



asx.com.au: Investor Portal

User Guide

12 October 2020



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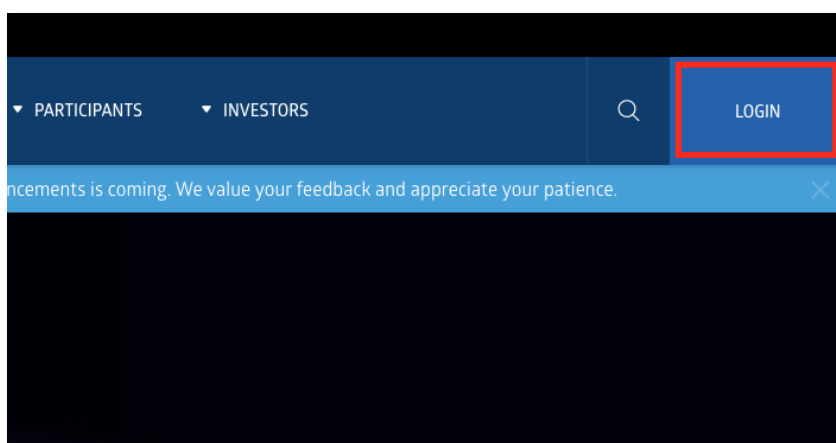
Registration

Step 1

Visit www.asx.com.au, you will find the ASX home page.

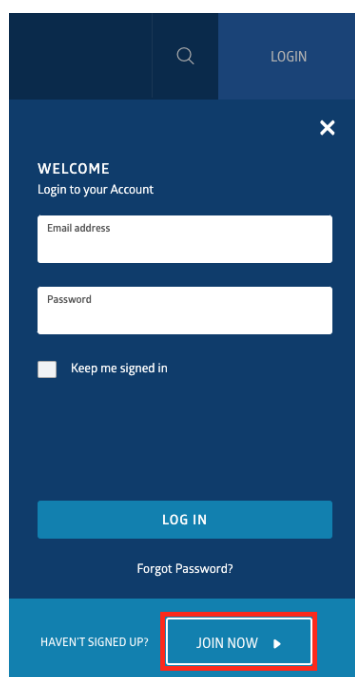
Step 2

Click on the 'LOGIN' button in the top right hand corner of the screen.



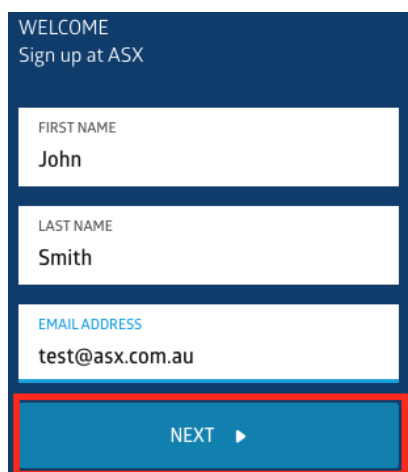
Step 3

Click 'JOIN NOW' (if you already have an account, please skip to the [Logging in for the first time](#) section)



Step 4

Enter your First Name, Last Name and Email Address in the empty fields and click '**NEXT**'



WELCOME
Sign up at ASX

FIRST NAME
John

LAST NAME
Smith

EMAIL ADDRESS
test@asx.com.au

NEXT ▶

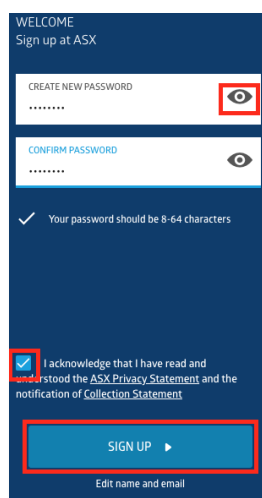
Step 5

Create a password, enter an identical password in both empty fields. To view the password you have entered to ensure they match, click on the icon of an eye on the right hand side of the password field.

