



Spread bets and CFDs are complex instruments and come with a high risk of losing money rapidly due to leverage. **79% of retail investor accounts lose money when spread betting and/or trading CFDs with this provider.** You should consider whether you understand how spread bets and CFDs work and whether you can afford to take the high risk of losing your money. Professional clients: Losses can exceed deposits when spread betting and trading CFDs. Countdowns carry a level of risk to your capital as you could lose all of your investment. These products may not be suitable for all clients therefore ensure you understand the risks and seek independent advice. Invest only what you can afford to lose.

# Get started now

This quick guide will help you get to know the following features:

1. Navigation toolbar and account
2. Product library
3. Dropdown menu navigation
4. Place a trade using our order ticket
5. Monitor your account
6. Watchlists
7. Advanced charting
8. 1-click trading
9. Market pulse – news, insights and market calendar
10. Countdowns (professional clients only)
11. Trading tools
12. Settings
13. Support – trader development and live help



# 1. Navigation toolbar and account

Access our advanced tools and features, switch layouts, set preferences and monitor your account value



- a.** Search for any product using the built-in search tool
- b.** Open the product library to conduct a more advanced search and filter
- c.** Open an existing watchlist containing popular products, or create a new one
- d.** Switch between different saved screen layouts. Set layout to auto save or not through the settings icon
- e.** Manage your existing positions and pending orders, and view your trading history
- f.** Switch between 1-click trading modes
- g.** Fund your account via card payment or bank transfer, and make withdrawals
- h.** Get the latest market information with our Market Pulse tools, including market calendar and Reuters news
- i.** Access our range of trading tools to spot potential trading opportunities within the markets, as they happen
- j.** Place straightforward, fast-paced trades over short timeframes on popular indices, commodities and FX pairs with Countdowns (professional clients only)
- k.** Platform training, feedback and live help
- l.** The amount of funds that are currently being used as total margin
- m.** The amount of available equity you have available to open new positions
- n.** The current value of your trading account
- o.** View details of your current close-out levels – if these are reached your positions may be closed
- p.** The amount of available cash you have in your account
- q.** Your current aggregate profit or loss across all open positions
- r.** Hide the account value details
- s.** Access market data feeds, order preferences and account settings
- t.** Securely log out of the platform

## 2. Product library

Use the search and filter functions in the product library to find the instruments you want to trade

- Type in the name of the product you want to search for
- Filter by cash or forward products
- Filter products by type, region, price performance and volatility
- Click on a product's buy or sell price to open an order ticket

The screenshot shows the 'Product Library' interface. At the top, there is a search bar (a) and a 'Reset' button. Below the search bar are filter dropdowns: 'Forwards and Cash' (b), 'Type', 'Sub Type', 'Region', and 'Country' (c). The main content area lists various product categories with their counts and brief descriptions:

- Commodities (120)**: Natural resources and agricultural products have been traded for centuries. Demand and supply play a major role in the commodity price movement.
- Crypto (1)**: Speculate on the price movement of the world's most popular digital currencies which operate independently from governments and central banks.
- Currencies (339)**: The foreign exchange market is highly impacted by government policy. It's unique because it offers the highest trading volumes, high liquidity, and continuous operation.
- Indices (98)**: A single country index represents the health of a whole country's economy. Broaden and diversify with indices.
- Shares (9229)**: Major shares from around the world: UK, US, Europe and Asia; covering a wide range of products and services, including banking, manufacturing, transportation, research, and technology.
- Treasuries (70)**: The Treasuries market includes government debt obligations such as Gilts, T-Notes and Bunds. The economic status of a specific region can impact the value of the treasury.
- Digital 100s**: A Digital 100 is a limited-risk product which allows you to speculate whether a specified event will occur within a set time frame. Simply select your Expiry and Strike Price from a selection of four Digital 100 types: Ladder, One Touch, Up/Down and Range, with the added flexibility of being able to close your Digital 100 prior to its Pre-Close Period.
- Countdowns**: Countdowns are limited-risk trades on timeframes from as little as 30 seconds. Just decide whether you think a product's Settlement price at the end of your chosen timeframe will be higher or lower than the current Open price.

