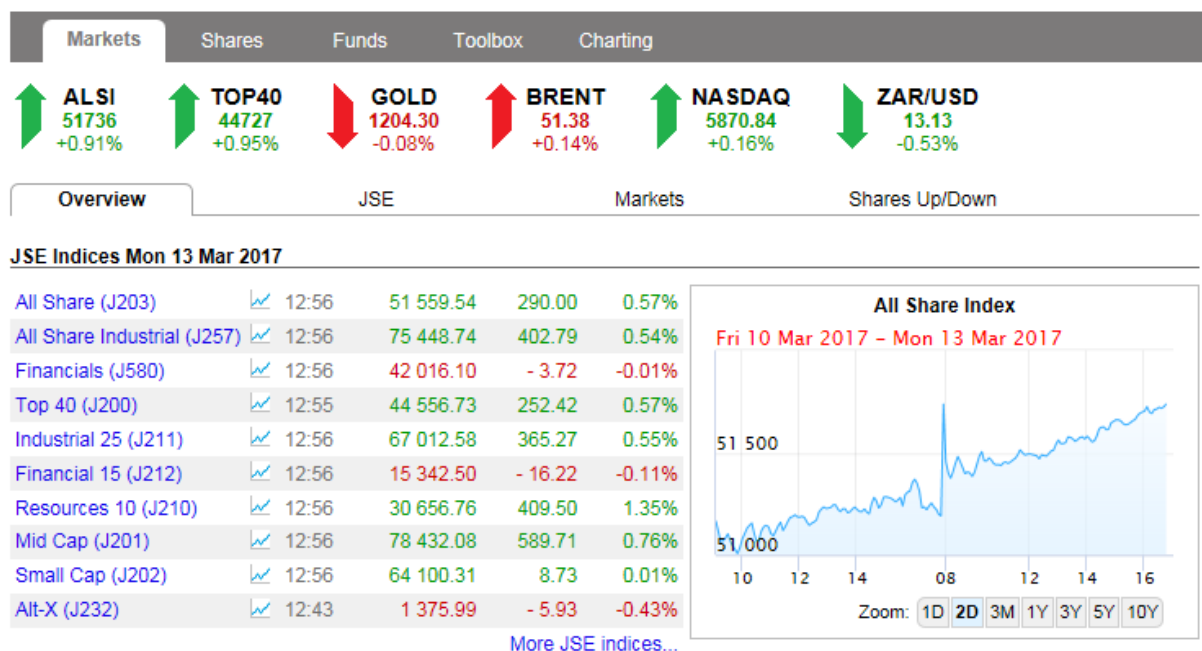
What does iTradeGlobal offer:

- Access your multi-asset account from your desktop or from anywhere on the Internet or your mobile. Fast and simple cross-device experience.
- Trade Equities (EQ), Exchange Traded Funds (ETFs) and Exchange Traded Commodities (ETQs) on all major markets worldwide.
- Broking fees around 0.35%. [Click here](#) for a list of available exchanges, commissions and minimums.
- Free live prices for most European markets. [Click here](#) for all live price costs.
- Advanced Charting with Technical Analysis Tools - **Free**
- Market News - **Free**
- Auto-generated monthly account reports - **Free**
- Low access fee for Equity Research. Only EUR 1.99 p m:
 - Detailed company information on over 11,000 Stocks worldwide
 - Consensus analyst recommendations
 - Detailed valuation measures including forward-looking multiples
- You can use your own foreign allowance of R10m or Sanlam's Asset Swap.
- Minimum investment is R100,000.



5. Comprehensive information and functionality on the iTrade website:

- **Daily** market commentaries and analysis.
- **Intra-day** tables with graphs of market indicators like JSE Indices, Global Indices, Currencies and Commodities.
- **Comprehensive** end-of day charts of all JSE shares, JSE Indices, Currencies, Global Indices and Commodities with technical analysis tools like Moving Averages, Stochastics, MACD, RSI, etc.
- **Comprehensive** share data on every listed share including 10 years of financial statements, annual company reports, consensus broker forecasts with 3 years' forecast HEPS, detailed fact sheets and performance statistics, a searchable SENS News archive and much more.



- **Research** on most Top 100 companies as well as some smaller shares. [Example of Research](#)
- **Live JSE SENS news** enables you to know sensitive news at the same time as any stockbroker on the JSE.
- **Watchlists** and price alerts to keep on top of shares you own or want to own.
- **Learning centre**, the **Shares Made Simple** online education course and a Virtual Trade Simulator so you can gain experience without risk.
- Visit us on www.sanlamitrade.co.za.

