

octa  fx

Brand Guide

Who are we?

OctaFX is a global CFD* broker. It has been providing online trading services worldwide since 2011.

*A contract for difference (CFD) is a financial contract between an investor and a CFD broker to exchange the difference in the value of a financial product between the time the contract opens and closes.

Our services

OctaFX Trading App

Our main trading app with a diverse range of financial instruments and in-app settings. Available on iOS and Android.

OctaFX Copytrading App

A copy trading app where investors can automatically copy orders of more experienced traders.

Octa Partners

A service for IB (Introducing Broker) partners of OctaFX around the world where they can manage their affiliate accounts.

OctaTrader (coming soon)

Our custom-designed seamless in-app trading platform. Our clients trade, manage accounts, and make effective investment decisions—all in one place.

Why OctaFX?

Best offers in the market

- Local deposit and withdrawal methods
- Lowest spreads
- Fast execution
- No commissions
- No swaps
- 230 trading instruments (including currency pairs, CFD on stocks, indices, commodities, and cryptocurrencies)

Funds and data security

We use segregated accounts to keep clients' funds protected, implement secure withdrawal rules, and employ 128-bit encryption to protect our clients' data.

Our own trading platform — OctaTrader (currently in development)

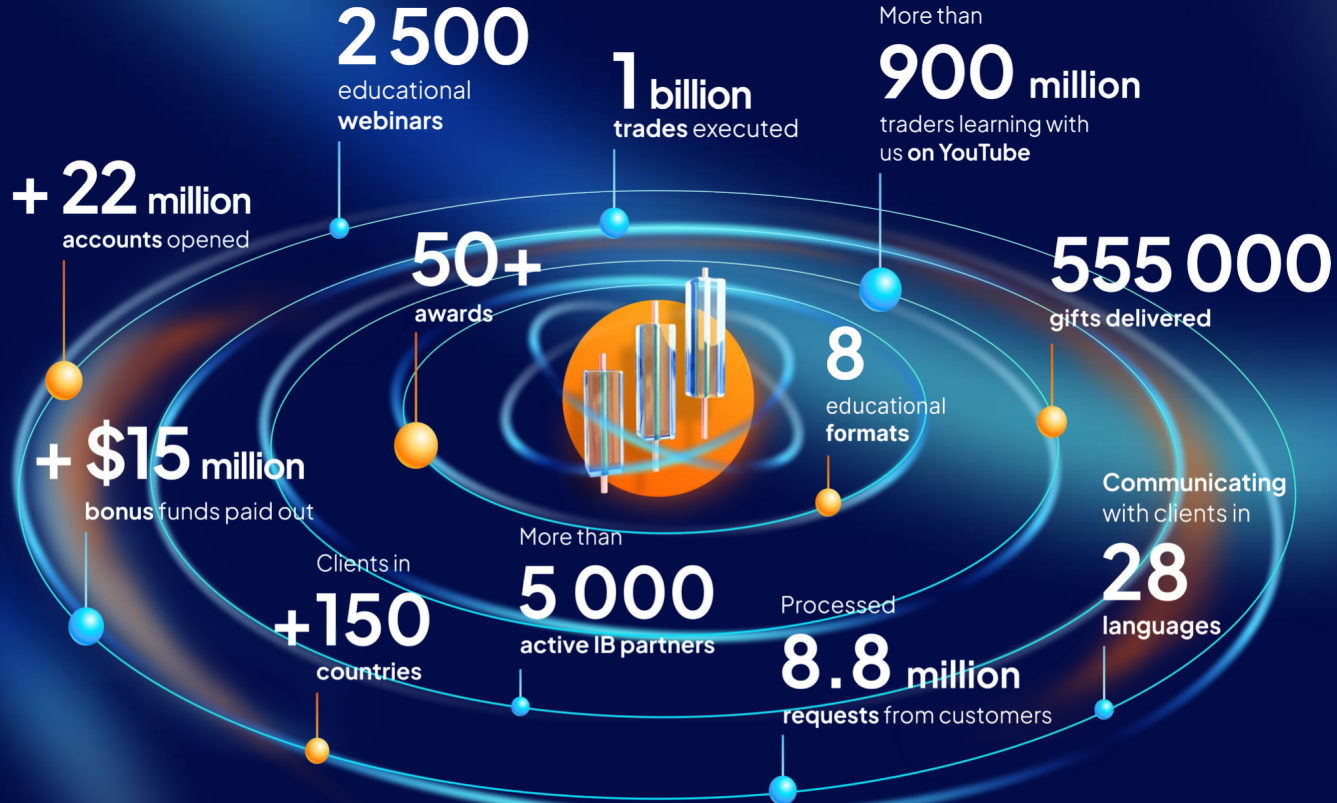
The platform's primary purpose is to enable users to trade, manage their accounts, have a diverse range of tools for investment decision-making and analyse their trading—all within the same application.