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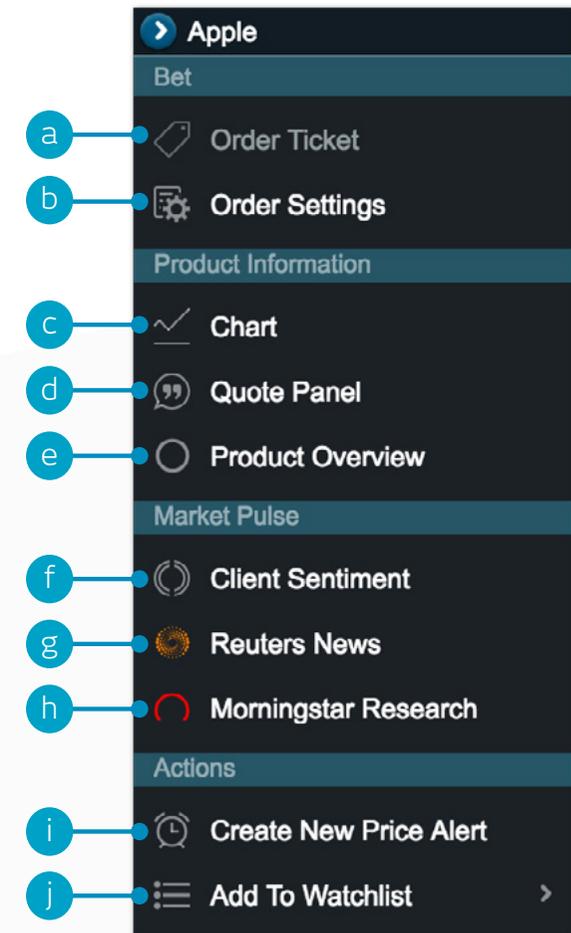
The screenshot shows a detailed view of a product in the 'Product Library'. The product is 'Gold - Cash'. The interface includes a table with columns for 'PERFORMANCE', 'BUY', and 'SELL'. A blue circle (d) highlights the 'BUY' price of 1,257.01.

PRODUCT	PERFORMANCE	BUY	SELL
Gold - Cash	+0.22%	2.76	1,256.71
Gold - Aug 2017	+0.22%	2.75	1,235.85
Gold - Dec 2017	-	-	1,238.25

# 3. Dropdown menu navigation

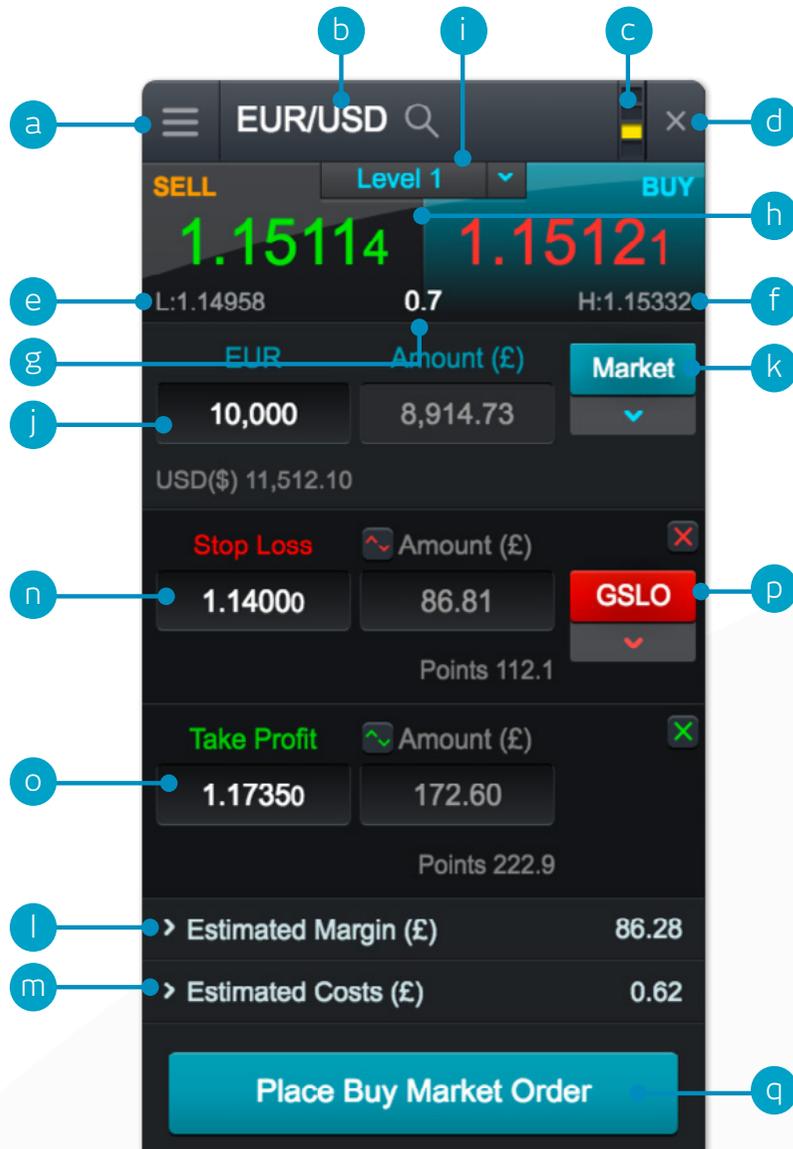
Select the dropdown menu icon next to a product name to unlock product-specific options

