



WebTrader

User guide

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Overview

WebTrader, BigBank's online brokerage platform, allows you to easily and quickly access and manage your investment accounts. You can review market research and your account details, transfer funds, place trades, rebalance your portfolio, and more. Use this guide to learn how to perform common tasks.

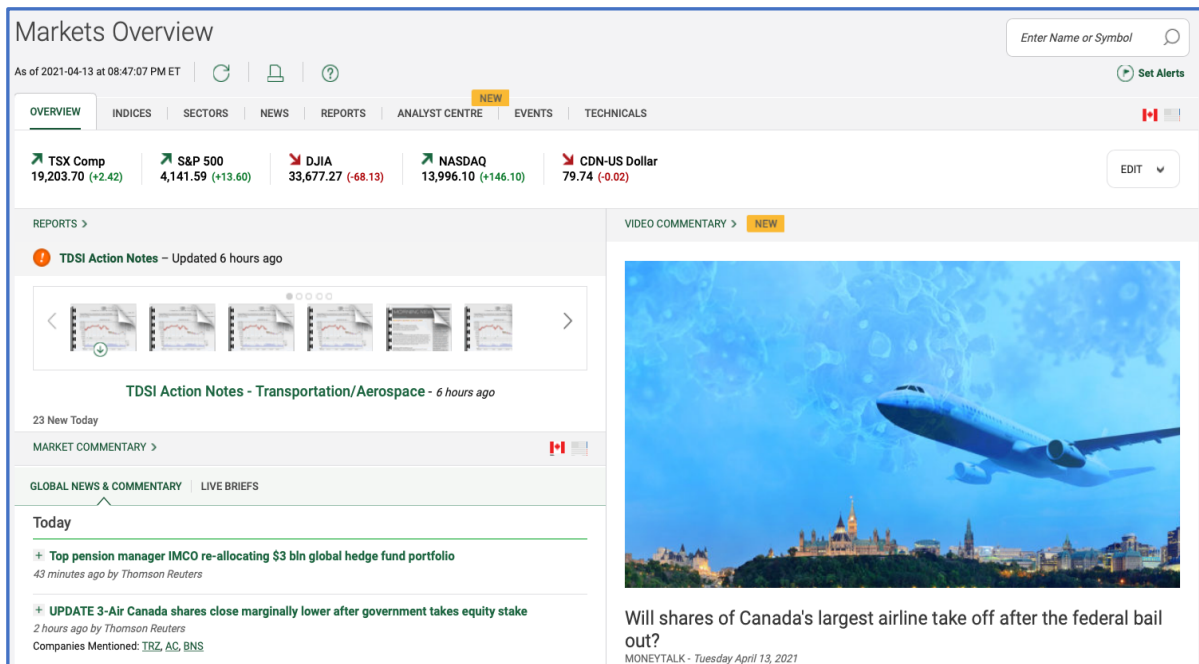
Placing a trade

The following procedures will help you place a trade using WebTrader.

Researching historical stock data

Before buying or selling a stock, you can research the stock using the **Research** tab.

1. On the **Dashboard**, click the **Research** tab. A **List** pane appears.
2. In the **List** pane, under the **Investments** category, click **Stocks**. A new page opens with stock market information.



The screenshot displays the 'Markets Overview' page. At the top, there is a search bar labeled 'Enter Name or Symbol' and a 'Set Alerts' button. Below the search bar, there are navigation tabs: OVERVIEW, INDICES, SECTORS, NEWS, REPORTS, ANALYST CENTRE, EVENTS, and TECHNICALS. The 'OVERVIEW' tab is selected. The main content area shows market indices: TSX Comp (19,203.70, +2.42), S&P 500 (4,141.59, +13.60), DJIA (33,677.27, -68.13), NASDAQ (13,996.10, +146.10), and CDN-US Dollar (79.74, -0.02). Below the indices, there is a 'REPORTS' section with a 'TDSI Action Notes' report updated 6 hours ago. To the right, there is a 'VIDEO COMMENTARY' section with a video thumbnail showing an airplane flying over a cityscape. The video title is 'Will shares of Canada's largest airline take off after the federal bail out?' and it is dated Tuesday April 13, 2021.

3. In the **Name/Symbol** field on the upper right of the page, enter the name or symbol of the stock you want to research, and press **Enter**. The stock's page appears.
4. Gather information about the stock by viewing the metrics listed on the page. For further information, click various tabs, such as **Charts** and **Earnings**.

Obtaining a quote

To obtain a stock quote, use the **Research** tab.

1. On the **Dashboard**, click the **Research** tab. A **List** pane appears.
2. In the **List** pane, under the **Tools** category, click **Quotes**. A new **List** pane appears.
3. In the **Symbol/Name** field on the upper left of the page, enter the symbol or name of a stock, and press **Enter**. Current and historical price information appears.