Why OctaFX?

- 600+ hours of free educational content in 7 languages every year
- 24/7 multilingual Customer Support
- Professional analytics and daily trading ideas
- CSR activities all over the world
- 55+ industry awards



Over 11 years in the financial markets at a glance



Communication goal

PR GOAL = COMMUNICATION GOAL

1. **Brand equity** = (awareness, loyalty, perceived quality)

- Brand awareness increases within the segment
- OctaFX is associated with the following:
 - investments
 - best trading conditions
 - trustworthy broker.

2. **Reputation**

- anticrisis communications
- more positive mentions of the brand than negative ones.

Brand Platform

Our Mission is to ensure everyone can achieve their investment goals.

Our Vision is centred around developing an ecosystem for investing where the client has everything necessary to make effective decisions.

Brand Message

We are focused on our clients' goals.

What we do as a brand: we empower our clients to achieve their investment goals.

Our values

- Transparency
- Client-centred approach
- Development
- Data-driven approach
- Focus

Brand essence

- Investment
- Confidence
- Accessible (culturally specific)
- Trendy
- Development

Emotional benefit

- Making effective decisions
- Covers the customers' pain point of coping with their emotions
- Data-driven approach, development, mindfulness

Functional benefit

- Competitive trading conditions
- Exclusive information for successful investments
- Ease of getting in touch with
and close presence

Brand persona

- Investing
- Achieving investing goals
- Ease of getting in touch with and close presence
- Development

Brand persona

If our brand was a person, what would they be?	Explanation
<p>Our brand is a thirty-three-year-old man.</p> <p>He is married.</p> <p>As of the disposition, he is friendly, supportive, and honest, as well as knowledgeable and success-oriented.</p> <p>Being a person, our brand wears smart casual.</p> <p>He also has a sense of humour but only makes kind jokes in an appropriate environment.</p>	<p>We don't use slangs, sound mature, and only provide relevant user-centred references.</p>
	<p>We are responsible and caring. We tend to understand others.</p>
	<p>We get straight to the point. We're also easy to get along with, and may be excitable about our clients' success.</p>
	<p>We read other people well.</p>

Brand persona

If our brand was a person, what would they be?	Explanation
<p>His preference is world news. Our brand is also a friend- and family-oriented guy.</p> <p>He is always a realist.</p> <p>His hobbies are sports, travels, and self-development.</p> <p>Being a person, our brand uses a smartphone, smartwatch, and a laptop.</p> <p>Our brand demonstrates professionalism and friendliness around others and in private.</p> <p>Our brand has a higher education (college graduate).</p>	<p>We are up-to-date with what we communicate, and we are sincere.</p>
	<p>This means we are tolerant of the culture, traditions, sexuality, and beliefs of our clients. We also are empathic—highly aware of other people's feelings.</p>
	<p>We are adjustable, depending on the device. We provide guides and other materials for both mobile and desktop.</p>
	<p>Our writing is grammatical. We can explain complicated things in simple words. We have an exclusively unique vision in terms of clarity.</p>