- a. Open a new order ticket for the product you've selected
- b. Set order defaults for this specific product, such as default risk management and order quantity
- c. Open a new chart for that product
- d. Open a quote panel with buy and sell prices, daily highs and lows plus real-time spread. Note that the screen price is not necessarily the price your trade will be executed at
- e. View product information such as trading hours, margin requirements, holding costs and real-time spread
- f. View client sentiment for the product, related to both client count and position value, updated every minute. The client sentiment feature is indicative, has inherent limitations and may be out of date at any given time
- g. Open a Reuters newsfeed containing only news that's relevant to the product
- h. Access Morningstar equity research to view current cash fundamentals and Morningstar's proprietary fair value estimate, which is the Morningstar analyst's estimate of the potential value of the share.
- i. Set and manage price alerts. View the real-time price difference between your alerts and the current market price
- j. Add this product to one of your watchlists or create a new one



# 4. Place a trade using our order ticket

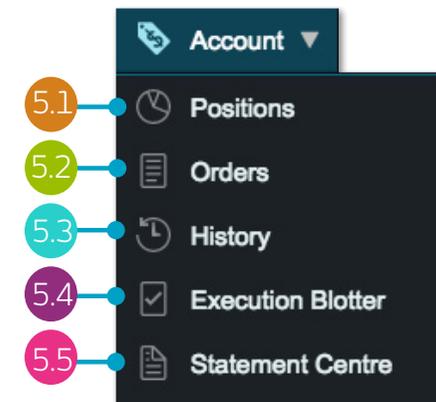
Select any buy or sell price on the platform to launch an order ticket



- a. You can open a product's dropdown options menu to access product information, Reuters news, live charting, module linking and much more
- b. Use the search function to change the product shown in the order ticket
- c. Link two or more modules together so when you change the product in one module, the other module(s) will automatically update to show the new product
- d. Close order ticket
- e. The lowest price this product has reached during today's trading session
- f. The highest price this product has reached during today's trading session
- g. The live spread between the buy and sell price
- h. Select the buy or sell price to switch between a buy or a sell order
- i. The price depth relevant to your order quantity. Click here to show the price ladder. Larger trade sizes can attract a wider spread
- j. Enter the number of units or exposure you want to buy or sell
- k. Change the order type - choose between market, limit or stop entry orders
- l. The estimated amount of margin required to enter this position
- m. The estimated costs involved in entering this position
- n. Add a stop-loss order to this position to protect against adverse price movements
- o. Add a take-profit order to this position to set a target price
- p. Set a regular stop-loss, trailing stop-loss or a guaranteed stop-loss order (GSLO) by price or points distance. Trailing stop-loss orders follow favourable price movements by a set number of points. GSLOs guarantee an exit price, for a premium
- q. Submit your trade

# 5. Monitor your account

Manage your existing positions and pending orders, and view your entire account history



## 5.1 Positions

POSITION/ORDER#	B/S	UNITS	AMOUNT	PRICE	CONVERSION RATE	MARGIN	PROFIT/LOSS	STOP LOSS	TAKE PROFIT	SELL	BUY
Crude Oil Brent - Cash	[1] B	120	£4,442.76	48.135	0.76522	0.75%	£33.62	£48.76	-	48.666	48.696
EUR/USD	[1] B	25,000	£22,209.25	1.107595	0.76522	0.2%	£44.41	£951.64	1.08544	1.57000	1.15741
Gold - Cash	[1] S	100	£101,527.80	1,320.00	0.76522	0.5%	£476.78	£5,926.62	-	1,242.25	1,241.55
US 30 - Cash	[1] B	3	£49,176.07	21,312.131	0.76522	0.2%	£99.21	£529.26	-	21,042.80	21,044.08
USD/JPY	B	17,000	£13,075.55	108.9775	0.006838	0.2%	£26.09	£337.97	-	111.885	111.892
			£190,432.04				£680.13	£7,794.27	Account Netting: Enabled		

a. Expand and collapse all trades

b. Collapse to view aggregate position or expand to show individual orders

c. Sell trade

d. Buy trade

e. The number of units of your aggregate position

f. The total exposure of the position

g. The total exposure of your aggregate position

h. The average entry price of your aggregate position

i. The current aggregate profit or loss on this position

j. Open an order ticket to sell

k. Open an order ticket to buy

l. Modify an order, including any risk management orders

m. Close position

n. Close all orders in this product

o. Turn 'Account Netting' off to place separate long and short trades on the same product at the same time