Check the acknowledgement box and click '**SIGN UP**'.

Please note your password must adhere to the following conditions:

- It must be over 8 characters.
- It cannot be a common password such as 'password'.
- It cannot contain your email, given name, or family name.
- It cannot contain more than 3 consecutive identical characters.
- It cannot contain more than 3 consecutive sequential characters.



WELCOME
Sign up at ASX

CREATE NEW PASSWORD
.....

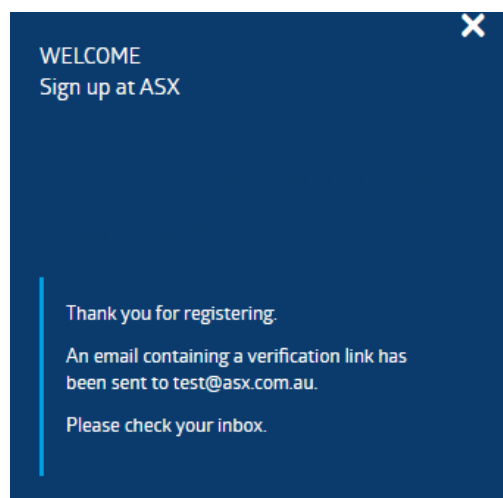
CONFIRM PASSWORD
.....

✓ Your password should be 8-64 characters

I acknowledge that I have read and understood the [ASX Privacy Statement](#) and the notification of [Collection Statement](#)

SIGN UP ▶

Edit name and email



WELCOME
Sign up at ASX

Thank you for registering.

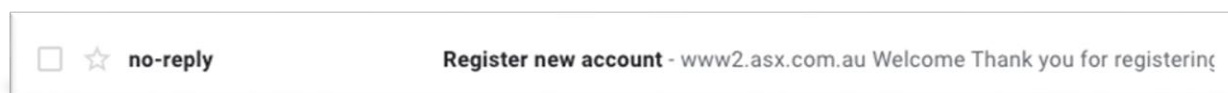
An email containing a verification link has been sent to test@asx.com.au.

Please check your inbox.

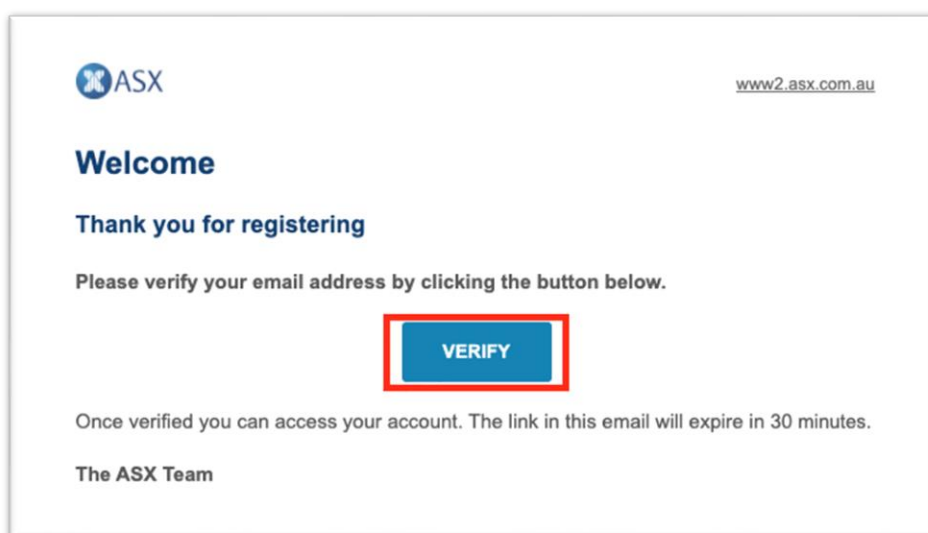
Step 6

Check the inbox of the email account you provided, you would have received a welcome email. Please refresh your inbox if you have not received this. Please check your spam or junk folders too.