Brand persona

If our brand was a person, what would they be?	Explanation
<p>As a person, our brand never lies and never cheats, as well as never demonstrates aggression. He is not a greedy person and never offends against the law.</p> <p>We stick to the rules without undermining someone else's feelings.</p> <p>He is also trying not to be common in what he does or says.</p> <p>When he enters the room, he firstly talks about others, not himself.</p> <p>In the first place, other people think he is sophisticated, knowledgeable, and successful.</p> <p>In the second place, other people find him trustworthy.</p>	<p>We never shut down those who complain.</p>

Messages to promote

The Forex market (as an investment instrument) and the OctaFX brand in particular can be trusted.

OctaFX as a brand is relevant, well-known, and trusted among traders.

Awareness

What do we want to achieve:

I know the OctaFX brand and understand what they do.

Key idea

- investing is the norm of life.
- Forex is a way of investing.
- OctaFX is a forex broker = an investment broker.

Key messages

- OctaFX is a brand you can trust.
- OctaFX exists to ensure everyone can achieve their investment goals.
- Forex is an opportunity to earn extra income, and everyone can benefit from that.

Familiarity

What do we want to achieve:

- I understand that Forex is a way of investing (and part of a lifestyle) and I know how it differs from other investment instruments
- I understand the difference between OctaFX and other brokers.

Key idea

OctaFX will become part of your lifestyle.

Key messages

- OctaFX provides everything you need to use Forex as an instrument that potentially could help you earn an additional income.
- OctaFX is an ecosystem for investing.
- Invest and get an opportunity to make extra income with the best trading conditions.

- Investing is the norm of life.
- Forex is a way of investing.
- OctaFX is a Forex broker = an investment broker.



- 'Investing is worth my attention.'
- Forex is a way of investing.
- OctaFX is a Forex broker = an investment broker = 'it is worth my attention.'

Loyalty

What do we want to achieve:

- I understand the benefits of OctaFX, I already trade with it and will continue to do so, and I am ready to recommend it to others
- OctaFX is already part of my lifestyle. It has everything I need to achieve my investment goals.

Key idea

OctaFX is already part of your lifestyle.

Key messages

- It's not just about investments but also about contributing to society (local community).
- You become part of the investor community when you trade with OctaFX.
- We share the same interests, ideas, and values.
- Set and achieve investment goals with OctaFX.

Messages to avoid

- **easy money**
- **false promises**
- **income promises**
- **unrealistic situations**
- **'playing' instead of 'trading'**
- **luck (and any other terms associated with gambling)**
- **trading as entertainment.**
- **any terms associated with binary options**

Use instead:

Investment instrument, financial instrument, trading platform (app), investment tool, 'make a profit', investing as a hard but ultimately rewarding activity, achieving investment and life goals.

Use the company name correctly

Use only 'OctaFX'

Do not use 'Octafx', 'Octa FX', 'OCTAFX', 'Octa fx', or any other variation.

Customer profile

- They have a regular job or operate a business.
- They have family, children.
- Their goal is to get extra income.
- They analyse their losses, look for and watch educational materials; read the news, analytics. Nevertheless, they rate their skills as average.
- They started to trade with other brokers or trades with other brokers now.
- They use various investment instruments (gold, savings accounts, stocks, cryptocurrencies).
- They look for a broker based on recommendations of friends; Google search results, YouTube, forum reviews, traders' groups on social media.
- They've traded for more than two years.
- They trade at home; in the morning or in the evening, after work.
- They are afraid of frauds and of losing their money; they experience stress when trading and make efforts to control emotions.