- If desired, repeat Step 3 using other stock symbols or names. A list of stock prices will be automatically generated, as shown below.

Name	Last Price	Change	Bid [Lots]	Ask [Lots]	Volume	Day Range High [Low]	52 Wk Rang High [Low]
BTCX.B CI GALAXY BITCOIN ETF (CAD UNHGD)	\$11.78	-\$0.34 -2.81%	\$11.68 [12]	\$11.78 [2]	296.7k	\$11.79 [\$11.49]	\$12.31 [\$9.71]
TD TORONTO DOMINION BANK	\$82.88	+\$0.26 +0.31%	\$82.80 [10]	\$82.88 [2]	4.2M	\$83.06 [\$82.615]	\$83.82 [\$53.19]

Deciding on price type

Before placing a trade, you must decide on the price type so that your trade is fulfilled at a price that is acceptable to you.

- On the Dashboard, click the **Learn** tab. A list of links appears.
- Click **Learn about trading**. Three boxes appear.
- In the **Ready to Trade** box, click **Learn about trading**, as shown below. A list appears.

Learn the Basics

Launch your investing journey with introductory lessons to get you started.

[Learn about investing >](#)

Take a WebBroker Tour

Learn how WebBroker is your tool to research, invest and track your progress.

[Learn about WebBroker >](#)

Ready to Trade

Learn how to buy and sell stock & ETF investments, and how to take advantage of different order types.

[Learn about trading >](#)

- From the list, click **Price Type Essentials** to view a two-minute informational video about price types.

Entering trade details

After you have gathered your trade details, you can place a trade using the **Trading** tab.

- On the **Dashboard**, click the **Trading** tab. A **List** pane appears.
- In the **List** pane, under the **Buy/Sell** category, click **Stocks & ETFs**. The Buy & Sell window opens, as shown below.

Webtrader User guide

The screenshot displays the Webtrader interface for placing a trade. At the top, there are navigation tabs for 'Stocks & ETFs', 'Options', 'Strategies', 'Mutual Funds', and 'GICs'. The 'Buying Power' section is visible in the top right corner, along with a 'More Info' link. The main form includes a 'Symbol or Name' field with a search icon, an 'Action' field with 'Buy' and 'Sell' buttons, a 'Quantity' field, a 'Price Type' dropdown menu set to 'Market', and a 'Good 'til' dropdown menu set to 'Day'. A 'Clear' button and a 'Preview Order' button are located at the bottom right of the form. A text box on the right side of the form prompts the user to 'Enter stock/ETF symbol or company name to obtain a quote.'

3. In the **Symbol or Name** field, enter the symbol or name of the stock to be traded.
 4. In the **Action** field, select **Buy** or **Sell**.
 5. In the **Quantity** field, enter the number of stock shares or ETF units to buy or sell.
 6. In the **Price Type** field, click the arrow button to display the choices and then select the desired **Price type**.
- Note:** Stock market prices fluctuate significantly, and it takes two trading days to settle a trade. You therefore need to choose an appropriate price type before completing this procedure to ensure your trade is completed at an acceptable price.
7. In the **Good 'Til** field, select **Day** or **Specify**. If you choose **Specify**, select a future date from the calendar.
 8. Click **Preview Order**. The Confirm Order window appears.

After you enter trade details, you must preview them and confirm the trade. See *Previewing trade details and confirming trade*.

Previewing trade details and confirming trade

After you have entered your trade details, you must preview them and confirm the trade within the Confirm Order window.


1. In the Confirm Order window, shown below, check that all fields are filled correctly, and then click **Agree & Send**.

Buying Power [More Info](#)

🇨🇦 BTCX.B CI GALAXY BITCOIN ETF (CAD UNHDG)

Action	Quantity	Price Type	Good 'til
Buy	1	Market	Day

Est. Total **\$21.77 CAD** (\$11.78 Principal + \$9.99 Commission)

 **Warnings: Please read and accept all warnings to proceed and send your order.**
The markets are closed for today. Your order will be processed on the next business day. [41914]

[Cancel](#) [Change](#) [Agree & Send](#)

2. If you want to correct fields, click **Change**. The Buy & Sell window opens:
 - a. In the window, correct the fields as necessary.
 - b. Click **Preview Order** and return to Step 1 above.

Checking trade status

After you submit a trade order, you can check its status using the **Trading** tab.

1. On the **Dashboard**, click the **Trading** tab. A **List** pane appears.
2. In the **List** pane, under the **Trade Management** category, click **Order Status**. The Status window opens showing a table of active trades.
3. In the table, consult the “Status” column to confirm whether your trade is “Open” or “Fulfilled.”

Next chapter: Trading options

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