## 5.2 Pending orders

PRODUCT	ORDER#	TYPE	UNITS	EXPIRY	ORDER PRICE	TRIGGER DISTANCE	STOP LOSS	TAKE PROFIT	SELL	BUY
Gold - Cash	O4-PB-ZR0W	Limit Buy	200	GTC	1,200.00	42.44	1,176.00	1,224.00	1,200.14	1,202.44
Silver - Cash	O4-PB-ZR0S	SE Sell	30,000	GTC	14.000	228.5	14.140	13.720	16.285	16.315

- a. Open an order ticket to sell
- b. Open an order ticket to buy
- c. Cancel this pending order
- d. Modify this pending order, including price level and risk management

## 5.3 History

DATE/TIME	TYPE	PRODUCT	UNITS/AMT	PRICE	STOP LOSS	TAKE PROFIT	AMOUNT	BALANCE
18 Jul 2017 14:20:00	Binary Settled	EUR/USD - Binary / Countdown	5.00	0	-	-	0.00	22,618.05
18 Jul 2017 14:15:22	Binary Buy	EUR/USD - Binary / Countdown	5.00	8.2	-	-	-41.00	22,618.05
18 Jul 2017 13:29:40	1-Click Trading: Activated	-	-	-	-	-	-	-
18 Jul 2017 11:07:11	Buy Trade Modified	EUR/USD	25,000.00	1.107595	1.08544	1.57000	0.00	-
18 Jul 2017 11:06:48	Close Trade	US 30 - Cash	10 Uts	21,646.1	-	-	2,659.05	22,659.05
18 Jul 2017 11:06:32	Buy Limit Order	Gold - Cash	200 Uts	1,200	1,176.00	1,224.00	-	-
18 Jul 2017 11:06:09	Sell SE Order	Silver - Cash	30,000 Uts	14	14.140	13.720	-	-
18 Jul 2017 10:51:30	Buy Trade	USD/JPY	5,000.00	109.135	-	-	0.00	-
18 Jul 2017 10:51:30	Buy Trade	USD/JPY	12,000.00	109.912	-	-	0.00	-

- a. The profit or loss achieved by this action
- b. Your account balance after this action
- c. View additional information such as holding costs and price depth details
- d. Filter by action type, date, order ID, amount or product
- e. Access your account settings
- f. Access the statement centre
- g. Export your history to an excel file

## 5.4 Execution blotter

This module provides you with a quick and easy way to view executed trade information without all the extra details associated with the full account history.

## 5.5 Statement centre

Download daily, monthly or yearly trading statements. Have them emailed to you or to third-party email addresses.

## 6. Watchlists

Create watchlists containing your favourite products for easy access, then view a personalised Reuters newsfeed of related articles

The screenshot shows the 'Watchlists' interface. On the left is a sidebar menu with the following items: 'Watchlists' (dropdown), 'Create New Watchlist' (with callout 'a'), 'Banks (11)', 'Energy commodities (6)', 'Indices (23)', 'Major FX Pairs (11)', and 'Popular Products (22)'. The main area displays a 'Popular Products' table with columns: PRODUCT, LOW, HIGH, PERFORMANCE, and two columns for SELL and BUY prices. The table contains the following data:

PRODUCT	LOW	HIGH	PERFORMANCE	SELL	BUY
EUR/GBP	0.87809	0.88565	▲ 0.64%	56.9	0.88484
US 30 - Cash	21,605.73	21,659.50	▲ 0%	1.22	21,640.57
Crude Oil Brent - Cash	48.139	48.644	▲ 0.7%	34.2	48.604
EUR/JPY	129.054	129.589	▲ 0.11%	15.1	129.417
EUR/USD	1.14712	1.15386	▲ 0.4%	46.7	1.15245
Crude Oil West Texas - Cash	45.781	46.251	▲ 0.54%	24.9	46.201
Gold - Cash	1,232.77	1,239.08	▲ 0.16%	2.08	1,236.03

Callouts a-j point to various UI elements: 'a' points to 'Create New Watchlist'; 'b' points to the 'Watchlists' header; 'c' points to the 'Popular Products' header; 'd' points to the 'PERFORMANCE' column header; 'e' points to the dropdown arrow of the first product; 'f' points to the 'LOW' price; 'g' points to the 'HIGH' price; 'h' points to the percentage change; 'i' points to the 'SELL' price; and 'j' points to the product name 'Crude Oil West Texas - Cash'.