Our target audience

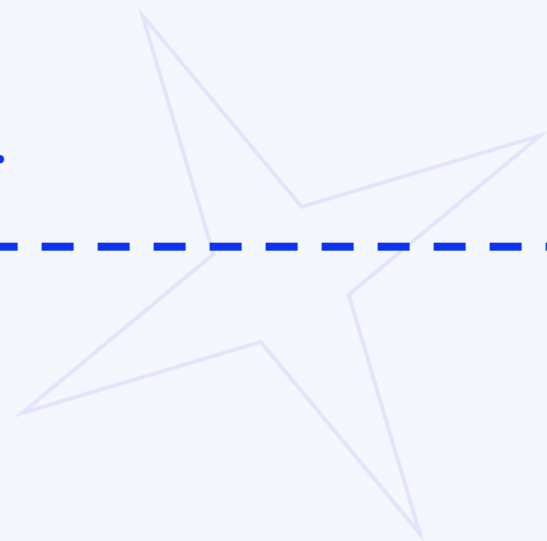
- **Our TA is predominantly 35+.**
- **Our TA mostly trades metals, cryptocurrencies, and indices.**
- **Our TA uses Expert bot, Take Profit and Stop Loss orders often.**
- **Our TA uses MT4/MT5 mobile apps and their desktop versions more often.**
- **Our TA is less interested in exclusively copying trades.**
- **Our TA mostly registers using OctaFX IB (partner) links.**

NOT our target audience

Dreamers—those who want to make a lot of money with a minimum deposit, or those who are not ready to put in the effort.

Those who trade with their last money.

Those who use trading as a gambling game.

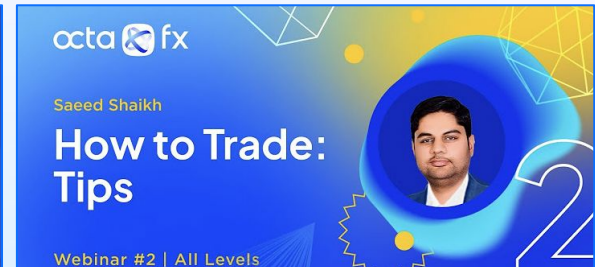


Marketing activities

Brand Ambassadors



Industry experts



YouTube shows starring celebrities



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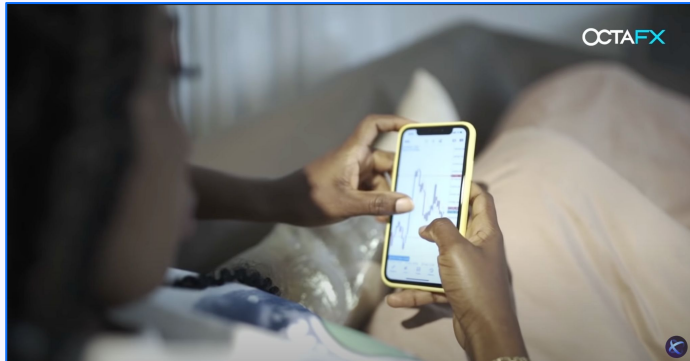


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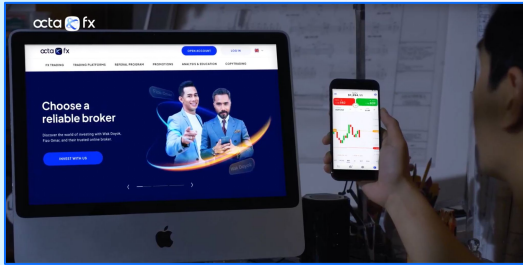


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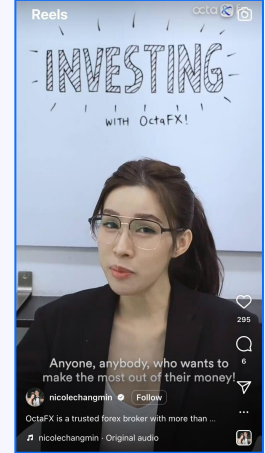
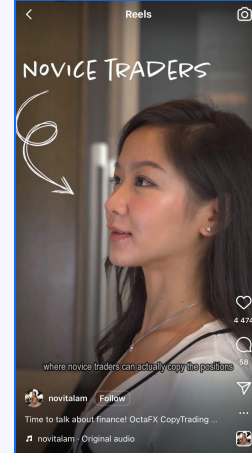
Music videos and collaborations