If you do not receive a welcome email within 5 minutes of signing up, please proceed to sign up again.

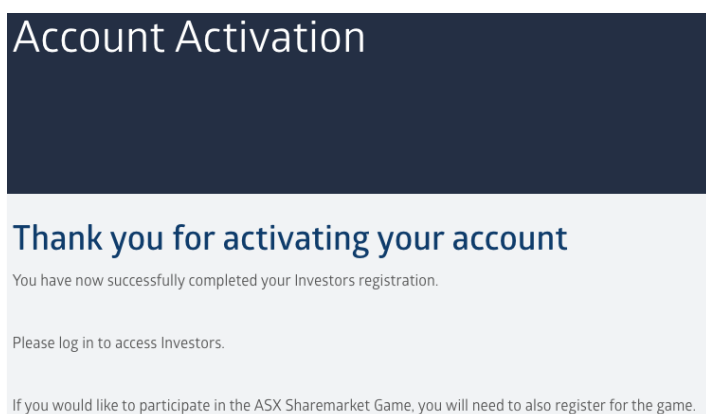


Open the email and click on the blue 'VERIFY' button.



Please note: this email is only valid for 30 minutes, if you fail to verify your account within 30 minutes of receiving the email, your account will be deleted and you will have to start from Step 1 again.

Upon clicking verify you will be met with an account activation webpage confirming your account creation is now complete.



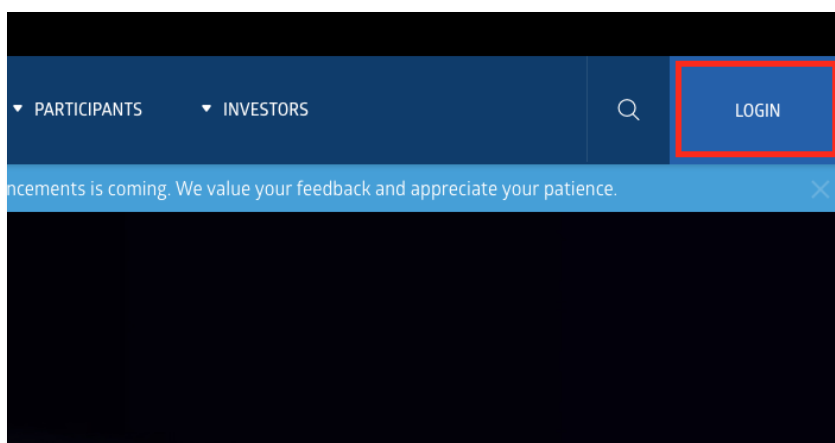
Logging in for the first time

Step 1

Visit www.asx.com.au, you will find the ASX home page.

Step 2

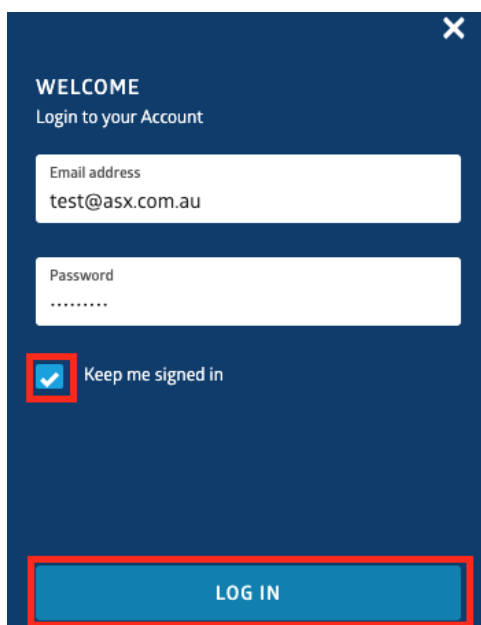
Click on the **'LOGIN'** button in the top right hand corner of the screen.



