



Virtual Portfolio

Simple and convenient way to keep pulse of investment opportunities.



Create multiple portfolios, and access the latest data, news, or researches related to what you are interested in most.

Reap the benefits of Virtual Portfolio:



Save time to keep track of many opportunities you are interested in.



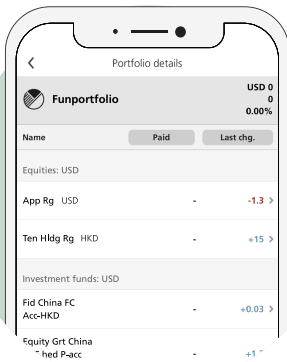
Track price movement and access to UBS research and views.



Set up price limits and get alerted when a price matches.

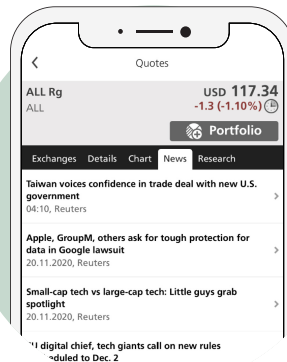


Freedom to share what you are interested in with your Client Advisor or vice versa.



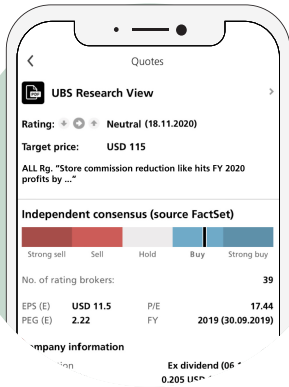
Portfolio Details

View the instruments you have added and keep track of their developments in one place.



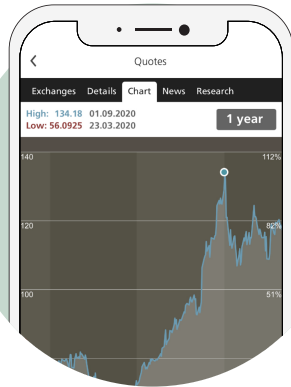
News

Read about the latest and global happenings of your instruments.



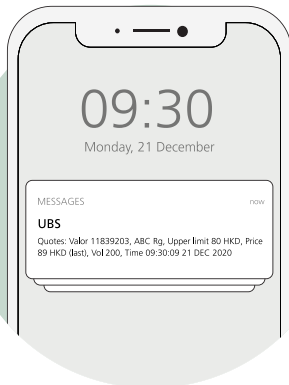
Research

Get UBS research views to evaluate the potential of your instruments.



Price Chart Display

Look into key price movement from a selected timeline.



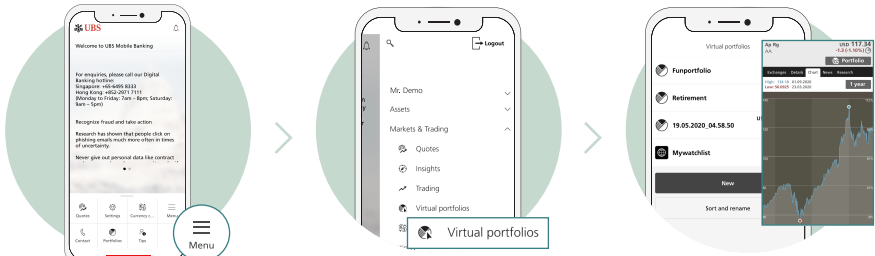
Notifications on Price Alert

Receive SMS or Email notifications when the price matches up.

Virtual Portfolio in Mobile Banking

How to Find?

1. Log in to Mobile Banking.
2. Select “Menu”, followed by “Markets & Trading” and “Virtual Portfolios”.
3. A list of virtual portfolios will display. Select any, followed by an instrument to view information related to it, such as the latest stock quote, news, along with recommendations and findings researched by UBS.



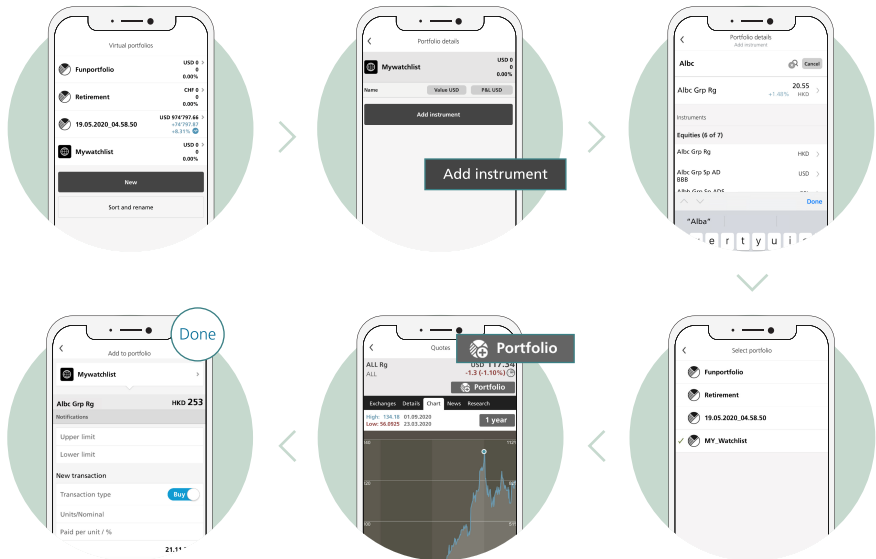
How to Create?

1. Under Virtual Portfolios, select “New” to create a new portfolio.
2. You may personalize it by changing the name, icon, and base currency.
3. Once completed, select “Done”.