- a. Create a new watchlist here, then add products using their dropdown menus, or simply drag and drop a product into the watchlist module
  - b. Amend the settings of the watchlist module and open a price ticker, delete watchlists and personalise Reuters news and add, remove or reorder columns
  - c. Sort watchlist by product name
  - d. Sort watchlist by performance
  - e. Open an options menu for this product which gives access to product information, Reuters news, live charting, saved charts, chart forum, client sentiment and much more
  - f. The lowest price this product has reached today
  - g. The highest price this product has reached today
  - h. The percentage price movement this product has moved today
  - i. The points price movement this product has moved today
  - j. If a watchlist is part of a linked group, select a product name to change the product shown throughout the group
- Map Reuters news to your watchlist via the Reuters news module**

# 7. Advanced charting

The highly customisable, intuitive charting interface includes over 110 drawing tools and technical indicators, and chart pattern recognition capability

- a. Open the product options menu to access product-specific information, chart forum, client sentiment, Reuters news and much more
- b. Blue triangle: click here to close or amend open or pending positions - you can edit risk management directly on the chart
- c. Open a value box area to see the open, high, low and close values, plus greater detail on technical indicator values
- d. Change the interval and timeframe of your chart history using a selection of options
- e. Choose between different chart types, including candlestick, renko and point and figure charts
- f. Add technical studies and overlays to your chart to identify potential technical trading set-ups
- g. Change settings, customise your technical indicator and view chart education
- h. Add a selection of drawing tools to your chart to identify strategic price levels and highlight areas of interest
- i. Add technical pattern and candlestick recognition to your chart – see the results evolve in real time
- j. Turn trade plot on or off
- k. Set trading tools as a favourite by selecting the star icon
- l. Save up to five charts for each product and access them anytime
- m. Open chart settings to set chart defaults, presets and other settings



## 8. 1-click trading

The 1-click trading feature allows you to open or close a trade with just one click. Activate this feature in the main toolbar or under order settings. Once activated, 1-click trading is turned on for all price buttons by default

The image shows a trading interface for EUR/USD. The main window displays a 'SELL' button at 1.15353 and a 'BUY' button at 1.15360. Below the price buttons, there is a dropdown menu for trade size, currently set to 10,000. To the left, the stop-loss (SL) is set to 1.15584, and to the right, the take-profit (TP) is set to 1.13045. A callout 'a' points to the trade size dropdown, 'b' points to the price buttons, and 'c' points to the SL and TP fields. A secondary window shows a list of open trades with a red 'x' button next to a trade at 21,562.19, with a callout 'd' pointing to it. A third window shows the main toolbar with the '1-Click' mode set to 'Single-click', and a callout 'e' pointing to it.

- Enter trade size manually or select from the dropdown menu
- Then just click the buy price or sell price to place the order
- By default your personal order settings, including stop-loss order and take-profit order settings, will be applied to your 1-click market order
- When 1-click trading is activated, you will also be able to close open trades and positions with one click on the red close out 'x' button in the positions window
- Choose between three 1-click trading modes: single-click, double-click and locked

**Note:** You can change a number of 1-click settings within the order settings module

Please note that before you can use 1-click trading, you will need to carefully read and then accept the 1-click trading terms of use

# 9. Market pulse – news, insights and market calendar

Get the latest news and updates on what's moving the markets with our market pulse tools