Branding videos



Integrations with bloggers



Awards

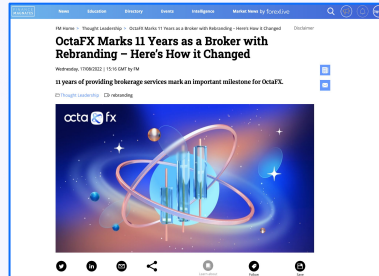


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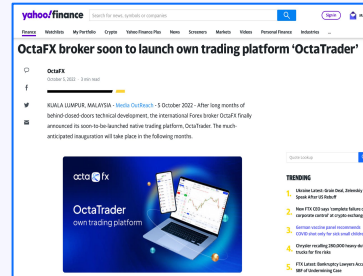
PR activities



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Industry reports on Forex trends

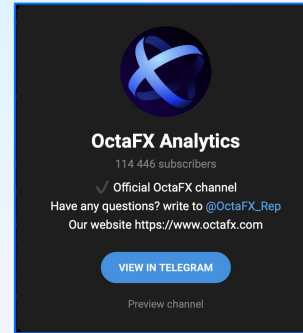
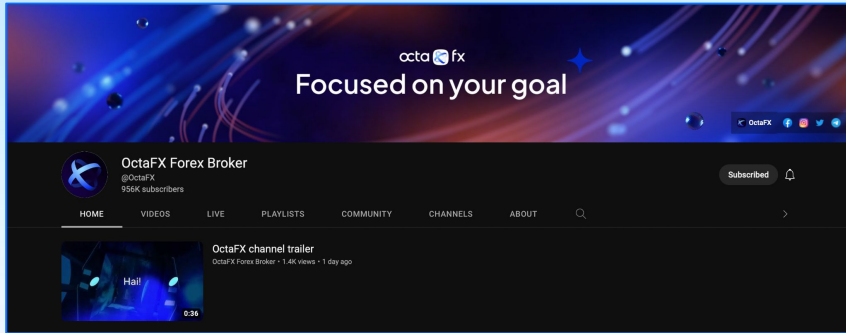


[How to counter Forex Scam](#)



[How Mexican females perceive trading](#)

Global and local social media presence

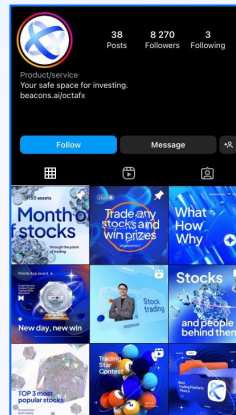


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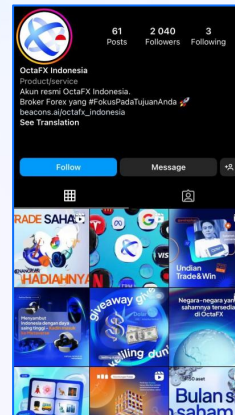
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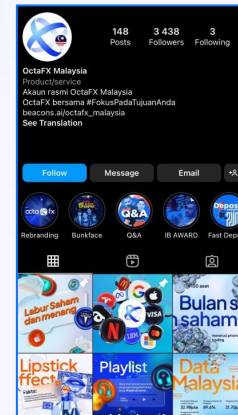
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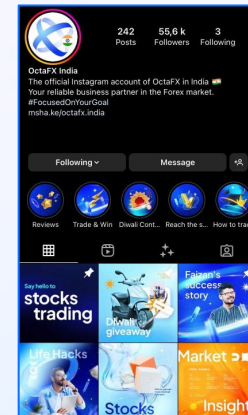
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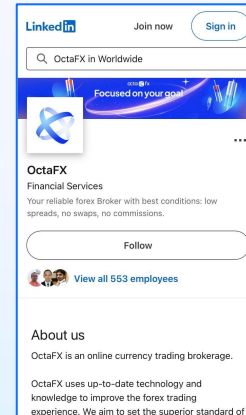
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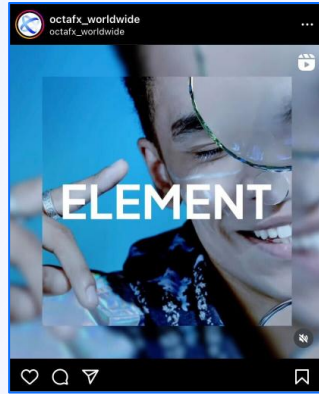
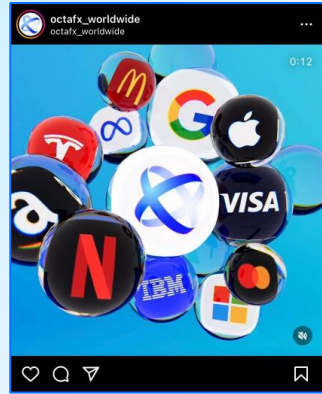


