

Bulk Trading Made Simple

Easily execute bulk trades across Buy, Sell, Invest, Raise, FX, and Switch functions.

1. HOW TO GET STARTED

From your spreadsheet, copy the table containing the custodian accounts and their associated quantities or monetary values (use Ctrl + C to copy the data).

	A	B	C	D	E
1	CC079129 D	100			
2	CC079830 D	100			
3	CC079831 D	100			
4	CC079897 D	100			
5	CC082354 D	100			
6	CC082355 D	100			
7	CC082476 D	100			
8	CC082477 D	100			
9	CC082478 D	100			
10	CC082479 D	100			
11	CC082480 D	100			
12	CC082481 D	100			
13	CC082482 D	100			
14	CC082483 D	100			
15	CC082705 D	100			
16					
17					

2. ENTER ACCOUNTS FOR THE SELECTED SECURITY

Complete Step 2 for the security you intend to trade, then proceed to “Enter Accounts” to paste and process your bulk trade.

The screenshot shows the 'Order Details' step (Step 1) of a trading process. At the top left, there is a 'Buy' button. A progress bar at the top indicates Step 1 is active, with Step 2 'Accounts' visible. The form contains the following fields:

- Security Search:** A dropdown menu.
- Estimated Price:** A text input field.
- Reason for Dealing:** A large text area.
- Talk to me:** A radio button.
- Order Date:** A date picker showing 23/06/2025.
- Settle Date:** A date picker showing 25/06/2025.
- Order Type:** A dropdown menu showing 'MKT'.

3. PASTE YOUR DATA INTO THE TABLE

In the open table where your cursor appears, press Ctrl + V to paste the copied account information.

The screenshot shows the 'Accounts' step (Step 2) of the trading process. The top left shows 'Buy' and the security 'AAPL.US APPLE INC'. A progress bar at the top shows Step 1 'Order Details' as completed and Step 2 'Accounts' as active, with Step 3 'Confirm Order' visible. The estimated price is shown as '\$ 222.435' as of 2024/09/13 (USD). The form includes:

- ACCOUNT SEARCH** and **MY GROUPS** tabs.
- Account Search:** A dropdown menu.
- Quantity:** A text input field with an **ADD** button.
- Table:** A table with columns: Account, Account Name1, Account Name2, Quantity, Est. Cash Balance, and Est. Consideration.
- A message below the table: "Please add at least 1 account".

4. REVIEW YOUR POPULATED TABLE

Your table will automatically populate with the data from your spreadsheet, ready for review and submission.

Account	Account Name1	Account Name2	Quantity	Est. Cash Balance	Est. Consideration	Current Holding	Current Holding Perc.
CC079129 D	Sxxxx Axxxx Sxxxx Jxxxx		100	\$-13,563.27	\$22,243.50	0	0.00%
CC079830 D	Pxxxxx Axxxx Jxxx		100	\$-20,851.52	\$22,243.50	0	0.00%
CC079831 D	Qxxxxx lx - 5xxxxx	Mx Axxxx Jxxx Pxxxx	100	\$-15,858.61	\$22,243.50	0	0.00%
CC079897 D	Jxxxx Hxx Pxxxxx Txxxxx...	Mx Axxxx Jxxx Pxxxx	100	\$-18,832.45	\$22,243.50	0	0.00%

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