

# wikifolio traders' do's and don'ts

As of March 29<sup>th</sup> 2022

*Will your wikifolio be successful? Well, that's primarily down to you, then partly down to the community. A greater awareness of your wikifolio means a greater chance of investment. The better they know you and your opinion, the better they can evaluate your actions.*

*The best thing is: **It's in your hands** – and we provide support for you.*

In this short guide, we have summarised for you which points you should take into consideration when posting information about your virtual portfolio:

## 1. Always talk about your wikifolio (virtual portfolio), not about the wikifolio certificate

The more active you are, the greater the chance is that the community will become aware of your wikifolio. When you post comments, analytical reports and opinions relating to your wikifolio virtual portfolio, it is important to note the **distinction between the wikifolio virtual portfolio** (managed by you, the wikifolio trader) **and the wikifolio index certificate** (continuous index certificate of Lang & Schwarz Aktiengesellschaft).

- Your communication should always refer to the wikifolio virtual portfolio. It is not permitted to name, publish, or otherwise promote the ISIN of the wikifolio index certificate.
- The invitation to invest in a specific wikifolio index certificate is also not permitted. This is classed as investment advice, which is a licenced service.

## 2. Use of logo, wikifolio green and wording

### **Who may use the wikifolio logo?**

The wikifolio logo may only be used after consultation with wikifolio. Details on the use of the brand, the logo and the wikifolio shade of green will be agreed in detail in these cases. Under no circumstances, even in the case of a permitted use of the brand [i.e., the logo and wikifolio green], may wikifolio be identified as the promoter/sender through the placement and/or context.

### **Your connection to wikifolio**

We are happy for wikifolio traders to refer to themselves as such. However, they should not give the impression that they are employees of wikifolio. We therefore ask you not to list wikifolio as your employer on career platforms such as Xing or LinkedIn.

### **wikifolio wording**

Please note: wikifolio is always written in lower case. wikifolio refers to the wikifolio virtual portfolio, the name of the company and the platform itself. wikifolio.com is occasionally used when referring to the actual URL. (This has been the case since spring 2022, as previously both the company and the platform were known as wikifolio.com).

## **3. Online and offline media**

Do you have a blog or newsletter, are you active on YouTube, Instagram, or other channels? Feel free to post descriptions of your trading ideas or information on individual trades there as well. This is the way to draw the attention of the community to your wikifolio. Network frequently with other wikifolio traders to get additional ideas and inspiration for writing posts about your wikifolio. Link videos and your external posts to your comments on wikifolio.com, thereby strengthening the two-way traffic.

Please ensure that also in such cases as these (as well as in the case of offline materials, such as presentations and printed marketing materials) the following points are adhered to:

- Ensure a strict separation between the virtual portfolio (wikifolio) and the financial product (wikifolio certificate) – see 1. Always talk about your wikifolio (virtual portfolio), not about the wikifolio certificate
- The ISIN of the wikifolio open-ended index certificate may not be referenced.
- Formulate your posts in such a way that they are not morally offensive or attack or denigrate others (e.g., wikifolios or wikifolio traders).
- This also applies to discussion groups on various platforms and the social media channels of wikifolio itself. (FYI - all advertising posts for investable wikifolios or attacks on other wikifolio traders will be deleted by our administrators, without exception).

## 4. Posts on wikifolio.com

### 4.1. wikifolio comments on wikifolio.com

Why are you currently selling stock A and buying stock B instead? Which trends influence your wikifolio?  
What are you expecting to happen in the coming weeks and months?

Talk about your wikifolio activities and help the wikifolio community to understand you better. This will help you not only to establish trust in your wikifolio, but also to increase your visibility as:

- Comments are one of the favourite elements in the users' personal news feeds and
- They are also published on the platforms of wikifolio's partners (e.g., finanzen.net, onvista)

The following applies to all comments:

- The content **must be relevant** – that means connected to your wikifolio, the securities in your virtual portfolio or the financial markets
- **Links** are allowed, but only when they provide further detailed information in relation to your comments
- Write your **own** comments: Content that has already been published on other pages on the Internet is not optimally indexed by search engines
- **No advertising** or similar promotional formulations **for financial products** (wikifolio open-ended index certificate) **and/or tools**
- Do not give e-mail addresses
- A **professional tone** builds trust with the reader. Improper, indecent, inflammatory, or otherwise inappropriate content is prohibited
- **Avoid promises or predictions:** especially when these relate to your trading idea, its implementation, performance, or the risks involved.

**FYI:** wikifolio comments are randomly screened by wikifolio on a daily basis. If a wikifolio trader is requested to change or remove comments from the platform, they must do so immediately. If we delete content of our own accord, we will of course notify the wikifolio trader concerned.

## 4.2. wikifolio trader profiles

Your profile is your business card. You are presenting yourself, your abilities, and your experience to the wikifolio community. Let the investors know what experience you already have with securities, what your personal investment style is and which investment categories or indexes you are most interested in.

Please consider the following:

- Please create an **exclusive profile description** for your wikifolio user account. The contents should not have been previously published elsewhere on the internet
- **No advertising** or similar formulations relating to financial products and/or tools. In particular, ISINs are not to be mentioned
- **Do not list e-mail addresses** or other direct contact details (phone number, postal address etc.)
- **Links** are allowed, but only those which link to your own blog or the social media site
- Also here it's worth noting that **a professional tone** helps to establish trust with the reader