Step 3

Enter the email address used to register your account along with your nominated password, click **'LOG IN'**

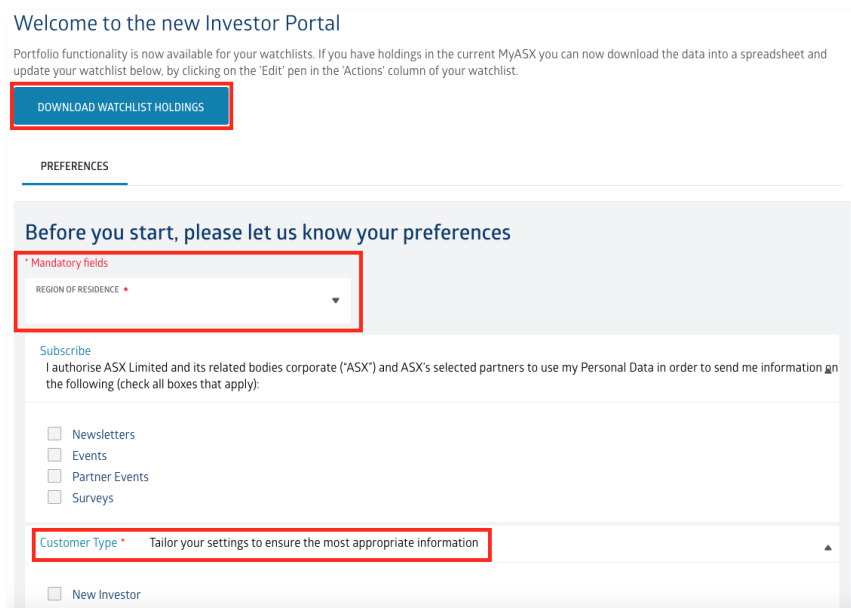
*Please note: check the **'Keep me signed in'** box if you wish to stay logged into the Investor Portal, if you do not select this, you will be prompted to log in every time you access your watchlists.*

A screenshot of the ASX login form. The form is dark blue with white text. At the top right, there is a close button (X). Below the header, there is a 'WELCOME' section with the text 'Login to your Account'. There are two input fields: 'Email address' with the value 'test@asx.com.au' and 'Password' with a masked password '.....'. Below the password field, there is a checkbox labeled 'Keep me signed in' which is checked and highlighted with a red box. At the bottom of the form, there is a blue button labeled 'LOG IN' which is also highlighted with a red box.

Step 4

Once you have logged in for the first time, you will be asked to update your preferences before continuing.

*Please note: the **‘DOWNLOAD WATCHLIST HOLDINGS’** button will download a .csv file to your device with the holdings you previously held in MyASX – ASX’s previous version of the Investor Portal. You will only find your holdings here if you are using the same email to log in to the new portal as you were the old.*



Welcome to the new Investor Portal

Portfolio functionality is now available for your watchlists. If you have holdings in the current MyASX you can now download the data into a spreadsheet and update your watchlist below, by clicking on the 'Edit' pen in the 'Actions' column of your watchlist.

DOWNLOAD WATCHLIST HOLDINGS

PREFERENCES

Before you start, please let us know your preferences

*** Mandatory fields**

REGION OF RESIDENCE ▾

Subscribe

I authorise ASX Limited and its related bodies corporate ('ASX') and ASX's selected partners to use my Personal Data in order to send me information on the following (check all boxes that apply):

- Newsletters
- Events
- Partner Events
- Surveys

Customer Type * Tailor your settings to ensure the most appropriate information ▾