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Contests and giveaways



CRM marketing

octa fx

MetaTrader 4 and MetaTrader 5 are still available

You might have already noticed that MetaTrader 4 and MetaTrader 5 apps are currently unavailable on the App Store. But you can keep trading using your devices.

Here are several ways that will help you trade on.

- Do not delete the MT4 and MT5 apps from your devices. And, just to be safe, disable automatic updates so that the apps remain functional.
- If you deleted the apps or didn't have them, you can always use the desktop or web version – right in your browser.

Trade on web

We have something else in store for those who prefer mobile trading. This week we are launching a web view version of MetaTrader 5 right inside our iOS app. No more extra switching between apps: we have everything available in your pocket. </br> Stay tuned for the announcements.

Trade in our apps

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Gain control over the market

The market can be unpredictable since it depends on many factors such as economic data, news and volatility. The more control you have, the less you risk.

We're happy to help you gain more control with our 'Trading strategies' project.

What will you get?

- Trading strategy with detailed instructions sent to you on a regular basis.
- Wide choice of trading instruments which you can apply based on different market conditions.
- Detailed market analysis that will help you change your trading style, adapt new techniques or create a trading system from zero.

Check your inbox for updates this week, and view some daily analytical content from us while waiting.

View analytics

Trade in our apps

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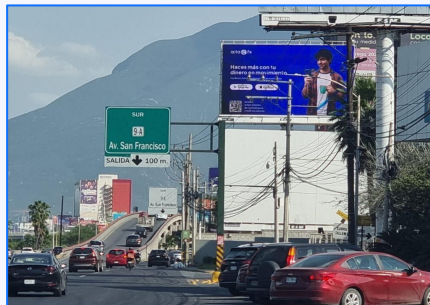
Rebranding

OCTAFX



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Offline branding (OOH & TV spots)



Trade and Win loyalty program

How the program works

The program allows the clients who trade to accumulate prize lots and exchange them for gifts. A client can choose a gift based on the number of prize lots they have, and we will deliver the gift to them.

What our goals are

- increase customer loyalty—by adding gifts the clients ask for
- engagement—additional motivation for clients to trade
- increase brand awareness—the company produces its own merch with its logo and unique design.

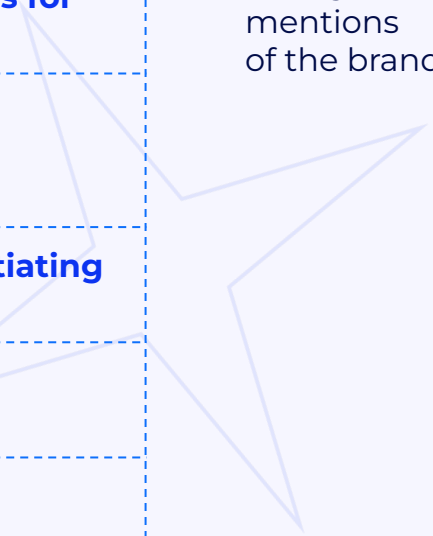
Public Relations at OctaFX

Reputation	Media relations	CSR (corporate social responsibility)
ORM	Press releases	Partnerships with local foundations
Crises	News	Events
Awards	Expert content & expert commentary	Special projects
Reviews	Special projects	