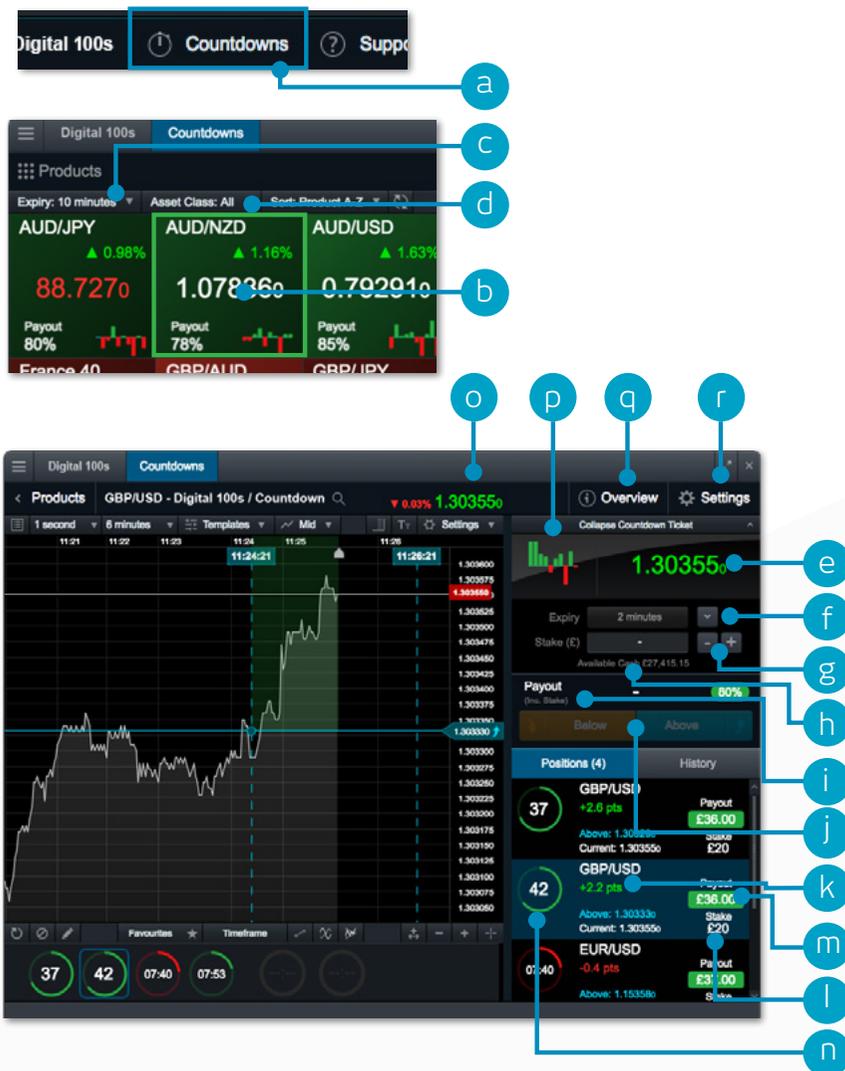
- a. The Reuters news module feeds live headlines and articles across all asset types straight into the platform as they are published. Reuters news can be filtered according to products within a watchlist
- b. View a live stream of market updates direct from our team of global market analysts
- c. Access the aggregated chart forum feed. Connect with other CMC Markets clients directly through the platform and share potential trade set-ups, analysis and market commentary
- d. Use the market calendar to view the latest economic data releases from across the globe and set reminders for future updates
- e. Access our financial channel with global market analysis and strategy for the active trader
- f. Keep up to date with the latest major market events by following our targeted Twitter feed
- g. A depository of our global analyst content that can be filtered by analyst, theme, region and content type



# 10. Countdowns (professional clients only)

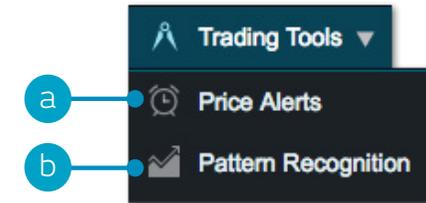
Countdowns provide a fast, straightforward way to trade with limited risk on the short-term price movements of financial markets

- Open the Countdowns product grid
- Each product square in the product grid shows the current Countdown price, the number of open positions on each product, the daily performance, the payout and the trend analyser tool. Click the square to launch an order ticket and chart
- Payouts and trend data update automatically if you change the expiry timeframe
- Sort the product grid by a variety of different options
- The order ticket shows the current Countdown price. With Countdowns you decide if you think the settlement price for this product will be above or below the current Countdown price at the end of your chosen expiry
- Select your expiry. Different expiries may have different payout percentages
- Enter your stake size or dial it up or down by set amounts with the +/- icons
- 'Available cash' is the amount you have available to place new Countdowns
- The payout amount is the total potential return if your Countdown is successful. It includes your original stake
- Choose whether you think the settlement price will be above or below the current Countdown price at the end of your selected expiry. Click the relevant button to open your position
- The points difference between the current settlement price and your Countdown price
- Click any open position to see a live chart showing your chosen direction, your Countdown price and coloured shading that shows if you are winning or losing
- The payout amount and the stake for this open position are shown here
- The Countdown clock will be coloured green, red or blue, depending on whether the position is winning, losing or a draw
- This is the current settlement price for this product
- The trend analyser draws the price action for the last 10 time intervals depending on expiry selected. For example, if a five-minute expiry is selected, each coloured bar represents the net price movement over five-minute intervals (12:00, 12:05, 12:10 etc)
- Click to view details of payout percentages across different expiries if you win or draw, plus minimum and maximum stake sizes and total position sizes
- Remove pre-order confirmations, change default order sizes, set default chart types