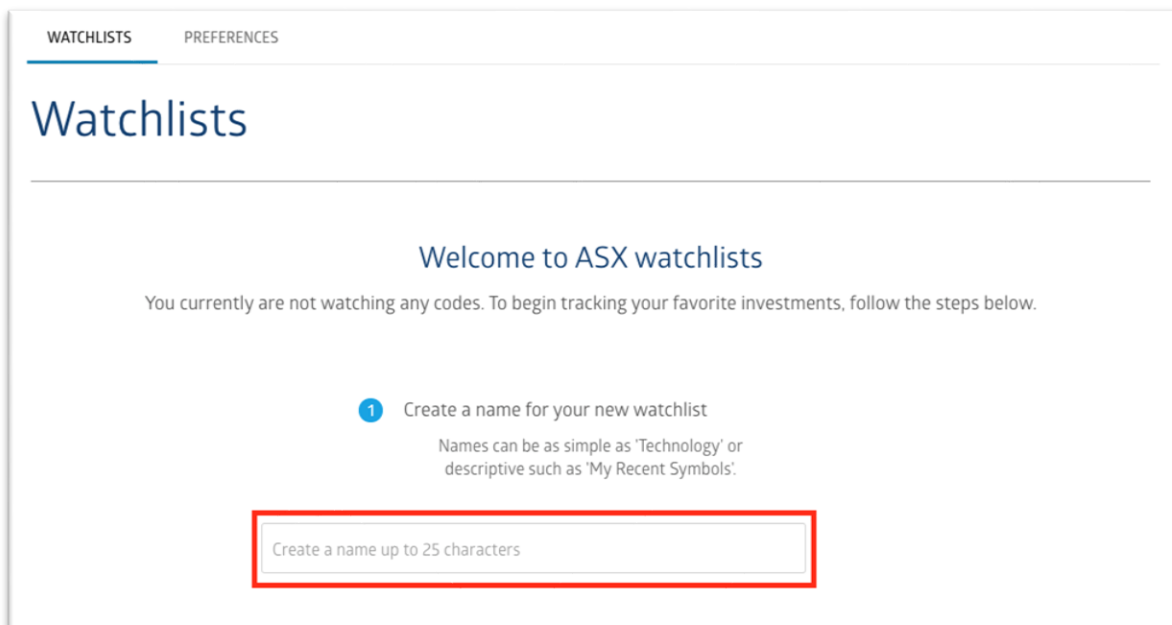
New Investor

Once you have completed the mandatory fields please scroll down and click on **‘Save and Go to Dashboard’**.

Creating a watchlist

Step 1

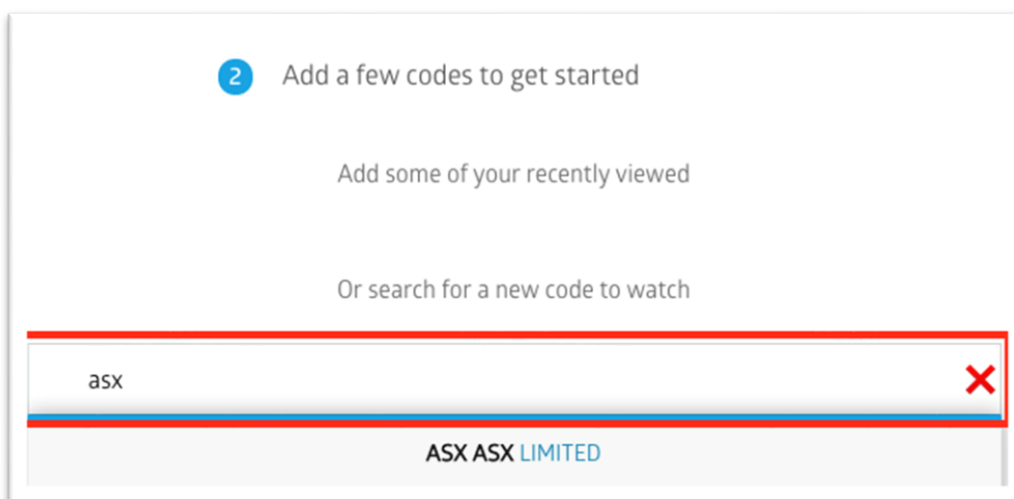
To create a watchlist, first enter a name for your watchlist under “**1** Create a name for your new watchlist”.



