Julius Bär

Julius Baer Market Link

Frequently asked questions

Flexible and convenient, Julius Baer Market Link is easy to use and enables you to trade anywhere, anytime across multiple assets simply by logging in to your personal computer, tablet or smartphone.

Below you will find **quick answers to common questions** that you are likely to have when you start using the demo and live versions of the Julius Baer Market Link. Please also feel free to consult our Quick Start Guide. If you still cannot find the answer you are looking for, contact us at: servicecenter.marketlink@juliusbaer.com.

Demo version

What are the benefits of using the demo version of Market Link?
The demo version enables you to gain stress-free familiarity with the Market Link's functions and markets. During the exclusive 30-day trial period, you get:

- Simulated transactions using virtual money
- Real-time exchange rates
- Stock market prices for all other products in near real-time

What additional features will I receive when I switch from the demo version to the live version of Market Link?
When you decide to upgrade from the demo version to the live version, the platform will be customised to match your domicile and nationality – specifically with regard to your margin requirements, loan-to-value ratios, FX spreads and commission fees.

As well as now being able to trade the full range of investment instruments, you will also benefit from:

- Multiple currency accounts
- Advanced reporting functions
- Automatic notifications for transactions and executed changes in cash holdings or margin calls
- Comprehensive support from the Julius Baer Market Link Service Centre

Live version

How can I access my Julius Baer Market Link account?
You can access your account using most standard web browsers, either via our landing page www.juliusbaer.com/ch/en/marketlink or directly via the link marketlink.juliusbaer.com.

We recommend always using the first link in order to keep up to date with all important news.

Which devices can the Market Link functions be used on?
The full functions of Market Link can be used on any device with a modern browser that supports the HTML5 standard.

Can I use Market Link on my smartphone or tablet?
Yes. The full functions of Market Link can be used on mobile devices such as smartphones or tablets with the following mobile operating systems:

- iPhone 8 and higher that use operating system iOS 16 and higher
- iPad Air (3rd generation) and higher that use operating system iOS/IPadOS 16 and higher
- Android smartphones and tablets that use operating system OS 11 and higher

Where can I learn how to use Market Link's functions?
To give you full confidence in using the platform, we advise you to read the Quick Start Guide, which can be found **here** along with other downloads.

Among many other things, the Quick Start Guide provides clear and comprehensive instructions on how to:
- Access your account
- View your balances and positions
- Place trades and orders
- Personalise your trading experience

How can I transfer funds to my Market Link account?
You can transfer funds to your Market Link account quickly and easily from your Julius Baer private banking account or a third-party bank account. Please use the International Bank Account Number(s) (IBAN) provided in your welcome letter.

How can I withdraw funds from my Market Link account?
You can withdraw funds from your Market Link account by contacting your relationship manager, who will verify your needs and speedily initiate the withdrawal.

Can I change the currency account for a trade?
Yes. In fact, we actually strongly recommend actively selecting the currency account to match the currency of the respective instrument to be traded.

If you requested several accounts in different currencies (CHF, EUR, USD, GBP, JPY, CAD, SGD or HKD), the base currency account will be selected for every transaction irrespective of the instrument currency chosen. If this differs from the currency of the currency account, an implied currency conversion will take place.

Why can I not place my order?
Please note that some instruments (e. g. currencies) require certain minimum amounts. These are generally displayed directly on the trading platform and have to be fulfilled. The meaning of the colours in the bid/ask fields is explained in the Support Center menu.

Why is my order not being executed?
This may be due to several reasons. For example, your order may not have been executed yet because a set limit has not yet been reached, or because the relevant stock exchange is not open (see the colour of the symbol in the order entry window).

Do changes to the margin requirements affect my positions?
The margin requirements are set by each stock exchange or intermediary/trading partner and may be changed without prior notice. Changes to the margin will thus also affect existing positions. We therefore recommend checking your margin/account summary regularly.

Are the margin requirements for opposing trading positions offset against each other (netting)?
No, delta margining is not applied when trading spot/forward transactions and currency options. Instead, the net value of an option strategy is taken into account in the margin calculation for each expiry date and currency pair.

How are positions in Market Link valued?
In the Open Positions module, the position is valued in the Profit and Loss (P&L) column using an average price. This price is the arithmetic mean of the bid/ask spread.

If the customer has not subscribed to real-time stock market prices, he will see delayed prices. The figures under P&L are therefore calculated for securities with delayed prices. Margins are calculated based on real-time quotes and displayed simultaneously. FX positions are always calculated in real time and therefore do not need to be subscribed to.

How do I view stock market prices in real time?
All stock market prices are displayed with a delay of at least 15 minutes. To receive these prices in real time, we recommend that you take out a subscription to stock market prices.

Which price do I see in the order window?
The order window displays prices with a delay, except in the case of stock exchanges for which you have taken out a subscription (see previous question). Real-time prices are shown for FX transactions (spots, forwards and options).

How are the fees charged for the individual stock market prices that I have subscribed to?
Fees are charged for each calendar month or part thereof. This means that, even if you take out a subscription at the end of a month, the stock exchange will charge you for the whole month. Please also note that you will have to conclude a separate agreement in your own name with the stock exchange concerned.

Can I set up alerts that will notify me automatically when prices reach certain levels?
Yes, you can. Due to legal restrictions, however, these are only published on the platform itself and are not sent by e-mail or text message. If you have any further questions in this regard, please contact the specialists at the Service Centre.

Why do I see different instruments in the live version than in the demo version?
For legal and regulatory reasons, the range of instruments available for trading in the live version may differ from those available in the demo version. If an instrument does not appear in your instrument explorer, it is not available for trading. If you have any questions about the availability of a particular instrument, please contact your relationship manager.

Can I integrate my Market Link account into my existing Baer® online e-Banking account?
No. Julius Baer Market Link and Baer® online e-Banking are two platforms that operate independently of each other. As a result, the two accounts cannot be combined.

Contact

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