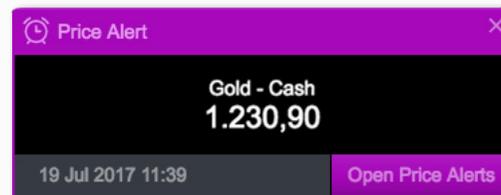
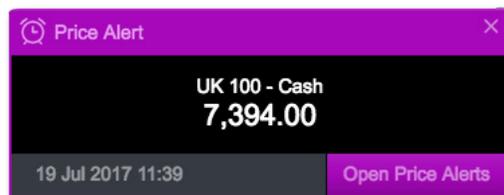
# 11. Trading tools

Use these trading tools to set up alerts for patterns and important price levels



a. Set and manage price alerts – view the real-time price difference against your alerts and the current market price

PRODUCT	PRICE	TYPE	EMAIL	EXPIRES	TRIGGERED	POINTS AWAY	SELL	BUY	ACTIONS
Gold - Cash	1,240.00	Mid			19 Jul 2017 11:40	0.04%	0.85 +	1,239.30	1,239.80
USOJPY	111.950	Sell			19 Jul 2017 11:40	0.04%	4.8 +	111.990	112.005
UK 100 - Cash	7,394.00	Buy			19 Jul 2017 11:39	0.00%	0.16 +	7,393.04	7,393.84
Crude Oil Brent - Cash	49.000	Mid			19 Jul 2017 11:37	0.02%	1.0 +	48.995	49.025
EUR/USD	1.15360	Mid			19 Jul 2017 11:37	0.02%	3.3 +	1.15323	1.15331
GBP/USD	1.30000	Mid		19 Aug 2017		-0.32%	42.05 +	1.30416	1.30425
US 30 - Cash	21,580.00	Mid		19 Aug 2017		-0.09%	20.78 +	21,558.22	21,560.22