The screenshot shows the 'WATCHLISTS' tab selected in the top navigation bar. The main heading is 'Watchlists'. Below this, it says 'Welcome to ASX watchlists' and 'You currently are not watching any codes. To begin tracking your favorite investments, follow the steps below.' Step 1 is highlighted: '1 Create a name for your new watchlist'. A sub-note says 'Names can be as simple as 'Technology' or descriptive such as 'My Recent Symbols'.' Below this is a text input field with the placeholder text 'Create a name up to 25 characters', which is highlighted with a red border.

Step 2

Then under “**2** Add a few codes to get started” enter the security code you would like to add to your watchlist.



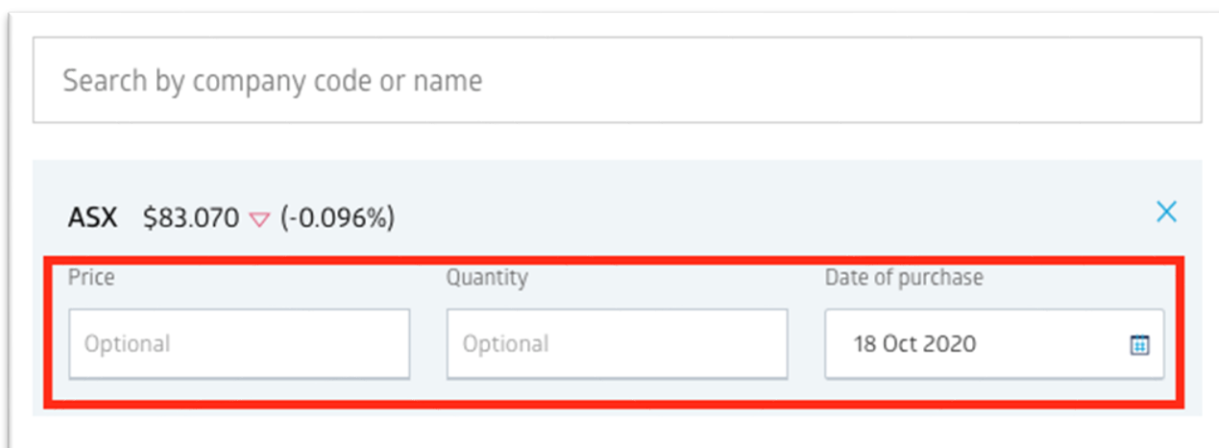
The screenshot shows Step 2: '2 Add a few codes to get started'. It offers two options: 'Add some of your recently viewed' and 'Or search for a new code to watch'. Below the search option is a search bar containing the text 'asx' and a red 'X' icon on the right. Below the search bar, the text 'ASX ASX LIMITED' is displayed.

Please ensure you only add one code at a time, you must click on the security code/company name that appears to add it to your watchlist.

Step 3

Once you have clicked on the security code, you will be given the opportunity to add any holding information.