6. Competitive costs:

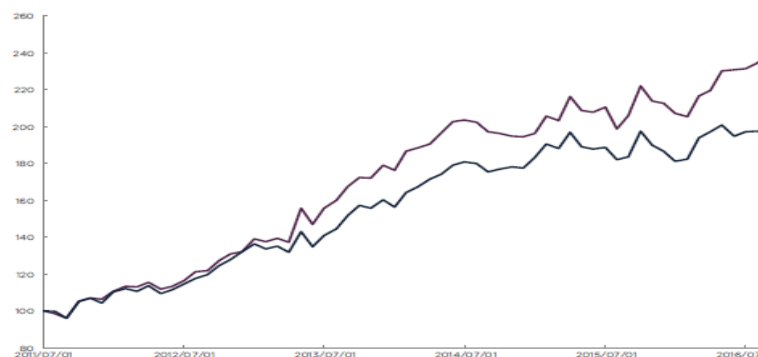
- **Broking fees** start at R75 basic fee plus 0.5% of the value of the trade and lower for big trades. For a breakdown of all costs [click on Our Costs](#).

- **Monthly fees** are R50 plus VAT and include website use and admin costs as well as 150 free live prices. The monthly fee is waived if you trade more than R300 in broking fees in a month. Many of our clients never pay any monthly fees.
- **iTradePro** is for more active traders with unlimited live prices on their portfolios, watchlists as well streaming. This costs an extra R80 plus VAT per month only.
- **CFD** costs are detailed on CFD trading webpages with broking fees at 0.35% plus R50 basic. There are no extra monthly fees for CFDs.
- **iTradeGlobal** costs are on the website [click on Our Costs](#).

7. iManaged – Managed Portfolios:

- iManaged portfolios are individual share portfolios, not unit trusts. Individual shares are registered directly in the client’s name, providing ownership and full JSE protection under the JSE Fidelity Fund.
- Distinct from the bespoke personalised portfolios offered by SPW to clients investing over R1million, the iManaged portfolios are not individually-tailored, but are strictly managed according to model portfolio guidelines. Clients therefore benefit from access to the expertise, experience and excellent track record of the SPW investment team.
- A client may at any stage change his or her account status to self-manage the portfolio. There will be no cost to do this as the shares are already in the client’s BDA Account with the JSE.
- Two iManaged portfolios are available:
 - **General Equity Portfolio**
 - **Dividend Income Portfolio**
- The minimum investment is R200,000 and portfolio management fees are 1.5% per year, calculated monthly on the value of the portfolio. There is also a small R300 per year custodian fee. Transaction costs are kept in line with iTrade’s low fee structure, see “Our Costs” on the website.

Performance



Performance Figures

(1,2 and 3 years annualised to 31 March 2017)

	1 Year	2 Year	5 Years
iManaged General Equity portfolio	16.62%	11.43%	17.43%
FTSE/JSE All Share Index	2.53%	2.85%	12.49%

- For more information on iManaged portfolios [click here](#).

8. Social Media:

- Sanlam iTrade is the leader in social media in the online trading sector with more than 10,000 followers on **Facebook** and 3,000 on **Twitter** (@iSayiTrade). The iSayiTrade Blog provides excellent education and market analysis. Sanlam iTrade is also active on LinkedIn, YouTube and Instagram.
- The **iTrade Fantasy League Portfolio** was probably a world first. Sanlam iTrade asked its Facebook fans to choose 20 shares and manage the portfolio for nine months. We invested R1m in the shares chosen and the portfolio outperformed the JSE All Share Index in 2013! The profit of R167,000 was divided between the winners of the competition and CHOC, the childhood cancer organization.



[Blog!](#)



9. Our service delivery highly rated by our clients:

- Sanlam iTrade won the **People's Choice Award** in the Business Day Investor's Monthly Stockbroker of the Year Awards twice already. Sanlam Private Wealth was also ranked the Top Wealth Manager three years in a row.
- In our own **Client Satisfaction Survey** more than 94% of our clients rated their overall experience with Sanlam iTrade as "Excellent" or "Good". Admin Service as well as IT Service was rated as excellent or good by well above 80% of our clients.
- More than **95%** of our clients rated the chances of recommending iTrade as excellent or good. We appreciate and acknowledge the feedback we get from our clients.

**Register today and start
experiencing Sanlam iTrade.**

You can register as an **iView** client first, free for the first month and only R200 per year after that. Most of the website functionality is made available to iView clients from time to time. To be able to trade you need to register as an iTrade or iTradePro client.

[Click here for the Sanlam iTrade Home Page.](#)