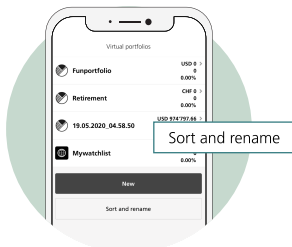
How to Add Instruments?

1. Select your preferred portfolio under Virtual Portfolios, followed by "Add Instrument".
2. Search and select the instrument you want to add.
3. Select the +Portfolio icon.
4. Select a virtual portfolio you want to add the instrument to or other trade records.
5. Once completed, select "Done".



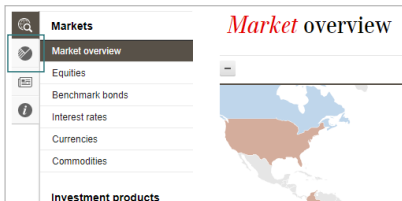
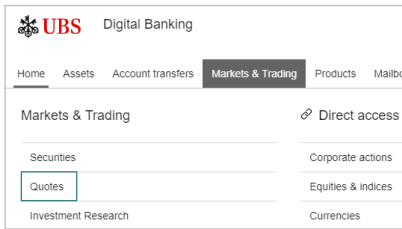
How to Manage?


1. Under Virtual Portfolios, select "Sort and Rename".



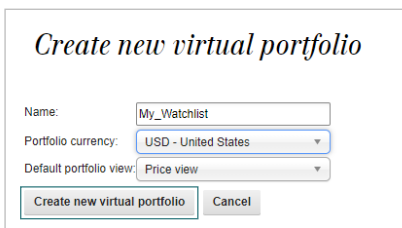
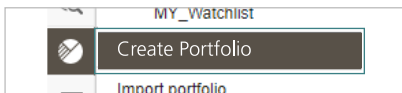
Virtual Portfolio in E-Banking

How to Find?



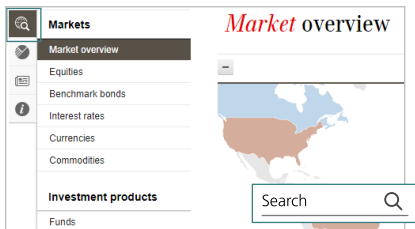
1. Log in to E-Banking.
2. Select "Markets & Trading", followed by "Quotes".
3. After the Quotes page is fully loaded, select the pie chart icon .
4. A list of virtual portfolios will display. Select any, followed by an instrument to view information related to it, such as the latest stock quote, news, along with recommendations and findings researched by UBS.


How to Create?

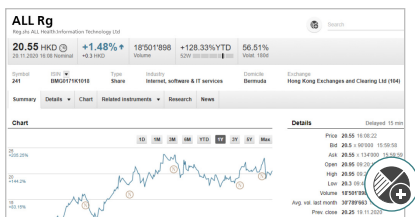


1. Under the pie chart icon in Quotes, select "Create Portfolio".
2. You may personalize it by changing the name and base currency.
3. Once completed, select "Create New Virtual Portfolio".

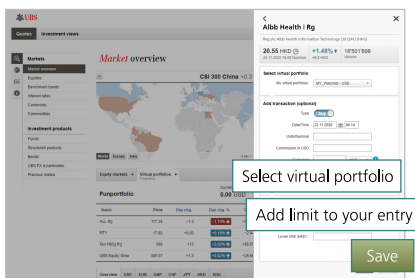
How to Add Instruments?



1. Under Quotes, select the magnifying glass globe icon , followed by "Market Overview".
2. Search and select the instrument you want to add.

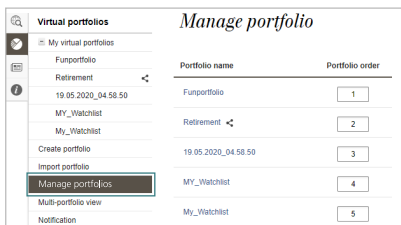


3. Select "Add" to add to a virtual portfolio.



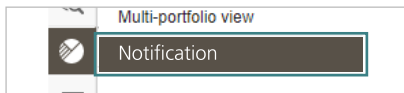
4. Select a virtual portfolio you want to add the instrument to or other trade information. Then, input the price limits to set up notifications.
5. Once completed, select "Save".

How to Manage?



1. Under the pie chart icon in Quotes, select "Manage Portfolios". You may choose to change its setup or share/copy the portfolio to your Client Advisor.

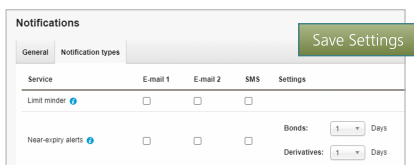
How to Set Up Notifications for Virtual Portfolio?



1. Under the pie chart icon in Quotes, select "Notification".

A screenshot of a "Notifications" settings page. The "Notification types" tab is selected. Under the "Information channel" section, there are three input fields: "E-mail address 1:" with a checkmark and the text "r.*@u*.com", "E-mail address 2:", and "SMS number:". Below these fields is a small note: "No spaces, e.g. +41791234567".

2. Input a valid email address and/or mobile number, and choose the notification types.

A screenshot of the "Notifications" settings page, showing a table of services and a "Save Settings" button. The "Notification types" tab is selected. The table has columns for "Service", "E-mail 1", "E-mail 2", "SMS", and "Settings".

Service	E-mail 1	E-mail 2	SMS	Settings
Limit monitor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Near-expiry alerts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bonds: 1 Days Derivatives: 1 Days

A green "Save Settings" button is located to the right of the table.

3. Once completed, select "Save Settings".



> [Virtual Portfolio](#)
video tutorial.

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