

Phillip CFD - Referral Programme

Introduce your friends to Phillip CFD today. For every successful* referral you make, both you and your friend get to enjoy SGD150 CFD trading credits! To participate, simply complete below referral form and send it back to us.

*Please refer to our [Terms and Conditions](#)

Email: cfd@phillip.com.sg **OR**

Mail to: [Attention: Phillip CFD]

250 North Bridge Road
#06-00 Raffles City Tower Singapore
179101

(A) Your Personal Details

Full Name

Contact Number

POEMS Account Number

Please Check The Boxes

- ☐ I consent to having Phillip Securities Pte Ltd ("PSPL") disclose my name to the Referred Client(s) (as listed below). Please note that PSPL may identify you, to your friend, as the person who has made the referral.
- ☐ I have disclosed to the Referred Client(s) that I am not a representative of PSPL and am not authorized to provide advice or make any investment recommendation on behalf of PSPL.
- ☐ I have read, understood and agreed to be bound by the Terms and Conditions* of this Referral Programme (refer to overleaf for details).
- ☐ I would like to request for my friend to open a PSPL account under my current dealer/remisier.

Signature of Referrer

.....
Date:

(B) List of Referred Clients

Friend #1

Full Name

Contact Number

Email Address

Does your friend have an
existing POEMS Account?

☐ Yes
☐ No

Friend #2

Full Name

Contact Number

Email Address

Does your friend have an
existing POEMS Account?

☐ Yes
☐ No

Friend #3

Full Name

Contact Number

Email Address

Does your friend have an
existing POEMS Account?

☐ Yes
☐ No

Terms & Conditions

1. This Referral Programme ("Programme") is open to existing Phillip CFD clients referring new to Phillip CFD clients. The Programme will be valid from 1 January 2026 to 31 December 2026, both dates inclusive ("Promotion Period").
2. The referral is deemed to be successful ("Successful Referral") when the new Phillip CFD client ("ReferredClient") referred by the Eligible Client meet the following requirements ("Requirements"):
 - i. Successfully opens a new CFD account

- ii. Make a one-time initial deposit of an amount equal to or greater than S\$5000 into your CFD account within 5 business days from the date of account opening and not withdraw any amounts from the account within 2 months from the date of initial deposit
- iii. Trade 5 different SG Equity CFD counters ("Eligible Trades") within 2 months from the date of account opening
- 3. "Eligible Trades" refer to a buy/sell SG equity CFD trade only. The 5 trades have to be performed on different counters within two months of account opening. Rollover trades are not included. All T&Cs pertaining to Account Application shall apply.
- 4. Each Eligible Client can only refer up to 5 friends.
- 5. Referred Client will not be entitled to any other Phillip CFD promotions that are running concurrently with this Programme.
- 6. Referred Client will be contacted by Phillip CFD via phone to explain the Programme, CFD product and risks of CFD trading. Referred friend has to acknowledge the terms and conditions of CFD trading and the Programme and agree before proceeding to fulfill the "Requirements". Following acknowledgment, an email will be sent to the Referred Client with further instructions.
- 7. In the event that a Referred Client cannot be contacted to acknowledge point (6), an email acknowledgment from the Referred Client is required within one month to be considered under the Programme.
- 8. If a Referred Client is referred by more than one Eligible Client, the Eligible Client from whom Phillip CFD receives the Referral Form first will be considered under the Programme.
- 9. Trading credits of SGD150 will be credited to the Phillip CFD accounts of the Eligible Client and Referred Client by the end of the month in which the Successful Referral occurs. These CFD Trading Credits are non-transferable.
- 10. The Referred Client consents to having his or her name and status of successful signing up under the Programme disclosed to the Eligible Client.
- 11. Phillip Securities Pte Ltd (PSPL) reserves the right to recover the Trading Credits awarded, if Eligible Client or Referred Clients withdraws the trading credit or terminates his/her account with PSPL within 3 months of crediting. In the event there is a margin deficit due to deduction of trading credits, debit interest charge will be applicable. Refer to CFD Information Sheet for debit interest charge.
- 12. All employees and agents of PSPL and its associated entities and subsidiaries (direct or indirect) are not eligible to participate in this Promotion.
- 13. In the event of a dispute over the client's eligibility to participate in this promotion, PSPL's decision will be final.
- 14. By taking part in this promotion, the participant acknowledges that he/she has read and consented to these Terms & Conditions.
- 15. This advertisement has not been reviewed by the Monetary Authority of Singapore.

Disclaimer

This is provided to you for general information and is solely for private circulation only. You may from time to time be provided with investment and financial related information and reports, including but not limited to research reports and market or securities specific analysis. It does not constitute, nor should it be construed as, a recommendation, an offer or solicitation to buy or sell the investment product mentioned.

This publication 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 no liability whatsoever is accepted for any loss arising whether directly or indirectly as a result of you, or any person or group of persons acting based on this information. Whilst we have taken all reasonable care to ensure that the information contained in this publication is

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accurate, it does not guarantee the accuracy or completeness of this publication. Any recommendation or advice that may be expressed in or inferred from this publication is made on a general basis with no regard to any specific investment objectives; financial situation or any of your particular needs and is subject to change without notice.

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) before trading in this product.

Any CFD offered is not approved or endorsed by the issuer or originator of the underlying securities and the issuer or originator is not privy to the CFD contract. This advertisement has not been reviewed by the Monetary Authority of Singapore.

Phillip Securities Pte Ltd and its employees mentioned herein cannot be held liable for any errors, inaccuracies and/or omissions howsoever caused.

Please use this business reply folder to send us your documents.

- 1) Fold along dotted lines.
- 2) Insert documents into business reply folder.
- 3) Seal along edges of folder with clear tape (do not staple).
- 4) Drop sealed folder into post box.

Postage will be
paid by
addressee. For
posting in
Singapore only.

BUSINESS REPLY SERVICE
PERMIT NO. 02099



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250 NORTH BRIDGE ROAD
#06-00 RAFFLES CITY TOWER
SINGAPORE 179101

ATTN: Phillip CFD (Marketing)