



1. What type of account will I be opening for the DT services?

Clients would need to open both direct trading and nominee CDS accounts to initiate Discretionary Trading. Clients who already have a direct CDS account with Apex Securities would just need to open a nominee CDS account to initiate the Discretionary Trading services.

2. Can I open a corporate DT account?

Yes, you can open a corporate account for discretionary trading services. However, you would still need to open both direct trading and nominee CDS accounts with us if you have no existing direct account yet.

3. Can I transfer shares to my DT account?

No, you can't transfer shares in, it must either be fresh fundings or you can transfer trust monies from your existing trading account with us.

4. Do the DT services cover foreign trading?

No, the Discretionary Trading Service does not cover foreign trading at the moment as Bursa has not permitted trading products outside of the Malaysian stock exchange

5. What are the charges for DT Account?

As per the Bursa Prescribed Rates for cash-upfront accounts. Other Charges are as followed:-
Equities – 2 models: 20% profit sharing OR 1.5% of Asset Under Management per annum
Derivatives – 20% profit sharing

6. Is there lock-in period for the DT services?

The Discretionary Trading services runs on a rolling contract basis. There is no lock-in period but there is an early penalty charge upon withdrawal within a year after initiation.

7. Can I view my shares like a normal CDS account?

A detailed monthly custody statement would be sent to you.

8. Can I perform additional top-ups or withdraw throughout the DT services?

Yes, you may top-up and withdraw at any time throughout the contract. *For withdrawals, please refer to question 6.

9. What are the risks involved in discretionary trading?

Like all investments, discretionary trading entails risk associated with the uncertainty of market conditions, unforeseen circumstances, unexpected developments associated with the investment portfolio, and other risks that will cause fluctuation in the value of assets under management.