

Share Margin Financing – Global Market (SMF-GM) FAQ

1. Opening a SMF-GM Account

If you already have a Margin Account, you can extend your facility to include financing for shares listed on foreign exchanges by completing and submitting the “**Margin with Global Market Access**” form.

If you do not currently have a Margin Account, you can apply for one by submitting the following documents to any of our [Phillip Investment Centres](#) :

Required Documents:

- Completed Margin Application Forms
- Photocopy of NRIC or Passport
- Copy of your latest annual income statement, **OR** latest 1-month salary slip, **OR** Form BE / Form EA
- Latest 1-month bank statement

SMF-GM is only available on the **POEMS platform**.

2. Which foreign exchanges are covered by SMF-GM?

In addition to **BURSA**, the facility covers:

- **NASDAQ**
- **AMEX**
- **NYSE**
- **HKSE**
- **ASX**
- **SGX**

3. What is the price capping for foreign exchanges?

A maximum of **50% of market value** will be given for **index-linked stocks**. Please check with your **Dealer Representative (DR)** for details on applicable exchange indexes.

4. How does buying non-index stocks affect my Margin of Financing (MOF)?

If you purchase non-index stocks on foreign exchanges, your **MOF ratio will be impacted**. These stocks are not assigned value in your margin account, meaning they **do not contribute** to your equity value for MOF calculation.

5. How are my MOF and margin limit calculated if I have both local (BURSA) and foreign shares?

The **capped value** of your foreign-listed shares will be converted into **MYR** deriving from the current FOREX rate. This value will be combined with your BURSA shares (also capped) to determine your total **equity value**, which is then used for MOF ratio and margin limit calculations.

6. Does selling foreign shares increase my margin limit?

Yes. Your **margin limit (in MYR)** will be automatically updated after you sell shares, whether they are local or foreign-listed

7. I am having issue/question with my SMF-GM, how do I get help?

You may contact your Dealer's Representative or call us at 03 2783 0388. Alternatively, you can also email us at cse.my@phillipcapital.com.my.