Reputation

Ratings and reviews (Google Play, Trustpilot, Forepeacearmy, App Store)	Industry monitoring digest: legislation, markets, competitors reputation
Media & Blogs SEO-optimised articles	Publication of SEO-optimized articles in media and blogs
Trademark infringement	Feedback ideas: suggestions for improving the service
Crisis communication	Government relations Anti-crisis action plans
Media monitoring	Brand advocates/seeding (initiating positive discussions)
Internal guides	IB ambassadors
Negative feedback (Categorization)	

- Systematic work forms the image of a trustworthy broker.
- The goal is to reduce the number of negative mentions of the brand.



PR approach

It is important to note that as a broker, we integrate the positions and opinions of different experts and provide the necessary tools to **achieve investment goals**, enabling traders to form their positions and make informed investment decisions.

BRAND EQUITY	=	AWARENESS	LOYALTY	PERCEIVED QUALITY	
BA GROWTH IN SEGMENT	OctaFX IS ASSOCIATED WITH:				
Increasing the number of positive brand mentions	Investments	Best trading conditions	Loyalty	Trustworthy broker	Perceived quality
Due to the fact that we place publications about the company in media, carry out special projects with media, publish press releases on projects of other teams, expert articles, etc. (tonality is positive)	publications on investment topics on behalf of OctaFX	telling about our advantages and trading conditions (native content)	telling about what is interesting and relevant to our customers and potential customers	well-known financial experts, heads of charitable organisations and other local speakers give us comments	preparing releases (publications) of high quality (content and visual elements)
* using the same tools, Media Relations affects the Reputation Index (as part of OctaFX's communication goal)	giving special emphasis to achieving investment goals in our publications	placing reviews about us with information about our trading conditions and advantages on specialised platforms	including comments from well-known financial experts and other local speakers in our releases	Tier-1 media publications	publishing in large and industry media
	detailed study of investment topics in articles about Forex and about us		telling how to protect yourself from scammers	receiving awards from specialised platforms	following the rules of professional journalism: we indicate sources, use quotes and expert opinion
	including comments of famous financial experts on investments in our releases		we get published in the media that our clients read	influencing the 'trustworthy' quality with the content of our publications: learn, think strategically, don't throw money around, listen to experts	OctaFX speakers provide comments in articles published in major Tier-1 and industry media platforms
	publishing articles in investment media (and/or investment sections)				placing reviews in industry media

Story types

1. Branded content

Press releases

- **Company & brand news**
- **CSR**
- **Company events**
- **Services/products/new offerings**

2. Expert content

Native content, such as expert commentary on relevant topics.

- **Industry, trends, analytics**
- **Lifestyle investing**
- **Investing**
- **Forex**
- **Education**

Types of expert content we provide

Market analysis

- Trading ideas
- Fundamental analysis
- Technical analysis
- Forex news

Educational content

- Educational articles
- Webinars
- Tutorials

Expert articles

- On Forex and other investments
- Relevant, significant topics
- Educational articles written by experts

CSR: areas of activity

OctaFX:

OctaFX exists to ensure everyone can achieve their investment goals.

CSR areas of activity:

- **Education**
- **Supporting small businesses**
- **Supporting local communities**

SOCIETY:

CSR as an ideology is based on the [UN Sustainable Development Goals](#)*



These areas were selected based on the mission of OctaFX, the UN Goals and the regional studies.

*The United Nations now comprises 193 states and aims to build a more sustainable world.

OctaFX visual identity

Visual identity guideline