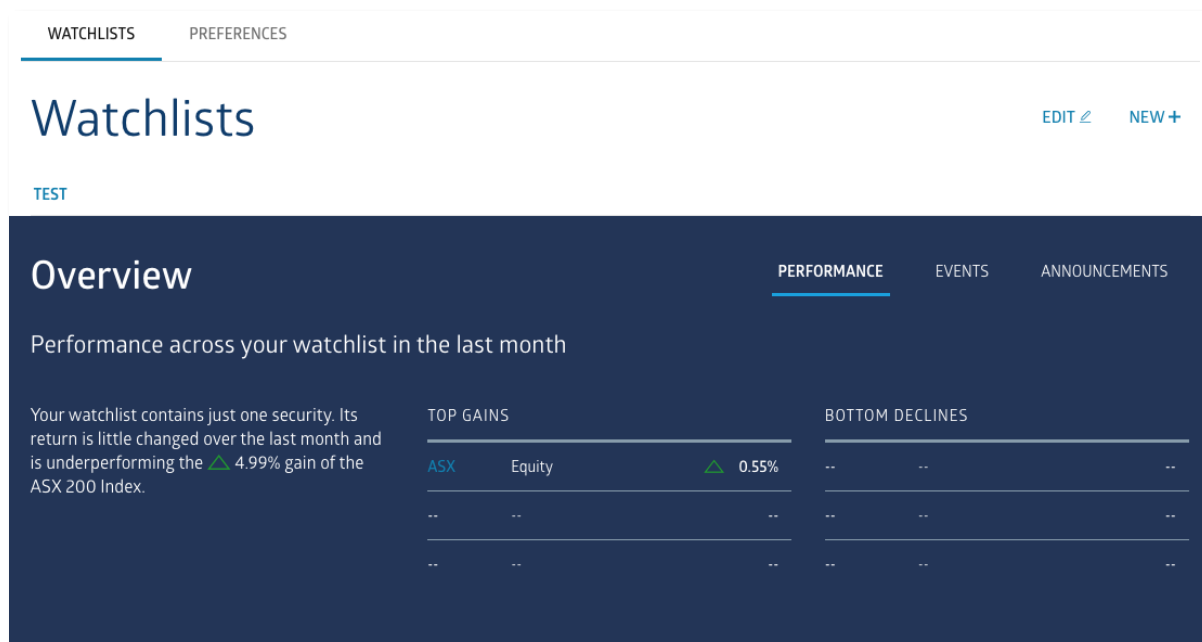
Please note: this can be added at a later date if you do not currently have your holding information to hand.



Please scroll down and click 'CREATE'.

Step 4

You will now be presented with an overview of your watchlist.



When you scroll down you will see detailed price information, such as: Last Price, Bid-Offer, Today's Change, 52 Week Range and Volume. If you have added holding data this will be shown in the right column, with Current Value, Today's Change and Total Gain / Loss.

Test [↗](#) Add to watchlist

Equities | 1 company
Prices delayed by at least 20 minutes

CODE ▼	LAST PRICE (\$)	BID - OFFER (\$)	TODAY'S CHANGE	52 WEEK RANGE	VOLUME	QTY	CURRENT VALUE (\$)	TOTAL GAIN / LOSS (\$)	ACTIONS
ASX	83.070	82.680 - 83.600	▼ 5-0.080 (-0.097%)	63.020 91.320	523.757	--	--	--	✎ 🗑️

To add another company, type the security code or company name in the 'Add to watchlist' box. After typing, click on the '+' button to add to your watchlist.

CBA| ✕

CBA COMMONWEALTH BANK OF AUSTRALIA. +

CBA0F7 57.00 CALL OPTION EXPIRING 17-JUN-2021 +

You can again add optional holding information, click 'ADD' to add to your watchlist

ADD TO WATCHLIST
✕










CBA \$69.240 ▼ (-0.058%) BID/OFFER \$69.200-\$69.300 STATUS --

Price: Quantity: Date of purchase: 📅

CANCEL ADD

Step 5

To edit holding data for securities already in your watchlist, simply click on the pencil icon.

CODE 	LAST PRICE (\$)	BID - OFFER (\$)	TODAY'S CHANGE	52 WEEK RANGE	VOLUME	QTY	CURRENT VALUE (\$)	TOTAL GAIN / LOSS (\$)	ACTIONS
ASX	83.070	82.680 - 83.600	 -\$0.080 (-0.097%)	 63.020 - 91.320	523,757	--	--	--	 
CBA	69.240	69.200 - 69.300	 -\$0.040 (-0.058%)	 53.440 - 91.050	2,994,507	--	--	--	 

To remove a security, click on the bin icon.

Please note, by deleting a security you will also delete all holding data, this cannot be recovered.

For further information, review our [Frequently Asked Questions](#).