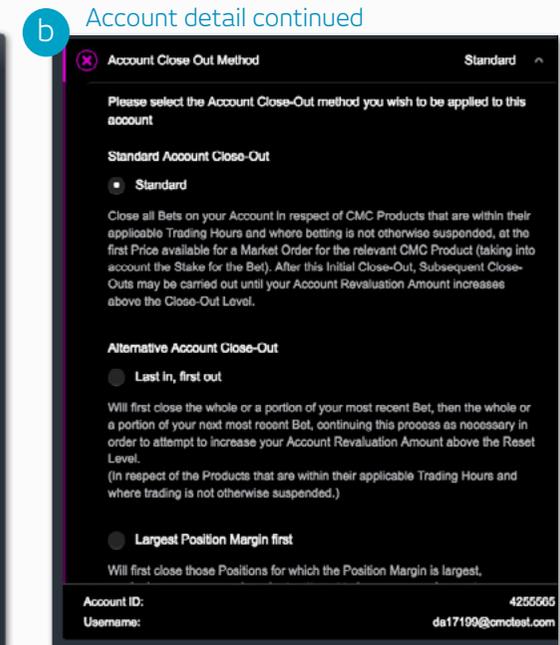
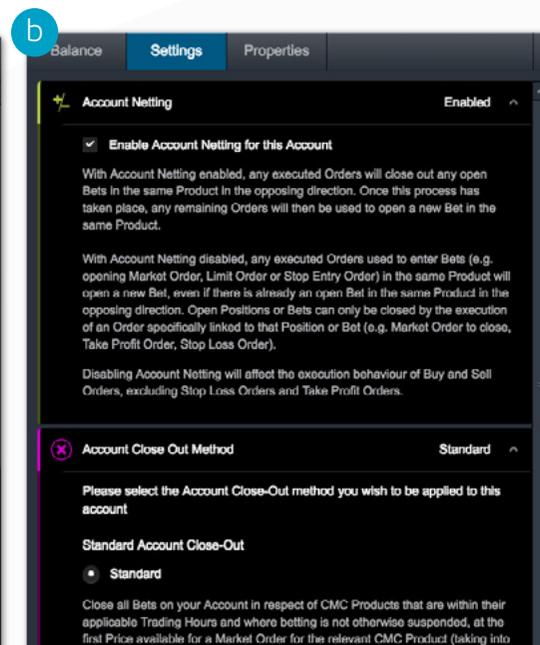
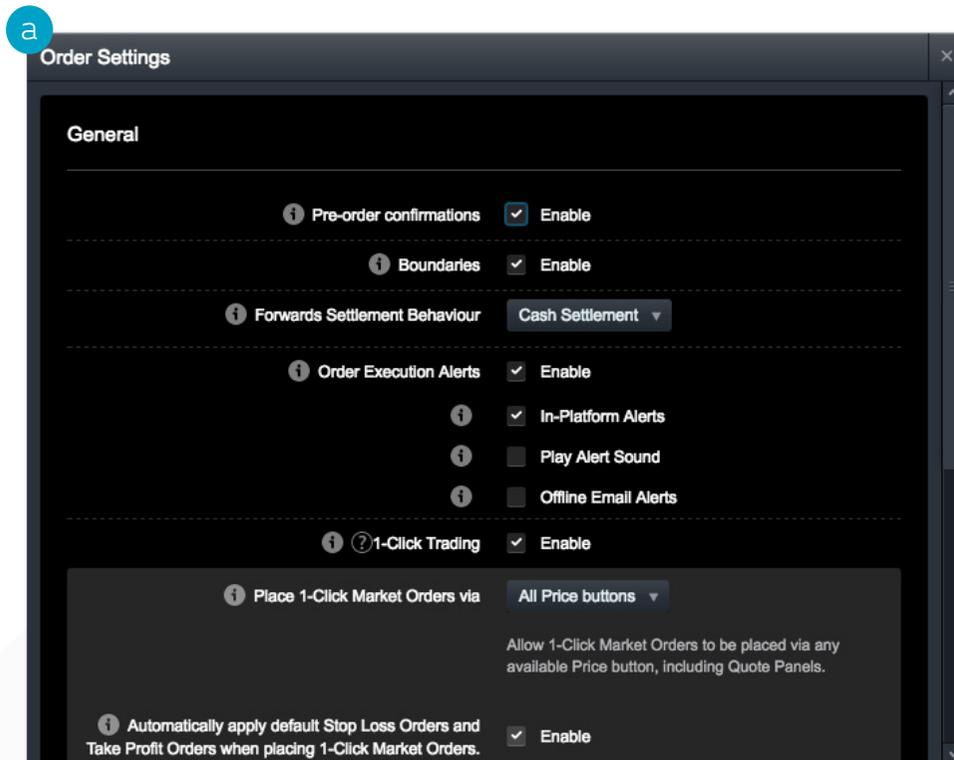
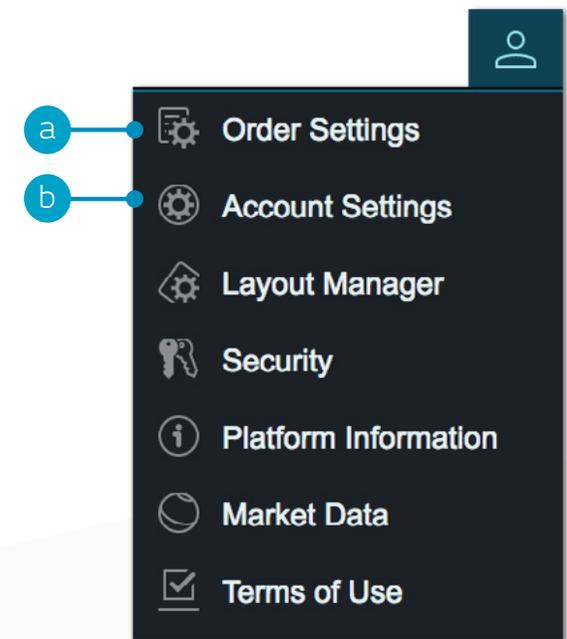
b. Set up the pattern recognition scanner to alert you of potential technical trade set-ups every 15 minutes



# 12. Settings

Ensure you set up your trading account to suit your individual needs by using the numerous inbuilt account preferences. Select the user preferences icon to access account and order settings

- Configure your preferred order settings globally, by asset class or by specific products. personalise settings on default trade size, boundaries, forward settlement behaviour, 1-click trading, execution alerts, stop-loss orders, take-profit orders, limit orders and stop-entry orders.
- Disable 'Account Netting' to place separate long and short trades on the same product at the same time. Select your preferred account close-out method. Choose between 'standard account close-out' or 'alternative account close-out' ('last in, first out', 'largest position margin first' or 'largest position loss first').



# 13. Trader development and live help

Access our videos and written trader development material, leave feedback and get help directly through the platform

- a. Get a quick overview of the core features and functions of the Next Generation platform
- b. Watch platform tour videos explaining how to best use our many tools and features
- c. Learn more about different trading strategies to help maximise your trading potential
- d. Develop your trading skills by registering for live and online seminars presented by our market experts
- e. View a library of useful trading articles to help enhance your trading knowledge
- f. Open an instant message conversation with a member of our trading helpdesk



If you have any questions while getting to know the platform, please don't hesitate to contact us on +44 (0)20 3003 8588 or at [clientmanagement@cmcmarkets.co.uk](mailto:clientmanagement@cmcmarkets.co.uk).

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The information contained in this quick guide is accurate at the date of printing (October 2022).

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